



College of Medicine

## Operations Manual

### **Desk Procedure – Extracting DocuWare Results List to Excel Spreadsheet**

**Process:** DocuWare Results List to Excel Spreadsheet

**Date:** 9/20/12

**Process Owner:** COM-IT Records Management

**Purpose:** To provide the steps required to export a DocuWare Results List to an Excel Spreadsheet.

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### **Definitions and Responsibilities**

#### **Tools and Resources:**

DocuWare

Microsoft Excel

#### **Overview:**

It's possible to search for a specific set of information in DocuWare and extract the Results List, which shows all index data of the specified documents, to an Excel file. Exporting this information directly into an Excel spreadsheet will allow you to share this information with others or keep in your electronic files for reference.

## Process

1. Double-click on your file cabinet to open the Search dialog.
2. Enter search criteria and click

Search dialog "Standard Search Dialog" - RECORDS MGMT

Fields | Settings | Sorting

Sorting       AND       OR (#)

Extended Search

Document Name

COM Unit

Document Type      PROCEDURE

Fulltext

Storage date:

Reset      OK      Cancel      Help

OK

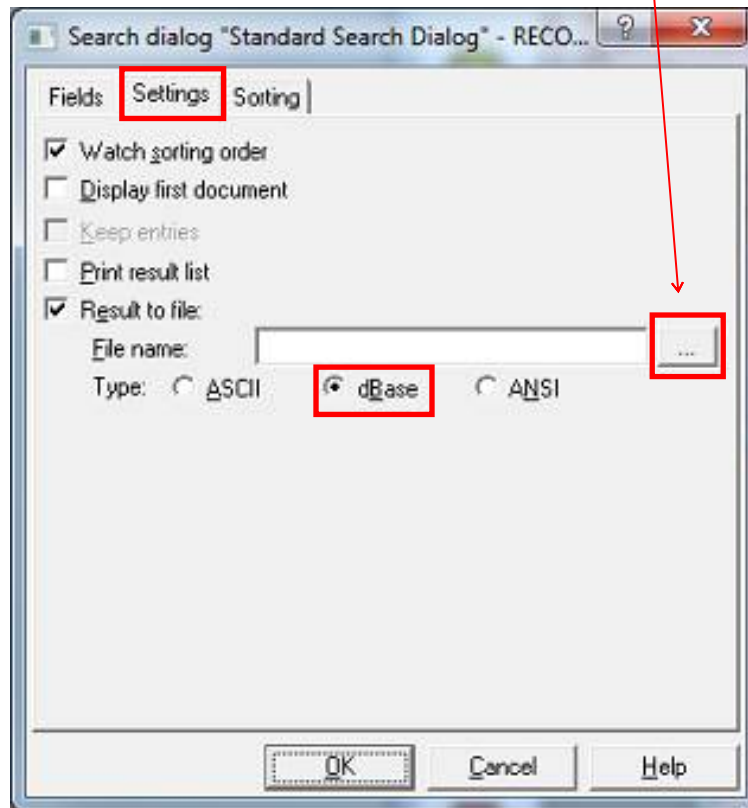
3. The Results List will display all matching documents

Result list - "Standard Search Dialog" - RECORDS MGMT - 19 Hit(s)

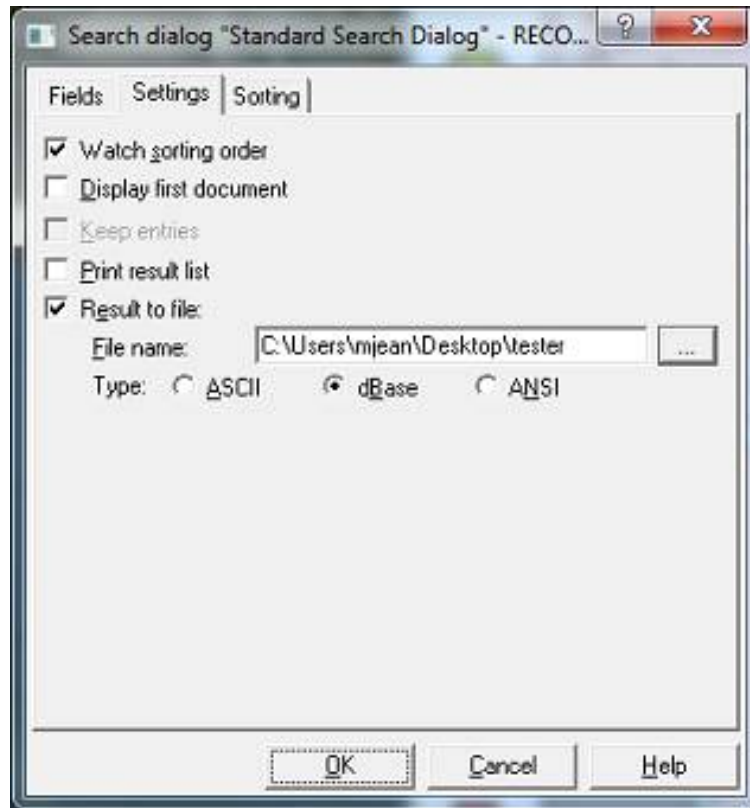
Document Name	COM Unit	Document Type	Store Date
CABINET PROFILE FILTERS	RM	PROCEDURE	08/29/2012
FILTER ACCESS RIGHTS DEMO INSTRUCTIONS	RM	PROCEDURE	08/17/2012
FILTERED ACCESS RIGHTS DOCUMENTATION FROM DW	RM	PROCEDURE	08/16/2012
ADVANCED ACTIVE IMPORT SETTINGS	RM	PROCEDURE	06/19/2012
USING DW WEB CLIENT TO EMAIL PDF ATTACHMENTS	RM	PROCEDURE	06/12/2012
SCANNING WITH CANON MFD	FINANCE	PROCEDURE	04/04/2012
INDEXING FINANCE DOCUMENTS	FINANCE	PROCEDURE	04/04/2012
MFD AND DOCUWARE BASKET ISSUE	RM	PROCEDURE	04/04/2012
ADDING NEW FILE CABINETS	RM	PROCEDURE	03/16/2012
DW EMAIL FILE FORMAT CORRECTION	RM	PROCEDURE	03/12/2012
APPENDS AND NATIVE FORMAT STORAGE	RM	PROCEDURE	03/08/2012
MFD TEMPLATE CREATION	RM	PROCEDURE	03/07/2012
SCANNING WITH MFD	RM	PROCEDURE	02/23/2012
CALCULATING STORAGE SPACE	RM	PROCEDURE	02/17/2012
EXTRACTING RESULTS LIST REPORTS	RM	PROCEDURE	02/17/2012
BARCODE STUDIO DRAFT	RM	PROCEDURE	02/01/2012
DOCUWARE INSTALLATION ON WINDOWS CLIENT	RM	PROCEDURE	01/24/2012
TIFFING DOCUMENTS INTO DOCUWARE	RM	PROCEDURE	
COM DW WEB CLIENT ADDRESS	RM	PROCEDURE	

Settings      Help      End

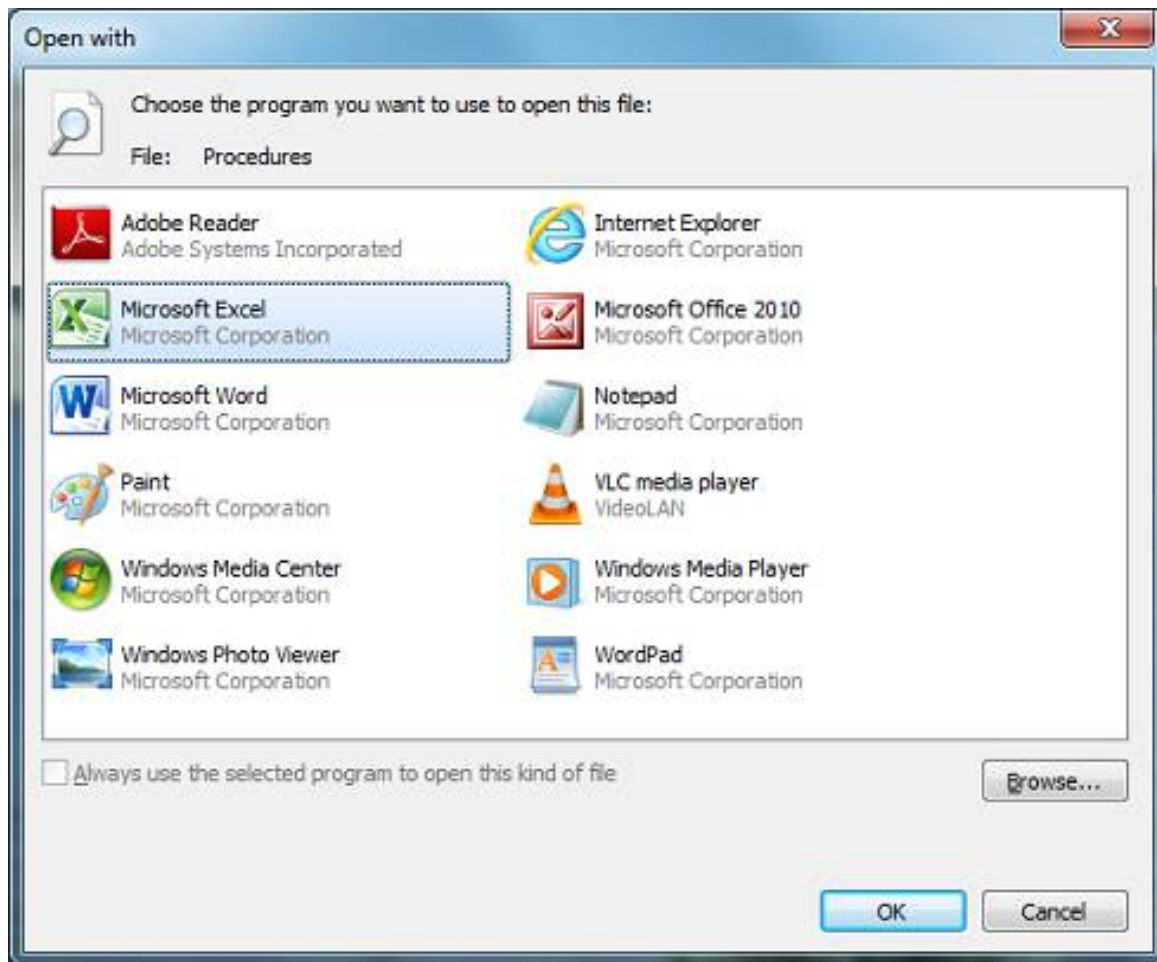
4. Click on the 'New Retrieval' icon shown above
  - a. The search dialog will appear with your original search criteria
  - b. Click on the 'Settings' tab and check the box, 'Result to file:'
  - c. Click the radio button, 'dBase' and choose your file destination by clicking on the 'browse' option to selection your file's destination.



- i. Name your file and click 'Open'. You'll see that your file destination is now populated in the 'File name:'
- ii. Click 'OK'



5. Locate the file where you stored the file to and right-click on the file and choose 'Open'. A new window will appear giving you a list of programs to open the file with.
  - a. Choose Microsoft Excel and click 'OK'



- b. You will probably receive an Excel warning as shown below. Disregard and click 'Yes'.



- c. There will be some column information specific to DocuWare shown in your file such as "DOCID, STORETIME and PAGECOUNT". You may delete these columns so that you're only displaying desired information.
- d. Your Results List will now be an Excel file that you can save or share with your colleagues.

Index - Microsoft Excel

	A	B	C	D	E	F	G	H	I
1	DOCID	STOREDATE	STORETIME	PAGECOUNT	DISK OFFSET	FLAGS	DOCUMENT_N		COM_UNIT
2	136	6/29/2002	14.16	1	1	0	2 CABINET PROFILE FILTERS		RM
3	133	6/17/2002	9.52	1	1	0	2 FILTER ACCESS RIGHTS DEMO INSTRUCTIONS		RM
4	132	6/16/2002	9.40	1	1	0	2 FILTERED ACCESS RIGHTS DOCUMENTATION FROM DW		RM
5	124	6/15/2002	15.59	1	1	0	2 ADVANCED ACTIVE IMPORT SETTINGS		RM
6	120	6/12/2002	15.25	1	1	0	2 USING DW WEB CLIENT TO EMAIL PDF ATTACHMENTS		RM
7	114	4/4/2002	15.28	1	1	0	2 SCANNING WITH CANON MFD		FINANCE
8	113	4/4/2002	15.28	1	1	0	2 INDEXING FINANCE DOCUMENTS		FINANCE
9	112	4/4/2002	14.33	1	1	0	2 MFD AND DOCUMENTS BASKET ISSUE		RM
10	107	3/16/2002	14.04	1	1	0	2 ADDING NEW FILE CABINETS		RM
11	105	3/12/2002	10.20	1	1	0	2 DW EMAIL FILE FORMAT CORRECTION		RM
12	104	1/9/2002	10.01	1	1	0	2 APPENDS AND NATIVE FORMAT STORAGE		RM
13	103	1/7/2002	16.23	1	1	0	2 MFD TEMPLATE ORGATION		RM
14	98	2/23/2002	15.30	1	1	0	2 SCANNING WITH MFD		RM
15	94	2/17/2002	12.20	1	1	0	2 CALCULATING STORAGE SPACE		RM
16	93	2/17/2002	12.19	1	1	0	2 EXTRACTING RESULTS LIST REPORTS		RM
17	76	1/1/2002	12.57	1	1	0	2 BARCODE STUDIO DRAFT		RM
18	53	1/24/2002	7.55	1	1	0	2 DOCUMENTS INSTALLATION ON WINDOWS CLIENT		RM
19	27	10/18/2001	9.44	1	1	0	2 THIVING DOCUMENTS INTO DOCUMENTS		RM
20	15	10/18/2001	9.15	1	1	0	2 COM DW WEB CLIENT ADDRESS		RM