

DocuWare for Smart Document Control

User Manual

Answers and how-to guides for users of the preconfigured solution
DocuWare for Smart Document Control



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1 User management

1.1 User roles of the solution

The following user roles are available in the solution:

Default Organization role

Default user role of the DocuWare system. The role is automatically assigned to all users.

Organization Administrator

Default user role of the DocuWare system. The role is automatically assigned to the registration user of an organization and cannot be transferred.

DW - Administrator

Members of this user role manages the solution, has full access to the configuration, and all file cabinets. The administrator can, for example, create new users or adapt the solution's select lists. The registration user of an organization is automatically member of this user role (login via *username.admin*).

DW - Basic Functions

All users of the solution have to be members of this role to be able to store, search and edit documents.

DW - Extended Functions

Provides access to further preconfigured components especially for advanced managing contracts and proposals.

Depending on their user roles, users can see and use different elements of the solution in their DocuWare Client.

The following chart provides an overview of the available features for each role

	DW - Administrator	DW - Basic Functions	DW - Extended Functions
File Cabinets			
DW - Documents	+	+	+
DW - Select Lists	+		
Document Trays			
DW - First Steps and more	+	+	+

	DW - Administrator	DW - Basic Functions	DW - Extended Functions
DW - Inbox Administrator	+		
DW - Inbox <i>individual</i>	Created automatically with user creation	Created automatically with user creation	Created automatically with user creation
DW - Proposals			+
DW - Contracts			+
Store Dalogs - Documents			
DW - Documents - For All		+	
DW - Documents - For Some		+	
DW - Documents - For Me		+	
DW - Documents - Contract			+
DW - Documents - Proposal			+
DW - Documents - All Fields	+		
Store Dalogs - Select Lists			
DW - Select Lists - Document Type	+		
DW - Select Lists - All Lists	+		
Search Dialogs - Documents			

	DW - Administrator	DW - Basic Functions	DW - Extended Functions
DW - Documents - All Documents		+	
DW - Documents - Manage Access		+	
DW - Documents - All Fields	+		
DW - Documents - Contract			+
DW - Documents - Proposal			+
Search Dialogs - Select Lists			
DW - Select Lists - Document Type	+		
DW - Select Lists - All Lists	+		
DW - Select Lists - Version		+	
Lists			
DW - Documents - My Documents		+	
DW - Documents - All Docs Shared With Me		+	
DW - Documents - All Docs Shared by Me		+	
DW - Documents - Shared With Me - Read	+		
DW - Documents - Shared With Me - Edit	+		

	DW - Administrator	DW - Basic Functions	DW - Extended Functions
DW - Documents - Assigned by Me		+	
DW - Documents - Assigned To Me Due (Next 14 Days)		+	
DW - Documents - Assigned To Me Due (Today)		+	
DW - Documents - Require Action Within 90 Days			+
DW - Documents - Require Action Within 60 Days			+
DW - Documents - Require Action Within 30 Days		+	
DW - Documents - Require Action Date Overdue		+	
DW - Documents - My Documents - Delete Scheduled		+	
Folders			
DW - Documents - Doc Type-Company		+	
DW - Documents - Company-Doc Type		+	
DW - Documents - Projects			+
DW - Documents - Proposals			+

	DW - Administrator	DW - Basic Functions	DW - Extended Functions
DW - Documents - Contracts			+
Stamps			
DW - Share Document		+	
DW - Manage Required Action		+	
DW - Delete in 30 Days		+	
DW - Cancel Deletion		+	
DW - Assignment		+	
DW - Assignment Complete		+	

Roles are assigned when a user is created (page 8) in the User Management within the Roles tab. In the solution DocuWare for Smart Document Control, user roles do not define who is allowed to read or edit a document or who owns it. These permissions are assigned to the document directly when a document is stored (page 10).

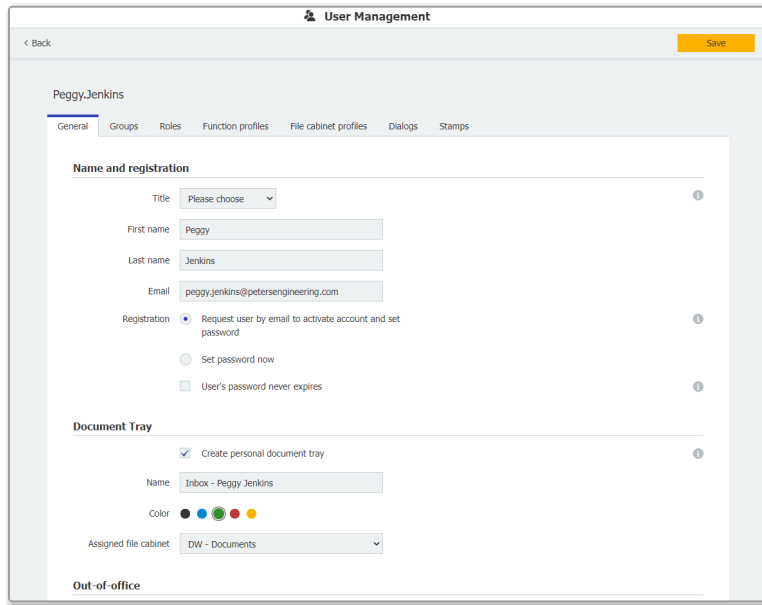
1.2 Create new users

As Administrator (page 4) of the solution you can add new users in a few steps.

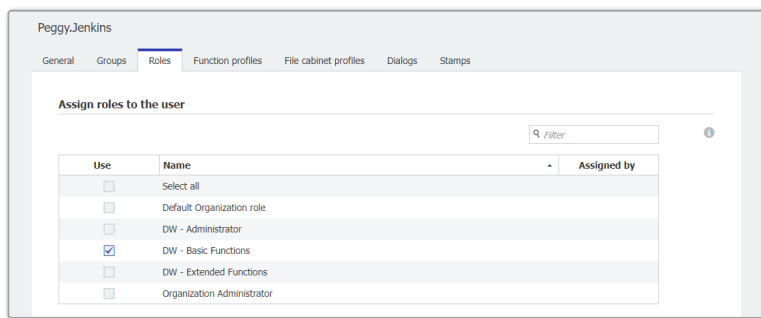
Here's how:

- In your DocuWare Client open *Configurations* via the main menu (click on your username) and go to *User Management* in the *General* section.
- Click on the *New user* button at the top left to create a new user.
- In the *New unnamed user* box enter the username (this will be used as the DocuWare log-in). Use a period to separate first name and last name (firstname.lastname); hyphenate double names (firstname-firstname.lastname).
- Enter all appropriate user information. The e-mail address is required. This is because users are notified via email of tasks or sent a link to reset their password.
- By default, a personal document tray Inbox is automatically created for each user:

- For clear differentiation of the trays, we recommend including the name of the user after the suggested tray name.
- Select a color indicator for your tray. Assign the file cabinet *DW - Documents* to the tray.



- Switch from the *General* tab to the *Roles* tab and **assign the user at least** to the role (page 4) *DW - Basic Functions*.



Use	Name	Assigned by
<input type="checkbox"/>	Select all	
<input type="checkbox"/>	Default Organization role	
<input type="checkbox"/>	DW - Administrator	
<input checked="" type="checkbox"/>	DW - Basic Functions	
<input type="checkbox"/>	DW - Extended Functions	
<input type="checkbox"/>	Organization Administrator	

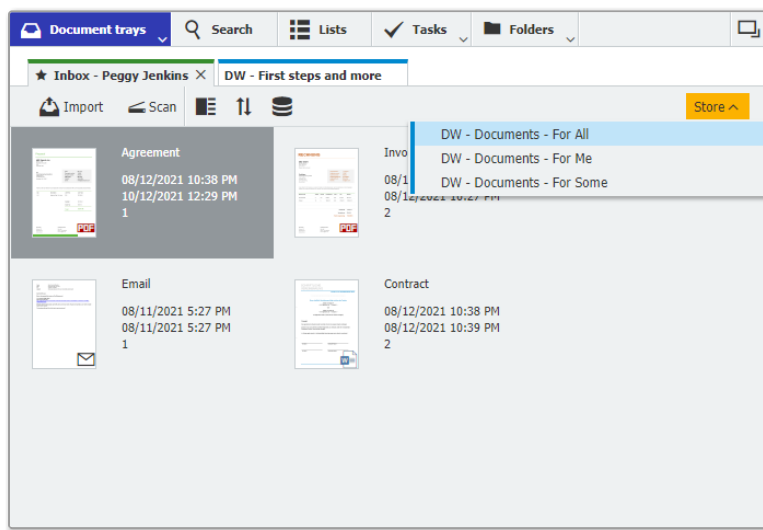
- Click on *Save* (upper right) to complete the new user creation. The employee receives a registration e-mail for the new user account and DocuWare login information based on your selections within the user creation.

2 Secure Archiving

2.1 Capture and store documents

Documents are first captured and placed in a digital tray (Inbox) where they are prepared for storing in the file cabinet.

- Drag and drop files of any format into your *DW - Inbox*, click the *Import* button directly from within the tray to select the documents from your file directory or scan paper documents.
- Select a document in the tray and click on the *Store* button. This opens several store dialogs to choose from for indexing documents and storing them in the *DW - Documents* file cabinet:
 - **For all:** Share the document directly when you store it. After storing, all users have read and edit access to the document in the file cabinet. You alone are the owner (page 31) of the document, so you can also change the permissions on the document (page 29).
 - **For some:** This store dialog allows you to assign specific users read access, edit access, or even grant owner rights to the document.
 - **For me:** This store dialog is for private documents. Only you and the administrator (page 4) of your organization can access the stored document. If you want to share it with other users later, you can change the permissions on the document (page 29).



- Select the appropriate store dialog and index the document to quickly find it later in the file cabinet:

- **Documents type is a mandatory index field.** This ensures consistent indexing, using a predefined select list. Click on the down arrow to the right of the index field and select the appropriate entry. For many document types there are additional subtypes to choose from. If a suitable document type or subtype is not on the list, additional types can be easily added to the select list. (page 13)
- **Add further index information.** Simply type in the field directly or transfer data from the document using One Click Indexing.
- **Specify an Action Date in the index field if desired:** This provides a notification for the list *DW - Documents - Require Action Within 30 Days* as an alert that your attention is needed on the document (page 16).

- After all the appropriate index fields are complete, click the *Store* button. The document is now securely stored in your *DW - Documents* file cabinet.

Tip: Activate Intelligent Indexing to automatically index documents. Intelligent Indexing reads documents as soon as they arrive in the tray and enters appropriate values in the store dialog. Learn more (page 18)

2.2 Document types and retention periods

All documents of any type and format are welcome in DocuWare.

Each document is indexed at a minimum with the document Type (i.e. *Agreement, Contract, Invoice, Letter, etc.*) and optionally with a corresponding subtype (i.e. *Consulting, Employment, Received, Sent, etc.*) when stored in a file cabinet (page 10).

To ensure consistency, document types and subtypes are entered during storing using the predefined select list. This list contains the following entries by default:

Document Type	Subtype	Retention in years
---------------	---------	--------------------

Agreement	Non-Disclosure	7
	Consulting	7
	Subcontractor	7
	Maintenance	7
	Other	7
Contract	Telephone	7
	Licensing	7
	Insurance	7
	Financial	7
	Partnership	7
	Employment	7
	Other	7
Invoice	Customer	7
	Vendor	7
Lease	Building and Property	7
	Vehicle	7
	Machinery and Equipment	7
	Other	7
Letter	Sent	7
	Received	7
Packing Slip	Customer	7
	Vendor	7
Proposal	Customer	7
	Vendor	7

Purchase Order	Customer	7
	Vendor	7
Statement	Bank Account	7
	Credit Card	7
Travel Expense	Receipt	7
	Expense Report	7

A default retention period of 7 years is set for each document type/subtype. You can [modify the retention period](#) (page 15) in just a few steps, if you want to store a document type/subtype in DocuWare for longer or shorter periods. Also, the [select list can be modified and expanded](#) (page 13) as required.

2.3 Manage document type select lists

A predefined select list is available for indexing document types and subtypes. You can easily add new records as needed. You will require the [user role](#) (page 4) *DW - Administrator*.

Here's how:

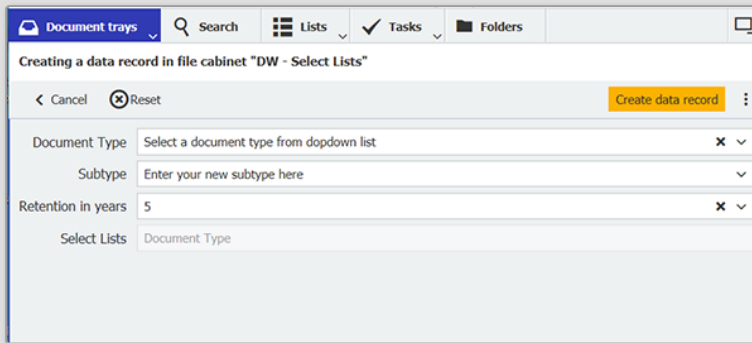
Add new document types

- In your DocuWare Client, go to a document tray, click on an empty area in the tray and select the *Create data record* button.
- Click on *DW - Select Lists - Document Type*.
- Enter your new document type in the *Document Type* field.
- Enter your new subtype in the *Subtype* field.
- Enter retention in years; Note: If the retention period is left blank, the document will have a default retention of 7 years.
- Click *Create data record* to save the new record. This new document type/subtype will now appear in the select list.

Add new subtypes

- Open the store dialog *DW - Select Lists - Document Type* via *Create data record* as described above.
- Select a document type from the dropdown list.
- Enter your new subtype in the *Subtype* field.

- Enter retention in years; **Note:** If the retention period is left blank, the document will have a default retention of 7 years.

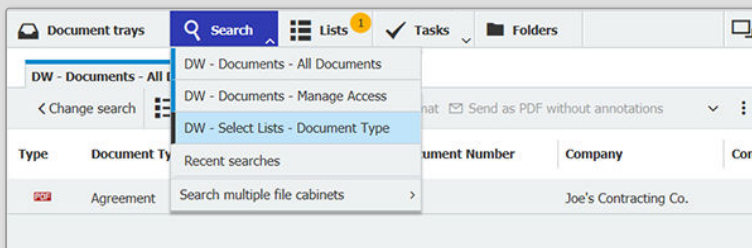


- Click *Create data record* button to save the new record. This new subtype will now appear in the select list.

Rename existing document types and/or subtypes

If you need to use names other than the predefined list for document types or subtypes, you can modify the select list:

- In your DocuWare Client, click on the *Search* area.
- Select the *DW - Select Lists - Document Type* search dialog.



- Enter the document type and/or subtype you want to change and click the yellow *Search* button.
- Select the Document type and/or Subtype to change and double click on the selected line.

- Enter your change in the appropriate field. **Note:** If the retention period is left blank, the document will have a default retention of 7 years.

Type	Document Type	Subtype	Retention in years
	Agreement	Non Disclo	
	Agreement	Consulting	
	Agreement	Subcontrac	
	Agreement	Maintenan	
	Agreement	Other	

Document Type: Agreement

Sub Type: Consulting

Retention in years: 7

Select Lists: Document Type

Save

- Click the Save button to update the list.

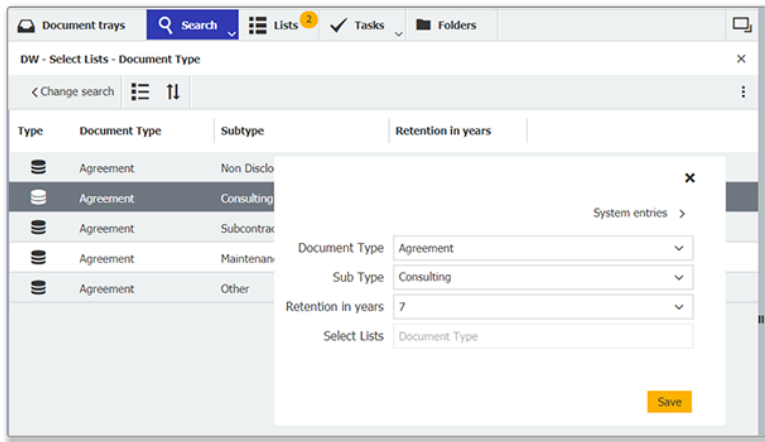
2.4 Modify retention period

The default retention period of 7 years is set for each document type and subtype. As administrator you can simply modify the retention period based on your business rules in a few steps.

Here's how:

- In your DocuWare Client, click on the *Search* area and select *DW - Select Lists - Document Type*.
- Enter the document type and/or subtype you want to change and click the yellow *Search* button.
- Select the document type and/or subtype to change and double click on the selected line.

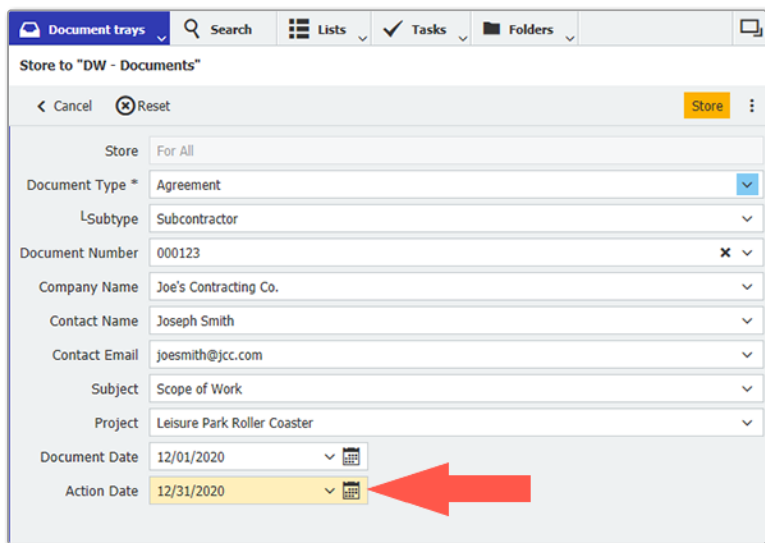
- Enter the number of years in the *Retention in year* field. **Note:** If the retention period is left blank, the document will have a default retention of 7 years.



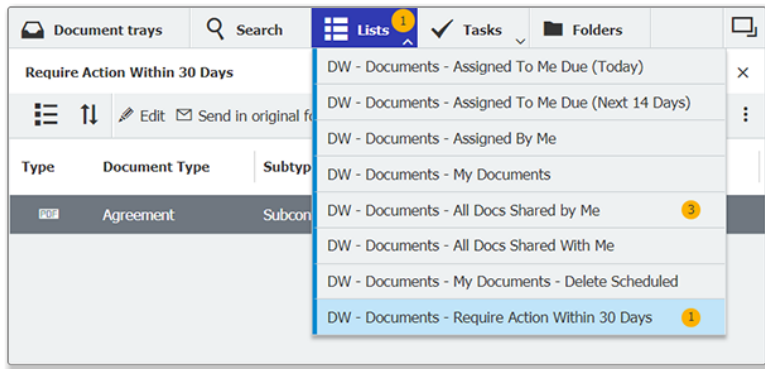
- Click the Save button to update the list.

2.5 Utilizing document action date

Never miss a due date again. When storing documents (page 10), you can enter an *Action Date* in each of the *DW - Documents* store dialogs. This *Action Date* field will generate a notification in a list for you when documents require your attention.



The 30 days before the specified action date, the document appears under the *Lists* tab in the *DW - Documents - Require Action Within 30 Days* list for any user who has been granted permission to the document.

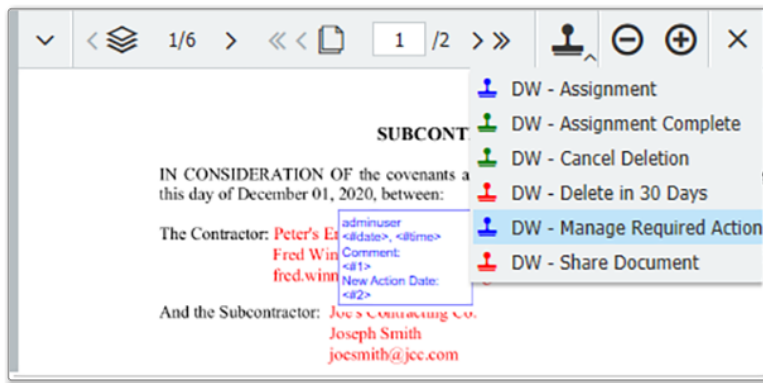


If required, you can also display and use additional notification lists for required action within 60 days, 90 days and/or for documents past their action date. [Read more](#) (page 16)

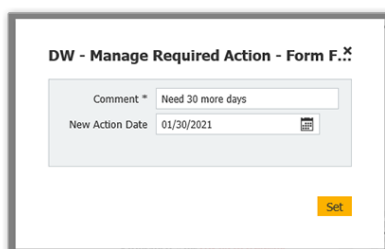
Manage action required documents

Any of the stored documents appearing in your required action list can be managed with the *DW - Manage Required Action* stamp (having edit or owner permissions):

- Open the document in the list by double-clicking it in the viewer.
- Open the drop-down list at the stamp icon in the viewer's header bar and click on the *DW - Manage Required Action* stamp.



- When the required action is completed or resolved enter a comment only in the stamp and it will be removed from the required action list for you and anyone granted access to the document or if additional time is needed to complete the required action, just set a new action date.



2.6 Activate Intelligent Indexing

Use DocuWare [Intelligent Indexing](#) to automate the indexing of the most important data from your documents and eliminate manual data entry.

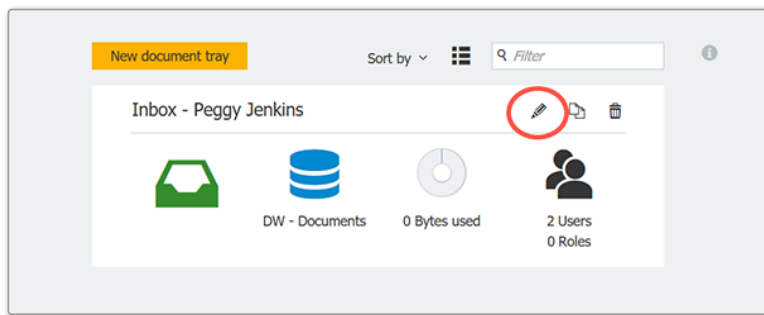
This web-based service identifies the key information from your documents as soon as they are brought into a document tray and recommends index values. When a selected store dialog is activated for Intelligent Indexing and the system is familiar with a document type, a suggested indexing is automatically and reliably assigned. Just review the index fields to confirm, add, or correct any information.

Intelligent Indexing automatically learns from each entry and after a brief period of indexing quality increases with each document stored. For example: an invoice from the same vendor.

Only one store dialog can be associated with each document tray for Intelligent Indexing. Any store dialog from the document tray can be used, but only one has Intelligent Indexing associated with it. This configuration can be activated in just a few steps (you need the user role *DW - Administrator*).

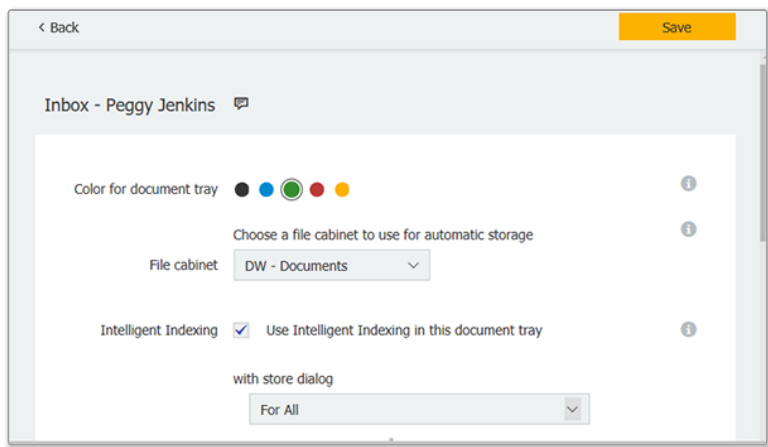
Here's how:

- In your DocuWare Client open *Configurations* via the main menu (click on your username) and go to *Document Trays* under the *Personal* tab.
- Click on the editing pen at the tray that should be used with Intelligent Indexing.



- Select *Use Intelligent Indexing* in this document tray.

- From the drop-down list, select the store dialog that Intelligent Indexing should automatically populate. For example: the store dialog you use the most.

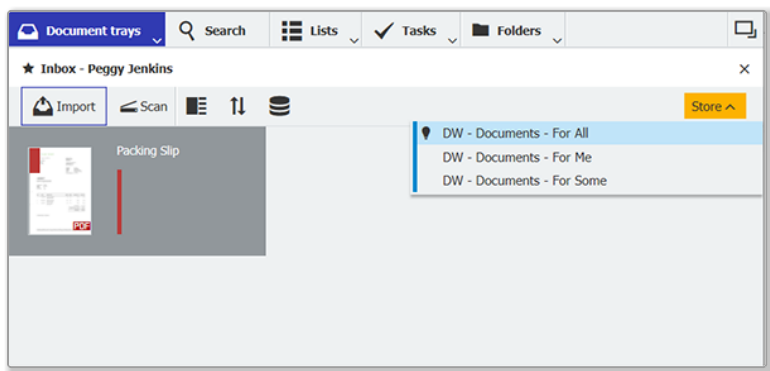


- Save your configuration.

As soon as new documents are in your document tray Intelligent Indexing automatically identifies them, and depending on the indexing quality, marks them in red, yellow, or green.

- Green: Intelligent Indexing is reliable for the index fields
- Yellow: Intelligent Indexing is not accurate on all the index field
- Red: Intelligent Indexing is unreliable for the index fields

You can easily recognize the store dialog that is activated for Intelligent Indexing by the small light bulb.



You can find more information on how to use this machine learning technology [here](#).

2.7 Setting or cancelling deletion stamp

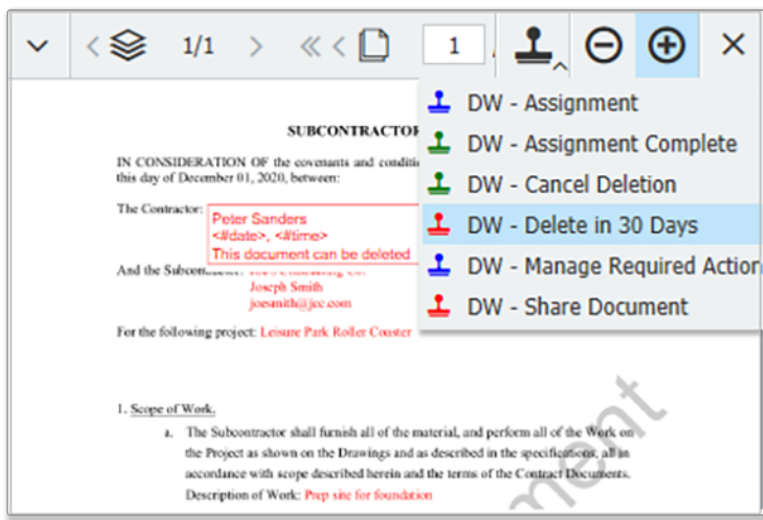
Stamp a deletion flag on the document so that it is automatically deleted 30 days later. There is a stamp also available to remove the deletion flag. A password request provides additional security for this application.

Here's how:

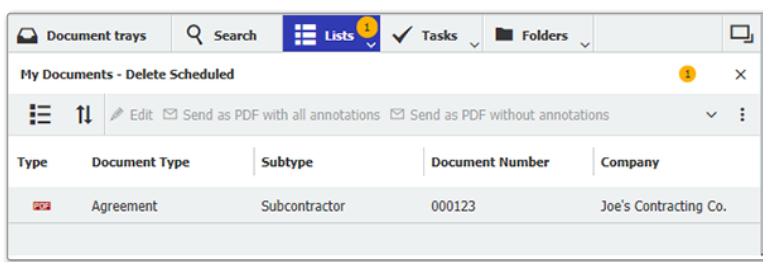
To set a deletion stamp on a document, users need at least *Edit* permission on this document. The deletion stamp removes the document from the access of all users except its owner, who can remove the deletion schedule.

Set deletion schedule by stamp

- Access a stored document via *searches, lists or folders* and double click on the document to open it in the viewer.
- Click on the Stamp icon and the select the stamp *DW - Delete in 30 days*.



- Place the stamp on the document and enter your password.
- The document is displayed in the *DW - documents - My documents - Delete Scheduled* list of its owner (visible by actively opening the list or at the latest after the next login to DocuWare Client).



- All other users lose their access rights to this document. This means it disappears from all other lists, folders and searches.
- The owner has 30 days to cancel the deletion (see below).
- Without further action, the document is automatically and irrevocably deleted from the file cabinet 30 days later.

Cancel deletion

Owners of a document can cancel the deletion within 30 days.

- Open the document in the list *DW - documents - My documents - Delete Scheduled* by double-clicking in the viewer and select the stamp *DW - Cancel Deletion*.
- Place the stamp on the document and enter your password.
- The document automatically disappears from the owner's deletion schedule list and is displayed again in the relevant lists, folders and searches by all users with permissions to the document.

3 Access Documents

3.1 Access related documents

Use the *Related Documents* function to quickly and easily access all documents that are connected to a document currently being viewed. For example, find all documents with the same *Company Name*, *Contact Name* or *Document Number*.

Related documents are determined based on criteria used in indexing or system field entries of the document. When the criteria match, a connection between the documents is established automatically. So, you can quickly find them.

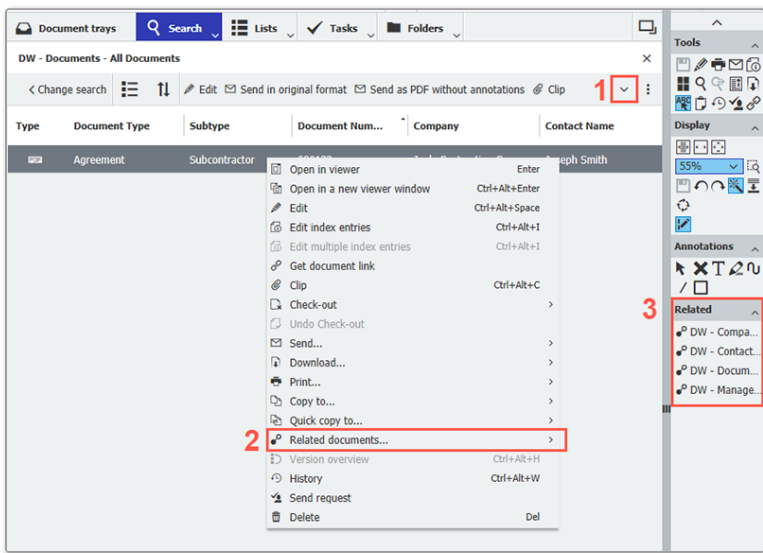
Example:

You have accessed a vendor’s agreement in DocuWare. Using the *Related Documents* function, you can now retrieve all other documents you have stored for this company in one click without having to start a new search.

Here’s how:

Related documents can be accessed in 3 ways:

1. The *Related documents* in the toolbar of the result list (if *Related documents* is not visible, click on the down arrow next to the three dots and select the function from the drop down select list)
2. Selecting the *Related documents* by right click context menu while in a result list
3. In the document viewer toolbar under *Related*



Click on the desired document relationship and the linked documents are immediately listed in a new results list, including the document to which the relationship was opened:

Type	Document Type	Subtype	Document Num...	Company	Contact Name
	Purchase Order	Vendor	000123	Joe's Contracting Co.	Joseph Smith
	Proposal	Vendor	000123	Joe's Contracting Co.	Joseph Smith
	Letter	Received	000123	Joe's Contracting Co.	Joseph Smith
	Invoice	Vendor	000123	Joe's Contracting Co.	Joseph Smith
	Agreement	Subcontractor	000123	Joe's Contracting Co.	Joseph Smith

You can also use the *Related Documents* function to identify the owner of a document (page 31) or, if you are the owner yourself, to easily view and manage access (page 29) to a document.

3.2 Activate and deactivate lists

For quick access to specific documents, your DocuWare Client provides various lists that update automatically. You will also be notified of documents that have a required action date (page 16) or that are stamped for assignment (page 27). Furthermore, saved searches are shown within the lists.

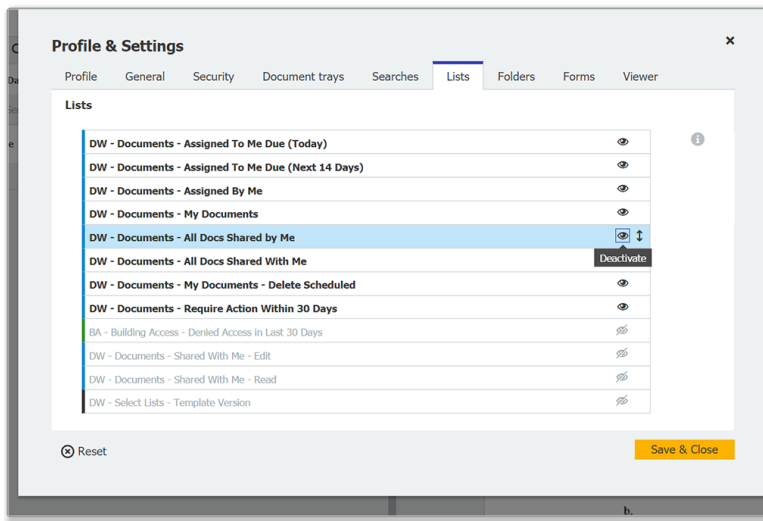
Type	Document Type	Subtype
	Agreement	Subcon

- DW - Documents - Assigned To Me Due (Today)
- DW - Documents - Assigned To Me Due (Next 14 Days)
- DW - Documents - Assigned By Me
- DW - Documents - My Documents
- DW - Documents - All Docs Shared by Me
- DW - Documents - All Docs Shared With Me
- DW - Documents - My Documents - Delete Scheduled
- DW - Documents - Require Action Within 30 Days

Any lists that you do not need can be deactivated within your DocuWare settings. Depending on your user role there can be also other, still hidden lists that you could display in the same way.

Here's how:

- Open the main menu in your DocuWare Client (click on your user name), select *Profile & Settings* and go to the *Lists* tab.



- Deactivate a list by clicking on the black eye.
- Activate hidden lists by clicking on the crossed-out eye.
- *Save & Close* your changes.

4 Collaboration

4.1 Send requests and receive tasks

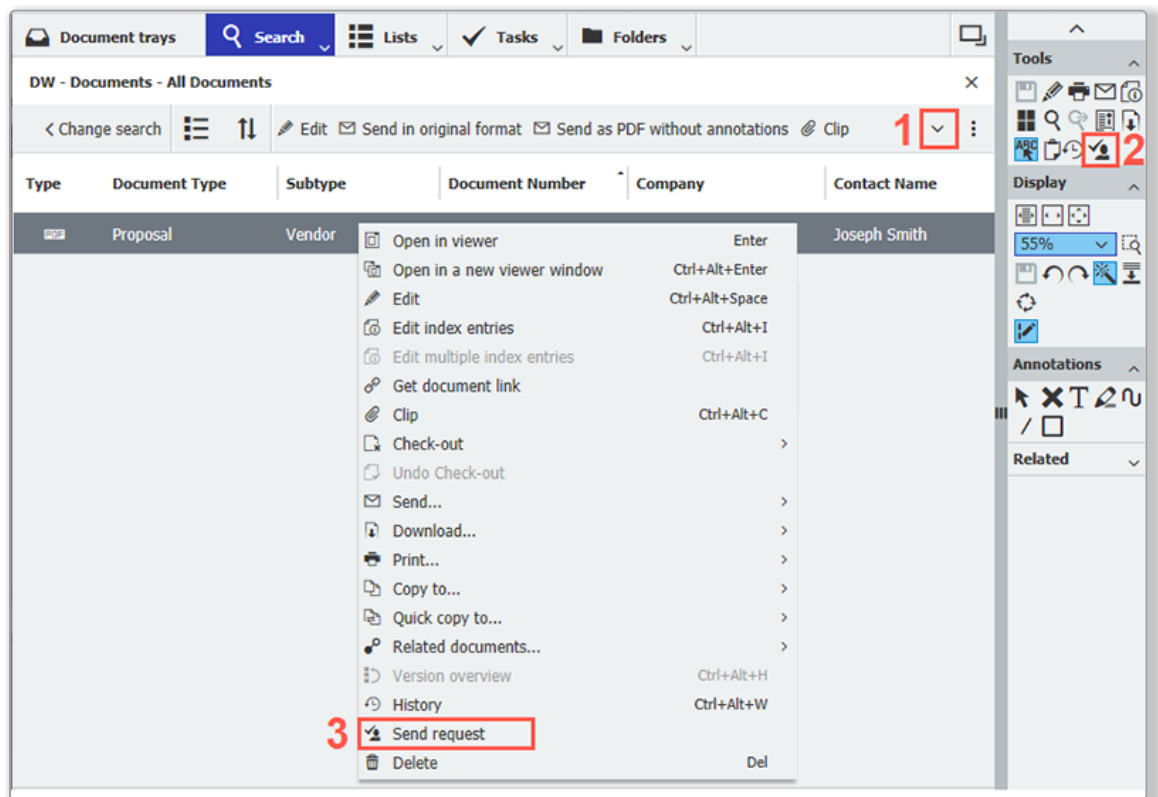
The *Send request* function allows you to easily assign tasks to users who have permissions (page 29) on a document. You can also use the function to request additional permissions from the owner (page 31) of a document. All with fast, transparent approval workflows to keep you on track.

Example:

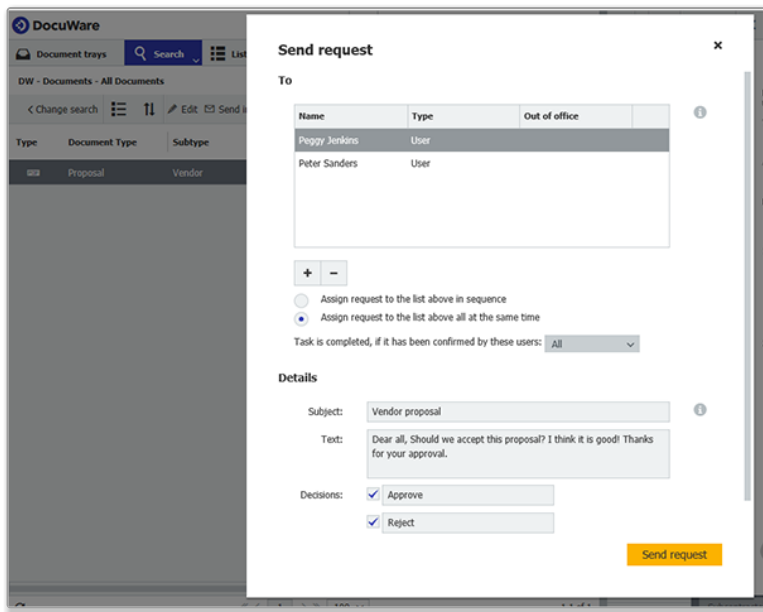
You have received a vendor proposal and stored the document with user permissions in the file cabinet. Now you would like to obtain approval from your colleague(s) to accept the proposal.

Here's how:

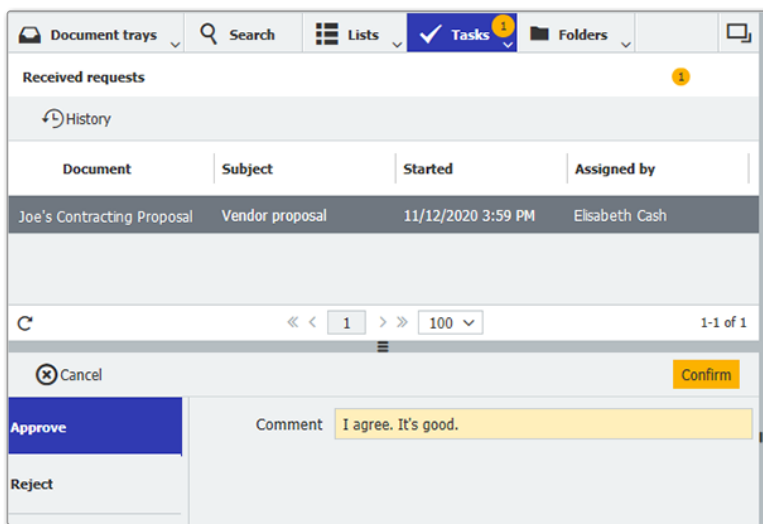
- Access a stored document via *searches, lists or folders*.
- *Send Request* function can be accessed using one of the following 3 ways:
 1. In the toolbar of the result list (if *Send request* is not visible, click on the down arrow next to the three dots and select the function from the drop down select list)
 2. In the viewer toolbar under *Tools*
 3. In the context menu of a document while in the result list



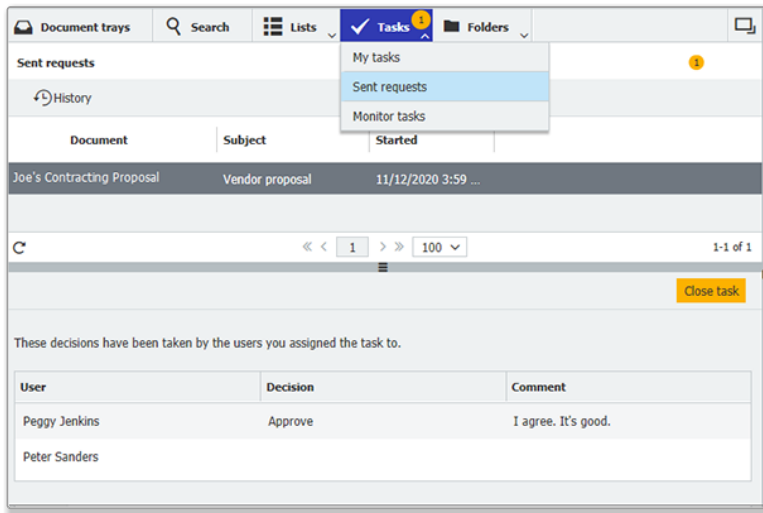
- The *Send request* dialog box opens. Click on the *Plus* sign and select one or more colleagues who should receive your request; decide whether it should be assigned to the users in sequence or at the same time. You can also specify whether the request is completed if it has been confirmed by all or any one of the selected users.
- Define the details of your request: Enter a subject and text and specify one or two decision options (pre-filled fields can be overwritten).
- Click on *Send request* button.



- The selected colleagues immediately receive the sent request in the *Tasks* area of their DocuWare Client, in addition an automatic e-mail notification that contains a link to the document and task.
- By clicking on the document, the decision options appear (a double-click also opens the document in the viewer): make your decision, optionally add a comment, and click the *Confirm* button.



- As requestor, you can view the status of the request in the *Tasks* area of your DocuWare Client under *Sent requests*.



- When all decisions have been made, an additional e-mail notification informs you the request is completed. Click on the *Close task* button to remove it from your sent request list in the *Tasks* area.

4.2 Assign documents with stamp

The assignment stamp function allows you to easily assign a document to any user(s) and set a due date as to when the action item is needed to be completed by. The access rights to the document provided with this stamp are only temporary until the assignment has been completed by the user(s).

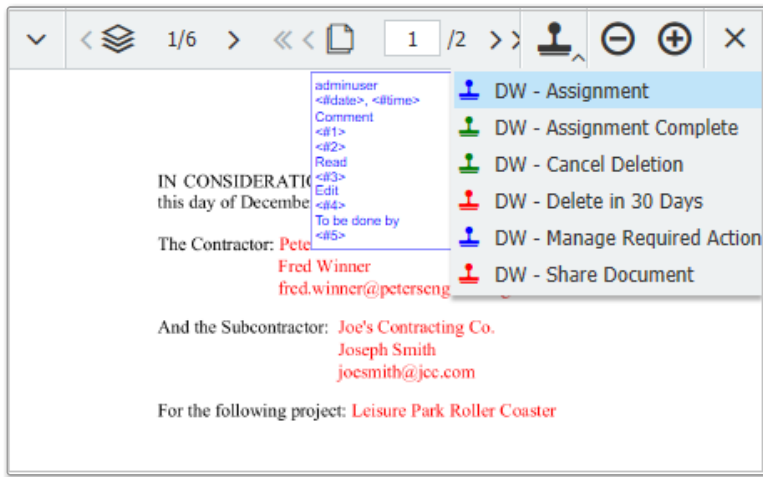
Example:

You have received an agreement and stored it in the file cabinet. Now you would like to assign the agreement to colleagues to review. You provided *Read* permissions to one colleague and *Edit* permissions to another colleague, and it must be done by both to complete the assignment.

Here's how:

- Access a stored document via searches, lists or folders.
- Double click on the document to open it in the viewer.

- Click on the Stamp icon and select the stamp *DW- Assignment* from the drop-down list.



- Enter your comment in the *Comment* field.
- Enter the *Follow up before* date.
- Select user(s) to assign the document to and their permission levels. If the selected user(s) are granted additional permissions than the permission granted in storing or sharing process, the assignment rights are temporary and will be removed once the assignment is completed. Users will be informed by e-mail about their new permission to the document.
- Enter *To be done by* to determine who should respond. If selecting multiple users, determine whether everyone must respond or any of the selected users would be acceptable to complete the assignment.

- Click on *Set* and place the stamp on the document.

- The document will be displayed 14 days before the pending date in the list *DW - Documents - Assigned To Me Due (Next 14 Days)* of all users you have selected.
- The document will be displayed on the pending date in the list *DW - Documents - Assigned To Me Due (Today)* of all users you have selected.

Complete the assignment

Once the assignment is completed, one or all selected users confirm this.

- Open the document in one of the assignment lists by double-clicking in the viewer.
- Select the stamp *DW - Assignment complete*, optionally enter a comment and set the stamp on the document.
- The originator receives an email confirmation of the completed assignment. This now removes the document from the assigned lists.

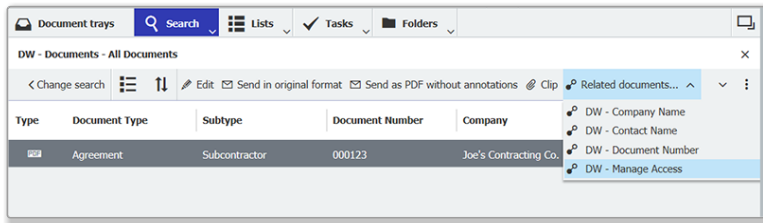
4.3 View and manage permissions

The owner of a document can view or change the permissions for *Read*, *Edit*, or *Owner* by using the *Related documents* function. There are two possible ways:

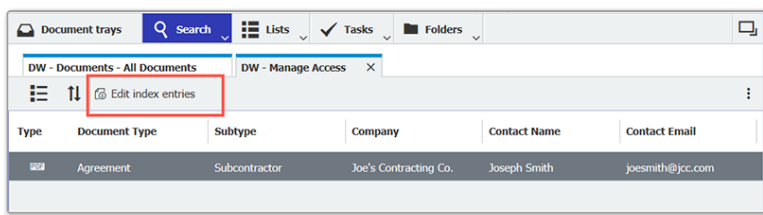
By related documents

- Select a document and click on *Related documents* by using one of the 3 methods below:

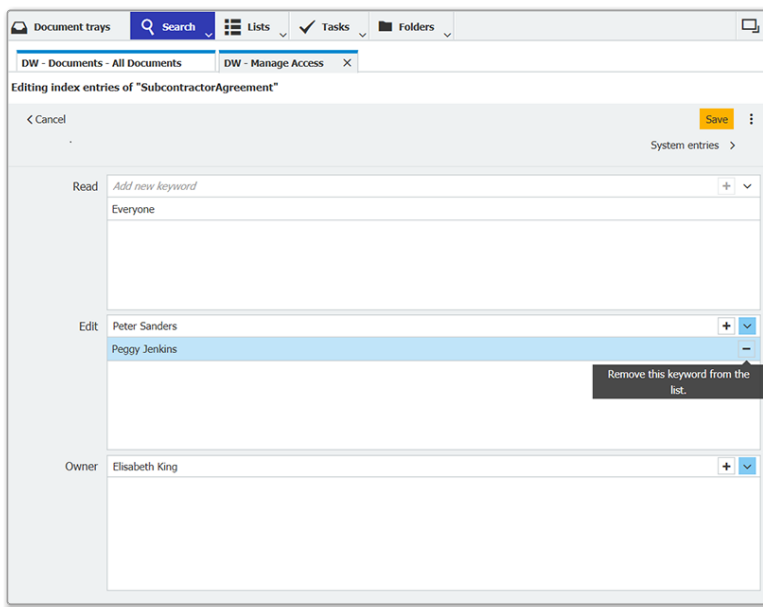
1. The toolbar of the result list (see image below)
 2. Selecting the *Related documents* by right click context menu while in a result list
 3. In the viewer toolbar under *Related*
- Select *DW - Manage Access* (only visible if you are owner of the document).



- This opens the *DW - Manage Access* tab, then click on *Edit index entries*.



- View or edit the permissions for *Read*, *Edit*, and *Owner*. To add additional user permissions to read, edit, or owner, select the username from the drop-down menu and click on the *Plus* sign. To remove permissions from a user, click on their name, then click the *Minus* sign.



- Save your changes.

By search dialog

Another way to view and, if necessary, edit permissions on a document is to use the *DW - Documents - Manage Access* search dialog:

- Click on *Search* and select *DW - Documents - Manage Access*.
- Search for the desired document(s).
- Select a document in the result list and click on *Edit Index Entries* in the toolbar of the result list.
- You can now view all permissions that are assigned to this document. If you are an owner, you can edit the permissions as described above. If you are assigned *Read* permissions, and now need *Edit* permissions, you can request them from the owner via Send request (page 25) .

4.4 Identify owner of a document

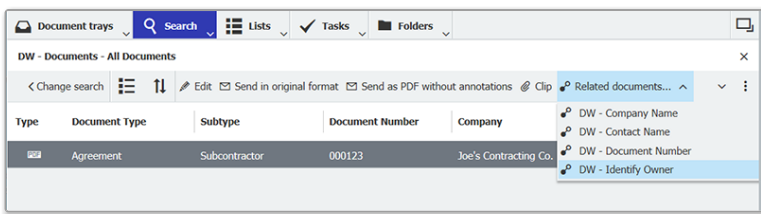
When permissions are granted for *Read* or *Edit* you can use the Related Documents (page 22) function to quickly and easily determine the owner of the document.

Example:

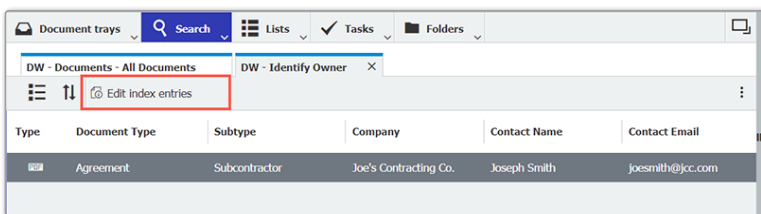
You have opened a document with *Read* permissions and need to see which user(s) have owner permissions to this document, for example to request *Edit* permissions. Using the *Related documents* function, the owner can be easily determined.

Here's how:

- Select a document and click on *Related documents* by using one of the 3 methods:
 1. The toolbar of the result list (see image below)
 2. Selecting the Related documents by right click context menu while in a result list
 3. In the viewer toolbar under Related
- Select *DW - Identify Owner* (only visible if you are not the owner of the document).



- This opens the *DW - Identify Owner* tab, then click on *Edit index entries*.



- This will display the name(s) of the owner(s).

Using the Send request (page 25) function, you could now request editing rights from the owner, if you only have reading access to the document.