DocuWare
From Documents to Value

DocuWare Web Client
Quick Reference Guide

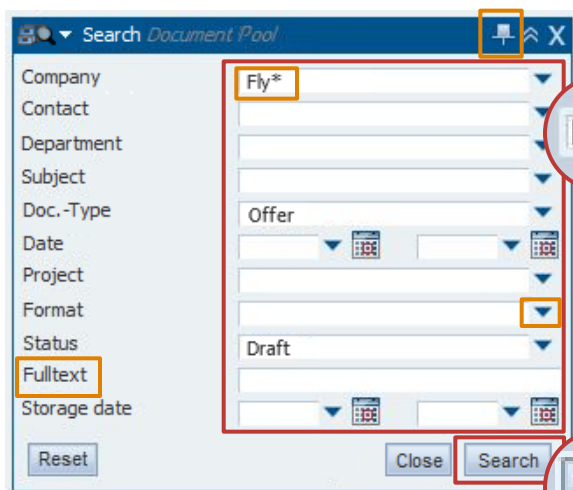## 1 Searching for Documents

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.

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

Document Pool *3 Entries*

Page 1 of 1, doc. 1 to 3 of 3

Click to open options for the result list.

Click to open options for the document.

Double-click on the row to display the document.

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
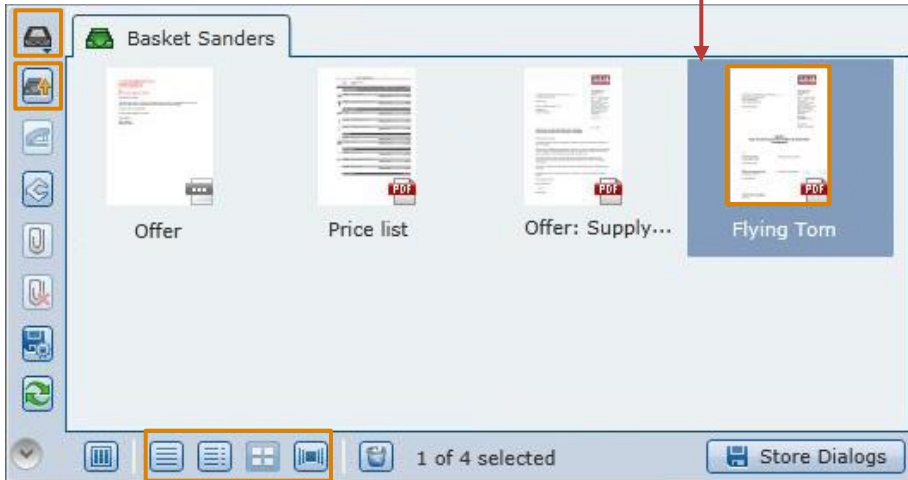Fixed height
Open each document in new window
Edit all entries

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

Below shows the copied document in the basket.

Basket Sanders

Offer | Price list | Offer: Supply... | Flying Tom

1 of 4 selected | Store Dialogs

The basket contains documents waiting to be edited.

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
Send

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.

3 Display Documents

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

Scroll through the documents of the result list / basket

Scroll to view different files within the document

Scroll through the document

Stamp document

Thumbnail view of the document

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.
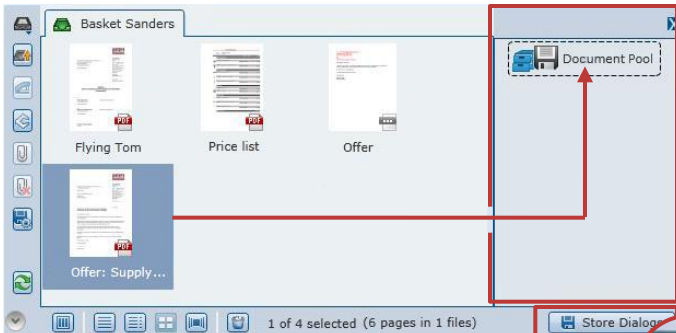
Edit

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.

4 Storing Documents …

…from the basket

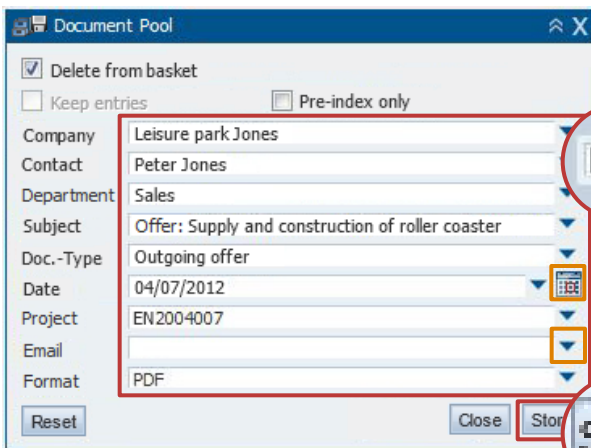Begin by clicking on Store Dialogs button.

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

Enter your index terms in the fields provided.

Click here to store the document.

…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.

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.

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.
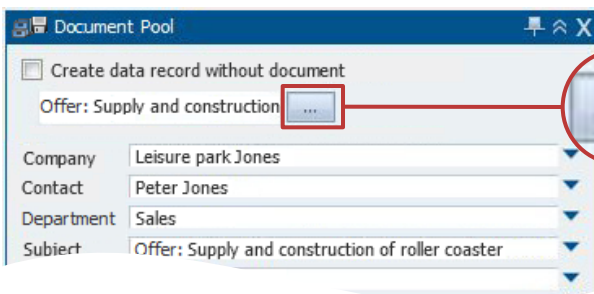
Calendar

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