



Below is a beginner's guide to DocuWare.

If you have any further questions, please do get InTouch with the DocTech Team

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What is DocuWare?

DocuWare is a cloud-based document management and workflow automation platform that helps businesses digitise, store, organise and automate document processes. It enables organisations to move away from paper files, manual approvals and disconnected systems by creating a central, secure location for business information.

What are DocuWare Trays?

DocuWare Trays are digital inboxes where documents are collected before they are filed. Think of them as a temporary holding area where users can review, edit or categorise documents before storing them in a cabinet.

Documents can arrive in trays from scanners, emails, uploads or automated imports from other business systems.

What are DocuWare Cabinets?

Cabinets are secure digital filing systems within DocuWare. They store documents in a structured way and use indexing information, such as invoice numbers, customer names or dates, to make documents easy to find.

Cabinets replace physical filing cabinets and provide controlled access based on user permissions.

How does DocuWare searching work?

DocuWare uses indexed data and full-text search capabilities to find documents quickly. Users can search by:

- Customer name
- Invoice number
- Purchase order number
- Date ranges
- Keywords contained within the document itself

This means documents can usually be located in seconds, even within large archives containing millions of files.

What are DocuWare Store Dialogues?

A DocuWare Store Dialogue is the screen that appears when a document is being stored in a file cabinet. It allows users to enter, review or amend the document's index data – such as invoice numbers, customer names, dates or reference numbers – before the document is archived.

Store Dialogues play an important role in ensuring documents are classified correctly and can be found quickly later. They can also be configured with:

- Mandatory fields to ensure important information is captured
- Predefined values to speed up indexing
- Validation rules to improve data quality
- Custom field labels for different departments
- Intelligent Indexing, which can automatically suggest index values based on the document's content

By controlling how information is captured at the point of storage, Store Dialogues help businesses maintain accurate, searchable and well-structured document archives.

What are DocuWare Task Lists used for?

Task Lists provide users with a list of actions that require attention. They are commonly used for:

- Invoice approvals
- Purchase order processing
- Contract reviews
- HR onboarding tasks
- Compliance activities

Task Lists ensure work is completed efficiently and nothing is overlooked.

What are DocuWare Workflows used for?

DocuWare Workflows automate repetitive business processes by routing documents and triggering actions based on predefined rules.

Common workflow examples include:

- Invoice approvals
- New starter onboarding
- Purchase requisitions
- Contract reviews
- Customer onboarding
- Holiday request approvals

Workflow automation reduces manual effort, speeds up processes and improves visibility.

Can you do multiple cabinet searches in DocuWare?

Yes. DocuWare allows users to search across multiple cabinets simultaneously. This is particularly useful when information is stored across different departments or document types.

Users can quickly retrieve all related documents without needing to search each cabinet individually.

What does DocuWare usually replace?

DocuWare commonly replaces:

- Paper filing systems
- Shared network drives
- Manual approval processes
- Email-based document storage
- Legacy document management systems
- Spreadsheet-driven processes

Many organisations implement DocuWare to improve efficiency, reduce costs and support digital transformation initiatives.

Can DocuWare integrate with other systems in my business?

Yes. DocuWare integrates with a wide range of business applications, including:

- ERP systems
- Accounting software
- CRM platforms
- Microsoft 365
- Outlook
- SAP
- Microsoft Dynamics

- Sage
- Business Central

Integrations help create seamless processes by automatically sharing information between systems.

How do DocuWare licences work?

DocuWare licensing is typically based on named users and the functionality required. Businesses can choose different user types depending on how employees need to interact with the system.

Licensing can be tailored to suit organisations of all sizes, from small businesses to large enterprises.

Is DocuWare cloud-based?

Yes. DocuWare is available as a secure cloud platform, allowing users to access documents and workflows from anywhere with an internet connection. It is also available as an on-premise solution for organisations with specific infrastructure requirements.

Is DocuWare secure?

Yes. DocuWare includes robust security features such as:

- User permissions
- Role-based access
- Encryption
- Audit trails
- Version control
- Secure backups

These features help businesses maintain compliance and protect sensitive information.

Can DocuWare help with invoice processing?

Absolutely. Invoice processing is one of the most common uses of DocuWare. The platform can capture invoices, extract information automatically, route approvals and archive documents securely.

This significantly reduces processing times and eliminates manual data entry.

Can remote employees use DocuWare?

Yes. Because DocuWare is accessible through a web browser and mobile devices, employees can securely access documents and workflows from any location.

This makes it an ideal solution for hybrid and remote working environments.

How long does a DocuWare implementation take?

Implementation times vary depending on the complexity of the project. Simple solutions can often be deployed within a few weeks, while larger projects involving integrations and multiple workflows may take longer.

An experienced implementation partner can help define timescales and ensure a successful deployment.

Is DocuWare suitable for small businesses?

Yes. DocuWare is highly scalable and can support businesses of all sizes. Many small and medium-sized organisations implement DocuWare to improve efficiency, reduce paper dependency and prepare for future growth.

Why do businesses choose DocuWare?

Businesses choose DocuWare because it helps them:

- Reduce paper and storage costs
- Improve productivity
- Automate repetitive processes
- Increase visibility and control

- Support compliance requirements
- Enable remote working
- Improve customer service
- Create more efficient digital processes

What is DocuWare? A Beginner's Guide to Document Management and Workflow Automation

If you've started researching document management software, you've probably come across DocuWare. But what exactly is it, and why are so many organisations adopting it?

In simple terms, DocuWare helps businesses digitise documents, automate processes and create a single source of truth for information across the organisation.

What Does DocuWare Do?

DocuWare is a document management and workflow automation platform that captures, stores and manages business documents electronically.

Instead of relying on paper files, shared drives or manual processes, businesses can securely store documents in one central system and automate repetitive tasks such as approvals, data entry and document routing.

Typical documents managed in DocuWare include:

- Invoices
- Purchase orders
- Contracts
- HR records
- Customer documents
- Delivery notes

- Compliance documentation

Why Businesses Are Moving Away from Paper

Many organisations still rely on paper processes and shared network folders. While these methods may have worked in the past, they often create challenges such as:

- Lost documents
- Slow approval processes
- Duplicate information
- Security concerns
- Lack of visibility
- Difficult remote access

DocuWare addresses these challenges by creating secure digital processes that are easier to manage and significantly more efficient.

How Does DocuWare Work?

The platform follows a straightforward process:

1. Capture Documents

Documents can be imported from scanners, emails, folders, mobile devices or integrated business systems.

2. Store Information Securely

Documents are stored in digital cabinets with indexing information that makes retrieval simple.

3. Search and Retrieve

Powerful search capabilities allow users to locate documents in seconds using keywords, dates, invoice numbers or customer names.

4. Automate Processes

Workflows automatically route documents to the right people and trigger tasks without manual intervention.

What Processes Can DocuWare Automate?

One of DocuWare's biggest strengths is workflow automation.

Businesses commonly use DocuWare for:

- Invoice processing and approvals
- Employee onboarding
- Contract management
- Purchase requisitions
- Customer onboarding
- Compliance processes
- Expense management

Automation removes bottlenecks and gives organisations complete visibility of their processes.

Can DocuWare Integrate with Existing Systems?

Yes. One of the reasons businesses choose DocuWare is its ability to integrate with existing software.

Integrations are available with many popular platforms, including:

- Microsoft 365
- Microsoft Dynamics
- SAP
- Sage
- ERP systems
- CRM platforms
- Accounting software

This allows businesses to improve processes without replacing their existing technology.

Is DocuWare Suitable for Small Businesses?

Absolutely.

Although many larger organisations use DocuWare, it is equally suitable for small and medium-sized businesses looking to:

- Reduce paper dependency
- Improve efficiency
- Enable remote working
- Increase control over business information
- Support future growth

Because the platform is scalable, organisations can start with a single process and expand over time.

What Are the Benefits of DocuWare?

Businesses typically implement DocuWare to achieve:

Faster Processes

Automated workflows dramatically reduce approval times and eliminate unnecessary manual tasks.

Better Visibility

Managers can see exactly where documents are within a process and identify bottlenecks quickly.

Improved Compliance

Audit trails, security permissions and document retention capabilities help support regulatory requirements.

Greater Productivity

Employees spend less time searching for information and more time focusing on valuable work.

Reduced Costs

Lower printing, storage and administration costs deliver measurable savings.

Is DocuWare Right for Your Business?

If your organisation is still relying on paper files, shared drives or manual approval processes, document management and workflow automation could deliver significant benefits.

DocuWare provides a flexible platform that helps businesses:

- Digitise information
- Improve efficiency
- Automate repetitive tasks
- Support hybrid working
- Create scalable, future-ready processes

Whether you're looking to automate invoice processing, improve document control or begin your digital transformation journey, DocuWare offers a practical and proven solution that can grow alongside your business