

Use

- Mail documents in response to customer queries at the click of a button
- Mail only the parts or pages of a document needed

Your benefits

- Time-saving and convenience when sending documents or parts of documents
- Better service: process customer queries even faster
- Make DocuWare documents available to users who don't have a DocuWare installation
- PDF conversion allows any recipient to read and print files easily

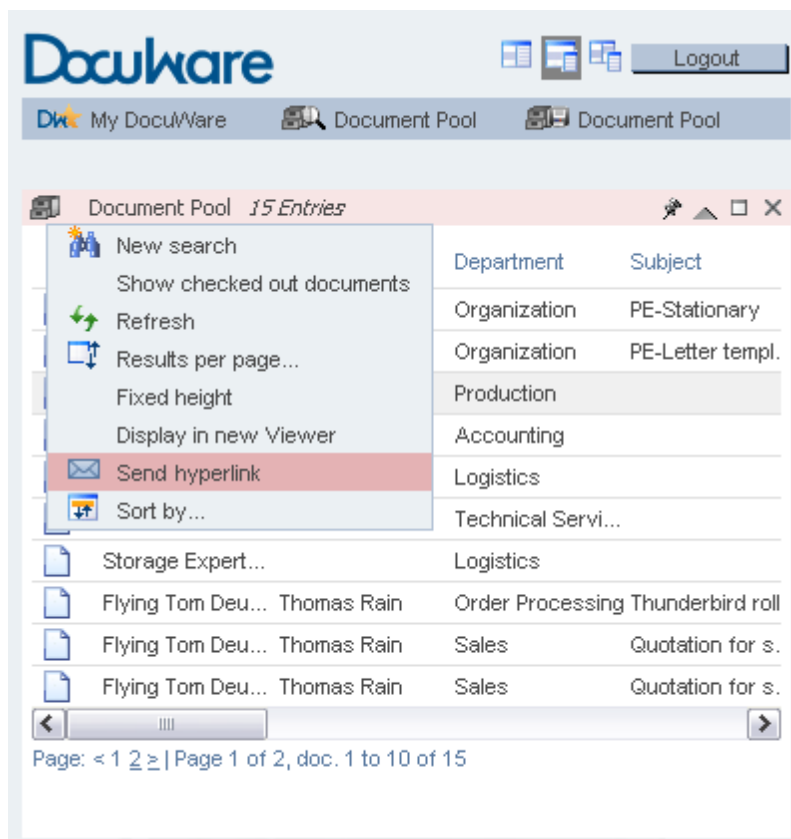
Use the option

- In result or task lists: via context menu in a document (whole document only)
- In the Viewer: by clicking the Send icon on the toolbar (whole document, current file or current page)

1.2 Send hyperlink to document or result list by e-mail

When communicating with people who have access to the same DocuWare system as you do, rather than sending them a document by e-mail you can now just send them a link to this document. You can even send the hyperlink to a whole result list or task list at the click of a button. This also sends the query that was used to generate the list. It also means that the contents of the list may have been dynamically updated by the time the recipient opens the hyperlink.

The mail functionality requires a Simple MAPI-based e-mail system on the client, such as Microsoft Outlook or Thunderbird.



Sending a hyperlink to the result list by e-mail

Use

- Send links to archived documents in internal communications
- Send sets of documents to interested user groups
- Save hyperlink for future use

Your benefits

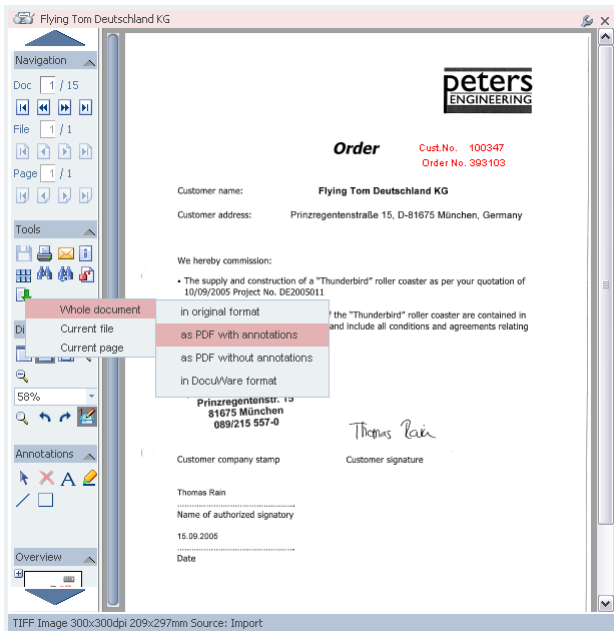
- The document remains in the file cabinet, no new versions are created
- Hyperlink means the recipient always uses the latest version
- Quick and convenient link to archived documents
- Reduces traffic on the mail server

Use the option

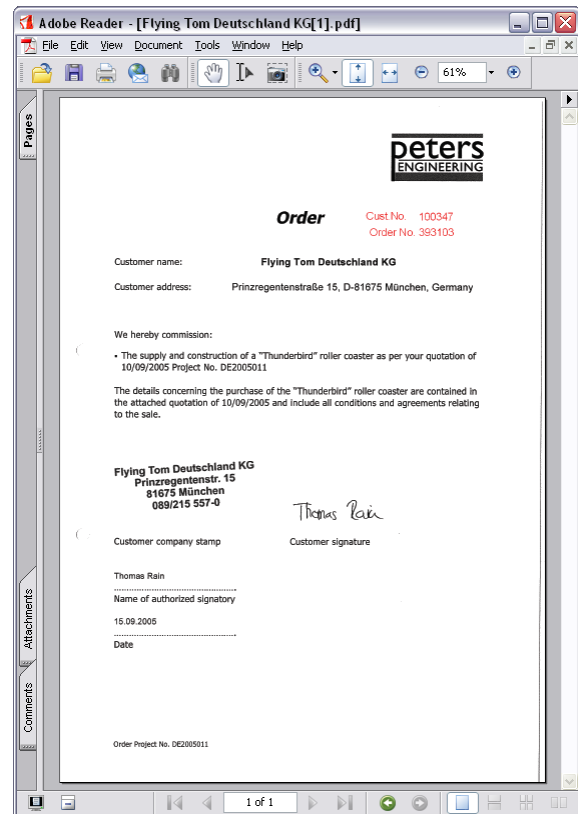
- In the result list: via the context menu in the result list for a link to the whole list, or via the context menu on a list entry for a link to that document
- In the Viewer: via the Send icon on the toolbar

1.3 Download documents

Make use of the enhanced document download options: you can now download documents not only as a DocuWare document, but also as an original file or as PDF. With the PDF format you can also choose whether or not to include in the PDF file any annotations and stamps that may have been applied to the document in the DocuWare Viewer.



*Download document from the Viewer, here as PDF with markups.
On the right, the PDF in Adobe Reader.*



Use

- Send documents from DocuWare in PDF file format, when this file format is requested.
- Combine documents consisting of different files (e.g. e-mail with attachments) in a compact PDF file.

Your benefits

- Make DocuWare documents available to users who don't have a DocuWare installation
- Convert DocuWare documents to a standard format at the click of a button

Use the option

- In the result list: via the context menu in a document (whole document only)
- In the Viewer: by clicking the Download icon on the toolbar (whole document, current file or current page)

1.4 Display documents fit to width without white margins

The familiar *Fit to width* display option now removes the white margins around a document, thus making optimum use of the display area in the Viewer. The document is displayed that much larger and is easier to read, without taking up any more space on screen. With scanned documents the margin is only removed if it is completely white, i.e. it doesn't contain any dirty marks. The previous display method is now available as an additional option called *Fit to width with margins*.

Use

The improved display option is particularly useful when displaying the following documents, as it presents the relevant page contents in the optimum size:

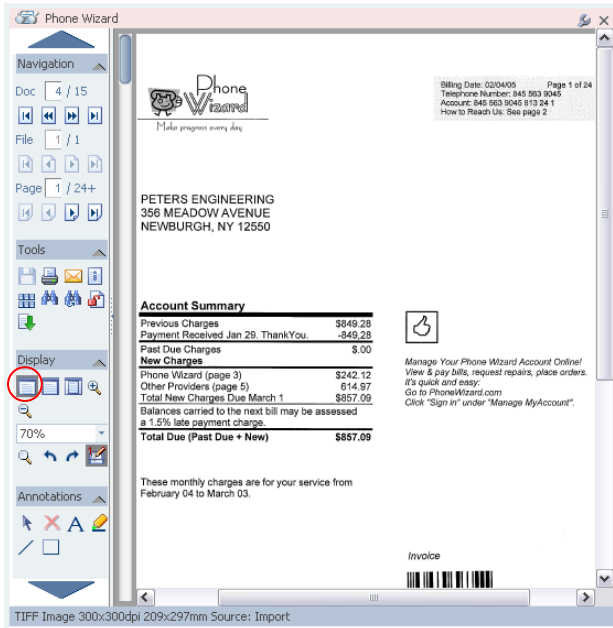
- Word documents
- PDF documents
- e-mails
- Documents created with COLD or TIFFMAKER
- Documents scanned carefully

Your benefits

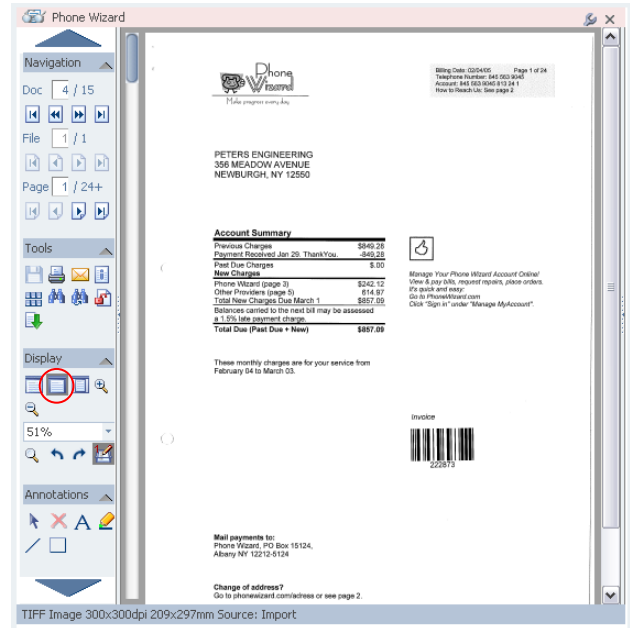
- Documents are easier to read
- Optimum use of screen area

Use the option

- Default mode in which documents are opened
- Button on toolbar in the Viewer
- Button for *Fit to width with margins* is enabled in the Viewer settings



Document in the new Fit to width display option. The text area is considerably enlarged.



Document in the usual Fit to width with margins display option.

1.5 Quick input option for date

Use

You want to enter today's date in a search or store dialog. As on the Windows client, simply press the x key in a date field. Then use the - and + and < and > keys to scroll through the dates one day at a time.

Your benefit

Convenient date input option via the keyboard

Use the option

In any date field of the search and store dialogs and in the info boxes

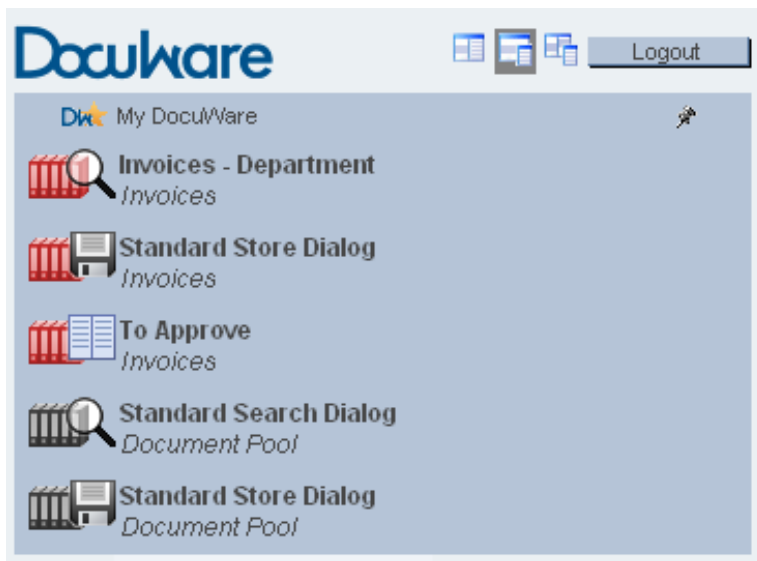
1.6 Large menu bars

The menu bars for search and store dialogs and task lists are now displayed one under the other as wide bars. Another really useful thing: as well as the dialog name, they now contain the file cabinet name as well. When you open a dialog, the entire menu block shrinks back to its previous familiar size to make space for the dialogs. But as soon as you close all dialogs again, i.e. search dialogs, result lists, etc., the menu block is restored to its larger size.

This new appearance is now standard. However, you can continue working exclusively with the small menu bars as before.

Use

If you find the current icons for file cabinet dialogs too small or you are missing the file cabinet names, then choose the new large icons with file cabinet names.



Large menu bars

Your benefit

More user-friendly thanks to better visibility

Use the option

The administrator decides which icons will be used for the file cabinet dialogs: always small, always large, or as decided by the user. In the latter case users see the large icons when they open the Web Client. This area can then be pinned: this retains the large icons, even when file cabinet dialogs such as the search or store dialog are opened. If the toolbar is not pinned, for reasons of space it is displayed with small icons.

For new Web instances: In the wizard in the *Appearance* dialog

For existing Web instances: DocuWare Administration > Organization > *General* > *Web Instances* > *Appearance*

1.7 Buttons for new file cabinet dialogs immediately on Favorites menu

If the file cabinet administrator has added a file cabinet dialog to the Web instance you use and you have the right to use this dialog, it will be displayed immediately on your Favorites menu. Previously you would have had to enable the new dialogs in "My DocuWare".

Use

You immediately see when a new store dialog or a new task list is available to you.

Your benefits

- You always have an up-to-date Favorites menu with the dialogs available to you
- The administrator does not have to inform all users involved when new dialogs are added

Use the option

This is standard behavior as from Service Pack 2 and does not need to be specially enabled.

1.8 Web Client in separate browser window

With this option the Web Client opens in a new browser window that contains neither the menu bar nor the navigation bar. The size and position of this window is unrelated to the actual browser window and is saved when you close the window. If the document viewer is also opened in a separate window, its use is similar to the main window and Viewer on the DocuWare Windows client.

Use

Regardless of other browser applications, the Web Client and the Viewer always open in the same place and in the same size. This allows the screen to be divided up so that DocuWare and the corresponding programs (financial accounting, word processing, etc.) are always placed in an ideal position to one another.

Your benefits

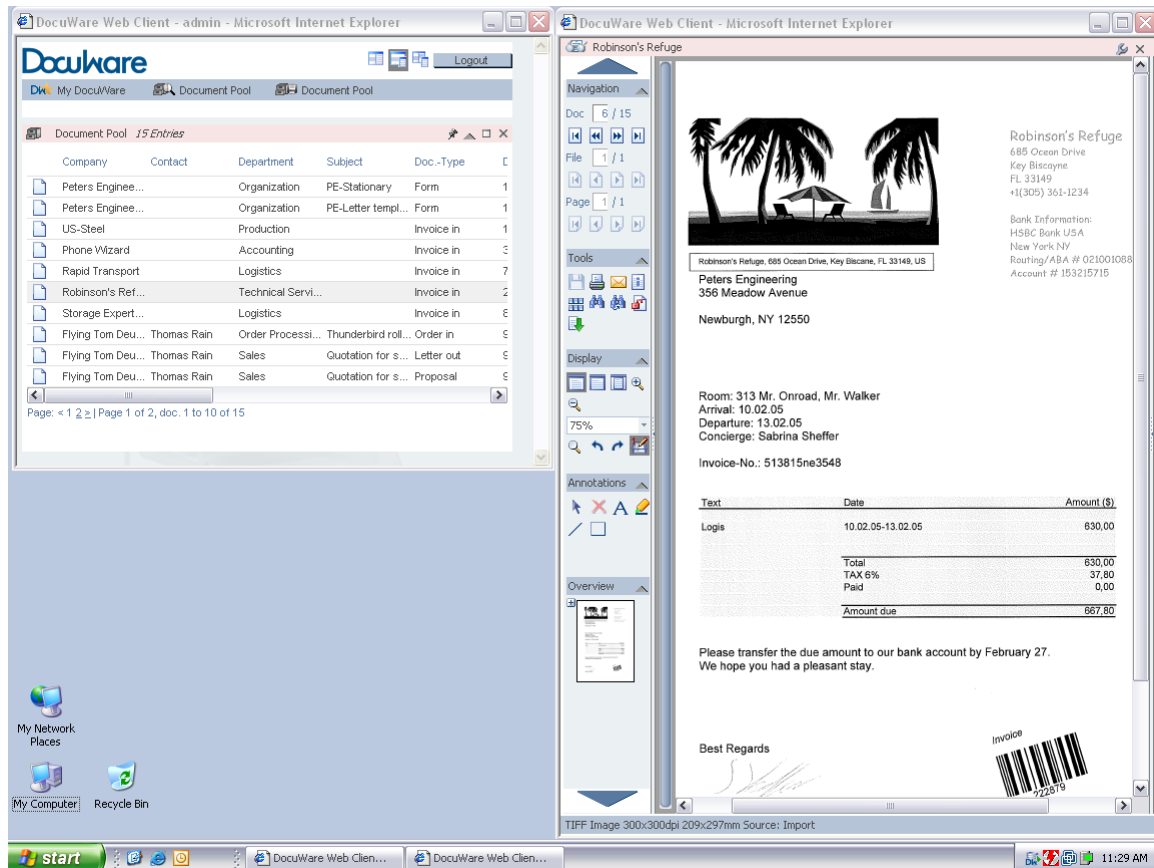
- Work faster as you no longer have to reposition browser windows
- Better clarity and optimum use of screen area

Use the option

The administrator decides whether this option can be used: always, never, or as decided by the user. In the latter case users can enable or disable the option via the *My DocuWare > Customization* option.

For new Web instances: In the wizard in the *Appearance* dialog

For existing Web instances: DocuWare Administration > Organization > *General > Web Instances > Appearance*



Web Client in separate browser windows without menu bars, making optimum use of screen area even when using other applications

1.9 Number of results in title of task lists and result lists

The title bar of result lists and task lists now also shows the number of results.

Use

You have pinned a task list because you use it a lot, but it is minimized for reasons of space. When you open the Web Client you can immediately see how many entries your task list contains.

Your benefits

- More clarity
- See number of results even when task list is minimized

Use the new feature

In the title bar of result lists and task lists

1.10 Checksum control

Immediately you display a document, two icons on the title bar of the Viewer show you whether or not this is the original version of the document. This feature, familiar from the Windows client, can now also be used on the Web Client.

Use

With the aid of checksum control you can be sure that a file scanned with DocuWare has not been manipulated on its way to the file cabinet or through subsequent interference in the system.

Your benefit

Security

Use the option

- Enable the option on the toolbar in the Viewer
- Display the result of the checksum control on the title bar in the Viewer

1.11 Edit DocuWare password on Web Client

If you want to change your DocuWare password, you can now do this not only as before in DocuWare Administration, but also on the Web Client.

Your benefits

- If you are a DocuWare user but you have no DocuWare client installation, and you work exclusively with the Web Client, you can now change your DocuWare password yourself
- You can change your DocuWare password in the application you normally work with; there is no need to open DocuWare Administration, which as a user you may not be very familiar with.

Use the new feature

In *My DocuWare* dialog > *Change Password* tab

2 Web Client: Integrations

2.1 Immediately display first document in result list

For integrations also you can define that the first document in a result list or task list is immediately displayed in the Viewer. Unlike the Viewer integration on its own, the result/task list is presented to the user in addition to the Viewer.

Use

You want a document always to be displayed immediately to users of the integration, for example the most recent or the one that needs processing most urgently. But users should also be able to view all other documents in the result or task list.

Your benefits

- If the result list only contains one document, the user of the integration does not have to click on this document to open it as it is immediately opened in the Viewer
- Users of the integration always see a document displayed, for example the most recent in their sorted result list or the most urgent from their task list

Use the option

DocuWare Administration > at the level of the task or result list > *List View Properties* category.

2.2 URL integration with encrypted URL

When parts of the Web Client are integrated in other applications, the URL used to call up the integration can be encrypted.

Use

- You are using an integration that uses neither a guest login to DocuWare nor Single Sign-on or manual input of the login by the user. In that case the DocuWare access details, i.e. the user name and password, must be contained in the URL. To prevent these access details from being used for another purpose, you can encrypt the URL.
- With the URL you are sending a search query to DocuWare with which a user can only access very specific documents, for example their own salary statements or the invoices that you issued to a customer. The search query contains the user's personnel number or the customer number. By encrypting these you prevent technically savvy users from "intercepting" the URL and gaining access to documents they are not authorized to see.

Your benefit

More security when integrated with other applications

Use the option

For new Web instances: In the wizard in the *Integration Settings* dialog
For existing Web instances: DocuWare Administration > Organization > *General* > *Web Instances* > *Integration* > *General*. This is where the code with which the URL will be encrypted is defined.

2.3 Login with URL integration

If you use parts of the Web Client in a URL integration with personal login (i.e. not via a guest login), the trusted login is tried first using the Windows ID. If this does not work, the DocuWare Login page opens, on which users can authenticate themselves with the DocuWare login.

Use

- A partner network (extranet) contains a URL integration. Since the individual partners have different Windows domains, a Trusted Login using the Windows ID is not possible. But with the DocuWare login the various partners can log into DocuWare individually.
- A URL integration uses Single Sign-on within the company network. If a user is outside the company network and wants to access documents from their private PC via the URL integration on the Web Client, they now can, by simply entering their DocuWare user name and password at the automatic prompt.

Your benefit

Allows integration with personal login if the Windows login cannot be accessed.

Use the option

This is standard behavior as from Service Pack 2 and does not need to be specially enabled.

3 Administration

3.1 Changes to fulltext

3.1.1 Reset fulltext

DocuWare allows you to reset the fulltext at three different levels:

- Catalog and tree structure
- Catalog, tree structure, and index tables
- Catalog, tree structure, index tables and text extracts

Use

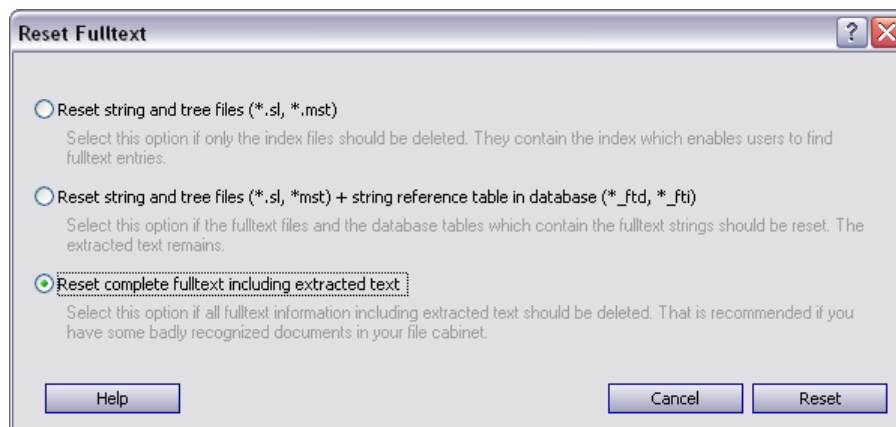
If your fulltext catalog has grown full of unnecessary information, for example as the result of incorrectly reading music files, images, or videos, you can reset the fulltext catalog and the other fulltext elements and create a new one.

Your benefit

Better performance after purging the fulltext catalog

To select the option

In DocuWare-Administration, at file cabinet level / *General / Options* category / *Fulltext support*



Dialog for resetting the fulltext catalog

3.1.2 Filter documents to be read

You can now filter the documents from which to read text for the fulltext catalog: either directly by document ID (DocID) or by number of most recent documents.

Use

The first time you create the fulltext catalog, or after resetting it, you can build it sequentially. For example, you can index the more recent documents first, thereby making them available for the fulltext search even before the complete index has been built.

Your benefit

Faster productive use of the fulltext especially with large file cabinets

To select the option

In DocuWare Administration at the level of the selected fulltext workflow > *Filter* section or in the *Filter* dialog of the wizard when creating a new workflow.

3.1.3 Optimized text extraction from PDF documents

PDF files are created in different ways. New algorithms for extracting text, especially from PDF files produced by scanning, guarantee better results for fulltext indexing.

Your benefits

- Higher quality of extracted text – better results from fulltext search
- Faster text extraction
- The text in PDF files can be extracted even if it is contained in the PDF not as text but as a graphic (these PDF files are sometimes created by scanning)

To select the option

This is available as standard from Service Pack 2.

3.2 Changes to AUTOINDEX

You can modify all the settings of an AUTOINDEX workflow after it has been set up.

Use

- If the type of external data source, the data source itself or the file cabinet containing data to be indexed has changed, you can now adapt the existing workflow accordingly. You can also change the iterator, for example.
- If you need two very similar workflows, you can copy the first one and then make your changes to the copy. You don't have to recreate the entire configuration.

Your benefit

Significant time-saving for you as administrator, as you don't have to recreate AUTOINDEX workflows if you simply change the conditions for the workflow

To select the option

In DocuWare Administration, at the level of the AUTOINDEX workflow > select *Edit AUTOINDEX Workflow* from the context menu. The workflow opens in the wizard along with its settings. Make your changes there.

3.3 Web instance: HTTP address can be modified afterwards

You can now change the HTTP address of a Web instance even after it has been created.

Use

If you change the connection to the Web instance to SSL from outside DocuWare, you can adapt the HTTP address within the Web instance.

Your benefit

Time-saving and added convenience for the administrator, as there is no need to create a new Web instance merely because the HTTP address has changed.

Use the option

DocuWare Administration > Organization > *General* > *Web Instances* > [Web instance] > *Target category*

3.4 Assign file cabinets to Web instances directly at creation

Use

When you create a new file cabinet, you can specify directly in the wizard the Web instances in which the file cabinet should be available.

Your benefit

Create file cabinets and publish them on the Web Client in a single step = added convenience and more time saved for you as file cabinet administrator

To select the option

DocuWare Administration > in the *Create File Cabinet* wizard > *Assign to Web Instances* dialog

3.5 New features for system settings backup and restore

You back up system settings, for example all data connections, storage locations for documents and all user administration settings, in an XML file. You can mail this for service purposes and import it into another system.

The new features are:

- The restore is now released for live systems.
- Database independence: the database of the system into which the restore is imported can be of a different type from the one in the system from which the backup was generated.

Use

- System settings can be backed up at any time and restored when necessary, for example after problems with the database
- Transferring the DocuWare system settings to another database
- Converting the database
- Preparing the system settings in a test system
- Changing the type of database for the system settings (MS SQL, MySQL, Oracle)

Your benefits

- Added security thanks to restore option
- Quick and easy transfer of system settings to another database or database type
- Easily convert a test system into a live system, even with a different database type

To create a backup

Via *DocuWare Administration > DocuWare System > Backup*
or *DocuWare Administration > Tools menu > Backup System Settings*

To run a restore

Via *DocuWare Administration > menu Tools > Restore System Settings*.

3.6 Logging

3.6.1 Logging at debug level for DocuWare system

Using a menu command you can choose to enable logging at debug level for the whole DocuWare system or only for certain elements such as Content Server or DocuWare Administration.

Use

In support cases, the administrator can create a detailed log of the DocuWare system. These log files can help technical support to identify the problem more quickly.

Your benefit

Higher satisfaction levels, as support cases are resolved more speedily.

To select the option

DocuWare Administration > Local menu > System Debug Logging

3.6.2 Import logging files

Logging files in XML format that were created since DocuWare 5.1b Service Pack 2 can be reimported and displayed in the DocuWare logging dialog.

Use

In the event of a problem the administrator or Support can display logging files in an easily readable format. The sort and filter functions help to find problems more easily.

Your benefits

- Contents of logging files are displayed in a clearer format
- Logging entries can be sorted and filtered
- Support cases are processed more speedily

To select the option

DocuWare Administration > Local menu > Load Logging File

3.6.3 Dialog for displaying logging files expanded

You can expand the dialog used to display logging files if necessary. You can then read the full contents of each logging entry under the table of logging entries.

Use

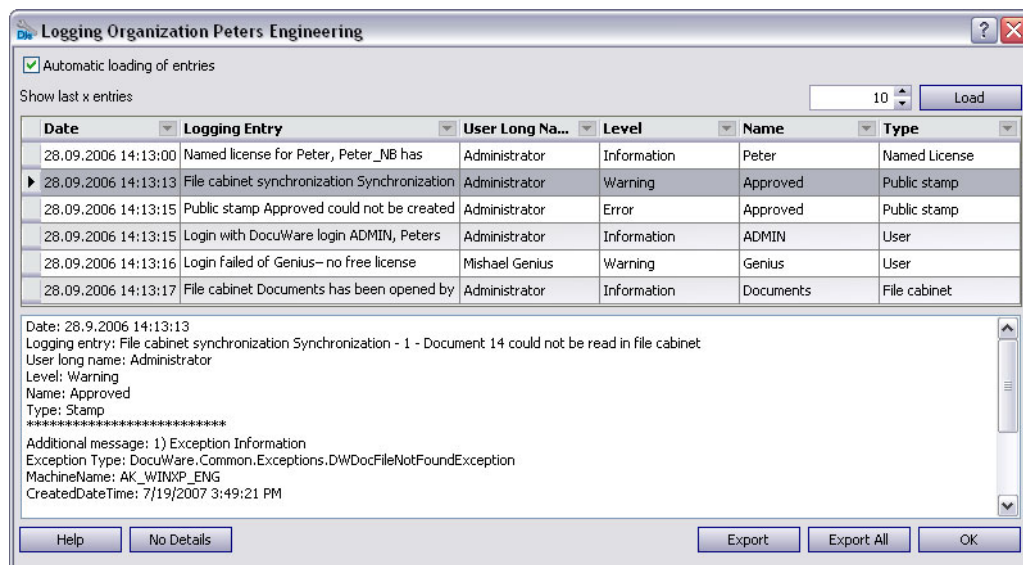
You want to know the details of a logging entry: Instead of opening the logging file in a separate program and searching for the relevant place in the file, you can now simply expand the dialog and the full logging entry is displayed.

Your benefits

- Easy and transparent working with logging files
- Faster problem resolution

To select the option

In the dialog for displaying logging files > *Details / No Details* button



Expanded logging dialog

3.6.4 Advanced logging for the Web Client

In addition to the existing Web Client logging, which contains the access activity, you can also log details about the session. You can also monitor the performance of the application.

Use

Monitoring

Your benefit

Easier performance optimization

To select the option

In the *DWWebClient.settings* file. For details see the technical reference tecdoc.pdf.

3.7 Predefined view for baskets

As administrator you can define in particular for centralized baskets, the mode in which a basket should initially be displayed for each user: *List*, *List and Info*, *Thumbnail* or *Thumbnail and Info*. The users to whom this basket is assigned will initially therefore all use the same view, although they can change it individually.

Use the option

The value is set in the Basket.ini of each basket. For details see the technical reference tecdoc.pdf.

3.8 Central baskets cannot be deregistered

Baskets that are centrally administered and assigned to individual users can no longer be deregistered by the respective users.

Use the option

This is standard behavior as from Service Pack 2 and does not need to be specially enabled.

4 Modules

4.1 CONNECT to SharePoint

CONNECT to SharePoint integrates Microsoft Office SharePoint with the DocuWare integrated document management system. SharePoint users have an ideal solution for storing documents directly from SharePoint and lightening the load on their libraries.

Your benefits

- Audit-compliant archiving of all SharePoint documents
- Lightens the load on the SharePoint database and improves the performance of the SharePoint portal
- Store and access archived documents directly from SharePoint
- More user-friendly thanks to easy connection and flexible customization

4.2 CONNECT to Notes

Starting with Service Pack 2, Lotus Notes documents can be filed in DocuWare as PDFs, as well as in original and RTF formats. Storing in PDF format provides both extra comfort and security since the Notes document structure is preserved and documents can only be read and not altered in PDF. This feature does not require a special PDF printer driver or any other software.

Manual archiving in PDF via Lotus Notes client is free of charge and does not require any additional licensing (aside from the regular DocuWare license). A license key (at a fee) for the PDF converter is required for storing in PDF format via automatic, server-based archiving.

4.3 Advanced logging for ACTIVE IMPORT

There are now two levels of logging available for ACTIVE IMPORT: Normal and Debug. A general logging file is also created which logs the individual jobs.

At debug level for example, a logging entry is created when a RECOGNITION template is opened during an ACTIVE IMPORT job or when RECOGNITION creates several new documents by splitting a document.

Your benefits

- Improved error tracking
- Faster help in support events

Use the option

In ACTIVE IMPORT > *Options* menu > *Logging Settings*

4.4 Logging in RECOGNITION

RECOGNITION log files are now created with the same format and structure as those of ACTIVE IMPORT. This provides better coverage of problems that arise during interaction of the two modules.

Your benefits

- Improved error tracking
- Faster help in support cases

Using logging

In a RECOGNITION template > *Options* dialog > *Logging* area

4.5 REQUEST documents on USB sticks or external hard disks

Documents that you wish to use with DocuWare REQUEST can now also be stored on USB sticks or external hard disks.

Your benefit

More types of storage media can be used.

Use the option

No special settings are required.