THE UNIVERSITY OF ARIZONA

College of Medicine

Operations Manual

Desk Procedure – Appending documents and how to store documents in their Native Format

Process: Converting electronic documents to DocuWare TIFF format, and native format storage process

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Purpose: To provide a step-by-step process to add emails and other electronic documents to existing DocuWare records.

Contact: COM - Records Management

Definitions and Responsibilities

Tools and Resources:
DocuWare
Microsoft Outlook
Various Microsoft programs

Overview:
Digitally born documents can be stored in DocuWare by appending them to existing documents or storing them by themselves. Files that are not introduced into DocuWare by means of scanning them can have a variety of file types, many of which can be stored in the native format. These varying file types can be either be converted to DW TIFF format to allow documents to be appended to existing DocuWare records as an 'append', or stored as an individual document. DocuWare requires a DW TIFF file format that most all document types can be converted into by using a tool available to users called, DocuWare TIFFMAKER 5. This tool coverts any existing file type such as Word (.docx) and Microsoft Outlook (HTML) to TIFF format, thus allowing the file to be attached to any existing DocuWare record or stored entirely separate in its native format.

Responsibilities:

All DocuWare users are responsible for appending any correspondence such as email or additional documentation to related documents in DocuWare using the TIFFMAKER 5 Printer.

Other Related Documents and Forms

List supporting documents, other university and external documents that provide relevant information to this procedure.

University Related Documents and Forms	Other Related Documents and Forms
Flowcharts:	Websites:
Websites:	Forms:
Forms:	
Other Related Procedures:	

Process

1. If you have a document such as an email that needs to be appended to a record within DocuWare, double click on the email quick view link to expand the email within its own separate window.

    a. Once the document or email is open in its own window, proceed to the File menu and select Print.

    b. Within the print options menu select 'Print'. You'll need to select the printer called DocuWare TIFFMAKER 5.
        i. By selecting TIFFMAKER 5 the email will be converted from a Microsoft Outlook document to DW TIFF format so that it can successfully be stored in a DocuWare file cabinet.
   ii. Click Print.
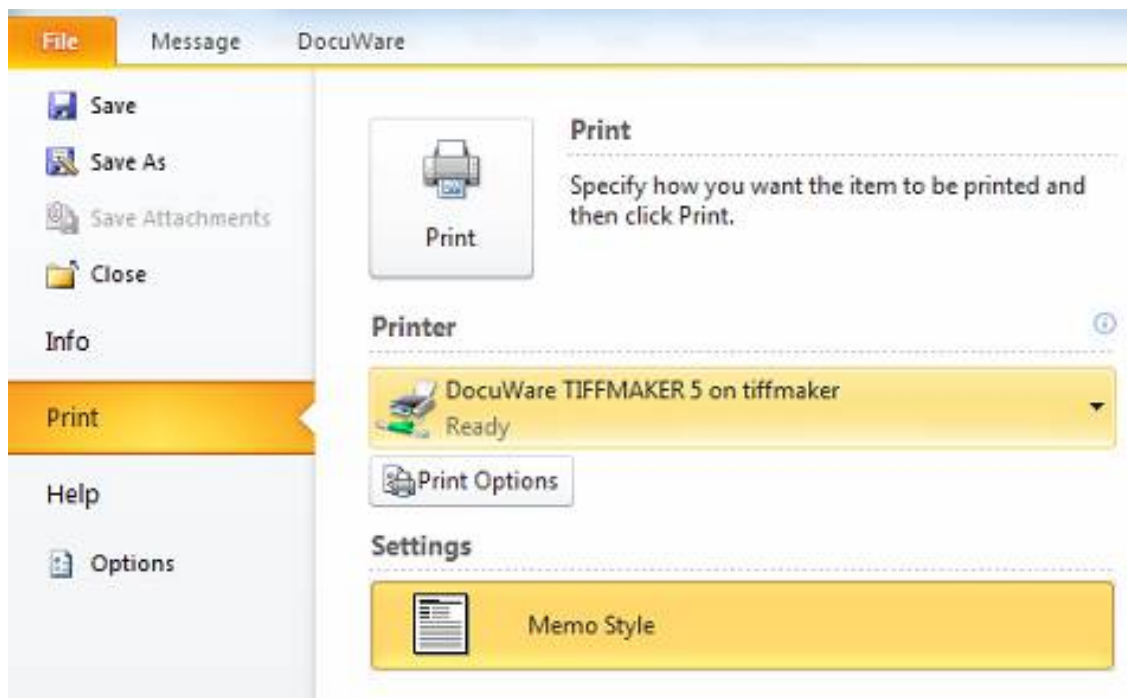
Note: Every DocuWare user has been assigned an electronic basket within DocuWare based off their assigned user name in the College of Medicine's Active Directory (e.g. John Doe's basket would be titled jdoe).

    c. After clicking Print, a TIFF format version of the document will show up within your personal DocuWare basket.
    d. From your basket, you can either add all necessary index values and store the document directly into the DocuWare file cabinet, or you can append the document to an existing file already stored in a file cabinet.
    e. If you append a document, place an electronic 'Append' stamp on the first page of the document.
        i. Public Stamps are located on the left side of the DocuWare Viewer. Hover over the stamps to see a description on their title.


        ii. This stamp will provide information such as who appended the document and what day and time it was appended.
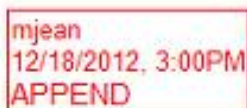
2. Next, search the DocuWare file cabinet for the DocuWare record you want to append the document to.

    a. The Results List will open displaying your search hits.

    b. From the Results List, select the record you want to append the email to.

    c. Next, select the TIFF image of the document/email you printed to your personal basket using the Tiffmaker printer option.

    d. Note: Ensure that both the DocuWare entry and the TIFF version of the email are selected before clicking the Append icon ⬚. The TIFF document in your basket will appear highlighted blue and the DocuWare entry will appear black as seen below.
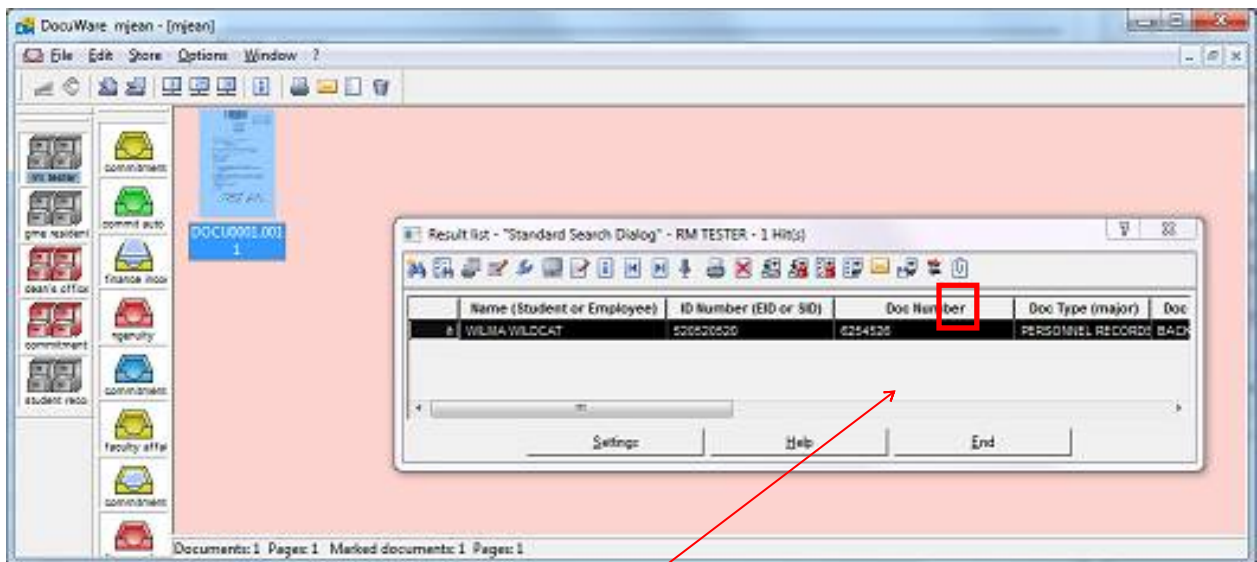
3. Lastly, click the **Append** button.

    a. The email/document has been successfully appended when a lower case 'a' appears in the left column of the Results List on the record.
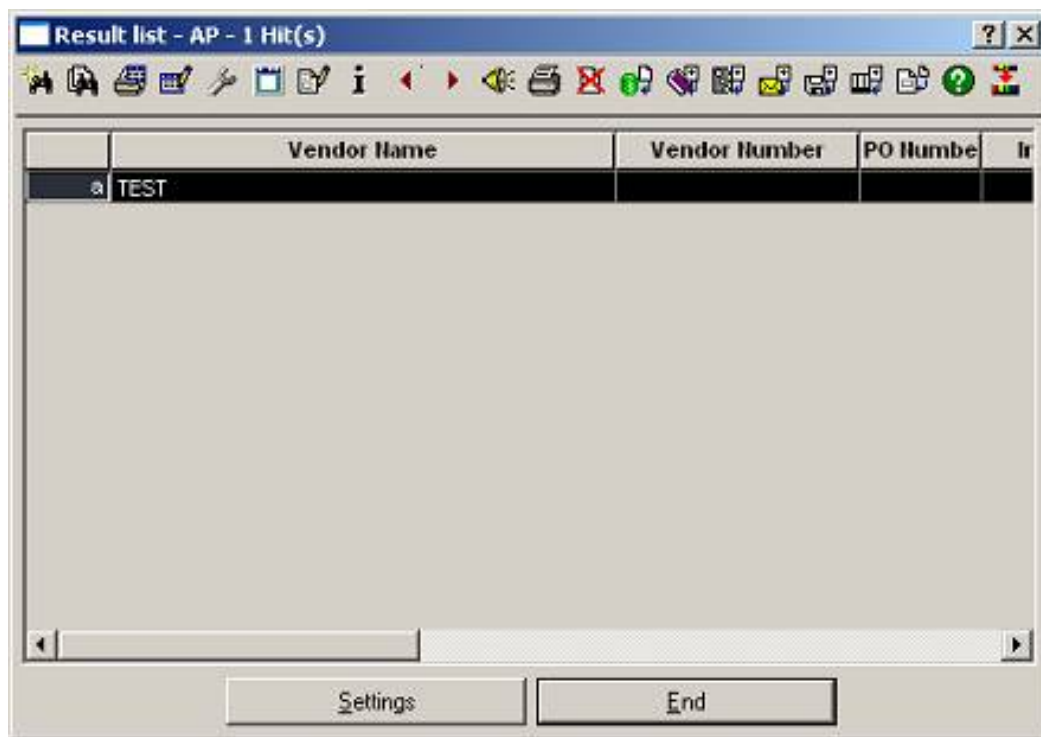
b. The document/email record has been successfully appended!
c. You now need to manually delete the document from your basket that printed using TIFFMAKER.

4. Storing a Microsoft Office documents in Native Format.

   a. This is as simple as dragging the file from your desktop into your DocuWare basket.
      i. Once a document has been dragged into your DocuWare basket you can click on it to highlight it blue. Be sure you have the proper file cabinet selected by single-clicking the cabinet to highlight its name blue.
      ii. Next, click on Store in the toolbar on your main DocuWare window.
      iii. Enter all required index data for storage.
         1. Make sure the 'delete from basket' box is checked in the storage dialogue window. This will commit the document you are storing into the file cabinet and instantly make it available for other users in your office.
         2. Click 'OK'.
   b. To store a document in its native format (Excel, Word, PowerPoint) just click & drag the file without opening it into your basket. From here, select the document along with the appropriate file cabinet and click on Store.
      i. Add all necessary index field information and click OK to commit the file into the file cabinet.
   c. To retrieve the document for editing you will need to enter required search criteria in the cabinet's search dialogue.
      i. Right-click on the file within the Results List to open any file in its native format so that you may edit or modify the document.

    ii. Left-clicking the document will open it as a TIFF format document.

   iii. Saving your changes can be accomplished following the same protocol used to save any Microsoft file by clicking on Save.

*Revised 12/18/12