

## DocuWare 101

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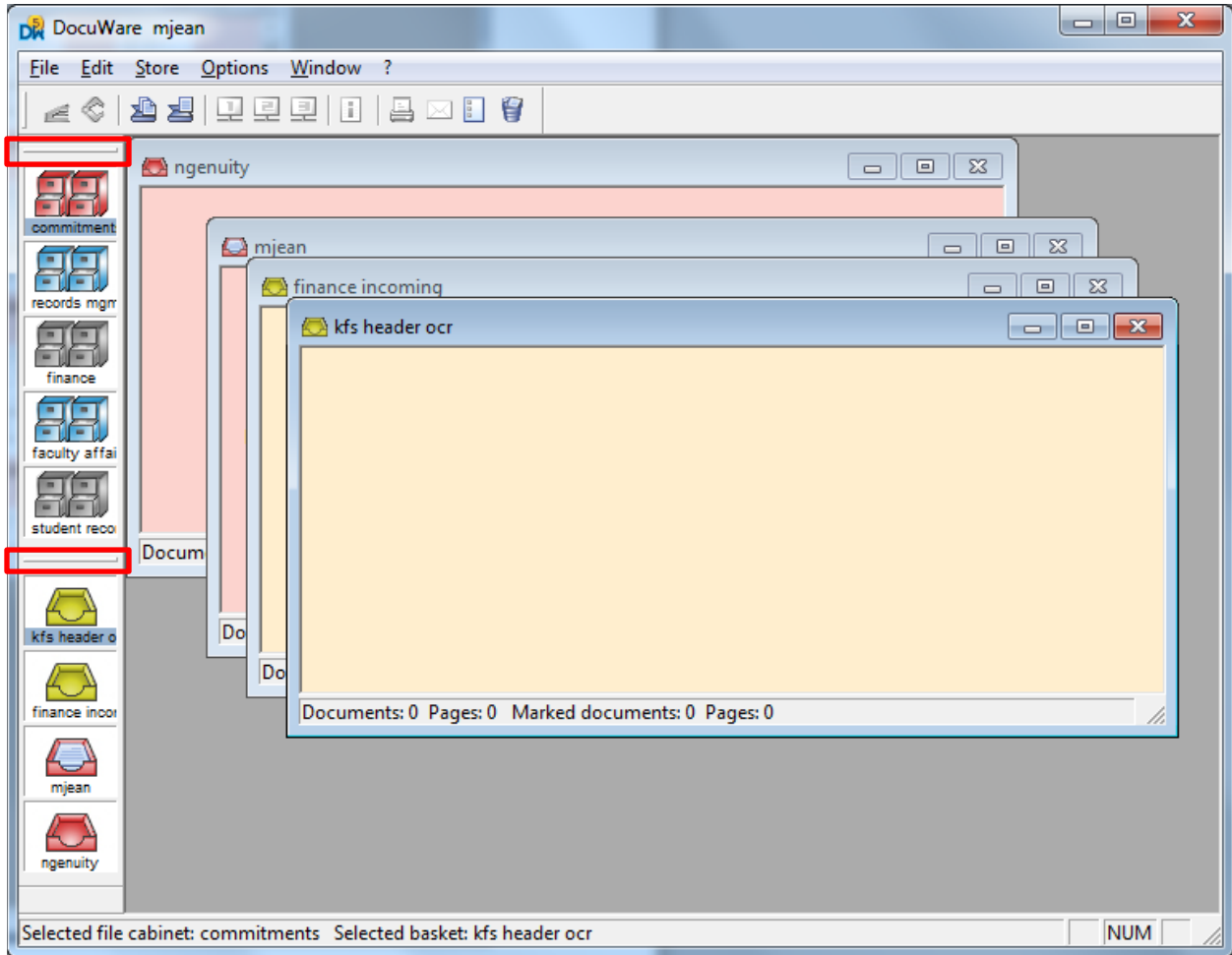
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## Main Window Overview

- DocuWare main window: On the left you will see all open baskets and file cabinets. You can change the appearance of your DocuWare window by clicking the bar just above your basket or file cabinets and drag the basket or file cabinet toolbar to other areas of your window.



## Menu bar overview

In DocuWare, you have a variety of ways to accomplish the same task. You may like to use keyboard shortcuts or you may prefer navigating through menu choices, or even using 'right-click commands' to accomplish the task at hand. Many of the options found in the Menu bar have the keyboard shortcuts to the right of the command so you can become familiar with these as you begin to use the system more. You'll find that a majority of your tasks will not require many of the options available to you within the Menu bar.

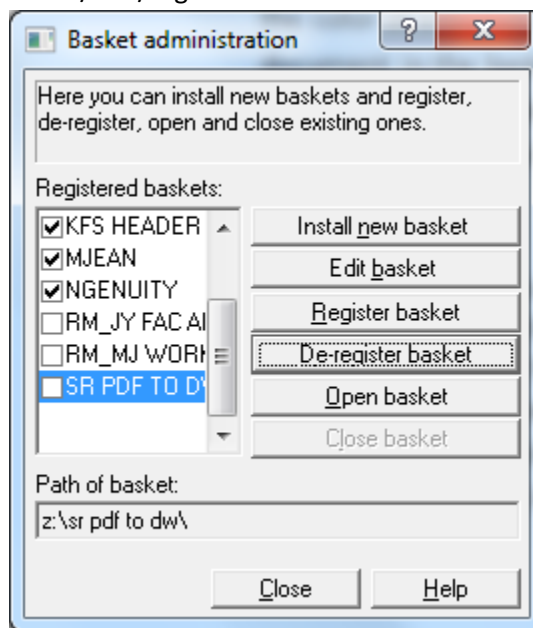
- **File**

- **Basket administration...**

Here you can define all settings pertaining to baskets (Creating a new basket, changing the color of a basket or selecting another recognition configuration for indexing the document in the basket).

***Basket administration***

- ✓ Install/edit/register



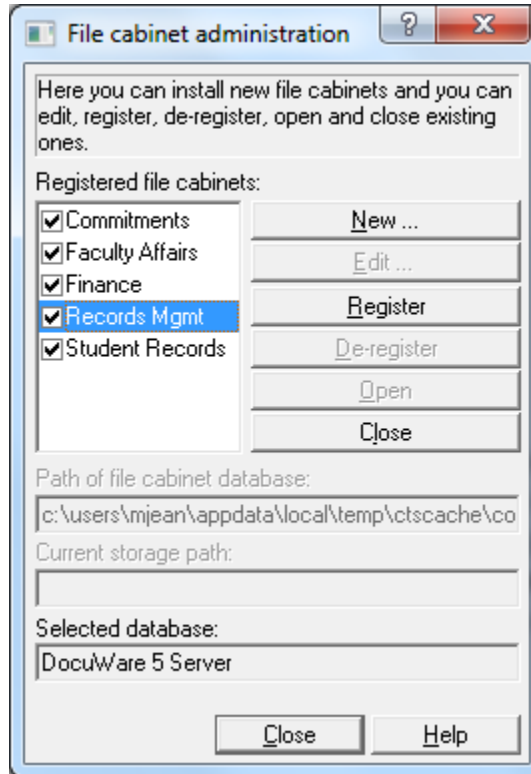
- **File cabinet administration...**

Here you can define all settings pertaining to DocuWare 4 mode file cabinets (Creating a new file cabinet or changing the settings of an existing file cabinet).

***File cabinet administration***

- ✓ Install/edit/register
  - Access to file cabinets is based on your user permissions set by your job function and management team. Getting access to additional file cabinets requires an email from the supervisor

over that unit specifying to COM-IT Records Management what access level is required. Or, the manager of that area can request file cabinet access through a Help Desk to COM-IT, which will be forwarded to the Records Management staff.



- Baskets and cabinets have the tendency to unregister from time if your computer has connectivity issues to the server. You will typically notice this upon login and will need to go into the Basket and Cabinet administration periodically and reselect your baskets and cabinets by clicking in the unchecked boxes for your available file cabinets or baskets.

- **Edit**

- Under the Edit menu, you will find a variety of options available to you. As mentioned above in the Menu bar overview, many of these options can be also be accomplished by right-clicking, using the toolbar, or using shortcuts.
- The Edit menu will display different options depending on whether you currently have a file cabinet or basket selected (highlighted). We will cover the Edit menu in training and look over some of the options you will most likely use.

- **Search**

- When you have a cabinet properly selected, the **name** of the cabinet will be highlighted in light blue as seen in the example below. Only when you have a cabinet selected will the 'Search' option be available in the Menu toolbar.
  - ✓ NOTE: If you do not have a cabinet selected in 'File Cabinet Administration' the 'Search' option will not display on your toolbar.
- You can also bring up the Search dialogue menu by double-clicking on file cabinet you wish to search.



- **Options**

- Under Options you will find a variety of different options to choose from although you probably won't access this menu much unless you prefer to turn on/off certain toolbars available to you in the DocuWare window.

- **Window**

- This is another avenue into your DW trash can.
- How you want to view your open baskets within DocuWare, such as tile or cascading.
- Allowing you to select which baskets and file cabinets you currently want active.
- SVGA... (Ctrl+F5) to open the Window Positions which you have selected and stored or those set to default for a screen resolution of 800x600 pixels.
- XGA... (Ctrl+F6)... to open the Window Positions which you have selected and stored or those set to default for a screen resolution of 1024x786 pixels.
- SXGA... (Ctrl+F7)... to open the Window Positions which you have selected and stored or those set to default for a screen resolution of 1280x1024 pixels.
  - ✓ Although you have different monitor configurations available to you here, your default settings will likely suffice unless you use multiple devices such as your desktop scanner and a laptop.

- **? (Help menu)**

- This is your Help Information resource center where you can research the functionality of DocuWare and its components. This is a full scale user manual available to you outside of this instructional document.

## Toolbar overview (under the Menu options)

- **Staple** 

Used for stapling multiple documents together in your basket.

- **Unstaple** 

Used for unstapling a document in your basket.

- **Scan Options** 

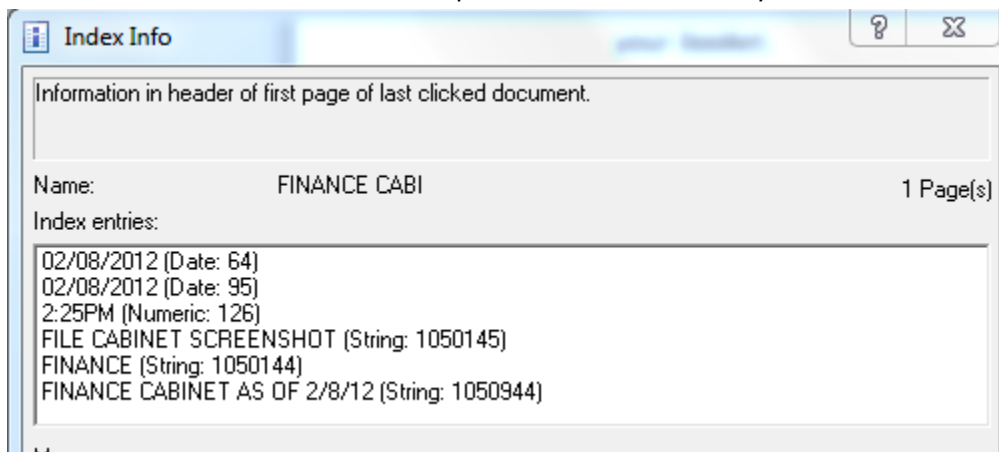
Unused unless you are using a desktop scanner to scan documents into DocuWare.

- **Display Windows 1-3** 

Allows opening of multiple documents from your basket in multiple viewers for comparison.

- **i –index info** 

Allows you to see all associated metadata that was indexed on the selected document. Also allows you to update any incorrect metadata in index fields and as well as allow you to see the store date and time of a document exported from a cabinet to your basket.




- **Direct Print** 



Will send your document directly to your default printer.

- **Send...** 

By selecting this option a copy of the document you currently have selected in your basket will invoke the command of opening a new outgoing email in Microsoft Outlook with the document attached. Keep in mind that the format of the document will be the same format in which it was stored into the system. Most documents that are scanned in our office are TIFF format and may present difficulties opening by the recipient of the email. By using the Web Client to perform this function the email attachment will always attach as a PDF, which is a more universally recognized format.

- **Pending box...** 

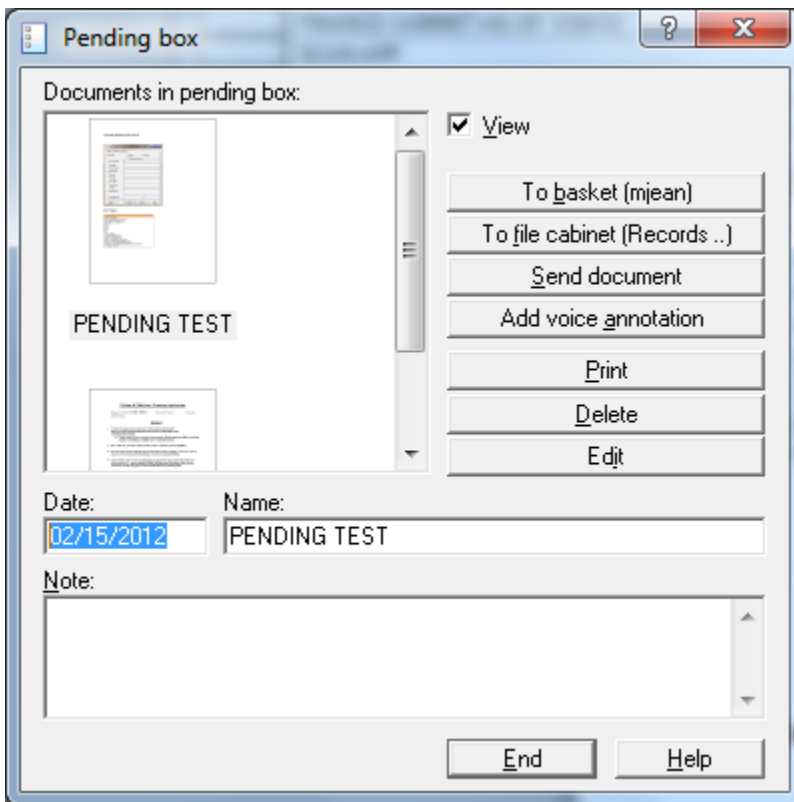
This option will show any documents currently within your Pending box. To place a document in the Pending box, you have to invoke the command of sending a document from the Results List to the (To Pending box... ). To do so, select the document(s) in the Results List and click on the icon .

Once you place a document into your Pending box, your icon will change from  to  to signal that you currently have pending documents to review.

Adding documents to your Pending box creates a 'copy' of the source document and places it into your Pending box and will not flag the document in the Results List. If you choose to use the Pending box, **do not** store the copy of the document from the Pending box as this will create multiple copies of the document in the file cabinet and create confusion about the original store date of the document.

After opening your Pending box you will see all documents currently pending. By selecting a document using a single-click, you will see the **Date** field and the document **Name** field. The **Date** field is the **original store date** that you will use to access the source document for processing or editing and the **Name** field will provide you with the name of the document (see below). The Pending box should only serve as a reference reminder to identify documents that need further review for processing or editing. Once you've performed the necessary action on a

pending document, you must remember to manually delete the reference copy from your Pending box.



- **Trash can** 

Will show your trash can with all documents you've deleted from your basket.

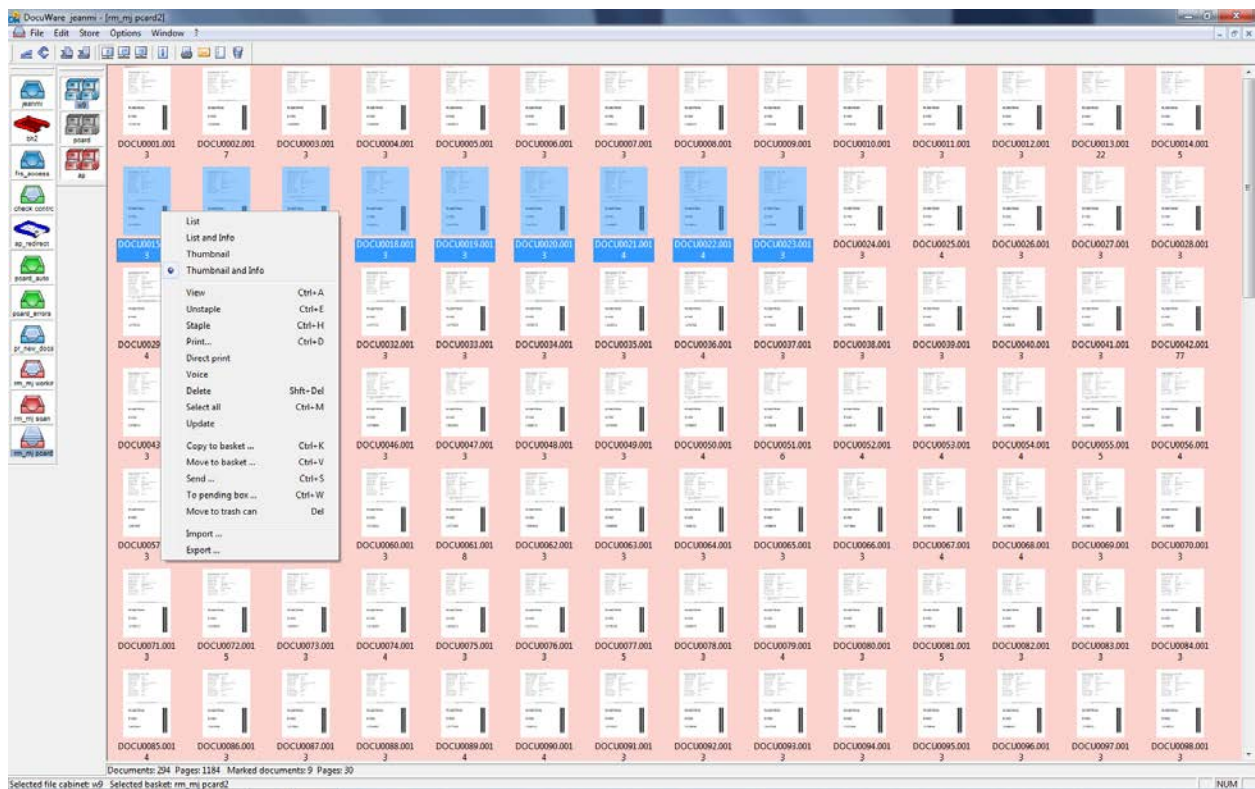
## Baskets


- Think of DocuWare baskets just like normal office in -baskets found in an office environment. Documents can be added and removed by selecting the entire basket's contents or just a single document at a time. You'll see an image icon of a 'stack of paper' within your DocuWare basket if it currently contains documents. Don't rely on the size of the stack in the image icon to give you any indication as to how many documents are contained in your basket. It's just a visual indication to the user that documents exist in a basket. The Search Dialogue for cabinets is not available for baskets. Remember, unless someone else registers your basket, they will not be able to see your documents. This is important to remember in case you aren't in the office and someone needs to see a particular document you may not have yet stored in the corresponding file cabinet.
  - **Page count displayed** at the bottom of an opened basket in DocuWare is where you can see how many documents and pages are actually contained within the basket. To the



right of that number is another set of numbers that shows documents and pages currently selected/highlighted within that basket. If you have PDF or Microsoft Office native format documents in your basket, these will only show as 1 document and 1 page although the document may actually contain multiple pages. (See '**Understanding the DocuWare Viewer**' below to learn how to navigate through pages of documents not stored in DW Tiff format).

- **Moving documents** from basket to basket. You can select documents and drag them from one basket to another (single or group of documents), or...
  - You can select documents to move and press Ctrl-V and then choose desired destination basket to transfer the selected documents to.
  - Right-click for menu options on selected documents (Example shown below).



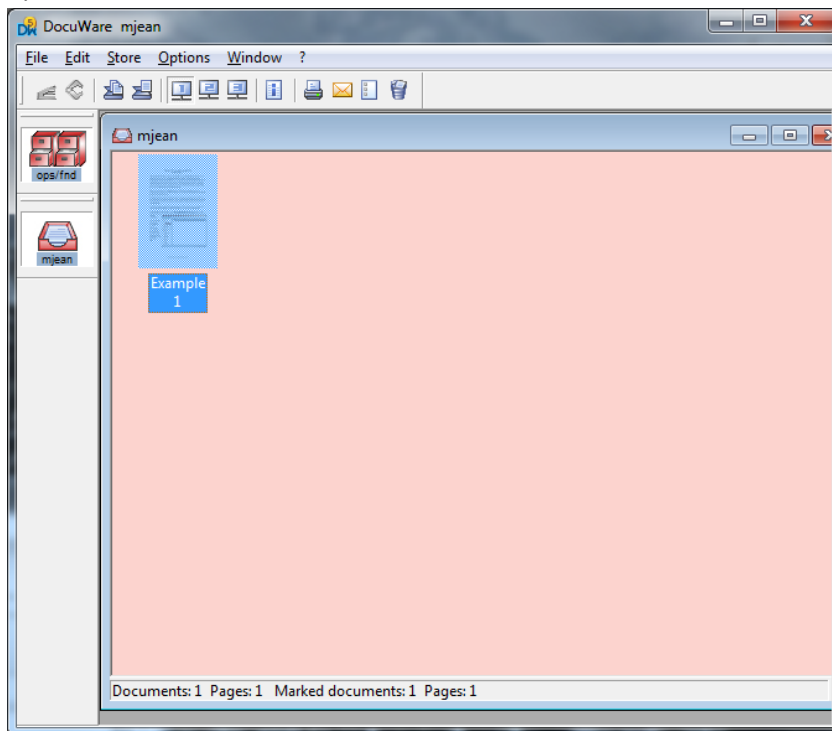
- A **DWS** image icon  appearing as a document in your basket usually indicates that this document was moved by another user or the image file or file path is corrupt.
- Half-page or incomplete images of documents in your basket will give you an *“image could not be read”* error message when trying to view the document. This will sometimes occur if there is a hiccup in the transmission of a scanned document from the scanner into DocuWare. If you see this icon, try right clicking and refreshing your basket...it should disappear. If not, please contact COM-IT Records Management.

- **Updating baskets-** Refreshing your basket will allow you to see recently added documents. Baskets that are *Centrally Managed* will automatically update for all users when documents are added or removed. A centrally managed basket must be set up by an Administrator.
- If you ever see that your basket is reporting that pages exist within, but you have no documents in your basket, please notify COM-IT Records Management as this is caused by corrupt files and needs to be removed manually by an Administrator on the server side.

## Storing documents

- **Permissions:** You can store documents into your department's file cabinet(s) as long as you've been assigned WRITE permissions. These permissions are decided by your DocuWare project sponsor, who is typically a Business Manager, Supervisor or Department Head.
- **File Types:**
  - **PDF:** DocuWare can store a variety of file types. If your department relied on COM ITS – Records Management to scan and store your files, your files are typically stored in PDF format. PDF format is the most commonly accepted file type for long-term storage and satisfies records management best practices for storing electronic documents. PDF is also the preferred file type when sharing files, as they allow the recipient of a file a globally recognized file type that is easy to open without needing special software to view a file.
  - **TIFF:** This file type is used for projects where we are able to take advantage of using OCR (Optical Character Recognition) for scrapping information automatically from a document and importing the information into fields within your DocuWare file cabinet. This file type is also used for barcode recognition, which depending on the type of scanning project, may be used to separate the documents during the scanning process as well as providing a match code (embedded in the barcode) to reference an external database (CSV file, Access database, etc.) and automatically pull in all associated data to that match code. For example, many of you are familiar with the university's P-Card (purchasing card) process. The header sheet that you print out from UA Financials when preparing to send your receipts to the Financial Service Office contains information that uses OCR. The Transaction ID is automatically read from the header sheet during the scanning process using OCR technology. This Trans ID# then references an external report sent to the university by JP Morgan Chase and pulls in all associated information related to your purchase (date, amount, cardholder name, etc.). This cuts down the amount of time it takes to properly and accurately index data into your file cabinet fields by which you can search by later.
  - **Microsoft Office:** We call these files 'Native Format' files in regards to DocuWare. When storing a native format document in DocuWare, you can later modify this document by right-clicking the document in the Results List after it's been stored into a DocuWare file cabinet.

- **Importing files for storage:** There are a few different ways to import files into DocuWare for storage.
  - **Dragging and Dropping:** You can click on a document and drag it directly into a DocuWare basket. Once in your basket, you can select the document and store it into DocuWare.
  - **COM-ITS RM:** If you're having the Records Management team scan for you, we will perform all scanning and storage for you.
  - **MFD (multi-functional device):** A MFD is typically a copier/scanner such as a Xerox, Ikon or Canon device, which can double as a departmental scanner. COM ITS-RM sets this up for you should your department decide to use their MFD for daily scanning. After the MFD is set up, you will be able to scan a document at your MFD and the document will automatically land in a DocuWare basket where you can select and store the document into your file cabinet.
  - **Desktop scanner:** Desktop scanners allow you to scan documents at your desk. The documents will land in a specified folder where you can select them and drag and drop them into a DocuWare basket for storage.
- **Storing a document:** To store a document it must first be imported into a DocuWare basket. You then select the document so that it appears highlighted blue and select the file cabinet that you wish to store the document into, which also must be selected (highlighted blue). Once both the document(s) and the file cabinet are selected, you will then see the option to '**Store**' show up in the Menu Bar.



- Click on Store
  - An image of the document you are about to store will open alongside of the Storage Dialog where you will key in the rest metadata to properly index the document to be able to retrieve it later when performing a search for the document. This is also the appropriate time to add text overlay notes, electronic stamps or highlighting to the document (SEE [Understanding the DocuWare Viewer](#) for all options).
- Choose the desired indexing options
  - In the top of your Storage Dialog window you will find the following checkbox options.

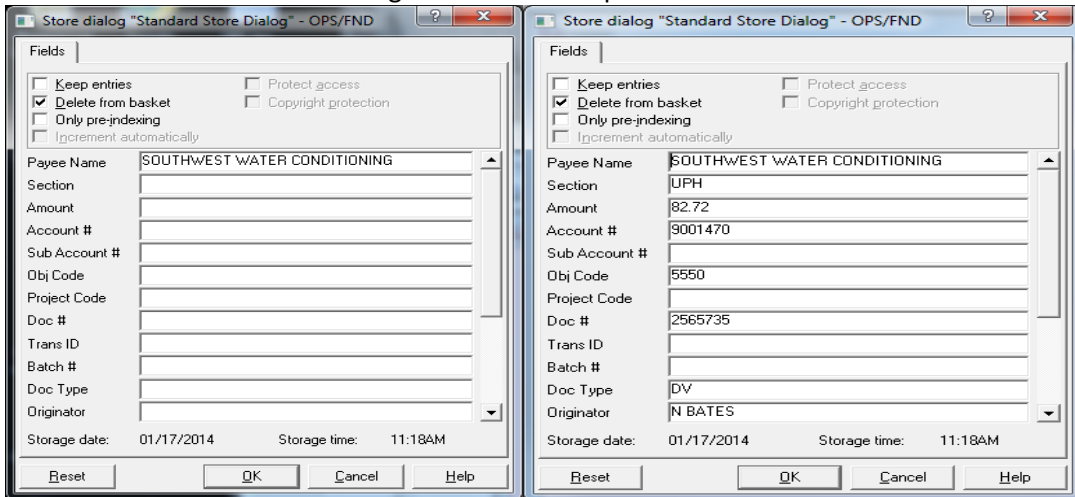
- ✓ **Keep entries**  
This option is used if many entries are the same. An example is records with multiple documents for the same person or vendor. Using Keep Entries, all the index fields become static entries (name, DOB, etc.) can be kept between documents. Only the variable information needs to be changed without re-keying the other information.
- ✓ **Delete from basket**  
When a document has been indexed with all required fields, Clicking Ok or using Enter, the document will be stored instantly in the file cabinet and deleted out of the basket.  
*Pros:*  
The documents are instantly available to the end user to look up.  
*Cons:*  
The ability to attach, skip, and delete at the time of indexing is not available.
- ✓ **Only pre-indexing**

With this option the user has the ability to attach to, skip, and delete a document while indexing multiple documents from a basket. Using “Only pre-indexing” can be faster than moving the documents to the file cabinet and then deleting them from the basket after every index. Only pre-indexing quickly sends each document back to the basket for storing an entire batch when indexing is complete. It also allows the user to double-check their indexing before committing the document(s) to the file cabinet.

After pre-indexing an entire batch of documents you can click on Edit in the menu bar and choose the option of ‘Automatic Storage’. DocuWare will then take all of your pre-indexed documents and store them automatically into the selected file cabinet.

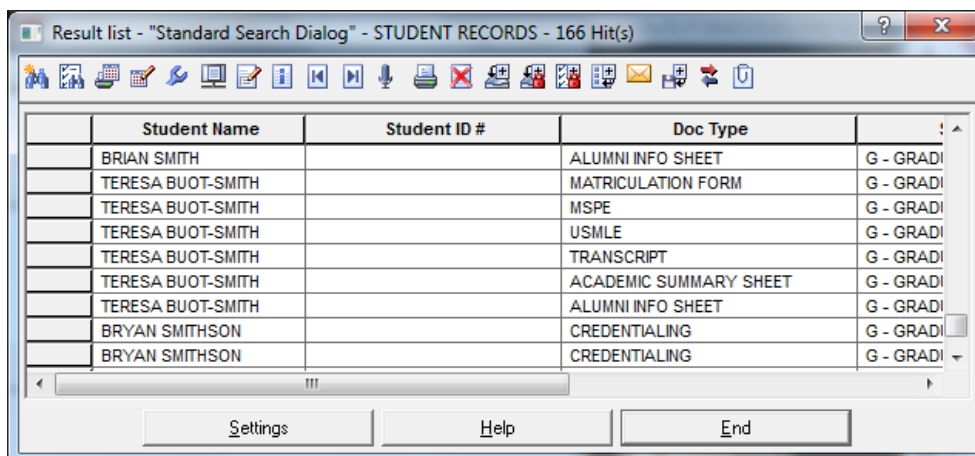
- **Manual AUTOINDEX**

This is a handy option for auto-populating indexing information on documents that have related documents previously stored in the file cabinet. For our example, you can enter the Payee Name and then right-click in the field after the name and choose, Manual AUTOINDEX from the available options. The system will pull in all information stored for this vendor previously. Keep in mind that you will need to change all fields that may not relate to the document you are storing, but information such as the account used to pay for this vendor will not need to be changed and can be kept.



## Searching for documents

- There are many ways you can search for documents within DocuWare file cabinets. In COM we rely on “**key identifiers**” (e.g. Student ID Number, Document number or Student Name).
  - But, you can also perform searches by using different search options in combination to narrow your search.
  - You can also put in a date range, or a date range and any combination of search data for a particular document to narrow down your returned results to a specific time period. For example, if you wanted to see all invoices added to the file cabinet within the past week, you could search the date range for that week to only bring back recently added invoices in your Results List.
  - **Wildcards\*** are helpful when searching for DocuWare documents. You can enter an \*(asterisk) symbol before a *last name* and DocuWare will return all matching possibilities in the **Result List** with any combination of first name/last name and/or any names where the last name you entered is located somewhere in the last name. For example, when we search for **\*Smith** we will get hits like **Bob Smith** or **Tim Blacksmith**.
    - The same rule applies if you only know a *first name*. You'll enter the first name and then type in a \* symbol after the name and DocuWare will return any record containing that first name. For example, when we search for Anna\* we will get hits like Anna Smith or Annabel Wilson.
    - Wildcards can be placed on both sides of any search criteria resulting in a much larger return of possible matches. For example, **\*Smith\*** will return any entries containing Smith somewhere in the name (see example below).
    - After you enter your search criteria and click OK, the **Result List** will appear. This is where you'll see exact or near match results that you can choose from.



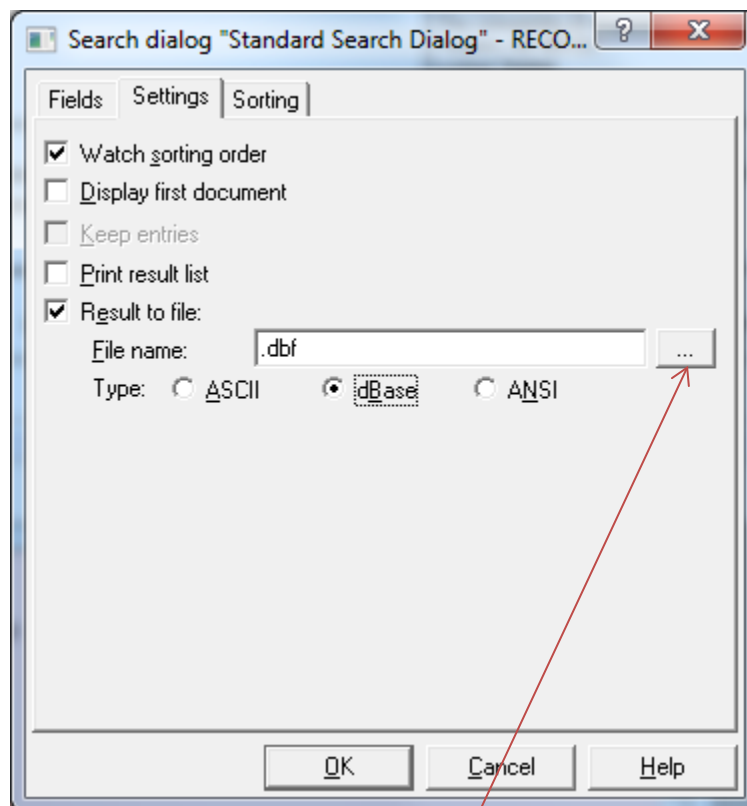
Result list - "Standard Search Dialog" - STUDENT RECORDS - 166 Hit(s)


Student Name	Student ID #	Doc Type	
BRIAN SMITH		ALUMNI INFO SHEET	G - GRADI
TERESA BUOT-SMITH		MATRICULATION FORM	G - GRADI
TERESA BUOT-SMITH		MSPE	G - GRADI
TERESA BUOT-SMITH		USMLE	G - GRADI
TERESA BUOT-SMITH		TRANSCRIPT	G - GRADI
TERESA BUOT-SMITH		ACADEMIC SUMMARY SHEET	G - GRADI
TERESA BUOT-SMITH		ALUMNI INFO SHEET	G - GRADI
BRYAN SMITHSON		CREDENTIALING	G - GRADI
BRYAN SMITHSON		CREDENTIALING	G - GRADI

Settings Help End

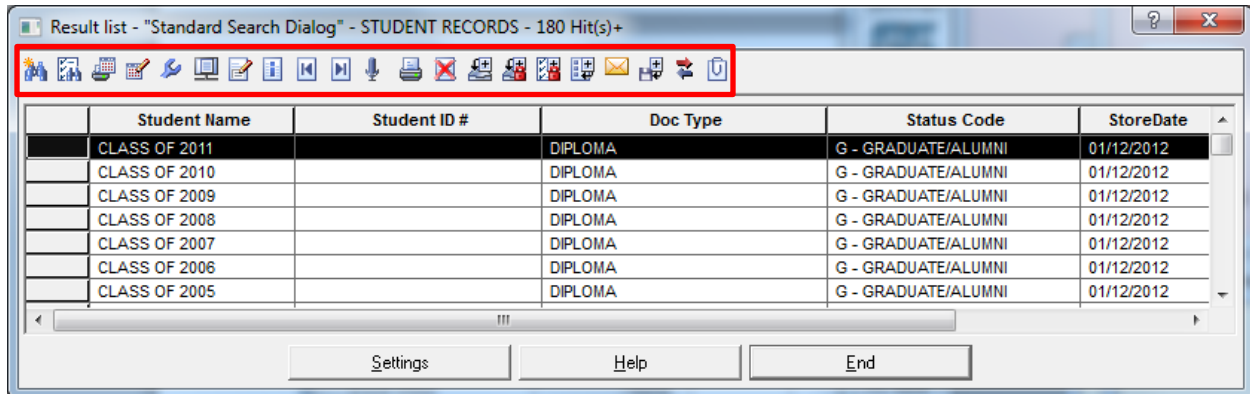
## Creating Microsoft Excel reports with the Results List

- In DocuWare you have the ability to create a database file of the Results List showing all content of a particular file cabinet, which you can import to a Microsoft Excel document. To do so, perform the following steps.
  - Double-click the file cabinet and choose the Settings tab with the following options (see below)



- Next, click on the browse button  to select your file destination and name your file.
- After storing your file and attempting to open it for the first time, you will need to choose Microsoft Excel for your preferred program to open the file for it to display correctly.

## Understanding the Results List



The screenshot shows a window titled "Result list - 'Standard Search Dialog' - STUDENT RECORDS - 180 Hit(s)+". The toolbar contains icons for: New search, Nested search, Print Results List, Settings, Help, and End. The table below displays the search results.

Student Name	Student ID #	Doc Type	Status Code	StoreDate
CLASS OF 2011		DIPLOMA	G - GRADUATE/ALUMNI	01/12/2012
CLASS OF 2010		DIPLOMA	G - GRADUATE/ALUMNI	01/12/2012
CLASS OF 2009		DIPLOMA	G - GRADUATE/ALUMNI	01/12/2012
CLASS OF 2008		DIPLOMA	G - GRADUATE/ALUMNI	01/12/2012
CLASS OF 2007		DIPLOMA	G - GRADUATE/ALUMNI	01/12/2012
CLASS OF 2006		DIPLOMA	G - GRADUATE/ALUMNI	01/12/2012
CLASS OF 2005		DIPLOMA	G - GRADUATE/ALUMNI	01/12/2012

- **New search** 

Start a new search. The entries you made in the database fields for the preceding search remain intact. You can modify the entries as necessary without having to enter everything all over again.

- **Nested search** 

A nested search is a search that is not run across all documents in a file cabinet, but only on those listed in the current result list displayed. This type of search is useful for refining the search in order to narrow down what you are looking for specifically.

When you click the button, the empty search dialog opens in which you can enter the additional search words. The system automatically links the new search words with those of the initial search. You then receive the result list of the nested search. If you click the **Nested Search** button again within this result list, the search dialog from which you started the nested search is displayed once more containing your original entries.

- **Print Results List** 

This is an option available to print the results list. The printed data will not look exactly like the Results list, but will be in the same sequence of fields.



- **Change field** 

This setting is typically reserved for DocuWare Admins. Change field allows you to modify previously indexed metadata on documents from the results list. If you want to edit **one** field entry for **multiple** documents, select the respective documents in the result list and then click this button. The field entry can be changed in the dialog window, 'Modify field entries'. (This function is **not** available in the results list after a search across multiple file cabinets).

If you want to edit multiple index fields, please repeat the described process for each of these fields.

- **Settings** 

This option allows you to change the way your Results List displays, but it's recommended to leave it set to default settings.

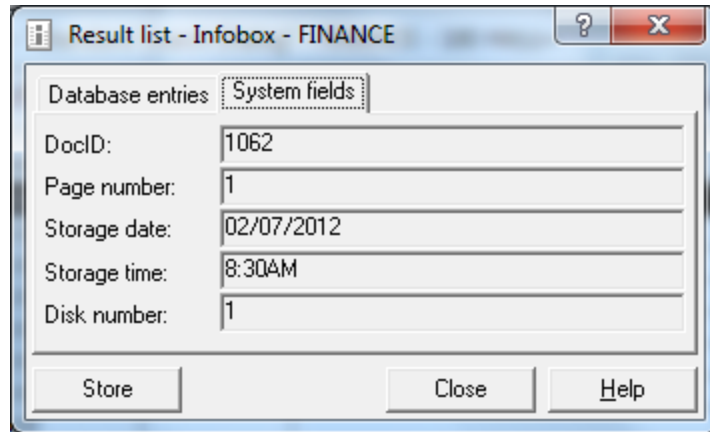
- **Display Window** 

Allows you to open a display window of the document you currently have highlighted within the Results List.

- **InfoBox** 

If you want to edit database entries of **one** document from within the result list, select the document in the result list and click on the button, **Infobox**. The dialog window **Result list-Info Box** is opened. Then perform the modifications in the tab **Database entries**. In order to save these changes, click on button Store.

The **Systems Field** tab allows you to see details about the document such as store date and time.



- **Display Previous/Next document**



Using this option in the Results List will move your selection to the previous or next document and open the document in the DocuWare Viewer window. You can also just double-click on the document you want to view specifically. Documents stored as color, grayscale may require a right-click to display them. Also, if you want to open a Microsoft Office document in its native format to edit the document, you'll need to right-click it to make edits. If you simply want to view this document, you can just double-click it.

- **Voice**



You have the ability to store voice annotations to a record in the file cabinet; however we don't use this option due to the size of the audio files.

- **Print Selected Documents**



This option will send the selected documents to your default printer.

- **To Selected Basket**



This option will take the selected document and drop a copy of it into your basket. This is useful for modifying a document currently stored in the file cabinet. You can unstaple the document and remove pages that may not be required. You will need to store the document and request deletion of the version no longer required. Keep in mind that this will change the actual store date.

- **Checked Out documents**



In DocuWare you can check out documents in file cabinets, so that they cannot be modified by other users. This function is invoked in the result list via the Check-Out button. The check-out function is designed as a version control mechanism. A document has been changed and/or added to, and is stored as a **new** document in the file cabinet. The old version is then retained as a back-up. Keep in mind that if you check-out and check-in a document by storing it, the store date will change. It would be good practice to place a note in the **Text Annotation** (stick pin) of the document noting the original store date. This is especially important for any documents that require a hard copy retention period. Documents that are currently checked out will have an “I” in the left hand column of the results list indicating they are out. Only the user, who checked them out, or an administrator, can unlock the documents.

If a user accesses a locked document, the following functions will not be available:

- editing the document
- adding another check-out
- updating of protocol fields

The following functions will still be available:

- displaying the document in the viewing program
- printing
- migration to a different file cabinet
- copying to a basket
- exporting to another file cabinet


- **Show/Hide checked-out documents** 

Click this button to see all checked out documents (indicated by “I”).

- **To Pending Box** 

This option is not recommended.

- **Send...** 

This option allows you to send the currently selected document via email in Microsoft Outlook. It will send the entire document from the Results List. If you want to just send a particular page of the document, open the document in the DocuWare Viewer and select . Next to the envelop icon you’ll see a drop-down menu where you can select ‘*send current page*’.

The document will attach to the email in the format it was stored. Many of the documents that will be stored will be in Tiff format (.tif). If you want to send the document as a PDF, open the DocuWare Web Client and send it from there. All documents are uploaded in PDF format using the Web Client.

- **Export** 

Just as it is possible to import documents (files), you can also export documents from a basket to other directories, to other hard disks or other storage media.

Mark the file that you want to export, then from the main menu click **File** then **Export...**. The dialog window **Export** will be opened.

The dialog window has the following structure:

***Export to directory***

Here you specify the directory to which the files are to be exported. To do so, either move the cursor into the box and make your specifications, or click on the browse for

folder button  and select the desired directory in the folder-select box.

***Use original file names***

If you activate this option, files that DocuWare has already imported but not converted will be exported with the names the original files had before they were imported.

- **To Other File Cabinet** 

This option will allow you to move a copy of the selected document into another DocuWare file cabinet for storage. Keep in mind that you'll need to go into the cabinet that has received the document to modify the index field entries if this cabinet's index field structure is not identical to the file cabinet you sent it from.

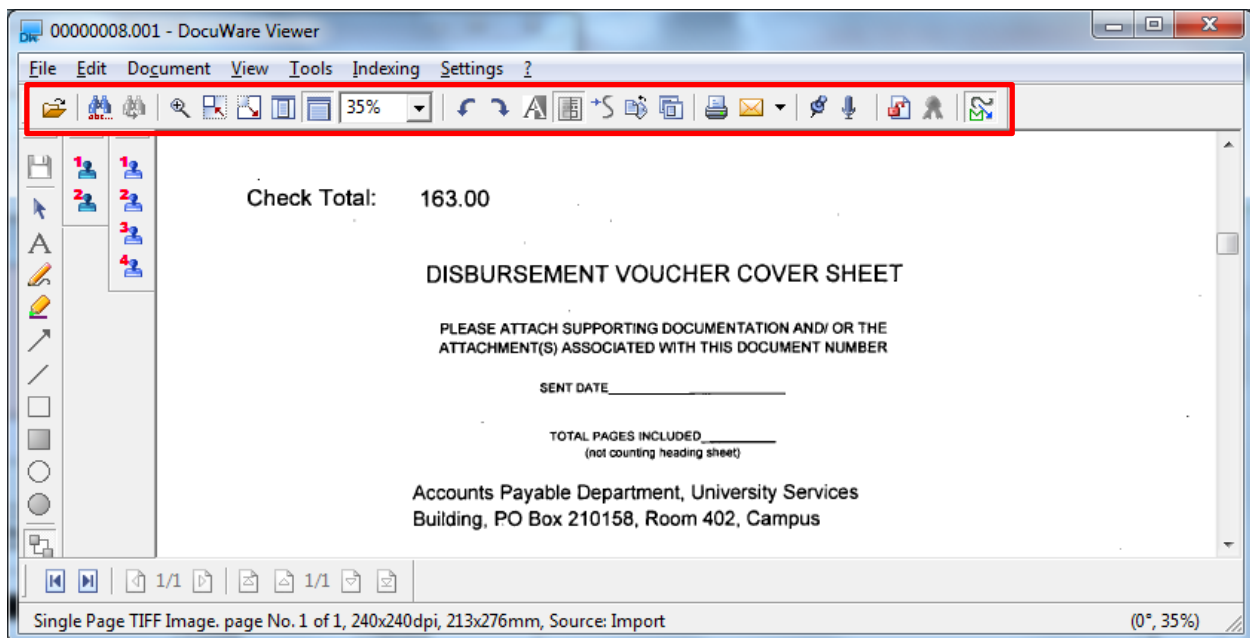
- **Append** 

This option allows you to append a document that is in your basket to the document you currently have selected in the Results List. For example, if you want to append a follow up email to a particular record you would print the email to Tiffmaker5. This will place a copy of the email in your DocuWare user name basket. From here, you can call up the record in the Results List; select the email in your basket; click the append icon and the email will be attached to the end of the document/record. Then, open the

document and place an electronic 'Append' stamp on the email portion of it to indicate that these pages have been appended.

## Understanding the DocuWare Viewer

When you open a DocuWare document the image will appear in the DocuWare Viewer as seen in the example below. Located in the toolbar of the viewer are a variety of tools to assist you in reviewing documents. Listed below are the tools that we'll cover.



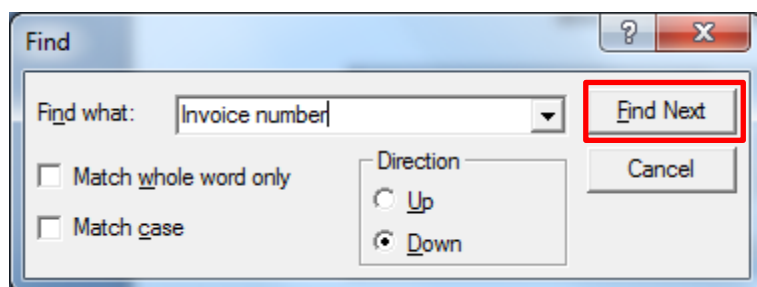
- **Open** 

This function will not be used.

- **Find**  and **Find Next** 

Within the viewer you have the capability to perform a text specific search. This will allow you to enter keywords you might be looking for on a document such as 'invoice number'. After you enter your search criteria the full text search function of this tool will highlight all matching information.

'Find Next' will locate the next instance of the word you are searching for and highlight it. Or you can just click on the Find Next button in the Find window as shown below.



- **Zoom in segment** 

By selecting this tool you will be able to zoom in on a specific area of a document by clicking this icon and then clicking-and-dragging a box around the information you would like to magnify. You can also use the first two icons shown below.

- **Zoom Out, Zoom In, Display Complete Page, and Display Full Width.**    

All of these tools will allow you to modify your viewer display while reviewing a document.

- **Zoom Percentage** 

Magnification percentage for zooming in/out on an image.

- **Rotate Left and Rotate Right** 

This tool will allow you to turn the document in the DocuWare Viewer.

- **Invert Image** 


This tool will invert the image, changing black to white and white to black. You probably won't use this option much, but it's nice to have when you can't make out what a particular word says.

- **Display Improvement** 

This tool will sharpen the text on a scanned image where the letters may appear to be a bit fuzzy.

- **Line enhancement** 

This tool should enhance text where the letters are a bit choppy, although you probably won't see much improvement.

- **View All Pages of the Document** 

This tool will allow you to view a multi-page document in thumbnail view in the DocuWare Viewer. This is helpful when you are looking for a specific page of a document without having to page through to find it. Once you find the page you are looking for, you can double-click the thumbnail to expand the document to the entire window of the viewer.

- **De-skew** 

De-skew allows you straighten up the orientation of a document in the DocuWare Viewer. This option won't be used much unless you are scanning your own records and your scanner has the tendency to pull in paper crooked.

- **Create a copy of this window containing current document** 

This tool is handy if you want to look at 2 different pages of the same document at the same time in separate viewers.



- **Print** 

Print the document to your default printer.

- **Mail** 

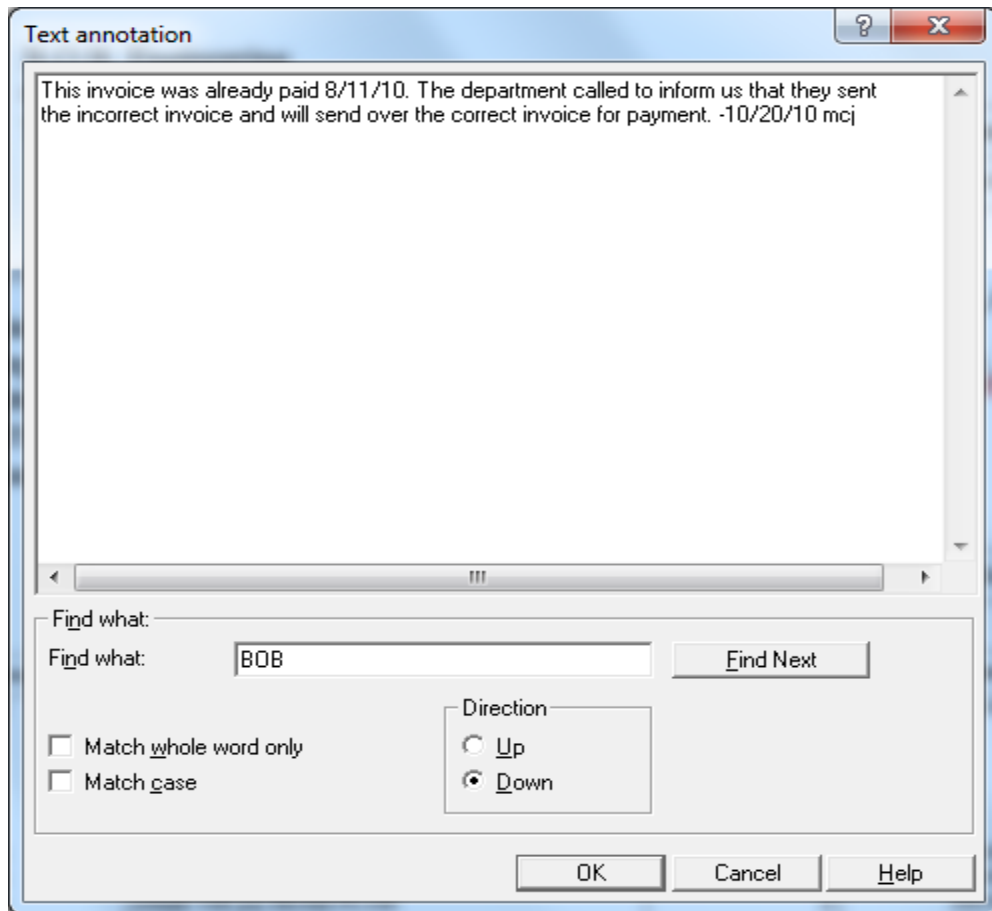
This tool will attach either the current page or the entire document to a new outgoing email message in Microsoft Outlook. Use the drop-down menu to view your choices.

- **Text Annotation** 

This tool is commonly referred to as 'Stick Pin Notes'. If there aren't any notes on a document, the stick pin will appear blue . If there are notes, the stick pin will appear red . Notes on a document should always be placed on the first page of the document due to the ability to add notes to each page. Keeping them on the first page provides a visual reminder that notes exist on the document. Below you will see the uses of stick pin notes.

- ✓ Stick pin notes should be used to notate all correspondence regarding the related record.
- ✓ This area should be used to place all notes and information required to process a document.
- ✓ It's important that you place your initials and the entry date on every entry in the notes so we can track the audit history on the document.

**IMPORTANT:** Never erase entries within the stick pin notes.



❖ At the bottom of the DocuWare Viewer you will find your **Next Document** and **Page Forward by One Page** tools.

- **Next Document** 

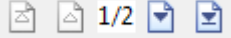


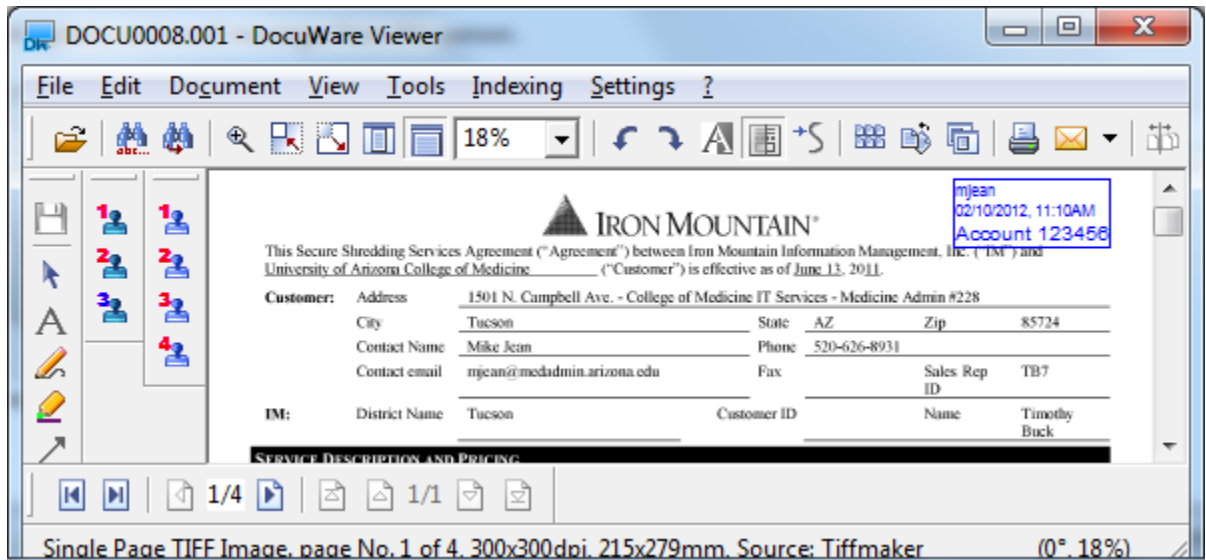
This tool is used to display the next document in the Results List or your DocuWare basket.

- **Page Forward by One Page** 

This tool is used to page-forward on multiple page documents (Tiff format only).

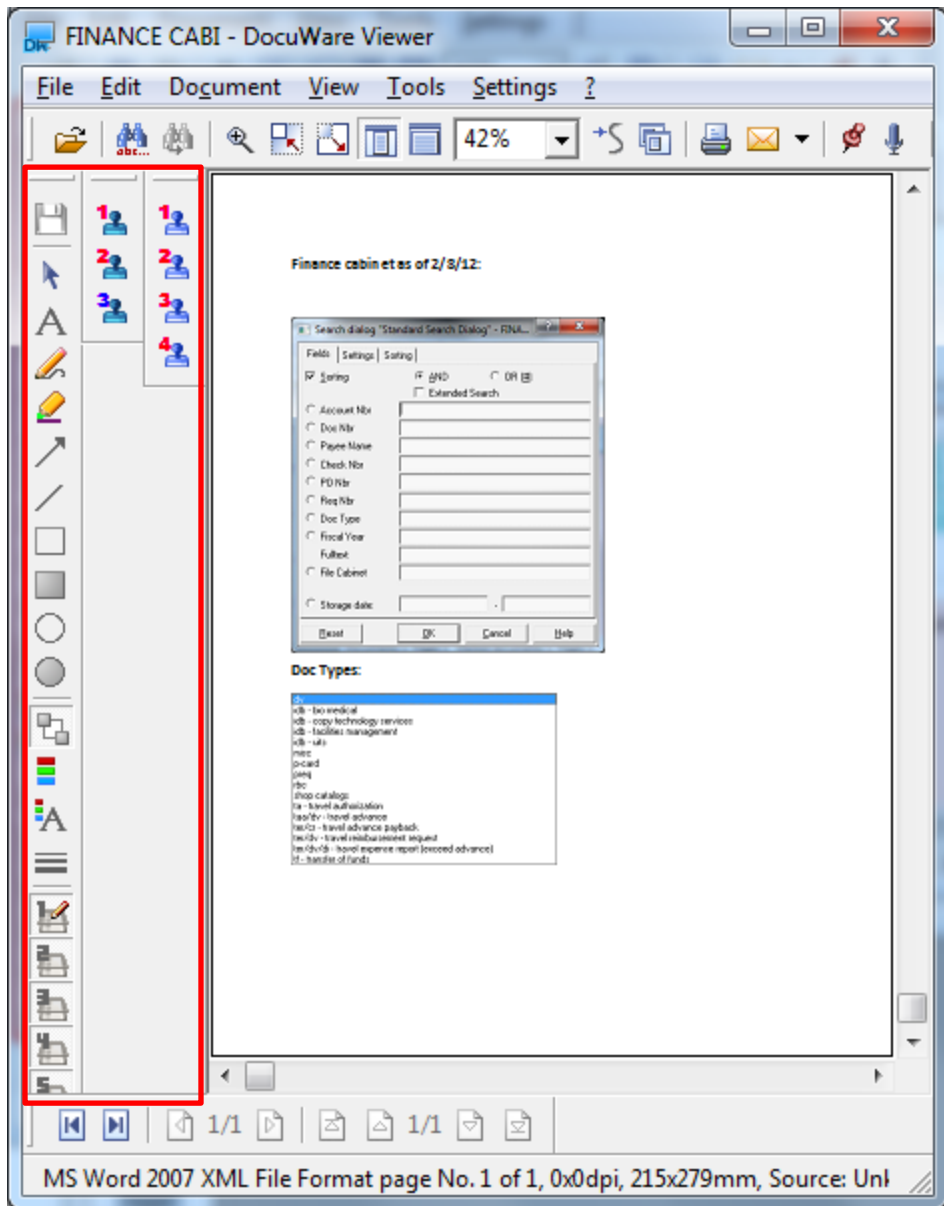
Documents that are in PDF, Grayscale or Color will require you to use the following to


change pages... 



- **Additional Tools in the DocuWare Viewer**

On the left side of the DocuWare Viewer you will find drawing tools, stamps, and overlay levels. Depending on your preference, you can move the drawing toolbar to top, bottom or left on the DocuWare Viewer.



- Stamps 

We use a variety of electronic stamps to indicate actions performed on a document such as **Faxed**, **Emailed**, **Approved**, etc. Placing stamps on documents is an important manual step that demonstrates to auditors our strong internal controls and compliance. Your office can decide on what stamps will be used to indicate actions on a document.

You are allowed up to 9 personal stamps that you can create. Personal stamps are only available to the individual who created them.

There are also 9 Public Stamps available, although these are created by the DocuWare Administrator (COM- IT Records Management). These stamps will consist of the most commonly used stamps across the organization such as Append, Fax, Copy, etc.

If you hover your cursor over a stamp, you will be able to see the name of the stamp. To place the stamp, click on it to bring up the stamp and place it in a desired location on the document. Once you save the document, the stamp will not be able to be moved on the overlay level that's active.

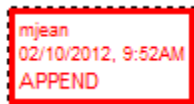
- Stamps can also be customized to change index fields (indices) when placed on a document to assist with workflow.
- Since a stamp is set on an annotation layer (overlay), the desired layer must first be activated (See **Activate/De-activate Level** below). After this, click on one of the stamp icons to invoke the stamp function.
  - Clicking on the stamp you want to add to a document will activate the placement of the stamp. Drag the stamp to the desired location and left-click to finalize the placement. The stamp is then set or, depending on the stamp setting, you will be asked for your password or prompted to enter information in the stamp.
- All pages appended to an existing DocuWare document should have each page stamped with the **APPEND** stamp in any open space at the top of the page.
  - COM-IT Records Management stores the appended hard copy portion of the document separate from the source document.
  - By being able to refer to the **Append** stamp we are able to know who appended the document and the date and time the action was performed. This information allows us to locate the hard copy if required.
  - Other common stamps you'll encounter are the **FAX** (mentioned above) and **EMAIL** stamps used to indicate how documents have been received in the College of Medicine.
    - ✓ **Creating Private Stamps** – stamps created by and available to individual users who created the stamp.
    - ✓ **Public Stamp Definitions** – stamps created by an Administrator and assigned to a group of users.

- **Store Annotation** 

When clicked, this option will store any annotations you make to a document. If you close the viewer after adding annotations and do not click on the disc icon, you will be prompted asking you if you want to save the changes you made to the document. You can click the save disc icon or save your changes when prompted.

- **Select Drawing Object** 

The cursor icon allows you to select any annotations or stamps you've added to a document and move them to a more desirable location on the document. For example, when you click on a stamp that you want to move, a checkered border will appear around the stamp/annotation to signal it's ready to be moved. You can then drag it to your desired location. Once you save the document, the stamp's location cannot be altered at a later time.



- **Write Text Overlay** 

This is the option you'll use to add a text overlay on the document. This is helpful for adding notes right on top of the image of the document that you want to stand out and others to see upon opening the document.

Invoice was paid on 2/1/12.-mcj

- **Draw Freehand Line** 

This tool allows you to draw freehand lines on the document. You probably won't use this tool much unless you identify a use for it.



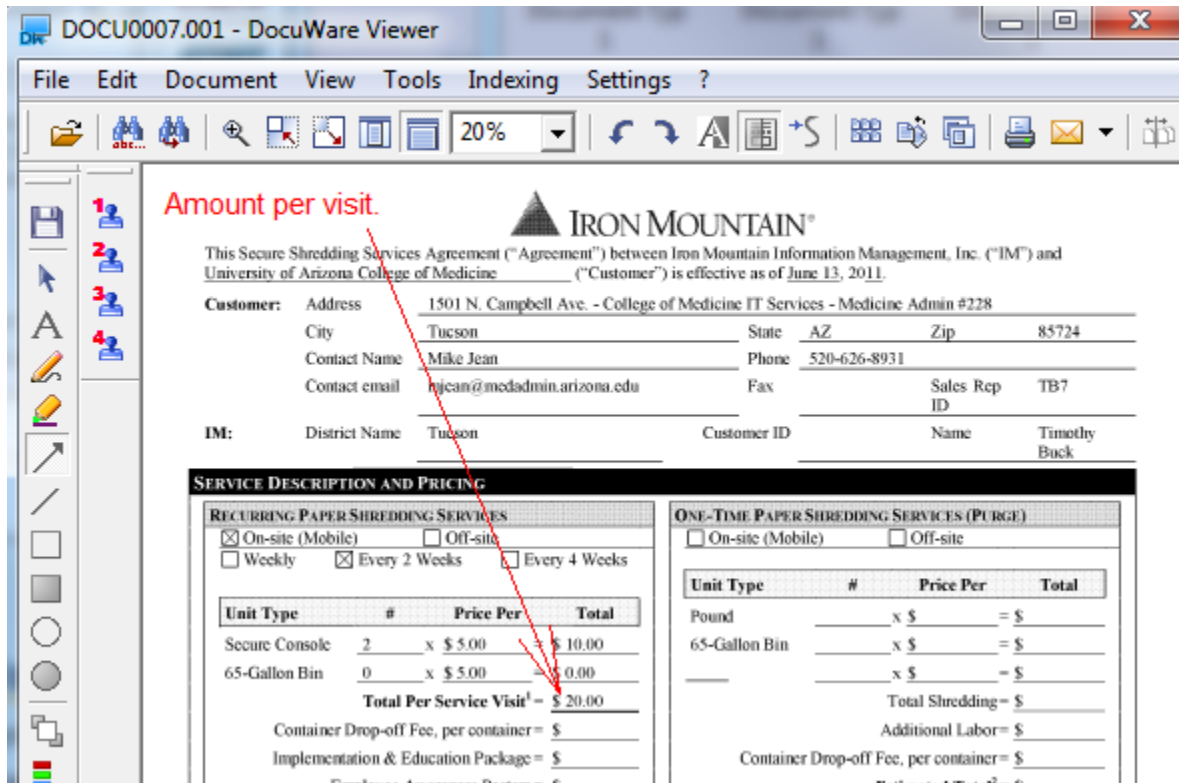
- **Highlight with a marker** 

You can use this tool to highlight text on a document. I recommend using the **Transparent / Non-Transparent objects** tool instead due to its precision (see below). Using the marker is like drawing freehand.

Finance cabinet as of 2/8/12:

- Draw Arrows 

This tool can be used to point out something you want to draw attention to such as an amount.



DOCU0007.001 - DocuWare Viewer

File Edit Document View Tools Indexing Settings ?

Amount per visit.

**IRON MOUNTAIN®**

This Secure Shredding Services Agreement ("Agreement") between Iron Mountain Information Management, Inc. ("IM") and University of Arizona College of Medicine ("Customer") is effective as of June 13, 2011.

**Customer:** Address 1501 N. Campbell Ave. - College of Medicine IT Services - Medicine Admin #228  
City Tucson State AZ Zip 85724  
Contact Name Mike Jean Phone 520-626-8931  
Contact email mjjean@medadmin.arizona.edu Fax Sales Rep ID TB7

**IM:** District Name Tucson Customer ID Name Timothy Buck

**SERVICE DESCRIPTION AND PRICING**

**RECURRING PAPER SHREDDING SERVICES**

On-site (Mobile)  Off-site  
 Weekly  Every 2 Weeks  Every 4 Weeks

Unit Type	#	Price Per	Total
Secure Console	2	x \$ 5.00	\$ 10.00
65-Gallon Bin	0	x \$ 5.00	\$ 0.00
<b>Total Per Service Visit<sup>1</sup></b>			<b>\$ 20.00</b>
Container Drop-off Fee, per container =			\$
Implementation & Education Package =			\$
Employee Awareness Program =			\$

**ONE-TIME PAPER SHREDDING SERVICES (PURGE)**

On-site (Mobile)  Off-site

Unit Type	#	Price Per	Total
Pound		x \$	= \$
65-Gallon Bin		x \$	= \$
		x \$	= \$
Total Shredding =			\$
Additional Labor =			\$
Container Drop-off Fee, per container =			\$
Estimated Total <sup>2</sup> =			\$

- Draw Line 

This tool probably won't be used.

- Draw Rectangle 

This tool can be used to draw a border around text or an object on a document.

Address 1501 N. Campbell Ave. - College of Medicine IT Services - Medicine Admin #228

- **Draw Filled Rectangle** 

This tool can be used to cover text on a document with a rectangle box with the color of your choice, although it is only an overlay and the overlay level may be turned off if desired. We'll cover overlay levels below.

- **Draw Circle Line and Draw Filled Circle** 

These tools have the same functionality as the rectangles described above, but use circles instead.

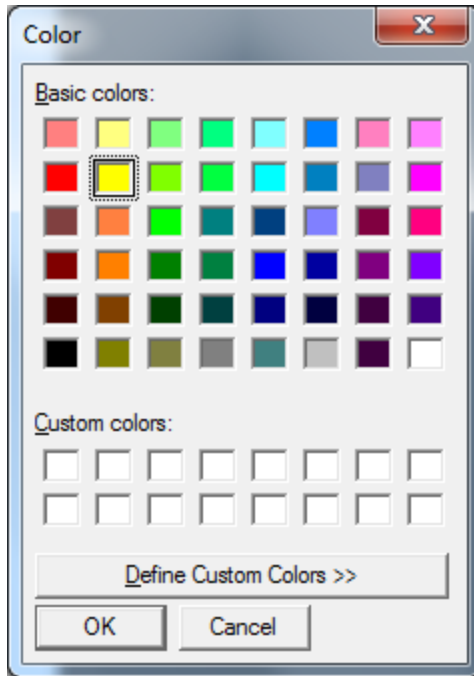
- **Transparent / Non-Transparent objects** 

This tool is used for highlighting text or objects. You can use any color in the **Select Color** pallet that we'll cover below.

**\$ 10.00**

- **Select Color** 

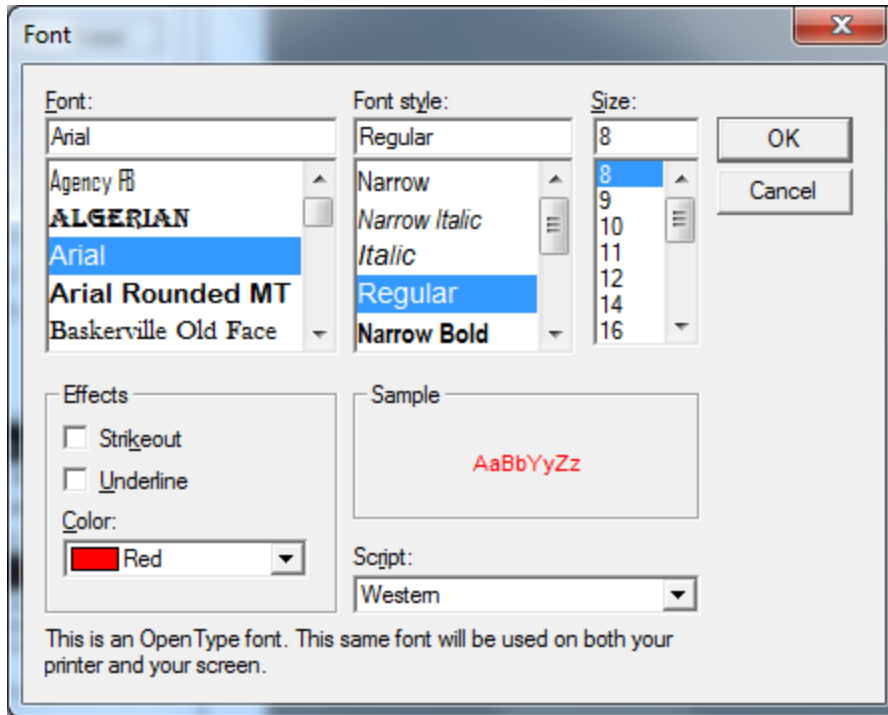
This is where you can select the color of the lines, shapes, and highlights.



- **Select Font** 

This is where you can select the font, font size and color of your font for text annotations.





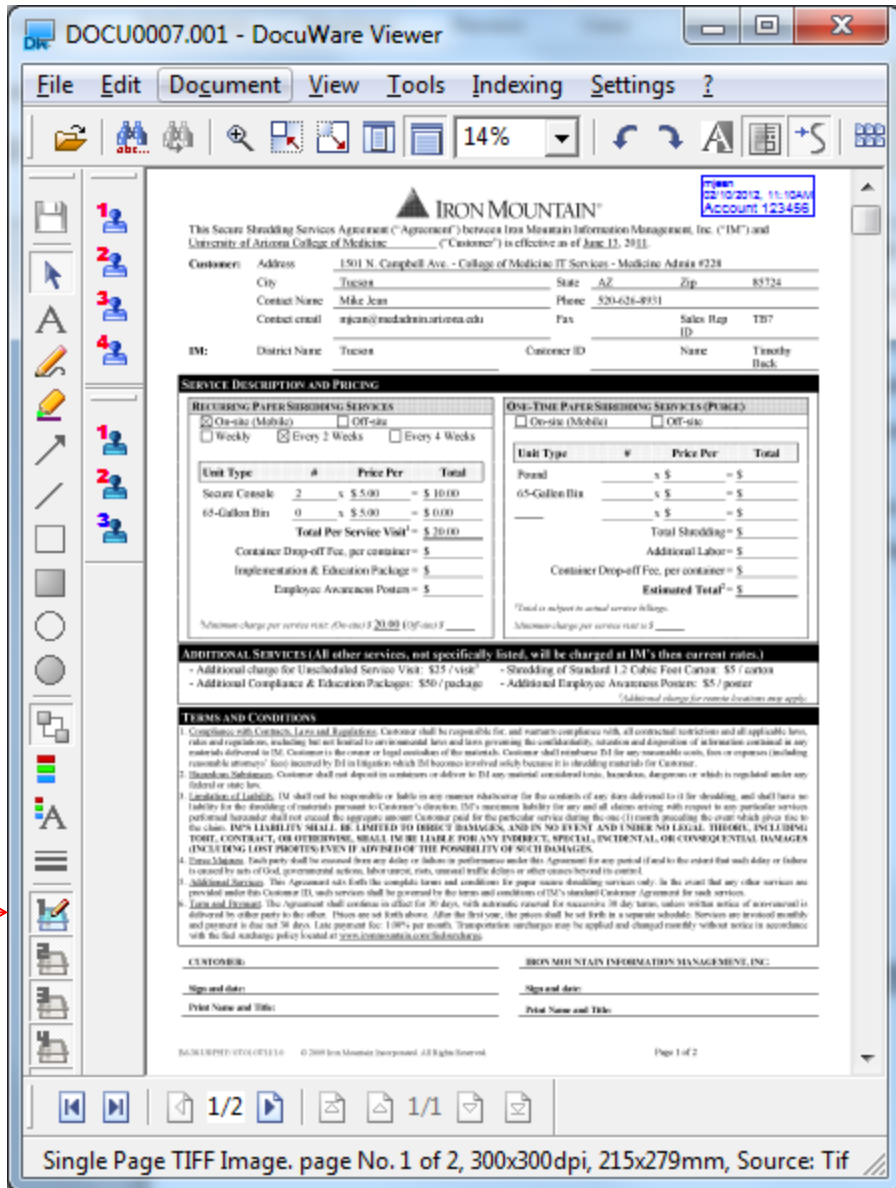
- **Select Line Size** 

This tool is used to select the size of the line you may desire if you use the tool, **Draw Line** covered above.

- **Activate/De-activate Level (Overlay Levels)** 

There are **5 levels of overlay** available on any DocuWare image file. The active level is indicated by an icon of a pencil. Generally speaking, we typically only use Overlay Level 1 for stamps and annotations. You may find that using all 5 levels is desired for a particular office or business process. For example, a *Reviewer* might use Level 1 for their notes and an *Approver* may always use Level 2 for their notes.

If for some reason you feel a document that you are viewing should have annotations or stamps, but you don't see them, ensure that your overlay levels are activated (see below).



## Shortcut keys

- Shortcuts can be found in the menu drop down lists next to function you are looking to learn shortcuts for.

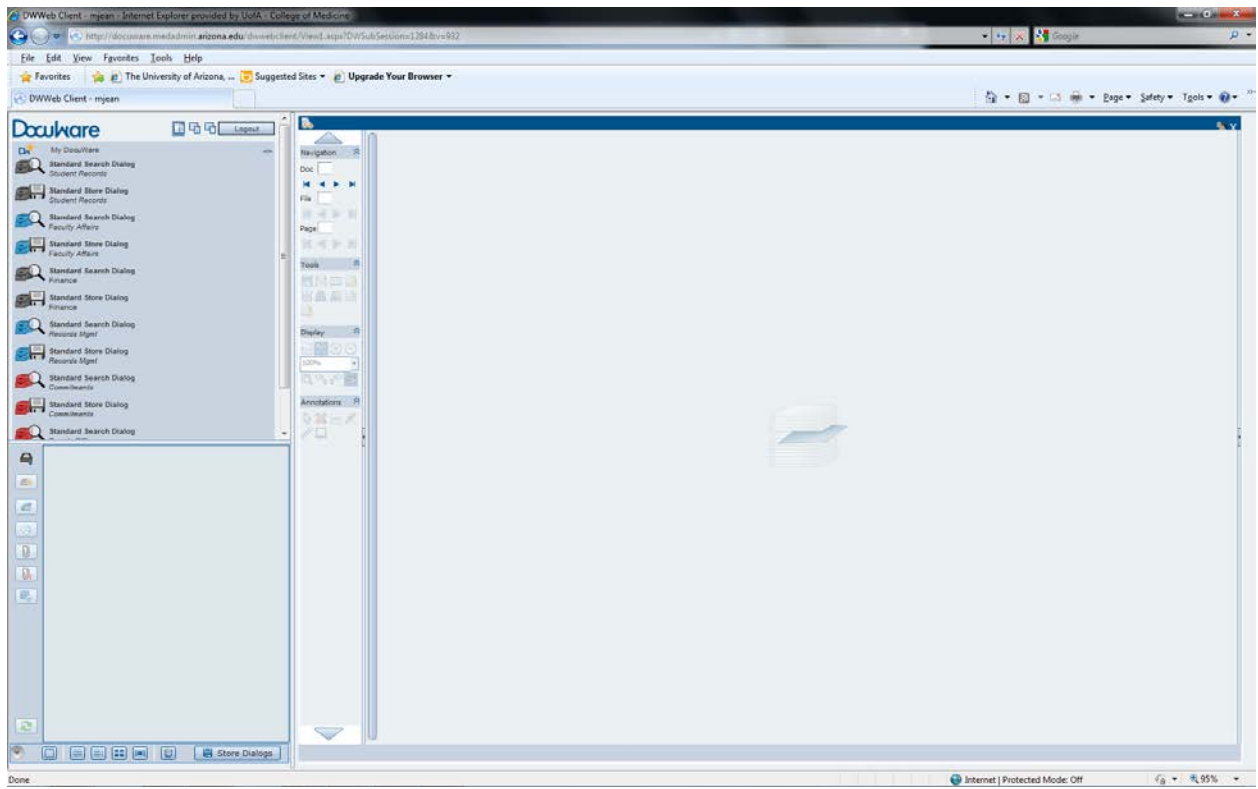
Some other helpful shortcuts are....

- **Lighten and darken** the text on a DocuWare black and white tiff image. Using your number keys 1-8 you can temporarily adjust the setting on an image with **1** being the lightest and **8** being the darkest. This option is not available for documents stored in their native Microsoft office format or documents stored in color or grayscale format.
- Typing **X** in the search dialog field, 'Store Date', for any DocuWare file cabinet will auto-populate that field with today's date. Pressing the TAB KEY will carry over the current

date to create a search range to limit your current search to the specified date range. Use the + or – key to increase or decrease the search range.

## **DocuWare Web Client**

- <https://docuware.medadmin.arizona.edu/dwwebclient>
- The Web Client has all the functionality of the Windows Client. It can be accessed anytime within the Medadmin domain (at work). It can also be used outside of work to allow you to access your records. This is nice feature if you plan to work from home or if you're on a business trip. If you plan to use the Web Client outside of work, you'll need to make sure your device is set up for VPN access to the College of Medicine domain (please visit the Help Desk for assistance). You can access the Web Client by entering your user name and password that you use to log onto your computer every morning.
- The most useful feature of the Web Client is having the ability to send a TIFF format documents as an email attachment in PDF format. This means that any document that may have been scanned or imported into DocuWare as a TIFF documents will instantly covert to PDF format for easy view ability by your email recipient. Any document stored in its native format within a DocuWare file cabinet, such as Microsoft Office documents, will automatically import into your email attachment in its native format when using the Windows Client.



Last revision: 04/25/13 mcj