



DocuWare 7.13
User Manual
User Interface & Personal Settings



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Introduction

This document gives an overview of the settings each individual user has available to them to personalise their DocuWare experience and more suit their own job/tasks.

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.

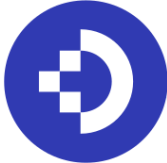
Peters Engineering looks forward to doing business with you.
 The undersigned agrees to the terms of this agreement.



DocuWare UI Key

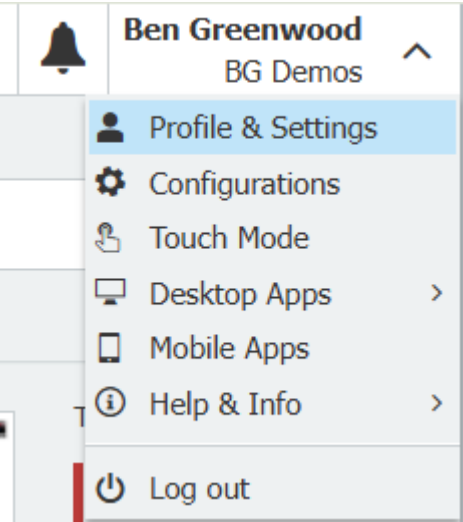
The items highlighted in bold relate directly to personal settings within DocuWare.

- 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. Note: If you have no access to Document Trays, this tab will not appear.
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



Profile & Settings

You access your Profile & Settings from the dropdown menu here:





You will be presented with this screen:

Profile & Settings [X]

Profile | General | Security | Document trays | Searches | Lists | Forms | Viewer

Personal Data

Complete your profile to easily reset your password in case you forgot it.

Email: ben.greenwood@keeley-travis.co.uk

Salutation: Please choose

First Name: Ben

Last Name: Greenwood

Receive tips and tricks to improve your daily work with DocuWare.

[Subscribe now](#)

Out of Office

I am not in the office! [i]

From: [Calendar icon]

Until: [Calendar icon]

[X] Reset [Save & Close]

The tabs along the top allow you to set various personal preferences within DocuWare.



Profile

Here you can:

- Set your email
- Set your salutation
- Set your first and last names

These will be configured for you already via your Microsoft sign in, but can be edited if necessary.

You can also subscribe to DocuWare's tips and tricks emails if you wish.

Finally, you can set your DocuWare Out of Office here. This is NOT the same as your Microsoft Outlook Out of Office. It should be set when you are on holiday so that any DocuWare Tasks assigned to you during this period are instead assigned to your substitute (configured in the system).

Remember to Save & Close!



General

Profile & Settings ✕

Profile **General** Security Searches Lists Folders Viewer

General

Startup view Last used items ⌵ ⓘ

Region

My language English ⌵ ⓘ

Date/Number format English (United Kingdom) ⌵

Date/Time example 11/12/2024 10:48

Number example 1,000,000.00

Diagnostic Mode

Enable diagnostics mode ⓘ

⊗ Reset Save & Close



Under General you have the following options:

- Startup View - sets the first screen you see whenever you log in to DocuWare
- Regional Settings - set your system language and date/number format

Your regional settings should be set from launch, but do check them to ensure they are English/United Kingdom

Finally, you can enable diagnostics mode. You would not normally ever need to do this.

Remember to Save & Close!

Security

Standard users will not need to use this tab.



Searches, Lists & Folders

Under these three tabs you can hide and reorder search dialogs, lists and folders.

A screenshot of a software interface titled "Profile & Settings". It features a horizontal navigation bar with tabs: Profile, General, Security, Searches (highlighted with a blue border), Lists, Folders, and Viewer. Below the tabs, the "Search Dialogs" section is visible, containing two entries: "Clients - Search" and "Document Types - Search". Each entry has a small eye icon to its right, indicating visibility settings. The "Clients - Search" entry has a green vertical bar on its left side, while "Document Types - Search" has a red vertical bar.

To reorder, simply drag-and-drop. To hide/unhide, click the 'eye' icon to the right.

The system will be configured to only show what users require, but this is where a user can personalise their DocuWare frontend experience.

Remember to Save & Close!



Viewer

Under the Viewer tab you can configure how you view and interact with documents.

Profile & Settings [x]

Profile General Security Searches Lists Folders **Viewer**

Viewer

- Show DocuWare Viewer always in the same window
- Open DocuWare Viewer in a new window
- Open DocuWare Viewer with index dialog in new window

Viewer Toolbars

Left toolbar

+	Navigation	
+	Tools	
+	Display	
+	Stamps	
+	Overview	
+	Related	

Right toolbar [i]

[x] Reset Save & Close



Viewer Options

- Show DocuWare Viewer always in the same window - documents will open in the viewer to the right of the search results
- Open DocuWare Viewer in a new window - opens documents in the viewer in a new window, ideal for working with two screens
- Open DocuWare Viewer with index fields in a new window - opens documents in the viewer in a new window, with the index fields on the left and the document on the right, ideal for editing index fields

Viewer Toolbars

Here you can choose which tools you want to see in both a left and right sided toolbar in the document viewer.

Again, hide tools you don't need by clicking the 'eye' icon.

Swap tools from left to right using the arrow icons.

Remember to Save & Close!



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>