Operations Manual

Desk Procedure – Extracting DocuWare Results List to Excel Spreadsheet

Process:	**DocuWare Results List to Excel Spreadsheet**
Date:	**9/20/12**
Process Owner:	**COM-IT Records Management**
Purpose:	**To provide the steps required to export a DocuWare Results List to an Excel Spreadsheet.**
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Definitions and Responsibilities

Tools and Resources:

DocuWare

Microsoft Excel

Overview:

It's possible to search for a specific set of information in DocuWare and extract the Results List, which shows all index data of the specified documents, to an Excel file. Exporting this information directly into an Excel spreadsheet will allow you to share this information with others or keep in your electronic files for reference.

Process

1. Double-click on your file cabinet to open the Search dialog.
2. Enter search criteria and click

OK

3. The Results List will display all matching documents

4. Click on the 'New Retrieval' icon shown above
   a. The search dialog will appear with your original search criteria
   b. Click on the 'Settings' tab and check the box, 'Result to file:'
   c. Click the radio button, 'dBase' and choose your file destination by clicking on the 'browse' option to selection your file's destination.
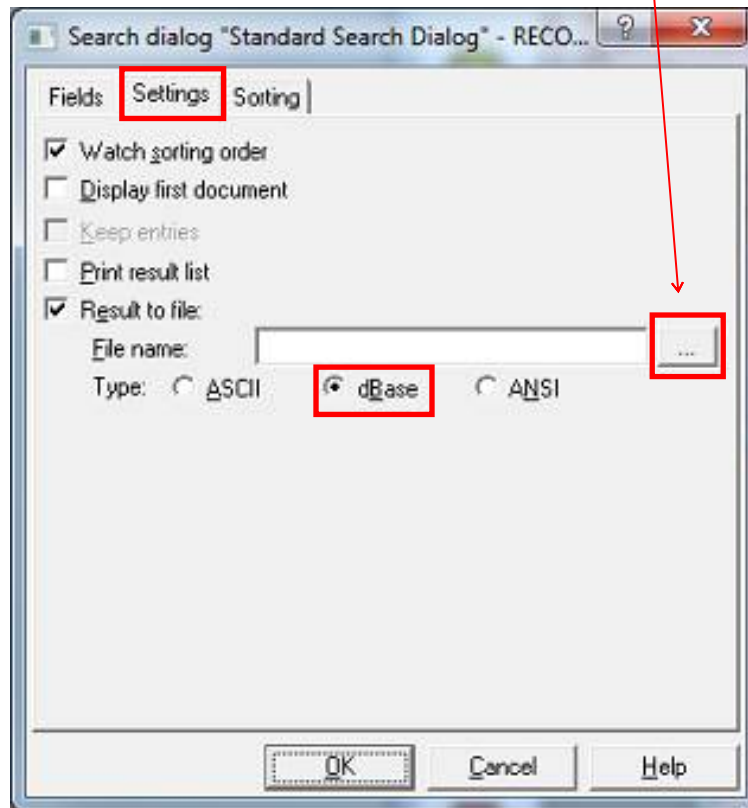
   i. Name your file and click 'Open'. You'll see that your file destination is now populated in the 'File name:'
   ii. Click 'OK'
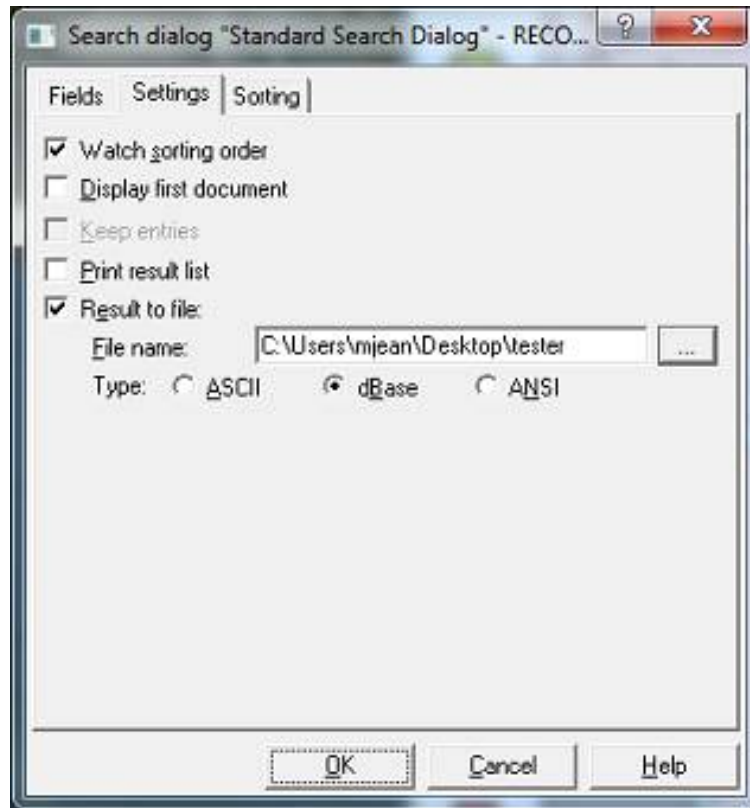
5. Locate the file where you stored the file to and right-click on the file and choose 'Open'. A new window will appear giving you a list of programs to open the file with.
   a. Choose Microsoft Excel and click 'OK'
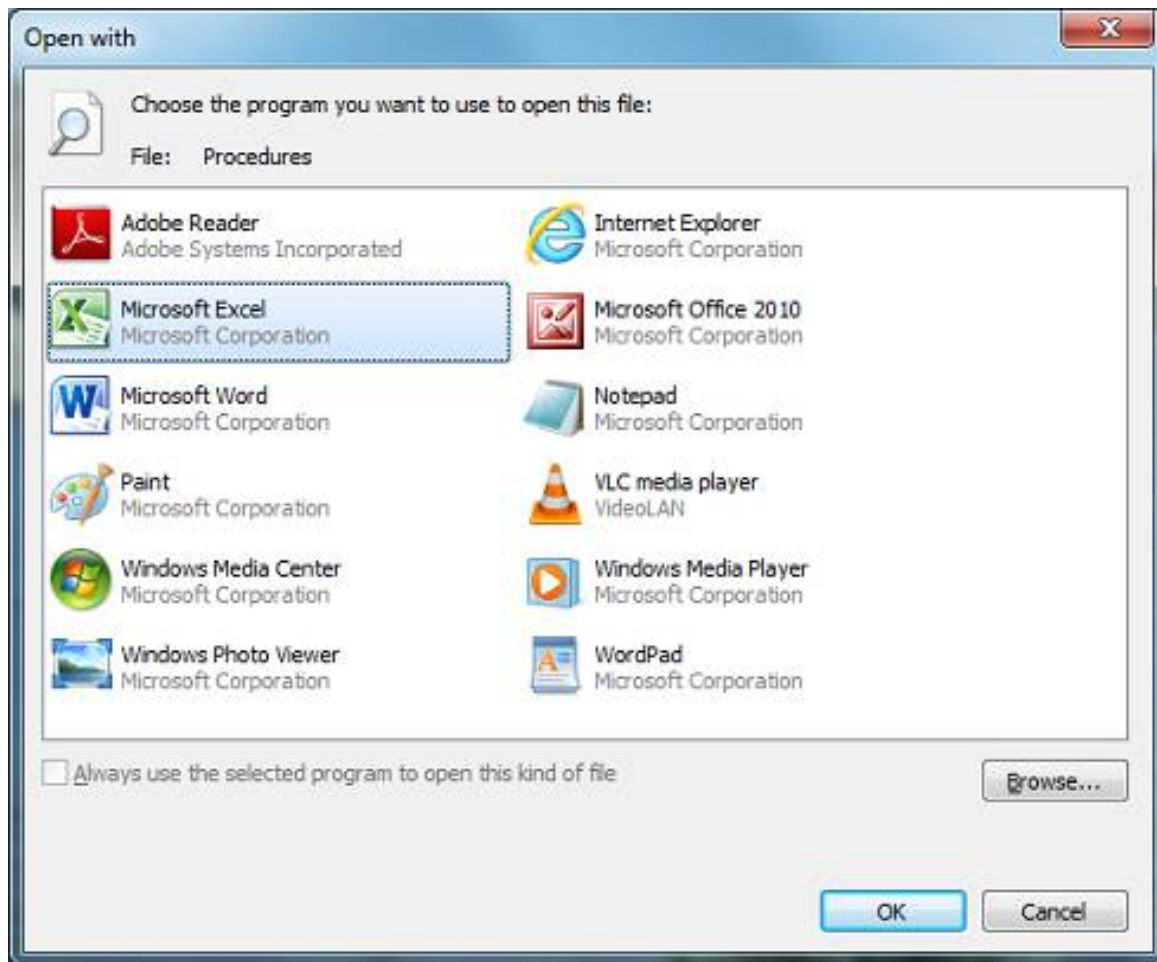
b. You will probably receive an Excel warning as shown below. Disregard and click 'Yes'.

c. There will be some column information specific to DocuWare shown in your file such as "DOCID, STORETIME and PAGECOUNT". You may delete these columns so that you're only displaying desired information.

d. You Results List will now be an Excel file that you can save or share with your colleagues.

DOCID	STOREDATE	STORETIME	PAGECOUNT	DISKN	OFFSET	FLAGS	DOCUMENT_N	COM_UNIT
136	8/29/2012	14.16	1	1	0	2	CABINET PROFILE FILTERS	RM
133	8/17/2012	9.52	1	1	0	2	FILTER ACCESS RIGHTS DEMO INSTRUCTIONS	RM
132	8/16/2012	9.40	1	1	0	2	FILTERED ACCESS RIGHTS DOCUMENTATION FROM DW	RM
124	6/19/2012	15.59	1	1	0	2	ADVANCED ACTIVE IMPORT SETTINGS	RM
120	6/12/2012	15.23	1	1	0	2	USING DW WEB CLIENT TO EMAIL PDF ATTACHMENTS	RM
114	4/4/2012	15.28	1	1	0	2	SCANNING WITH CANON MFD	FINANCE
113	4/4/2012	15.28	1	1	0	2	INDEXING FINANCE DOCUMENTS	FINANCE
112	4/4/2012	14.33	1	1	0	2	MFD AND DOCUWARE BASKET ISSUE	RM
107	3/16/2012	16.06	1	1	0	2	ADDING NEW FILE CABINETS	RM
105	3/12/2012	10.20	1	1	0	2	DW EMAIL FILE FORMAT CORRECTION	RM
104	1/9/2012	10.01	1	1	0	2	APPENDS AND NATIVE FORMAT STORAGE	RM
103	1/7/2012	16.23	1	1	0	2	MFD TEMPLATE CREATION	RM
98	2/23/2012	15.30	1	1	0	2	SCANNING WITH MFD	RM
94	2/17/2012	12.20	1	1	0	2	CALCULATING STORAGE SPACE	RM
93	2/17/2012	12.19	1	1	0	2	EXTRACTING RESULTS LIST REPORTS	RM
76	2/1/2012	12.57	1	1	0	2	BARCODE STUDIO DRAFT	RM
55	1/24/2012	7.55	1	1	0	2	DOCUWARE INSTALLATION ON WINDOWS CLIENT	RM
27	10/18/2011	9.44	1	1	0	2	TIFFING DOCUMENTS INTO DOCUWARE	RM
15	10/18/2011	9.15	1	1	0	2	COM DW WEB CLIENT ADDRESS	RM