

What's new in DocuWare version 7.10

Features, use cases and benefits for users

Contents

1.	For day-to-day work with DocuWare.	3
1.1	Simplified scrolling to browse through documents.	3
1.2	Table calculations in DocuWare Forms.	3
1.3	Import and processing of any XML documents.	5
1.4	Display Spanish and Polish XML invoices legibly.	6
1.5	Sign documents with multiple sections via Validated ID.	7
2.	Integrations.	8
2.1	DocuWare Outlook Add-in.	8
2.2	Integrate DocuWare lists into Microsoft Teams.	9
2.3	DocuWare storageRobot.	10
2.4	DocuWare docXporter.	11
3.	Security.	13
3.1	Authorization of all DocuWare components via oAuth2.	13
3.2	Checksum with new encryption algorithm.	13
3.3	Even more security for webhooks and web services communication.	14
4.	Workflow management.	15
4.1	Requests: Status is displayed in list.	15
4.2	More workflow history options.	15
4.3	Even designers can monitor and stop workflow instances.	16
4.4	More convenient method for REST web services.	16
4.5	Web services: Additional endpoints and query parameters.	17
5.	Configuration and settings.	20
5.1	Size limit for forms and attachments.	20
5.2	Mandatory or read-only as options for entire index tables.	20
5.3	File cabinets as source for select lists	21
5.4	Functional right: View all users.	22
5.5	Assign user licenses more easily.	23
5.6	Export: New file encoding format.	23
6.	Technical information.	25
6.1	Modified system requirements.	25
6.2	Further Documents for Version 7.10.	25
6.3	Update to Version 7.10.	25

1 For day-to-day work with DocuWare

1.1 Simplified scrolling to browse through documents

Component: DocuWare Viewer

Starting with this DocuWare version, you can easily navigate through your documents using the mouse wheel. Whether it's a multi-page PDF as a document or a document consisting of several files, such as a PDF, a Word file and two JPEG graphics: Intuitively scroll from one page to the next, even across file boundaries.

In addition, if a document page is not fully displayed in the viewer, it can be panned.



Applications

- Read through multi-page documents
- Browse through complex documents consisting of several files



Benefits

- Work intuitively and click less
- No difference when navigating between pages of a document and files of a document
- Needed page section quickly and easily at a glance



Here's how

The function is available directly in the viewer without any further settings. To pan, hold the right mouse button and drag.

1.2 Table calculations in DocuWare Forms

Component: DocuWare Forms

To better meet accounting needs, Forms has introduced a complete table calculation feature. Form designers can not only perform calculations between numeric columns within a table, but can also sum columns across multiple tables and use other numeric fields in the form and fixed values to create a formula.

Travel expense report

Name **Email**

Departure Date

Return Date

Number of Days

Destination

Travel Details

4 rows

<input type="checkbox"/>	Date	Reason	Cost center	Unit Price	Quantity	Total Price
<input type="checkbox"/>	28/11/2023	Hotel	12345-Travel expense-hotel	90	2	180
<input type="checkbox"/>	28/11/2023	Business Dinner	12346-Travel expense-meal	380	1	380
<input type="checkbox"/>	29/11/2023	Lunch	12346-Travel expense-meal	25	1	25
<input type="checkbox"/>	29/11/2023	Team Dinner	12346-Travel expense-meal	200	1	200

2023 Mileage reimbursement rate: 0.7 Euro per mile

Mileage

2 rows

<input type="checkbox"/>	From	To	Cost Center	Quantity (Mile)	Total (Euro)
<input type="checkbox"/>	Germering	Stuttgart	12348-Travel expen...	133	93.1
<input type="checkbox"/>	Stuttgart	Germering	12348-Travel expen...	133	93.1

Reimbursement Items Total

Mileage Total

Total to Claim

Travel expense form: All numbers in the grayed fields are calculated automatically based on formulas

Applications

- Travel expense form: Calculate mileage reimbursement and sum it up with other expenses from the business trip.
- Purchase request form: sum up the costs of the required items entered in a table.
- Order form: sum up the costs of the ordered items entered in a table, multiply with the tax percentage and add delivery fees.

Benefits

- Calculations are performed automatically, eliminating the possibility of human errors and saving valuable staff time
- Calculation results are already displayed when filling the form
- Faster further processing since the calculated values can be used as index entries

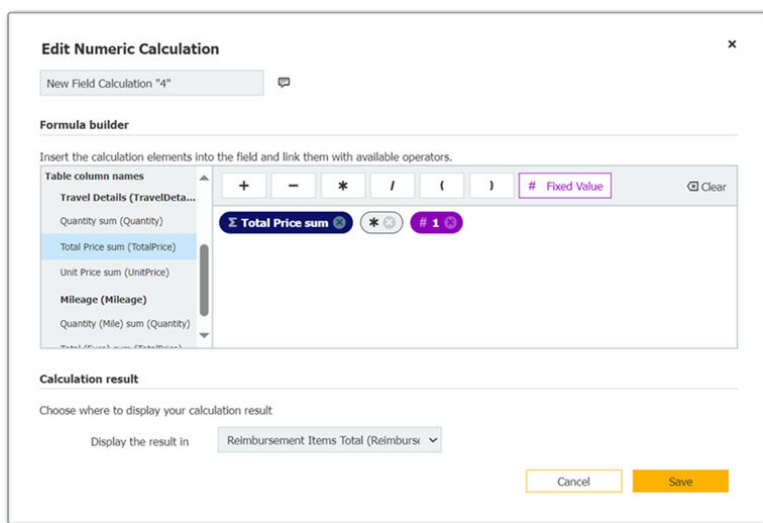
 Here's how

In a first step, set up all essential table columns and numeric fields on the form. In the Field Calculation dialog, click "Add new," then choose "Table calculation" or "Form Calculation" depending on your needs.

In a **table calculation** formula, you can use table columns from one table and fixed values. The calculation result can be displayed in that table. Use this calculation type, for example, to sum up all entries of a table column.

With a **form calculation** formula, you can create totals of numeric columns across multiple tables and also use other numeric fields of the form as well as fixed values. The result can be displayed in the designated numeric field and be used for indexing.

Independent of the type, you arrange your formula by dragging and dropping the elements into the designated formula space.



The drag & drop formula builder interface

1.3 Import and processing of any XML documents

Component: Import

DocuWare can now import any XML document and read its data automatically. The XML file no longer has to follow a specific syntax.

Applications

- Invoice and purchase-to-pay processes with invoices in any XML invoice standard
- Automatically read and process delivery bills and orders in XML format and use them in workflows as required

Benefits

- Process all document types in XML format
- Process all XML invoice standards
- Automate purchase-to-pay processes that are based on XML
- Avoid input errors completely by automatically using XML metadata

Here's how

In DocuWare Configuration, upload a suitable XML file as a sample document in the "Document Processing" area. Under "Processing", the metadata of the XML file and thus all the necessary information of the document is displayed in a table view. Select the desired data and link it to the DocuWare index fields.

1.4 Display Spanish and Polish XML invoices legibly

Component: DocuWare Viewer

Spanish XML invoices according to the FACTURAE standard and Polish XML invoices according to the standard used by the KSEF authority can now also be displayed legibly to the human eye.

Benefit

- Enables visual invoice inspections

Here's how

The image shows a side-by-side comparison of XML data and its visual representation. On the left, a snippet of XML code is displayed, including invoice totals and item details. On the right, a screenshot of the DocuWare Viewer shows a rendered Spanish invoice form with fields for sender and receiver information, tax details, and a summary table.

When you open XML invoices in the document tray or file cabinet, a readable form (right) is automatically created from the XML code (left).

1.5 Sign documents with multiple sections via Validated ID

Component: DocuWare Signature Service

With Validated ID, you can now also sign documents with multiple files.

Application

- Your contract consists of two PDF files, a service description and a data protection agreement. With the new option, the contract with all its components can be signed by the business partner.

Benefit

- More flexibility with signatures

Here's how

The signer signs each file individually. A document with 5 files therefore requires 5 signatures, which are also counted individually.

This function is available within the DocuWare Signature Service with every DocuWare version.

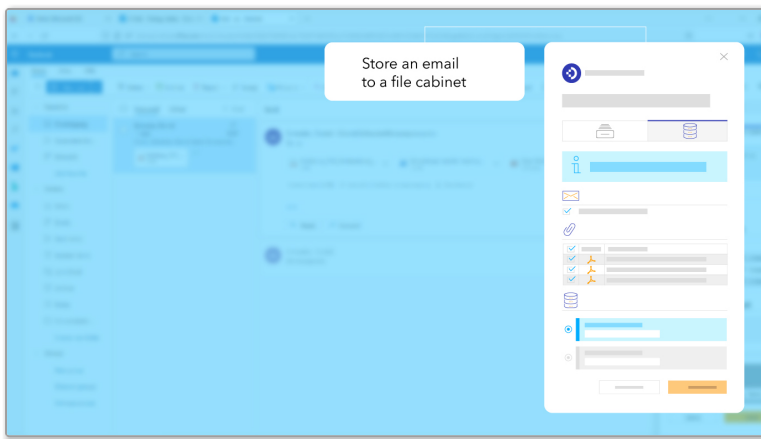
2 Integrations

2.1 DocuWare Outlook Add-in

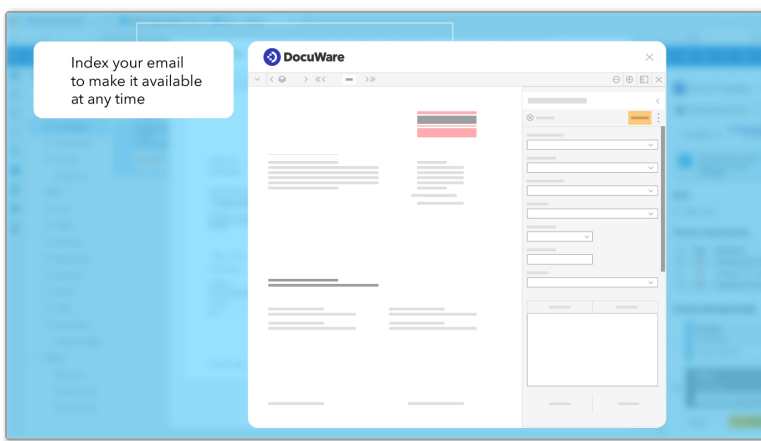
Components: DocuWare Outlook Add-in, DocuWare Cloud

The new DocuWare Add-in enables an easy connection of DocuWare Cloud with Microsoft Outlook, both with the web and desktop version. Users can store their emails in a DocuWare tray or directly in a file cabinet, choosing which attachments to transfer to DocuWare with.

The add-in complements DocuWare's integration capabilities with Outlook clients. Unlike the DocuWare Connect to Outlook desktop app, the add-in is suitable for Microsoft's web and online versions in all browsers, including Mac operating systems.



To save an email directly to a DocuWare file cabinet, you select a corresponding store dialog and the attachments that are to be archived along with the email.



Indexing an email for storing in DocuWare also takes place in the Outlook environment.

Applications

- Store business relevant emails in DocuWare to start related workflows and to make the information available to your team
- Store email and attachment(s) as one clipped document in a DocuWare tray or file cabinet
- Select individually between one or more attachments to be archived separately or with the email body

Benefits

- Easy integration of Microsoft Outlook online versions with DocuWare for email archiving
- Outlook integration without the need for a desktop app
- Mac users can now archive easily their Outlook mails in DocuWare

Here's how

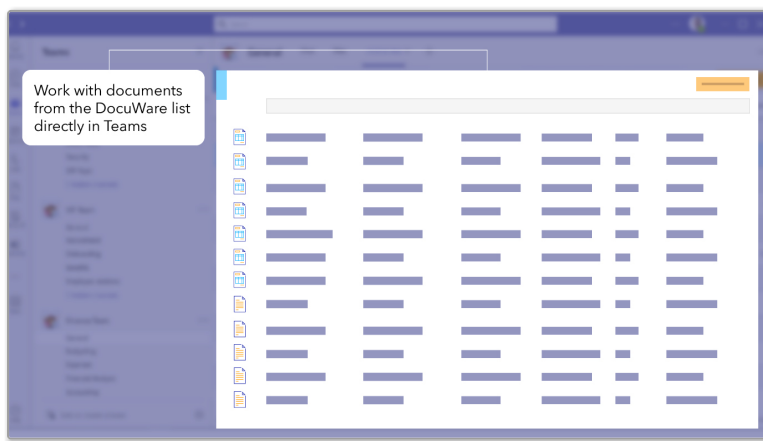
The DocuWare for Microsoft Outlook Add-in is available since January 2024 and can be used by DocuWare Cloud customers at no additional cost. The add-in can be added to Outlook accounts for free via the Microsoft Store within the Add-ins section of Outlook, for both web and desktop versions of Microsoft Outlook.

In the Knowledge Center, you will find [more information about setting up and using the app](#), as well as a [comparison list](#) with the differences between DocuWare Connect to Outlook desktop app and the DocuWare for Outlook Add-in.

2.2 Integrate DocuWare lists into Microsoft Teams

Component: Connect to Teams

DocuWare lists and tasks can now be integrated as tabs in a Teams chat or channel. All those who primarily work in Teams can now keep an eye on their current to do's and complete them directly from Teams. This applies both to lists as file cabinet dialogues and to task lists in connection with workflows.



DocuWare list as a tab in Microsoft Teams

 Applications

- Add a list of current product brochures to the Teams channel that Sales uses so that the documents are directly available where colleagues work.
- You include the workflow tasks as a tab within your department's Teams. From there, users can see tasks assigned to them and everyone has a good overview of tasks assigned to the department. All can process their tasks directly from within Teams.

 Benefits

- Quick and easy access to documents and tasks for those who do not often work directly in DocuWare
- Open and edit DocuWare workflow tasks directly from Teams

 Here's how

This innovation from November 2023 relates to lists in the form of file cabinet dialogues as well as task lists in connection with workflows. Customers who already use the DocuWare Teams app need to update the app to receive the functions. For more information, see the [Connect to Teams help](#) in the DocuWare Knowledge Center.

2.3 DocuWare storageRobot

Component: DocuWare storageRobot

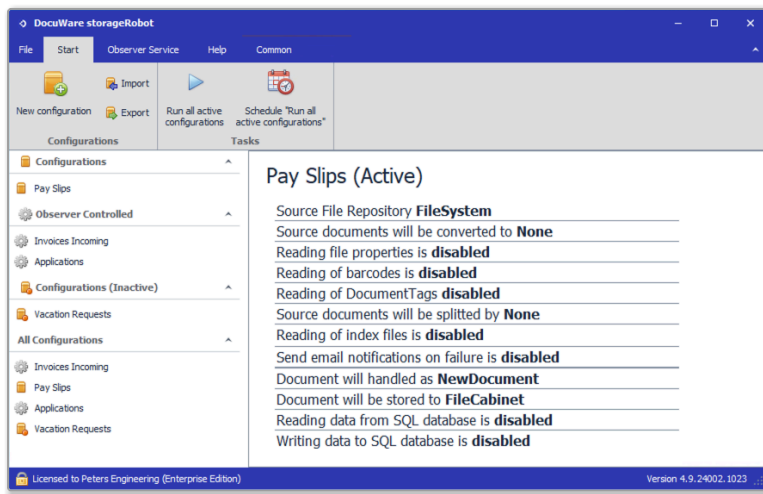
With storageRobot, DocuWare expands its portfolio with a module for very special or complex scenarios when importing documents into DocuWare document trays and file cabinets. Many ERP and merchandise management systems generate outgoing documents, journals and lists as finished files. Storing these files can pose special challenges due to the source, database query options or index file formats. storageRobot helps you to handle these use cases in a flexible way.

 Applications

- You use Intelligent Indexing for your document tray and can now automatically store documents recognized as "green" meaning reliable.
- The index data can be conveniently read directly from a database using SQL when importing your documents into DocuWare.
- Receive documents in ZIP format and automatically save the associated files as individual documents, which are also processed individually.

 Benefits

- Document tray, file cabinet or FTP as sources
- File cabinets, document trays and file system folders as targets
- Processing of index files in XML, CSV, TXT formats
- Reading and writing back SQL

 Here's how


The start interface of storageRobot shows the configurations overview.

An additional license is required for both DocuWare Cloud and locally installed systems. You can find more information about the new module in the [DocuWare storageRobot Product Info](#).

2.4 DocuWare docXporter

Component: DocuWare docXporter

With docXporter, you can export documents, index data or both automatically from DocuWare file cabinets to your file system, for example, to make them available for external systems. The flexible output structure and filter options for documents and data allow you to map the most complex scenarios.

Applications

- Export the digital receipts of a day as PDFs for provision to a third-party system. DocuWare stamps and annotations, such as those indicating cost centers, are included for your tax consulting. Documents consisting of multiple files can be exported as a ZIP archive.
- To make documents available in a folder structure, you define the structure using the archive's index terms. This allows you to export documents to subfolders such as <customer> or <document type>. You also define the filenames as a combination of fixed values and the document's index data.
- As a cloud customer, you can create local backups of all or selected documents, in addition to cloud backups, if needed.



Benefits

- Export documents and/or index data
- Export of documents as PDF, TIFF or ZIP
- Structured output
- Flexible filter options
- Logging of activities



Here's how

```
<!-- Document Export Settings -->
<setting name="ExportMode" serializeAs="String">
  <value>Pdf</value>
</setting>
<setting name="ExportTarget" serializeAs="String">
  <value>Folder</value>
</setting>
<setting name="ExportPath" serializeAs="String">
  <value>c:\demoexport\{COMPANY}\{DOCUMENT_TYPE}</value>
</setting>
<setting name="FileName" serializeAs="String">
  <value>{DWDROID}</value>
</setting>

<!-- Document Grouping Settings -->
<setting name="GroupFileNamePattern" serializeAs="String">
  <value></value>
</setting>
<setting name="GroupPath" serializeAs="String">
  <value>{COMPANY}\{DOCUMENT_TYPE}</value>
</setting>
```

docXporter is configured via an XML file, which you adapt to your processes on predefined parameters and values.

An additional license is required for both DocuWare Cloud and locally installed systems. For more information, see [ProductInfo DocuWare docXporter](#).

3 Security

3.1 Authorization of all DocuWare components via OAuth2

Components: All Desktop components

All server and desktop connections are now using the modern and secure OAuth2 standard which is replacing our previous cookie-based method. Instead of the central log in to DocuWare Desktop, each desktop application is now authenticated separately to DocuWare via OAuth2 at startup. For this purpose, a browser window with the DocuWare login opens at the first start.

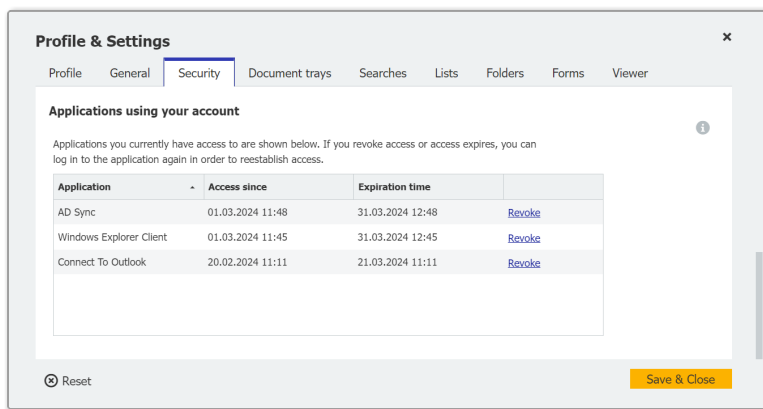
Benefits

- Enhanced security
- Fit for the future

Here's how

Make sure to install the newest version of the Desktop Apps after updating to DocuWare 7.10.

When a desktop application is started for the first time, the DocuWare login dialog opens in the browser. After successfully logging in, the corresponding desktop application is started and authenticated against DocuWare.



You will find the expiration date in the web client's main menu under Profile & Settings > Security.

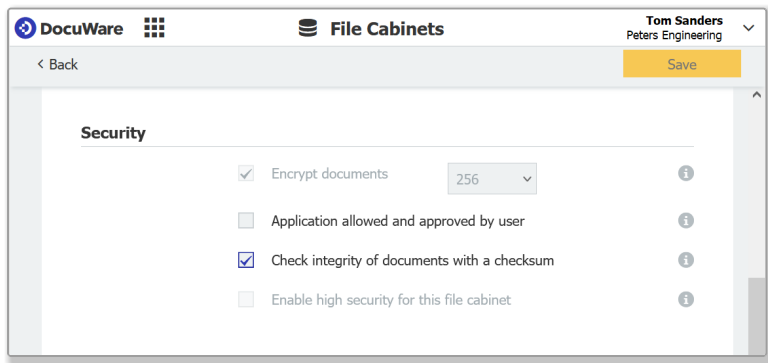
3.2 Checksum with new encryption algorithm

Component: DocuWare Configuration

If you have enabled integrity checking in the file cabinet settings, a checksum is created for each stored document during archiving. This allows you to determine if a document has been modified at the file level in the viewer using the *Check if document has been modified* button. This function now uses the new SHA-256 algorithm.

 Benefits

- Greater security
- Future-proof technology

 Here's how

You can activate the integrity check via checksum in DocuWare Configuration under *File Cabinet > General > Security*. The new algorithm is only used for new checksum calculations. Existing checksums, i.e. checksums created before version 7.10, remain unchanged.

3.3 Even more security for webhooks and web services communication

Components: Workflow Designer, DocuWare Configuration

When you use webhooks and web services, the HMAC cryptographic technology guarantees the authenticity and integrity of transmitted messages, in addition to other security mechanisms.

 Here's how

To execute a test HTTP request, in the Workflow Designer, you use the *send* function in the web service activity and in the configuration of webhooks, you use the *test* function. The hash is calculated with the passphrase of the organization. The user running the test must be an organization administrator.

The DocuWare iPaaS Connector for make.com also checks this signature. This applies to webhooks, web service activities in the workflow and validation in store and index dialogs.

4 Workflow management

4.1 Requests: Status is displayed in list

Components: Web Client, Workflow Manager

You can now view the status of your requests in the list of sent requests. The status column shows either *Completed* or *Pending*. You can now also sort your requests according to the *Decision* and *Status* columns.

Benefits

- Better overview
- Always up to date

4.2 More workflow history options

Component: Workflow Manager

You can now export the workflow history as a CSV file to use the data for your own purposes.

In addition, you can now view the start and end time of an activity in the workflow history. The *Completed on* column (previously *Date*) now only shows the date and time of completion. As long as the activity is still being processed, the column remains empty. The start time can be found in the details of the individual activity.

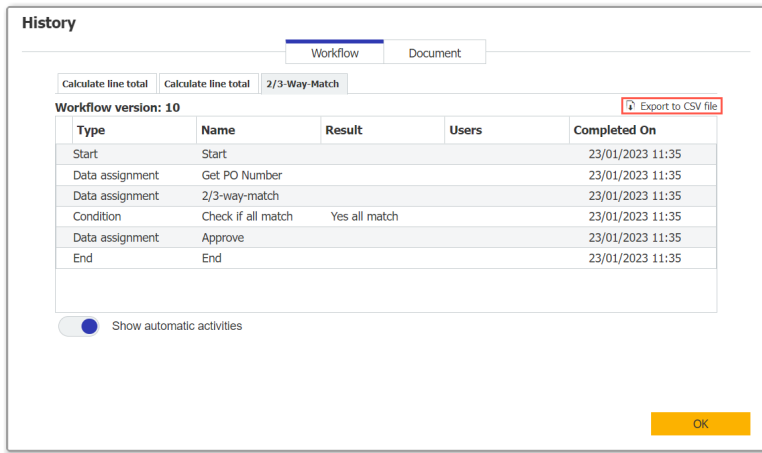
Applications

- As part of an audit, you need a proof of process for the auditor and make this available as a CSV file.
- You would like to provide a controlling overview for an internal company evaluation.
- An error has occurred in a workflow and the history provides you with information for solving the problem.

Advantages

- More convenient provision of information
- More flexibility

 Here's how



History

Workflow | Document

Calculate line total | Calculate line total | 2/3-Way-Match

Workflow version: 10 Export to CSV file

Type	Name	Result	Users	Completed On
Start	Start			23/01/2023 11:35
Data assignment	Get PO Number			23/01/2023 11:35
Data assignment	2/3-way-match			23/01/2023 11:35
Condition	Check if all match	Yes all match		23/01/2023 11:35
Data assignment	Approve			23/01/2023 11:35
End	End			23/01/2023 11:35

Show automatic activities

OK

You can initiate the export as a CSV file via the new button.

4.3 Even designers can monitor and stop workflow instances

Component: Workflow Designer

Users with the Designer role can now also monitor and stop them. This means that they also have the permissions of the Controller role by default, without having to be granted them separately. In addition, designers and controllers no longer need any additional permissions to open the Workflow Designer.

 Benefits

- Simplified workflow management
- Create, edit and control from one place
- Reduced rights management overhead

4.4 More convenient method for REST web services

Component: Workflow Designer

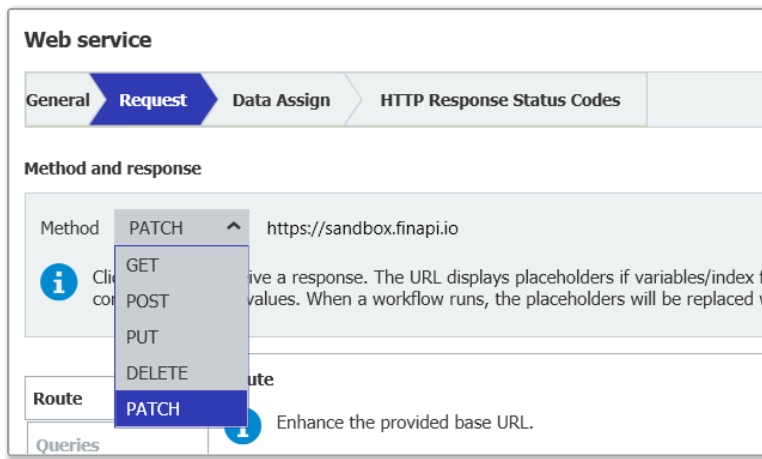
If you set up a web service for a REST API, the PATCH method is now also available for the HTTP request - in addition to the already supported GET, PUT, POST and DELETE methods.

 Application

- When setting up a web service, you work with complicated objects and resources and PATCH provides you with a simpler method.

 Benefit

- Facilitates configuration
- Saves time

 Here's how


In the Workflow Designer, select the PATCH method under *Web services > REST web service > Request* tab. The PATCH method provides a series of instructions for modifying a resource and is therefore simpler than the PUT method. More information: <https://developer.mozilla.org/en-US/docs/Web/HTTP/Methods/PATCH>

4.5 Web services: Additional endpoints and query parameters

Component: Workflow Designer

For Web services, endpoints are now also available through the Platform REST API for the following functions: search by dialog, transfer documents, create users, modify user properties, get all users of a role, and delete documents. In addition, for the existing endpoints, there are additional query parameters that you can choose from.

Application

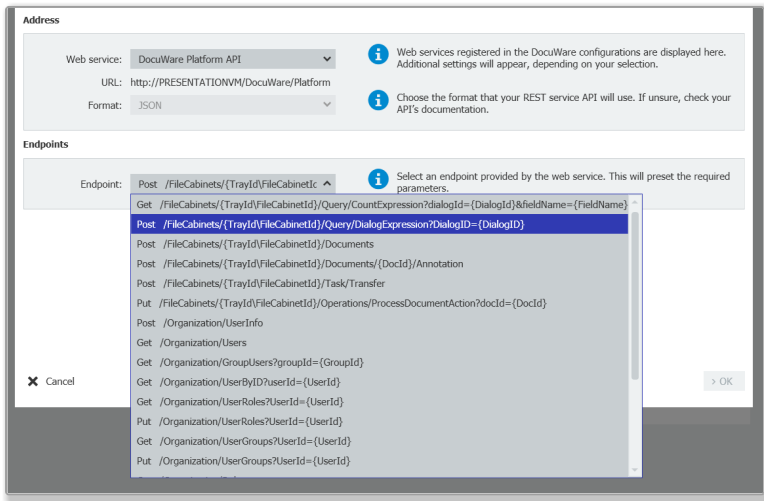
- You receive documents exported from an ERP that you want to use in a workflow. However, the documents only have an ERP-specific DOCID as index data, which consists of a GUID and is written in the document name. No other index data can be provided. In this case, you use a full-text search to identify the documents so that you can easily use the results in the workflow.

Benefits

- More flexibility
- Higher accuracy if index data is missing during import



Here's how



In the Web services activity, the following additional endpoint addresses and query parameters are available via the Platform REST API:

Endpoints

- Search by dialog:
POST /FileCabinets/{TrayId/FileCabinetId}/Query/DialogExpression?dialogID={DialogId}
- Transfer documents:
POST /FileCabinets/{TrayId/FileCabinetId}/Task/Transfer
- Create users:
POST /Organization/UserInfo
- Modify user properties:
PATCH /Organization/UserInfo
- Get all users of a role:
GET /Organization/RoleUsers?RoleId={RoleId}&IncludeGroupUsers={false|true}
- Delete documents:
DELETE /FileCabinets/{TrayId/FileCabinetId}/Documents/{DocId}

Query parameters

- Get all users of the organization; filter by active state or username:
GET /Organization/Users?Active={true|false}&Name={UserName}
- Get all groups of a specific user; filter by active state or group name:
GET /Organization/UserGroups?UserId={UserId}&Active={true|false}&Name={GroupName}
- Get all roles of a specific user; filter by active state, role name or type:
GET /Organization/UserRoles?UserId={UserId}&Active={true|false}&Type={Standard|Default|Administrator}&Name={RoleName}

- Get all roles from the organization; filter by active state, role name or type:
GET /Organization/Roles?Active={true|false}&Type={Standard|Default|Administrator}&Name={RoleName}
- Get all groups from the organization; filter by active state or group name:
GET /Organization/Groups?Active={true|false}&Name={GroupName}

5 Configuration and settings

5.1 Size limit for forms and attachments

Component: DocuWare Forms

For non-public forms, the size limit for file attachments has been extended from 20 MB to 300 MB per attachment and from 100 MB to 500 MB for the whole form, including all the images, fields, data and attachments.

For public forms, the existing size limits (20 MB and 100 MB) remain in place for security reasons.



Applications

- Travel expense form: Photos of expense reports can be loaded directly into the form, they do not have to be downscaled beforehand.
- Order request: even more extensive offers, e.g. with pictures, can easily be attached to the form.



Benefits

- Better support for common application scenarios
- More user-friendly



Here's how

You determine the permitted sizes for file attachments as before in the field settings for "attach file" fields.

The values for existing non-public forms are not automatically changed when updating to version 7.10.

5.2 Mandatory or read-only as options for entire index tables

Components: File cabinet dialogs, Workflow tasks

Index tables can now be configured more precisely, as required or read-only, in storage and index dialogs as well as in workflow tasks.

In case of mandatory input, at least one row of the table must be completely filled in.

With read-only, users can neither enter or change data nor add or remove rows.

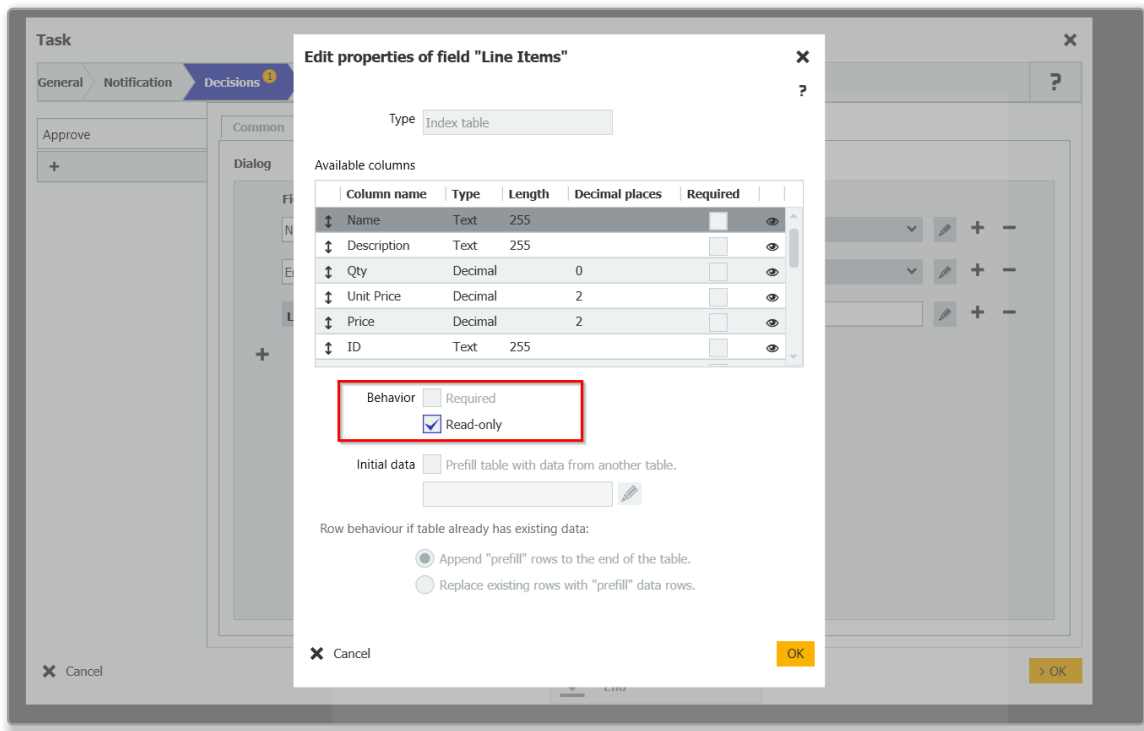
Previously, corresponding settings were only possible for table columns, not for the entire index table.

 Benefits

- Exclude empty tables with the "Required" option
- Exclude editing of the index table completely with the "Read-only" option
- The user's scope of action for index tables can be precisely defined

 Here's how

For storage and index dialogs, the options are available within the dialog configuration, for workflow tasks in the settings for the index table:



5.3 File cabinets as source for select lists

Component: Indexing Assistance

Even with on-premises systems, file cabinets can now be selected directly as a source for select lists; the reference via a database connection is no longer necessary. With DocuWare Cloud, this option has been available since version 7.9.

 Applications

- Supplier master data is recorded and maintained in a file cabinet. In the invoice file cabinet, the company names are available in the supplier select list.
- A file cabinet with cost center numbers and names can also be used accordingly.

 Benefits

- (Re-) use data easily
- Consistent data, e.g. company names, across multiple file cabinets

 Here's how

In the DocuWare configuration in the Indexing Assistance area, the option is available as a source for external select lists.

5.4 Functional right: View all users

Component: User Management

The new functional right "View all users" enables or prevents users from seeing which rights, profiles or roles are assigned to other users.

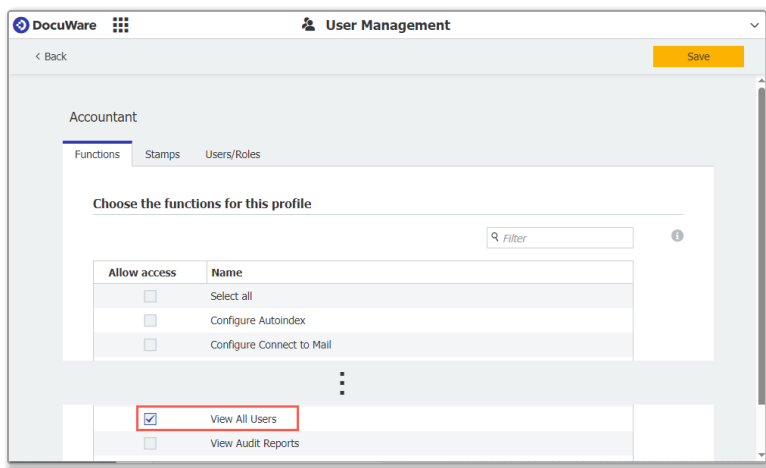
 Application

- Compliance with data protection if not all users in the system are allowed to see which users also exist or what rights they have.

 Benefit

- Simple implementation of data protection measures

 Here's how



In order not to change the previous behaviour, the right is set in the "Default Organization profile" when updating to version 7.10 so that it applies to all users in the organization. To revoke this right from individual users, the organization administrator must deactivate it in the "Default Organization profile" and assign the right to other users via another function profile.

5.5 Assign user licenses more easily

Components: User Management, DocuWare Cloud

The "Licenses" tab has been added to the user administration to assign a named or workflow license to the respective user or to revoke a license. The remaining number of available licenses is also displayed.

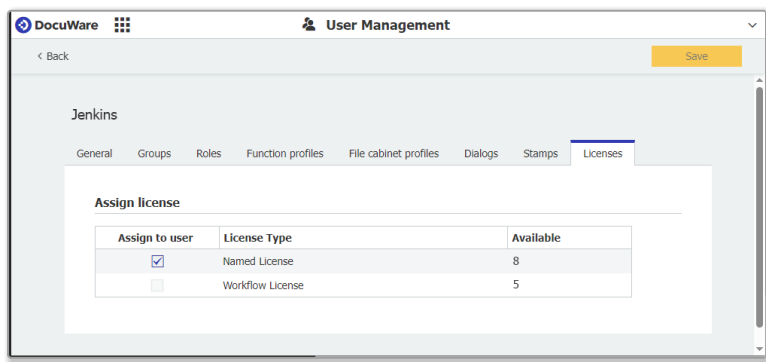
Applications

- Provide users with the appropriate license
- View the number of free user licenses

Benefit

- Simpler license assignment

Here's how



The new tab is available in the user administration at the level of an individual user. Only one license can be assigned per user.

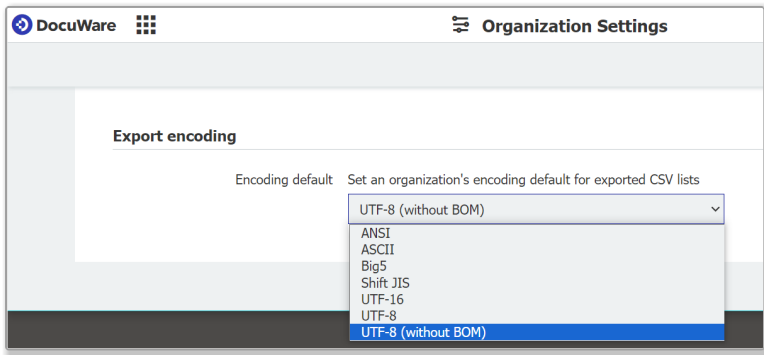
5.6 Export: New file encoding format

Components: Export

CSV files that have been exported from DocuWare sometimes need to be imported into older versions of third-party applications. To enable this without conversion, the "UTF-8 without BOM" format is now also available for file encoding (BOM stands for Byte Order Mark).

Benefits

- Extends compatibility
- Saves time for workarounds

 Here's how

You select the option in the organization settings, it is then used when exporting from the results list. For DocuWare Export, the organization setting is adopted as the default and can then be changed for each export configuration. UTF-8 is not dependent on BOM, so it does not need to be included. If it is included, it can be ignored by the reading application.

6 Technical information

6.1 Modified system requirements

Compared to DocuWare version 7.9, the system requirements have changed as follows:

General system requirements

- **.NET 8** instead of .NET 6 for individual DocuWare Desktop Apps and DocuWare Server components (automatically installed).
- **Connect to Outlook** can now be used with Microsoft Office 2021 and Microsoft Office 365.
The versions Microsoft Office 2013, Microsoft Exchange Server 2010 and Microsoft Exchange Server 2013 are no longer supported.

Changes for on-premises systems

- **User synchronization** must be done via the Desktop App *DocuWare User Synchronization*, it is no longer possible via DocuWare Administration.
- The DocuWare **IndexCleaner** is no longer available as of this version.
- **Oracle** databases are no longer supported, not even for existing systems.

As usual, you can find the [complete system requirements](#) in the Knowledge Center.

6.2 Further Documents for Version 7.10

DocuWare Functions Overview

The [Functions Overview](#) lists all DocuWare functions and its add-on modules, including availability in DocuWare Cloud and on-premises in the various server editions. For client functions, their availability is also listed in the Web Client and the Windows Explorer Client.

Important changes

Before updating to Version 7.10, please check the extent to which the [changes with this version](#) are relevant to your system.

6.3 Update to Version 7.10

DocuWare Cloud

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

DocuWare as an on-premises system

To update, your current DocuWare system must be at a minimum version 7.5. To implement the update, please contact your Authorized DocuWare Partner. Please also check to what extent [technical changes with DocuWare Version 7.10](#) are relevant to your system.



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