Introduction

DocuWare is a Document Management and Workflow tool used widely across MCPS. Selected Environmental Services documents are being managed within a *Cabinet* in DocuWare. This guide has been developed to assist you with searching for and working with these documents. It also addresses common questions you may have when using DocuWare. Although a considerable amount of planning, testing, and User Acceptance Review (UAR) have gone into the development of the Environmental Services' Cabinet, it's not unusual to have questions or even experience an issue when using the system. Please review this document for sections that may apply to your day-to-day use of DocuWare and to get answers to Frequently Asked Questions in the *FAQ* section at the end of this guide.

Overview of Using DocuWare - *The Basics*

Searching for documents within the Environmental Services Cabinet is quite simple. For District and School Administrators, a pre-defined document *Search* is available to locate documents by a number of search criteria. You can easily go straight to the *Most Recent Management Plan Inspection* document(s) or retrieve all documents for a specific school or district building. *Search Results* can be sorted on-the-fly to locate a specific document more easily.

The basic steps for using DocuWare to locate Environmental Services documents are listed below. Each of these is illustrated in more detail in the sections that follow.

- Login to DocuWare using *Single Sign-On (SSO)* with your network credentials.
- Use the pre-defined DocuWare *Search* to retrieve documents related to your building.
- View (and optionally print) documents.
- Logout of DocuWare

DocuWare Login

DocuWare uses your network credentials with SSO to grant secure access. Your credentials uniquely identify you and grant specific permission to retrieve and work with documents. After using either the https://docuware.mcpsmd.org/DocuWare/Platform/WebClient URL or the link on the MCPS Intranet to get to DocuWare, you'll be prompted with a screen similar to the one on the right. From here, choose the *Continue with Microsoft* option.
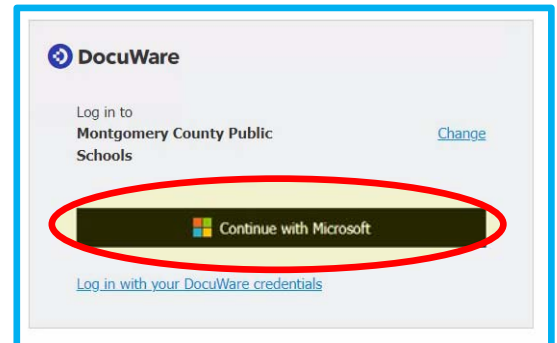
The 1st time you access DocuWare using SSO you may see one of the variations of the following screens including the *Authenticator* screen on the right.
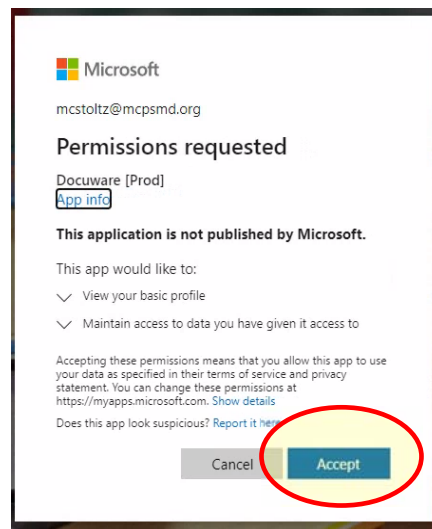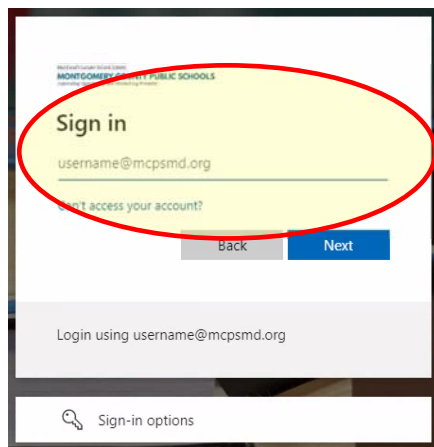
Please note the following two alerts related to the screen to the right.

- The *Username* and *Password* option is only used for a *DocuWare Service Account* and will not work for a standard log in using SSO.
- Do not use the *Reset Password* option. Your credentials are not managed by DocuWare since SSO is being used.
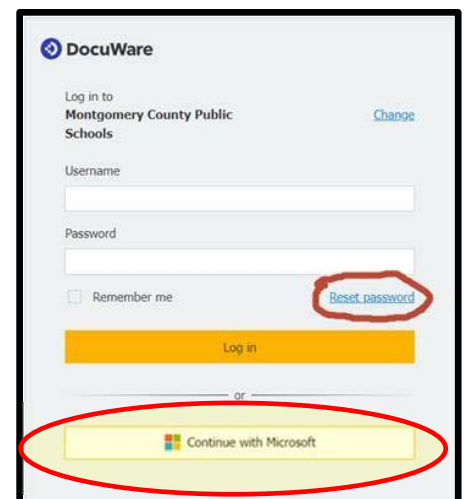
DocuWare Tutorial Screen

On your 1st login, you may see the DocuWare *Tutorial* screen displayed as shown below. If you'd like to prevent the *Tutorial* screen from displaying each time you enter DocuWare in the future, uncheck the *Show this Tutorial again* checkbox in the lower-left-hand portion of the screen as highlighted below.
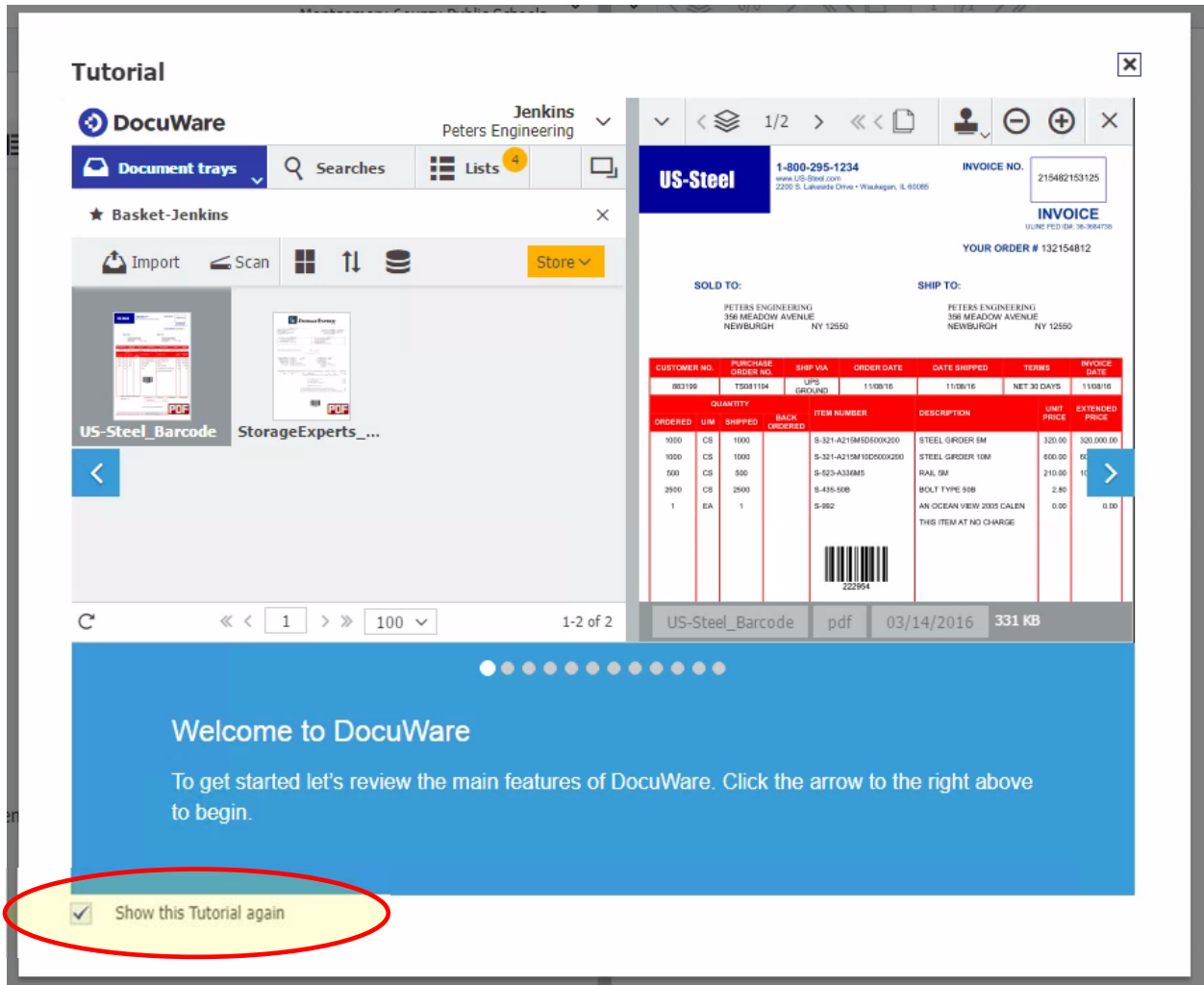
Searching for Documents

After logging into DocuWare, all *Searches* for which you have permission will be listed when you click on the down arrow on the blue *Search* button. If accessing Environmental Services' documents is your only interaction with DocuWare, then the appropriate *Search* should be presented automatically. For example, the *School Administration Documents* search is shown highlighted in yellow in the screen shot below. If you have access to *Searches* in other DocuWare *Cabinets*, such as *OHRD Hiring Manager* as part of *Internal Applicant Records (IAR)*, then you'd see both *Searches* listed in the drop down.

To find your desired document(s):

- **Supply the search criteria:** In the red oval in the screen shot below, you can see the various index fields by which you can search. Most of these fields have *Select Lists* associated with them so you may pick the *School Number, School Name, Document Type* or *Document Name* from a defined list of options. You may also begin typing in any field and DocuWare will auto-fill available values as you type. Finally, the more search criteria you enter, the more narrow the *Results*.

- **Click on the Orange Search Button:** After you've supplied your search criteria, click on the orange *Search* button. It's in the green oval in the following screen shot.
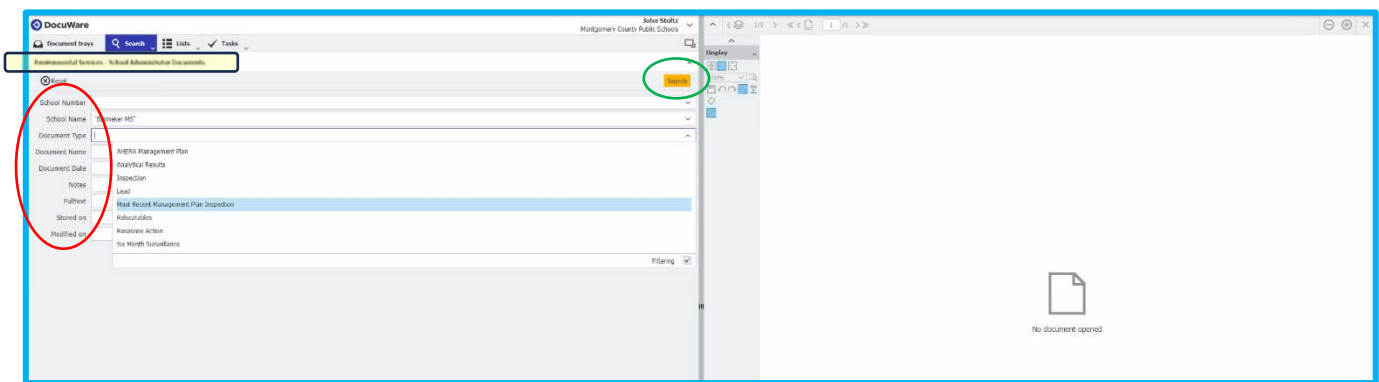
- **View the *Results*:** All documents that meet your search criteria will be listed in the *Results* window as shown below. The 1st document in the *Results* will automatically be displayed in the viewing pane. Double-clicking on any record will also open the document in the viewing pane. Finally, you can right-click on any record in the *Results* and be presented with the option to *Open in Viewer* or *Print*. You have no permissions to modify, delete, download, or email the document.

Use *Change Search* to go back to the search criteria.
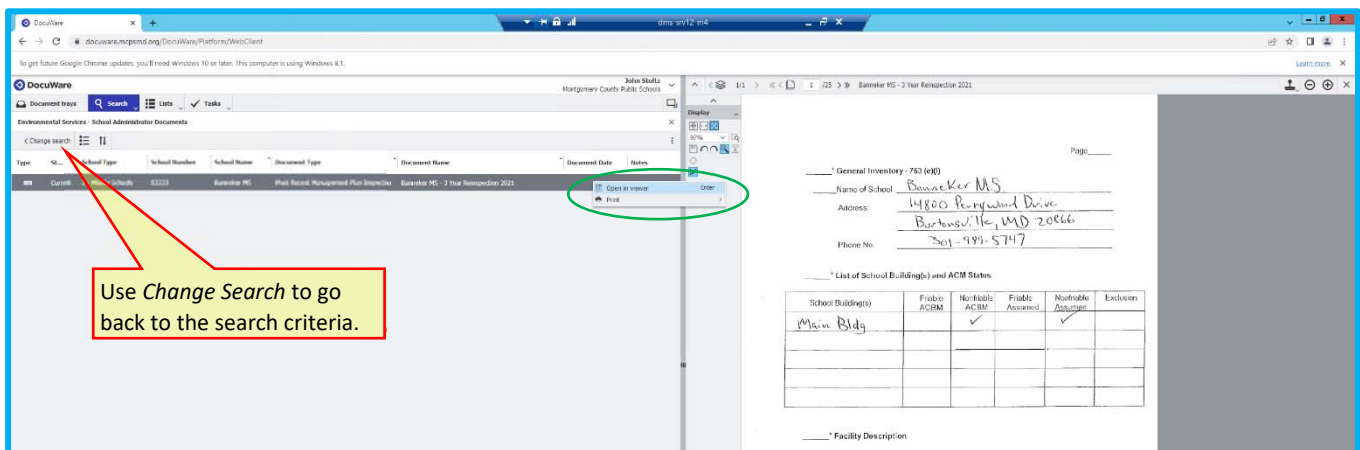
Using the Viewing Tools

The screen image below shows the various tools available to control how the selected document is viewed and how to navigate through all documents in the *Results*. Since you have only *View* and *Print* permissions, any display changes, such as rotating a document for easier viewing, will not be saved.

The 1st set of navigation tools allow you to move from document to document if the *Search* returns more than one document.

The 2nd set of navigation tools allow you to move through the pages *within* the document being viewed.

The *Display* toolbar allows you to modify the size and orientation of the document.

The + and – buttons adjust the size of the document. The *X* closes in the current document.

Additional DocuWare Features

## Saving a Frequently Used *Search* as a *List*

A *Search* such as *Most Recent Management Plan Inspection* may be used frequently. DocuWare gives you the option to save a *Search* and its criteria as a *List*. Creating a list from the current search results makes sure this *Search* is constantly updated and saves you the trouble of having to run the *Search* each time you want to look for a specific set of documents. When you want to view the results for the saved *List*, you just click on the *List* button in the top toolbar.

To save the currently displayed *Results* as a *List*, do the following:

- **Save the *List:*** Click on the vertical ellipsis as shown to the right. Choose *Save this search as a list*. This should be your only option.
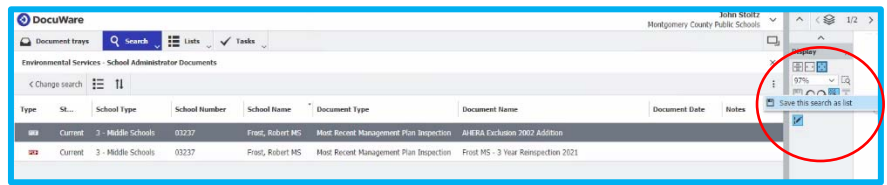
- **Name the List:**

  o Enter a meaningful name for the *List*.
  o Choose the *Automatic Refresh* frequency. The default setting is *30 seconds* and it's OK to leave it at that frequency.
  o Click on *Save*. It's circled in green in the image to the right.
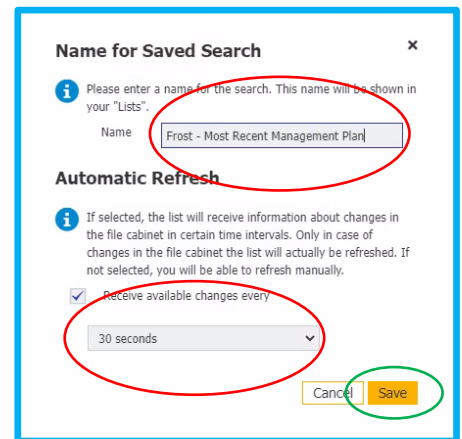
Using the Saved *List*

To see the *List*, click on the *Lists* button in the top toolbar as shown to the right. Any saved *Lists* will be displayed. Simply click on the desired *List* to view the current *Results*.

The *Trashcan* icon to the right of the *List* is used to delete the *List* and <u>NOT THE DOCUMENTS IN THE LIST.</u> So, you don't need to worry about accidentally deleting a set of documents.
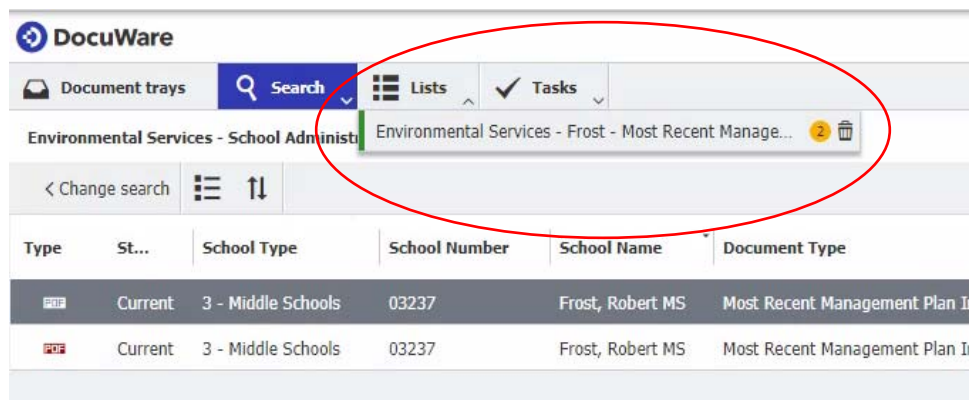
Additional DocuWare Features - *Continued*

Setting Viewing Options in *Profiles & Settings*

DocuWare gives you the flexibility to change the way the viewing pane for a document is presented. All the screen shots presented in this guide have shown the default setting which is:

- **Show DocuWare Viewer always in the same window:** This setting shows the document next to the *Results* in the same window.

The 2 other available settings are:

- **Open *DocuWare in a new window:*** Choosing this option will open a new window containing just the document and navigation controls. This setting allows you to have multiple documents open simultaneously.
- **Open *DocuWare with index dialog in a new window:*** Choosing this option will open a new window containing the document, its index values, and navigation controls. This setting also allows you to have multiple documents open simultaneously.

To change the *Settings,* do the following:

- Click on the down arrow next to your Username and select *Profiles & Settings* as shown in the red oval below.
- Click on the *Viewer* tab shown in the green ovel below.
- Click on the desired viewing option shown in the blue oval below.
- Click on the orange *Save & Close* button on the bottom right of the dialog.

Feel free to experiment with each of the options – you can't hurt anything by changing this setting.
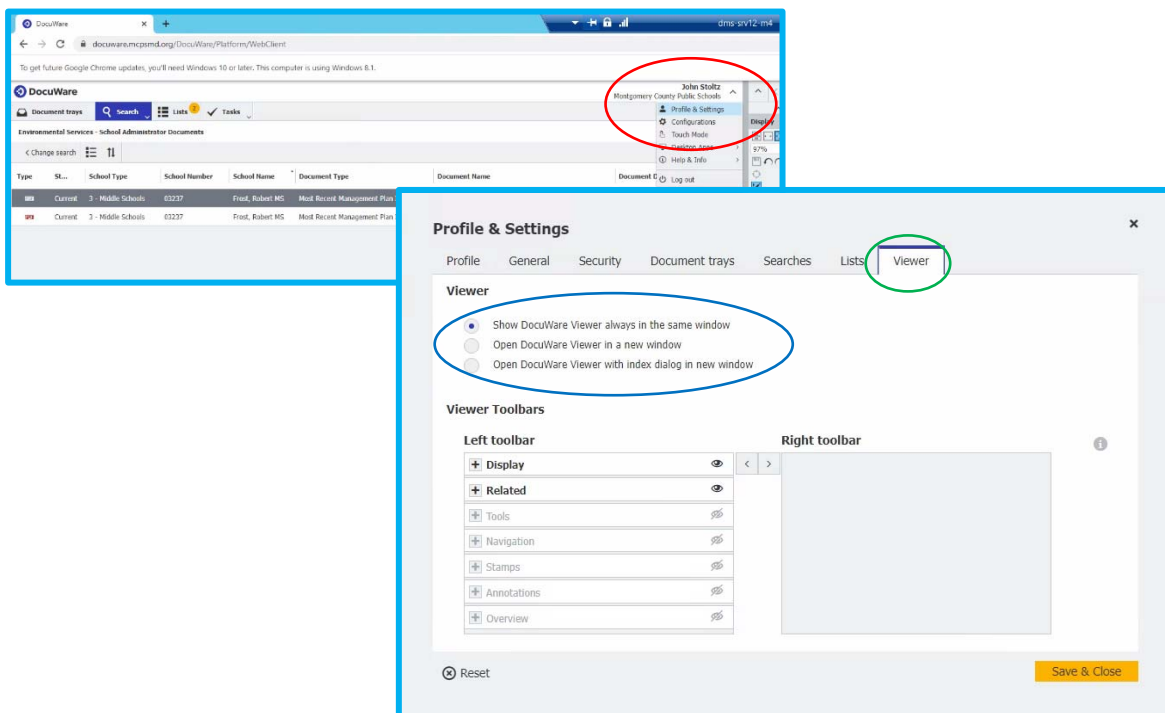
FAQs and Support

As mentioned earlier, although a considerable amount of planning, testing, and UAR has been conducted, it's not unusual to have questions or even experience an issue using the software. You may be able to resolve some issues yourself and others may require technical support from the Help Desk. Please refer to the table below for common issues that you may experience. It's important to remeber that the 1st step in seeking support with any issue you cannot resolve on your own is to submit a *Help Desk Ticket*. The Help Desk has been briefed on common support issues related to DocuWare and they are the experts in dispatching the appropriate resource to quickly and efficiently provide assistance.

FAQ or Support Issue	Description	First Course of Action	Second Course of Action
Can't find URL or link to DocuWare	You can't find a way to access the DocuWare application	Confirm you're using https://docuware.mcpsmd.org/DocuWare/Platform/WebClient or going to the link on the MCPS Intranet	Submit a Help Desk Ticket
DocuWare Login not working	You receive a message indicating that a valid user name/ email address has not been found in DocuWare that matches the AD account or Login fails.	Confirm that you're logged into the workstation with your credentials and try again.	Submit a Help Desk Ticket
Can't see a Search for Environmental Services Documents	After successfully logging-in to DocuWare, no searches prefaced with "Environmental Services" appear.	Click on the dropdown arrow in the blue *Search* button on the DocuWare screen to display all available Searches.	Submit a Help Desk Ticket
Can't find the Document you're looking for	You successfully log into DocuWare but cannot see the documents for a specific building, or you can't see the specific document you're looking for.	Confirm that you're using the correct Building Number or Name and that you've entered correct search criteria.	Submit a Help Desk Ticket
Found duplicate documents	When searching for a specific document, multiple results are returned that appear to be the same document.	Verify that the documents are exact duplicates and not just similarly named	Submit a Help Desk Ticket
Document returned in the Search does not match the search criteria	There appears to be a mismatch between the index data and the document returned.	Confirm the search criteria and the document in question	Submit a Help Desk Ticket
As a school Administrator or Building Administrator, you're able to perform functions on the document other than "Print" or "View"	School and Building Administrators should only be able to View and Print documents.	Submit a Help Desk Ticket	
The DocuWare Tutorial Screen continues to display	Upon logging into DocuWare, the Tutorial screen displays and you must close it to view the Search Screen	Make sure the "Show this Tutorial again" checkbox in the lower left-hand corner of the Tutorial screen is unchecked.	Submit a Help Desk Ticket