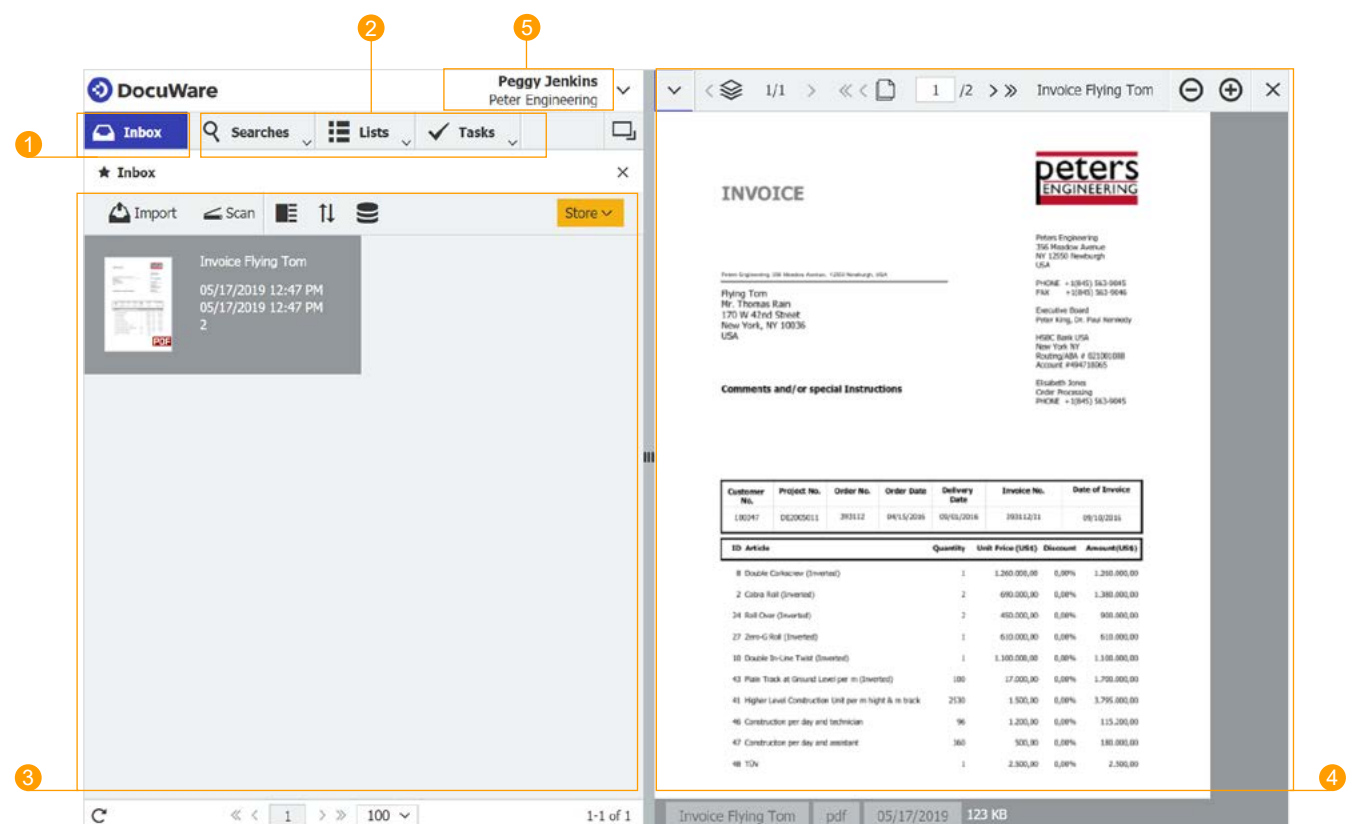


Your First Steps with DocuWare

Welcome to the DocuWare Client! On this central platform you manage all your business documents. Depending on whether you are working with a DocuWare Trial version or with an existing system, some settings may differ, but the functions are always the same. In both cases, use this tutorial as a reference.

DocuWare Client At a Glance



The screenshot shows the DocuWare Client interface. On the left, the 'Inbox' is visible with a document titled 'Invoice Flying Tom' dated 05/17/2019. The main area displays a preview of the invoice document. The interface includes a top navigation bar with 'Inbox', 'Searches', 'Lists', and 'Tasks' menus. A user profile for 'Peggy Jenkins' is shown in the top right. The document preview shows the 'INVOICE' header, company logo for 'peters ENGINEERING', and a table of items.

Customer No.	Project No.	Order No.	Order Date	Delivery Date	Invoice No.	Date of Invoice
10047	06005611	393112	04/15/2016	05/03/2016	393112/1	05/10/2016

ID Article	Quantity	Unit Price (USD)	Discount	Amount (USD)
8 Double Concrete (Inverted)	1	1,260,000.00	0.00%	1,260,000.00
2 Cobra Rail (Inverted)	2	690,000.00	0.00%	1,380,000.00
24 Roll Over (Inverted)	2	450,000.00	0.00%	900,000.00
27 Zero-G-Rail (Inverted)	1	610,000.00	0.00%	610,000.00
10 Double In-Line Twist (Inverted)	1	1,100,000.00	0.00%	1,100,000.00
43 Plain Track at Ground Level per m (Inverted)	100	17,000.00	0.00%	1,700,000.00
41 Higher Level Construction Unit per m height & in track	2530	1,500.00	0.00%	3,795,000.00
46 Construction per day and technician	96	1,200.00	0.00%	115,200.00
47 Construction per day and assistant	360	500.00	0.00%	180,000.00
48 10v	1	2,300.00	0.00%	2,300.00

1 **Your Inbox.** Capture documents, prepare them in your individual document tray for archiving and store them to the file cabinet.

2 **Access the file cabinet.** Find your archived documents quickly, collaborate and list your daily tasks.

3 The **work area** looks different depending on what you are about to do. First time you open DocuWare, you see like now your Inbox. When clicking on the magnifier icon, the search dialog will open here.

4 **View documents.** Browse through your document, annotate and share it.

5 **Explore further.** Adjust your personal settings via the main menu and fit DocuWare to your needs. Install DocuWare Desktop Apps for scanning and editing documents.



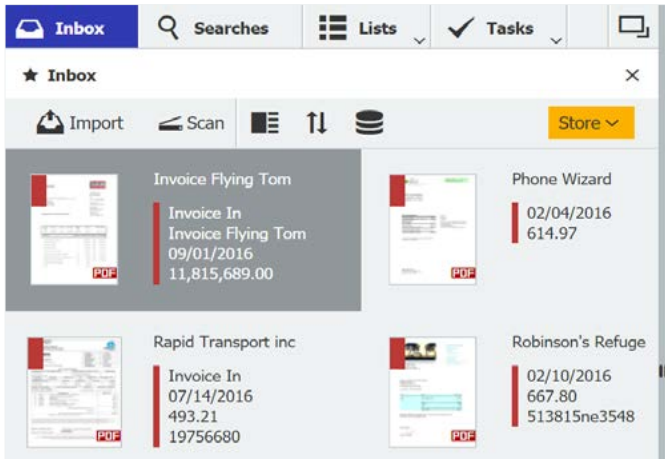
Click on the tiny right arrow in the navigation bar to scroll through the pages of the document.

Import Documents


You are here: Inbox 


What you do here:

Drag & Drop your own documents into your Inbox. Or click the Import-button to choose documents from your file system. Sort, clip and index documents and pass them to the file cabinet. Documents in your Inbox are not yet accessible for other users.



Tips:

- Right-click a document to call up the **context menu** with lots of functions.
- Try **Intelligent Indexing**: This service identifies important document information automatically and learns from your entries during archiving. Next time you store a similar document, all index proposals will be more accurate. Check the label of the thumbnail:  Green means the automatic indexing is good and no manual enhancement is needed.
- Mark a document and hit **"Store"** to open the store dialog. Here you can modify the index proposals.



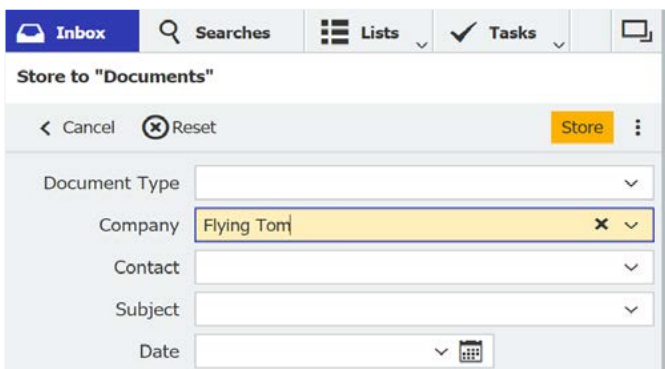
Archiving documents always means indexing as well. Index entries are like order criteria. Based on them, documents can be found in the file cabinet or processed automatically.

Store Documents

You are here: Inbox  with store dialog opened

What you do here:


To store a document from the Inbox to the file cabinet, assign index entries to the document. Once archived, the document is - depending on the rights, roles and profiles - accessible for other users.



Tips:

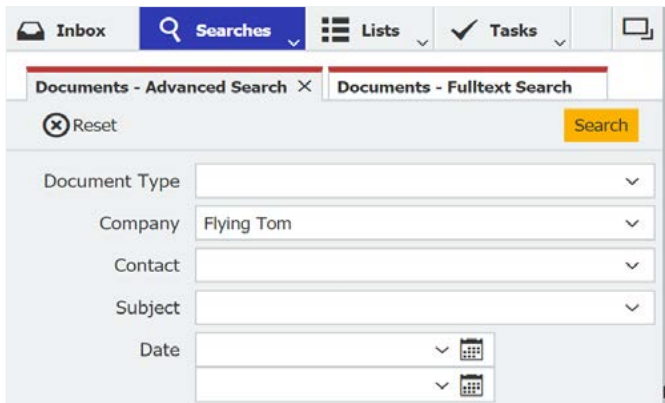
- Most of the index entries are proposed by Intelligent Indexing (see above). To improve indexing, select the correct index entry from the **select list**, clicking on the arrow.
- Use the tool **One Click Indexing** to easily accomplish indexing (see page 4).
- In a date field, **type x** to enter the current date.

Find Documents

You are here: search dialog 

What you do here:

Define a search to get precise results. In the trial there are two search dialogs preinstalled, one for a quick full-text search and one for an extended search used to search by DocType, Company, Date and other index fields, combined with full-text search.



Tips:

- Search like Google: **Full-text** finds the search term in the document content.
- Hit „**Search**“ to get the result list.
- Use **asterisk search**: Type *Flying** to search for all companies beginning with “Flying”.



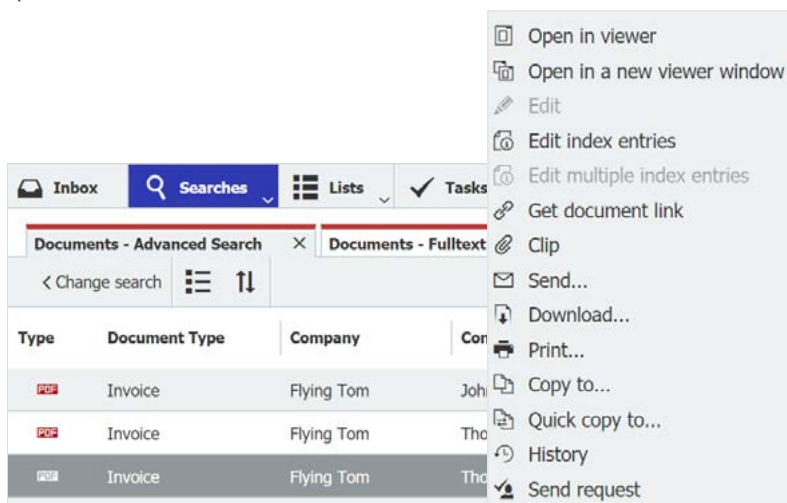
Searches always refer to documents in file cabinets. You cannot search for documents in the Inbox.

Review search results

You are here: result list 

What you do here:

View, share or process the documents of your result list. You can access the documents in a file cabinet at anytime – given that you have the permission. But don't worry, in this trial you are provided with a fully qualified user role.



Tips:

- Double-click on a document in the list to **see it in the Viewer**.
- Right-click on a document to **call up the context menu** with lots of features.

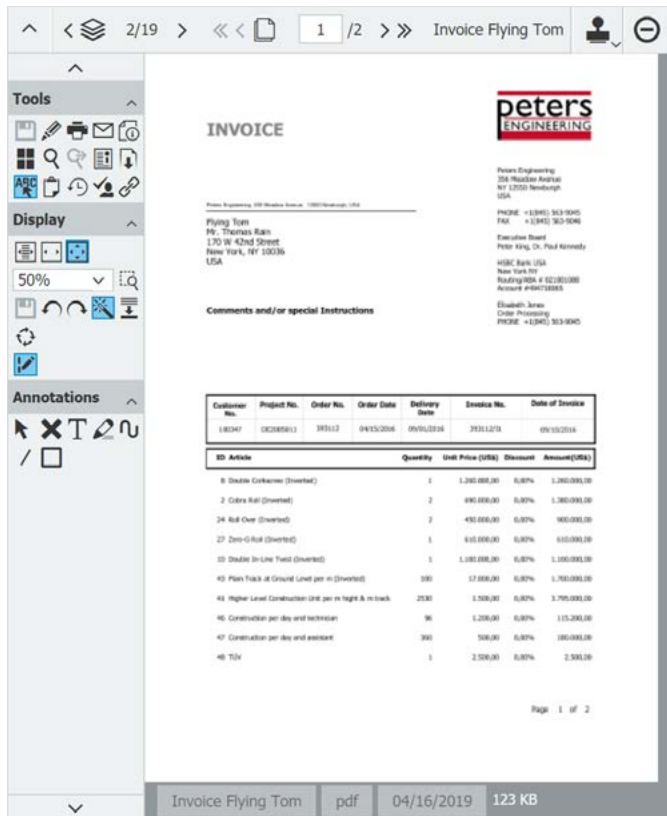


The editing pencil opens the document in the original program. It allows changing the content of documents directly in the file cabinet. To edit documents, you need to install the Edit&Send App first. This is why the Edit-tool in the context menu might be greyed out when you start with DocuWare. Go to the main menu and click “Install Desktop Apps”.

You are here: DocuWare Viewer

What you do here:

Browse the document and process it with the tools below. Note: You will have fewer tools at your fingertips, when you view a document from your Inbox. Processing tools like stamps are for archived documents only.



Tips:



Browse the document: view the pages of your current document.



View another document from the result list or document tray.



Place a **stamp** to apply information to a document. A digital stamp can also change the index entries of a document and trigger a workflow. In the trial some stamps are predefined to explore.



Open the **toolbar** on the left side of the viewer.



Try **One Click Indexing**: open a store dialog, set the cursor in an store field and activate this tool (see page 2 "Store"). Just mark a snippet in the document - it will directly be inserted in the store field.



Enter **comments** and other **annotations**.



Stamps and annotations are applied on a layer, the document itself remains untouched. If you want to change the content, use the pencil tool for editing.

Explore further

We hope you enjoyed the experience of DocuWare's basic features. Are you ready to take the next step?

- Go to the main menu and **install Desktop Apps** for scanning paper documents, editing the content of documents and much more.
- Show your DocuWare to colleagues. **Create more users** in the DocuWare Configuration and let them get a glimpse.
- **Explore the full range of DocuWare:** <https://start.docuware.com/features-and-capabilities>.
- **Stay up to date** with the with the monthly newsletter just for our users: <https://info.docuware.com/newsletter-sign-up>.