



**DocuWare 7.13**  
**User Manual**  
**DocuWare Desktop Apps Install**



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## Introduction

This document provides basic instructions on how to install DocuWare Desktop Apps, required for many DocuWare functions.



## About DocuWare Desktop Apps

Think of **Desktop Apps** as the handshake between your local computer and the DocuWare cloud. They are small plugins that let your PC talk to DocuWare so you can do things like print, scan, and email without constant clicking and dragging.

Why you'll love them:

- **No more "Download-Edit-Upload"**: Open an Excel spreadsheet stored in DocuWare, edit it in Excel, and save it back automatically.
- **Direct Delivery**: Scan paper straight into your digital tray or email a file directly from your cabinet.

### Available Desktop Apps

When you install Desktop Apps, you can choose only what you need:

- **Connect to Outlook**: Save important emails and attachments to DocuWare without ever leaving your Outlook inbox
- **Edit & Send**: Tweak documents or email them directly from the DocuWare interface (Microsoft Office)
- **Import**: Have a folder on your PC or network? DocuWare can watch it and automatically grab any file you drop in there
- **Printer**: "Print" a document from *any* program (like Word or a web page) straight into DocuWare as a PDF (adds a DocuWare as a Printer option on your PC)
- **Scan**: Turn paper into digital files instantly when connected to a scanner
- **Smart Connect**: Working in your accounting software? This tool creates a button or keyboard shortcut to show you matching documents in DocuWare instantly
- **Windows Explorer Client**: Treat DocuWare like just another folder on your computer. Drag and drop simplicity



## Get Up and Running (In about 60 seconds)

Installation is easy. Just follow these steps:

1. **Find the Installer:** In DocuWare, click your user name (top menu) and select **Desktop Apps > Install Desktop Apps**
2. **Launch:** Once the download finishes, double-click the file
3. **Pick Your Tools:** You don't need to install everything—just check the boxes for the apps listed above that you actually plan to use (you may need to click the “Adjust Installation” link in the installer to see them all)
4. **The Final Handshake:** Once installed, go back to your DocuWare menu (click your user name) and select **Desktop Apps > Connect Desktop Apps**.

DocuWare Desktop Apps can be installed organisation-wide by IT departments using Silent Set Up. Please find instructions on how to do so here: <https://support.docuware.com/en-us/knowledgebase/article/KBA-37925>



## Troubleshooting

Installed the apps but the "Send to DocuWare" printer is missing? Or maybe the "Edit" button is greyed out? Don't panic. 99% of the time, it's just one missing step.

### DocuWare Desktop Apps Checklist

**1. The "Connect" Step:** Downloading the software puts the engine in the car, but "Connecting" turns the key. It is the most commonly skipped step!

- **The Fix:** Go back to your browser, click your **User Name** in the DocuWare menu, and select **Desktop Apps > Connect Desktop Apps**.
- **Note:** You might get a pop-up asking for permission. Say "Yes" or "Open"—it's just the browser introducing itself to your computer.

**2. Check your Traffic Light** Look at the bottom right of your Windows screen (in the system tray near the clock). You should see a little DocuWare icon (click the up arrow to see all apps running).

- **Grey Icon:** The apps are running, but they aren't talking to the system. See *Step 1*.
- **Blue Icon:** You are connected and good to go!
- **Yellow Icon:** Desktop Apps needs updating - double click the yellow icon and follow the instructions. Once complete, return to DocuWare and *repeat Step 1* above
- **No Icon:** The app isn't running. Search "DocuWare Desktop" in your Windows Start menu and launch it.



**3. Refresh the Browser** Sometimes your browser just needs a second to realize the new tools are there.

- **The Fix:** Hit **F5** or the Refresh button on your browser.

**4. The Classic IT Fix** If all else fails...

- **The Fix:** Restart the DocuWare Desktop app (Right-click the icon > Restart) or give your computer a quick reboot. It's a cliché because it works.