

DocuWare Web Client

Quick Reference Guide



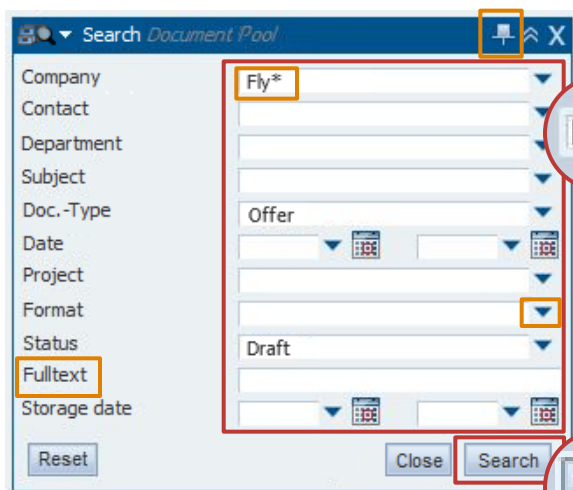
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Searching for Documents



Select a search dialog, identifiable by a magnifying glass, for the cabinet you wish to search.

The search dialog opens.



Enter your search terms in the fields provided.

Start search here.

Tips for search dialog

Pin dialog

The dialog will open with the same search terms the next time you open DocuWare.

Select list

Choose your search terms from a select list rather than typing them; this helps avoid entry errors.

Asterisk search

Type 'Fly*' to search for all companies beginning with 'Fly'.

Fulltext Search

If your file cabinet has a full text field, you can search here for any word(s) in the document.

2 Documents in Result List and Basket

The search is carried out and a result list displayed.

Company	Contact	Doc.-Type	Project	Status	Date
Flying Tom	Thomas Rain	Offer	Roller coaster	Draft	06/05/2012
Flying Tom	Thomas Rain	Offer	Wagon	Draft	06/06/2012
Flying Tom	John Dee	Offer	Drive system	Draft	07/02/2012

Tip for result list

Pin result list
The result list remains open. The next time you work with DocuWare, the search is performed again, automatically, and a current list of hits is displayed.

Tip for document menu

Print or send the document directly from the result list.

Tips for basket

Basket menu
Use this icon to open the basket menu.

Import documents
Use this icon to import or just drag & drop the documents to your basket.

Document menu
With a right click you will find all document-specific commands, for example, edit, print, send, store, and more.

Views

Here you select how the documents are displayed in the basket.

Click to open options for the result list.

- Change search
- Refresh result list
- Send link to result list
- Export result list as a CSV
- Sort result list by ...
- Results per page...
- Create DocuWare Request
- Also show checked out documents
- Fixed height
- Open each document in new window
- Edit all entries

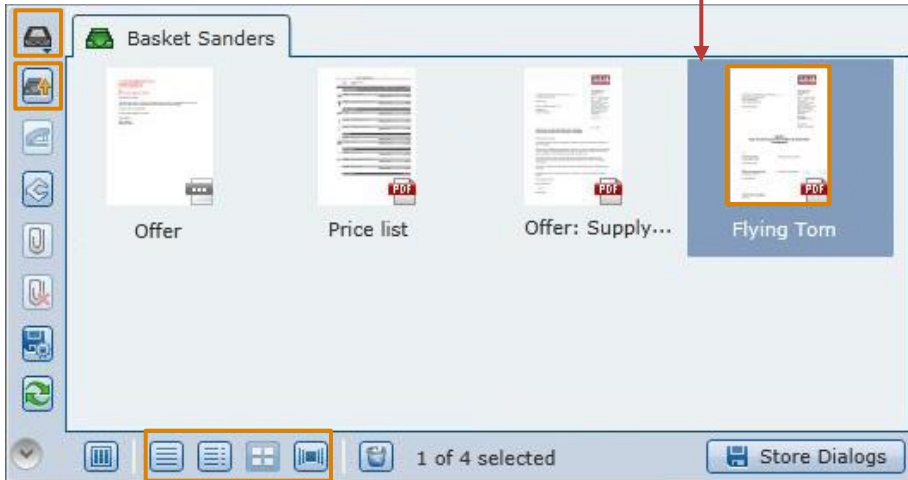
Click to open options for the document.

- Open in Viewer
- Open in a new Viewer
- Open as read only
- Edit
- Print
- Send
- Download
- Change status
- Copy to selected basket

Double-click on the row to display the document.



Below shows the copied document in the basket.



The basket contains documents waiting to be edited.

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Display Documents

Double-click to open documents in the viewer from the result list or from the basket.

The screenshot shows the DocuWare Web Client interface with a document titled "Quotation for the supply and construction of 'Thunderbird' roller coaster" displayed. The interface includes a left-hand navigation pane with several sections: Navigation, Tools, Display, Stamps, Annotations, and Overview. Red boxes and arrows highlight specific features:

- Navigation:** Callouts point to the "Doc 4 / 5" and "File 1 / 1" indicators, with text: "Scroll through the documents of the result list / basket" and "Scroll to view different files within the document".
- Tools:** A callout points to the navigation icons, with text: "Scroll through the document".
- Display:** A callout points to the zoom level (64%), with text: "Stamp document".
- Stamps:** Callouts point to "Denied" and "Approved" options.
- Overview:** A callout points to a thumbnail view of the document, with text: "Thumbnail view of the document".

The document content includes contact information for Peters Engineering and Flying Tom, a date of 04/10/2012, and a project number of 2005011. The footer indicates "Page 1 of 4" and "Adobe PDF 209x297mm".

Tips for viewer

Display tooltips

Hold mouse over an icon on the toolbar for the description of its function.

Viewer Preferences

Here you adapt the toolbar to suit your personal tasks. Arrange frequently used functions (icons) at the top or at the beginning of each category; hide tools you do not use. You then have a good overview of the functions important to you.

Download

Download the document displayed, either in its original format or as a PDF.

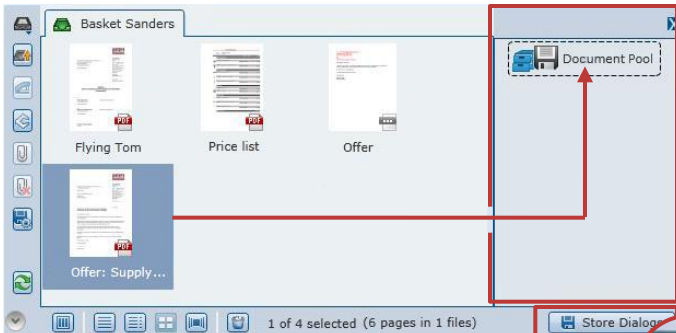
Edit

Editable documents such as Word, Excel or other files are opened in the editor. This means that you modify the document directly where you have it open: in the file cabinet or in the basket.

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Storing Documents ...

...from the basket



Begin by clicking on Store Dialogs button.

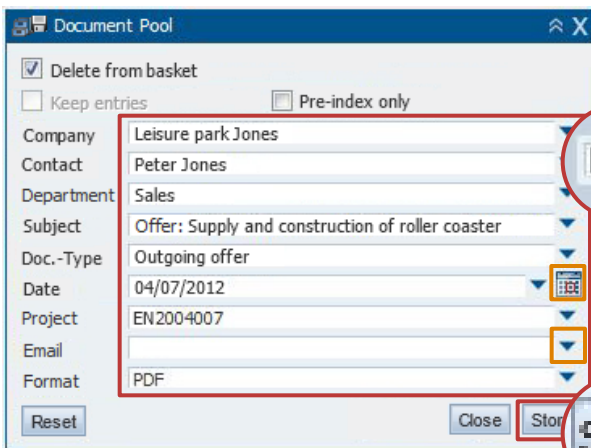
Next, drag and drop the document to be stored onto the dotted field of the store dialog. The dialog opens.



Tip for basket menu

Store via context menu

You have the option to store a document from the context menu of a documents by selecting the command *Store* followed by the desired store dialog.



Enter your index terms in the fields provided.

Click here to store the document.



Tips for store dialog

Select list

Choose your index terms from a select list rather than typing them; this helps avoid entry errors.

Current date

In the date field hit the x key and today's date is entered in the field. Use the + and - buttons to go one day forwards or back.

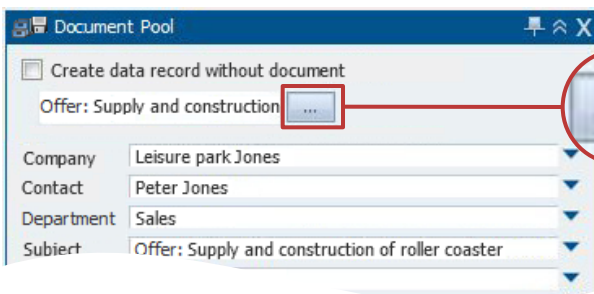
Calendar

Click on the icon to select the desired data from a calendar.

...from the file system



Open the store dialog here.



Use this button to browse your file system to select a document you wish to store.