DocuWare

From Documents to Value

What's new in DocuWare Version 6.5

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Contents

1 New version of DocuWare lets you work smarter 5

1.1 The New User Interface 6

1.2 New Options 10

2 Storing Documents 11

2.1 Scanning and Storing 11

2.1.1 Mobile Document Scanner 11

2.1.2 Importing Documents from Network Folder 12

2.1.3 Deleting Separating Pages 13

2.1.4 Easily Track the Index Suggestions of Intelligent Indexing 14

2.1.5 Custom Naming of Document Types 15

2.1.6 Comparing Intelligent Indexing Results with External Sources 16

2.2 Printing and Storing 16

2.2.1 Electronic Signature with DocuWare Control 16

2.2.2 Replacing the Content of Readout Areas 17

2.3 Email Management 18

2.3.1 Automatically Attaching Edited Documents to Emails 18

2.3.2 Accessing and Archiving Email from the Exchange Server 19

2.3.3 Saving Email in a Basket with Connect to Mail 21

3 Workflow – Control Complex Business Processes Professionally 22

3.1 Assigning Data – New Activity 22

3.2 Calling up the Web Service – New Activity 22

4 Additional New Features and Improvements 24

4.1 Modified System Requirements 24

4.2 Smart Connect in DocuWare Desktop Apps 24

4.3 Smart Connect: Automatic Tool Kit Selection 25

4.4 DocuWare Mobile in Even More Languages 25

4.5 DocuWare Mobile for Blackberries with Touchscreen 26

4.6 DocuWare Includes Microsoft SharePoint 2013 26

4.7 Managing DocuWare 26

4.8 Usability Improvements 27
4.8.1 Installing DocuWare Desktop Apps Directly 27
4.8.2 Recognition Technology Is Automatically Selected 27
4.8.3 Further Improvement to DocuWare Desktop Apps 28
4.8.4 Enable Connection in DocuWare Desktop Apps 28
4.8.5 Finding Index Fields for Workflows Even Faster 28
4.8.6 New Options When Naming Workflows 30
4.8.7 Always Stay Logged in 30

1 New version of DocuWare lets you work smarter

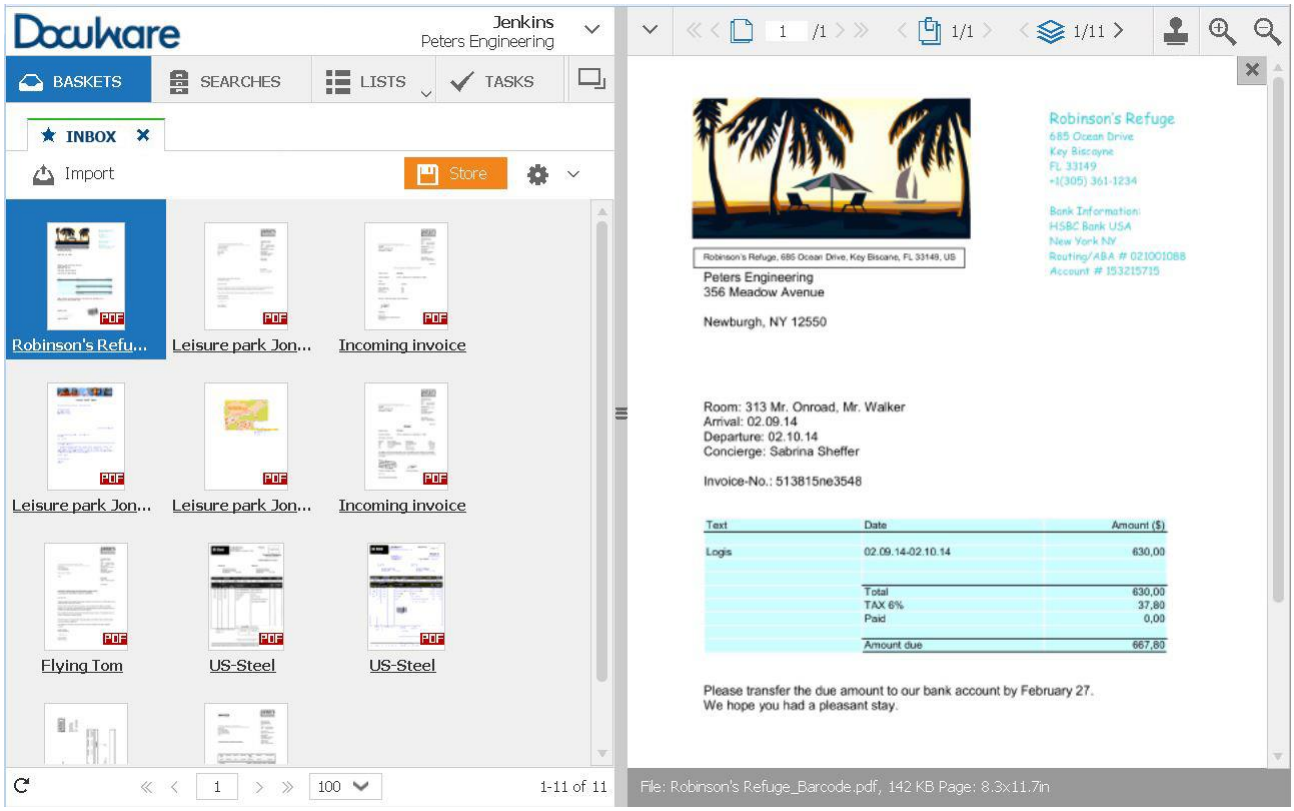
More than ever before, our users were the focus when it came to developing DocuWare Version 6.5. The improved user navigation makes working with the document management system more fun, and even easier. New users can easily find their way around the intuitive interface, and existing users will quickly appreciate the advantages. The fresh, modern design also ensures that work is enjoyable, and its clarity increases transparency.

User navigation is oriented around typical DocuWare workflows, such as storing or searching for documents. Depending on the activity, the necessary elements and functions are automatically enabled, while others are hidden. For example, if you want to store a document from the basket into a file cabinet, the store dialog automatically appears over the basket. At that point you can quickly check or enter index values as the document is not only displayed in the viewer but One Click Indexing is also enabled. All you have to do is click with the mouse on the desired words in the document, and you're done! Of course, things are even faster with ***Intelligent Indexing. http://www.docuware.com/product/intelligent-indexing*** Once the document is stored, the basket is automatically displayed again.

But DocuWare doesn't just look different. Web Client – the nerve center of DocuWare – has also had a complete technological overhaul. DocuWare is now fully based on the very latest HTML5 technology; additional components such as Microsoft Silverlight are no longer required. You really are equipped for the future. You can start benefiting from it right away as it will help you to work faster and more seamlessly. Google Chrome is also now officially supported. System administrators will also be interested in the improved scalability through the modified provision of clients on the Web Server.

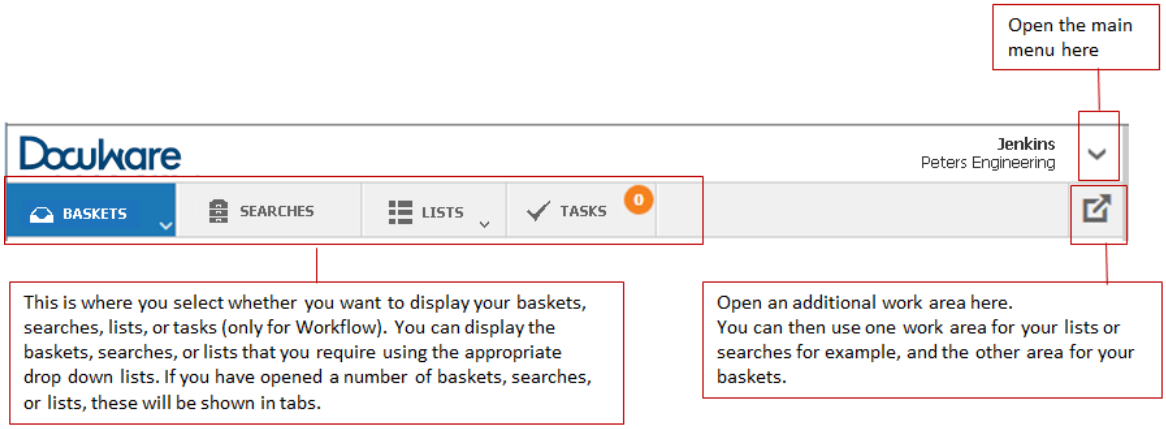
1.1 The New User Interface

The new DocuWare standard view is divided in two: on the left, baskets, search with result views, storage, and settings; and on the right, the viewer for displaying documents. Only the ***viewer in HTML5 mode*** (***http://help.docuware.com/en/#t58499***), which appeared with DocuWare version 6, is used as a viewer.



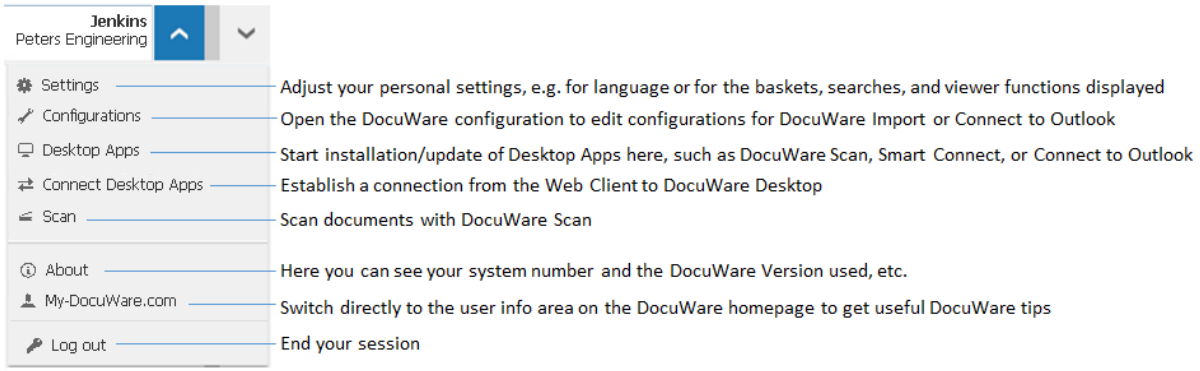
Main navigation

This can be found at the top left of the user interface and contains the following elements:



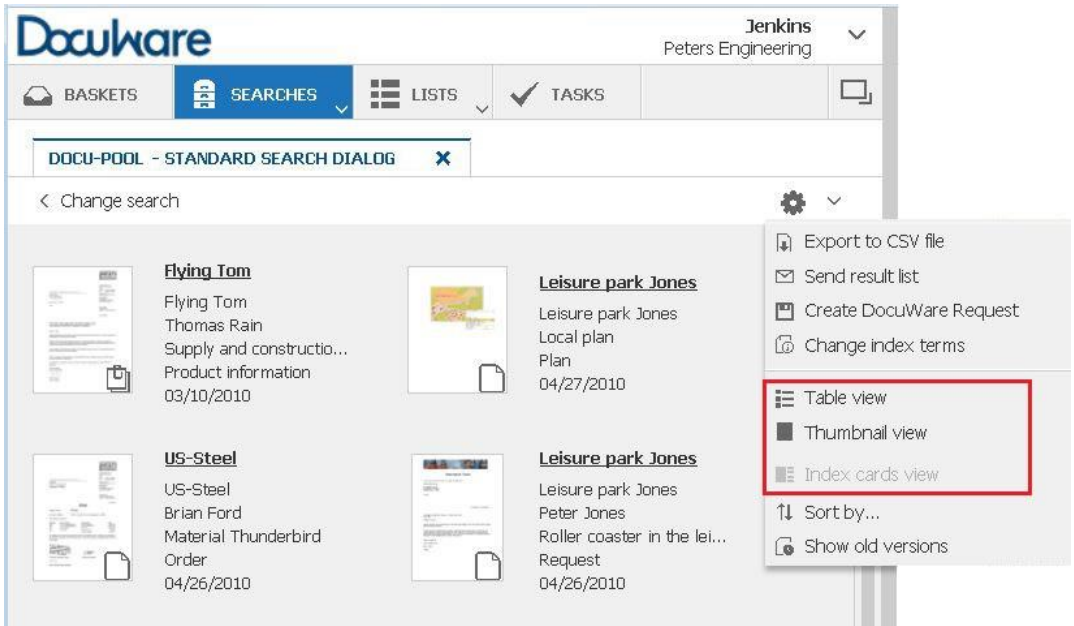
Main menu

The areas and functions described below are accessed through this menu.



Result view

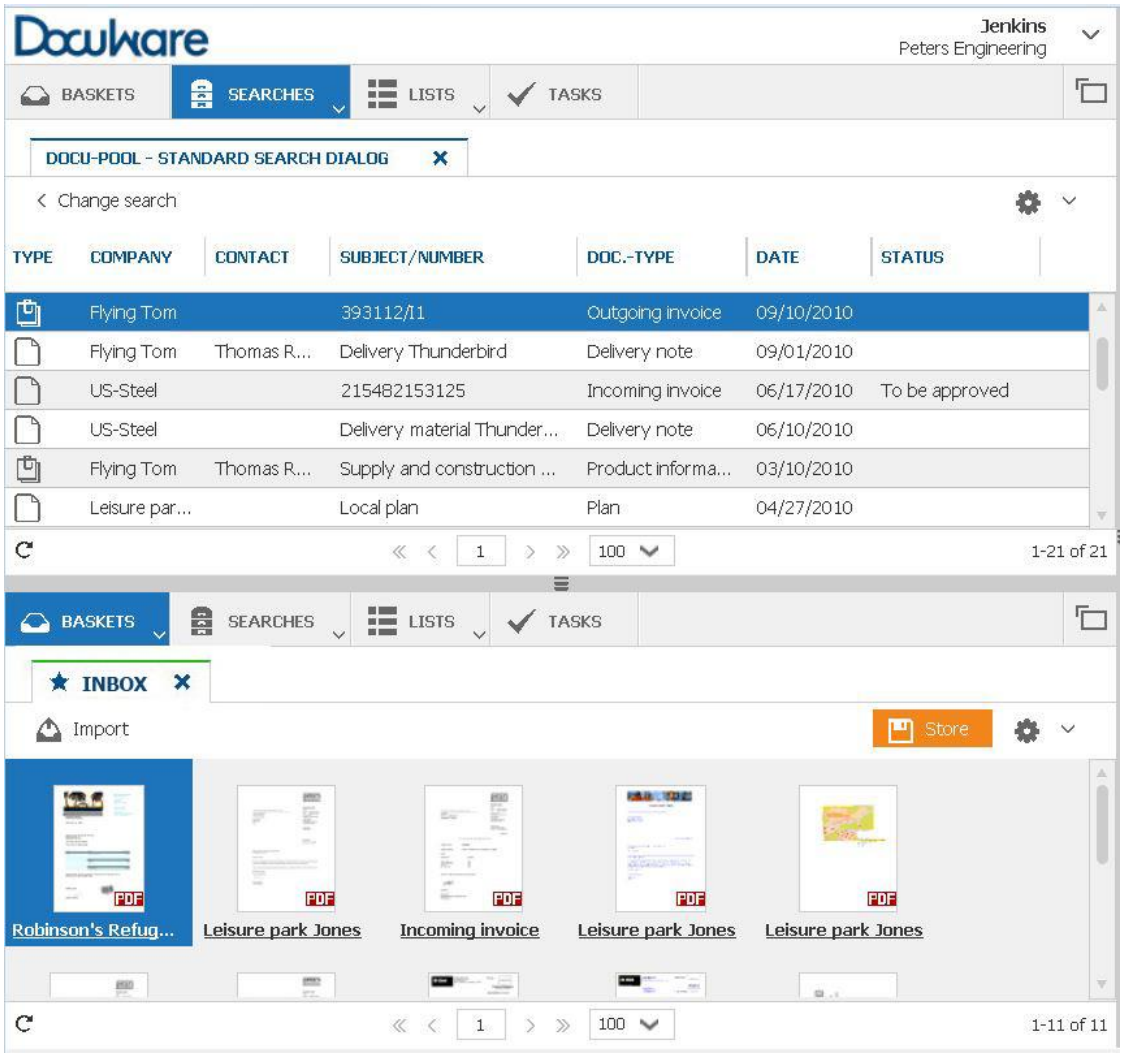
After searching, in addition to the usual table view, you can also display the documents found in thumbnail view or the new index card view – a combination of thumbnails and index information.



Double Work Area

If you want to see several elements, such as baskets, searches, or lists, at the same time, you can split the work area on the left side of the user interface.

Use to open a second work area, and use to close a work area.



Using two work areas that are independent from each other let you set up DocuWare according to your personal needs:

- Searches above, baskets below would be following the standard of the previous Web Client.
- Baskets top and bottom is a practical view if you work a lot with documents in several baskets. You can move or copy (hold down Ctrl key) documents completely intuitively with drag & drop.
- Having lists and baskets each in a separate work area is sensible if you scan documents in your basket on one hand, and receive documents to edit through lists on the other hand.

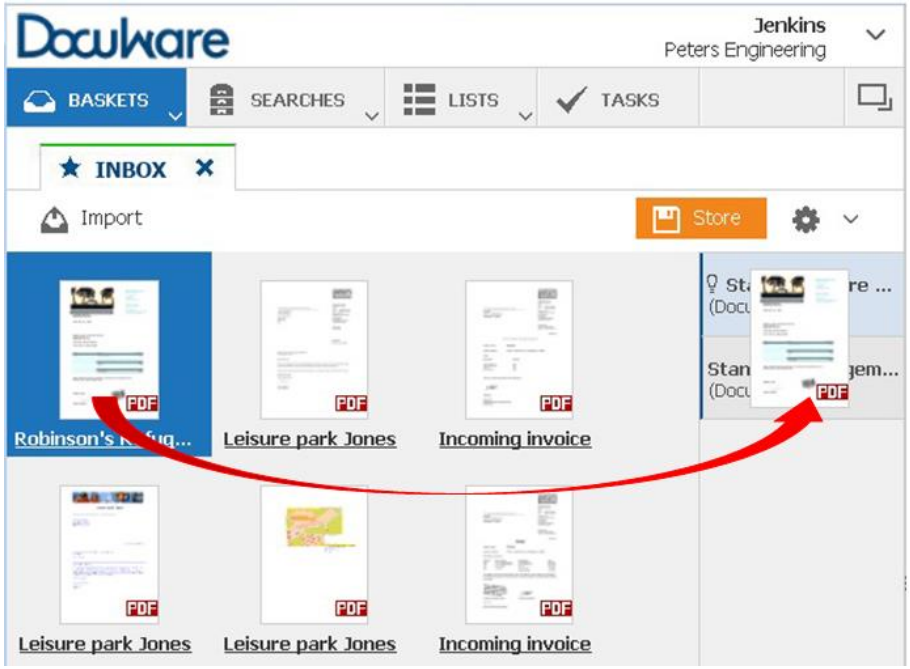
Give it a try and discover the best set up for your work areas.

Storing documents

Documents are stored as usual from the basket.

Simply select the document(s) and press the Store button. If you have only enabled one store dialog, this is immediately called up – otherwise, select the desired store dialog from the list that opens.

Alternatively, you can integrate the store dialog in the basket: *Settings* > *Always Show Store Dialogs.* With drag & drop you can now move the document to the desired store dialog.



In both cases, the new feature is that the store dialog is over the basket. Simply assign the index words – the easiest way is by clicking on the desired words in the displayed document. In other words, One Click Indexing. Thanks to this technology you can forget about laborious typing, typos, and transposed digits. One Click Indexing is enabled by default for storage. As soon as you have transferred a value to the store dialog, the next field in it becomes active. You can then click directly on the next value in the document and use it as an index word. If you want to transfer several words to a field, simply press and hold the Ctrl key.

1.2 New Options

In addition to the modern user interface and technology offered in Version 6.5, Web Client offers you the following new features:

- Index card view
  Use this display option in baskets and result views if you want to see both a thumbnail and the most important index data for the individual documents at the same time
- Different display options in result views
  For documents that are listed after searching in the result view, you can – as in the basket – choose from different display options: table view, thumbnail, and index card view.
  Choose for yourself which view you prefer to work with.
- Configure number format
  In *Settings* > *My Account*, you can change the country settings for the date and number format if the default settings transferred from the browser do not fit your needs.

Filtering of select list
You can now choose whether you want to filter the select lists or not. At the end of the select lists, enable/disable the filtering

.
Select lists without filtering contain all previously assigned index words.
If you filter, only those words that occur in combination with the words you already entered are displayed.
By default, the select list is unfiltered for storage, filtered for searching.

2 Storing Documents

2.1 Scanning and Storing

2.1.1 Mobile Document Scanner

Component: PaperScan

DocuWare PaperScan transforms your iPhone or iPad into a mobile document scanner. The app photographs documents and saves the scans in your Dropbox, or in the DocuWare basket. PaperScan scores well when it comes to image quality: with other scan apps, you need to change your hand position or use both hands to take a photo, and unfortunately the image is often blurred. PaperScan actually takes photos automatically. This guarantees sharp scans which are ideal for further processing with OCR or the Intelligent Indexing Service.

Application: Immediately share documents

PaperScan is useful, for example, to easily report expenses. Scan your hotel receipts directly after checking out and upload them to the Accounting basket. All your other expense documentation such as taxi fares, meals and parking receipts can be filed exactly the same way while traveling.

Benefits

- Clean image quality of scans
- Automatically crops the background
- Straightens the document (perspective correction)
- PaperScan is free
- No need to keep paper receipts
- Reduce risk of lost receipts resulting in lower reimbursements

How to use PaperScan

PaperScan can be downloaded free of charge from the ***Apple Store https://itunes.apple.com/en/app/paperscan/id670210933*** [additional QR code] and installed on an iPhone 4S, iPhone 5, or iPad. Start the app and point the camera at a document. The app takes the photo automatically. The PDFs can be uploaded to Dropbox or DocuWare at the push of a button. You can also email or message them to colleagues, friends and family.

As soon as the paper's edges have been detected, the app marks the document with a green frame and PaperScan takes the picture.

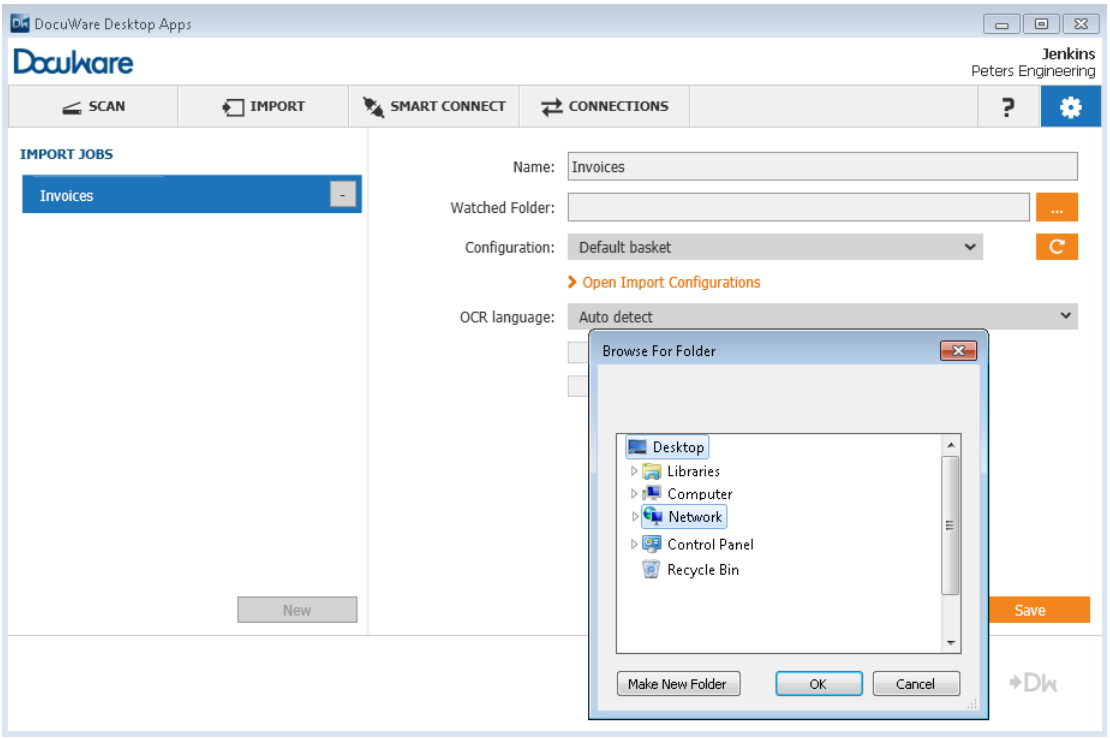
2.1.2 Importing Documents from Network Folder

Component: DocuWare Import App

You can now import your documents into DocuWare from any network folder.

Application: Scanning and importing invoices on the multifunction printer

Scan your account payables on the central multifunction printer in your office. The documents are stored in a monitored import folder on a server or in the network. Invoices are automatically imported into DocuWare from this folder.



In the Import App settings, select the network folder to be monitored.

Benefit

- Importing from the MFP becomes even easier when you use network folders.

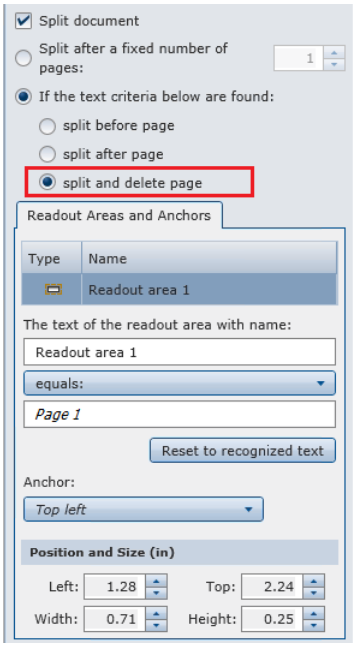
2.1.3 Deleting Separating Pages

Components: Import Configurations, DocuWare Scan and Import App

If you use separating pages to separate documents when scanning and importing, you can now delete them automatically.

Application: Deleting barcode pages for identifying invoices

Prior to scanning, if you inserted pages with a barcode to use as separators, you can now delete these separating pages automatically after importing.



Enable the option "Delete pages" in your import configuration.

Benefit

- No need to manually delete separating pages, save time.

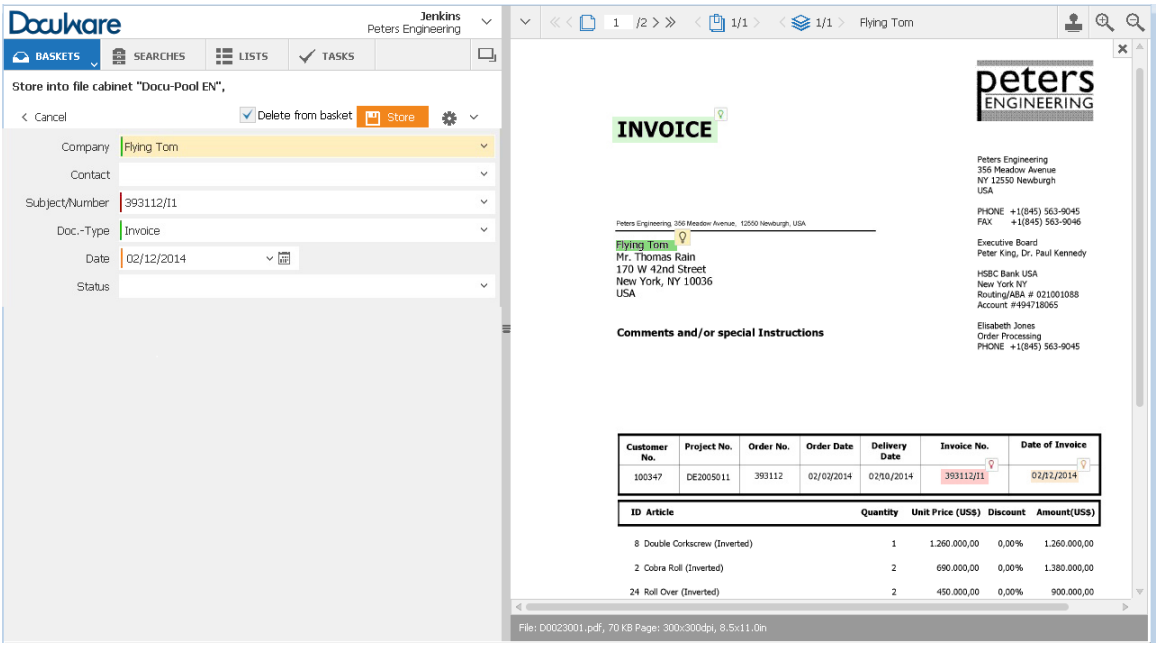
2.1.4 Easily Track the Index Suggestions of Intelligent Indexing

Component: Intelligent Indexing

If you store in the file cabinet a document that has been read by Intelligent Indexing , the suggested index words are now marked in the document in addition to being displayed in the store dialog.

Application: Checking index suggestions

When storing a document that you are using Intelligent Indexing to automatically populate the index field, you can quickly check the indexing as the index terms are marked on the displayed document. For example, you can see immediately whether the net amount or final total in an invoice is used as an index word.



The used index terms are highlighted on the document, corresponding to the color coding of Intelligent Indexing.

Benefits

- Easily track and check indexing
- Storing documents is more intuitive and user friendly

2.1.5 Custom Naming of Document Types

Component: Intelligent Indexing

Intelligent Indexing can now name your document types according to your company standard.

Application: Adapting document types to the company standard

In order to select the necessary documents for processing, Intelligent Indexing uses the document type that was automatically inserted as the index value. These other processes may expect other words than the ones that Intelligent Indexing suggests, e.g. "account payable" instead of "invoice (incoming)." So that these processes do not come to a standstill, you now have the option to freely select words for the document types. If Intelligent Indexing then identifies a document as "invoice (incoming)," the document is read as such, but "account payable" is used as the index word.

Benefits

- Automatic indexing, with company-specific words for the document types
- With Intelligent Indexing, indexed documents can be easily integrated into automated company processes.
- No need to manually change the index word for the document type

How to use the function

DocuWare-customer portal > *Service* > *My DocuWare* > *My Company* > *Contract* tab > area *Intelligent Indexing* > *Manage Document Types.* (To do this, you must be the DocuWare "SysAdmin" or "Key Contact" for your company or have the "License Download right.")

2.1.6 Comparing Intelligent Indexing Results with External Sources

Component: Intelligent Indexing

The results of Intelligent Indexing can be compared with existing data from other applications and filtered. This way you can combine automatic indexing with consistent data within your company.

Application: Using company names from your ERP system

You use Intelligent Indexing to automatically index your documents. For consistency, export a corresponding list from your ERP system and attach it to Intelligent Indexing using a field filter on the company name. When indexing, Intelligent Indexing searches for the company name in the document as usual, however, the system does not directly suggest it as an index word – instead it first looks in the list from the ERP system to see whether it contains this exact company name or a similar one. This is then suggested as an index word. The result is consistent data; different spellings are eliminated. This step makes further work with the documents easier, regardless of whether it is followed by a manual search or automated processes.

Benefits

- Automatic indexing together with consistent values throughout the different systems
- With Intelligent Indexing, indexed documents can be easily integrated into automated company processes.

How to use the function

DocuWare-customer portal > *Service* > *My DocuWare* > *My Company* > *Contract* tab > area *Intelligent Indexing* > *Manage Field Filter.* (To do this, you must be the DocuWare "SysAdmin" or "Key Contact" for your company or have the "License Download right.")

2.2 Printing and Storing

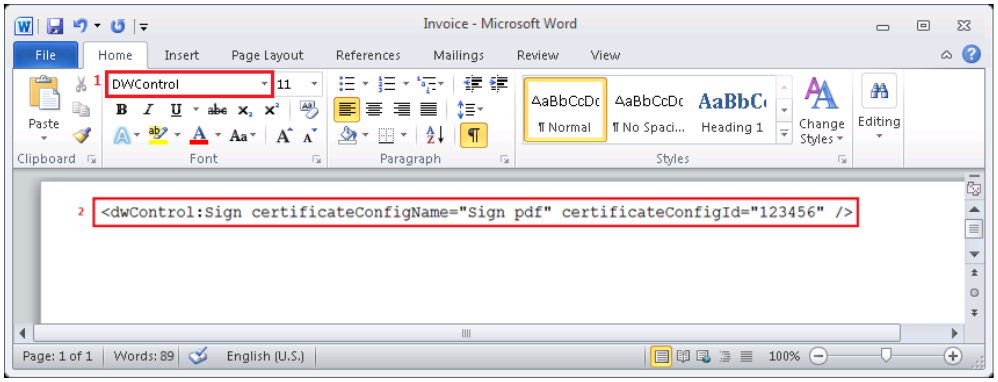
2.2.1 Electronic Signature with DocuWare Control

Component: DocuWare Printer

The DocuWare Control command "Sign" lets you initiate the signing of documents directly from your applications.

Application: Signing invoices

Do you use DocuWare Control to archive your outgoing invoices? Now you can also sign them electronically. Simply write the invisible text command "Sign" in the DocuWare Control font on your document template. DocuWare Printer then uses the signature setting from the specified configuration.



For templates, e.g. in MS Word, select "DWControl" from the font list (1) and write the text command – which will be invisible – in the document (2).

Benefit

- Control the signing of documents directly from your applications.

2.2.2 Replacing the Content of Readout Areas

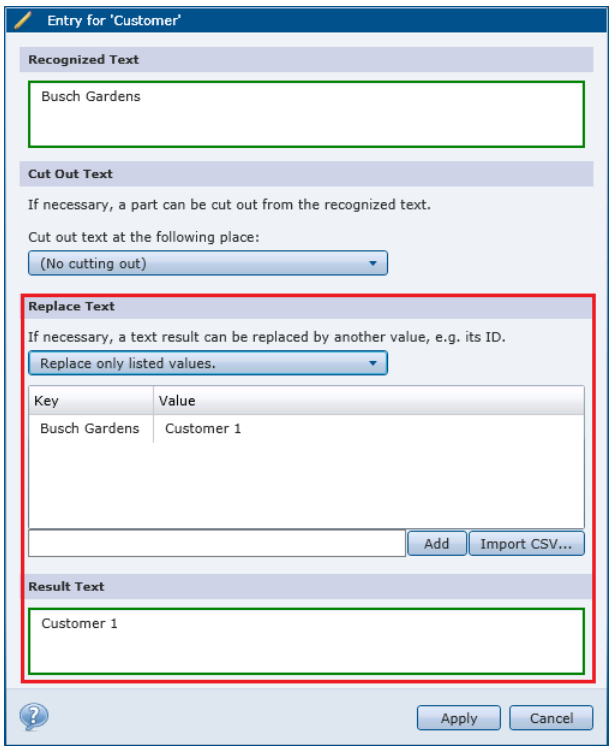
Component: DocuWare Printer

Read out text can now be replaced by other text.

Application: Printing and storing different document types with the correct indexing terms

From your ERP, you print documents that are to be indexed based on their different document types, for example: offer, invoice or delivery note. The documents bear the words "invoice," "offer," or "delivery note," accordingly, however, the index words for archiving should be "Invoice – Outgoing," "Offer – Outgoing," and "Delivery Note – Outgoing," so you replace these words using the new function.

How to use the function



On the "Indexing" page, you can replace read text by editing a field value.

Benefit

- Flexible approach when filling in index fields

2.3 Email Management

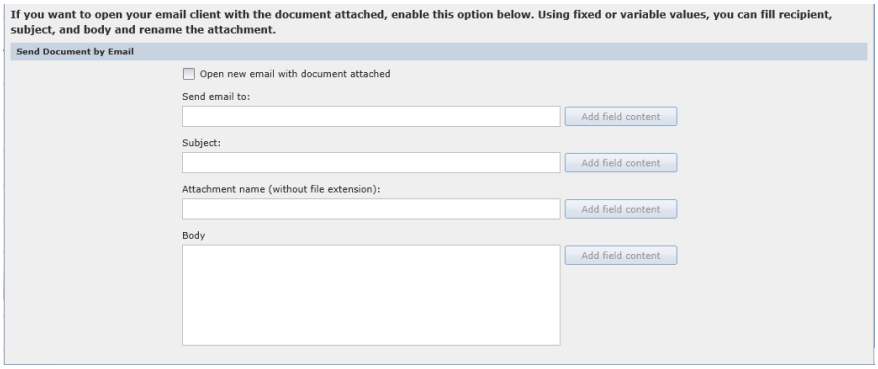
2.3.1 Automatically Attaching Edited Documents to Emails

Components: DocuWare Printer, DocuWare Scan, DocuWare Import, Import Configurations

No matter whether you create a document with DocuWare Printer, scan a document with DocuWare Scan, or import one with DocuWare Import, you can now automatically attach the document to a new email and send it as needed.

Application: Emailing electronic invoices

Do you have customers who want to receive their invoices electronically, or would you like to offer this service to your customers? It's easy, simply enable the option "Open new email with attached document" in the corresponding configuration and complete the fields Subject, To, etc. When you store an invoice to be emailed, your email client opens for immediate sending.



Configure the email in DocuWare Printer and in the import configurations under the "Processing" page.

Benefits

- Improved customer service with sending invoices electronically.
- Email Client opens automatically for quick and easy processing.

2.3.2 Accessing and Archiving Email from the Exchange Server

Component: Connect to Mail

Email can be accessed from a Microsoft Exchange Server with Connect to Mail. This applies to Microsoft Exchange Server 2007, 2010, and 2013. DocuWare uses Exchange Web Service (EWS) as the interface. Connect to Mail can also call up email from Exchange Servers that are secured by self-signed certificates.

Application: Centrally archive business email

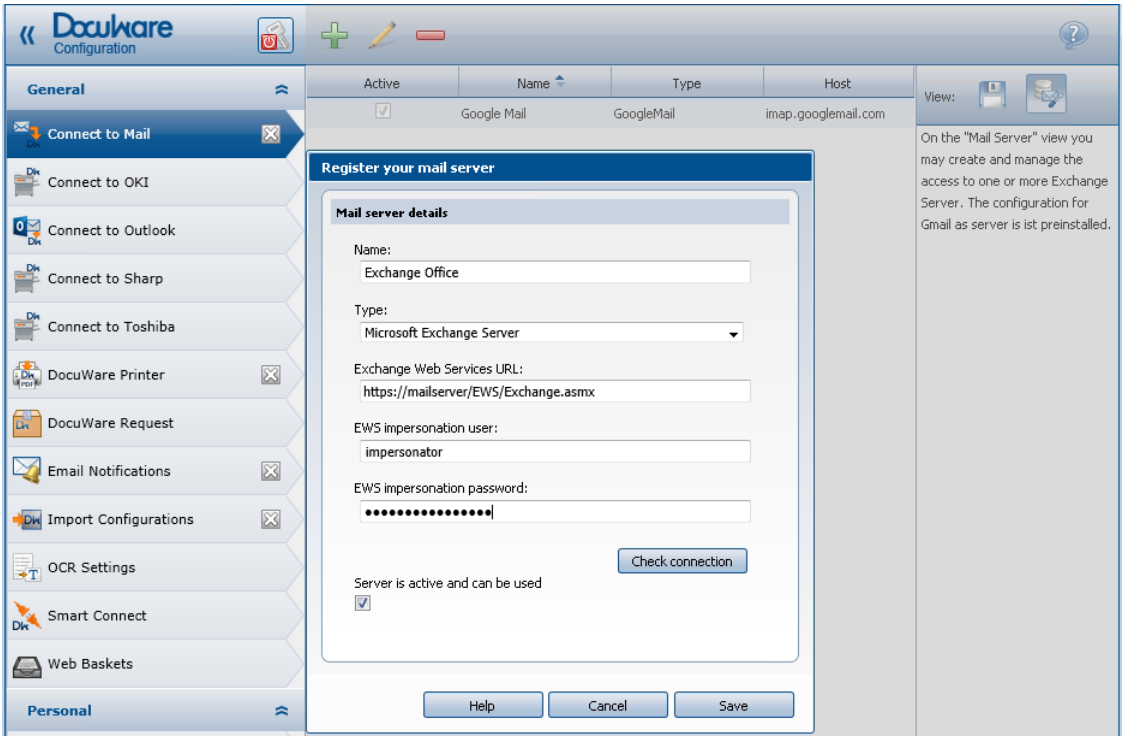
If your office processes its email correspondence through Office 365, Connect to Mail can call up the email directly from the server and store them in a DocuWare file cabinet or a basket. An additional client is not needed for archiving.

Benefits

- Connect to Mail runs as a service automatically in the background, no manual access is required.
- Email can be archived in DocuWare regardless of the operating system used.
- The personal password for the email account is not saved.

How to use the function

First, the administrator defines access to the Exchange Server. To do so, they create a new mail server in the DocuWare configuration. The Exchange access rights are defined through what is known as the Impersonation user. The advantage of this is that the personal access details for the Exchange Server do not have to be saved.



You can define access to the Exchange Server in the DocuWare configuration *in the* General *area*.

Once the connection to the Exchange Server is set up, any authorized user can define their personal access and link their email account with a storage configuration.

In the Personal *area, users enter their own access details for the Exchange account.*

2.3.3 Saving Email in a Basket with Connect to Mail

Components: Connect to Mail, Web Client

Connect to Mail can now store email in a DocuWare basket. This gives you the option to index an email using Intelligent Indexing. You can also collect associated email in a basket and then staple them to a DocuWare document.

Application: Faster indexing in the basket

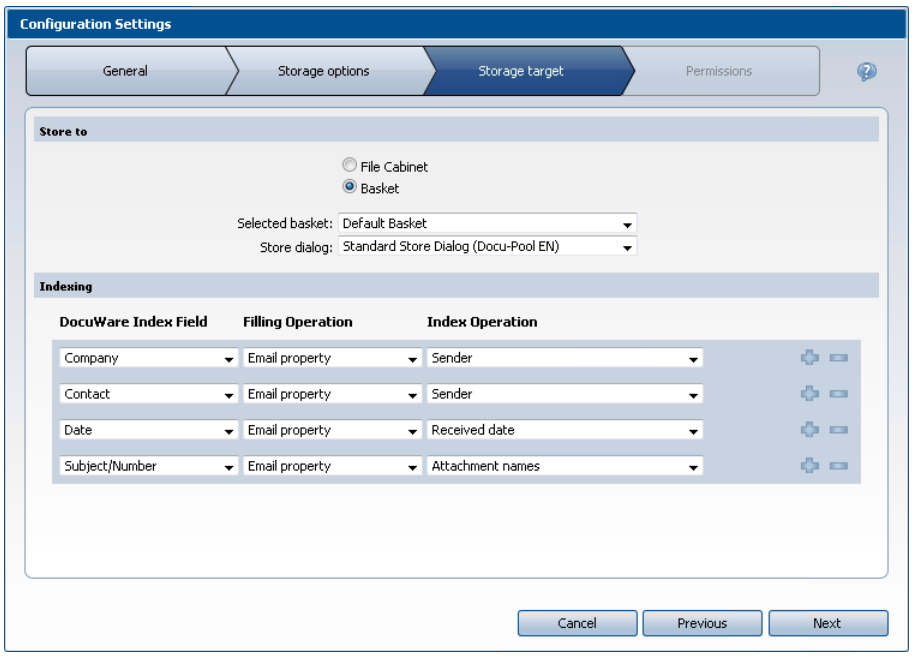
Invoices from your Gmail or Exchange Server account are stored in a basket for which Intelligent Indexing is enabled. The Intelligent Indexing Service assigns the index words automatically in the background. This way invoices or other documents such as delivery notes can be indexed and stored without wasting time typing.

Benefits

- Convenient indexing of email
- No entry errors
- Central storage for all email
- Email can be summarized into one DocuWare document in the basket

How to use the function

Set up a storage configuration for Connect to Mail in the DocuWare configuration and select the desired basket under *Store Target*. This storage configuration is linked to your Gmail or Exchange Server account in the *Personal > For Connect to Mail* area. The email can then be stored from this account into the basket.



In the DocuWare configuration, you can store a new storage configuration under General*, with a basket as the* Store Target*. You can also define a store dialog for indexing here.*

3 Workflow – Control Complex Business Processes Professionally

3.1 Assigning Data – New Activity

Component: Workflow Designer

You can now assign data directly in your workflows, and perform calculations that do not require any action from a user.

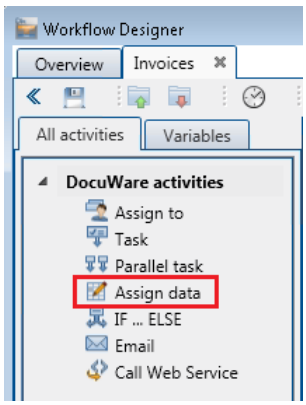
Application: Integrating information from an accounting system in the workflow

Information is retrieved from an accounting system through a Web Service, and transferred to the workflow (see ***Calling up a Web Service – New Activity*** (on page 22)). Once this information is transferred it is combined with that from the workflow, and a decision is made on the basis of the result. Either the workflow can make this decision itself, or the result is shown to the user to make a decision.

Benefit

- Running more processes automatically.

How to set up the function



To assign data, select the variable, entry type, and entry.

3.2 Calling up the Web Service – New Activity

Component: Workflow Manager

With the "Call up Web Service" activity, you can now read external data in order to use it in your organization's workflows.

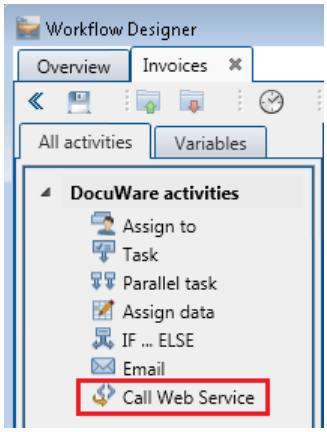
Application: Enter invoice amounts directly in the form for a task

Do you want to automatically enter the invoice amount in the form for a task in your account payable workflow? No problem with the new activity: the workflow sends the barcode number to the accounting system via Web Service, and receives the invoice amount in return.

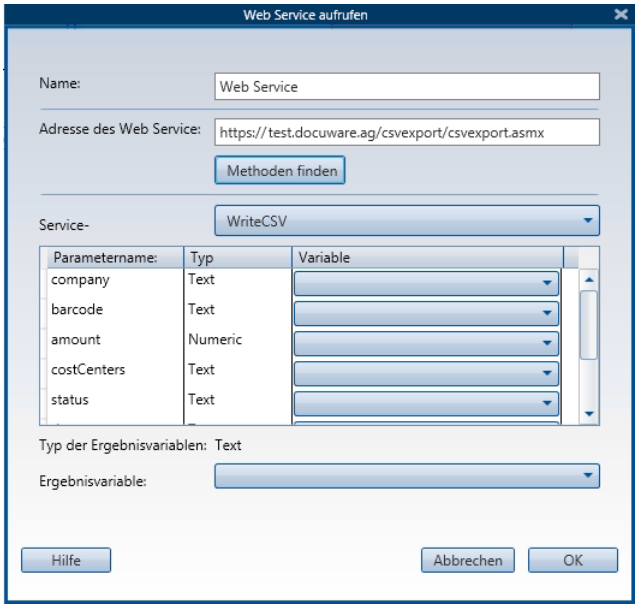
Benefits

- You can use information from other systems in the workflow.
- This allows you to customize DocuWare to your organization's needs with even greater precision.

How to set up the function



Move the "Call up Web Service" activity from the list into your workflow in Workflow Designer.



Click "Find Methods" to load the service methods and you can make the exact settings.

4 Additional New Features and Improvements

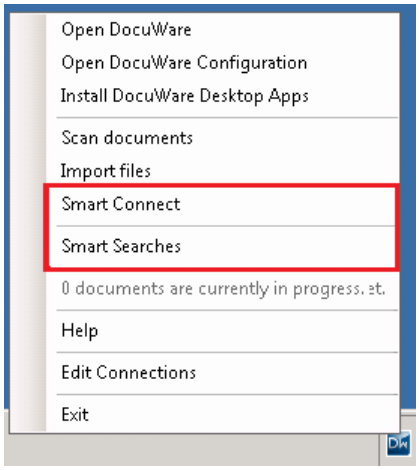
4.1 Modified System Requirements

- Windows XP and Windows Server 2003 are no longer supported
- Windows 8.1 is supported but not for DocuWare Windows Client

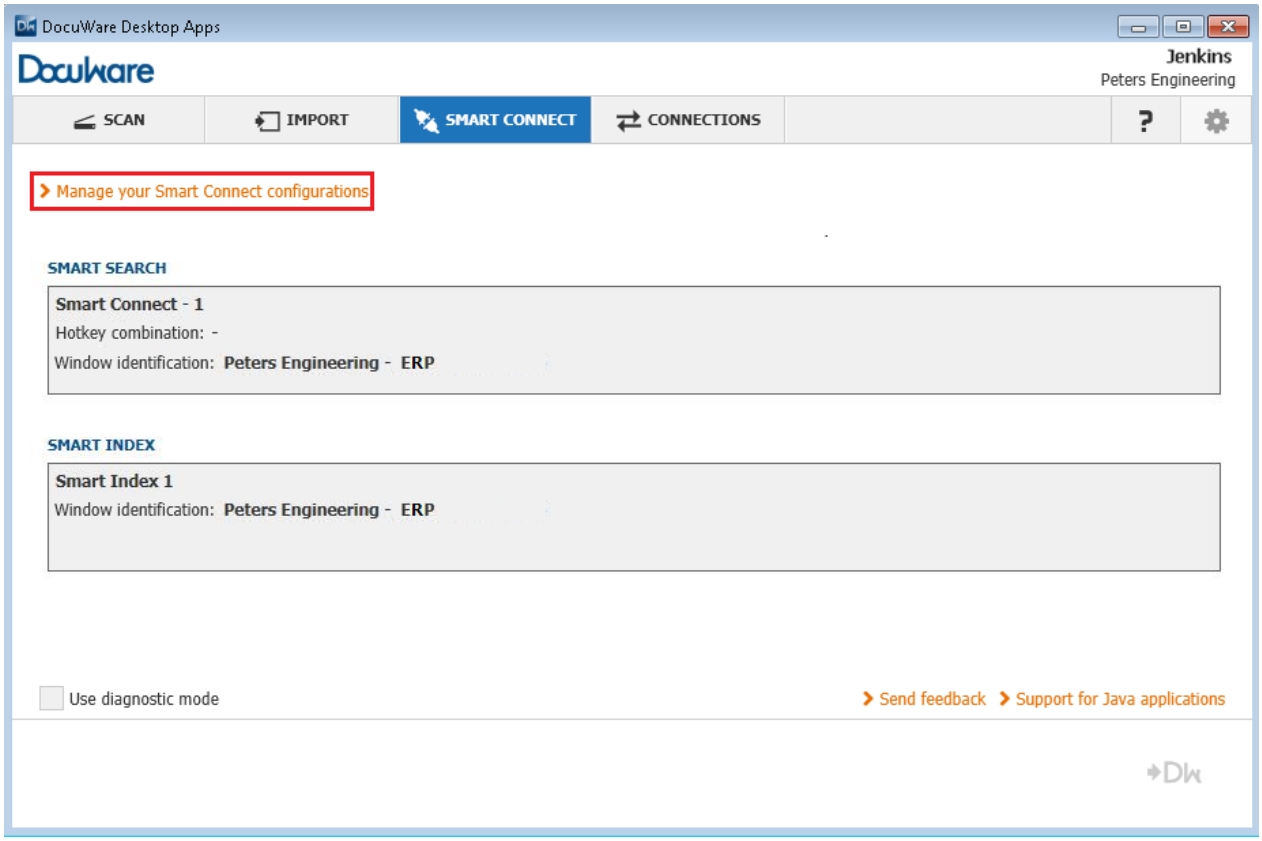
4.2 Smart Connect in DocuWare Desktop Apps

Component: Smart Connect

Smart Connect is now part of the DocuWare Desktop Apps.



You can now access Smart Connect and your Smart Searches through the DocuWare Desktop Apps tray menu.



Your Smart Searches and Smart Index queries are more clearly displayed in the Smart Connect app. You can also access your Smart Connect configurations directly from here.

Benefits

- Smart Connect is displayed more clearly and easier to access.
- Optimized interface.

4.3 Smart Connect: Automatic Tool Kit Selection

Component: Smart Connect

The technology for reading out text in screenshots is now selected automatically. You only have to manually select a technology if Smart Connect does not recognize an application rendering it impossible to determine the optimum technology.

Benefit

- Capture a window directly – without first having to manually determine the technology.

4.4 DocuWare Mobile in Even More Languages

Component: DocuWare Mobile

The app DocuWare Mobile for Windows 8 Modern UI is also available in Spanish, French, Italian, and Portuguese, as well as German and English.

4.5 DocuWare Mobile for Blackberries with Touchscreen

Component: DocuWare Mobile

DocuWare Mobile can now be used on smartphones with Blackberry 10 and touchscreen. This makes operation easier. The current Android versions now run even faster with the new, web-based version of the Mobile App.

4.6 DocuWare Includes Microsoft SharePoint 2013

Component: Connect to SharePoint 2013

You can archive documents from the latest SharePoint version, Microsoft SharePoint 2013, in DocuWare, and search in DocuWare file cabinets.

4.7 Managing DocuWare

Component: DocuWare Administration

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

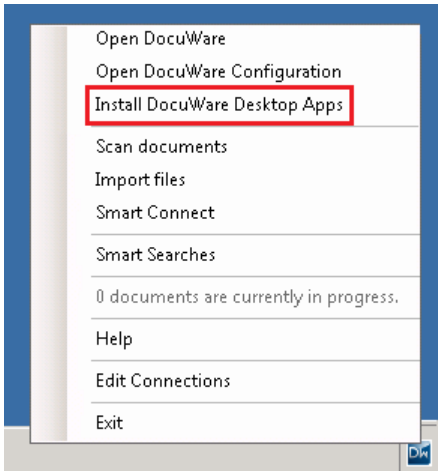
- The Web Client is managed under *System* > *Web connections* > *General* > *HTTP root directory*. You no longer have to create a Web instance at organization level for the Web Client. You can now set the passphrase, that is a character-sequence, for an encrypted URL to the Web Client under *Organization* > *General* > *Web Access*. In addition, all organizations now have an identification number, which is displayed under *Organization* > *General*. This is important, for example, for URL integration.
- When creating a new user, you have the option of immediately setting up a default basket for the user. The basket is available for the new user in the Web Client when they first start it up. The default basket is set up in the user wizard.
- The load distribution is now simpler on the Content Server. With the new function *Assign all Content Servers*, a file cabinet will be served by a Content Server that is added at a later date.
- In the *Reset Fulltext* dialog in the file cabinet area, documents can be specifically filtered for new indexing through a store dialog. The reset can apply to the complete fulltext, or only the text shots, or only documents that have not yet been edited.
- The new design of the status dialog shows the status of the fulltext catalog reset. Documents that are added to the file cabinet during new indexing are also included in the status display.

4.8 Usability Improvements

4.8.1 Installing DocuWare Desktop Apps Directly

Component: DocuWare Desktop Apps

DocuWare Desktop Apps can now be install and uninstalled separately. In addition, they can now be installed from the DocuWare Desktop Apps context menu by right-clicking on the tray icon of DocuWare Desktop Apps in the status bar.



In the context menu, click "Install DocuWare Desktop Apps" and go to Setup where you can install the components as usual.

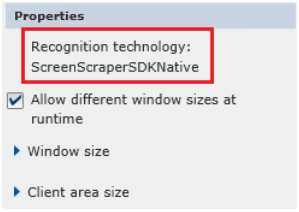
Benefits

- Greater flexibility when using individual apps.
- Faster to uninstall DocuWare Desktop Apps.

4.8.2 Recognition Technology Is Automatically Selected

Components: Smart Connect

If the third-party application used for Smart Connect is known to DocuWare, the recognition technology for reading out text is now automatically selected.



The recognition technology used is displayed to you on the "Capture Window" page under "Properties" in the Smart Connect configurations.

Benefit

- Configure Smart Connect quicker and more easily.

4.8.3 Further Improvement to DocuWare Desktop Apps

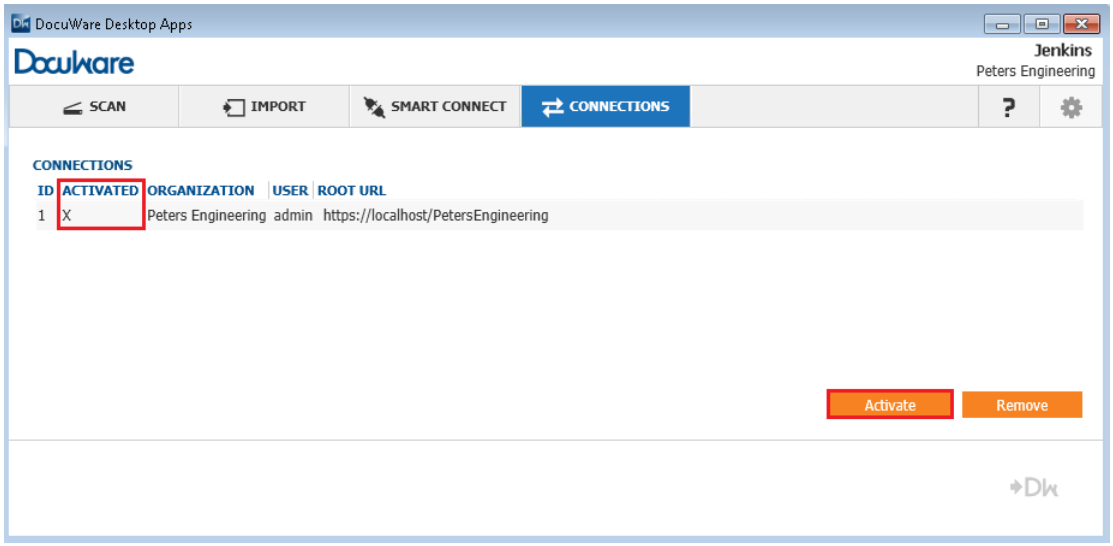
Component: DocuWare Scan App

The button *Each sheet as a new document* is now located under *Scan Settings*.

4.8.4 Enable Connection in DocuWare Desktop Apps

Components: DocuWare Desktop Apps

Your connection is now displayed to you on the *Connections* page instead of in the top section of DocuWare Desktop Apps as it was previously.

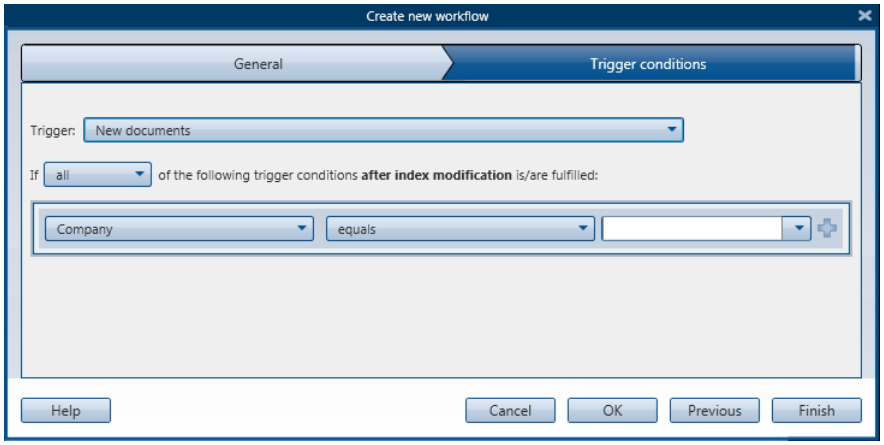


If you click the *Enable* button, the connection is displayed to you in the list as *Enabled*.

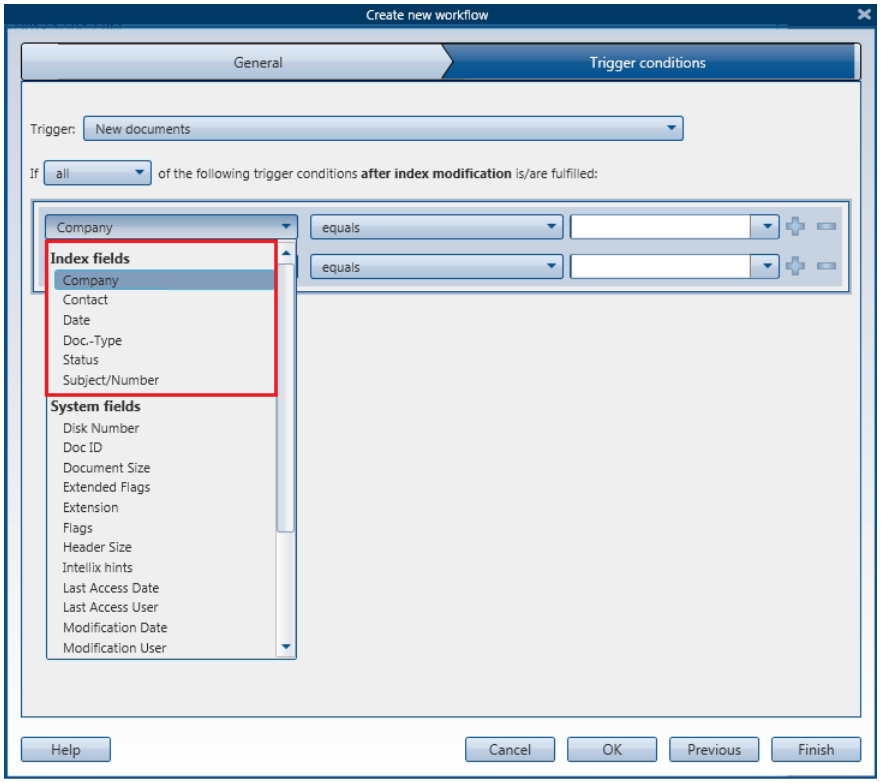
4.8.5 Finding Index Fields for Workflows Even Faster

Component: Workflow Manager

The dialog for creating a workflow has been split into two pages for an improved overview. When you configure the trigger conditions for a workflow, you will now find the index fields even faster through the new organization of the list.



The higher-level settings are made on the General *page.*



Trigger conditions are set on the Trigger conditions *page – the index fields are at the top of the list.*

Benefit

- Work even faster with workflows.

4.8.6 New Options When Naming Workflows

Component: Workflow Manager

If you set up workflows for different organizations, you can now give them identical names. You can also rename an already created workflow.

4.8.7 Always Stay Logged in

Component: Connect to Outlook

A login to Connect to Outlook remains active even if the computer is re-enabled from energy-saving mode or stand-by. You do not need to enter the login details again.