



DocuWare 7.13
User Manual
User Management



Contents

- [Introduction..... 2](#)
- [Configuration Interface..... 3](#)
- [Creating a new DocuWare User..... 5](#)
- [Removing a User..... 10](#)
- [DocuWare Desktop Apps..... 11](#)



Introduction

This document gives a basic overview of DocuWare User Management, including how to create new users and assign them to pre-defined roles to give them the required rights and permissions.

DocuWare user permissions can be complex - this guide is intended for a basic set up only. Please contact Keeley Travis if you require more granular settings and permissions outside of those already created for you.

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



Configuration Interface

This is the DocuWare Configuration interface. Depending on the DocuWare rights and permissions assigned to you, you may see less options available to you. It is also subject to change in line with DocuWare's own developments.

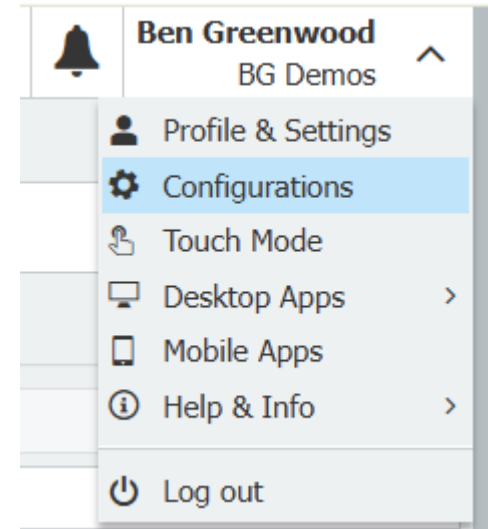
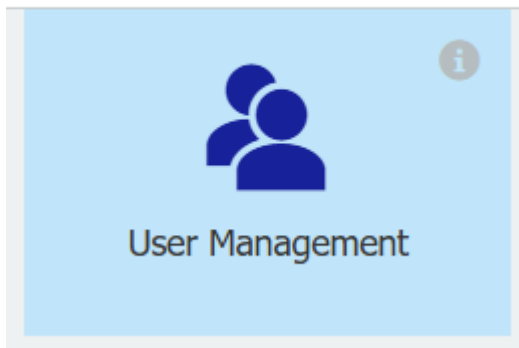
DocuWare
 Configurations
DemoAdmin
BG Demos

General	 Organization Settings	 Security	 User Management	 User Provisioning	 Audit Reports	 Mail Services
	 Text and Barcode Recognition	 Preconfigured Solutions				
Capture	 Document Processing	 DocuWare IDP	 IDP Monitoring	 Forms	 Outlook Email	 General Email
Index	 Indexing Assistance	 Intelligent Indexing	 Autoindex			
Document Storage	 File Cabinets	 Document Relations	 Deletion Policy	 Transfer		

To access the Configuration screen, simply log into DocuWare as normal, click your name at the top centre of the screen and choose "Configurations" from the dropdown menu.

For the purposes of this guide, you will access the User Management section by clicking the icon in the top centre of the first row.

Configurations





Creating a new DocuWare User

DocuWare **User Management** DemoAdmin BG Demos

Users Groups Roles Function Profiles Substitution Lists Substitution Rules

New user Export users as CSV Filter

Username	Email	Loc...	Active	Roles/Groups	Licenses
DemoAdmin	ben.greenwood@keeley-tr...		<input checked="" type="checkbox"/>		None

Above is the screen you see when you click the User Management icon. Here you can see a list of existing users, their email address, status, Role(s) they are part of and licence assigned to them.



To create a new user, simply click the yellow "New user" button. You will be presented with the following screen:

The screenshot shows a web form titled "New unnamed user" with a search bar containing the text "New unnamed user" (callout 8). Below the title is a tabbed interface with tabs for "General" (callout 1), "Groups" (callout 2), "Roles" (callout 3), "Function profiles" (callout 4), "File cabinet profiles" (callout 5), "Dialogs" (callout 6), and "Stamps" (callout 7). The "General" tab is active, showing the "Name and registration" section (callout 9) and the "Document Tray" section (callout 10).

Name and registration

- Title: Please choose (dropdown menu)
- First name: [text input]
- Last name: [text input]
- Email: [text input]
- Registration:
 - Request user by email to activate account and set password
 - Set password now
 - User's password never expires

Document Tray

- Create personal document tray



This is a breakdown of the options and functions available to you on this page, as numbered on the image. We start with the tabs across the top.

1. **General** - here you enter the user's salutation (optional), first name (optional), last name (optional), email address (required) and select your password preference. You can also choose whether or not to create a personal Document Tray for the user and which cabinet to attach it to.
2. **Groups** - some DocuWare set ups utilise the Groups function for assigning users (not covered in this guide)*
3. **Roles** - this determines the rights and permissions for the new user, as determined by the Roles set up in your system. These will have been set up when your system was built. The new user should be assigned to the appropriate Role under this tab.
4. **Function profiles** - more granular permissions (not covered in this guide)*
5. **File cabinet profiles** - more granular permissions (not covered in this guide)*
6. **Dialogs** - the store/search and result functions assigned to the user (not covered in this guide)*
7. **Stamps** - some set ups utilise Stamps for approval processes, for example (not covered in this guide)*
8. **Username** - this is where you set the user's username that they will use to log in to DocuWare. If your system uses Single Sign On via Microsoft or other provider, then this MUST match the format used in Entra etc.
9. **Name and registration** - where you enter the new user's personal details including name and email address.
10. **Document Tray** - where you choose whether or not the user needs a Document Tray - most DON'T need their own.

*Many of these will be determined automatically by assigning the user to a Role, so for most users do not need to be bothered with.



For the vast majority of DocuWare systems only the following are required to create a new user:

- Enter username (required)
- Enter first and last name (optional but preferred)
- Enter email (required)
- Choose password option(s) (required)
- Choose Document Tray preferences (required)
- Assign Role(s) under Roles tab to set their rights and permissions
- Click the yellow Save button

Your new user has been created.

DocuWare will attempt to assign an available licence to the new user - you can speed this up by clicking the edit button on the User Management screen:

Username	Email	Loc...	Active	Roles/Groups	Licenses	Edit
DemoAdmin	ben.greenwood@keeley-tr...		<input checked="" type="checkbox"/>		None	



Then click the Licences tab and assign one of the available licences, then click the yellow Save button:

DemoAdmin

General Groups Roles Function profiles File cabinet profiles Dialogs Stamps Licences

Assign license

Assign to user	License Type	Available
<input type="checkbox"/>	Named License	0
<input type="checkbox"/>	Workflow License	0

As a reminder, a Named licence allows users to interact with DocuWare fully. A Workflow licence allows users to view documents and carry out Tasks only - they cannot store documents.

If you chose to send an email to the user to set their password, then can now do so and log in. Alternatively, they can sign in using single sign on, if configured.

Please Note: If your system is using Single Sign On via Microsoft Entra or similar service then you may need to get your IT provider to add the user to the appropriate DocuWare group.

Once created, users can be edited, reassigned or altered by simply editing the user - by those with the appropriate rights, of course.



Removing a User

Staff come and go and it would be worthwhile knowing how to remove a user from the DocuWare system. This is our recommended process, as simply deleting a user account can cause many issues.

Firstly, deactivate the account by unticking the box under the “Active” column on the main User Management page:

Username	Email	Loc...	Active	Roles/Groups	Licenses	
DemoAdmin	ben.greenwood@keeley-tr...		<input type="checkbox"/>		None	
Test User	ben.greenwood@keeley-tr...		<input checked="" type="checkbox"/>		None	

This will ensure the user cannot log in.

Next, reclaim the licence by editing the user, navigate to the Licence tab and UNTick the licence field. Then click the yellow Save button. This will allow you to reassign the licence to a new user when required.

With the user now disabled and with no licence, they can no longer access DocuWare in any way.

The DocuWare organisation administrator should now identify any Tasks assigned to them and reassign them to another member of staff.

Once this is complete, you can delete the user account, though it is not necessary.



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>