

# **DocuWare User's Guide**

## **APDocs/NonAPDocs Agency Reports Security Reports**

## DocuWare Icon/Login

### Introduction

DocuWare will work with Internet Explorer, Microsoft Edge and Chrome browsers. Save a shortcut to your desktop or *Favorite* to the following site:

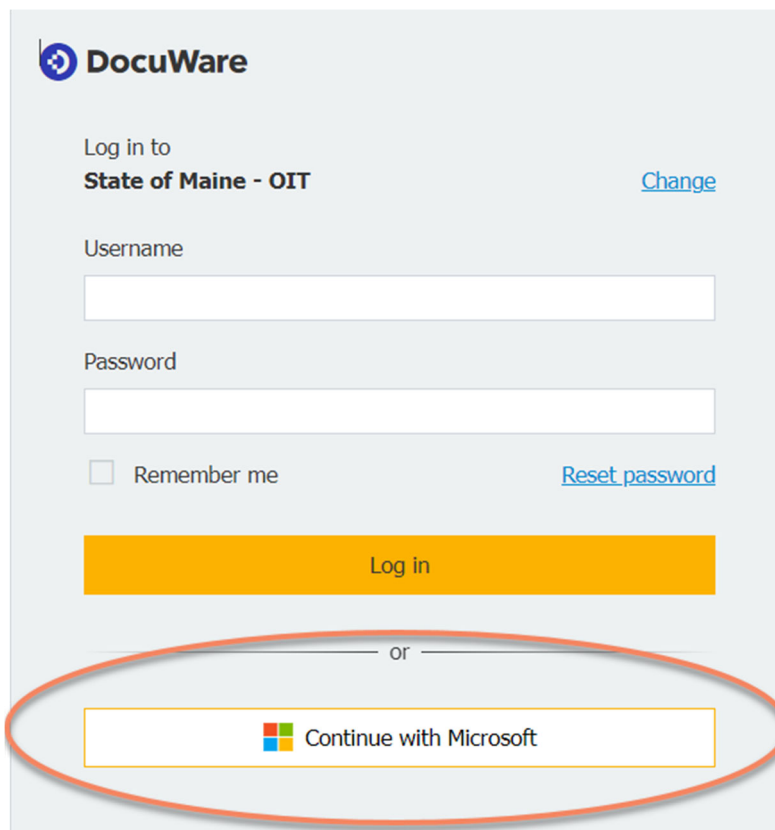
<https://docuware.state.me.us/docuware>. Do not do a bookmark to any other URL besides what was just given or it could cause issues in your browser.

If you are from Legislative or Judicial branch and do not have a SOM Active Directory account, you will log into this URL, instead of using the Continue with Microsoft option.

<https://docuware.maine.gov/docuware> - You will have a userID and password provided to you.

### Step One: Launch Docuware

Launch the website and select Continue with Microsoft. This will log you into DocuWare using your AD account credentials.

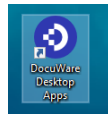


The screenshot shows the DocuWare login interface. At the top left is the DocuWare logo. Below it, the text reads "Log in to State of Maine - OIT" with a "Change" link to the right. There are two input fields: "Username" and "Password". Below the "Password" field is a "Remember me" checkbox and a "Reset password" link. A yellow "Log in" button is centered below the input fields. Below the "Log in" button is the text "or" and a button labeled "Continue with Microsoft" which is circled in red.

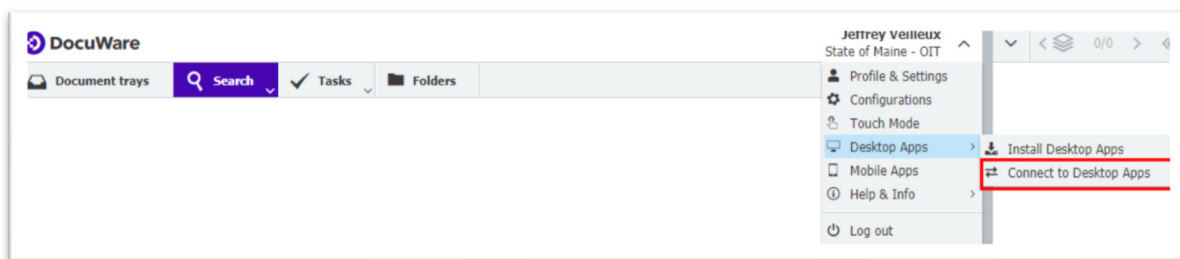
🎵 Using the Continue with Microsoft option will use your Active Directory account, which is the account you sign in with on your computer.

## Connect to Desktop Application if You are Using a Stand-Alone Scanner (not the MFP copier) and the SmartConnect Tool.

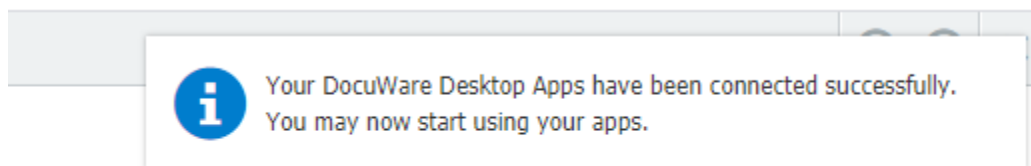
A **DocuWare Desktop App** icon should have been pushed out to your computer by the software group. If you scan, import, or print documents from DocuWare, you will need to be connected to the application. SmartConnect replaces ImageIT that was used in Fortis to automatically pull up documents.



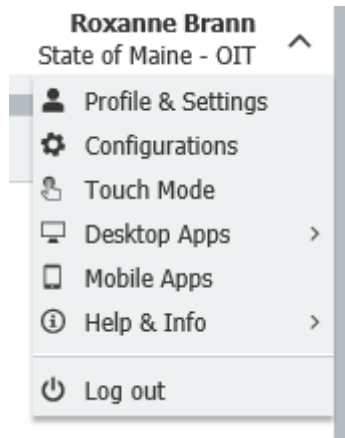
Locate the drop-down arrow next to your name (top center of the DocuWare window) in the DocuWare website application, not the Desktop application.



Select **Desktop Apps>Connect to Desktop Apps**. You will receive a pop-up confirmation within DocuWare.



## Setup Default Tools (Standard) – **THIS IS COMPLETELY OPTIONAL**



In Profile & Settings, select the *Viewer* tab. You have 3 different view options in DocuWare. The current *Standard* delivered will use the **Always show DocuWare Viewer in same window**. You can choose to **Open DocuWare Viewer in a new window** or you can choose to **Open DocuWare Viewer with index dialog in a new window**.

**Profile & Settings**

Profile **General** Security Document trays Searches Folders **Viewer**

**Viewer**

Always show DocuWare Viewer in same window

Open DocuWare Viewer in a new window

Open DocuWare Viewer with index dialog in new window

**Viewer Toolbars**

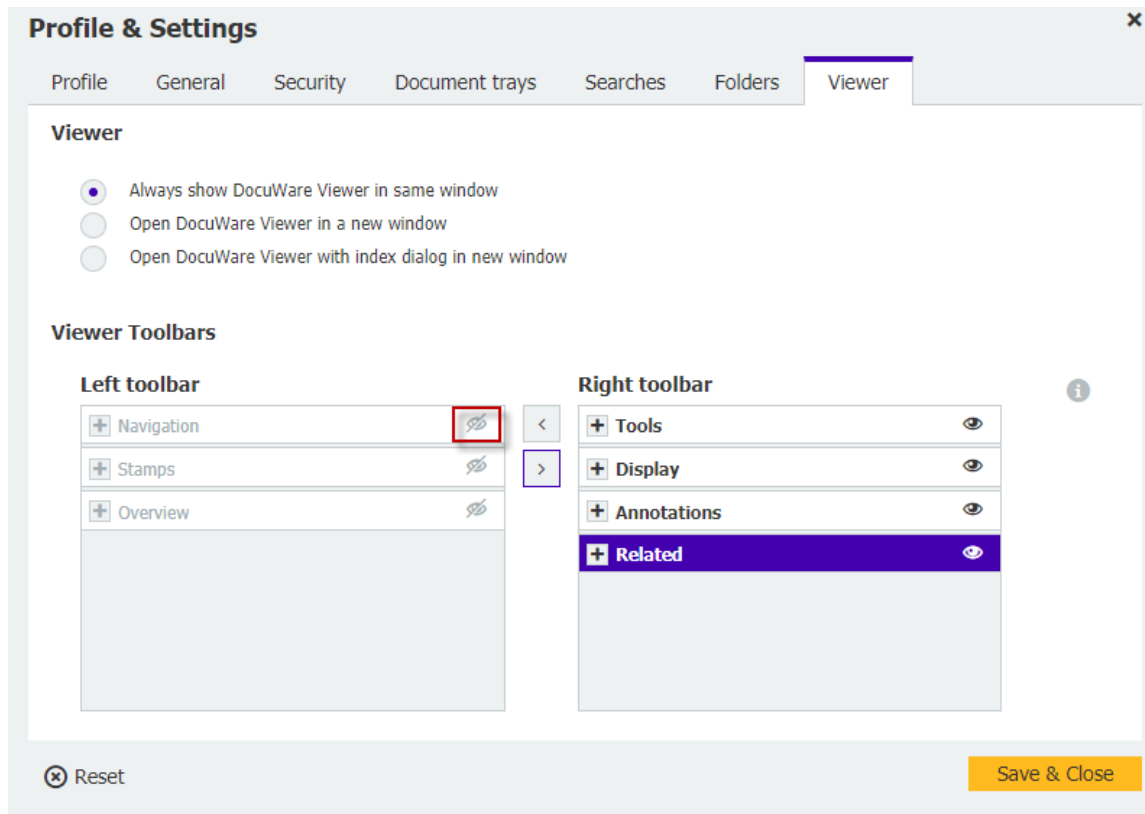
**Left toolbar**

- Navigation
- Tools
- Display
- Stamps
- Annotations
- Overview
- Related

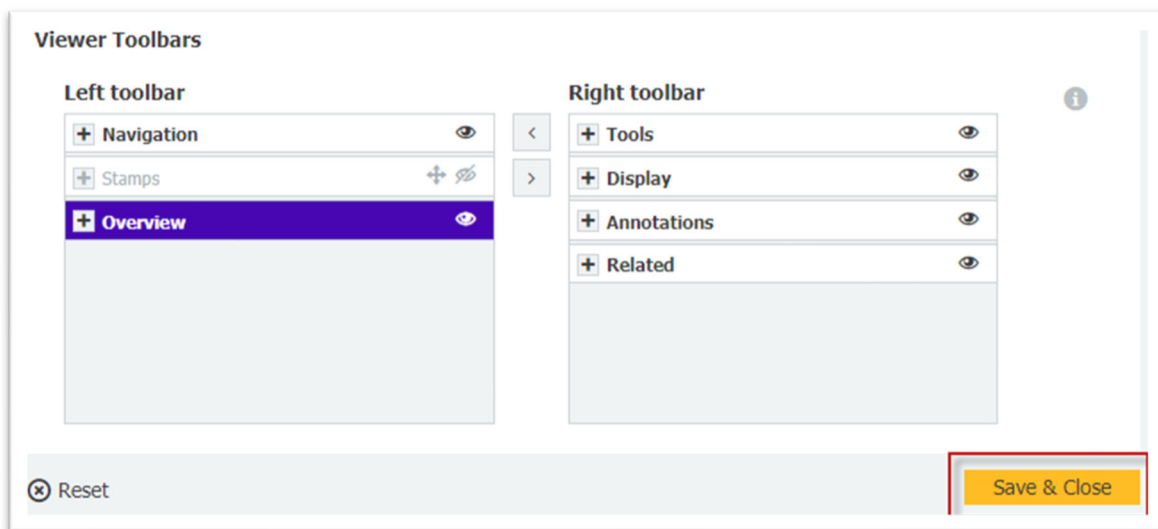
**Right toolbar**

Reset Save & Close

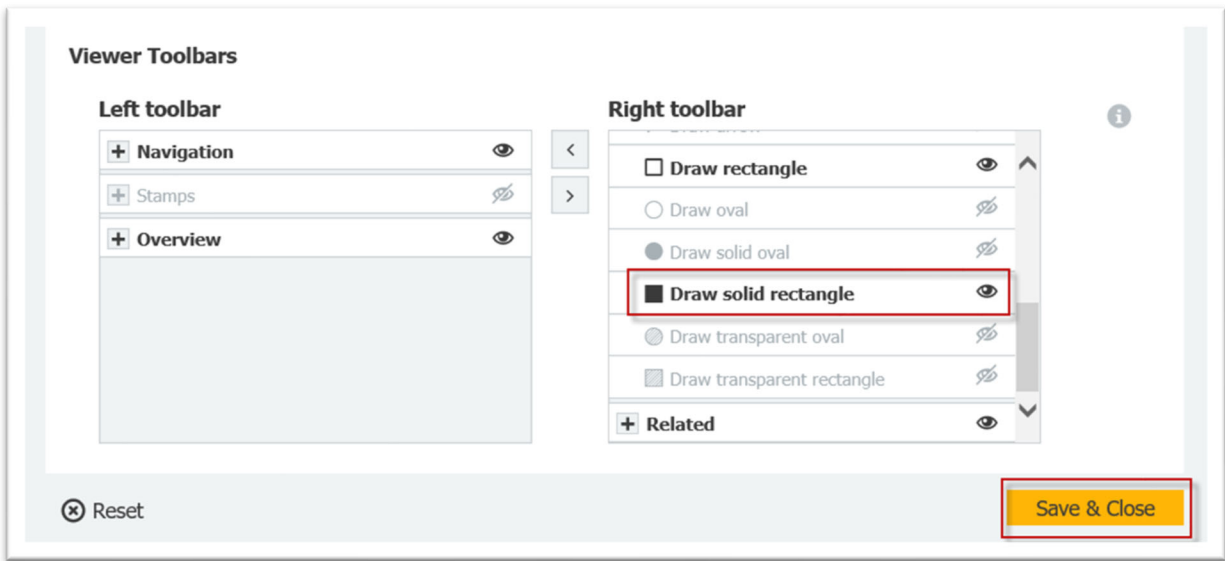
To setup *Standard* configuration of the *Viewer Toolbars*, move **Tools, Display, Annotations** and **Related** to the *Right toolbar* as seen below.



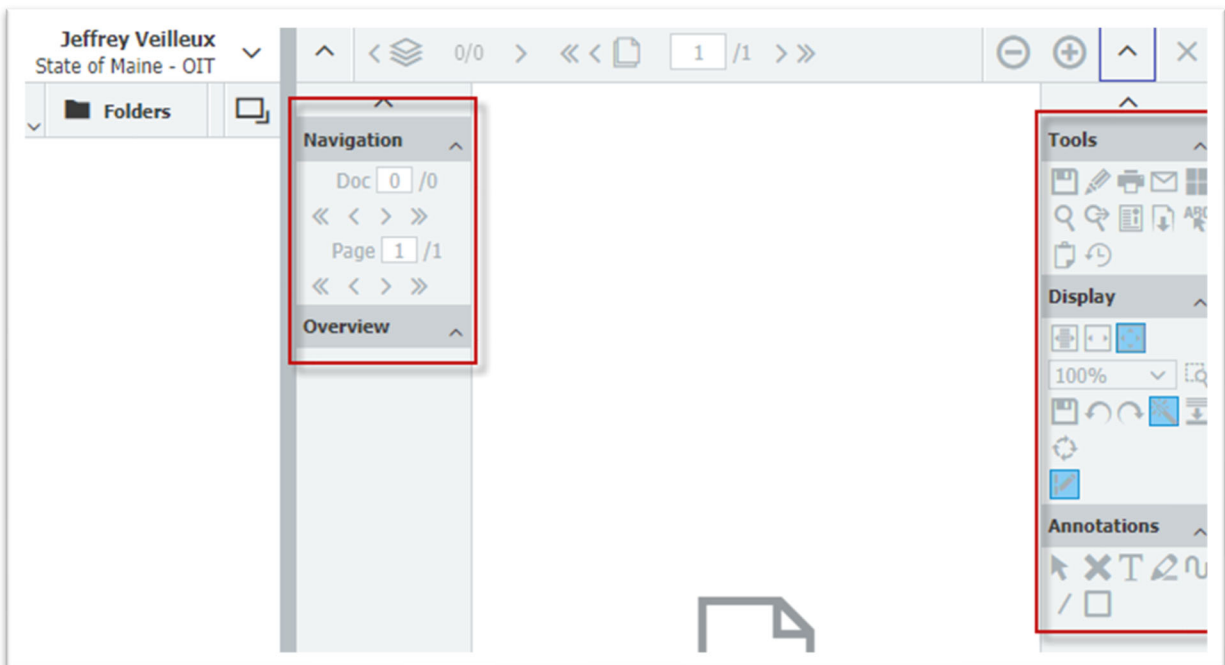
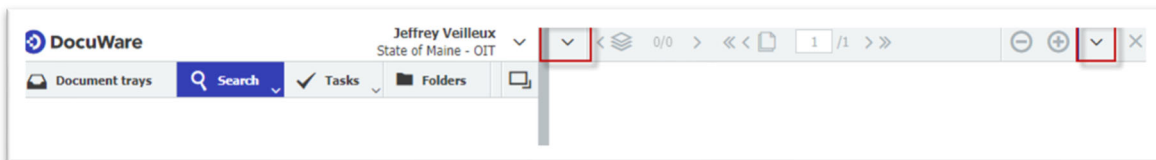
Click the grayed-out icon 'eye' icon next to *Navigation* to activate the tool bar. Do the same for *Overview*.

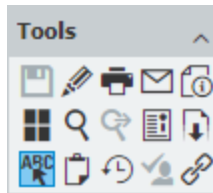


Select the "+" next to *Annotations* to expand the item and then select the *Draw solid rectangle* and then select **Save & Close**.



The new toolbars are now configured but will need to be made visible. Select the 'down arrows' near each top corner of the right side of the DocuWare window exposing tools.

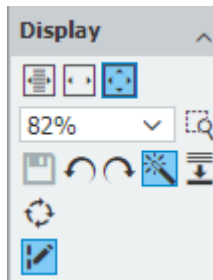




**Top Row:** Save, Edit, Print, Send, Show Index Entries

**Middle Row:** Activate/Deactivate doc overview, Start FullText search, FullText Search Continue, Check if Doc. has been changed, Download.

**Bottom Row:** One Click Indexing, Copy text to Clipboard, Document History, Send Request, Get Document link



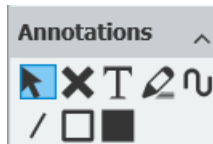
**Top Row:** Fit to width for optimized viewing, Fit to width – with margins, View whole page

**Second Row:** Zoom percentage, Zoom to selected zone

**Third Row:** Save Rotation, Rotate page left for viewing, Rotate page right for viewing, Sharpen image, Merge layers.

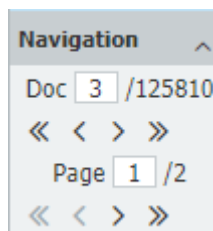
**Fourth Row:** Automatic image correction

**Fifth Row:** Turn on/off overlay



**First Row:** Turn on/off edit mode for annotations, Delete object, Write text on overlay, Highlight text, Draw freehand line

**Second Row:** Draw line, Draw rectangle, Draw solid rectangle (redact)



**Top Row:** Document within the results list or document trays

**Second Row:** First document, Previous document, Next document, Last document

**Third Row:** Page within the file (enter number)

**Fourth Row:** First page, Previous page, Next page, Last page



**Overview:** Page preview (you may need to hit the “+” to expand)

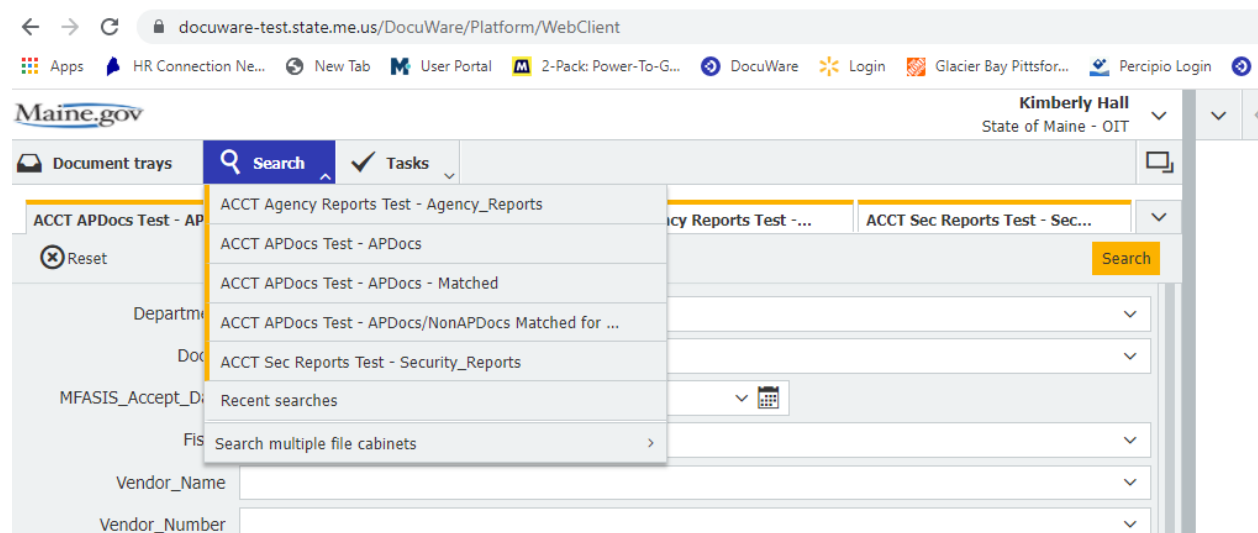
## VIEWING DOCUMENTS IN DOCUWARE

### Overview

What you can search/view in DocuWare will depend on the permission groups you currently have assigned to your user account. Your *Search* tool will show only the items that you have access to.

### Select the Search Pulldown

Select the down arrow next to the word *Search* on the main tool bar on the left window. Your available *Search* items will appear in this list. Select the search needed to locate your document.



The left portion of DocuWare will display all of document's index values that you can search for. Enter data in one or fields to narrow the search for your document, then select **Search**.

Search by one or more fields – The more fields searched by the more precise the list of documents on the result list will be.

There are dropdown lists available

If you search with nothing in the fields, it will return all records.

Range Searches – you can search a date range or any numeric fields.

Wildcard search can be used by entering an asterisk (\*) before or after text or between text.

Type an X in the date field for today's date.



docuware-test.state.me.us/DocuWare/Platform/WebClient

Apps HR Connection Ne... New Tab User Portal 2-Pack: Power-To-G... DocuWare Login Glacier Bay Pittsfor... Percipio Lc

Maine.gov Kimberly Hall State of Maine - OIT

Document trays Search Tasks

ACCT APDoc... ACCT APDoc... ACCT Agenc... ACCT Sec R... ACCT APDoc... ACCT Age... ACCT APDoc... X

Reset Search

Department	
DocID	
MFASIS_Accept_Date	
Fiscal	
Vendor_Name	
Vendor_Number	
Version_Number	
Status	Matched
FileName	
Original_FileName	
TIN	
Created_Date	
Modified_Date	
Document_Type	
Filing_Type	
Fiscal_Year	
SESC_Fiscal_Year	
Fund	
Funding_Profile	
Object	
Revenue	

## Accessing Documents

### Additional Search Operators

Operator	Entry in search dialog	Executed search
AND	"Miller" AND "Son"	searches for all documents containing Miller as well as Son in the index entry
OR	"Miller" OR "Son"	searches for all documents containing Miller or Son in the index entry
NOT	NOT "Miller"	searches for all documents with an index entry in the correspondent field but not containing Miller in the index entry
EMPTY()	EMPTY()	searches for all documents where the corresponding index field is empty
NOTEEMPTY()	NOTEEMPTY()	searches for all documents where the corresponding index field is not empty
CURRENTUSERSHORTNAME()	CURRENTUSERSHORTNAME()	searches for all documents where the shortname of the current user is the index entry
CURRENTUSERLONGNAME()	CURRENTUSERLONGNAME()	searches for all documents where the longname of the current user is the index entry
CURRENTUSEREMAIL()	CURRENTUSEREMAIL()	searches for all documents where the email address of the current user is the index entry


[Return to Index](#)

Index term you want to search	Enter in search dialog	Explanation
MILLER AND SON	"MILLER AND SON"	The quotation marks cause the whole string to be searched for, the AND is not evaluated as a logical operator
NOW OR NEVER	"NOW OR NEVER"	The quotation marks cause the whole string to be searched for, the OR is not evaluated as a logical operator
Program "Othello"	Program \"Othello\"	To ensure the quotation marks are evaluated as such in the search, a back slash must be placed in front of them.
Clever?123	Clever\?123	To ensure question marks are evaluated as such in the search, a back slash must be placed before the question mark.
	"Clever?123"	Alternatively, you can put the whole search string inside quotation marks.
C:\Documents	C:\\Documents	To ensure back slashes are evaluated as such in the search, another back slash must be placed in front of it.
Price List (UK)	Price List \"(UK)\"	To ensure the brackets are evaluated as such in the search, a back slash must be placed in front of them.
	"Price List (UK)"	Alternatively, you can put the whole search string inside quotation marks.

The results will be displayed in the left

The screenshot shows the DocuWare interface with a search results table. The table has columns for Type, Department, DocID, MFASIS\_Accept\_D..., and Fisc. The results list various documents from different departments like Legislative, Dept of Agriculture, Attorney General, and Judicial Dept.

Type	Department	DocID	MFASIS_Accept_D...	Fisc
PDF	30A Legislative	PRC30ATEST		
PDF	30A Legislative	GAX30ATEST		
PDF	01A Dept of Agriculture	GAX01ATEST		
PDF	26A Attorney General	GAX26A000026309		202
PDF	18W Div of Worker's C...	GAX18WWCM0208181...		
PDF	40A Judicial Dept	IETM40A12203121619		202
PDF	40A Judicial Dept	IETM40A12208801		202
PDF	40A Judicial Dept	IET40A12208803		202
PDF	40A Judicial Dept	IETM40A12208802		202
PDF	40A Judicial Dept	IETM40A12208803		202
PDF	40A Judicial Dept	IET40A12208804		202
PDF	40A Judicial Dept	IET40A12208801		202
PDF	40A Judicial Dept	IETM40A12208800		202
PDF	18W Div of Worker's C...	GAX18WWCM0208181...		
PDF	40A Judicial Dept	IETM40A12208804		202
PDF	40A Judicial Dept	GAX40A01209302		202

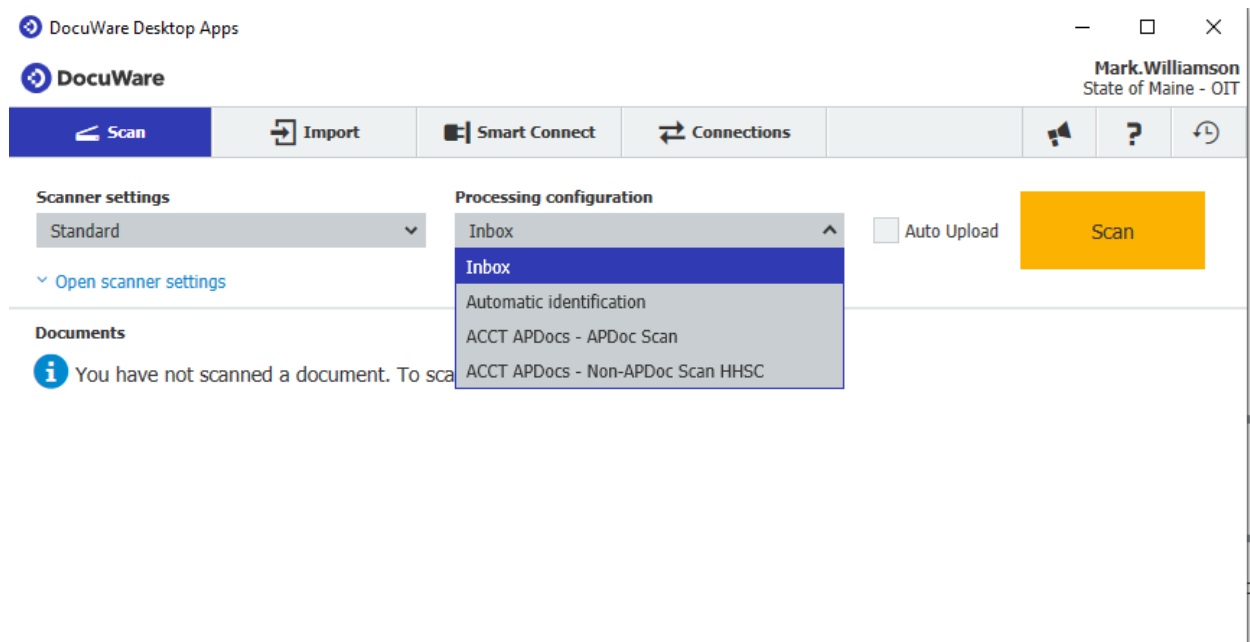
After searching, a result list will appear with documents that meet the search criteria

- Double click to open documents in the viewer
- Scroll left and right to see all index fields
- Result lists will display 100 documents per page
  - navigate to additional pages at the bottom of the result list
- Result list right click menu options – **Only if you have the ability to manage Unmatched documents**
  - Open in viewer/new viewer window
  - Edit – Open the document in its native editor (Word, Adobe, etc.)
  - Clip
  - Export options- send, email, download

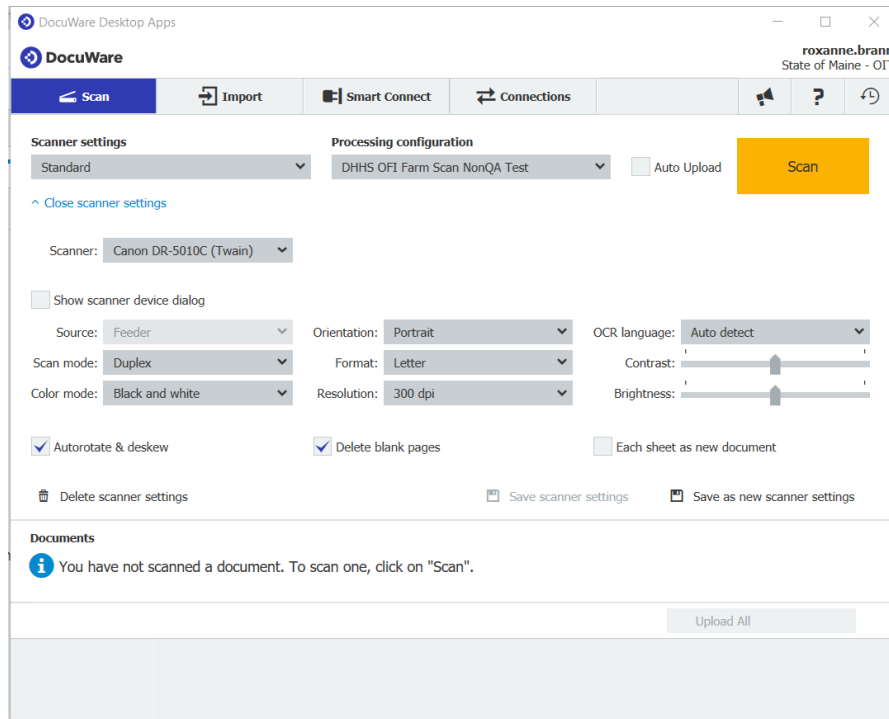
## DOCUMENT CAPTURE AND STORAGE USING A DEDICATED SCANNER

To scan you need the DocuWare Desktop App installed. The Desktop App needs to be connected via Desktop Apps>Connect to Desktop Apps (refer to the bottom of page 3). Additionally, you need to be connected to a scanner.

Click the Scan button from a document tray which Opens DocuWare Desktop

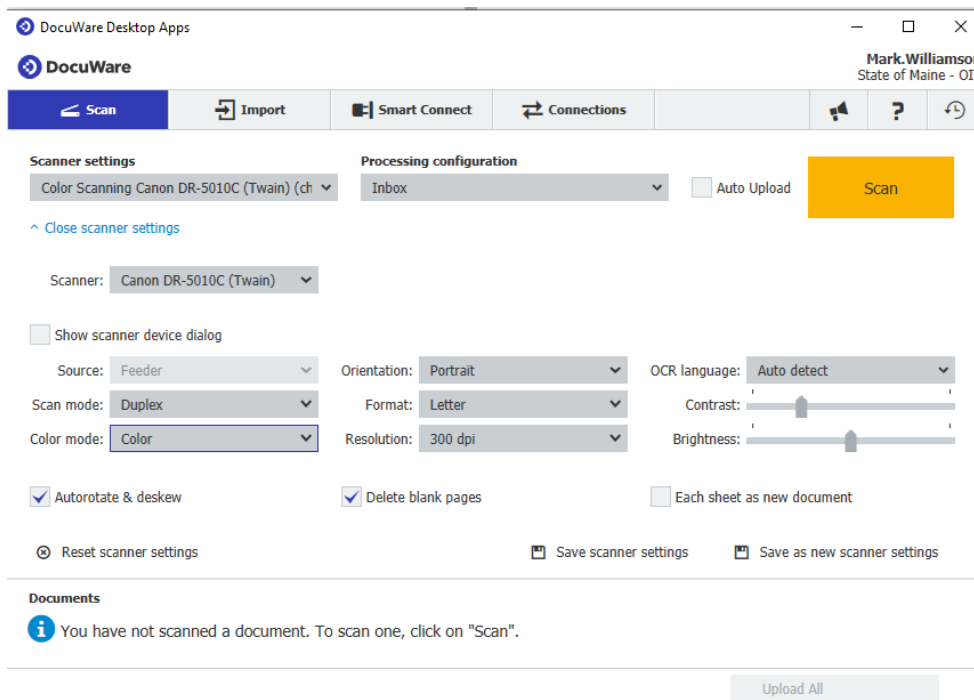


To look at the scanner settings, open the blue link that says Open Scanner Settings. This is where you can change the settings for Duplex, black and White or Color, Format and Delete Blank Pages. For Service Center Scanning the following should be set for the standard configuration. Duplex should be checked, Format should be letter, 300 DPI, Black and White, with the checkbox for Autorotate and Delete Blank Pages should be checked. If they are not, make the changes and press the save scanner settings button.

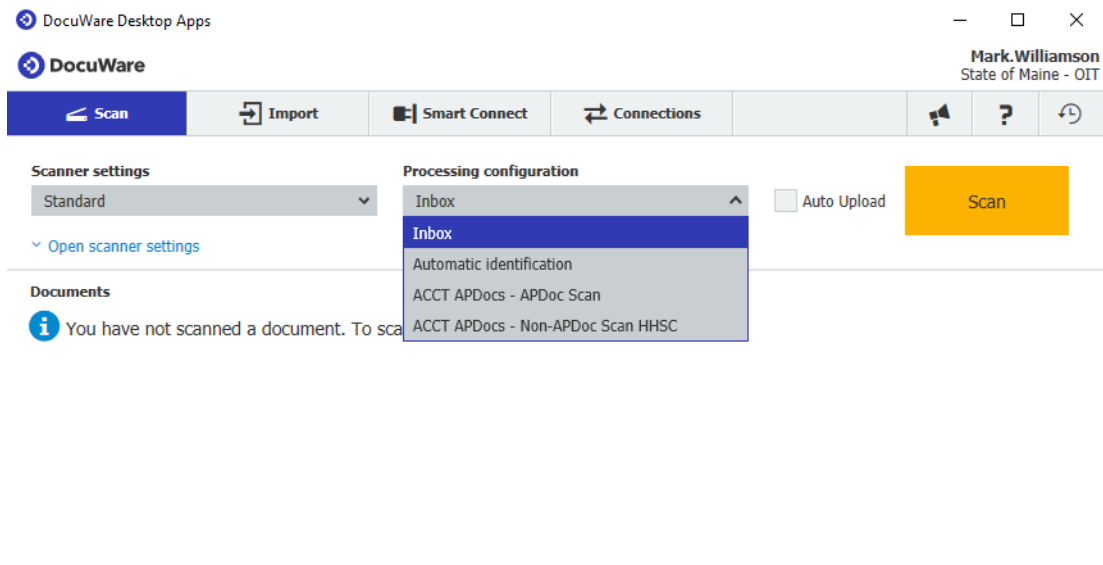


This should only need to be done once unless it needs to be fixed or adjusted.

To create a new Scanner Configuration for Color for example. Adjust just the color setting to color and then press Save New Scanner Settings and give it a Name of Color Documents or whatever you want to call it.



Before Scanning you need to press the appropriate Processing Configuration. Choose which type you are scanning (APDocs/Non-APDocs)

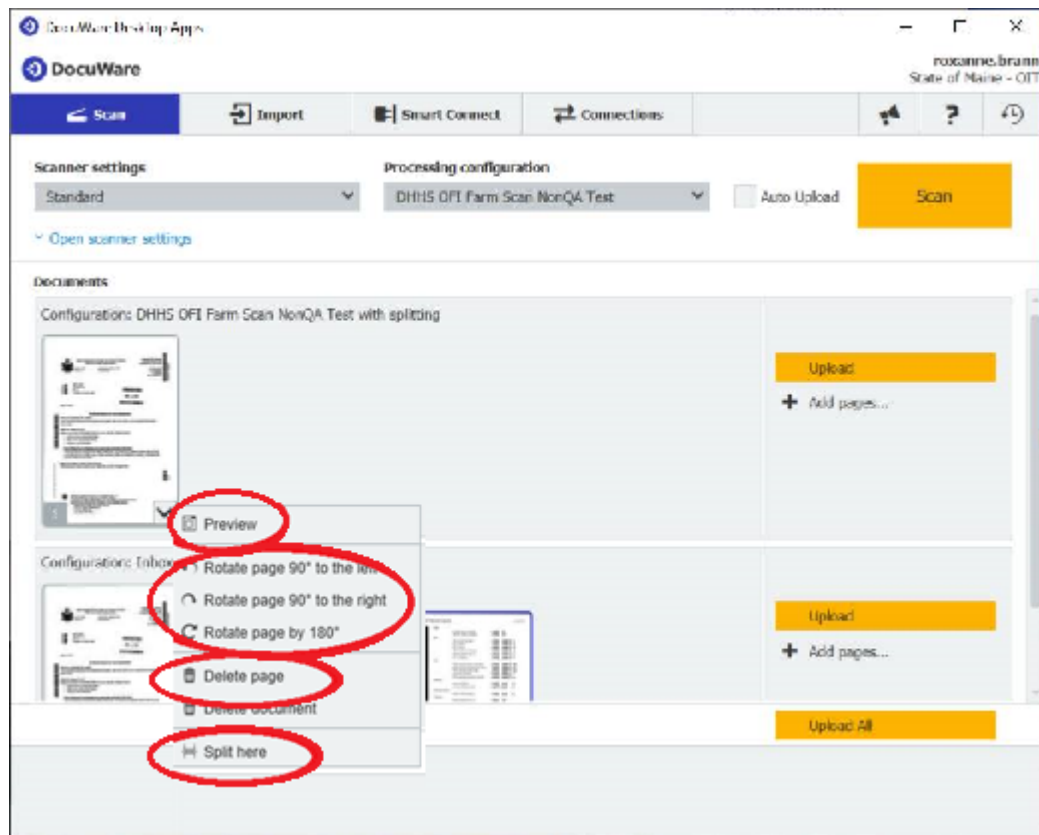


Load your documents into the scanner and press the Scan button. This will put the document into the viewer. It still is local to your PC until you press the Upload button. This is the time to clean up your document.

### Review and Clean-up the Scan Results

- Preview – See a larger scale version of the document
- While DocuWare will properly orient most documents, document rotation can be performed as needed
- Delete Pages
- Split Documents
- Add Pages – This will reinitiate the scanner to scan additional pages to the document in the row Add Pages was chosen from
- Drag and Drop pages to properly order the pages in a document
- Upload the document or all documents when done

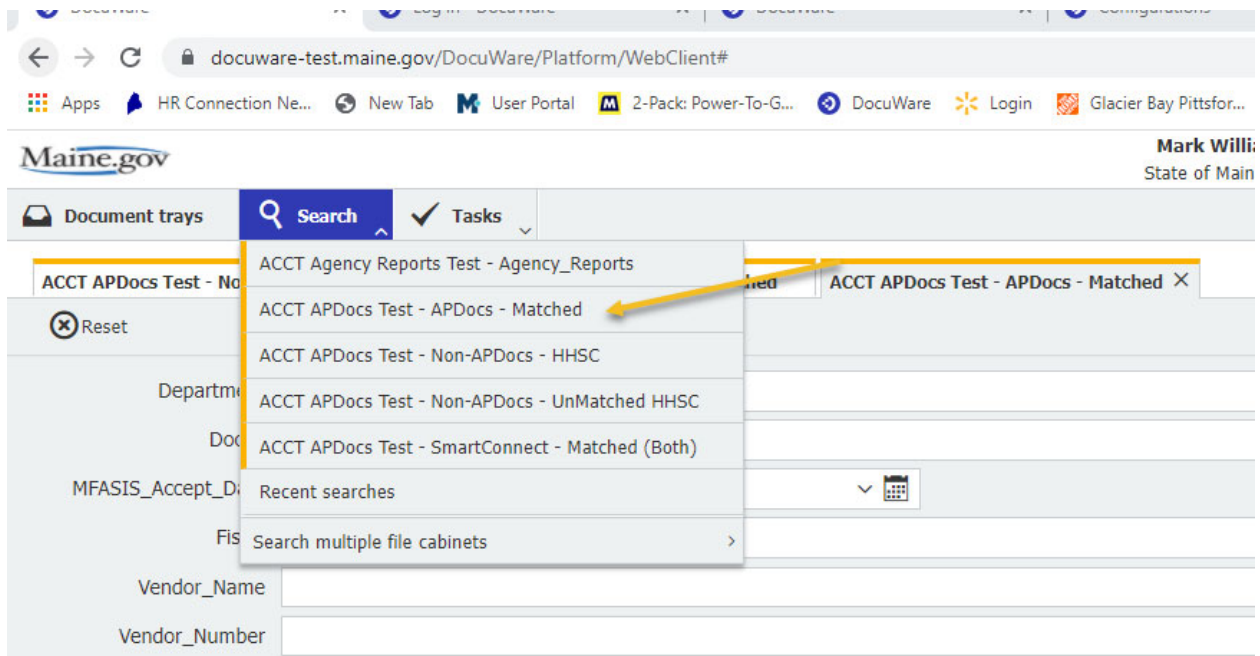
You can right click on the document and you have options to preview it larger, rotate, delete pages, or split documents. It is important to get the document right before uploading it to DocuWare. You can drag and drop the pages to put them in a different order or add pages right then and there from scan or import.



When the document is correct, press the upload button.

All scanned documents will go into the File Cabinet whether they read the bar codes or not.

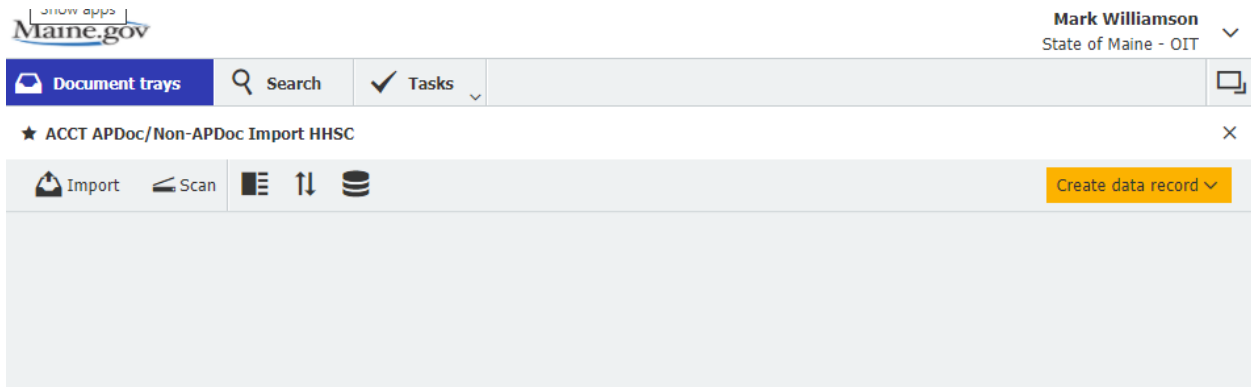
If the Bar codes are read properly and the document is indexed, it will automatically be marked “Matched” and you will be able to view the documents in the Matched Search. If the record is not matched (because it is not Final in Advantage), it will only be viewable by a person with Unmatched capability.



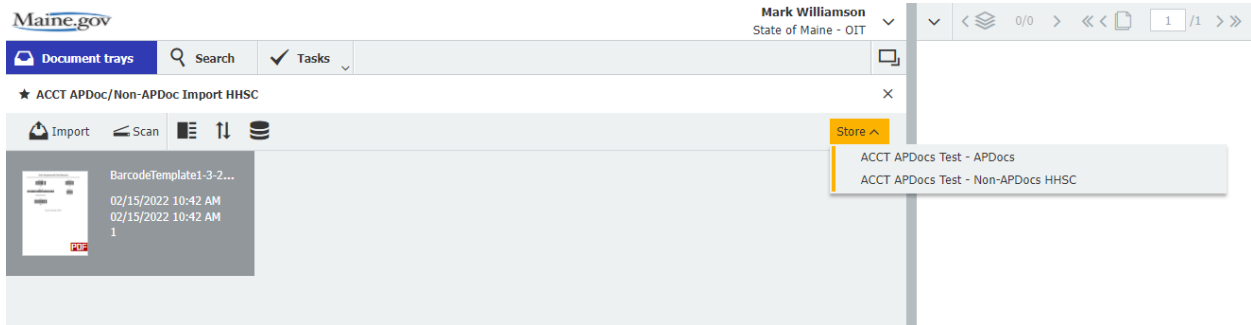


## IMPORTING A DOCUMENT

Each service center has their own tray and non-service center agencies have a tray that they share called General ACCT APDoc Import General Dpts. This is where documents can be imported into the system for APDocs and Non/APDocs for Service Centers. A tray is a location where you can import an electronic file or a scanned document and manually index the information into DocuWare.



To import a file, simply hit import and select the file from your computer. If you scan using an MFP, you can store the file in your e-mail or desktop and then drag and drop it into the Tray. Make sure your document is exactly the way you want to have it in the system before storing the file. Once you press the Store Button, you do not have permission to edit the file unless you have the ability to manage unmatched documents.



One you hit the store button, the indexing fields come up. If you are part of a service center, you can store APDocs or Non APDocs. Choose the one you want to store and the indexing fields will show up. All you have to do is store the Department, and the DocID field. The rest is filled in for you and will populate the rest of the fields once matched to the Advantage Database.

The screenshot shows the DocuWare interface for storing a document. At the top left is the 'Maine.gov' logo. At the top right, the user is identified as 'Mark Williamson, State of Maine - OIT'. Below the navigation bar, the document is being stored to a tray named 'ACCT APDocs Test'. The form includes the following fields:

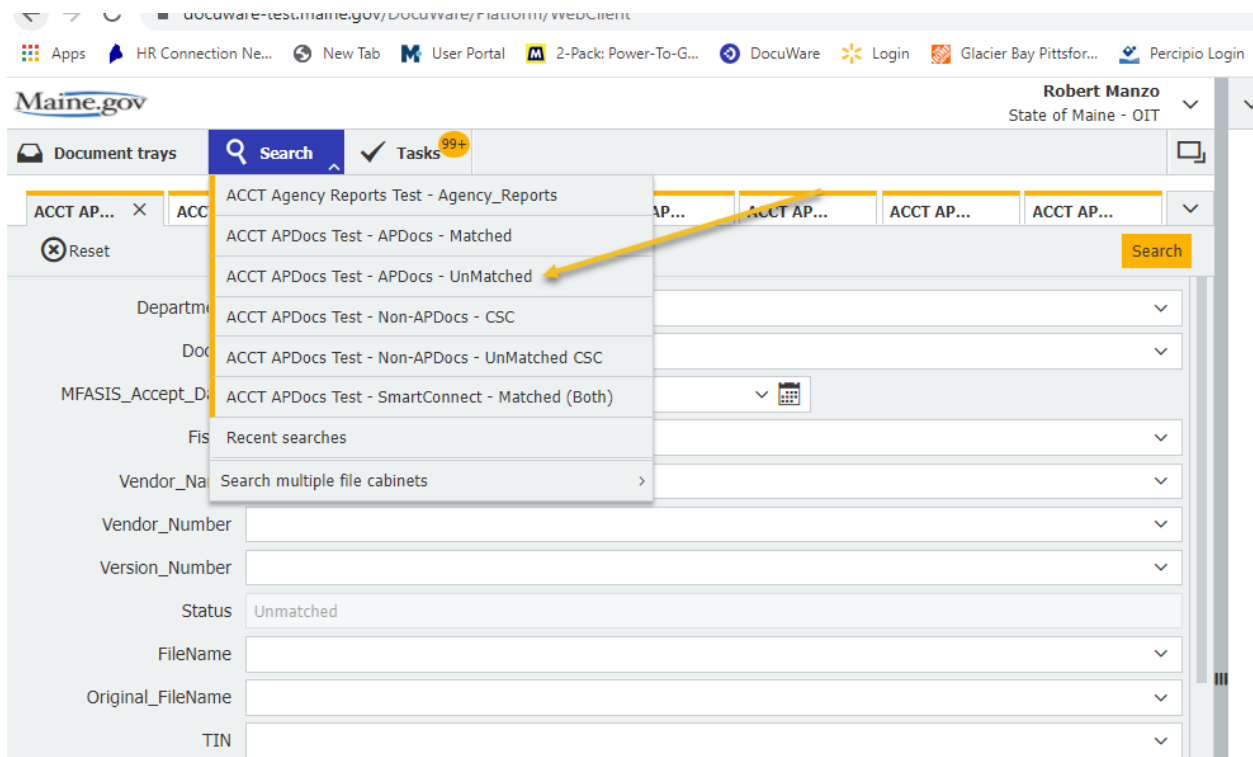
- Department \*: 10A Dept of Human Services
- DocID \*: GAX10ATEST
- MFASIS\_Accept\_Date: (calendar icon)
- Fiscal: (dropdown)
- Vendor\_Name: (dropdown)
- Vendor\_Number: (dropdown)
- Version\_Number: (dropdown)
- Status \*: Match Needed
- FileName: (dropdown)
- Original\_FileName: (dropdown)
- TIN: (dropdown)
- Created\_Date: 02/15/2022 (calendar icon)
- Modified\_Date: (dropdown)

Once again, if you store a document with the wrong DocumentID that isn't in the system, the status will remain unmatched and only the people with "Unmatched Role" will be able to see and fix those documents. Make sure the Document ID is correct and matches what is in Advantage. **No spaces please.**

If the file matches, you will be able to see it in the search for matched documents. If it is a service center Non-AP Document, you will be able to see them all.

## EDITING DOCUMENTS IN DOCUWARE FOR DOCUMENT UNMATCHED ROLE – LIMITED USERS

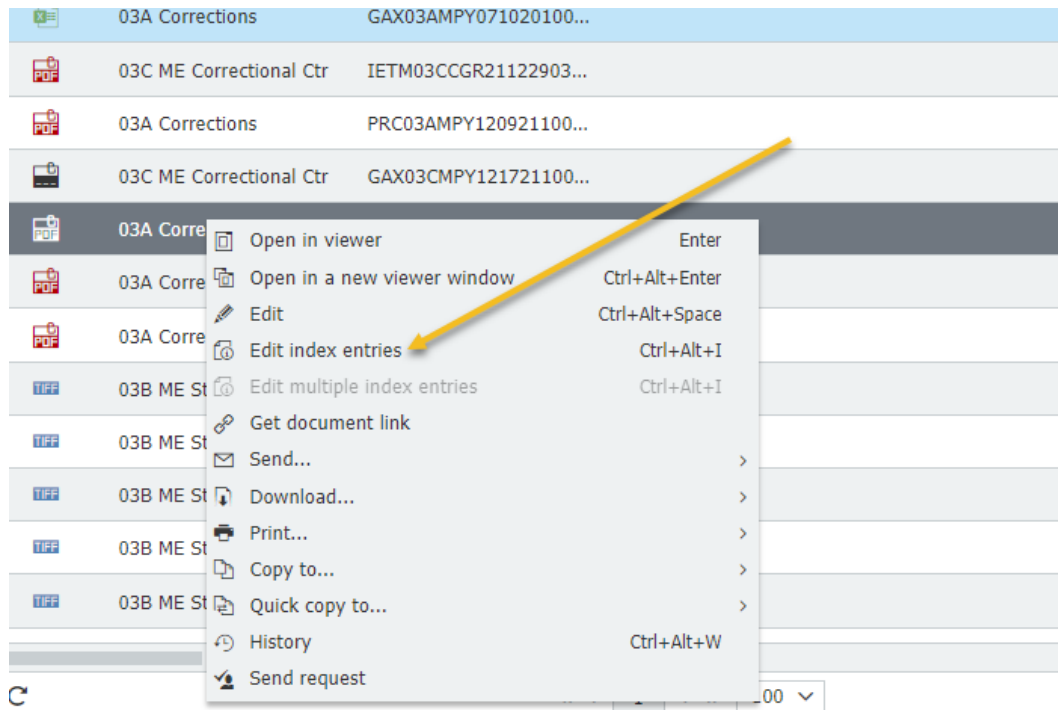
To search for the unmatched records, go under the search tab and select ACCT APDocs Test – APDocs – Unmatched



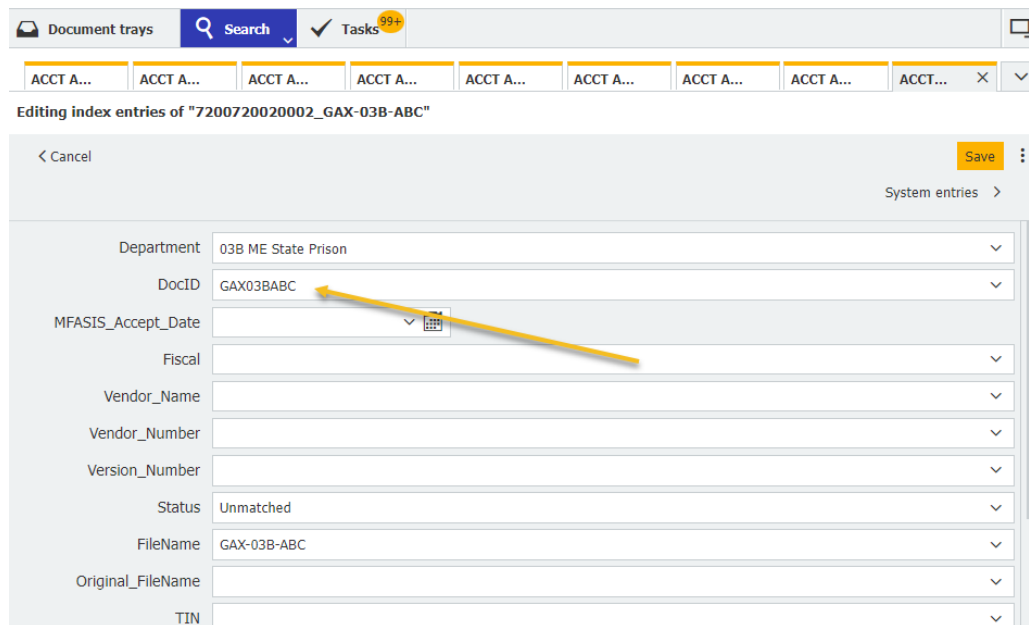
This gives you a listing of all records that are unmatched.

### Editing Index Entries

To edit index entries for one document in a result list right click from result list and choose Edit index entries. A dialog similar to the store dialog will open and allow you to adjust index entries according to your permissions. Fix the DocumentID field so that it will match what is in Advantage. This must have no spaces and match the criteria of Doc\_CD, Doc\_Dept, Doc\_ID i.e. (GAX03A1234567). If it is unmatched, it isn't in our listing for our view which is the following document codes: (ABSJ, CEC, COAJ, CR, CRAJ, CRCC, CREF, CRNG, CRRT, GAE, GASE, GAX, IET, IETM, JV, JVA, JVC, PRC, PRW) These are the only types of documents that will be marked matched.



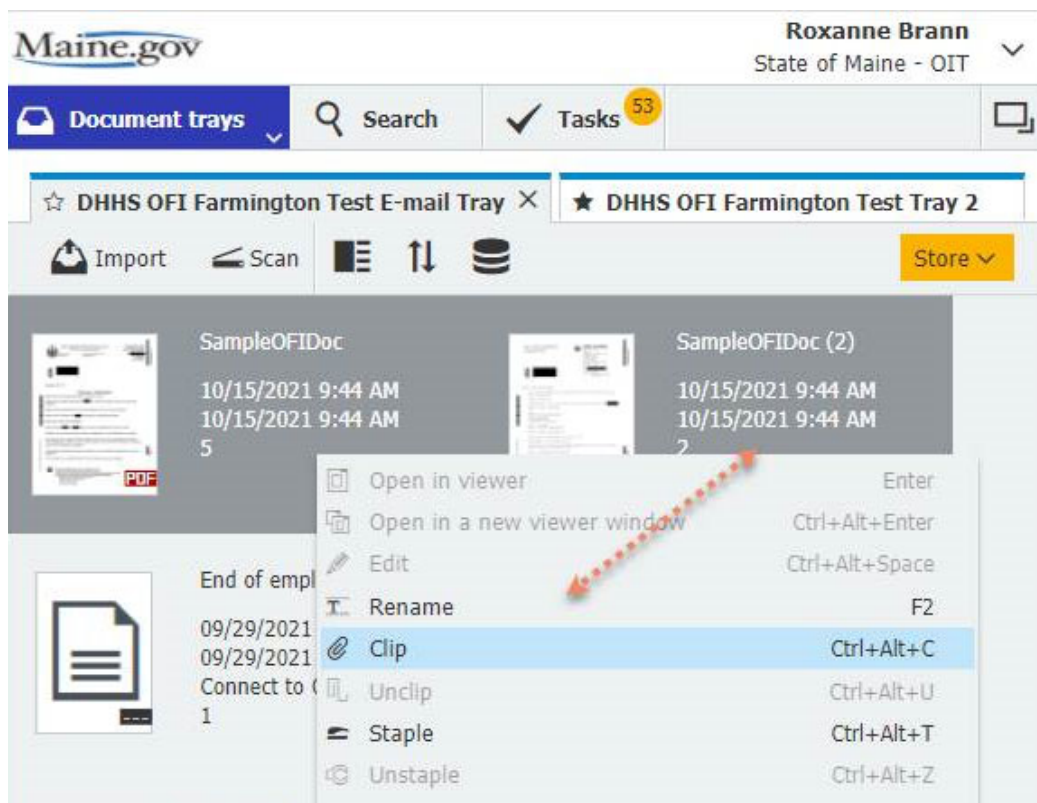
Fix the DocID so it matches Advantage DocID.



## Clipping Documents

If you need to add to an existing document while it is in the tray you can add another document to that document by Clipping the documents together.

To clip from a document tray select 2 or more like PDFs, right click and choose clip. The documents will be clipped in the order they are selected



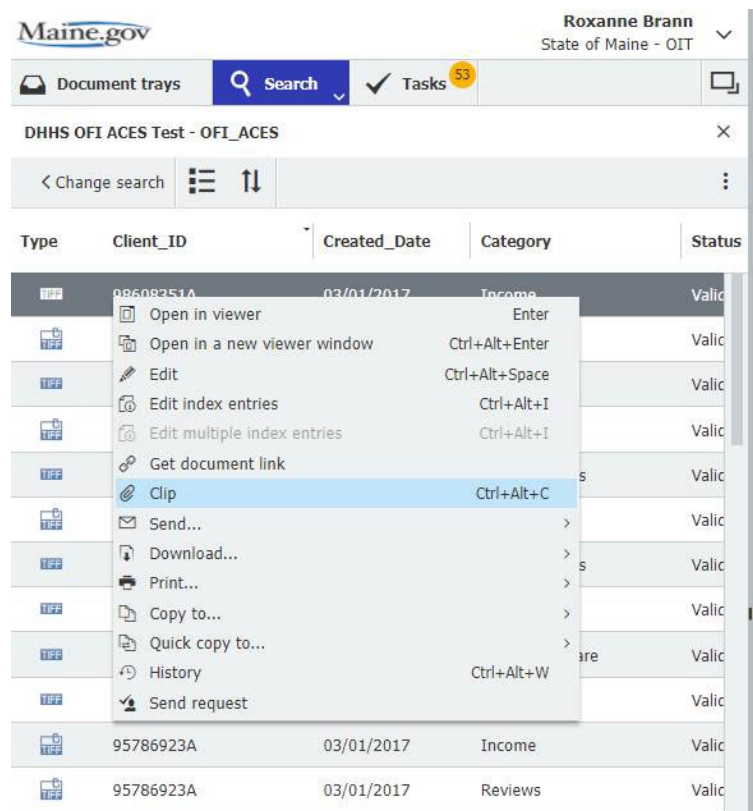
All file formats can be clipped.

- If you clip 5 documents with 3 pages each, they are getting summarized to one document, but the page count of the single documents remains, same as the file format.
- If you unclip this summarized document again you will get 5 documents with 3 pages each

## Clipping Documents from A File Cabinet

If a document is already stored into the file cabinet, you can clip a file to the beginning or the end of the file **only if you have the “Unmatched Role” which allows you to edit a file.**

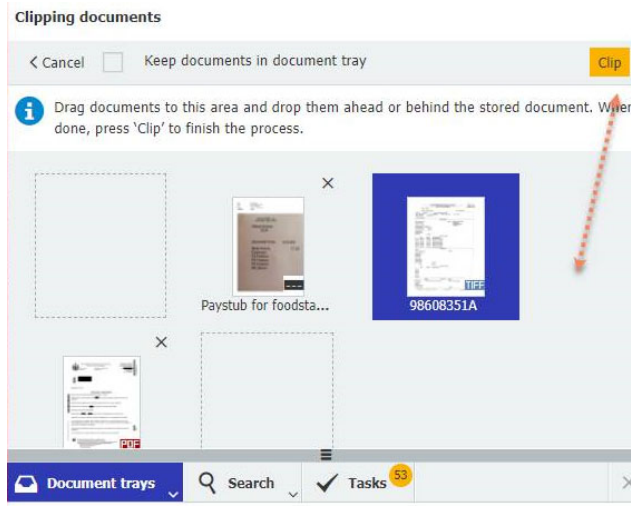
Search for and select the document you want to clip,  
Right click and choose Clip.



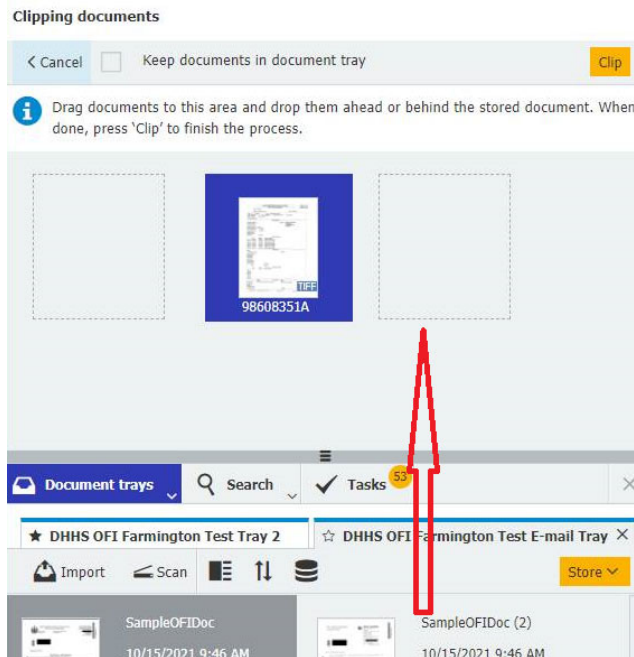
A dialog will open showing the selected document on the top and the documents in your document tray on the bottom.

Drag the document/s you want to clip from the document tray to the front or back of the selected document.

Click the clip button. You will then be returned to the result list.



Drag the document(s) you want to clip from the document tray to the front or back of the selected document.



Click the clip button. You will then be returned to the result list.

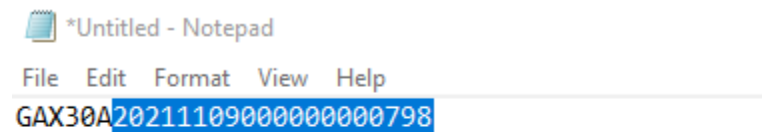
## USING SMARTCONNECT FOR SEARCHES (IMAGEIT REPLACEMENT)

SmartConnect is the product used in DocuWare that works similar to ImageIt. You must have DocuWare Desktop and be connected to have this product work for you. [See Page 3 for Connect to DocuWare Desktop App instructions.](#)

You can use SmartConnect with any application. You have to highlight your DocID and press Control F3 to invoke the search.

If you only have part of the DocumentID, you can highlight just part of it and hit Control F3

This will bring back either one document that matches the criteria or a list of documents that matches the criteria. In Advantage a lot the screens are split up so just highlight the Document ID field.



This will only bring back Matched records for both APDocs and Non-APDocs and what you have permission to. If you need a search for Unmatched Non-APDocs, it will have to be set up with a different Hot Key by the Administrator.