HABEL®

Dokumentenmanagement

ALLES GEHABELT. ALLES GEREGELT.

Administration

Software manual

Release 2018

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1 Introduction

1.1 Preface

The HABEL document management system is a database-supported administration system for electronic documents.

The purpose of this software manual is to assist you in performing responsible work with HABEL.

If you have any questions about the system, our support staff will be glad to help you.

1.2 Overview

This user manual is aimed at HABEL administrators. It explains the specific functions and settings.

1.3 Symbolism in this manual

General symbols

This list marks the description of actions for you to perform.

■ This item marks bulleted lists.
  – This line marks lists on the second level.

Cross references

Cross references are displayed as follows: ✋ *"General symbols" on page 5*

1.4 Information regarding this manual

The figures may differ in certain details from your HABEL document management system, as functions may be included that have not been purchased and/or activated for your system. These can generally be easily added to your system. Please speak to your customer support agent about this.

Please send any suggestions, requests or criticisms to **handbuch@habel.de**. Thank you.

The captions and specifications in this manual are only used as examples and therefore can't be applied 1:1 to every situation. For that reason, you should consider your situation individually.

2 HABEL Administration

All the key HABEL administration programs are combined in a graphical user interface. To start the *"HABEL Administration"* program, double-click the corresponding ICON. Alternatively, run *"HpHab888.exe"* in the 32-BIT directory.

This is a sample view of what you see when you start *"HABEL Administration"*:
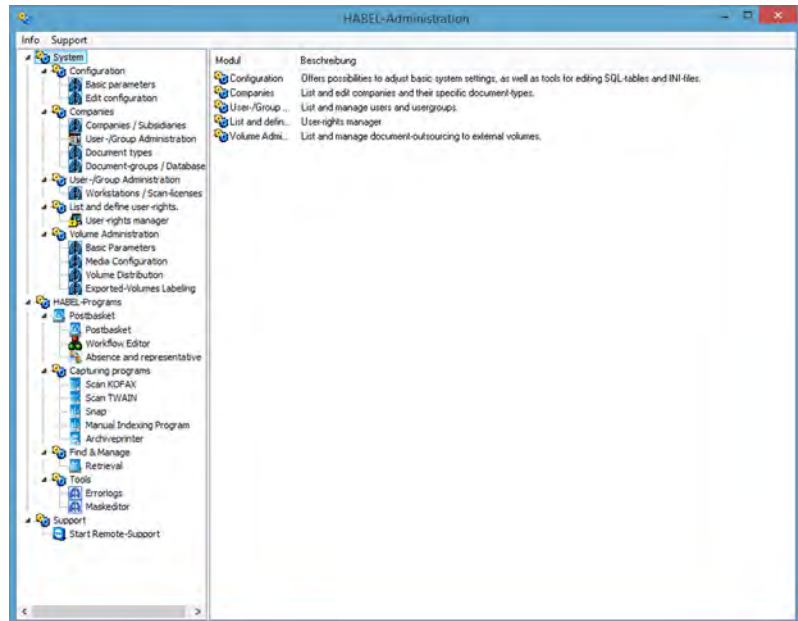
Fig. 1: "HABEL Support"

You can configure the following settings here:

■ Define **companies/subsidiaries**
■ Define **document types/subdocument types**
■ Create **users** and manage their **users**

You can also place programs in the Quickstart and call them up from there. When you call up a program in the column on the left, it appears in the window on the right. You can then configure settings from there.

2.1 System

The *"HABEL Administration"* is divided into connected sections. There is a general section that allows users to adjust all system settings themselves, an area to select the *"HABEL programs"* and a *"Support"* area. In the *"System"* area, you can perform and view system-related settings, such as those for the company and user administration. This area is divided into the following subsections:

2.1.1 Configuration

In this area, you can view the base parameters of HABEL and edit configuration files.

2.1.1.1 Base parameters

You can define a wide range of basic settings in the *"Base parameters"* section.

Generally, HABEL employees set the base parameters and modify them. An administrator can call up various settings here.

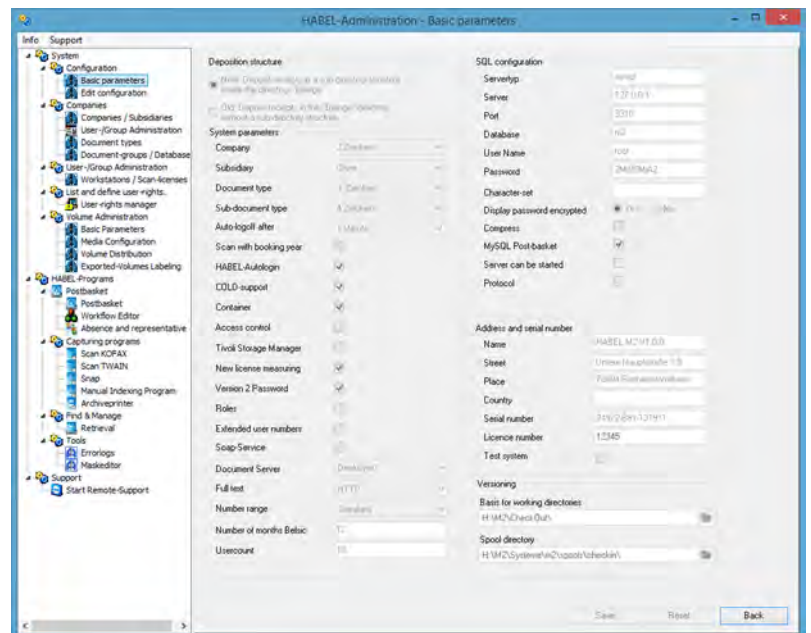*Fig. 2: Administration — Base parameters*

> **!**
> **NOTICE!**
> Changes within the *"Base parameters"* are only performed by HABEL employees!

2.1.1.2 Edit configuration

> **i**
> *Only persons who have participated in configuration training may make the changes listed in this section. Erroneous or wrong changes can impact the operability of the system.*

If you have participated in the configuration training provided by HABEL, you can make changes to various configuration files in the section *"Edit configuration"*. In the right area you can select the desired table and then open the table to make changes in the GVIM Editor by using the function key [Open with Editor]. With the button [Create backup] you can save the current version of the configuration file and call up a different version with [Access backup]. You can also [Save] or [Reset] your edits.

2.1.2 Company

In the *"company"* area you can make and view company- and user-related changes.

2.1.2.1 Companies/subsidiaries

You can create further companies/subsidiaries here. You can also delete existing companies/subsidiaries.

Click the *[New company]* button. Enter the number and name and confirm with *[Save]*.
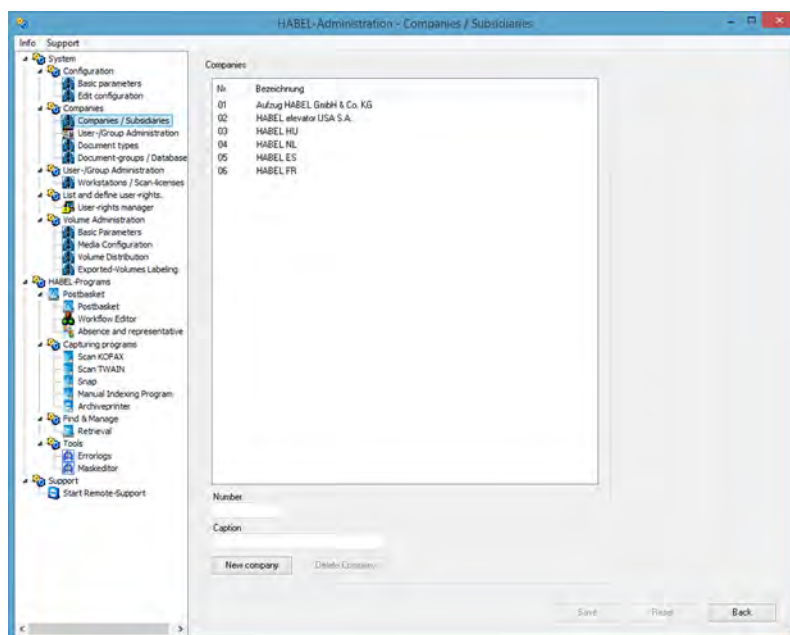

Fig. 3: "HABEL Support — Companies/subsidiaries"

If you delete a company, the documents archived for this company can no longer be retrieved via the company.

> **!**
>
> **NOTICE!**
> Please consult with HABEL **before deleting** companies.

2.1.2.2 User/group administration

In this area you can manage all users and groups created in HABEL.

2.1.2.2.1 General

In the *"User Administration"*, you can store the people who use the HABEL system. Users' general access rights to databases etc. are also stored here. To assign *"rights"* to a user, you need to allocate this user to a group first.

> **!** **NOTICE!**
> Employees who have left the company should be set to *"inactive"*. The references to workflows and documents will then be retained, although these users can no longer gain access.

The *"user groups"* and *"document groups"* are managed in the Group Administration. Users who, for example, belong to a particular department, team or division are grouped together in *"user groups"*. Users who are in a group have the same access rights. Optionally, you can also set up user groups as post basket recipient groups.

Document types are grouped into *"document groups"* depending on which department they belong to, for example Accounts or Personnel. Functions such as *"Correction"* or *"Export"* in the retrieval are also controlled via the document groups. The settings for the *"Client Installation"* are also managed in this application.

2.1.2.2.2   Program layout

All the users which have been created are displayed in the area on the left (1). The data for the selected user is shown in the area on the right (2). This area offers various functions for changing user data or creating new user data (3).
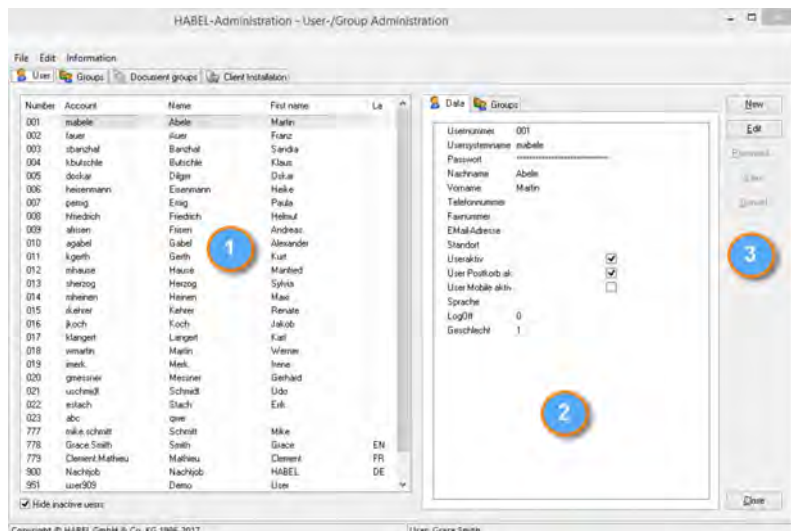

Fig. 4: Created users

2.1.2.2.3   *"Menu bar ➔ Symbols"*

In the *"User/group administration"*, you can use the *"File"* menu item to access various functions which are explained below:

"Print"

Use this command to print a summary of all the users stored in the User Administration together with their master data. All the information entered in the *"Data"* section will be listed.

Import from *"Active Directory"*

You can also transfer users from the *"Active Directory"*. If you wish to do this, after this you only need to assign the rights and/or store the password.

"Close"

Use this command to close the program. You can also use the *[Close]* button on the right of the mask or close the window by clicking on the *[X]* symbol.

Under *"Edit"* in the menu, you can access various editing functions. These are also available as buttons in the area on the right of the mask:
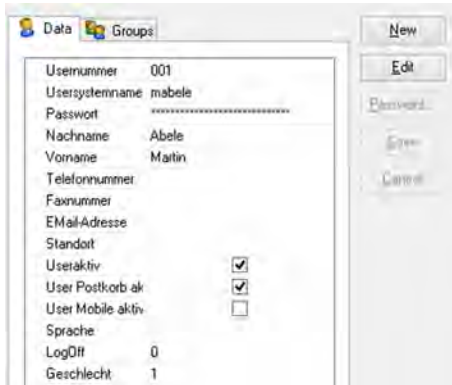
"New"

Use this command to create new users.

"Change"	This command is used to change the master data of the selected user. In *"Change"* mode, other commands become active.

2.1.2.2.4   User administration

Fig. 5: New user

Click *[New]* to create a new user. The *"user number"* is assigned automatically. The new user is allocated the next available number.

You still need to add the following details:

"Usersystemname"	This is the login name for logging into HABEL applications. For Autologin, the Usersystemname must be identical to the Windows user name.
"Surname"* and *"first name"	Enter the surname and first name.
"User active"	If you do not check "User active", the user cannot use any HABEL applications.
"Password"	Click the *[Password]* button on the right. You can now enter the password. You will need to verify it by entering it again. The password can be changed by the users themselves in the login window by clicking on the button with the three dots *[...]*. If Autologin is active and the Usersystemname in HABEL corresponds to the login name on the computer, you can use HABEL without having to log in again each time.
	Other personal data is optional.
"E-mail address"	If you enter an e-mail address, the user can also be defined as a recipient of the Job Monitor log or be defined in the contract and personnel archive.
"Language"	This option defines the system interface language for this user.

|	
"LogOff"	With this option, you can configure that logged-in users are to be logged off automatically from the *"HABEL Retrieval"* after a certain time.
	If you enter *"0"* here, this user will not be automatically logged off. Any number *"greater than 0"* activates automatic log-off. The number defines how many minutes will elapse until the user is logged off if he or she is not actively using HABEL.
	Example:
	If you enter the number 20, the user will be logged off if he or she has not actively used the HABEL application for 20 minutes.
Remove users	You cannot remove users from the User Administration. To deactivate employees who have left the company, uncheck *"User active"*.
Group allocation	When you create new users, the document group allocation will open automatically when you click *[Save]*.
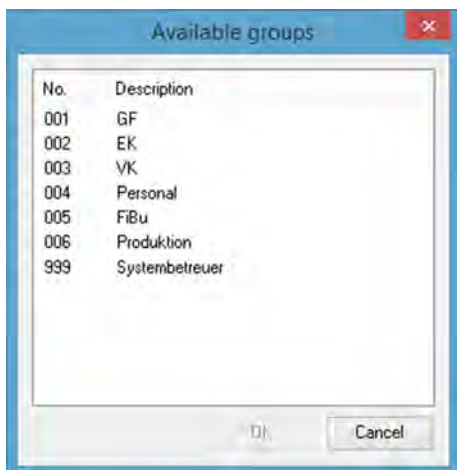
Select one or more group(s) here for this new user. The user will be assigned their initial rights based on this user group. If you do not select a user group, or if you select a user group to which no rights have been assigned, the user will have *"full rights"*.

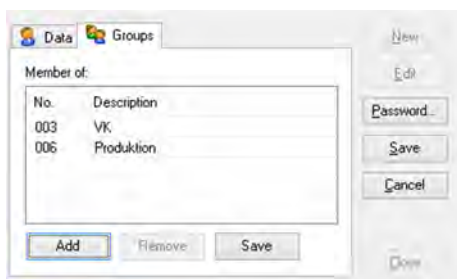You can assign additional groups retrospectively to users who have already been created (*"Groups"* tab).

Fig. 6: "Available groups"

Click the *[Change]* button to set the group membership for selected users. To assign further groups to the user, click *[Add]*. Click the *[Remove]* button to end the user's membership of a particular group.

NOTICE!
No changes to groups are made here. This option only defines the membership of the user in question to particular groups.

Fig. 7: Assign "groups"

2.1.2.2.5   Group administration

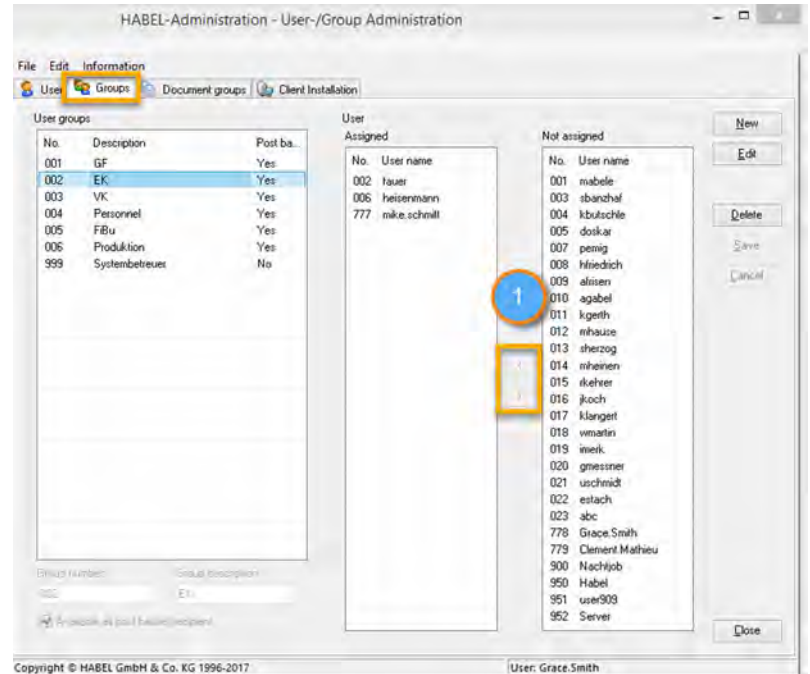Groups are managed in the *"Groups"* tab in the *"User/Group Administration"* section.

Fig. 8: "Groups"

This section shows you the existing user groups and which users are assigned to which groups. To assign users to an existing group, select the group. Then click the *[Change]* button. Use the arrows (1) to assign users to this group or remove them from it.

Select the *"New"* button to create *[new groups]*. When you click this button, the fields *"Group number"*, *"Group description"* and *"Available as post basket recipient"* are cleared. Enter your data and save it.

You can also *"change"* and *"delete"* groups here.

> **! NOTICE!**
>
> If you delete groups, there may be users who are no longer assigned to any group. These will then have full rights, unless rights are defined at user level. It is therefore very important to check before deleting groups which users are assigned to this group and whether they belong to other groups.

2.1.2.2.6   Document groups

Document groups are assigned to user groups in the *"Document groups"* tab in the *"User/Group Administration"* section. Here you can define the document groups to which the user group has access rights.
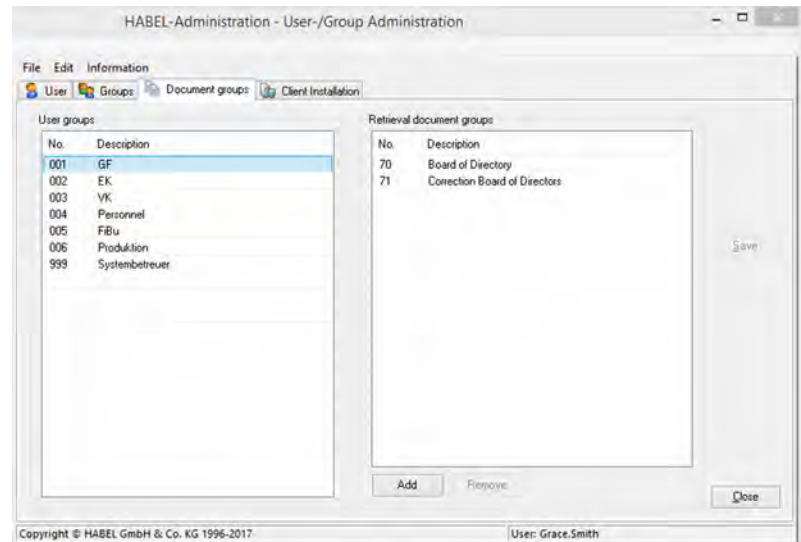

Fig. 9: "Document groups"

The document groups are managed under the menu item *"Document groups"*, which is also integrated in the *"HABEL Administration"*. Details of this are provided later.

2.1.2.2.7   Client installation

Use the *"Client installation"* for rapid, standardized setup of work-stations. Settings for this are configured in the *"User/Group Administration"*. To add new users to the Administration, you can import them from the *"Active Directory"* and control the client installation on the server side. You can also perform the installation on the client side directly with the program *"HpHab859"* (*"Client installation"*).
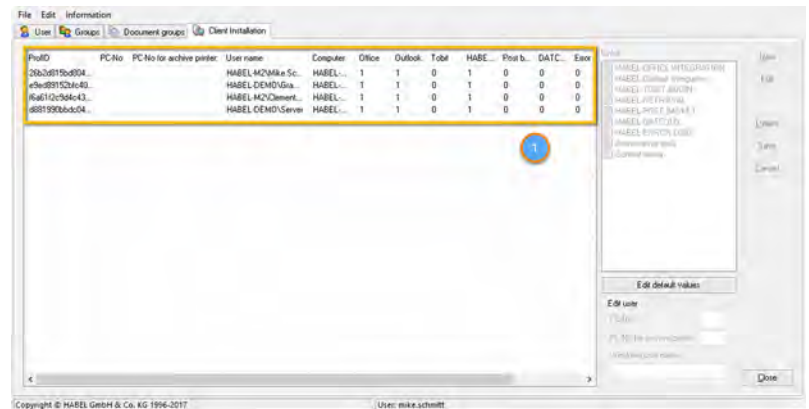

Fig. 10: "Client installation"

The users/workstations created in the system are displayed in an overview in the *"Client installation"* tab (1). In addition to the ProfID, the assigned PC number, the PC number for the archive printer and the user name are stored for each one.

The overview also includes the links and programs which have been assigned to this user.

Explanation of the codes:

I   -   Installation on next start-up.

0   -   Not installed/no installation necessary.

1   -   Installed successfully.

U   -   Will be uninstalled on next start-up.

Click the *[Change]* button to edit the link settings for the user in question. The *"Links"* selection box is then active. You can now increase or reduce the assigned links.
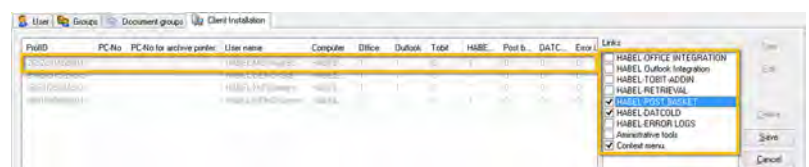

*Fig. 11: "Client installation ➔ Links"*

In our example, the links *"Office"* and *"Retrieval will be uninstalled"* (U) and Post Basket *"installed"* (I) for the user HABEL \Mike Schmitt on next start-up. If you select further links and click *"Save"*, these will be ready for installation the next time the pro-gram is started up. The column will then have the code I.

You can set default values which will apply to all users in order to define a basic configuration for new users. Click the *[Edit default values]* button. The *"Links"* selection box is then active. Select the values that are to apply as the basic configuration for future users. Select *[Save default values]* to apply the settings.
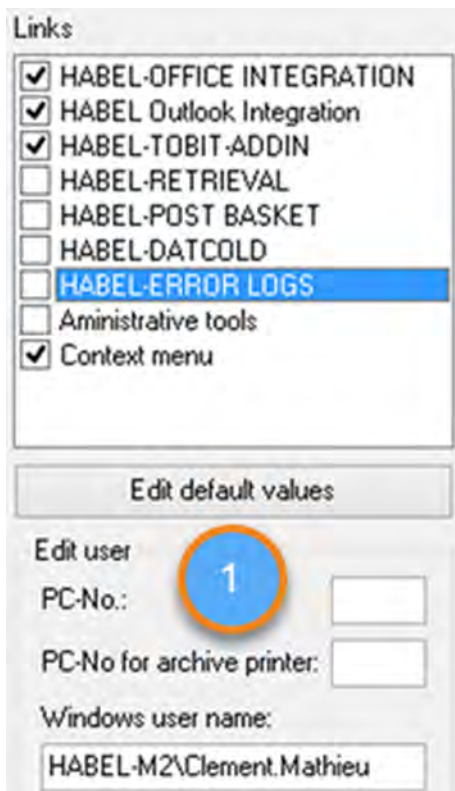
The *"PC-No."* and *"PC-No. for archive printer"* must be different (1). These numbers are used to assign names to the archive files. If no PC number has been assigned, the user will be assigned an available PC number automatically the first time they start up a HABEL capture program. The PC number for the archive printer is required if two HABEL capture programs need to be opened **simultaneously**, such as the scanning program and the archive printer.

Fig. 12: Selection of the links

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2.1.2.3   Document types

In the *"Document types"* section, you can create new document types (1) and assign them to document groups (2) and clients (3). In our example, *"PUR Inquiry"* is assigned to the document groups *"HABEL-DIG General"*, *"Archive printer General"* and *"Retrieval General"* with the document type key 0001. This means that this document type can be selected for indexing in the original format and for archive printing, and is also visible in the retrieval. The assignment to the companies determines which companies this document type can be used for (taking into account the respective document group).
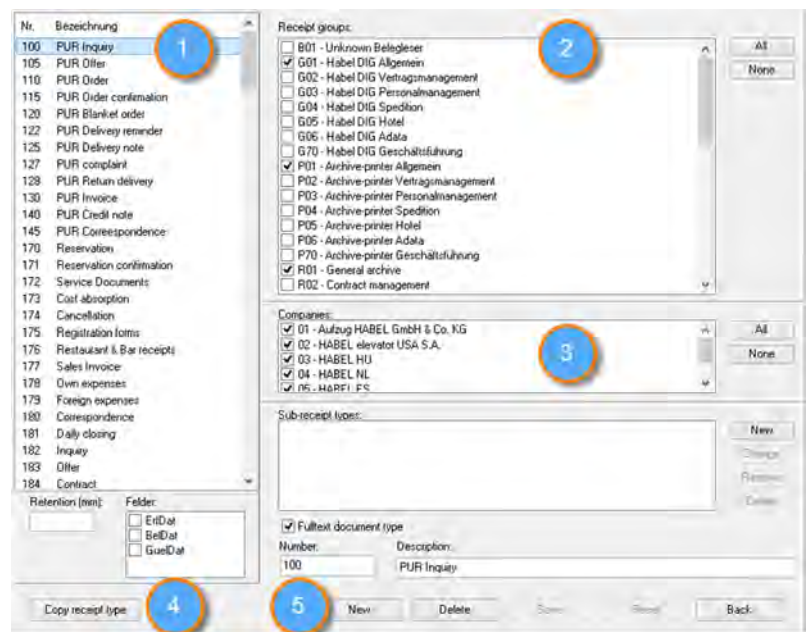

Fig. 13: "Document types"

Use the *[All]/[None]* buttons for quick selection or deactivation of the document group assignment and company assignment.

To create a new document type, you can access existing document types and copy them (4) or open a corresponding mask by clicking *[New]* (5).

> **! NOTICE!**
>
> For the document types created in this way, additional settings must be configured relating to the masks and rights. To do this, you should attend the Administrator Training at HABEL and/or use the HABEL MASK EDITOR.
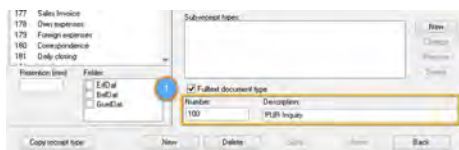
Fig. 14: Change document type

If you select a document type and click the
*[Copy document type]*button, the entries under *"Description"* and
"Number" will be cleared. Enter the relevant information and save
the new document type. You can also define here whether the
document type is to be a full-text document type (1) (only possible
in archive printer or scanner). Check the corresponding checkbox.
Existing document types can be changed later to full-text document
types.

> **!** **NOTICE!**
> Documents which have already been archived will
> not be recognized as full text subsequently.

Sub-document types can only be allocated to a new document type
after saving. The *[New]* (2) button becomes active as soon as you
click on the new/existing document type in the document type
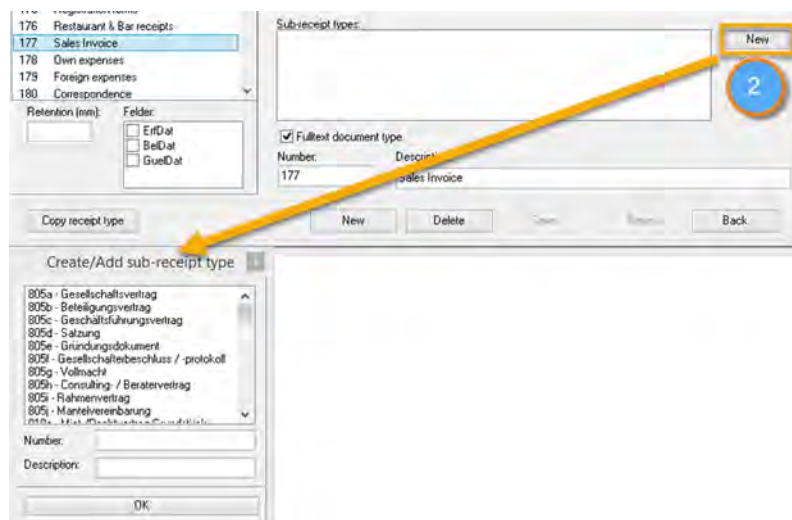selection.

Fig. 15: Assign document type

Enter a number and description to create new *"sub-document
types"*. You can also assign existing sub-document types by
selecting them from the list. The *[Change]*/*[Remove]* buttons allow
you to change or remove the assignment to this document type.
Use the *[Delete]* button to completely remove the sub-document
type from the selection.

To create new document types, click *[New]*. Now assign the docu-
ment groups and companies. Enter the name and number.

To delete individual document groups, select the relevant docu-
ment group. Click the *[Delete]* button and confirm with *[OK]* in
response to the question which then appears. The document type
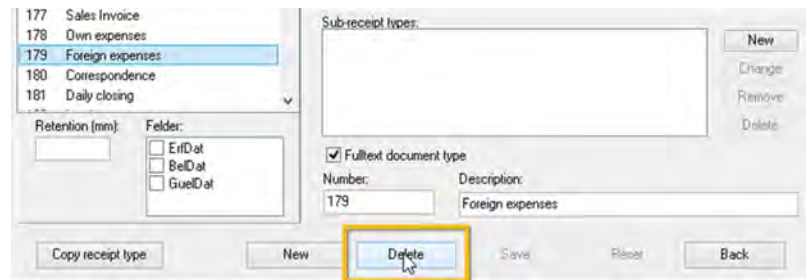is then deleted from the database.

Fig. 16: Delete document type

> **!**
>
> **NOTICE!**
> Deleting the document type does not lead to entries being deleted. These will still remain in the database.

2.1.2.4   Document groups/databases

In the *"Document group"* / *"database administration"* you can assign all defined document types to a database and document group. To do this, select the desired document group in the desired program in the top right area. In this example, document group 01 was selected in *"Retrieval"*. The left area shows all of the document types defined for this document group. By clicking *[add]* or *[remove]*, the list of document types in this document group can be adjusted. In the lower right section, you can see the settings for the document group. Here you can change the internal key for the document group, the key for the mask definition, the SQL database name and its alias name, the specification of a log file and the name of this document group in the HABEL programs. With the checkbox *"Available for mobile?"* you can make this document group available for the *"HABEL Mobile"* module.
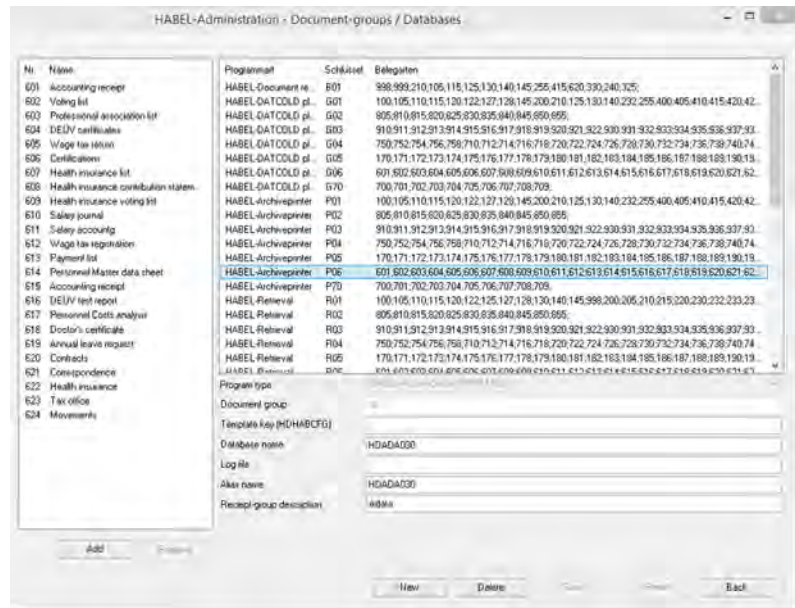
Fig. 17: Document groups and databases

2.1.3   Number ranges

In the *"Number ranges"* section, you can find configurations for the workstations and scan licenses.

2.1.3.1   Workstations/scan licenses

This menu is divided into the tabs *"Counter"* and *"Scan licenses"*. The *"Counter"* tab lets you view all the computer numbers and which document type was used to write on which WORM. There is also a counter for the previously archived data. The *"Scan licenses"* tab lists the computers that have a *"HABEL scan license"*.

> *Only HABEL employees can make changes here.*

2.1.4   User rights manager

The individual rights of users or groups can be edited and managed in *"User rights manager"*.

2.1.4.1 User manager (rights)

Rights can be assigned and limited for all HABEL programs with the *"User manager"*. They can be edited for users as well as groups.

2.1.4.1.1 General

You have already assigned higher-level rights (access to document groups) to created users through the assignment to user groups and document groups.

With the *"HABEL USER MANAGER"*, you can control the access rights of the individual users all the way down to field level. Within the *"HABEL USER MANAGER"*, you can assign rights for groups and/or individual users in order to protect the whole archive from being viewed by unauthorized parties.

To access the *"HABEL USER MANAGER"*, select the following symbol or start the program *"HpHab881"*.

If you have started the *"HABEL Administration"*, you can also access the User Manager in the *"User rights manager"* section.

In general, the following applies:

■ If the user has been assigned *"no rights"*, this user has *"full rights"*. From the moment that you define at least one right, the user will only have the rights that have been assigned. Exception: HABEL can set up system-wide access protection, i.e. users have no access to HABEL until the corresponding rights have been set up.

■ An assigned right cannot be invalidated by another right. For example, a user is explicitly assigned a right. He or she is a member of a user group that does not have this right.
Consequence: The explicitly assigned right is **not** invalidated, even though the group does not have this right.

■ Rights are checked for **all items** of an archived document, not just the first item.
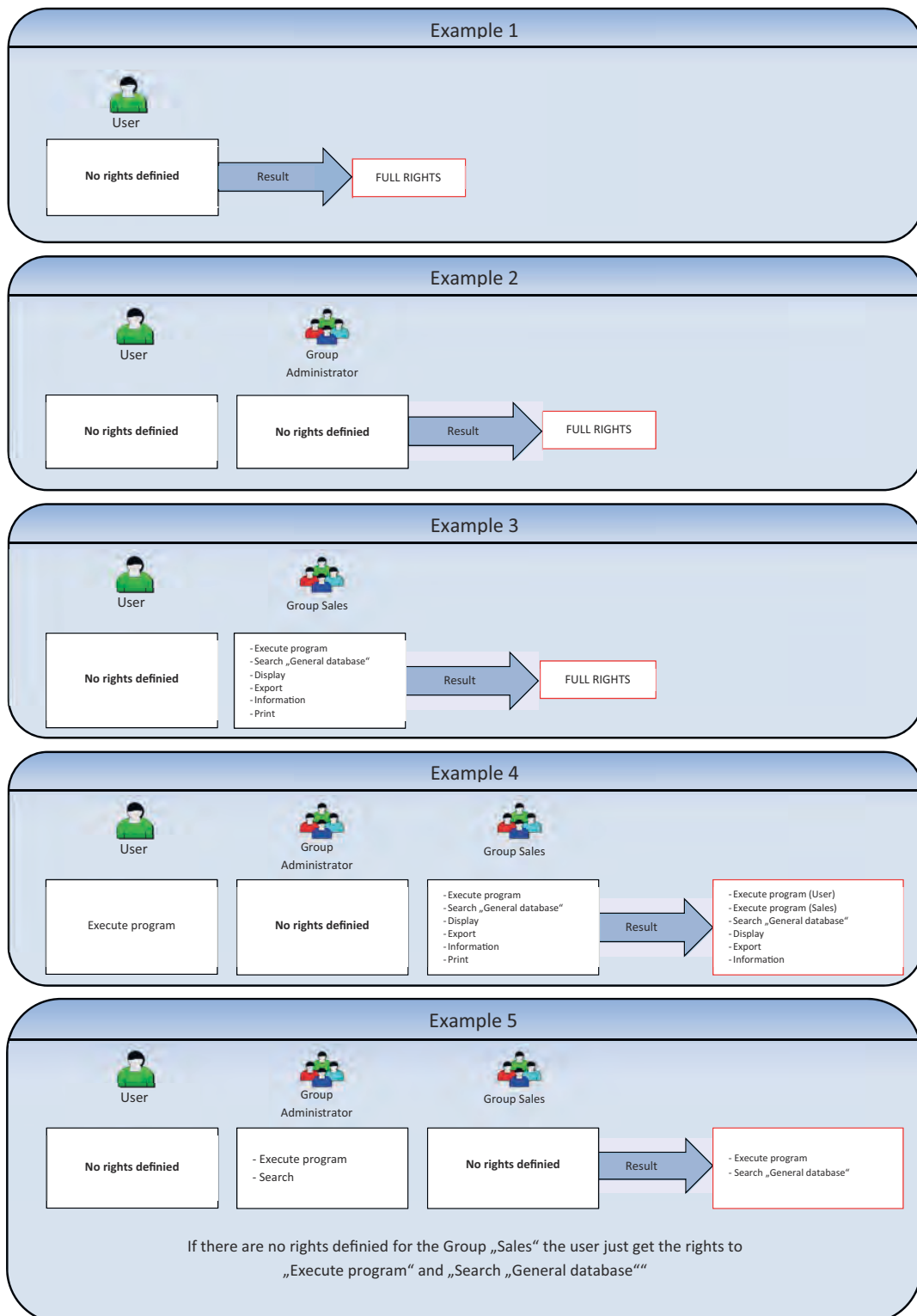
Example 1

User

| No rights defined | Result → | FULL RIGHTS |

Example 2

User Group Administrator

| No rights defined | No rights defined | Result → | FULL RIGHTS |

Example 3

User Group Sales

| No rights defined | - Execute program
- Search „General database"
- Display
- Export
- Information
- Print | Result → | FULL RIGHTS |

Example 4

User Group Administrator Group Sales

| Execute program | No rights defined | - Execute program
- Search „General database"
- Display
- Export
- Information
- Print | Result → | - Execute program (User)
- Execute program (Sales)
- Search „General database"
- Display
- Export
- Information |

Example 5

User Group Administrator Group Sales

| No rights defined | - Execute program
- Search | No rights defined | Result → | - Execute program
- Search „General database" |

If there are no rights definied for the Group „Sales" the user just get the rights to „Execute program" and „Search „General database""

Fig. 18: Examples for the distribution of rights for various groups

2.1.4.1.2   Program layout

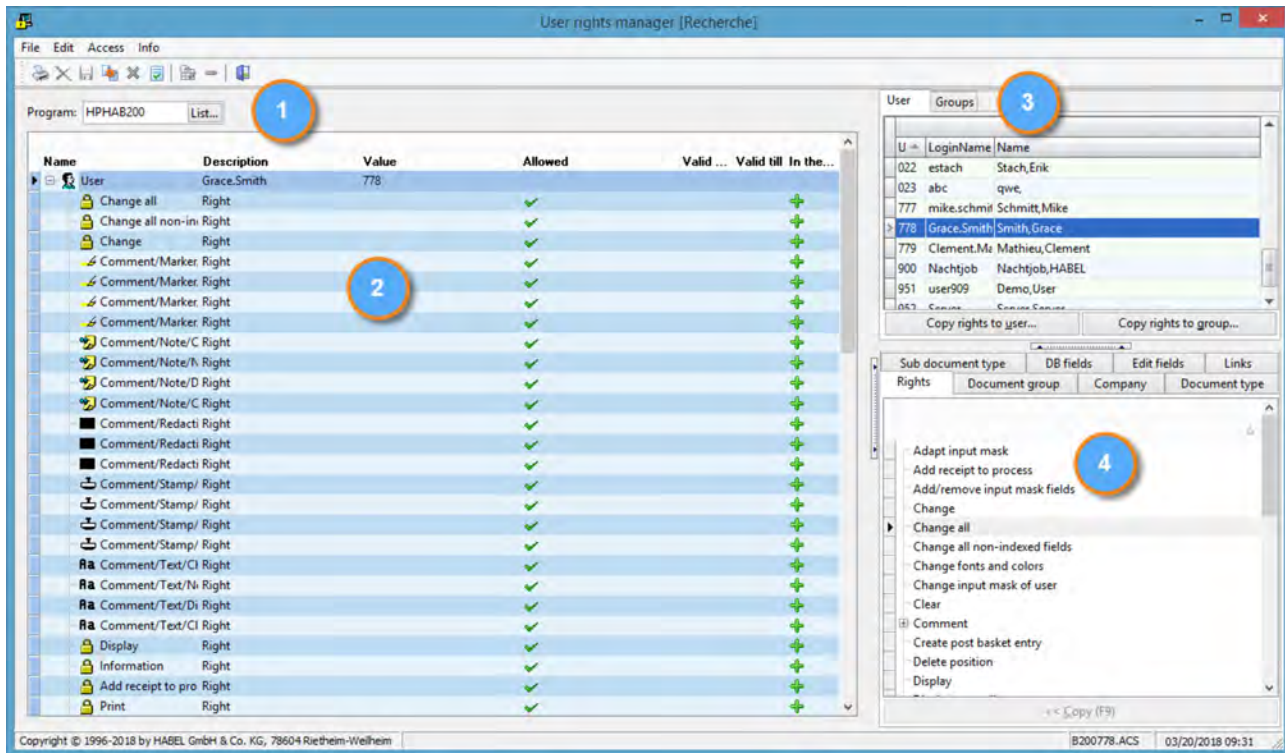*Fig. 19: "User rights manager"*

1   Selection of the program for which you assign rights to the user/group in question
2   Display of the selected user and the assigned rights (tree structure)

3   Selection of the users and groups
4   Management of the rights down to the level of the individual database field

Please note that you must assign separate rights to the users **for each program** (Retrieval, Capture, Post Basket).

2.1.4.1.3   Menu bar — Symbols

Functions under *"File"*

"Print" (toolbar 🖨)   Prints overview of the selected user's rights

"Print preview"   Preview of the printout.

"Close" (toolbar 📕)   Closes the program.

Functions under *"Edit"*

"Copy rights to user" (*[Ctrl] + [B]*) Assigned rights can be copied to other users
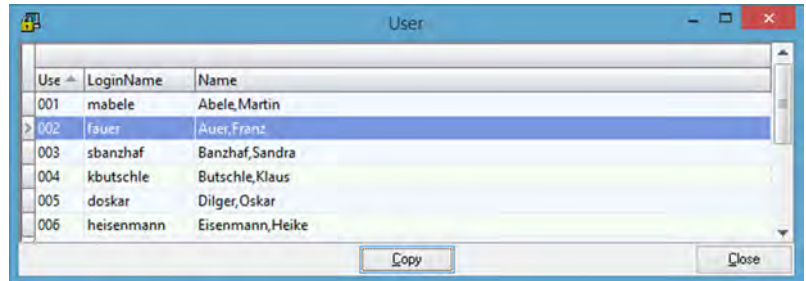

Fig. 20: User rights — Manager — Copy rights to users

"Copy rights to group" (*[Ctrl] + [G]*) Assigned rights can be copied to groups.

Functions under *"Access"*

The commands *"Delete"*, *"Allow"* / *"Forbid"*, *"In date range"* / *"Out of date range"* and *"Edit date range"* are available as soon as a right has been selected within the *"user"* / *"group"*.

Click *[Save]* immediately after making changes to the rights.

"Delete" (*[Delete key]*) (toolbar ✗) To delete assigned rights for a user/group, select the right in the area on the left and delete it using the menu command or the *[Delete]* key.

"Allow/Forbid" (*[F6]*) (toolbar ✓) If a right is assigned and marked as forbidden (toolbar ✗), the user does not have this right.

Example:

The View right is assigned for documents. For documents for which the *"Subject"* field contains the content *"Complaint"*, this right is not granted. The user is then allowed to see all documents apart from those for which the subject is *"Complaint"*. With this function, assigned rights for a user can also be temporarily deactivated without deleting them from the rights tree. You can access this command in the menu or alternatively with the function key *[F6]*.

" Save" (*[Ctrl] + [S]*) (toolbar 🖫) Save the changes.

"View all" (toolbar 🗋)

Select this option for a complete overview of the selected user and his or her assigned rights (both user assignment and group assignment). You can see where each right originates from in the *"Description"* column.

Fig. 21: User rights — Manager — View rights

NOTICE!

Each element is evaluated individually. For example, the *"Search"* right is assigned for multiple groups. Within the first group, a document type is excluded from the Search right (e.g. Correspondence), which means that everything can be searched for apart from the document type *"Correspondence"*. In the second group, searching is only explicitly allowed for one document type (e.g. *"Applications"*), so that no document types apart from this may be searched for. If the rights of these two groups are combined, the user would still only be allowed to search for the document type *"Applications"*, because a right is assigned which cancels out the others.

With the [key], you can expand all rights at once.*

"Check rights" (*[Ctrl] + [R]*)
(toolbar ⬜ **)**

Based on the rights, you can determine whether a particular user (1) has been assigned these rights. Either select individual rights and check whether the user has access (2) to this function, or press the *[Check]* button (3). Alternatively, you can call up a complete overview and display of all rights (Access yes/no) for a particular user by clicking the *[Check all rights]* button (4). The selection of the assigned rights can be restricted to document groups, companies, subsidiaries, document type, subdocument type etc.
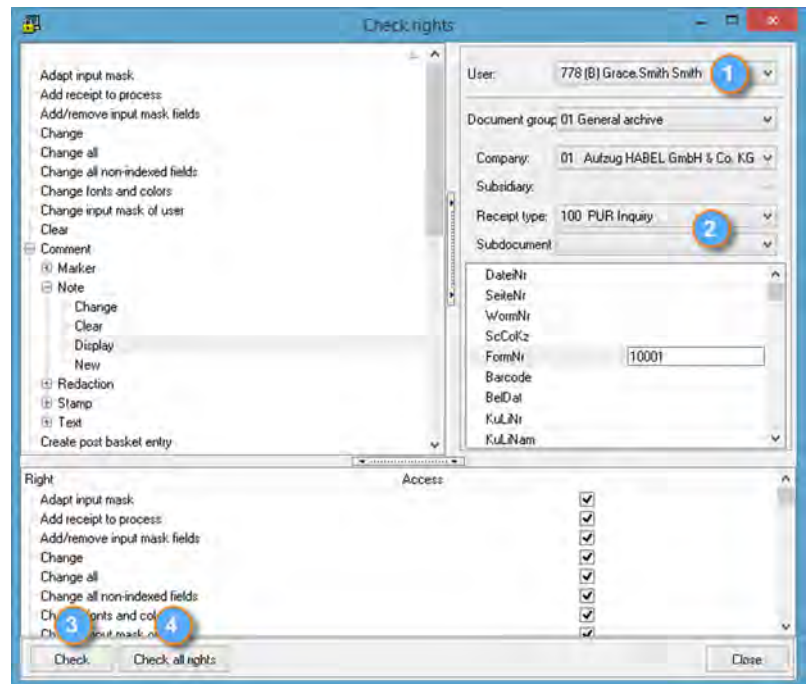

Fig. 22: User rights — Manager — "Check rights"

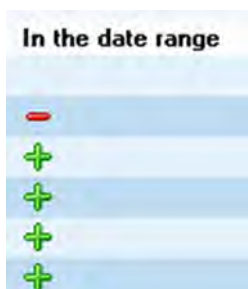**" In date range"/ "Out of date range"** (*[F7]*) **(toolbar** ➕➖ **)**

This option lets you enter a validity period for the assigned right (such as activities spanning a certain time period).

Fig. 23: User rights — Manager — "In date range"

" Edit date range" **(toolbar** ⬜ **)**

This option lets you enter a validity period for the assigned right (such as activities spanning a certain time period).
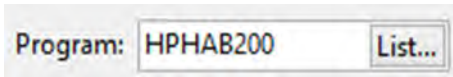
2.1.4.1.4 User rights manager

Assign rights

To assign rights to users or groups, proceed as follows:

1. ▶ Press the *[List]* button to open the program list.

Fig. 24: User rights — Manager — Program list

⇨ The program list opens.

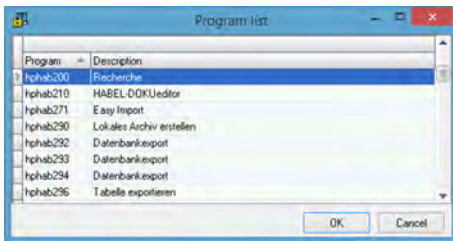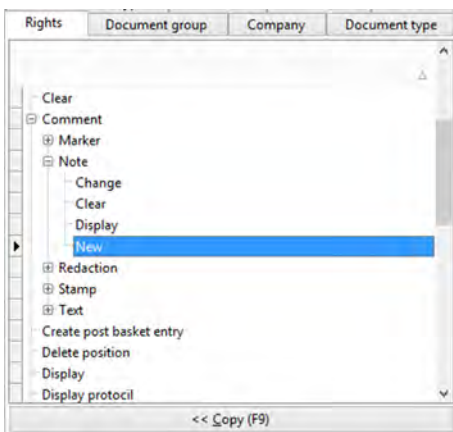**2.** ▶ Select the program for which you want to assign rights.

Fig. 25: User rights — Manager — "Program list" — Selection
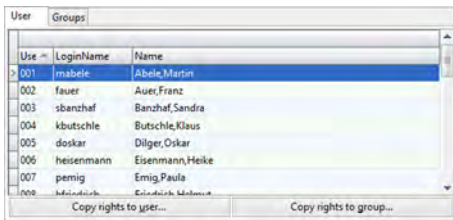
Fig. 26: Select user

Fig. 28: User rights — Manager — Assign rights

Fig. 27: Mark user

3. ▶ Select the user or group.

After selecting the user, ensure that this user is marked as selected in the overview window on the left.
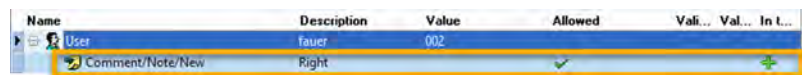
Fig. 29: User rights — Manager — Assign rights — Result

4. ▶ Assign the *"rights"*.

You can assign the required rights on the right-hand side. Always proceed from tab to tab (from left to right). If you have selected an assignment that cannot be assigned in this way, the *[Copy]* button will not be active. Please note that the right immediately superior in the hierarchy must always be selected on the left in order to assign the next level below it.

! **NOTICE!**

A user needs the *"Search"* right in order to perform any search and to be assigned other rights such as *"Attach note"*, *"Print"* etc. *"View"* is important, in order to view the hits as a document (including in relation to the document preview). Make sure that these rights are assigned.

First assign the right to the user or group, such as, in this case, *"creating notes"*. Select the right you need and click *[Copy]* or use the function key *[F9]*. The right will be assigned to the user.

Assign document group

If required, you can restrict assigned rights to document groups in the second tab.

In this case too, the following applies:

If you have not made a selection, the user has the right for all document groups listed here.
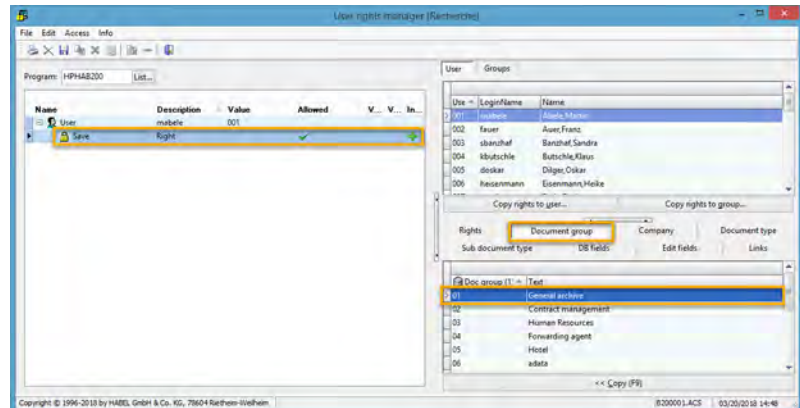

Fig. 30: Assign document groups

In our example, we restricted the user's *"Search right"* to the document group *"General archive"*.

1. ▶ Select the *"Search"* right on the left-hand side and on the right-hand side, under the *"Document group"* tab, select the document group *"General archive"*.

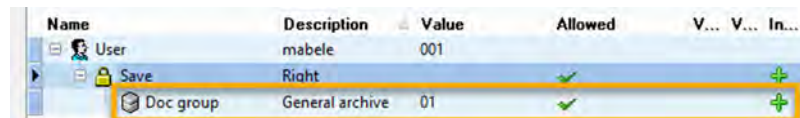*Fig. 31: "Document group in general"*

2. ▶ Click the *[Copy]* button or press *[F9]*. The *"Search"* right is now restricted to the document group *"General archive"* in the rights assignment of the user in question, in our example *"mabele"*.

> **!**
>
> **NOTICE!**
> This user must also be assigned to this document group in the Document Group Administration, otherwise the rights won't be effective.

Assign company

In the *"Company"* tab, you can define which companies the user or group is allowed to access. In our example, access for the document group is restricted to *"Company 01"* in the *"General archive"*.
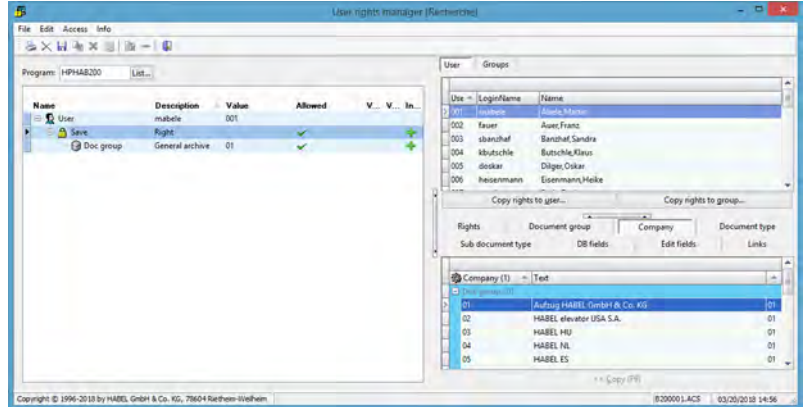

Fig. 32: Assign company

1. ▶ Select the document group *"General archive"* on the left and Company 01 in the *"Company"* tab.

2. ▶ Click *[Copy]*. The rights tree of *"mabele"* expands. Her access rights have now become more restricted.
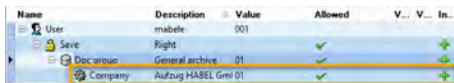
Fig. 33: Assign company — Result

Assign document type

If the user's access to document types is to be restricted, you can define this in the *"Document type"* tab.
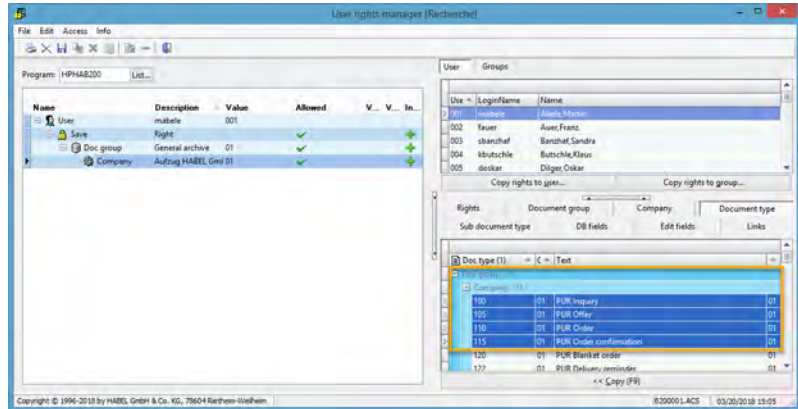
Fig. 34: Assign document type

1. ▷ Press the *[Ctrl]* key and click on the required document types to select multiple types simultaneously.

Fig. 35: Assign document type — Result

2. ▷ Click the *[Copy]* button to transfer the document types to the rights tree. The user's rights are now restricted to the following document types.

Assign subdocument type

In the *"Subdocument type"* tab, you can also set restrictions at subdocument type level. To do this, subdocument types must exist for the previously selected *"document type"*.

Assign database fields

In the document types, you can also assign rights to individual *"database fields"*. You can configure settings for this in the *"DB fields"* tab.

Fig. 36: Assign DB fields

1. ▶ Select a corresponding field.

2. ▶ Click *[Copy]*.

⇨ A window opens in which you can enter the values for the selected field.

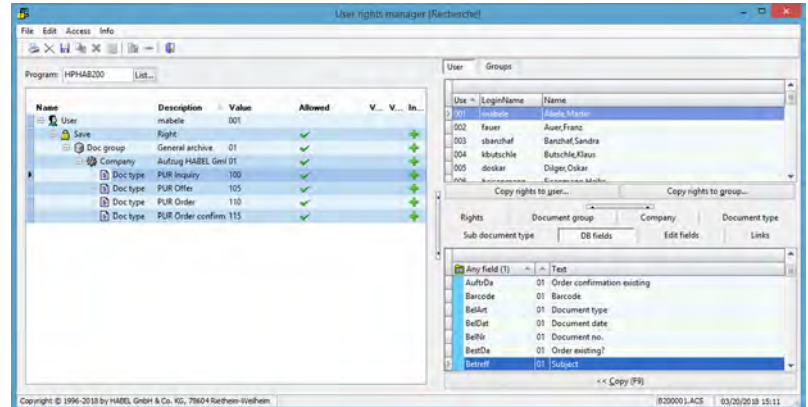**3.** ▶ Enter the value that the field is to have. This user's document access is then controlled by these keywords/field contents.
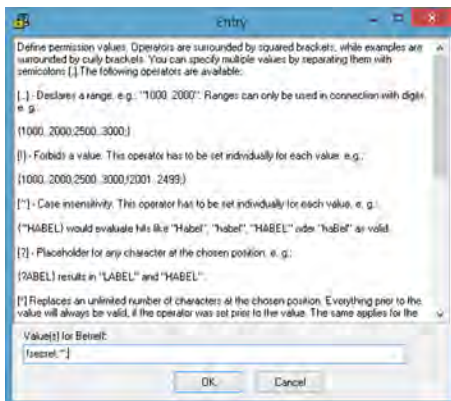
Fig. 37: Assign DB fields — Enter value

Example:

The user *"mabele"* is allowed to search everything in the company HABEL GmbH & Co. KG (document group General archive) within the document type *"Correspondence"*, provided that the subject field is not filled with the term *"secret"*.

The Entry box defines the characters with which values can be excluded or default values entered. Please note: If empty database fields are to be excluded from the rights assignment, the characters @@ must be entered.

Assign Edit field

Edit fields control the *"Edit"* right. In combination with creating database fields, edit rights can also be permitted for particular fields/values.

Links

If rights are to be linked with each other, such as, for example, the *"Search"* right and the *"Export"* right (user is allowed to export the same things that he or she can search), this can be set in the *"Links"* tab.
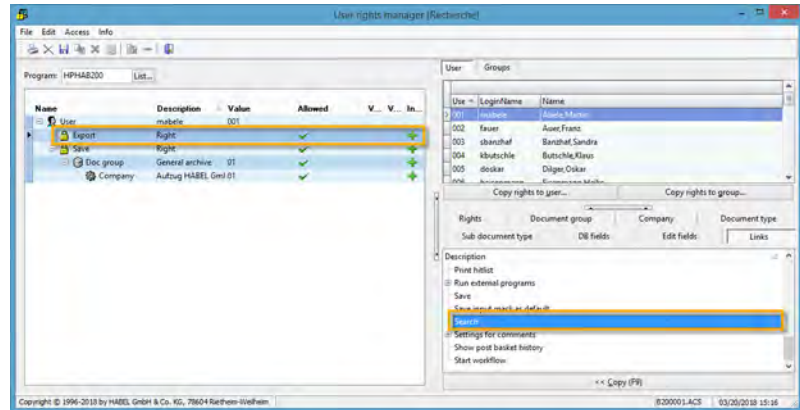
Fig. 38: Assign "links"

Fig. 39: Assign links — Result

1. ▶ Select the right on the left (in this case: Export) and the right to be linked in the *"Links"* tab (in this case: Search).

2. ▶ Transfer the link by clicking *[Copy]* or pressing *[F9]*. The user is now permitted to export and search identically. If changes are made within the *"Search"* right, this has the same effects on the *"Export"* right. This ensures that changes to the *"Search"* right also influence the *"Export"* right. If there are restrictions to the *"Search"* right, for example, the user does not have more rights for *"Export"*.

2.1.4.1.5 Copy rights

Existing rights can be transferred to users or groups.

Select a user and press the *[Copy rights to user]* button. You will then see a selection of users to whom the rights of the selected user can be transferred.
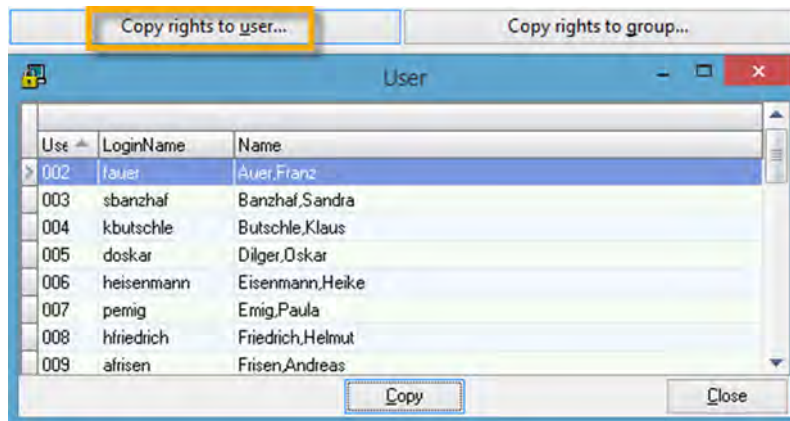
Fig. 40: "Copy rights to users"

Fig. 41: "Copy rights to group"

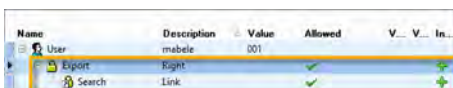To transfer user rights to groups, press the *[Copy rights to group]* button after selecting a user.
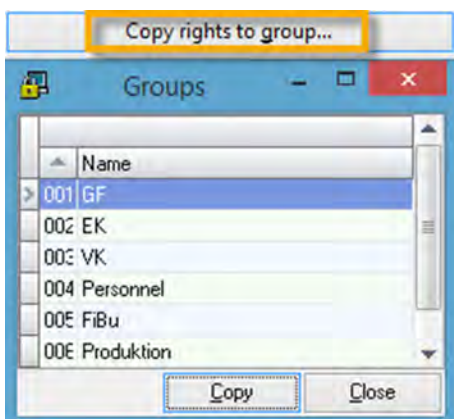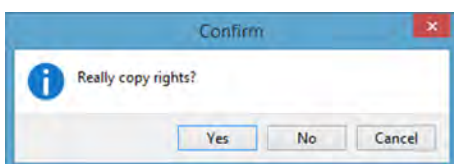
Fig. 42: Copy rights

A confirmation prompt then appears in which you can confirm the final copy procedure, or you can end (No) or cancel the copy procedure at this point.
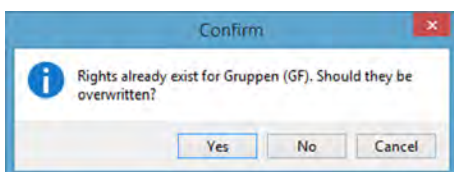
Fig. 43: Confirm copy rights

If rights have already been assigned to the user, you will be asked whether these are to be overwritten with the new rights. You can end (No) or cancel the copy procedure at this point. If you confirm with *"YES"*, the existing rights will be overwritten and not just the additional rights added.

The copying options are also available in the *"Group"* tab, in order to transfer rights from the group to another group, or from the group to users.

> ⓘ *If you have users/groups who mostly have the same rights, it is a good idea to copy these and then assign further rights to the user/group who/ which is to have more rights. This does not affect the other users/groups.*

2.1.4.1.6   Overview of the rights within the retrieval

"Change all"

The right *"Change all"* is linked to the right *"Information"*. It controls access to the *[Change all]* button in the retrieval information, which allows you to change the contents of all fields, provided that you are using the *"HABEL CORRECT"* module.

Change all non-indexed fields

If fields are empty, you can change them once the right has been assigned.

> **!**   **NOTICE!**
> If no right is assigned to the user, he or she has full rights. However, this rule does not apply to the right *"Change all non-indexed fields"*, which must be explicitly assigned.

"Change"

The right *"Change"* is linked to the right *"Information"*. It controls access to the *[Change]* button in the retrieval information (by default, only the content of the *"Information"* field can be edited). The *"Change"* right is controlled via Edit fields.

"Annotation"

In the tree selection under *"Annotation"*, you will find the various elements for structuring of annotations in the retrieval. The tools *"Marker"*, *"Note"*, *"Redaction"*, *"Stamp"* and *"Text"* can be managed here for specific users. Rights assignment for each tool is, however, only possible at the lowest level (*"Change"*, *"New"*, *"View"*, *"Clear"*).

Two special rules apply in this case:

- The right *"View"* cannot be explicitly assigned for the tool *"Redaction"* and is always active.
- A user is always permitted to clear annotations that he or she has created, even if he or she has not been explicitly assigned the right *"Clear"*.

"View"

When you find documents in the hitlist, the right *"View"* controls whether you are allowed to view the document or not. The *[View]* button is activated accordingly.

"Information"	This right controls whether you are allowed to view all the available index data for a document that has been found. In this case too, the *[Information]* button is activated accordingly in the Hitlist view.
"Add document to process"	This right controls whether the user is allowed to add documents to retrieved procedures. *"Add document to process"* is started from the *"retrieval"*, but is part of the capture programs.
"Print"	Found documents can be printed using the *[Print]* button or the menu bar. Access to this button can be controlled with this right.
"Save input mask as default"	This right defines whether the user is allowed to save the arrangement of the fields in the retrieval/information mask as the default setting for all users.
"Customize input mask"	The right *"Adapt input mask"* controls whether or not the user is allowed to change the arrangement of the fields in the retrieval/ information mask.
"Change input mask of user"	If the user has been assigned this right, he or she can call up and view the input masks of other users.
"Add/remove input mask fields"	Database fields can be shown or hidden for the view in the mask. To use this function, this right must be assigned. Important: If users are allowed to add or remove fields, this could affect the functioning of the whole system. This right should therefore only be assigned to a few users.
"Settings for annotations"	Various basic settings can be configured for annotations and tools. The right *"Settings for annotations"* defines whether or not you are allowed to make changes to these settings and then save them.
"Run dialog"	*"Run dialog"* controls access to the menu item *"Annotation"*.
"Export"	The right *[Export]* controls whether a user is allowed to export data from the retrieval and therefore whether the *"Export"* button is activated, provided that your system includes one of the HABEL EXPORT modules.
"Run external programs"	If scripts are stored in your system that access external programs, this right allows the user to use this function.

"Delete"	Incorrect entries can be removed from the archive. This entry controls whether or not the user is allowed to delete entries (index data) from the archive.
"Mail"	The right *"Mail"* is linked to use of the *"HABEL E-MAIL"* module. It controls the option of sending retrieved documents or just individual pages as an e-mail.
"Mail as PDF"	Like *"Mail"*, *"Mail as PDF"* is a right which is linked to the use of the module *"HABEL E-MAIL"*. The only difference is that retrieved documents or pages can be sent as e-mails in PDF format, subject to the purchase of PDF licenses.
"Edit item"	With this right, you can create the option of item capture (add, remove) in the information mask.
"Create post basket entry"	If you are using the *"HABEL POST BASKET"* module, this right controls whether the user is allowed to create a post basket entry from the *"retrieval"* or, if a workflow is defined, start it.
"Show post basket history"	An option with the same name is available when viewing documents, e.g. in the *"File"* menu. This right lets you control whether the user is allowed access to this option, provided that the *"HABEL POST BASKET"* is part of your system.
"Execute program"	If general access protection has been stored for the system, so that the user is not allowed to do anything until rights have been assigned, then this is a very important right. If this right is not assigned (as soon as any other right is assigned), the *"Retrieval"* can no longer be started, as *"Execute program"* means opening the program itself.
"Change fonts and colors"	This right allows the user to configure font and color settings in the *"Retrieval"*.
"Page layout"	This right lets you configure settings in order to, for example, customize the design of the hitlist printout (e.g. addition of company logo etc.).
"Save"	This right controls whether a displayed document can be saved as a file (*.tif) in any directory using the menu option *"File ➔ Save as"* and whether attachments can be saved.* The menu option *"File ➔ Save procedure"* remains unaffected by this right.
"Search"	The right *[Search]* controls whether a user has permission to retrieve, and therefore whether the *"Search"* button is activated.

"Print hitlist"	This lets you print the displayed hitlist.
"Print hitlist preview"	Like the right *"Print hitlist"*. This controls whether the menu option *"Print hitlist ➜ Print preview ➜ "* is activated or not.
"Overview"	With the menu option *"Annotation ➜ Overview"* you can view all annotations in an overview window.
"Display version info of annotations"	Annotations or editorial changes that are inserted with the tools *"Marker"*, *"Note"*, *"Redaction"*, *"Stamp"* and *"Text"* are logged in a version log. This right controls whether you can view the version info of the annotations.
"Start workflow"	This right allows the user to start a defined workflow again if it has not started automatically or if it needs to be run again.

2.1.4.1.7   Overview of the rights within the capture programs

"Annotation"	Annotations can be used within the capture programs too. The tools *"Marker"*, *"Note"*, *"Redaction"*, *"Stamp"* and *"Text"* can be managed here for specific users. Rights assignment for each tool is, however, only possible at the lowest level (*"Change"*, *"New"*, *"View"*, *"Clear"*). Two special rules apply in this case: ■ The right *"View"* cannot be explicitly assigned for the tool *"Redaction"* and is always active. ■ A user is always permitted to clear annotations that he or she has created, even if he or she has not been explicitly assigned the right *"Clear"*.
"Print"	Documents can be printed using the *[Print]* button or the menu bar. Access to this button can be controlled with this right.
"Save input mask as default"	This right defines whether the user is allowed to save the arrangement of the fields in the capture mask as the default setting for all users.
"Customize input mask"	The right *"Adapt input mask"* controls whether or not the user is allowed to change the arrangement of the fields in the capture mask.
"Change input mask of user"	If the user has been assigned this right, he or she can call up and view the input masks of other users.

"Add/remove input mask fields"	Database fields can be shown or hidden for the view in the mask. To use this function, this right must be assigned.
"Settings" **(different in the Scan and Archive Printer capture programs)**	The right *"Advanced properties"* allows the use of different settings in the capture programs. For example, with the right *"Delete blank pages"*, the user can configure settings in the capture program which define the file size above which empty pages are to be deleted. With the right *"Preview"* settings, the user can customize the document preview. The list for scan capture offers further rights for setting barcode recognition, scanner and directory parameters and graphics filters, which can be assigned to users. Rights for *"Saving"* the *"Settings"* / *"Saving the settings as default settings"* can also be assigned.
"Execute program"	Important right, because if this right is not assigned (as soon as any other right is assigned), the capture program can no longer be started, as Execute program means opening the program itself.
"Change fonts and colors"	This right allows the user to configure font and color settings.
"Save"	This right controls whether a document can be saved as a file (*.tif) in any directory using the menu option *"File ➔ Save as ➔ "* .* The menu option *"File ➔ Save procedure"* remains unaffected by this right.

2.1.4.1.8 Overview of the rights within the post basket

"React to payment clearance"	This right is relevant for users who need to start a specific function at the end of a workflow chain, e.g. create a particular file after a payment clearance. This right controls whether the user is allowed to perform this action.
"Set automatic clean-up"	If this right has been assigned, you can clean up both your *"Recycle bin"* and your *"Outgoing mail"* automatically after a specified number of days.
"Database information"	This right controls whether you can view the index data via the *[Information]* button. If the information is called up because you have this right, you will see the view of the *"First page"*.
"Database information (additional details)"	This right builds on the right *"Database information"*. If there are other details in your system for procedures (e.g. from the Accounts department), this information will be shown on another page (can be set for each page). Another tab is shown next to the *"First page"* tab. If you have been assigned the right *"Database information (additional details)"*, the other tab and therefore the additional details can also be shown.

"Show document"   If this right has been assigned, you can view the procedure by selecting the menu option *"View ➔ Document preview"* either in full screen mode or in the document preview in the post basket.

"Save input mask as default"   This right defines whether the user is allowed to save the arrangement of the fields in the post basket mask as the default setting for all users.

"Customize input mask"   The right *"Adapt input mask"* controls whether or not the user is allowed to change the arrangement of the fields in the post basket mask.

"Save input mask with document type"   This right defines whether the user is allowed to save the arrangement of the fields depending on the document type.

"Change phrases"   Texts are stored by default in the selection box for messages for post basket entries. The right *"Change phrases"* allows the user to add further texts, change texts, or delete some texts. The changes apply for all users (global).

"Delete protected entries"   Protected post basket entries are entries which are not yet finished or which are still subject to certain rules, e.g. a pre-specified workflow. If a document has been captured which is not meant to pass through the workflow because, for example, an employee in the workflow is not supposed to see this document, entries of this kind can be deleted after granting the right. However, this right should only be granted to the administrator and employees in appropriate positions.

"Change item" — "Remove item" — "Add item"   With this right, filled-in field content can be changed, deleted or added via item capture.

"View post basket"   This right defines which post basket the user can view.

> **! NOTICE!**
> – Users can always call up their own post baskets. They do not need a special right for this.
> – The rights assigned for the post basket include an additional tab, *"User ID"*, to control access to external post baskets.

"Edit post basket entries"   The right *"Edit post basket entries"* controls the option *"Changes allowed"*.

"Permanently delete post basket entries"	The right to permanently delete entries from the Recycle bin is managed here.
"Redistribute post basket entries"	Allows e.g. a team leader to forward to another member of staff documents which have been distributed from a group post basket to a particular staff member (e.g. if this staff member is ill).
"Execute program"	Important right, because if this right is not assigned (as soon as any other right is assigned), the post basket can no longer be started, as Execute program means opening the program itself.
"Change fonts and colors"	This right allows the user to configure font and color settings.
"Change column properties"	Right for showing or hiding columns and changing their sequence and labeling.
"Refuse payment clearance immediately" — "Cancel payment clearance chain" — "Start payment clearance chain"	These are rights relating to a special workflow with which, for example, payment clearances are also granted. These rights control whether or not the user can intervene in certain aspects.

"Practical examples"

If employees are to be assigned rights which are to apply only for one particular value in the database field across all document types, this can be done by assigning the database field at the rights level.

For example, user *"Auer"* is only to be allowed to search documents in which the field *"Cost center account"* is filled with *"1234"* or empty (empty is important because there are document types such as correspondence, for example, which do not require a cost center). If empty fields are to be excluded, the characters @@ must be inserted as values.

If there are multiple employees with the same rights, but variable values would need to be entered in the database field, these values can be mapped using variables. A separate file, which is linked to the rights tree, is maintained for the variables.
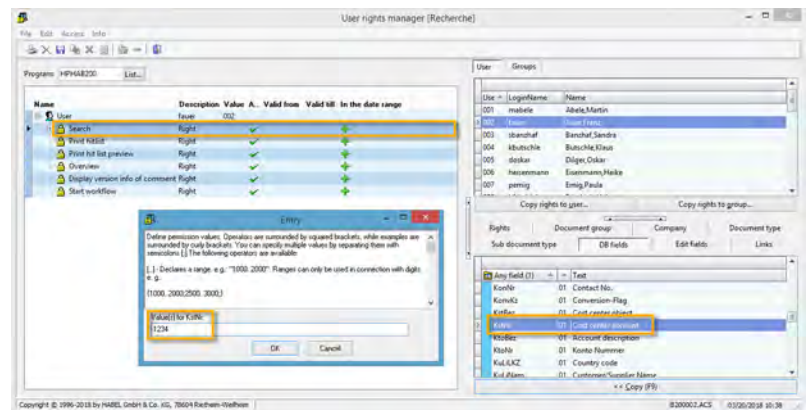
Fig. 44: Limit search right DBField
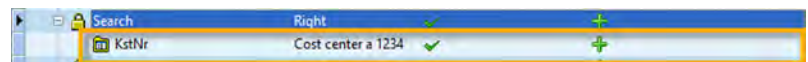
Fig. 45: Limit search right DBField — Result

2.1.5   Volume administration

In *"Volume administration"*, all configurations for the archiving on media (such as Blu-ray) can be seen and administered.

2.1.5.1   Base parameters

In the *"Base parameters"*, you can define what kind of storage medium is in the system. There is a distinction between an individual medium and collection medium. The drive letters and paths to the original and duplicate media can be specified in the right area. You can also create the directory structure for the media here (WORM ID).

These changes should be made by HABEL employees unless you have received instructions or training by HABEL employees.

2.1.5.2 Media configuration

The capacity of the storage media is defined in the *"Media configuration"*. The cluster size and reserved storage space can also be defined here, along with storage space control after a fixed amount of transferred documents.

These changes should be made by HABEL employees unless you have received instructions or training by HABEL employees.

2.1.5.3 Volume distribution

In *"Volume distribution"*, you can define which WORM numbers are found on which media.

These changes should be made by HABEL employees unless you have received instructions or training by HABEL employees.

2.1.5.4 Export labeling

Error and information messages can be stored with WORM labeling for specific WORM numbers. Such a case could be if *"WORM 001"* was not transferred to the medium due to an error, for example, and it doesn't appear in the retrieval *"Document not accessible"*. In this case, the message *"The document can't be shown due to a transmission error"*, for example.

2.2 HABEL programs

This is where links to the individual HABEL programs can be stored. These can be defined arbitrarily according to the customer's system.

2.2.1 Workflow

These links only exist if the customer's system uses the *"HABEL POST BASKET"* module.

2.2.1.1 Workflow (post basket)

This link opens the *"HABEL POST BASKET"*.

2.2.1.2 Workflow (editor)

This link opens the *"HABEL Workflow Designer"*.

2.2.1.2.1 HABEL WORKFLOW Designer

General

"HABEL WORKFLOW Designer" is a graphic interface for creating, managing and viewing automatic workflows. Workflows can be configured and changed using drag & drop.

There is a filter function to give you a better overview. You can use *"Search and Replace"* to rapidly substitute groups or users in the existing workflows. Existing workflows can be imported and edited. *"HABEL WORKFLOW Designer"* can only be used in conjunction with *"HABEL POST BASKET"*.

Program startup

When you start the program *"HABEL WORKFLOW Designer"* (*"HpHab670"*), the default file for workflows (*"HpTdl15x.ini"*) is opened automatically. Deviating files can be opened under *"File* ➔ *Open"* or saved under *"File* ➔ *Save as"* .

Program layout
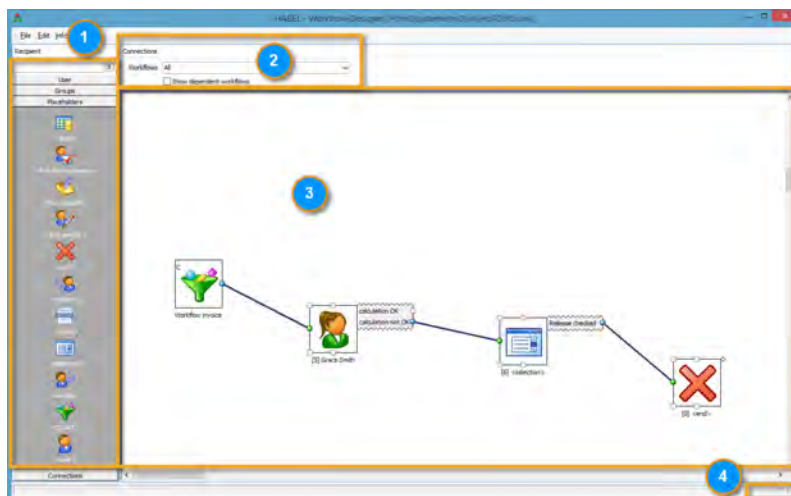
Fig. 46: Program layout

1   Selection area for workflow components
2   Selection of existing workflows
3   Workspace — edit, create and delete workflows
4   Zoom — enlarge or reduce view of the workspace (3)

Selection area for workflow components	The selectable components are located here, such as

- Users
- Groups
- Placeholders
- Links

These can be transferred to the workspace using drag & drop.

Selection of *"users"*   All HABEL users who are marked as *"User post basket active"* in the User Administration are available here.

Selection of *"user groups"*   All user groups which are *"Available as post basket recipient"* in the Group Administration are available for selection here. These are the groups which have their own group post basket.

Selection of *"placeholders"* Selection of different workflow components and actions

<field>

Select *"field"* to store a field from the database that is filled with user names. The field content must include valid user names so that the recipient can be determined correctly.

<first decision maker>

If you select *"first decision maker"*, the document will be sent to the original first *"decision maker"* again in the course of the workflow without needing to manually select the user/group here.

<first-recipient>

If you select *"first-recipient"*, the document will be sent to the original first *"recipient"* again in the course of the workflow without needing to manually select the user/group here.

<first-sender>

If you select *"first-sender"*, the document will be sent to the original *"first sender"* of the document again in the course of the workflow without needing to manually select the user/group here.

<end>

A workflow must always be ended with the end point *"X"*. All items in the workflow must end here. For a clearer overview, you can use multiple end points.

<recipient>

If you select *"recipient"*, the user who is currently logged in will themselves receive a new entry, if he or she edits their own entries. For entries of other users or groups, a new entry is created for the original recipient.

<Script>

Recipients can be selected e.g. with a selection list by means of a customized *"Script"* (scripts are customized programming).

If you use the component *"selection"*, the user will receive a selection list with all users/groups for forwarding the document in their post basket after executing an action. The deadline and additional information can also be transferred here.

<sender>

If you select *"sender"*, the document will be sent to the last *"sender"* (user/group), before the current item.

<START>

A workflow always starts with the component *"Start"*. In the properties, you can define the start conditions (document types, clients, fields etc.) and edit the name and descriptions for workflows.

<user>

If you select the component *"user"*, entries will be sent to the HABEL users who are currently logged in.

Selection of *"connections"*

Individual workflow components are connected to each other with the element *"Straight line"*.

Selection of *"existing workflows"*

The required workflow can be selected here. It is displayed in the workspace. All other workflows are hidden.
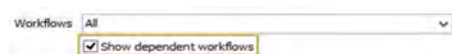
Fig. 47: Activate the display of all interconnected workflows

If there are dependencies between different workflows, all related components from other workflows can also be displayed by activating the *"Show dependent workflows"* checkbox.

Create a new workflow

Create a new workflow

To illustrate the functions, the example below shows how a simple workflow is created from beginning to end.

Use empty workspace

For optimum display, scroll to an empty workspace.

Start a workflow

Each workflow starts with a component. Use drag & drop to drag this to the workspace. The menu for entering further settings opens automatically.

"Basic settings"

The initial settings are defined in the Basic settings area:
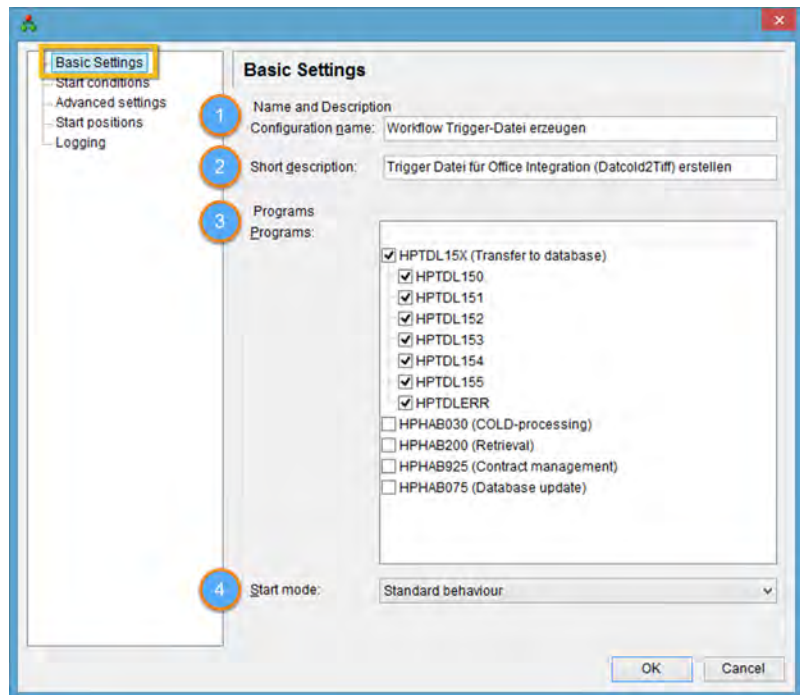
Fig. 48: Basic WF settings

1   *"Configuration name"*
2   *"Short description"*
3   *"Programs"*
4   *"Start mode"*

"Configuration name"	The *"Configuration name"* must always start with the word Workflow and should then contain a descriptive name. The name will also appear in the selection menu for workflow selection.
"Short description"	The workflow can be described in more detail under *"Short description"*. The description appears in the workspace as a label for the Start components.

"Programs"	Under *"Programs"*, select the programs from which a document is to be transferred to the workflow in the archiving procedure. The Transfer to database program is already preset. Other programs can be selected manually. **Important!** For starting from other programs, changes may also need to be made to the configuration of these programs in some cases.
"Start mode"	Under *"Start mode"*, you can select different behaviors for the start of the workflow. ■ Standard behavior — the selected procedure is used for the workflow. ■ Send copy of the original document — a copy of the procedure is created and the workflow is started for this. ■ Send copy of model — if templates exist for procedures, a new procedure is created for the template with the index data of the original procedure and the workflow is started for this. ■ Send original document. Corresponds to the standard behavior. The selected procedure is sent. The options *"old workflows aborted"*, *"old workflows ended"* and *"no old workflows"* prevent procedures from being placed in a workflow a second time.

"Start conditions"

As the second step, you need to define the Start conditions for the workflow:
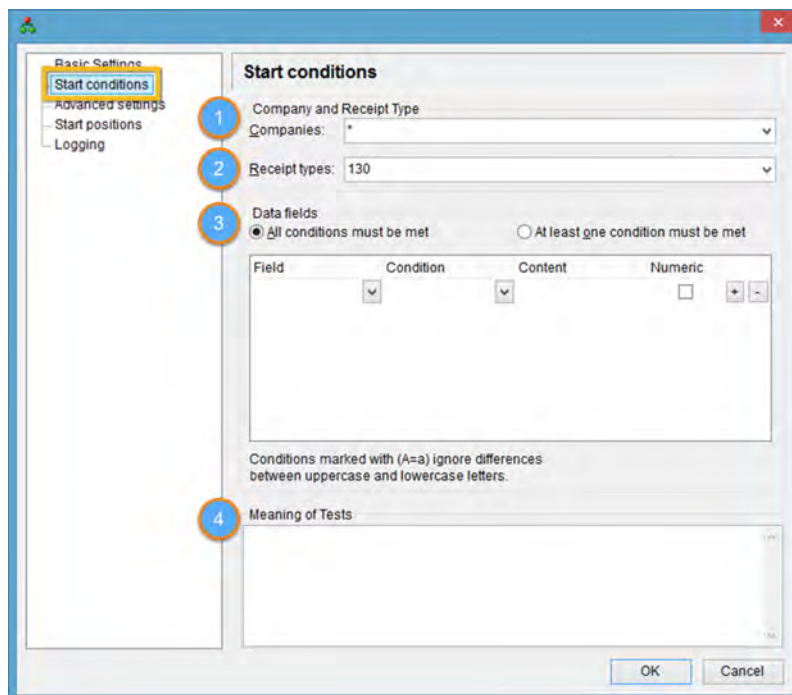
Fig. 49: WF start conditions

1   *"Companies"*
2   *"Document types"*
3   *"Data fields"*
4   *"Meaning of the operations"*

"Companies"	This can be restricted to Companies/Clients level
"Document types"	As the minimum criterion, a restriction based on the *"Document type"* is required. If there is no document type, the Start component cannot be created and an error message appears. If the workflow is to apply for all document types, this must be explicitly set.
"Data fields"	By entering conditions on the level of the *"Data fields"*, documents are only placed in the workflow or forwarded to a particular user/group or users/groups, if the criteria are met.
"Meaning of the operations"	In the *"Meaning of tests"* area, you can describe the conditions defined under (3). This is useful because users will see this description shown as a reply in their post basket when an action is to be executed which is prevented by the conditions.

"Extended settings"
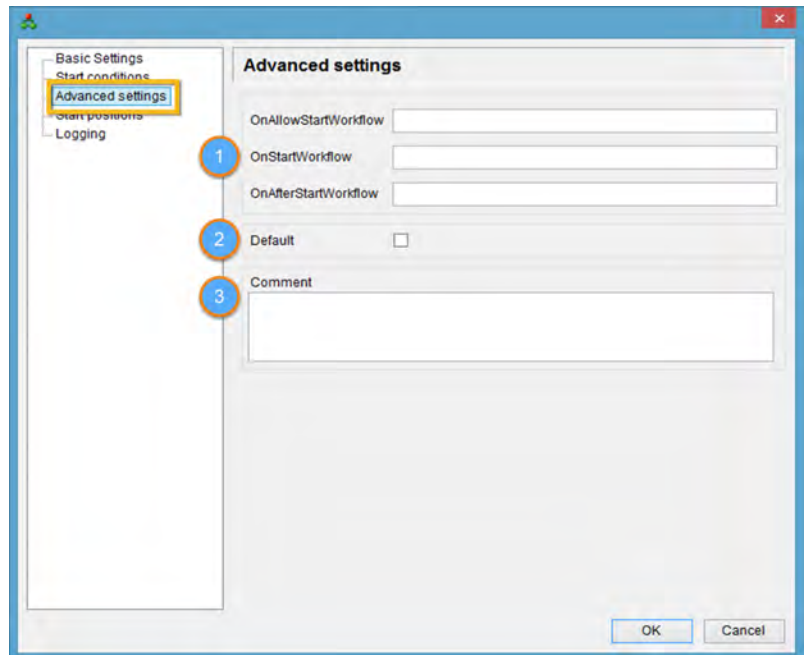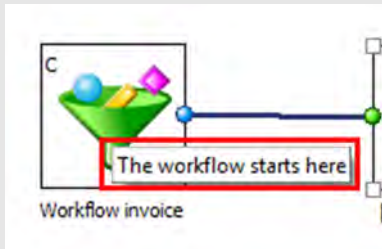
Fig. 50: WF — "extended settings"

1   Workflow script actions
2   *"Default"*
3   *"Comment"*

Workflow script actions	Defines where in the workflow script actions are to begin (scripts are customized programming).
"Default"	A workflow can be defined as *"Default"*. This is used if none of the others can be used, because, for example, the conditions are not met.
"Comment"	The information entered here is displayed as a *"hint"* when the cursor is on the Start field in the workspace:

"Start positions"
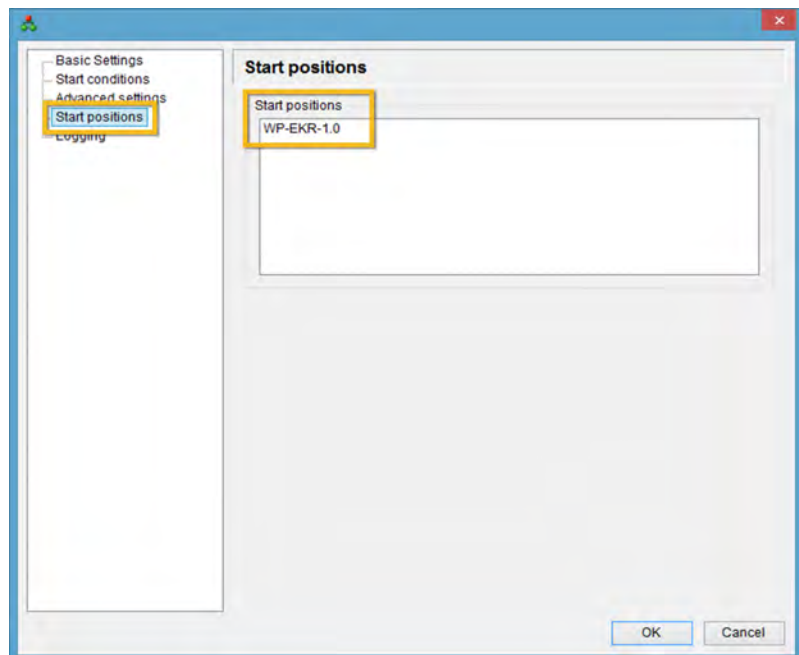
Fig. 51: WF — "Start position"

The steps which are executed at the current workflow position (in this case: "" Start) are documented under Start position.

These entries are filled in automatically provided that the other positions in the workflow have been configured.

"Logging"
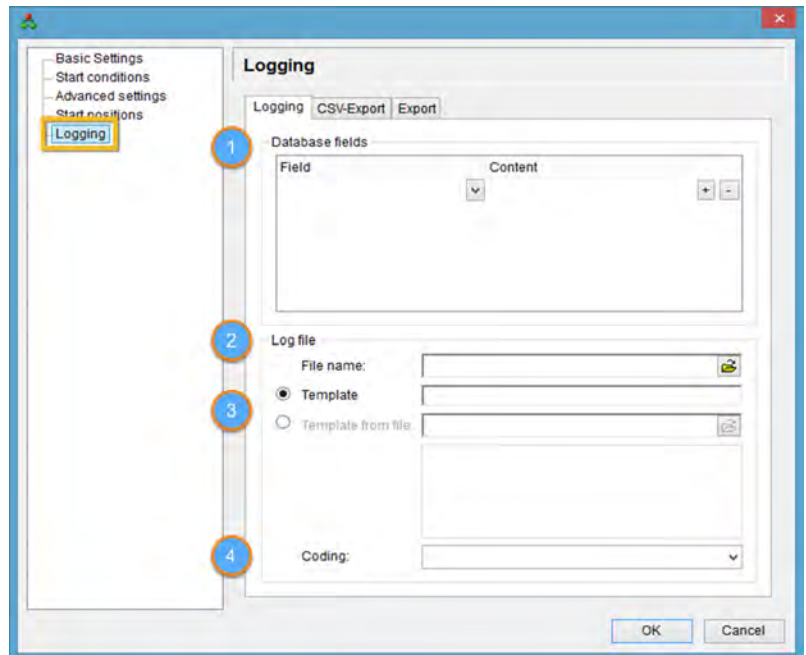
Fig. 52: WF — Logging

1   *"Database fields"*
2   *"Log file"*
3   *"File name"* / *"Template"* / *"Template from file"*
4   *"Coding"*

"Database fields"	At the start of a workflow and when executing a workflow action, *"database fields"* can be filled with values using the logging function. New field content is generated with either fixed text or text templates. With templates, not only is simple text written to fields, but partial content of another field is copied, for example, or time stamps generated.
"Log file"	Alternatively or additionally, a log file can be written.
"File name" / *"Template"* / *"Template from file"*	The file name is also a text template which, after it has been filled in, contains the name of a file which is written with information. The content of this file can be defined using either the text template created under Template or the content of the file stored in Template from file.
"Coding"	The *"Coding"* used is defined here. Permitted values for this option are Default, Ansi, OEM, ascii, UTF7, UTF8, UTF16, UTF16LE, UTF16BE and CP###, where ### stands for the number of a Windows codepage.

Define a first recipient

You now need to transfer a user or group to the workspace from the selection area on the left-hand side of the screen using drag & drop. After this, the Settings menu opens automatically.

> ❗ **NOTICE!**
> You can also select multiple recipients simultaneously as recipients in the first step. Transfer these individually to the workspace and connect each of them with the Start position.

"Basic settings"
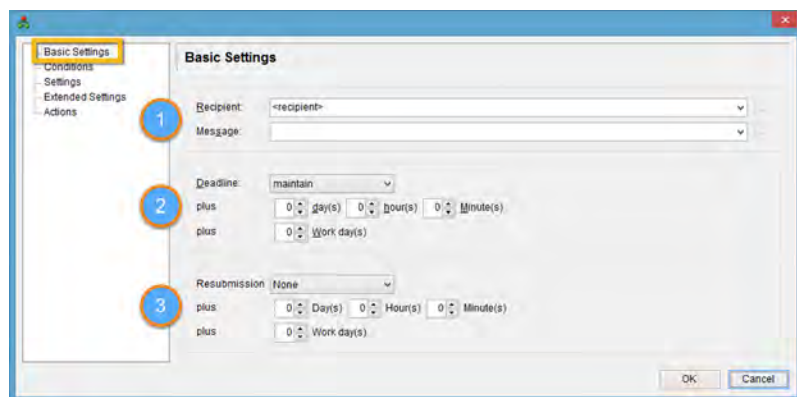
Fig. 53: WF — Recipient — "Basic settings"

1 *"Recipient"*
2 *"Deadline"*
3 *"Reminder"*

"Recipient"	The recipient selected using drag & drop is entered under *"Recipient"*. You can still edit this recipient manually here. *"Message"* contains the message text which informs the recipient about his or her task at this point in connection with the document.
"Deadline"	Under *"Deadline"*, you can define the deadline for the editor.
"Reminder"	Under *"Resubmission"*, you can directly transfer a resubmission deadline to the editor with the document. The document will only appear in the recipient's post basket for editing on the date specified here.

"Conditions"

As with the Start position of the workflow, conditions under which the document is placed in a recipient's post basket (1), and descriptions of these conditions (2), can also be defined here.
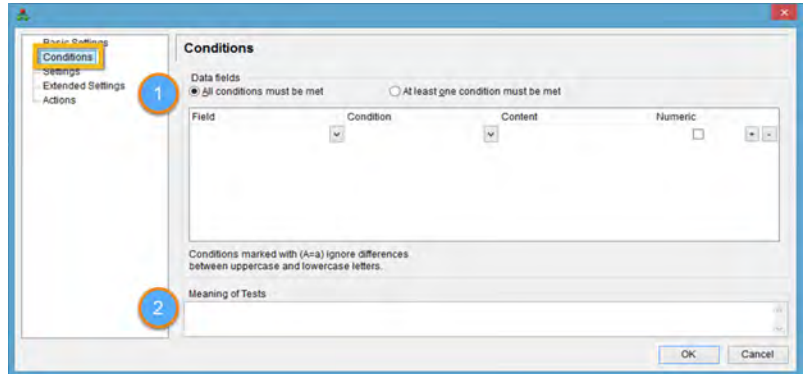
Fig. 54: WF — Recipient — Conditions

"Settings"
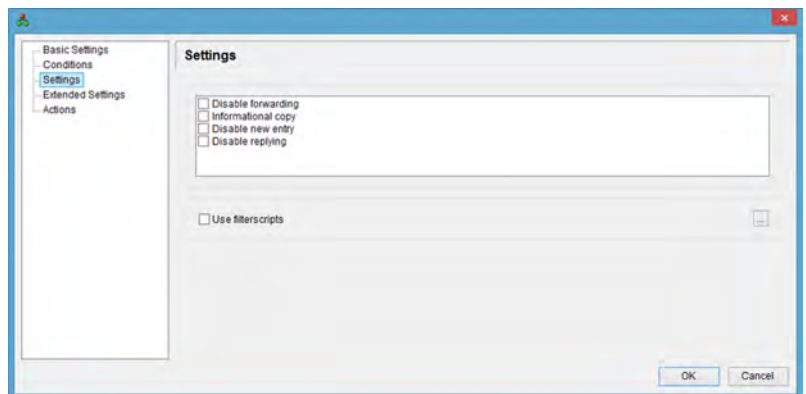
Fig. 55: WF — Recipient — Settings

By activating the individual functions, you can influence the options for further editing in various ways:

"Disable forwarding"	The user cannot forward the document. In this case, a corresponding workflow action should be available.
"E-mail notification."	The user receives a notification by e-mail.
"Informational copy"	The user only receives a copy for their information.
"Disable new entry"	The user cannot create a new entry for the document.
"Disable replying"	The user cannot send a reply to the sender via this channel. In this case, a suitable workflow action should be provided.

"Extended settings"
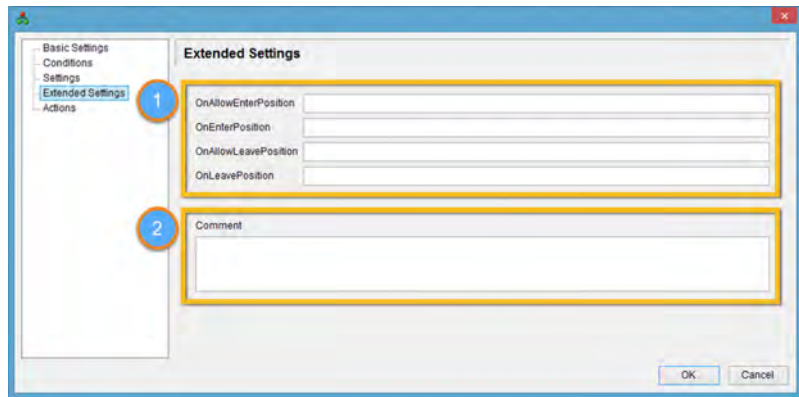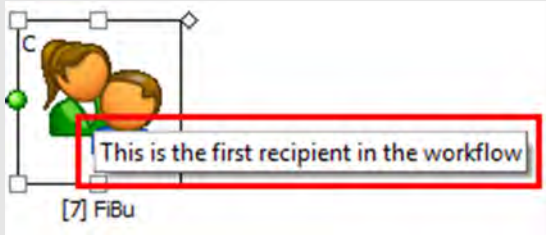
Fig. 56: WF — Recipient — Extended settings

1   Workflow script actions
2   *"Comment"*

Workflow script actions	Defines where in the workflow script actions are to begin. (Scripts are customized programming.)
"Comment"	The information entered here is displayed as a "hint" when the cursor is on the Recipient field in the workspace:

"Actions"
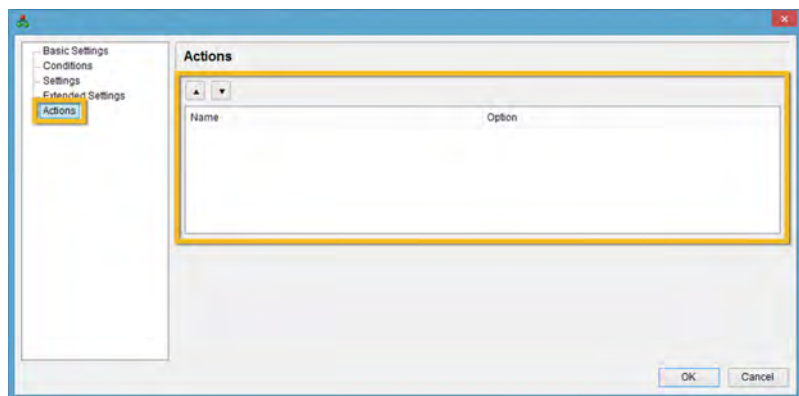
Fig. 57: WF — Recipient — Actions

The *"Actions"* option in the menu lets you change the sequence of possible actions at the next position in the workflow (see). The display is filled in automatically at this point.

Add actions

Actions control the further execution of the procedure in the workflow. Multiple actions can be stored for a procedure. Depending on the action selected, a different subsequent process can be defined.

Right-click on the workflow position/recipient and select *"New action"* to open the dialog for defining the action.

The following settings are possible here:
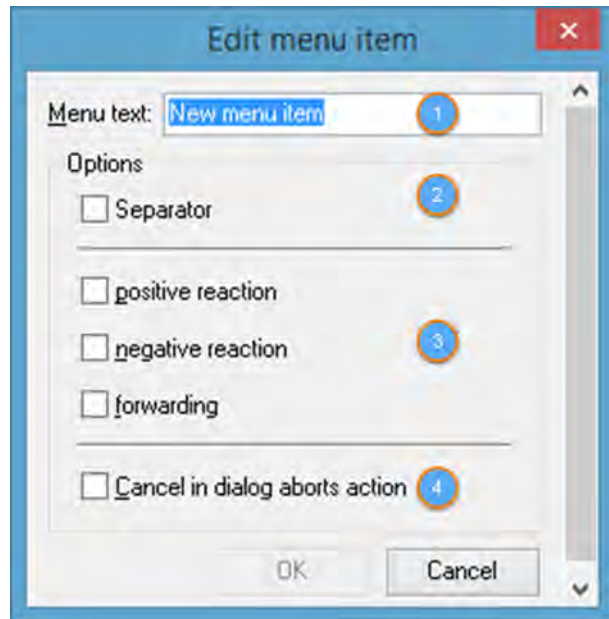
Fig. 58: WF — Recipient — New action

1   *"Menu text"*
2   *"Options" "Separator"*
3   *"Options" "Positive reaction"* / *"negative reaction"* / *" simple forwarding"*
4   *"Options" "Cancellation in dialogs ends action"*

"Menu text"	Entry of the required text. This text is displayed as a workflow action.
"Options" "Separator"	If there are multiple actions, you can add a *"Separator"* for a clearer overview. A dummy action is created for this with the aid of this option.
"Options" "Positive reaction" / *"negative reaction"* / *" simple forwarding"*	Here you can specify whether it is a positive action, a negative action, or simple forwarding. This will be documented accordingly in the post basket history. You must choose one of the three options.
"Options" "Cancellation in dialogs ends action"	If a dialog box appears after this action, by setting this option you can abort the continuation of the whole workflow with the aid of the dialog box.

Explanation: A dialog box is an additional window which opens, for example in order to select a recipient or enter text.

This dialog box has a *[Cancel]* button. If you click this button, the workflow action will be canceled. If a second action is executed in parallel for which there is no dialog box, this action will then also not be executed. This behavior is usually expected. When a user clicks *[Cancel]* in a dialog, then the expected behavior is mostly that all actions will be canceled. This is the standard behavior. If a new action is created, the option *"Cancel in dialog aborts action"* is automatically checked when saving.

If you do not want this behavior, you need to remove the (automatically added) check next to this option after saving. Then the other actions, which may be being executed in the background without any dialogs appearing, will still be continued, despite the fact that you clicked *[Cancel]* in the dialog box. In this case, therefore, only the specific part of the workflow action for which the dialog box was shown will be aborted. The other workflow actions will still be executed.

Practical example:

Purchase invoices are always sent to the Accounts department for posting and in most cases also sent to the member of staff concerned for their information. There is a fixed configuration for the Accounts department and the workflow action can be executed without a dialog box. The member of staff always has to be selected manually from a list. If no one is to be informed about this invoice, the Accounts department still needs to receive the document for posting.

Canceling the dialog for the member of staff should not therefore lead to no action being executed. Only the information, i.e. this specific part of the workflow action, is to be canceled. Then the check must be removed here subsequently. Otherwise the Accounts department would not receive the document if you click *[Cancel]* when selecting the member of staff.

> **!** **NOTICE!**
> If the next workflow recipient is determined via a script, then the configuration is set up so that, in the vast majority of cases, the check must be removed here! If a workflow action, the recipient of which is determined via a script, cannot be executed, then this check was presumably not removed again.

Further positions

Depending on the selected action, the corresponding next *"workflow positions"* *"/recipients"* and *"actions"* can be added according to steps 3 and 4. Various messages can then be transferred for these. The recipient is thus informed about his or her task with regard to the procedure. Different further positions and branches are possible.

Connect positions

Each action must always be connected to a workflow position/ recipient by a connecting line ●───────● . The connecting line can either be dragged across from the Connections area or is automatically attached to the new action if you right-click from the small square next to the action to which the connecting line needs to be attached.&
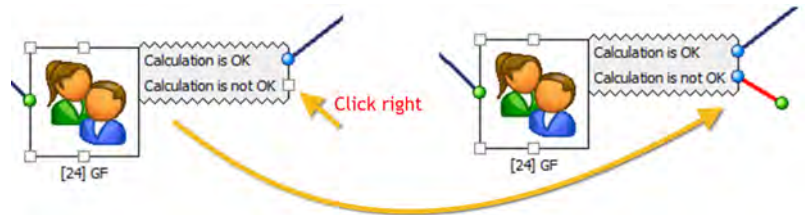

Fig. 59: Adding new connecting lines

The connecting line has two different colored dots at the start and finish. The starting point is blue and must always be attached to a workflow action or the workflow start point. The green point is the end point of the connecting line and must be attached to a recipient, a placeholder or the end of a workflow. It does not matter which square is used on the placeholder or the recipient. The different colors of the points are simply for a clearer display.

End of a workflow

A workflow must always be ended with the position <end>.

Save and check

The changes are saved under *"File ➜ Save"* . Before saving the workflow, a check is performed to determine whether all connections have been set up correctly and whether all the required positions (start, end etc.) have been included in the workflow.

If information is missing, a message will appear. The workflow will not be saved if it contains (technical) errors.

A typical workflow might be structured as follows:
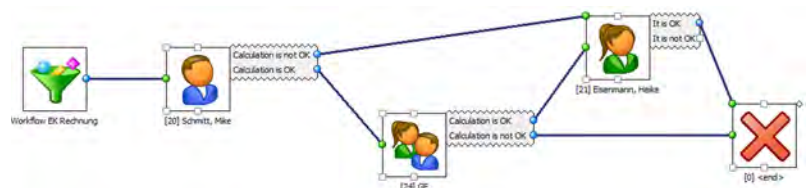
Fig. 60: Workflow process

2.2.1.3   Absence and representatives

Here you can specify representatives for a defined time period for each user. This is required so that a person's post basket entries won't be neglected in case of absence and can instead be processed by a representative.

2.2.2   Capture programs

This is where connections to the capture programs are stored, which can be started from the Administration.

Other programs can be stored here as needed.

2.2.3   Find & manage

This is where a connection to retrieval is stored, which can be started from the administration.

Other programs can be stored here as needed.

2.2.4   Tools

2.2.4.1   Error logs

2.2.4.1.1   General

When the document management system is launched, particularly in combination with the *"COLD"* and *"AUTOINDEX"* modules, lots of rules are agreed, set up and activated.

Most of these rules are the result of system specification and/or organizational discussions. Errors can occur due to unknown processes during archiving or if there are differences from defined processes. To edit errors, use the error logs (program HpHab755), consisting of the *"List of missing host data"* and the *"List of documents not yet scanned"*.

"List of missing host data"

The *"list of missing host data"* lists the procedures for which no data from another system, such as ERP, financial accounting etc., is available for indexing the documents.

"List of documents not yet scanned"

The *"list of documents not yet scanned"* contains procedures for which these external systems have supplied host data, but for which there are not yet any scanned documents or archived procedures.

Terms

"Host data" is data provided by another system (e.g. ERP, financial accounting, personnel etc. or consignment data from a freight forwarding association). Host data is also called index data.

"Merging" means combining the index data with the associated document. Unique criteria are assigned to this which are in the index file and attributed to the document (e.g. company, document type, barcode).

2.2.4.1.2 Program layout

For editing the error logs, a program is provided that includes both lists. You can start this program in the *"HABEL Administration"* (✎ *Chapter 2 "HABEL Administration" on page 6*) under Tools — Error logs. After you start the program, you can use a selection box to define which of the two lists is to be edited currently.
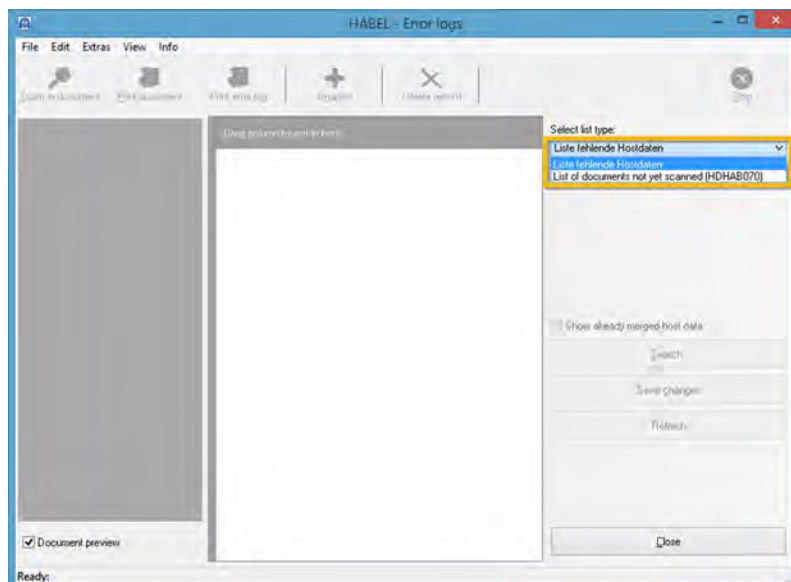
Fig. 61: "Error log ➔ Program layout"

Fig. 62: "Error log ➔ Search criteria"

Select the list. You can then pre-allocate various search criteria for which incorrect entries are to be checked (e.g. different companies or individual document types and dates of scanning). When you click the *[Search]* button, the corresponding data is displayed in the window.

Overview: buttons and their equivalents in the menu

Fig. 63: Error log — Button

Item no.	Meaning	Explanation	Menu selection	Function key
1	Zoom in document	The document is displayed in full screen mode. To close this preview, click *[X]*.	*"View ➔ Zoom in document"*	*[F11]*
2	Print document	Prints the document.	*"File ➔ Print ➔ Print document"*	*[Ctrl] + [D]*
3	Print error log	Prints the list (not the associated documents).	*"File ➔ Print ➔ Print error log"*	*[Ctrl] + [L]*
4	Analysis	Starts the analysis (more detailed information on this later).	*"Edit ➔ Analysis"*	*[Ctrl] + [W]*
5	Delete record	Deletes the highlighted record from the error log (document is retained in the archive).* Note: The hitlist is refreshed after the end of the delete procedure.	*"Edit ➔ Delete record"*	*[Ctrl] + [R]*

> **! NOTICE!**
> Zoom in document and Print document are not available for the list of documents not yet scanned, as there is no document in this case.

* If entries are deleted from the list of documents not yet scanned, a prompt will appear asking whether the entry is to be completely deleted and therefore not available for further merge processes or just marked as merged.
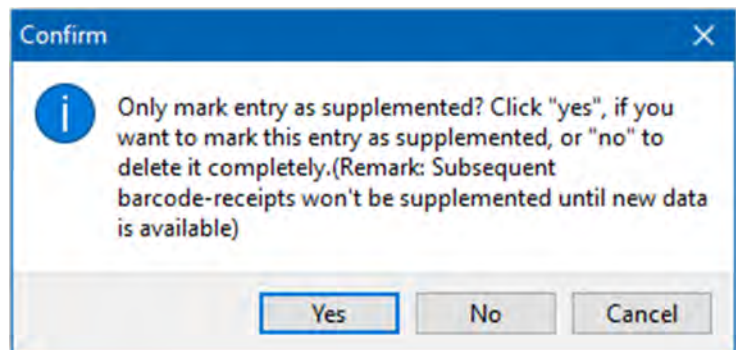
Fig. 64: "Error log ➔ Confirmation"

Additional commands which can be accessed via the menu:

"File ➜ New instance"	Use this command to open another instance of the program, for example in order to call up additional error logs in parallel.
"Extras *➜ Export to HTML"*	Use this command to export the table displayed in the error log to HTML.
"View ➜ Columns"	Use this command to transfer additional columns to the error log.
"View *➜ Optimal column width"*	Use this command to adjust the hit-list.
"Edit ➜ Stop"	Use this command to stop queries (e.g. analyses) that last for a long time. This command is only active if stopping is possible.

2.2.4.1.3 List of missing host data

To edit the *"List of missing host data"*, activate the document pre-view (1). The document will then be displayed for every selected procedure (2).
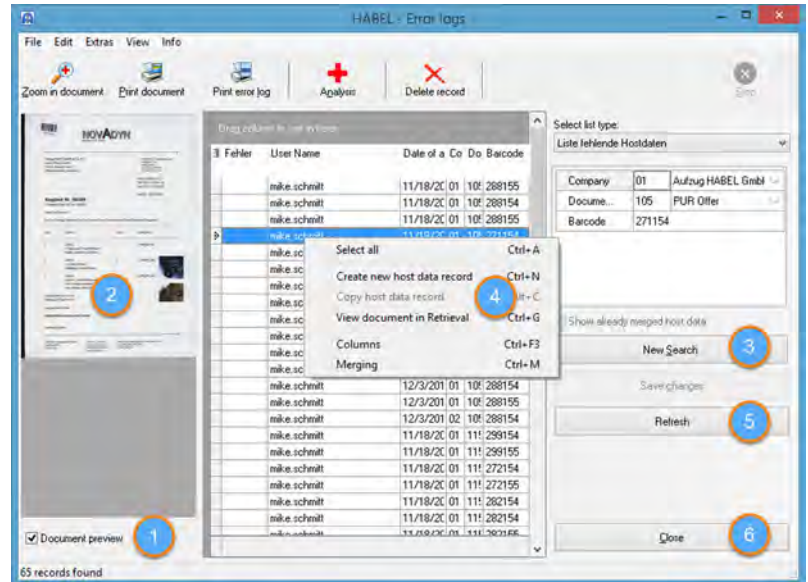
Fig. 65: "List of missing host data"

If you click the *[New search]* button (3), the entered criteria will be cleared. This command can also be accessed with *"Edit ➔ New search"* or by using the key combination *[Ctrl] + [S]*.

If you are using the separate module *"HABEL CONNECTION"*, you can use the context menu (right-click on the hitlist entry) (4) to display the document directly in the retrieval or to access the column selection.

If you have made changes, the *[Refresh]*(5) button will be available. This rearranges the list. Use the *[Close]* (6) button to exit the program. Alternatively, select *"File ➔ Close"* or the *[X]* symbol.

Group and sort error log

You can group the hitlist by dragging the required fields into the *"grouping field"* above the columns. In the course of this, you can also group according to multiple fields. For example, procedures consisting of multiple pages can also be grouped for a clearer overview.

Click on a column to sort by this column. The sorting direction is shown by the triangle on the column heading.

Fig. 66: Grouping according to document type

Analysis

When you click the *[Analysis]* button (1), proposals for solutions will be shown for each highlighted row. These are marked in color (2) according to the error and described in more detail in an information window (3).
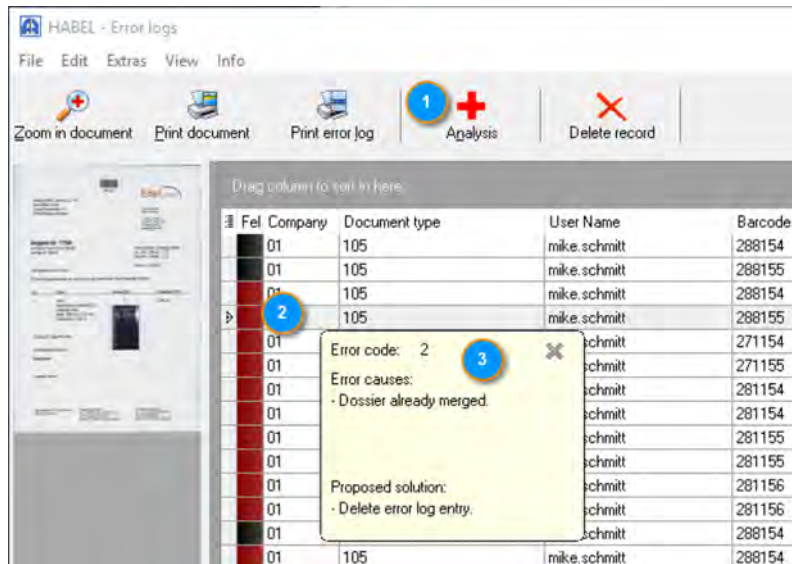
Fig. 67: "Error logs ➔ Analysis"

By default, the following error codes are set. You can customize the colored marking by selecting *"Extras ➔ Adjust color"* or the key combination *[Ctrl] + [Q]*.
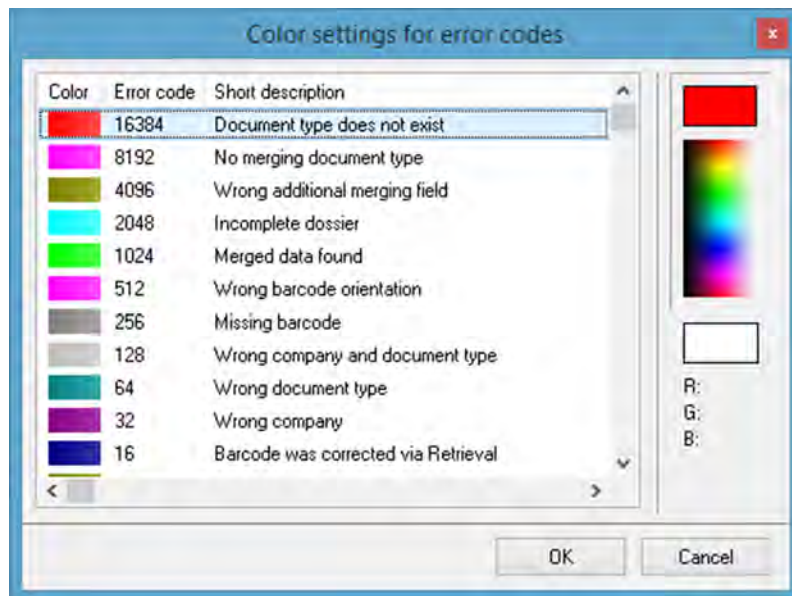
Fig. 68: "Error logs ➔ Extras ➔ Adjust color"

Check the errors and the proposals for solutions. The program suggests a correction for the following error codes:

512 - Wrong barcode orientation

128 - Wrong company and document type

64   - Wrong document type

32   - Wrong company

The following example describes the error code 64
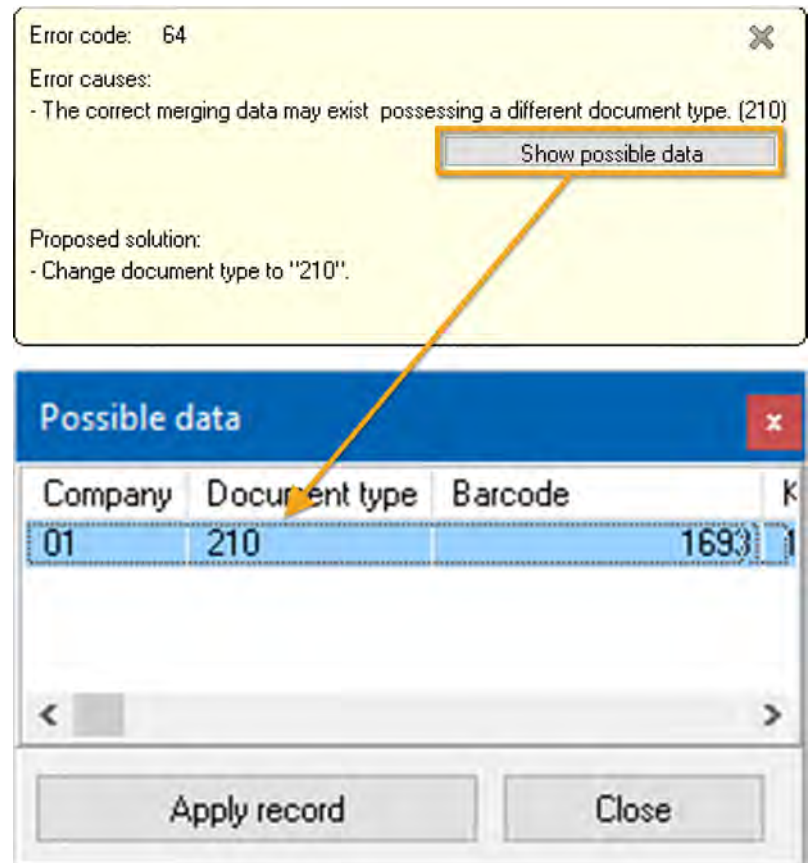
Fig. 69: Error logs — Example of error code

Make corrections in the error log

In the case of merged data which cannot be assigned to the document due to, for example, an incorrect barcode no., you can correct this directly in the error log.
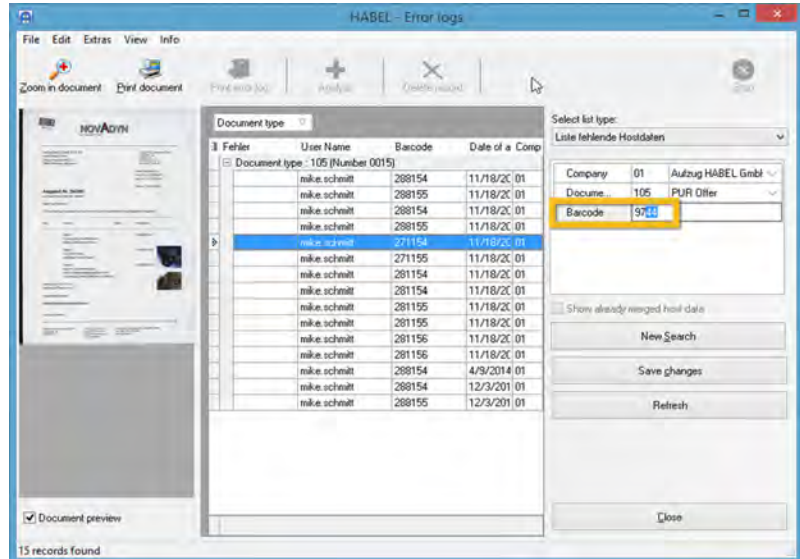
Fig. 70: Error log — Corrections

Fig. 71: Revise an existing entry

Click in the corresponding field in the area on the right to edit it. Please note that only the entry in the highlighted row will be changed.

To change the whole procedure, for example all pages of the document, proceed as follows:
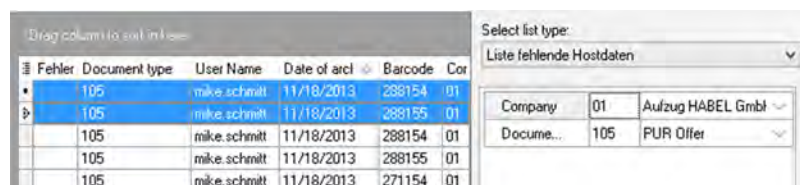
Fig. 72: Error log — Corrections 2

1. ▸ Highlight all the rows that belong together by clicking on them while holding down the *[Ctrl]* key.

2. ▸ Apply the changes by clicking the *[Save changes]* button. Alternatively, select *"Edit* ➜ *Save changes"* in the menu. Or use the key combination *[Ctrl] + [E]*.

Merge manually

To link the data together and categorize the correction in the error log as correct, start the merge process manually.

In the menu bar, select the entry *"Extras ➔ Merge"*. Alternatively, you can use the key combination *[Ctrl] + [M]* or the *"context menu"*. Right-click on the entry and select *"Merge"*. The data will then be merged with the aid of the transfer program. As a result, the entry is now no longer in the error log.

The error code *"1024 Merged data found"* is also corrected when you start the merge manually.

Create new host data record

For procedures for which no host data is provided, you can create a new host data record.

This can be done with the menu under *"Edit ➔ Create new host data record"* or the key combination *[Ctrl] + [N]* or the *"context menu"*. A separate capture mask opens. You can enter all *"search terms"* in this mask and assign them to the document using the identical *"barcode number"*.
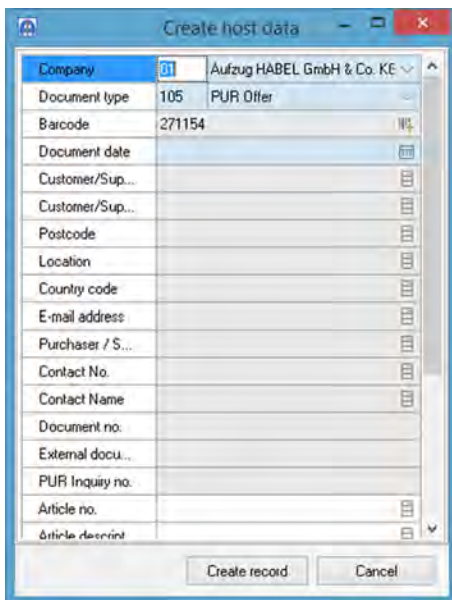
When creating the host data record, the system checks whether the host data already exists in this combination. If this is the case, you will see an error message.

The host data record that you have created is listed in the *"List of documents not yet scanned"*. Now perform the *"manual merge"* as previously described. The host data record will be linked to the matching document. After merging, refresh the list with the *[Refresh]* button.

Fig. 73: Error log — New host data record

2.2.4.1.4   List of documents not yet scanned

In the list of documents not yet scanned, you can filter according to selected criteria or display all data. The hitlist shows all *"host data"* which has been transferred from other systems and to which no document can be assigned.
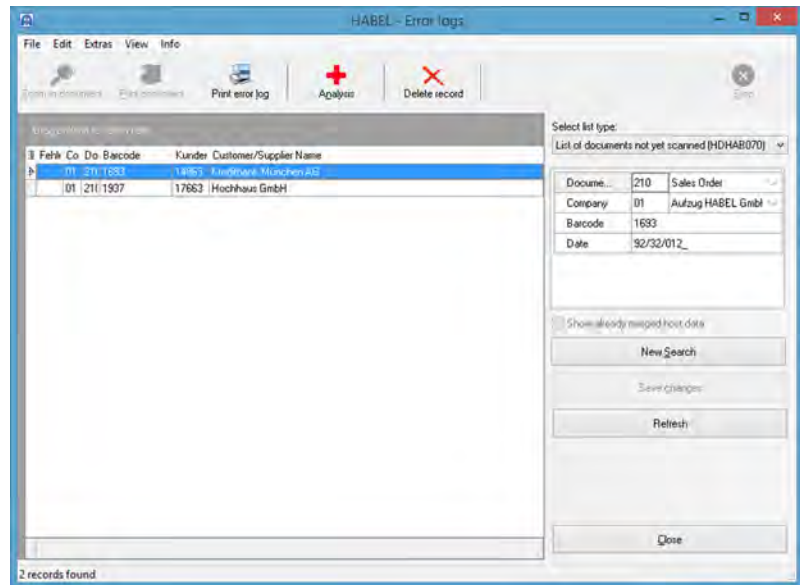
Fig. 74: HABEL Administration

You can also display procedures which have already been merged. To do this, check the *"Show already merged host data"* checkbox (1) before starting the search.

Copy host data records

In this list, you can also copy host data records which can be used for documents that are not in the *"List of missing host data"*. This can be done with the menu under *"Edit ➔ Copy host data record"*. Alternatively, you can use the key combination *[Ctrl] + [C]* or open the *"context menu"* by right-clicking on the relevant entry.

The following capture mask appears. It is already filled with the data that corresponds to the selected record.
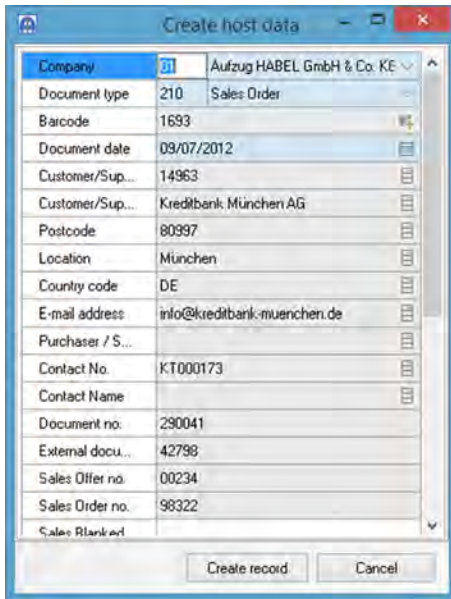
If you do not want to transfer all this data, you need to make changes in the *"Create host data"* capture mask.

After creating the record, you can find it in the *"List of documents not yet scanned"*.

During the *"manual merge"*, it is linked to the matching document using the barcode number.

Fig. 75: Error log — Copy host data record

Analysis (only if using SQL database)

When you click the *[Analysis]* button, proposals for solutions are shown for the highlighted rows. Depending on the error, these are marked in color and described in more detail in an information window. The familiar error codes from the *"List of missing host data"* are shown here (apart from the codes which are due to the changes in the retrieval). There is also the additional error code 0 *"Error unknown"* (e.g. the procedure is not present or the document still needs to be scanned).

2.2.4.2   HABEL MASK EDITOR

2.2.4.2.1   General

The layout of a retrieval, capture or post basket mask is customized to your specifications. If changes need to be made later, this can be done with a commensurate amount of effort. HABEL provides configuration files for this which you can familiarize yourself with and learn to edit by completing the administrator training. With the program *"HABEL MASK EDITOR"*, you can make many of these changes with a graphical user interface.

These include:

- Activate/deactivate database fields
- Create new database fields
- Define the sequence of the database fields
- Define mandatory field/modifiable field/item field
- Properties of the database fields

! NOTICE!

The *"HABEL MASK EDITOR"* is a graphical user interface for making modifications. There are no plausibility checks to determine whether the changes made will bring about the need for further modifications. Changes made to masks or databases, for example, which are not performed completely/correctly taking into account further modifications which may be required, may therefore lead to the system no longer functioning correctly.

To use the *"HABEL MASK EDITOR"*, it is therefore necessary to complete the administrator training at HABEL. Once you understand the processes which effect changes, you can use this program as a convenient tool.

Changes to the system made with the *"HABEL MASK EDITOR"* can be performed while the system is live. To start the *"HABEL MASK EDITOR"*, you need the program *"HpHab882"*.

You can also start the Mask editor with the following symbol.

Maskeditor

2.2.4.2.2 Program layout

When you start the *"HABEL MASK EDITOR"*, it is initially empty.
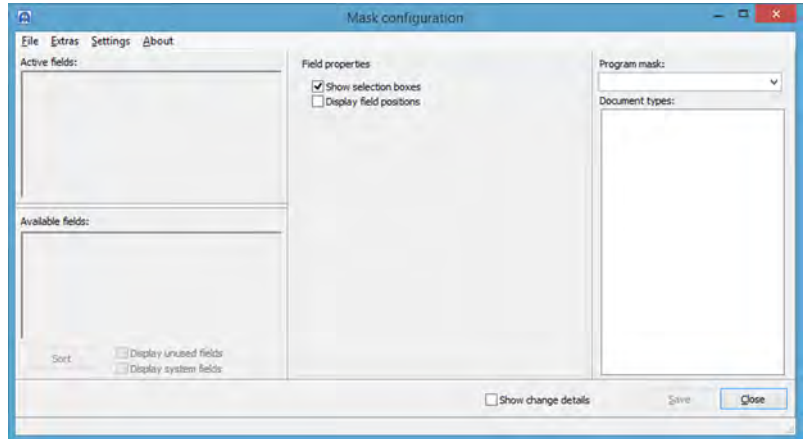
Fig. 76: Mask editor

The first step is to select the mask to be edited. This is done using the *"Program mask"* selection box on the right.

Fig. 77: Mask editor — Selection box — Program mask

Select the mask to be edited here. Generally, the masks in HABEL should be treated separately from each other, so that each mask can be different from the others. If you make changes that you also want to apply to other masks, you must transfer these changes. After selecting the program mask, you will see the document types which have been activated for this program displayed in the column underneath.
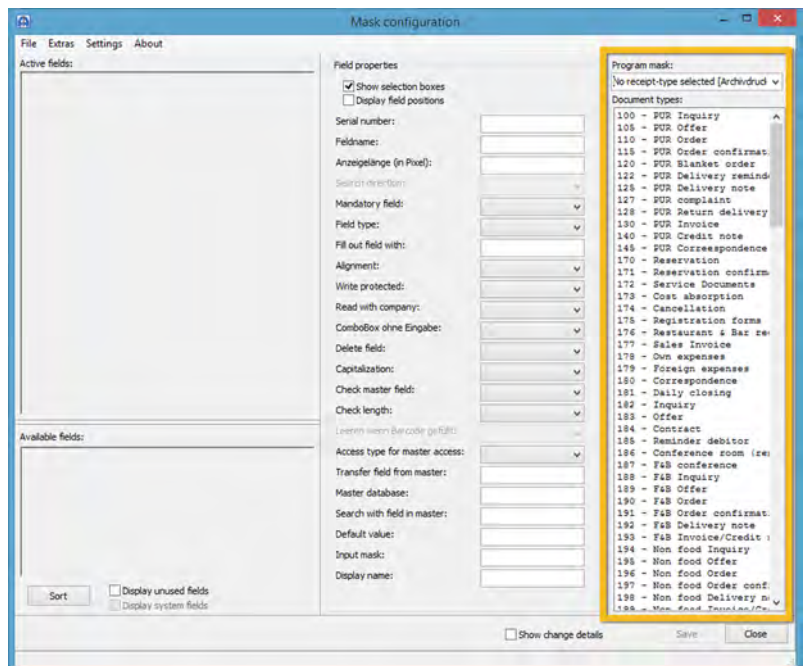
Fig. 78: Mask editor — Document types

When you select a document type, the fields which are active and available for this document type are shown in the area on the left of the *"HABEL MASK EDITOR"*.
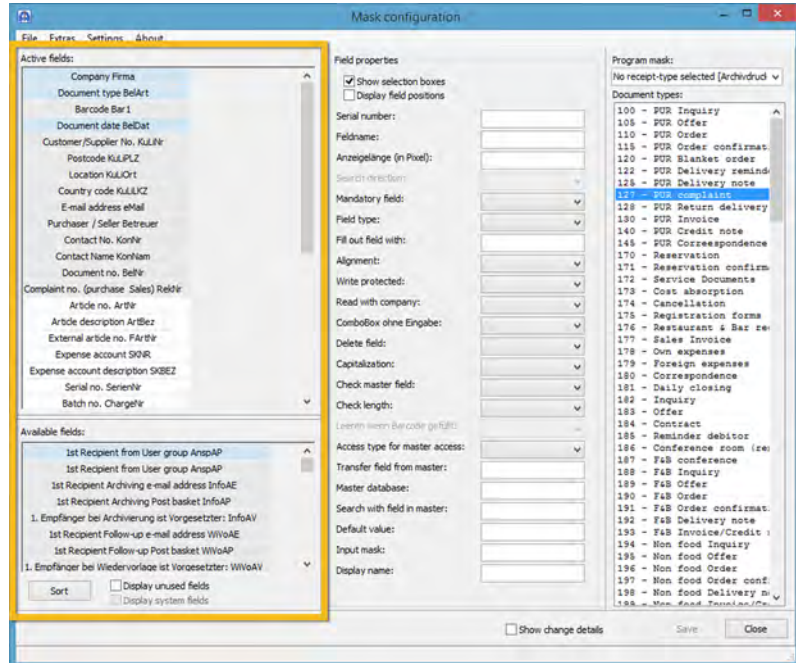
Fig. 79: Mask editor — Document type fields

> **!** **NOTICE!**
>
> White fields (normal modifiable fields), gray fields (obligatory fields), light blue fields (position fields), blue fields (obligatory item fields).
>
> If you then click on a field, the area in the middle will be filled with the field properties.
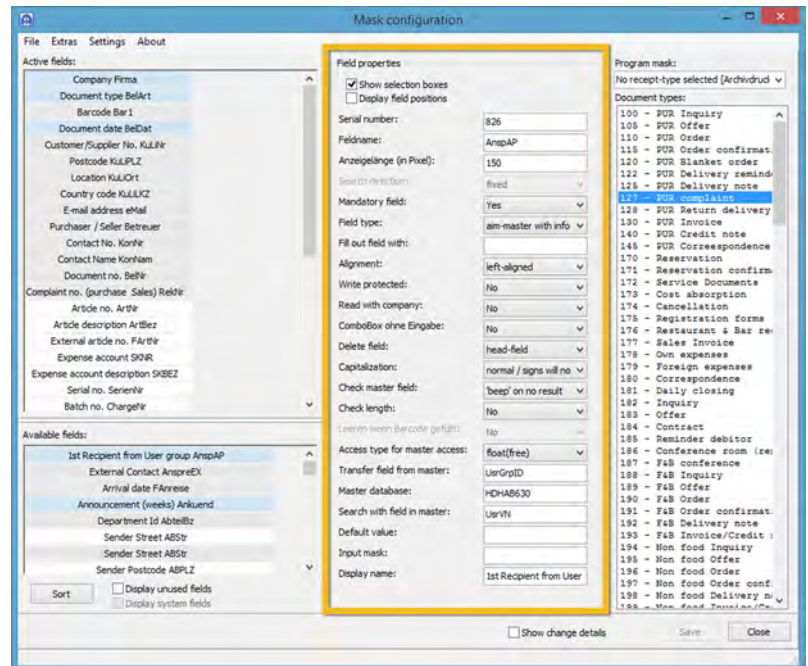
Fig. 80: Mask editor — Field properties

2.2.4.2.3   Menu bar

"File ➤ Save"	This command saves the changes you have made. Alternatively, you can also use a button in the footer.
"File ➤ Close"	This command closes the *"HABEL MASK EDITOR"*. If you have not saved your changes, they will not be applied. You can also close the program with the *[Close]* button in the footer or the *[X]* at the top right of the mask.
"Extras *➤ Document type administration"*	This starts the *"Document type administration"*, which includes assignment of the document types to the clients, document groups and masks. For details, see ✄ *Chapter 2.2.4.2.7 "Document type administration" on page 93*.

"Extras
➜ Document group overview"
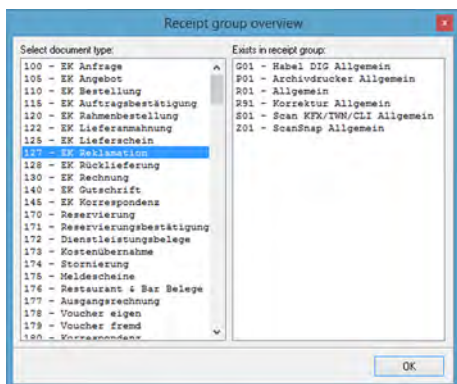
Overview of which document type is assigned to which document group. What is a document group? A document group is a grouping of similar document types. There are document groups for the retrieval, capture programs etc. Various program functions can be linked to the document group. This usually follows from the document group name (e.g. Retrieval Personnel Correction). Also available in the context menu in the program mask selection.

Fig. 81: "Document group overview"

"Extras
➜ Generate new program mask from capture mask"

With this command, new masks can be generated from existing capture masks. Important: With the menu *"Settings*
➜ *Default values for new fields"* you can define the field properties of a new mask. If a new program mask is created from a capture mask, you should ensure that the data stored here is meaningful. For example, there are mandatory fields in the capture mask which make little sense in a retrieval mask. For details, see ✎ *Chapter 2.2.4.2.8 "Create or copy masks" on page 96*

"Extras **➜** *Copy masks to"*

This command is used to copy any masks to other masks (e.g. after changing the retrieval masks, these can also be transferred to the capture masks or post basket masks).

"Extras **➜** *Restore"*

Every change in the *"HABEL MASK EDITOR"* is backed up. Use the *"Restore"* option to reset the changes accordingly. You will see a prompt asking you which of the backups you want to use for the restore.
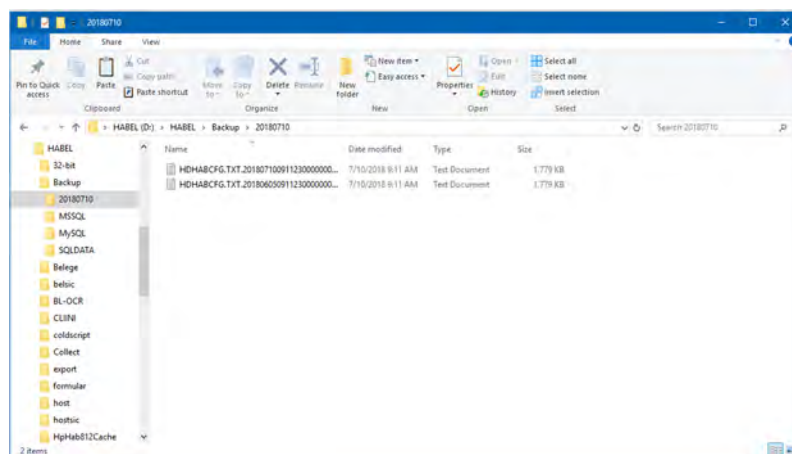
Fig. 82: Mask editor — Restore backup

"Extras ➜ ***Create new database fields"***	With this option, you can create new fields (i.e. search criteria) for the database (provided that you have MySQL and/or MS SQL database). For details, see ↳ *Chapter 2.2.4.2.5 "Create new data-base fields" on page 90*.
"Settings ➜ ***Ask about comprehensive changes each time"***	The term comprehensive changes refers to changes that might be applied to other masks or document types. If you activate *"Ask about comprehensive changes each time"* (check in front of the menu item), the other commands *"Always for all document types"*, *"Always for other masks"* and *"Save last mask selection and do not ask again"* will be grayed out and can no longer be selected. For every comprehensive change, you will now be asked whether these changes are also to be applied to other document types or masks. If this command is not activated, the following three commands can be used.
"Settings ➜ ***Always for all document types"***	All comprehensive changes such as adding of previously inactive fields are applied for all document types. Important: If this function is active, these changes will be applied for all document types without a further prompt.
"Settings ➜ ***Always for other masks"***	All comprehensive changes such as activation of mandatory fields are applied to all masks. Important: If you have activated this function, these changes will be applied for all document types without a further prompt.
"Settings ➜ ***Save last mask selection and do not ask again"***	The last selection made after the prompt will be applied in future without a further prompt.

"Settings
➔ *Default values for new fields"*

Fig. 83: Default values for new fields
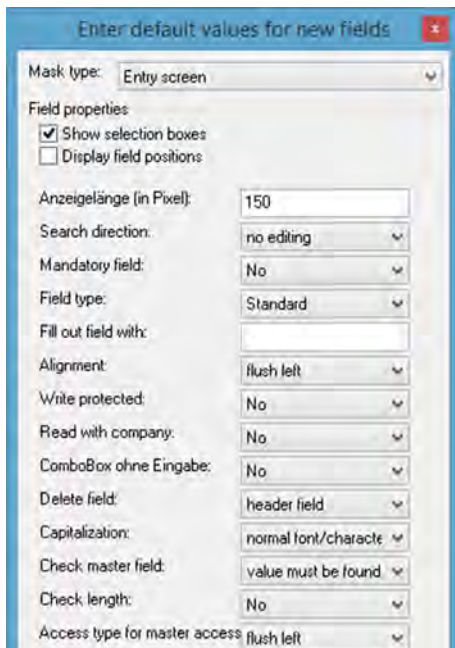
If you frequently use the same values for new database fields, you can store default values which will be used when creating new fields. To do this, use the command *"Default values"* for new fields when storing the required definitions. If you create program masks from capture masks by selecting *"Extras*
➔ *Generate new program mask from capture mask"* it is essential that the correct data for retrieval masks is pre-allocated here (mandatory field: No etc.).

2.2.4.2.4 Manage search criteria (database fields)

The *"HABEL MASK EDITOR"* offers a wide range of options for activating existing fields within the document types, making changes relating to mandatory/modifiable fields etc. and creating new fields.

Once you have selected the program mask and selected the document type within this mask, the active and available fields are shown in the area on the left.
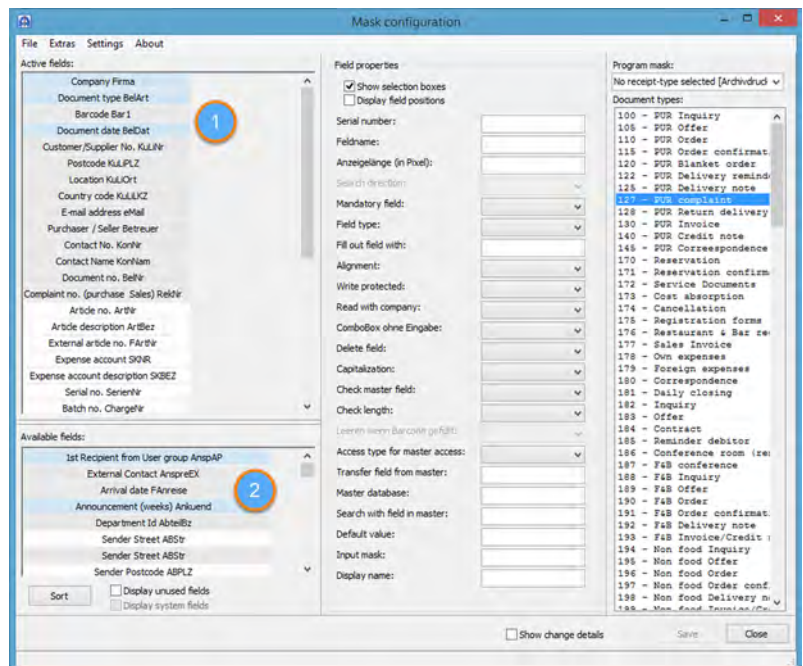
Fig. 84: Mask editor — Manage search criteria

If fields have a white background by default, they are optional fields. These fields do not have to be filled in and are not essential for saving the document. If fields have a light blue background by default, they are optional fields with item capture. A procedure often has multiple article numbers, project numbers or customers, for example. Item capture allows multiple assignment of values to fields in this case.

If fields have a gray background by default, they are required fields. If a value is not entered in one of these required fields, the document cannot be saved and archived. If fields have a blue background by default, they are required fields with item capture.

All database fields which have not been used for this document type before, but are available for use in the database, are listed under Available fields (2).
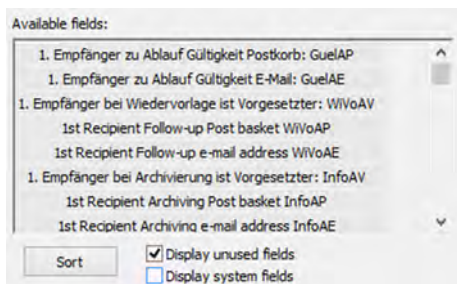
Fig. 85: "Display unused fields"

Fig. 86: Sort fields

If there are fields in the database which have not previously been used in a mask, these are unused fields. You can display these by checking *"Display unused fields"*.

The command *"Display system fields"* also becomes active. The term system fields refers to fields which are not intended for the search itself, but which are important for internal purposes. These fields are shown with a light-gray font in the *"Available fields"* box.

To transfer database fields from the *"Available fields"* box to the *"Active fields"* box, drag the available fields to the active fields using drag & drop. This activates them for the document type in question. Active fields can also be hidden and rendered not active for use by dragging them back into the *"Available fields"* box.

After saving the change, you can also change the sequence of the fields. To do this, press the *[Sort]* button. Now set the sequence in the selection box.
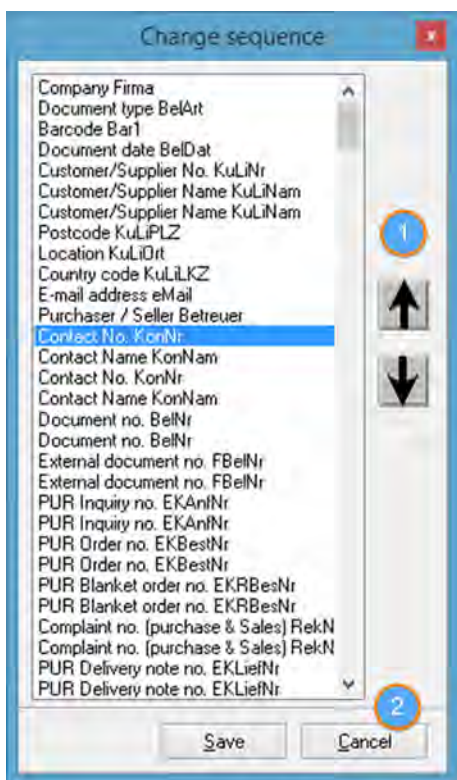
The field sequence set in this box is the default sequence for the mask. Any user can set their own field sequence within the mask. You can make these changes in the relevant mask, e.g. retrieval mask, capture mask etc. on a user-dependent basis. You can also hide fields not used by the user on a custom basis.

To move fields for the default mask to another place, use the *"Sort"* command in the *"HABEL MASK EDITOR"*.

First, click on the field to select it. You can then move it with the up/down arrows (1).

Click *[Save]* to apply the changes. Click *[Cancel]* if you want to exit the box without making any changes (2).

Fig. 87: Fields — Properties

To make your own changes to a database field, various options are available under *"Field properties"*.

The field properties in the *"HABEL MASK EDITOR"* only become active when you click on a field in the *"Active fields"* or *"Available fields"* box. You can also define the view of the field properties here. These can be displayed with or without selection boxes. Alternatively, the *"field positions"* can also be displayed with or without selection boxes.

Fig. 88: Internal field positions of the field properties to be used

To work without selection boxes and/or with field positions, you should be familiar with the current administration of the search criteria. You will see a view of the *"field properties"* in the form of numeric abbreviations and parameters.

The functions of the individual *"field properties"* are described in part in the table below.

Serial number   The position of this database field.

Field name   Internal name of the field.

Display length (in pixel)   The display length of the field in pixels for fields which cannot be moved (1 character equals approx. 8 pixels).

Search direction

"Fixed or float (free)"	The value must exactly match the term being searched for (fixed), or it is sufficient if only parts of the database field content match the term being searched for.
*"*SQL search *"*	The symbol * is added before and after the entered value, which triggers a float search in SQL databases.
"Write protected"	No longer active.
"Info field"	Defines that this field is to be used as an information field. Information fields are shown as a note on the document and can be changed by users in information mode with the *[Change]* button (without the need for the *"HABEL CORRECT"* module).

Mandatory field

Defines whether the field is to be a mandatory field.

"Yes"	The field can be exited without entering data, but it is not possible to save unless data is entered in it.
"Yes, with check"	The field cannot be exited without entering data.

Field type   Defines the field type.

"Default"	Free entry of individual numbers, letters, words etc.
"ComboBox"	Defines the field as a selection box with pre-defined terms.
"Info field"	No longer active.
"Edit field"	No longer active.
"Date field"	Date information can be entered in this field. A period . must be entered as the separator between the day/month/year. Symbols such as ., +1, -10 etc. can also be used. The field is formatted as e.g. MM.DD.YYYY.
"Date without mask"	Unformatted field with the option of entering a date.
*"Additional info with hitlist *"*	Access to index master data with hitlist.
*"Field with info file *"*	Access to index master data without hitlist.
"ComboBox with capture file"	Defines the field as a field with a selection box as well as the option of free entry.
"Field with info file + combined key"	Access to index master data without hitlist, but also to another key (example: the company and name from the index master data are taken into account for the result).
"Boolean field"	Option to set whether it is a field with a *"Yes"* / *"No"* choice.
"Counter field"	Option to set whether it is a counter field. Within a counter field, a consecutive number is assigned using a function key or menu option, which can be used, for example, to merge host data (see Capture, The electronic barcode).
"Master data with Aimdex"	Defines this field as a field with master data access. When a value is entered in this field, data from a master database is used in order to transfer the values from there to the defined fields.

"Aim master data with info field"	Like master data with Aimdex, but a value is displayed in the field (example: *"Entry of post basket recipient's name* ➔ *Display of post basket recipient name and post basket recipient number in a split field")*.
"Difference between index master data" — *"Aimdex master data"*	With index master data, search results are case-sensitive, and the term must be entered so that it matches the hit starting from the left.

Fill out field with
Defines the character with which free spaces are to be filled out up to the end of the field (depending on the field alignment: left or right).

Alignment
Defines whether the values are to be left-aligned or right-aligned in the database fields.

Write protected
Defines whether the field content is write protected (Yes/No), so that it cannot be filled in by the user.

Read with company
For fields with master data access or ComboBox, you can define that Aimdex access is to apply. This means that when accessing, a filter with the company, or with the combined key to the company and document type, is applied.

ComboBox without entry
Defines whether the field is a one-part field (Yes) or has a split ComboBox (No) (frequent example: document type: key + name).

Delete field	Can only be defined for the fields in the capture masks.

"Header field"	The field is defined as a header field and cleared after saving the captured data.
"Item field"	The field is defined as a item field and cleared after saving the item.
"Never delete field"	The value is retained even after the captured data has been saved.

> **!** **NOTICE!**
> Default setting when creating new database fields.

Only delete after *"Save item"*	Field is cleared after saving the item, but remains filled in after saving (of the whole procedure).

Capitalization	If normal is selected, the entered characters will not be changed. For fields assigned with *"All signs upper case"*, all characters will be capitalized when they are entered. If *"All signs lower case"* is selected, the characters will be lowercase. The display depends on the definition of this field property regardless of the actual capitalization setting when the characters are entered.
Check master field	For fields for which master data access is stored, the response can be defined here. The standard setting is *"Value must be found, ignore..."* This means that the field can be exited without a value being found.
Check length	Defines whether a check needs to be performed (Yes/No) to determine whether the number of characters entered matches the length of the database field.
Access type for master access	Defines how the type of search is to be performed in the master data (fixed according to the value in the field or free according to parts of the value in the field).

Transfer field from master	Used when the value of another field from the master data is to be transferred to the search field.
	Example:
	Search in the customer numbers field with the customer name: the number is entered when the hit is selected (master data access). The value (field name from master database) which is to be written to the database field is entered here.
Master database	Defines the file name of the master file/database for master data access.
Search with field in master	Defines which field in the master database to search in with the field content entered (field name from master database must be entered).
Default value	Defines fixed values that are stored in the field, such as the current date (@Date).
Input mask	Defines the field formatting (any characters, numeric characters or separators etc.). Even if the field is not a mandatory field, you can control how this field is to be filled in.

Display name	Text which designates the field in the mask (external name).

If you activate the *"Show change details"* checkbox and click *[Save]*, you will receive information on the effects which the change would have in *"HDHABCFG"*.

You then have the opportunity to check the changes again.

Status	No	DB	Action	Status	Record		
todo	0	hd...	UPDATE	before	30900000020199900002ArtBez	131	0
				after	30900000020199900002ArtBez	131	0

Fig. 89: Show change details

You can then undo the changes (*[F6]*) or execute them (*[F9]*). If you click *[Close]*, the change will not be applied.

After saving, you will receive a *"confirmation"*.

Changes that you make to the field properties can be automatically applied for other document types and masks.

If you have activated the function *"Ask about comprehensive changes each time"* in the *"Settings"* menu, the following prompt will appear:
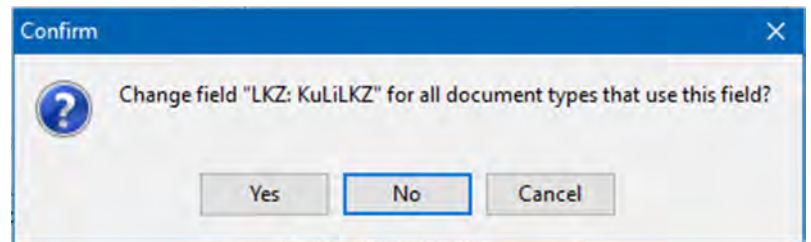
Fig. 90: Confirm change

If there are several program masks, this notification appears.
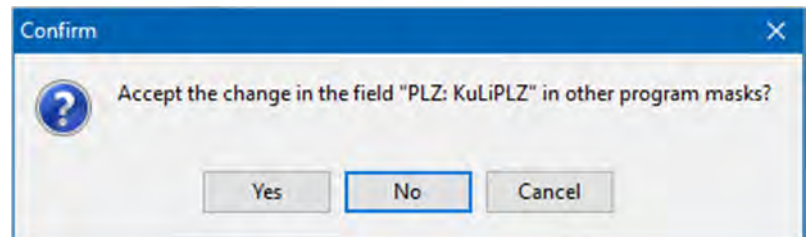
Fig. 91: Confirm change

You can then select the relevant mask.
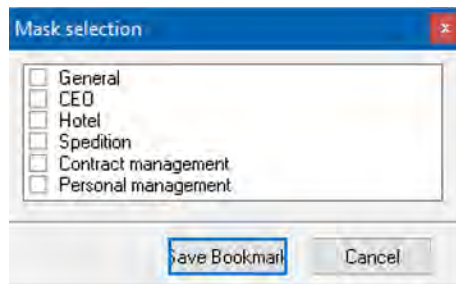
Fig. 92: "Mask selection"

> **! NOTICE!**
> Provided that the capture masks are identical, changes in the masks of the capture programs mutually affect each other.
>
> Masks are identical if the search criteria are created identically and the field properties behave identically. Masks which are not identical are more individual, but require more effort to maintain.

2.2.4.2.5   Create new database fields

Database fields which have not existed previously can be set up under *"Extras ➜ Create new database fields"* .

The window shown below opens. First, you need to select the *"Database"* for which the database field is to be created.
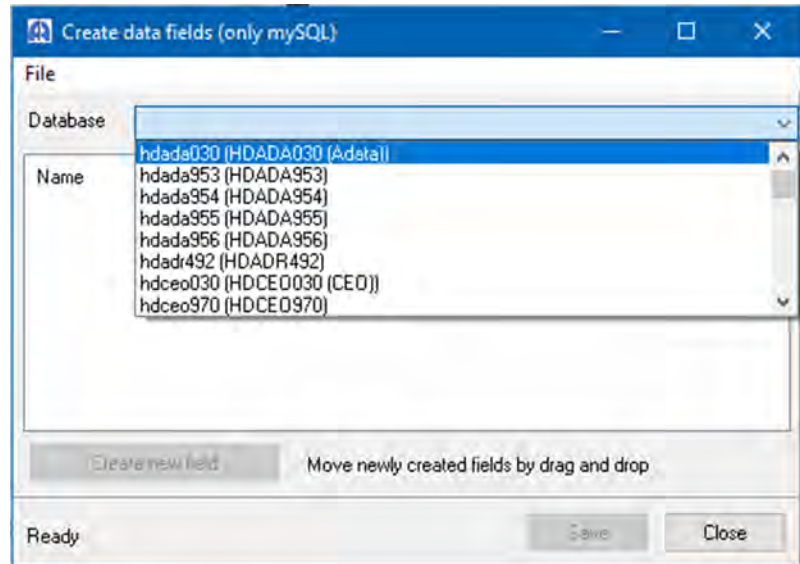
Fig. 93: Create DB fields

Start with the document group *"Retrieval"* . When you create new database fields, you will automatically be asked whether you also want to apply the changes to the capture mask. If database fields are created for *"COLD archiving"* and *"merging"* , you should start with *"HDHAB070"* .

The existing database fields will then be displayed. To open the next dialog box, click *[Create new field]* .

Enter the required criteria, such as *"Field name"* (internal name) and *"Label"* (external name).
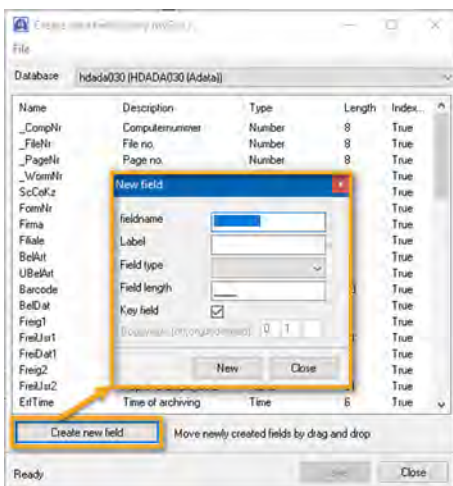
Fig. 94: Create DB fields
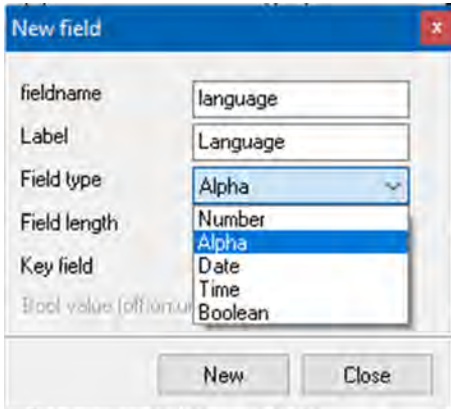
Fig. 95: DB — New field

Select the *"Field type"* (Number, Alpha, Date, Time, Boolean). The *"Field length"* box is only active if you have not selected a date, time or Boolean field. In this case, the field length is fixed.

To transfer the field to the Aimdex or index, it must be defined as a key field. Only then is this field even available for retrieval.
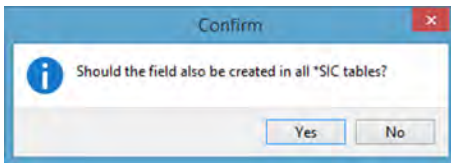
Fig. 96: Confirm new field

To transfer the field to the database, click *[New]*. You will be asked whether the changes should also be applied to the SIC tables.

This is to establish whether the new field is also to be created in all temporary capture tables and the associated SIC tables. If the new field is also to be used in the capture masks, this question must always be answered with *"Yes"*.
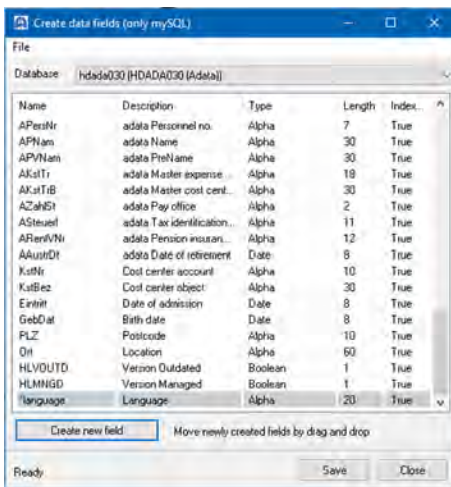
Fig. 97: Create DB fields — Result

The field has been transferred to the database. It is now shown without * in the database fields table. The new field will be right at the bottom of the sequence and can be moved using drag & drop.

To assign the new field to the document types, go back to the program mask. Under *"Available fields"*, activate the *"Display unused fields"* checkbox. The new field will now be displayed in the available fields and can be moved to the *"Active fields"* box. You can modify the new field in the *"Field properties"*.

NOTICE!
New fields will automatically be transferred to all databases which are defined identically to each other. The fields must be entered manually for all other databases.

2.2.4.2.6 Manage item boxes

To enable database fields to be used in the item boxes, a specific program mask for the respective databases and masks (retrieval/ capture/post basket mask) is defined in the Mask editor.

If you select this, all database fields which are already used in the item boxes will be shown in the *"Active fields"* overview.
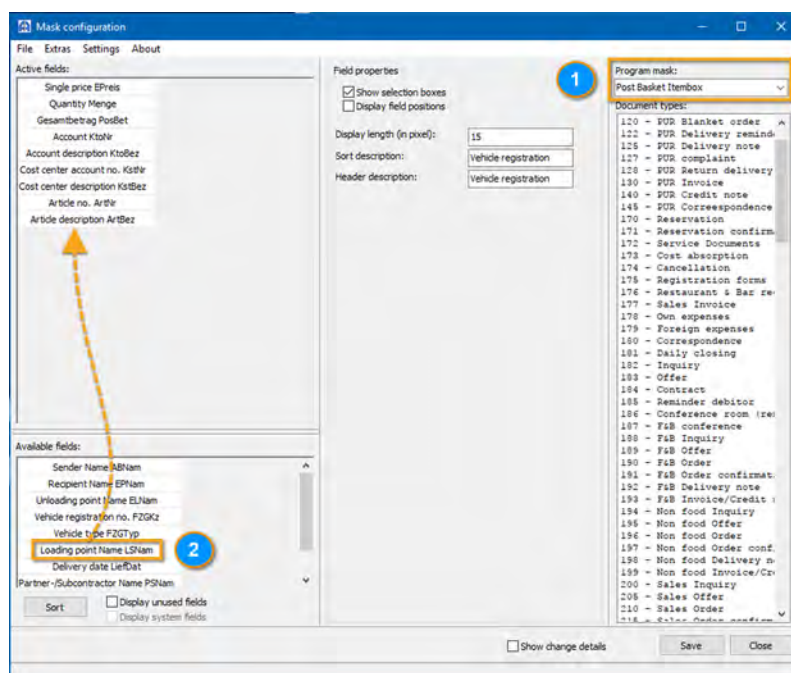
Fig. 98: Drag & drop field

To add further fields, these will be moved from the *"Available fields"* box to the *"Active fields"* box.

2.2.4.2.7 Document type administration

To create new document types, go to *"Extras*
➔ *Document type administration"* in the menu to select the document type editor. This offers you the following options:
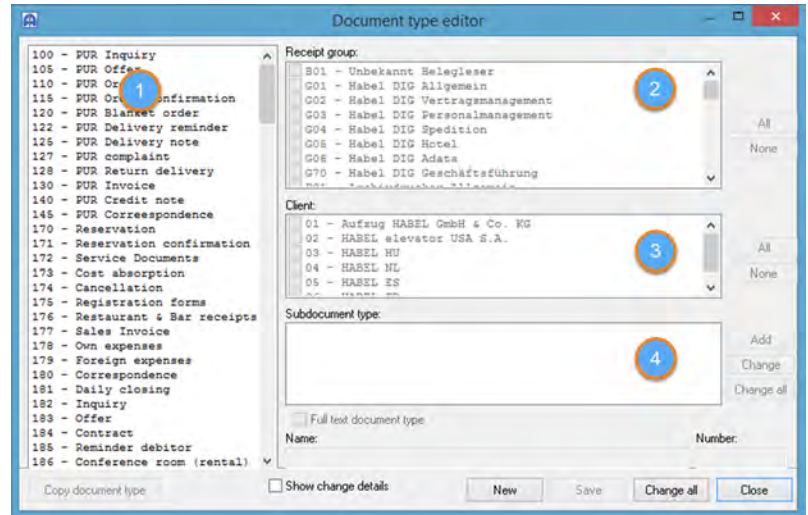
Fig. 99: "Document type editor"

1   Selection of the document type
2   *"Document groups"*
3   *"Clients"*
4   *"Subdocument types"*

Selection of the document type	You can select the document type to be edited in the area on the left. Or use it as a basis for a new document type.
"Document groups"	The existing document groups are listed in the area in the middle at the top. Activate the checkbox to assign a particular document group to the document type currently highlighted. Selecting *[All]* or *[None]* speeds up the selection.
"Clients"	In the area in the center, you can select the clients for which this document type is to be active. Here too, you can use the *[All]* or *[None]* buttons.
"Subdocument types"	If the document type has a subdocument type, these are shown here. They can be changed (*[Change]* button: only the name can be changed) or deleted (*[Delete]* button).

Use the *[New]* button to create new/additional subdocument types for the selected document type. If you create new document types which are also to have subdocument types, you must save the new document type first. Then select this to create subdocument types.

An input window will appear where you can enter the number and name of the subdocument type. Once you have confirmed your entries, the subdocument type will appear in the overview.
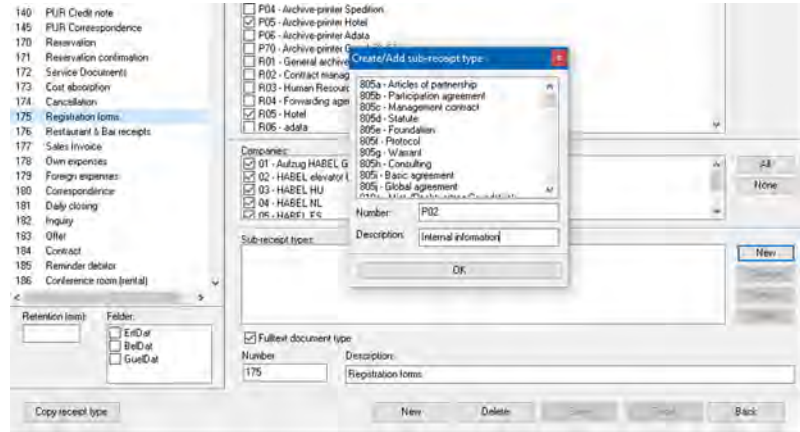
Fig. 100: Create new subdocument type

To finally transfer the new subdocument type to the highlighted document type, you need to save it. If you forget to save and change to another document type or close the program, a confirmation prompt will ask you if you want to save the changes for the document type (in this case, Product information).
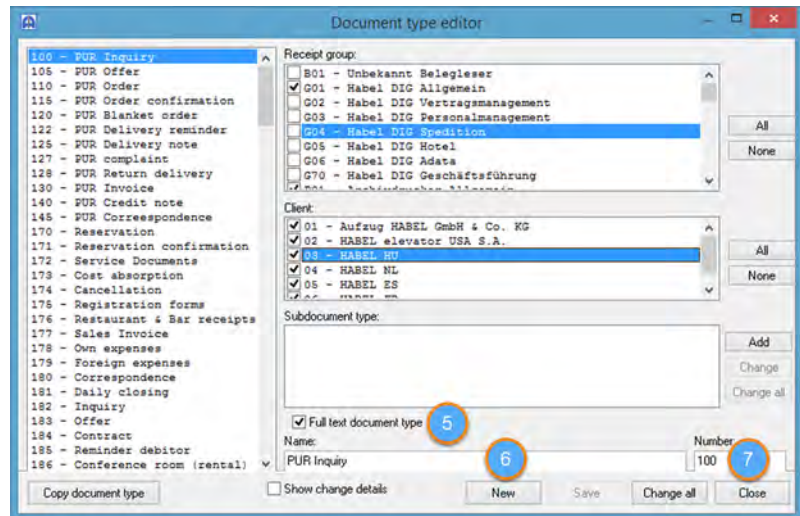
Fig. 101: "Document type editor" 2

5   *"Full text document type"*
6   *"Caption"*
7   *"Number"*
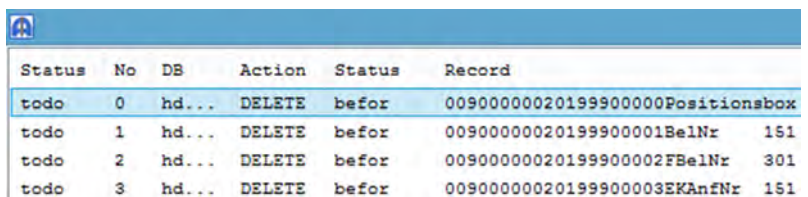
"Full text document type"	If you select this box (provided that you are using *"HABEL-FULLTEXT"* with the corresponding full text licenses), the highlighted document type will be defined as a full text document type (exception: COLD document types). By means of an automatic function on the Job server, the documents archived to this document type in future will be indexed with full text indexing which allows full text retrieval (see Retrieval, Full text search). If documents are to be indexed with full text indexing retrospectively, this is not possible with this function and must be performed by HABEL.
"Caption"	You can define the external name here (i.e. the text that is to appear in the mask as the name of the database field). The internal name cannot be changed.
"Number"	You can enter the document type key here (which is also a retrieval field in combination with the document type) (only possible for new document types).

Copy document type

The *[Copy document type]* button is used to prepare a new document type with the same criteria. The *"Name"* and *"Number"* fields are cleared. Enter the new values in the *"Name"* and/or *"Number"* fields and save the procedure. The new document type is inserted.

Show change details

As with changes in the field properties, you can also display the details for the changes in the document types, which are performed in the background in *"HDHABPAR"*. Use function keys to apply the changes or undo them.

Fig. 102: Show change details

[New]

The *[New]* button clears all checked fields for the document group assignment and client assignment as well as for full text, name, number and subdocument type. You can create the new document type by entering the name and number and perform the assignments to the document groups and clients accordingly. If the new document type is to be indexed with full text indexing, check the *"Full text document type"* field. The new document type will be available on the left in the overview after saving.

[Save]	To complete the process of creating new document types or changing document types, you need to save. This is done using the *[Save]* button.
[Delete]	You can remove document types that you do not need any more with the *[Delete]* button. Please note that you will then only be able to access documents which were archived under this document type if you do not select a document type when retrieving them.
[Close]	Click *[Close]* to close the Document type administration.

2.2.4.2.8   Create or copy masks

Under the menu item *"Extras*
➔ *Generate new program mask from capture mask"* you can create new masks. You can only generate masks from capture masks, because a retrieval mask usually does not have any defined mandatory fields or item capture.
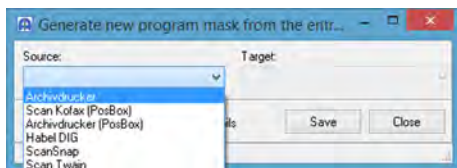
As the source, select the capture program that is to supply the mask for another program (*"target*
➔ *selection from databases that have already been created"*). Regardless of which program mask has been selected in the area on the right, only masks that can be copied will be shown as the source.

Fig. 103: *"New program mask"*

If you have activated the *"Show change details"* checkbox, you will see an overview of *"HDHABCFG"* with the changes that have been made.
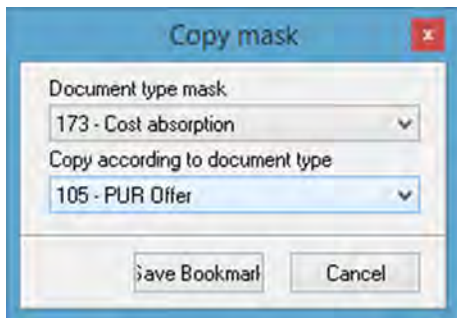
You now have the opportunity to undo the change (*[F6]*) or accept it after checking it (*[F9]*). You can copy masks from document type to document type in order to apply the same database field structure to the other document type. To do this, use the menu *"Extras*
➔ *Copy mask to"* or open the context menu by right-clicking in the area on the right of the program mask selection. A selection window appears in which you can select the source mask and target mask.

Fig. 104: *"Copy mask"*

The settings made for the source document type (in this case, document type 26) are applied to the target document type (in this case, document type 44). Changes made subsequently to one of the two masks have no effects on the other masks, as no link is established through copying.

Difference between *"Generate mask from mask"* and *"Copy mask to"*:

With *"Generate mask from mask"*, whole masks are transferred with all their content including all document types. With *"Copy masks to"*, you need to select the document type, so the masks are only copied from document type to document type.

2.3 Support

2.3.1 TeamViewer

You can use this item to start a connection to the TeamViewer. The following window contains a unique ID and a password which are needed for assistance by HABEL Support or the project managers.

3   Client installation

The *"Client installation"* (HpHab859) allows you to install and maintain workstations rapidly and in a standardized manner.

Fig. 105: Client installation

> **! NOTICE!**
> If a drive letter has been set up for access to HABEL, start the installation program HpHab859.EXE from this drive. Alternatively, you can also use a UNC path, e.g. \\habel-server\habel\gedosod\32-bit\hphab859.exe.
>
> The installation requires local administration rights

The HABEL workstation installation is divided into three program parts which need to be installed globally on the workstation:

■ Profile setup
■ Archive printer
■ Add-in for Outlook

3.1   Profile setup installation

When installing the profile setup, the *"HABEL Profile Setup"* program (HpHab854.exe) is added to the workstation's system-wide auto-start menu.

"HABEL Profile Setup" checks which *"HABEL program links"* are to be available for the logged-in user.

These are managed in the *"User/Group Administration"*.

Fig. 106: Profile setup

> **! NOTICE!**
> New HABEL users must first be created in the *"User/Group Administration"*.

Once the user has been created in the *"User/Group Administration"*, a new entry is automatically stored for this user in the *"Client Installation"* tab. The user name is a combination of the domain and Windows log-in names.

In HABEL, the Windows login name is also called the *"UserSystemName"*. Details of this are provided in the Administration chapter (↳ *Chapter 2 "HABEL Administration" on page 6*).

> **! NOTICE!**
> If the corresponding entry is not in the list, run the *"HABEL Profile Setup"* (HpHab854.exe) manually on the workstation. The program will automatically generate a new entry for the user in question. The program can be found in the local auto-start menu.

3.2 Setup of links

When you start the *"HABEL Profile Setup"*, the system checks whether there is already an entry for the logged-in user in the *"Client Installation"*. If there is no entry, one will automatically be created and the *"ProfID"* (Globally Unique Identifier) will be entered in every case. HABEL identifies the logged-in user on the basis of the ProfID.

Fig. 107: "ProfID"

In the *"system control ➔ software"* a *"HABEL Client"* uninstallation routine is created, if there is not one already.

"HABEL Profile Setup" also checks which links are to be available to the logged-in user. These links, such as *"Retrieval"*, *"Post Basket"* etc., are automatically set up on the desktop and in the start menu for the logged-in user, or removed if necessary.

Functions such as adding *"Archiving"* (HABEL) to the context menu, *"Office integration"* and *"E-mail archiving"* from TOBIT are also installed or — if necessary — removed.

Depending on what version of Microsoft Office you use, special function buttons are provided in the Office programs.

> *A standard Windows user does not have rights to remove the "HABEL Profile Setup" from the system-wide auto-start menu.*

3.3 Archive printer installation

The installation requires local administration rights

Installation of the archive printer driver adds the local printer *"HABEL ARCHIVE PRINTER"* on the workstation. This printer allows you to archive documents in HABEL from a wide range of applications.

In the printer settings, each user can change their own layout, paper and quality settings. The quality is set to black and white by default.

Fig. 108: Archive printer
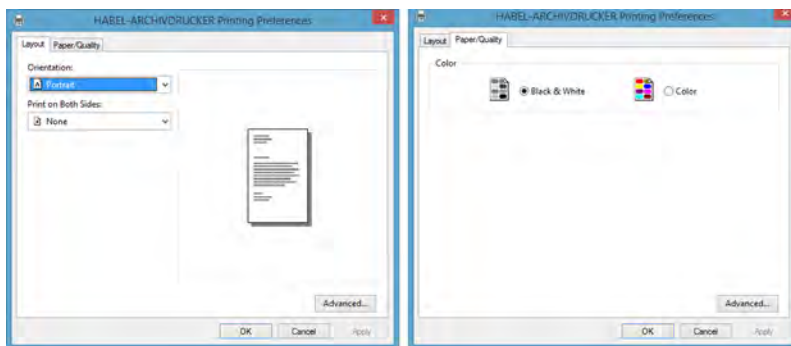
Fig. 109: "Printer settings"

3.4 Outlook add-in installation

The installation requires local administration rights

The installation routine adds the *"add-in"* to Microsoft Outlook.

4   Blu-ray media setup

Handling Blu-ray media

Blu-ray media have a special tough protective coating. The BD defect management of the PoINT Jukebox Manager intercepts write errors. However, the number of correctable write errors is limited. Therefore these errors should be prevented by careful handling of Blu-ray media. In particular, avoid fingerprints and scratches on Blu-ray media.

Volume distribution — Collection media and individual media

Blu-ray media are known in HABEL as collection media. The media usually created on a Blu-ray medium are known as individual media. These are stored in directories on the Blu-ray medium, which are referred to as virtual individual media below.

Every Blu-ray medium is assigned a unique medium name:

■ DISKV001 = original 001
■ DISKS001 = duplicate 001

etc.

The distribution of the virtual individual media can be viewed in the *"HABEL Administration"* in the Volume Administration area under Volume Distribution.

Labeling of Blu-ray media

DISKV001
Worm 001-010
Original

Fig. 110: Labeling of the original medium

Example:

Label the Blu-ray medium with a suitable CD/DVD marker. The Blu-ray medium should be labeled with the medium name, the virtual individual media it contains and the type (original or duplicate).

4.1 Format Blu-ray media

After inserting a blank BD-R in the drive, you can format it in the Administration Tool of the PoINT Jukebox Manager. Right-click to open the relevant menu in this tool:
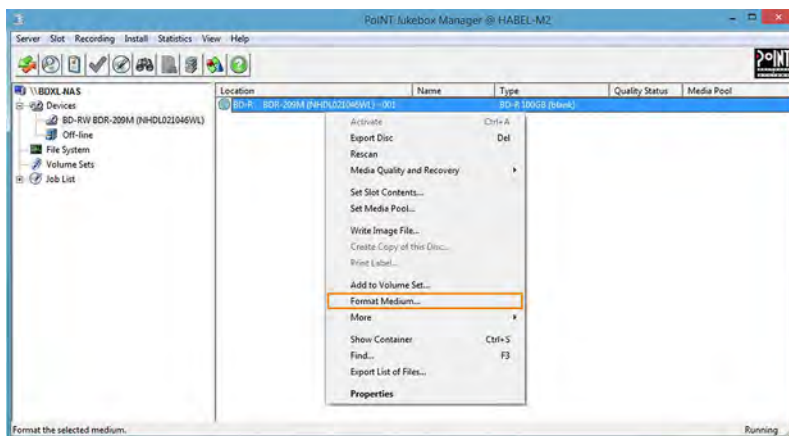
Fig. 111: Format Blu-ray medium

!   **NOTICE!**

Please note that for tamper-proof archiving, only so-called BD-R media may be used. The media type is shown in the *"Type"* column.

Fig. 112: Formatting dialog
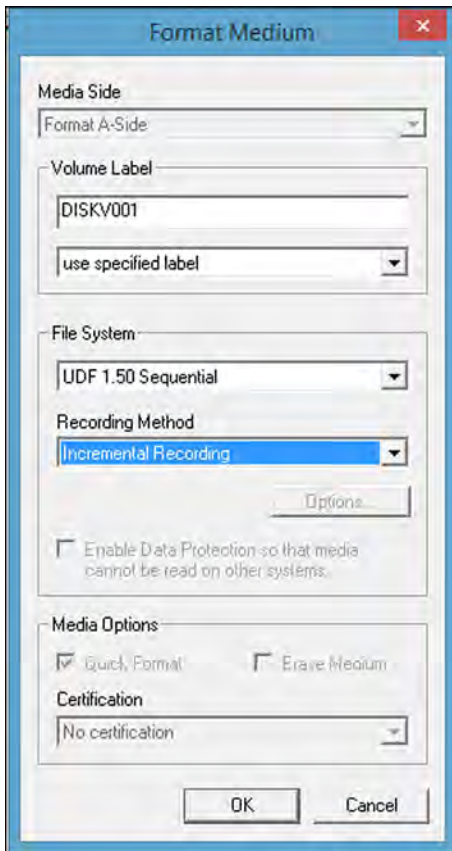
"Format Medium" formatting dialog

The Volume Label corresponds to the name of the collection medium, e.g. DISKV001.

The virtual individual media on the medium are essential for identification of the medium for transfer to Blu-ray. See the next section for details.

4.2   Create directory structure

There needs to be a directory structure on the Blu-ray medium so that the virtual individual media can be identified when transferring to Blu-ray. The directory structure can be created on the Blu-ray media in the Volume Administration area of the *"HABEL Administration"* under Base parameters.

The dialog *"Write WORM ID"* refers to the virtual individual medium to be created. ORI stands for original and DUP for duplicate.
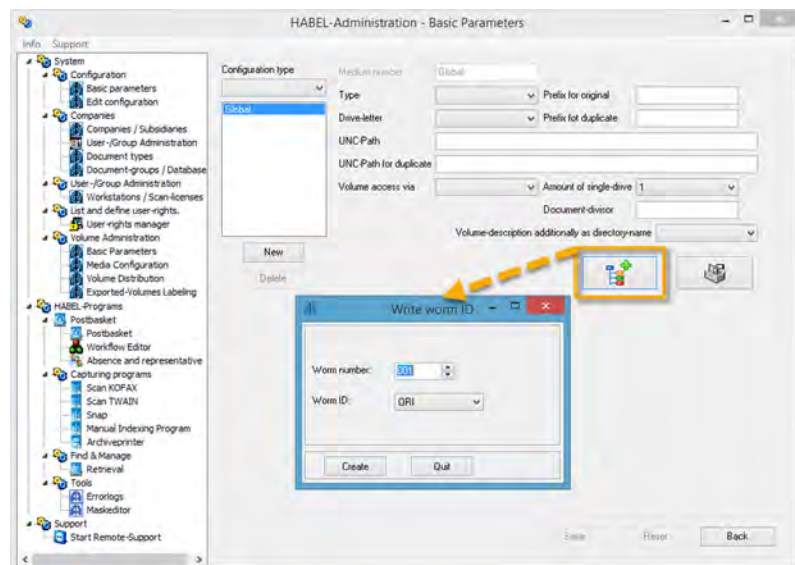
Fig. 113: Write WORM ID

For example, if the individual media from V0000001 to V0000010 are to be created on DISKV001, you must explicitly create ten virtual individual media.

The content of the Blu-ray medium then looks as follows:

The Blu-ray medium is now ready for transfer to Blu-ray.
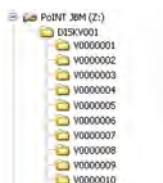
Fig. 114: Virtual individual media on Blu-ray

4.3 Finalize Blu-ray media

Blu-ray media for which no more data is to be generated can be completed with a *"Finalize"* procedure. This finalizes the UDF file system on the medium and no more data can then be written to it. A finalized medium can then be read in any standard Blu-ray drive with suitable media technology (BD, BD-DL, BD-XL etc.).

> **!** **NOTICE!**
> Only perform this procedure when no more data is to be written to the Blu-ray medium.
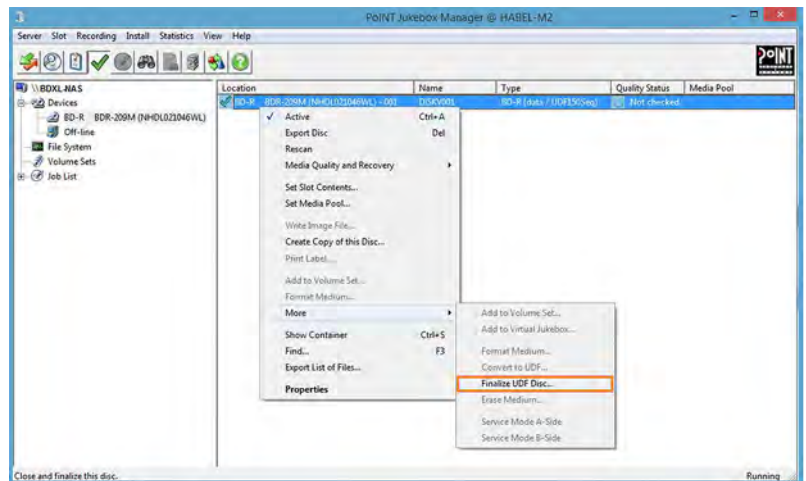
Fig. 115: Finalize disk — Make it no longer writable

After finalizing, the Blu-ray medium is shown with the type *"BD-ROM"*.

Fig. 116: Display in the PoINT Jukebox Manager of a finalized medium

5 Secure data on Blu-ray drive

These guidelines provide an overview of the procedures for transfer to a Blu-ray single drive. The described steps may vary depending on your system environment.

5.1 Automatic transfer to original medium in the HABEL Job Monitor

In normal operation, the current original medium should be inserted in the Blu-ray drive. Data is written to it, for example, in the job *"Night job"*. The data is transferred by the program *"HABEL Transfer"* (*"HPHAB806.exe"*).
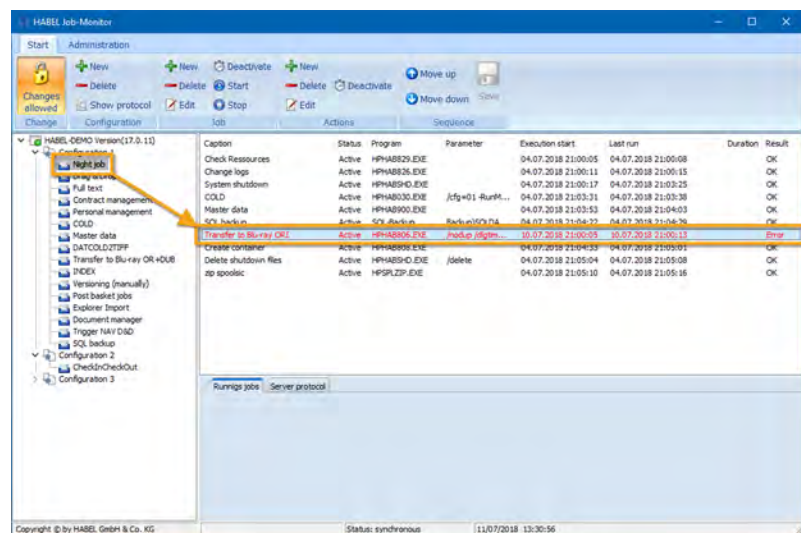
Fig. 117: Transfer of the data via HABEL Job Server

The parameter /nodup defines that data is only written to the original medium.

The parameter /dlgtimeout=30000 defines that any dialogs that appear are automatically closed after 30 seconds. For example, if the required medium is not inserted.

If errors occur, this will be indicated for the job in question.

Fig. 118: Job performed with errors

If this is set up, the error log is sent via e-mail.

5.2   Manual transfer to original and duplicate

In addition to the automatic transfer, there is a further job within the HABEL Job Monitor that must be started manually. This is used for transfer to the original and duplicate medium.

Perform the transfer as regularly as possible so that you have an up-to-date duplicate medium in case or media errors, media loss etc.
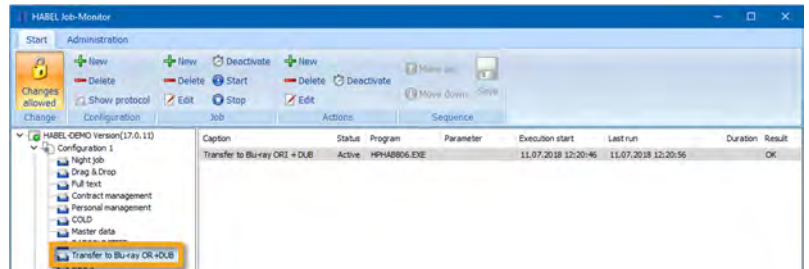
Fig. 119: Job for manual transfer in the HABEL Job Server

The transfer program is started without parameters. Transfer is therefore to both the original and the duplicate medium. The dialogs for changing media are not automatically closed.

5.2.1   Perform manual transfer
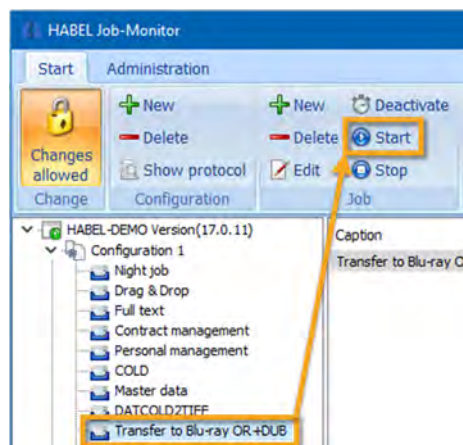
Fig. 120: Start transfer

1. ▶ Select the job for transfer in the view and click Start.
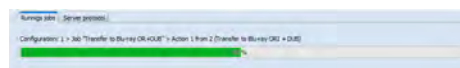
Fig. 121: Progress bar of the current job

⇨ The progress of the transfer is shown in the bottom area of the HABEL JOB Monitor under *"Current jobs"*.

2. ▶ During the transfer, you will be asked to change the media. When you are asked this, you must insert the corresponding Blu-ray medium containing the WORM number that has been specified.

⇨ *"ORI"* stands for the original medium and *"DUP"* for the duplicate medium.
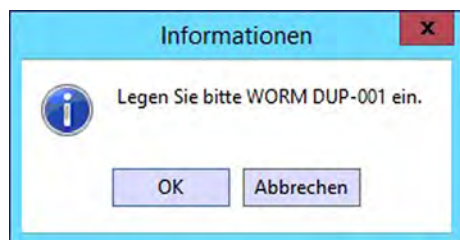
Fig. 122: Indication that a duplicate must be inserted
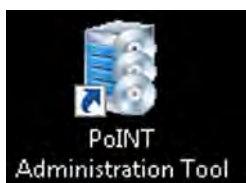
Fig. 123: Administration tool for PoINT Jukebox Manager

3. ▶ The drive tray is controlled via the PoINT Jukebox Manager. To change media, open the program *"Administration Tool"*.

Fig. 124: Interface of the PoINT Jukebox Manager

⇨ In the PoINT Jukebox Manager interface, the connected Blu-ray drive is shown on the left. When you select this, you can see the medium that is currently inserted on the right:
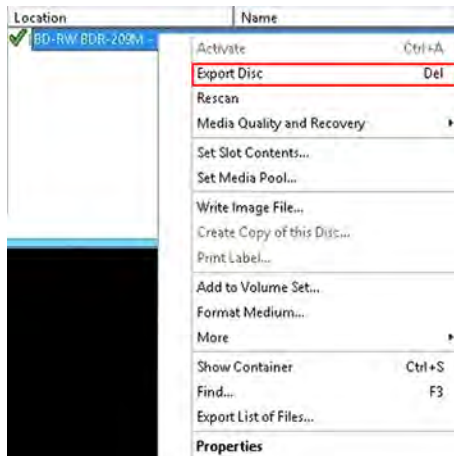
Fig. 125: Eject medium
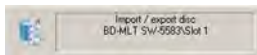
Fig. 126: The medium is ejected

Fig. 128: Insert dialog for duplicate

4. ▶ Right-click to view the sub-menu of the medium. To eject the current medium, select *"Export Disc"*.

⇨ The drive tray then opens.

5. ▶ When you have inserted the required medium, you can close the tray either on the drive itself or via the context menu.

Fig. 127: Display in the PoINT Jukebox Manager of the medium

⇨ The import procedure is shown in the PoINT Jukebox Manager.

After successful import, the new medium is displayed with a green check in the PoINT Jukebox Manager. You can also see the name of the inserted medium.

6. ▶ Then you need to confirm the dialog in the HABEL Job Monitor with *[OK]*.

The original and duplicate medium must be switched over as instructed in the dialog messages that appear during the transfer procedure.

The sequence of the procedure is as follows:

■ Write to original medium, with subsequent data cross-check
■ Write to duplicate medium, with subsequent data cross-check

Only once the data has been written to the original and duplicate medium and cross-checked on both is it deemed to have been successfully transferred.

The history of the transfer can be seen on the HABEL Job Monitor. To view the complete log, select *"View protocol"* in the menu. You need to make sure that you highlight the job beforehand.

After successful manual transfer, the original medium should be reinserted so that data can be written to it again via automatic transfer.

6   Completeness check

6.1   General

In your ERP program, consecutive numbers are usually assigned for offers, order confirmations, delivery notes and invoices. With the *"HABEL CHECK"* module, you can check whether the documents in the archive are complete with regard to these numbers.

Start the program *"HpHab310"* with the icon below.

6.2   Program layout

In the top section of the program mask, select the *"Database"*, *"Company"*, *"Subsidiary"*, *"Document type"* and *"Subdocument type"* (as required) for which you want to perform the check (1). To clear selected entries, press the Backspace key on your keyboard.

Fig. 129: "Completeness check"

In the area at the bottom, enter whether you want to perform the check for a particular time period (all date fields can be selected) or for a particular set of documents (you can select defined fields which can contain numbers as their value). In the Mask field, you can store conditions to be met for this set of documents (e.g. only 6-digit numbers etc.).

In the *"Interval"* selection field, you can define the search interval between one number and the next (1=every number, 2=every second number etc.).

You can control the type of display with the *"Combine"* checkbox. If the *"Combine"* checkbox is activated, incorrect entries within a particular time period will be combined. Otherwise, they will be displayed individually.

6.3 Result
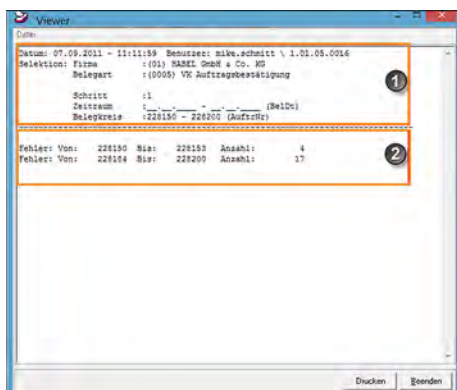
Fig. 130: Completeness check — "Viewer"

As a result, you will see an overview of the *"selection criteria"* (1) and the *"errors"* (2). Errors mean the document numbers which cannot be found in the defined field in the archive.

If you have combined the display, the *"missing number range"* and the *"number of errors"* will be shown. In this case, the document numbers 228154 to 228183 are present in the system. The others in the document number ranges from 228150 to 228153 and 228184 to 228200 are missing.

Press *[Print]* to print this overview, and *[Close]* to return to the selection program to run the next check.

> *The values entered in the selection fields are retained so that the number range and/or time period most recently searched are apparent the next time.*

6.4 Menu bar — Symbols

The *"File"* menu includes various commands that are also available as symbols.

"Start" Starts the program and the display of the result log based on the currently selected criteria.

"Log" Displays the result log based on the currently selected criteria.

"Close" Closes the program.

7 HABEL Job Server/Job Monitor

7.1 General

The HABEL Job Server is responsible for time-controlled or trigger-initiated automatic processing of stored jobs/routines e.g.:

- Transfer of **COLD documents**
- Import of **master data**
- Backup of **MySQL databases**

The program activities are logged and, if required, the data can be output to any e-mail recipient. In general, the log needs to be checked every day, as this log lists processing errors. It also provides notices of updates in conjunction with the Update Service, which must be manually called up by the Administrator.

The HABEL Job Server is a service that is usually installed on the HABEL server and which processes the selected jobs in the background.

The HABEL Job Monitor monitors and administers the activities of the HABEL Job Server. The HABEL Job Monitor can be started on any client with a connection to the HABEL server or on the server itself. The Job Monitor does not execute any jobs, but only displays the activities and configurations of the Job Server.

You can access the Job Monitor with the program *"HpJobMon.exe"* and the icon below.

7.2 Program layout
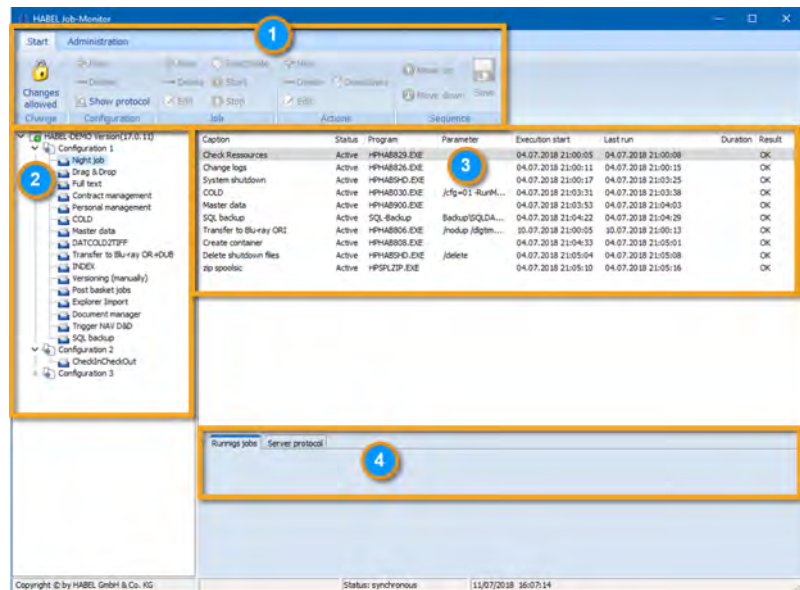
Fig. 131: Job Monitor — Program layout

1   Menu bar
2   Configuration
3   Jobs
4   *"Current jobs"*

Menu bar	In the *"menu bar"*, you can configure the required settings in the individual areas. One of the functions of the *[Changes allowed]* button is to activate *"change mode"*. To make changes, this needs to be activated.
Configuration	The *"Configuration"* area (left) provides an overview of the configurations in the Job Monitor and the jobs it contains. To edit individual jobs in parallel, you need to create multiple configurations. Jobs (3) can only be processed in series within a configuration. The sequence of jobs within a configuration can be adjusted using drag & drop. The dependency of individual jobs to one another can also be defined in this area. If you want to specify that a job is only to be edited once another job has been fully processed, the subordinate job can be dragged onto the hierarchically superior job using drag & drop.
Jobs	The individual jobs within a configuration are described in more detail in the *"Jobs"* area on the right. When you select a job in the *"Configuration"* (2) area, the actions are visible with the status in each case. For example, there is an explanation of which steps are performed within the job, the job status, which program/parameters is/are affected, the start time, the time of the last run, the duration and what the result is.
"Current jobs"	The progress of the processing of the jobs is shown under *"Running jobs"* in the form of a process bar. The process bar always shows the currently running job/ action. Double-click on the bar to display the job.

7.2.1 Menu bar

The menu bar is split into the *"Start"*/*"Administration"* tabs. There are various areas within the tabs. These are explained below.

7.2.1.1 START

"Change"

Changes can only be made from one Job Monitor. However, different clients can use multiple Job Monitors at the same time.

"Configuration"

Here you can create new configurations and delete existing ones. *"View protocol"* provides information about correct or incorrect execution of the jobs within this configuration. If multiple configurations are used, you must click on the configuration for which the log is to be opened in the area at the bottom first.

Job

Jobs can be deleted or edited and new jobs created. You can also temporarily deactivate a whole job. The deactivated job is shown in gray.
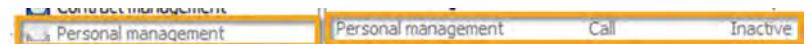
Fig. 132: Job Monitor — Job

Use *[Start]* and *[Stop]* to start and stop jobs manually (if necessary independently of the stored chronological rhythm). The progress of the jobs is shown in the area at the bottom of the screen under *"Running jobs"*:

Fig. 133: *"Job Monitor ➜ Current jobs"*

Actions

Individual actions can be edited as soon as a job has been highlighted in the *"Configuration"* area. The options *[New]*, *[Delete]*, *[Edit]* and *[Deactivate]* are then available for the individual actions within a job. Only the individual action is then shown in gray within the job.

Sequence

When a job has been selected, the sequence of individual actions can be changed within a job. Changes must be saved.

In the *"Administration"* tab, basic settings on the Job Server and general program settings can be configured. *"Change mode"* must be activated prior to this. Also see).

7.2.1.2 ADMINISTRATION

[Edit]

You can configure settings here for accessing the server. When the *"HABEL Job Monitor"* is started on a client for the first time, you may need to specify here where the *"HABEL Job Server"* (i.e. the service that executes the jobs) can be accessed.
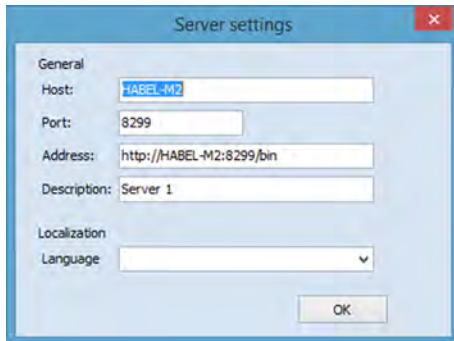
Fig. 134: "Job Monitor
➔ *Server settings"*

[Refresh]

If new versions for the HABEL Job Server are downloaded via the HABEL Update Service, these are not automatically substituted immediately. Use the *[Refresh]* button to stop the service. All the necessary programs and files will then be substituted and the service restarted.

[Connect]

The *[Connect]* button is used to restore the connection to the server if it is interrupted. For example, the connection can be restored after performing the update as soon as the service is running again.

[Check]

The *[Check]* button is used to check the programs used in the Job Monitor to make sure they are available in the correct release version and thus can work/start without errors.

"Extras ➔ Settings"

Under *"Settings"*, you can define general settings such as for sending logs by e-mail (see ↻ *Chapter 7.4 "Logging" on page 118*). Program information is shown under Information.
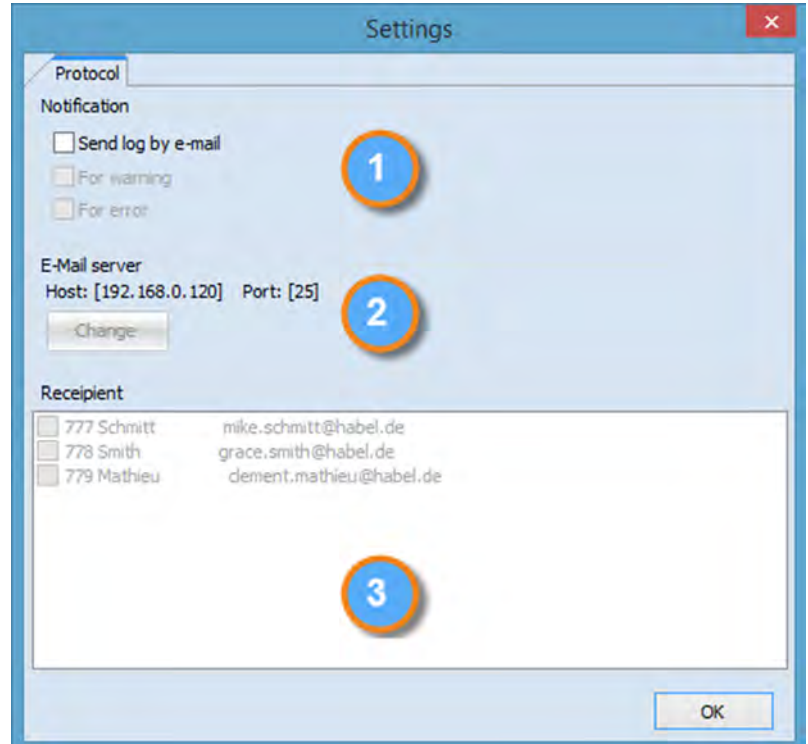
Fig. 135: "Job Monitor ➔ Settings"

1 Activation of the option to send logs by e-mail. This defines whether the notification is to apply only for warnings and/or errors, for example.
2 E-mail server settings.
3 Selection of the e-mail recipient.

7.3 Implement changes

When you start the HABEL Job Monitor, changes to the configuration are initially not allowed. Provided that changes are not currently being made from any other HABEL Job Monitor, you can activate the change mode by clicking the *[Changes allowed]* button.
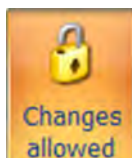
If the **change mode** is not activated, you can view the logs and configurations, but the buttons for making changes are **deactivated**.

7.4 Logging

You should check the Job Monitor every day. Despite the tools to assist you, such as notification by e-mail, only daily checking can ensure that no discrepancies or errors have occurred.

If an action led to errors, this is shown in red and marked with the word *"Error"* as the result. Additional information on what caused the error is provided in the *"log"*. Individual logs are created for each configuration (if jobs are edited in parallel).

To display the logs, select View log in the menu bar:
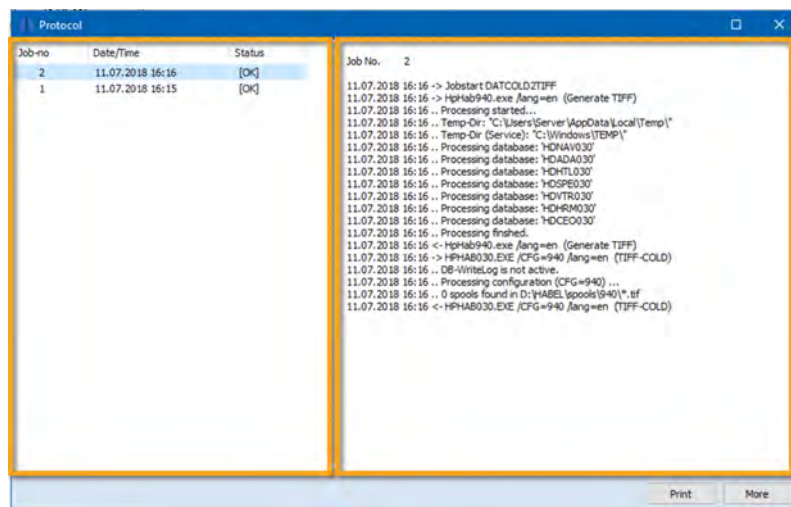
Fig. 136: "Job Monitor ➜ Log"

The history of all logs is shown in the area on the left. When you select a log, the details are shown in the box on the right.

The following abbreviations are used in the *"log"*:

-> - Start of an action

.. - Interim logging

<- - End of an action

.! - Error in this action

.? - Warning in this action
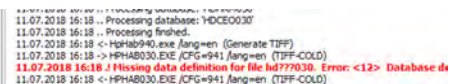
Fig. 137: Section from erroneous log entry

Errors are also shown in red and in bold script, and warnings in bold script:

In the case of e-mail notification, there is no visual highlighting of errors or warnings.

Errors are resolved by the administrator. If there are error messages or warnings in the Job Monitor which are unclear or which you are unable to resolve yourself, please contact HABEL Support (support@habel.de).

7.5 Create a new job

Is a new configuration required?

Before creating a new job, you must decide whether a new config-uration is also required. With a new configuration, it is possible to run different jobs in parallel and set up separate logging. To create a new configuration, you can either select *"Insert configuration"* in the context menu or *"Configuration ➔ New"* in the menu bar.

A new job and the associated actions can now be created:

Create job

Select *"Create job"* in the context menu or *"Job ➔ New"* in the menu bar to open the dialog for creating a new job.
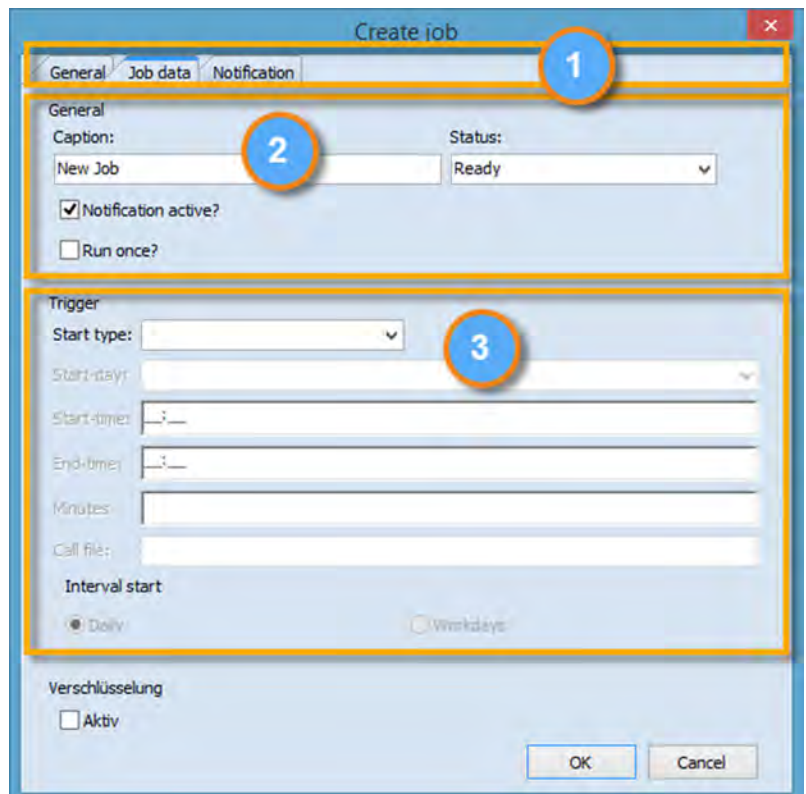
Fig. 138: Job Monitor — Create new job

(1) Moving within the tabs

When the window opens, the Job data tab is always displayed.

(2) *"JOB DATA"* TAB

"Caption"	Name of the job.
"Status"	Defines whether the job is executed (Ready) or not (Inactive).
"Notification active"	For this job, the notification is activated.
"Run once"	Defines whether the job is only to be run once.

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(3) *"Start type"*   Selection of the rhythm

Start type	Meaning	Option to be set
Daily	Job is run daily.	Start-time
Weekly	Job is run weekly.	Start-day and start-time
Monthly	Job is run monthly.	
Call*	Job starts when the trigger file has been found.	Which file is expected as the trigger and where.
Manual	Job does not start automatically.	
Workdays	Job is run every workday.	Start-time
Interval**	Job is run every X minutes during a period of time	Start-time, end-time and interval in minutes

* If jobs are defined as "Call", this starts mostly when a particular file is located in a defined directory. Example: Spooling, in which new data, which needs to be transferred immediately, arrives at irregular intervals. When data arrives, the Job Monitor recognizes on the basis of particular files that the job must be started.

** For interval jobs, there are multiple start times in a day.

"Start-day" / *"Start-time"*	Specifies the day and/or time at which the job is to start.
"End-time" / *"Minutes"*	In combination with the *"start type"* *"Interval"*, it is possible to specify the end time and/or the duration of the interval in minutes
"Call file"	If the *"start type"* *"Call"* is set, then as soon as the file listed here is present in the *"HABEL directory"*, this job will be started.
"Interval options"	If the *"start type"* *"Interval"* is selected, these options define whether the job is to be run daily or every workday.

"NOTIFICATION" **TAB**   Settings can be defined here for notification if logging is activated.

"Recipient"	Activated HABEL users can be selected from the list as recipients.
"Additional e-mail recipients"	An additional external e-mail address, for which no HABEL user has been created, can be entered here. The notification will then also be sent to this address.

"GENERAL" **TAB**   This is used for documentation. The job can be described in more detail here:

7.5.1   Insert action

Right-click in the *"Actions"* area and select *"Insert action"* or select *"Actions ➔ New"* in the menu bar to create the individual actions for a job:
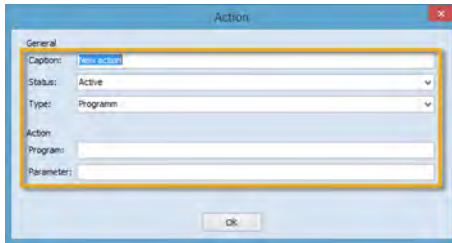
Fig. 139: Insert action

> ℹ️ *Programs/batch files etc. that are not in the GEDOSOD\32-Bit directory must be saved with a complete path name.*

The name of the action appears in the log. You should therefore choose an informative name here. The program name must always be written out in full. The program must be in the *"..\GEDOSOD \32-bit directory"* in order for it to be executed.

The programs can also be called up with *"Parameters"*.

A job that has been fully created could then be displayed in a new configuration with different actions, as in the example below:

Fig. 140: Job — Example

7.6   Edit jobs/actions

The same functions are available under *"Edit jobs"* / *"Edit actions"* in the context menu or in the menu bar under *"Create job"* / *"Insert action"* in the masks.

---

8 Evaluation programs

8.1 General

Fig. 141: Evaluation by HABEL Statistics

Evaluations help to answer questions such as:

■ What was done with the document? For example, was it printed, viewed or sent by e-mail?

■ Who did something with the document?

■ When was something done with the document?

For extensive evaluations, an additional program is available: *"HABEL STATISTICS"*.

On the one hand, activities in the document management system can be evaluated: which user uses which functions such as view, change, send by e-mail etc. or which document was involved in an activity?

On the other hand, you can perform evaluations for the archived documents in relation to the database fields: which document types have been most frequently archived, which document types have never been archived, for which customers have we archived the most documents? etc.

The module is designed to help recognize archiving errors, for example, and to deactivate superfluous document types and prepare evaluations for customers.

It is possible to define and save multiple recurring query schemas, and to use sorting/grouping functions and export to MS Excel.

To start the evaluation program, select *"HpHabstk"* or the icon

8.2 Program layout

When you start the program, you will see the mask which provides you with the evaluations.

Fig. 142: HABEL Statistics

In our example, data for evaluation is already available.

8.3 Evaluations

Fig. 143: HABEL Statistics "Retrieval search"

The same commands can be accessed in the *"menu"* as on the buttons in the footer:

"Retrieval search ➔ *Statistics"*

"Search history ➔ *History"*

Click the *[Retrieval search]* button (or select *"File ➔ Retrieval search"* in the menu) to open a further input mask for the evaluation criteria. When you have entered the criteria, start the evaluation with the *[Start search]* button.

Check the criteria which are to be displayed later. If the fields are to be filled with particular terms for the evaluation, select these in the *"Search term"* selection box for the respective fields.

Search schema

After entering the evaluation criteria, you can store them in a schema. You can call this up quickly for frequently recurring queries. To save it, click the *[Save schema]* button. Enter a *"Name"* for the schema.

Use the *"Search schema"* selection box to access saved query schemas and start them with the *[Load schema]* button. If you no longer need certain schemas, you can delete them with the *[Delete schema]* button.

Determine evaluation criteria

Check the boxes that you want to use for the evaluation. You can use selection boxes to access the relevant fields.

The *[More database fields]* button lets you access further fields. You can also use the *"Or"*/ *"And"* link to decide whether the fields for the evaluation are to be considered as linked or not linked.

Fig. 144: Define/determine evaluation criteria

Define databases

As the final step, select the databases that are relevant for the evaluation (with *[Add]*/*[Remove]*).

Fig. 145: Selection of databases to be searched

| *[Search history]*	To determine which users are using which functions and what happened to what document, open the search history mask with the *[Search history]* button. The database fields that are available for selection vary, because searches are performed here for users, for example.

Zero entries can also be displayed in all masks. This means that values can also be displayed for which the result would be zero (i.e. the database field or document type *"empty"*).

8.4 Examples

Possible evaluations could be, for example:

- How many documents were archived, or not archived (*"zero entry"*), with which document type in a certain time period?
- How many documents were archived on a particular date?
- How many documents were archived at a particular workstation?
- How many documents were archived by a particular user?
- Which articles were sold the most?
- Which customer takes up the largest proportion of the archive?
- Which file formats were archived the most?

Result evaluation

Fig. 146: HABEL Statistics
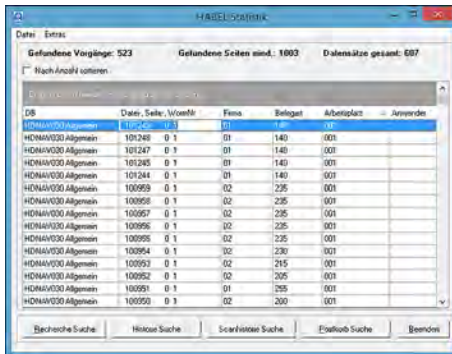
An overview is displayed showing the procedures, page number (min.) and records, if applicable (also contain e.g. the items). The database fields which match the entered selection criteria are shown in the overview according to the columns selected.

Fig. 147: HABEL Statistics — Group
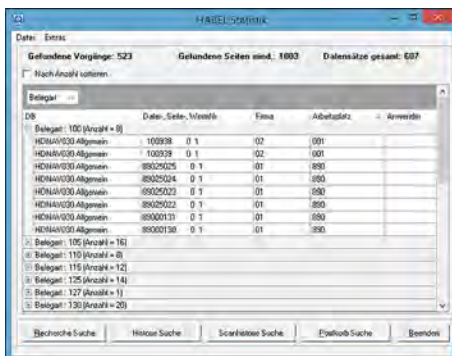
For a clearer overview of the result, you can drag the columns into the grouping field. Click on the relevant column to sort (ascending/ descending) according to this criterion.

"Extras command ➔ Options"

This command lets you switch between the faster search method using an individual field and the slower search method using multiple fields.

"Extras command ➔ Columns"

To add columns to the display or remove them, use the command *"Columns"*. Simply drag the columns out of the box or into the box to show or hide them. Only those columns which have also been defined as database fields within the evaluation will be available.

"Extras command ➔ Export"

"Export current view"	When you select this command, you will be asked to assign the file name and the location where you want to save the file. The data is exported to an Excel table that will be displayed instantly.

> **!** **NOTICE!**
> The current view is exported, which means that for grouped views, you will only see the grouped display in Excel. It is therefore more useful to export an ungrouped or at least opened table.
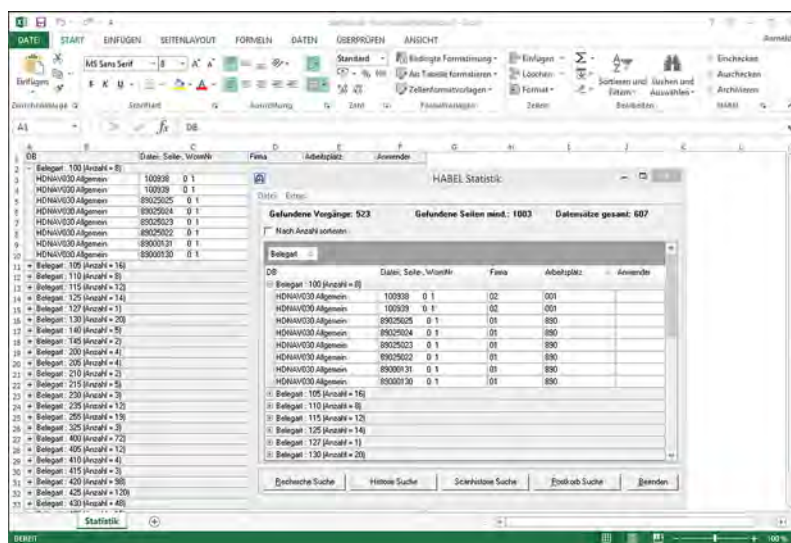

Fig. 148: HABEL Statistics — Excel export

"Document-type-related quantity statistics"	With this function, the absolute quantity which was found for each document type is output.
"Advanced"	The output data is grouped according to this field.

"Extras command ➔ Show document"

With this command, the selected entry appears as a document view in the retrieval.

9 HABEL SEARCH and REPLACE

9.1 General

In some cases, it is necessary to change a lot of the database fields in a stack.

Examples:

- Due to a change of company name, the entered customer name has changed.
- Terms which previously existed in different versions have now been standardized.
- Multiple supplier numbers have been used by mistake for archiving a supplier.

So that you do not have to change each entry individually in the correction document group, you can use the *"Search and replace"* function that you are familiar with from Microsoft Office. HABEL provides the *"HABEL SEARCH and REPLACE"* module for this purpose.

> **!**
>
> **NOTICE!**
> As with assigning rights for *"HABEL CORRECT"*, we recommend that only a few employees have access rights to this module. This helps to ensure that archiving is performed conscientiously, as not all employees have the option to make subsequent changes.

To open the program, select *"HpHab834"* or use the icon.
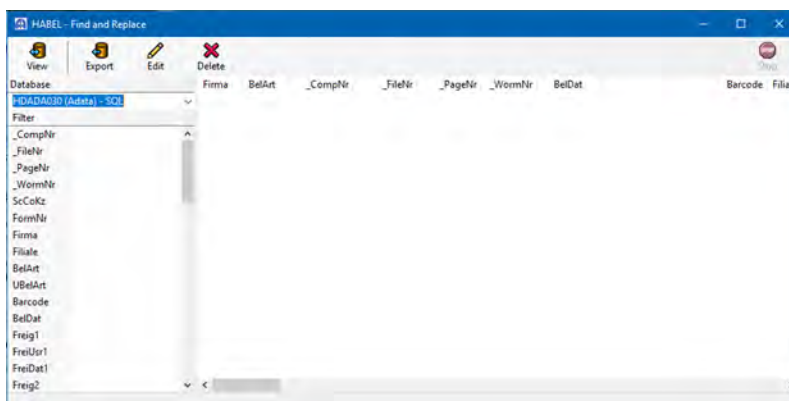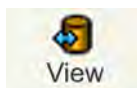
9.2 Program layout

Fig. 149: HABEL — Search and replace

Various commands are available in the area at the top in the form of symbols.

Display of the records found with the entered search term (no document display).

Export of the records found with the entered search term to a TXT file (fixed field/phrase length).

Edit — you will be asked which field is to be changed and how.

Delete the records which match this filter — a confirmation prompt will appear asking if you really want to delete the records.

There is also a selection box where you can define the database in which you want to search and replace.

To go to the required hits which need to be edited, use the database fields for entering the search terms in the *"Filter"* area. The result is displayed in the area on the right.

9.3 Search and replace

The first step is to enter the search term in the filter to find the result that needs to be edited. The filter can be *"sorted alphabetically"* via the context menu.

All the familiar options that are also available in the retrieval can be used for entering the term.

Example:

■ Word fragments in the SQL database are searched for with the wildcard *.

■ *"?"* in date fields means that any value can be in this position.

■ *"?"* in other entry fields means that this field must be empty etc.

When you select the *"Display"* symbol, all the records that match this search term will be displayed in the box on the right. Make sure that the phrases are correct (cross check: start the same search in the retrieval and check the number of hits).

You can also *"clear"* the entered value via the context menu in order to make a new entry.

The *"number of hits"* is shown in the status bar, in this case: 129 records.
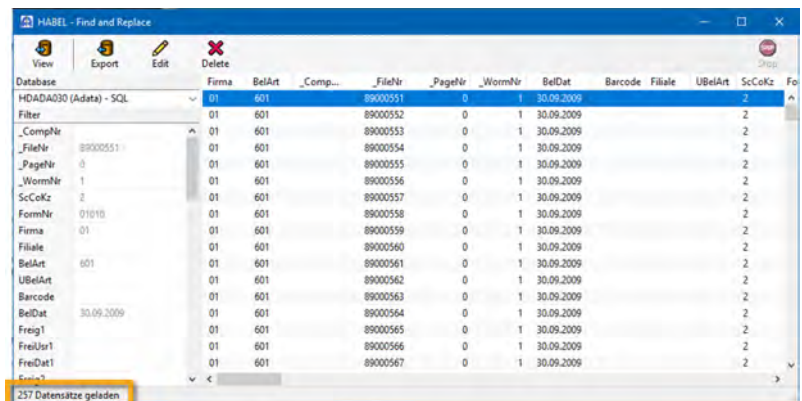

Fig. 150: "Search and replace"

By double-clicking on database fields, you can include these in the search as additional filters. In this case, filtering is performed as follows:
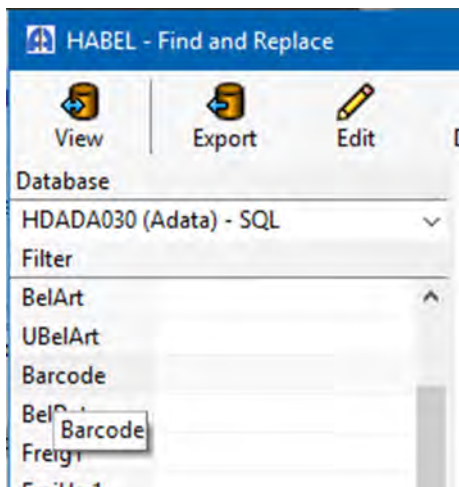
Fig. 151: Selection of the database field

KuLiNam - Feinmechanik Müller

BelDt   - 09.04.2003

The database fields filtered for the search have a yellow background. If you click the *"Display"* icon again, the result will be restricted to these fields. (The result will then include all hits for which the name is *"Feinmechanik Müller"* and the document date *"09.04.2003"*.) You can add any filters in this way. If you double-click again on a database field, it will be removed from the filter.
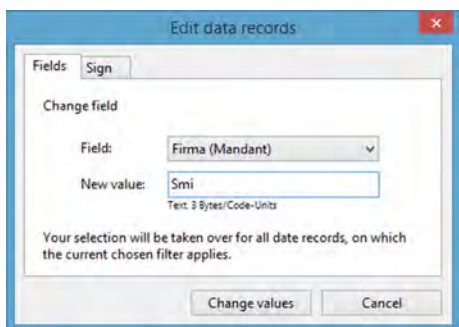

Fig. 152: Change records

Then make the change with the *"Change"* symbol. You can use the *"Delete"* symbol to delete. When you make a change, the next input mask allows you to select which field you want to fill with which new value. In the Sign tab, you can set new codes for export/subsequent merging and scan/COLD.

> **!** **NOTICE!**
> If you click *"Change values"*, the new value will be applied for all the records that match the current filter.
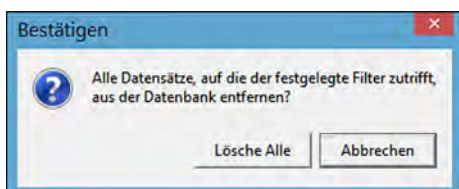

Fig. 153: Confirm

If you do not enter any data under *"New value"*, the field will be cleared. If you have selected *"Delete"*, a confirmation prompt will appear asking you whether you really want to delete.

If the answer is yes, the filtered records will be completely removed from the database.

> **!** **NOTICE!**
> It is not just the field that will be *"deleted"* (cleared).

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