



DocuWare 7.13
User Manual
Document Search & Retrieval



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Introduction

This document gives an overview of the DocuWare front end and a detailed breakdown of the functions available to the end user with use cases where appropriate.

Please note, the guide will contain screenshots from systems other than your own, but the principles are the same.



User Interface

This is the DocuWare interface you will see. Please see next page for explanation of each numbered feature.

The screenshot displays the DocuWare interface with the following numbered features:

- 1:** User profile and notification icons in the top right.
- 2:** DocuWare logo in the top left.
- 3:** Search bar in the top navigation bar.
- 4:** Lists icon in the top navigation bar.
- 5:** Tasks icon in the top navigation bar.
- 6:** Folders icon in the top navigation bar.
- 7:** Forms icon in the top navigation bar.
- 8:** Document tray icon in the left sidebar.
- 9:** Store button in the top right of the document viewer.
- 10:** Document thumbnail in the left sidebar.
- 11:** Redaction tool icon in the right sidebar.
- 12:** Tools panel in the right sidebar.
- 13:** Document title and navigation controls at the top of the viewer.
- 14:** Close button in the top right of the viewer.
- 15:** Document metadata (name, type, date, size) at the bottom of the viewer.

The document content includes the Peters Engineering logo, contact information, and the following text:

Business Service Agreement Agreement Number 54982

THIS BUSINESS SERVICE AGREEMENT dated December 5, 2024 by and between Peters Engineering (Contractor), a New York Corporation and the Recipient.

Recipient Company Name: **Flying Tom**
 Recipient Contact Name: **Thomas Rain**
 Recipient Email: **Click or tap here to enter text.**
 Recipient Phone Number: **N/A**

Project: Leisure Park Roller Coaster

1. Scope of Work

- The contractor shall furnish all the material and perform all the work on the project as shown on the drawings and as described in the specifications, all in accordance with scope described herein and the terms of the agreement document.

2. Payment Terms

- Payment terms: Not 30 days.
- The agreement amount shall be **\$13,000.**

3. Time of Completion

- The contractor shall employ persons of competence and skill to complete the project within 15 days of the signed agreement.

Peters Engineering looks forward to doing business with you.
 The undersigned agrees to the terms of this agreement.



DocuWare UI Key

The items highlighted in bold relate directly to search, retrieval and working with documents.

1. The User menu where users can access Profile & Settings, connect to Desktop apps and more. Click for dropdown menu
2. Document Tray - this is where most documents will be imported to, ready for storing in DocuWare. You could have access to multiple Document Trays for different reasons
3. **Search - this is where you search the file cabinet(s) you have access to for store documents**
4. **Lists - lists of documents that meet certain criteria, defined by administrators**
5. Tasks - if you are required to make an action on a document determined by another user or a workflow, your Task will appear here
6. **Folders - access to organised Folders of documents to which you have been given permission**
7. Forms - digital forms that can be filled in and stored directly into a DocuWare file cabinet
8. Your import options to transfer documents to your Document Tray
9. The Store button - when you want to store a document from your Document Tray to a file cabinet
10. A document in your Document Tray
11. **The document viewer - shows the document you are currently working on. Double click a document on the left in Document Tray or from a Search to open it in the document viewer**
12. **Toolbar providing many ways to work with the selected document**
13. **Navigation menu to switch between documents and pages of documents**
14. **Zoom functions to zoom in and out of the document for better reading**
15. Document specific information - filename, file type, creation date



Highlight Search

Highlight any number or text in any third party system with your mouse cursor and hit a pre-configured key combination. Eg. CTRL+ALT+F

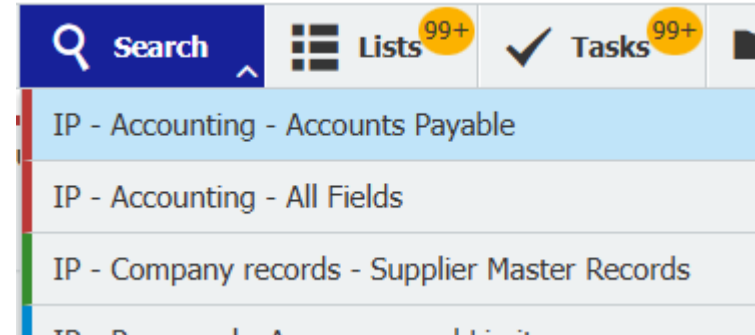
This will return a list of all documents in DocuWare that contain the highlighted text/number.



Search - in DocuWare

DocuWare's Search function is extremely powerful, giving you the ability to retrieve stored documents in a variety of ways.

Depending on your level of access, when you click the dropdown arrow on the Search tab, you will see different the Search dialogs available to you.





When you click on this Search dialog, you will be presented with all the index fields you can use to search for documents.

Note you can use multiple index fields to narrow down your search, as well as the Fulltext search field.

Each index field can be used as a dropdown or be entering text:

Fulltext	<input type="text"/>
Subsidiary	<input type="text"/> ▼
Document Type	Invoice in ▼
Supplier	<input type="text"/> ▲
Supplier Account	<input type="text"/> APC Workwear
Invoice Number	<input type="text"/> Bath-Lift Limited
Invoice Date	<input type="text"/> Bodyease LTD
Due Date	<input type="text"/> Emmiera Group
PO Number	<input type="text"/> Healthcare Distribution Direct Ltd
	<input type="text"/> Impact Solution



The dropdown option above will contain the first 50 results from the specific index field. This option is useful if you know there will be very few results.

The screenshot shows a search interface with a 'Reset' button (indicated by an 'x' icon) and a 'Search' button. Below these is a search field labeled 'Document Type' with a dropdown arrow. The dropdown menu is open, showing three options: 'Call Off Order', 'Pringle PO', and 'Purchase Order Out'. To the left of the dropdown are four input fields labeled 'Supplier', 'Date', 'Supplier Account', and 'Subsidiary'. At the bottom right of the dropdown menu, there is a 'Filtering' checkbox which is checked.

When you start typing in the index field, the results will be filtered. In this example, just typing 'P' narrows the result list to just two results. Typing 'Pur' would narrow it to a single result. Simply click the option you need and it will transfer to the index field.

Now we have 'Purchase Order Out' as selected in the Document Type field. If we searched now, we'd return every Purchase Order stored in the system. We need to define the search more. We can do this by filtering the search down to a specific Supplier.







Document Type	"Purchase Order Out" <input type="checkbox"/>
Supplier	Ads <input type="checkbox"/> <input type="checkbox"/>
Date	<input type="text"/> Ads R Us
Supplier Account	<input type="text"/> Filtering <input checked="" type="checkbox"/>

In this case, we have done a search for 'Ads', which has returned the Supplier 'Ads R Us'. Clicking the result will complete the index field.

<input checked="" type="button" value="Reset"/>	<input type="button" value="Search"/>
Document Type	"Purchase Order Out" <input type="checkbox"/>
Supplier	"Ads R Us" <input type="checkbox"/> <input type="checkbox"/>

With two fields selected we can now hit the Search button to retrieve all documents that have been indexed with those terms:



< Change search   					
Type	Subsidiary	Project Number	Supplier	Supplier Account	Invoice No.
	Head Office		Ads R Us	ADS001	10001

In this case the search has returned just one document, a Purchase Order to Ads R Us. Note you can use any combination of index field searches to find the document(s) you need.

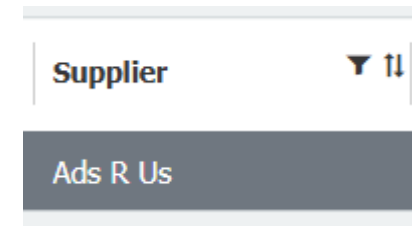
Fulltext Search

Because DocuWare reads the full document when it is stored, you can use Fulltext search to retrieve documents using any text you think might be contained within it. This is useful if you know what you want to search for is not indexed and therefore not going to be available in the index fields in the Search dialog.

Reordering & Filtering

Once a search has returned results, you can reorder and filter the results by each column of indexed data.

To the right of each column name when you hover over it are two icons; Filter and Reorder.



The Reorder icon will order the results alphabetically or numerically (depending on the column) in ascending or descending order (click to change).



The filter icon will open a 'Filter [column header]' box from which you can narrow the search results further.

The screenshot shows the DocuWare interface with a table of documents. A dialog box titled "Filter 'Invoice No.'" is open, allowing the user to filter the results by invoice number. The dialog box contains a search input field, a "Reset filters" button, a "Cancel" button, and an "Apply" button.

Type	Subsidiary	Project Number	Supplier	Supplier Account	Invoice No.	Invoice Da
PDF		TEST01	Pringle Supplier 1		PO000001	29/10/2025
PDF		TEST01	Pringle Supplier 2			



Here's an example of the results when filtering Supplier by 'Pringle*' (note the * - this is a wild card and tells DocuWare to "return results for 'Pringle' followed by ANY text" - see our downloadable guide for using wildcards to learn more):

< Change search ☰ ↕ ⌵ Reset filters						
Type	Subsidiary	Project Number	Supplier		Supplier Account	Invoice No.
		TEST01	Pringle Supplier 1			PO000001
	Head Office	TEST01	Pringle Supplier 1	PS1		PO000001

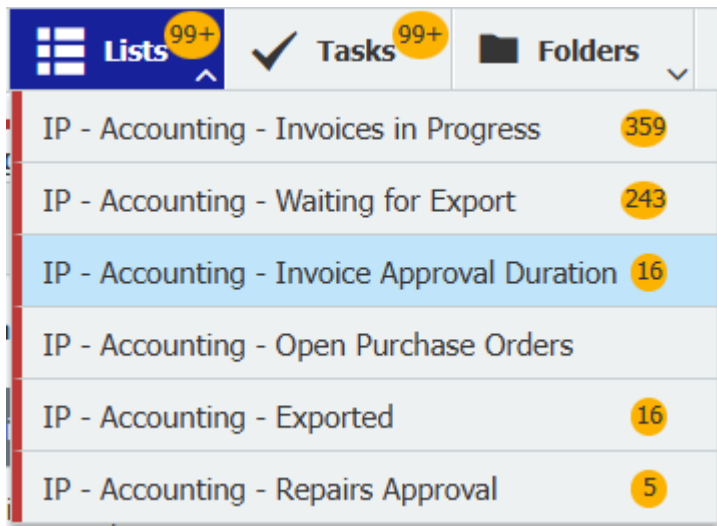


Lists & Folders

In addition to the powerful Search function, Lists and Folders are a quick way to access documents.

Lists

Some preconfigured lists have been provided.



Lists are accessed from the top tab bar alongside Search.



Working with Documents

Double-click on one of the document lines on the left and the document itself will open up in the viewer on the right or in a new screen if that is how you have configured your personal system (see the Personal Configuration documentation).

You now have several options to work with the document.



Tools

Display

100%

Annotations

Unit A1, Lingard Court
Lingard Lane, Stockport
SK6 2QU

Supplier
Ads R Us

Purchase

Ordered By
DemoAdmin

Order Date
09/12/2025

Purchase Order I
10001

Order Items

SKU	Description	Qty	Unit Price	Total Net
T1	Ad in DMS Magazine - Oct-Nov 25	3	1,500.00	
		3	1,500.00	

Required By
25/01/2025

Payment Terms (Days)
30

Subtotal (£)
4,500.00

Special Requirements

DemoAdmin
09/12/2025
Approve PO
Approve

Carriage (£)
0.00

VAT Rate (%)
20.00

VAT Amount
900.00



You can scroll through the pages of the document in two ways:

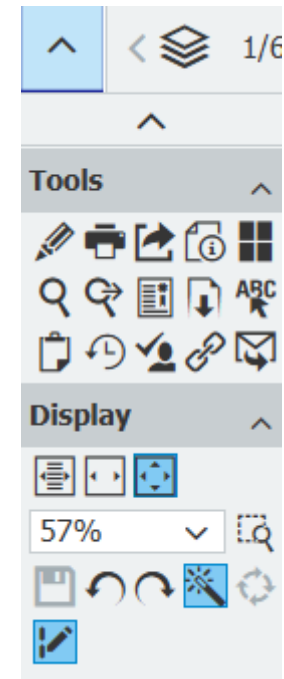
- Scroll down with the mouse wheel
- Use the arrow navigation at the top of the document, in the centre

Using the magnifying glass icons above the document to the right will zoom in/out for better clarity.

You also have a set of tools to the left of the document, which can be shown/hidden using the arrow. Again, your Permissions settings will determine which ones are available to you.

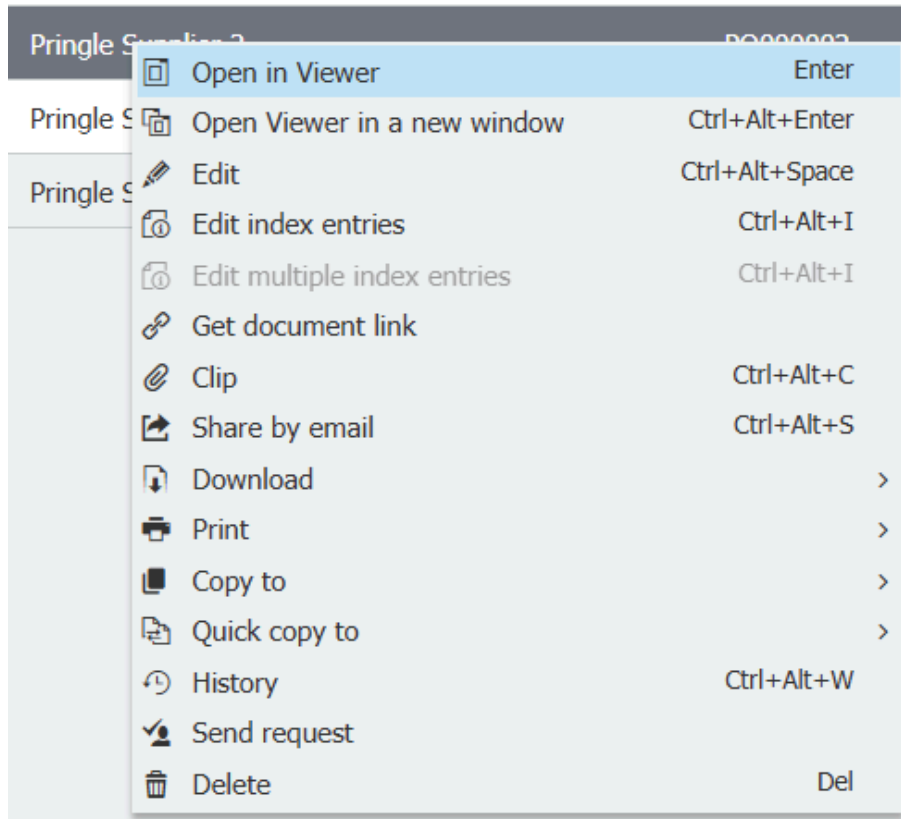
- Pencil icon - Edit document in Office
- Printer icon - Print the document
- Arrow icon - Share the document (with various choices)
- 'i' icon - View indexed entries of the document
- Squares icon - toggles the document view (single page/all pages)
- Magnifying glass icon - fulltext search within the document
- Glass/arrow icon - move to next instance of the fulltext search
- Document icon - view document change history (if available)
- Down arrow icon - download the document
- ABC icon - index the document with one click indexing
- Clipboard icon - toggles copy text to clipboard from document functionality
- Clock icon - views document workflow and change history
- Tick/silhouette icon - Send Request - ask for approval or decision on the document
- Chain icon - gets the direct weblink to the document
- Envelope icon - use to email document

The display tools allow you to zoom, fit to window, rotate and other options within the viewer.





Finally, there is a right-click menu available to you.



This replicates the Tools menu described above and is accessed by right-clicking the document line on the left. Again, your permission settings will determine which tools are available to you.



DocuWare Desktop Apps

DocuWare Desktop Apps are installed locally to provide additional functionality for users. They are required for Outlook integration and Smart Connect functionality.

They include:

- Connect to Outlook
- Export
- Import
- Scan
- Print
- Smart Connect

DocuWare Desktop Apps can be installed by individual users or organisation-wide by IT departments using Silent Set Up.

Individual User Installation Instructions: <https://start.docuware.com/blog/product-news/desktop-apps-easily-installed>