HABEL®
Dokumentenmanagement

ALLES GEHABELT. ALLES GEREGELT.

Capture

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 users who work with the capture programs. 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 Archiving

2.1 Layout
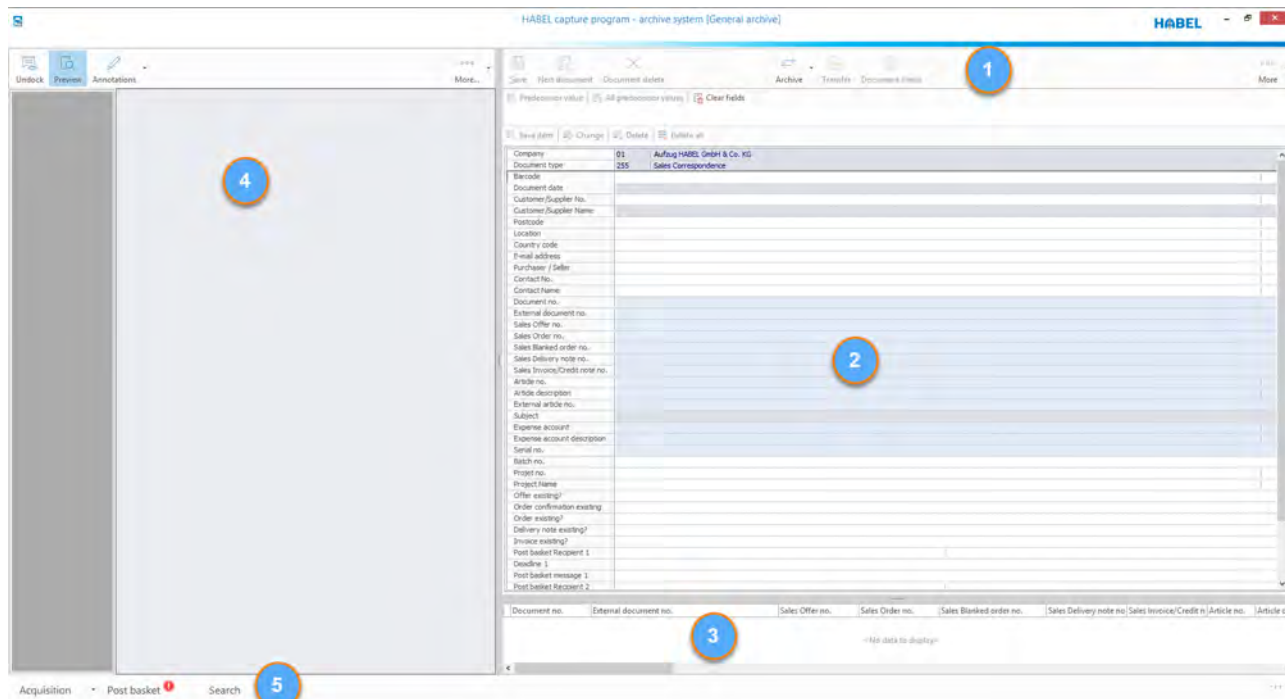
Fig. 1: Layout of capture mask

1   Command bar
2   Search criteria (database fields)
3   Item box
4   Document preview
5   Navigation bar

The mask layout is identical in all capture programs. The only difference is the areas, which are specifically structured according to the requirements of the type of archiving (1).

The capture mask is split into two halves:

■   In the area on the left, you can see the document that has currently been transferred for archiving (4).

■   In the right-hand area, you can expand the search criteria (2).

2.2   Item capture

If field content includes multiple values because there are, for example, multiple articles, order numbers, customer names etc. for one document, item capture is used.

Firstly, enter all the required search criteria (known as header data) such as the document type, document date, available document numbers etc. Likewise add the first value in the field for the item capture (1). Now click the *[Save item]* (2) button. Alternatively, you can also find this command in the Items area of the Capture tab in the ribbon.

The entered data (3) appears in the item data box, provided it has been selected for display in this box. This is configured by the system. Even if not all the data can be seen in the item data box, it has been saved in the background and is available as search terms in the retrieval area. As part of item data capture, you can of course also access stored roots. The corresponding database fields are then added.
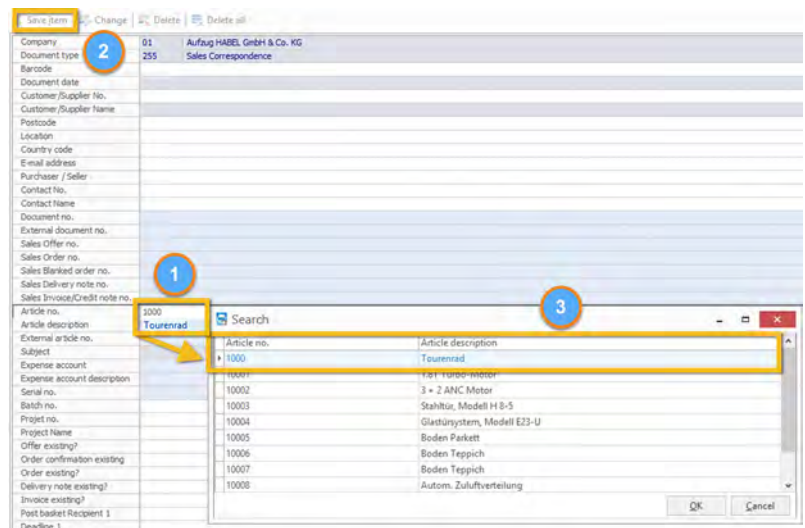
Fig. 2: Item capture

When you press the *[Save item]* button, the item capture fields are cleared. You can then assume further items. Search criteria that you have already entered are retained for you for further item capture. The item capture process can be repeated as often as you wish.

If you have entered the wrong values by mistake, you can change them by clicking *[Change item]*. Save your changes by clicking *[Assume item]*. You can remove individual items with the *[Delete item]* button.

> **!** **NOTICE!**
> If, during capture of additional items, there are fields for which master data access has been stored (header data), the database fields related to the root access must be cleared, because otherwise no new root access can be initiated.

In **Change mode**, the available buttons also change. Use *[Cancel change]* to cancel the change process. The item entry can be deleted with the *[Delete]* button. To cancel the entire item capture and delete all the captured items and other entered search criteria, use the *[Delete all]* button.

2.3 Database fields

The fields available for entering search terms are referred to as database fields, search criteria or index criteria. The display of database fields changes depending on the selected document type, as not every document type requires all criteria for capture and subsequent retrieval. As a general rule, it is best to fill in as many values as possible to facilitate subsequent searching. By default, fields have yellow, light yellow, blue and light blue backgrounds. The color settings can, however, be customized. You can make changes in the command bar under *"More ➜ Extras ➜ Change fonts and colors"* .

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.

To clear all field contents, use the *[Clear fields]* button below the command bar or the function key *[F6]*.

2.4 Master data access

For some fields, **master data access** can be stored. Whether a field has master data access is indicated by the symbol at the end of the database field.

Fig. 3: Master data access

Basically, master data access can be set up in HABEL for all master data that can be supplied. This includes, for example, the following master data: customer/supplier master data, article master data, drawing master data, consignment master data etc.

If you enter a search term in a field with master data access, the master data associated with this field will be used. This is supplied by an external program. There are a number of ways to access master data. You can either exit the field with the *[TAB]* key, press the *[Enter]* key or click on the symbol ▤.

If you click on the symbol without previously entering values in the field, all master data will be displayed. For example, you can use the customer/supplier database to add customer or supplier master data. Enter the customer or supplier name in the *"Name"* field, and you will see a selection box with the hits from the external customer or supplier database. Select the correct entry. Relevant master database fields will then be filled with the correct data.
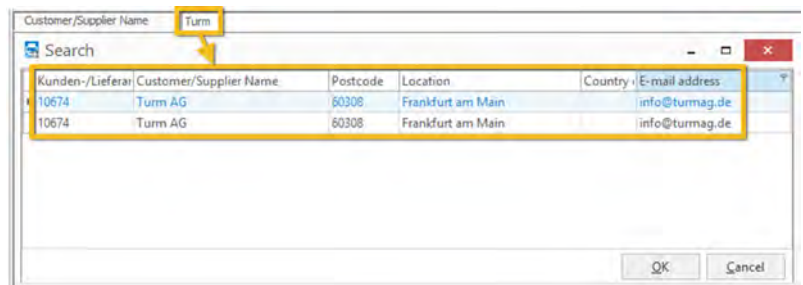
Fig. 4: Master data access selection

> ℹ *The advantage for you: Existing master data is used. Archiving is performed with standardized spelling and complete data.*

2.5 Customize the input mask

You can configure customized settings in the input mask, for example to change the **order of the input fields**. These functions are available in the context menu.

Right-click on an input field in the input mask.

Select the function *"Customize input mask"*. The context menu changes so that the commands *"Save input mask"*, *"Input fields…"* and *"Save as default setting"* are active.

Fig. 5: Customize input mask

You can now re-order the fields by dragging them:

With the function *"Input fields…"*, you can add additional database fields if these are available. A selection box then opens with the available fields. If you only want these changes to be applied for certain document types, select the required document type in the corresponding database field before customizing the input mask. When you save, this setting will only be applied to the selected document type.

Once you have made the changes, save them by clicking *"Save input mask"*. If you do not save the settings, you will be asked if you want to save the changes when you exit the program. If you click *"Save as default setting"*, these settings will apply for all users.

As an administrator, you can also change the user here and make changes for this individual user. If the corresponding rights have not been assigned, the fields will be grayed out.

2.6 Change fonts and colors

In the ribbon under *"Extras"*, you can access commands that allow you to configure the **font and color** settings of the input fields.

Alternatively, right-click on a field to access these commands in the context menu.

By default, **mandatory fields** have a blue background (light blue for mandatory fields with item capture) and **modifiable fields** a gray background (light gray for modifiable fields with item capture).

Use selection boxes to select the corresponding values, and save them with the *[Save]* button. The rights required for this can be controlled administratively. Use the *[Restore defaults]* button to restore the original settings.

Fig. 6: Change fonts and colors

2.7 Transfer of values from previous documents

Another way in which the system facilitates archiving is by transfer-ring values which were assigned to the most recently captured document. Content can be transferred from the document immedi-ately prior.

> ⓘ *If the data has been transferred to the archive since the last capture, no more data is available for transfer to the next document.*

To transfer individual values, the cursor needs to be in the corre-sponding field. You can then duplicate the content by clicking either on the button *[Predecessor values]* below the command bar or by using the function key combination *[Ctrl]+[D]*.

If you want to transfer all the field contents, you can do this using the *[All predecessor values]* button below the the command bar. Alternatively, you can use the function key combination *[Alt] + [Ctrl] + [D]*.
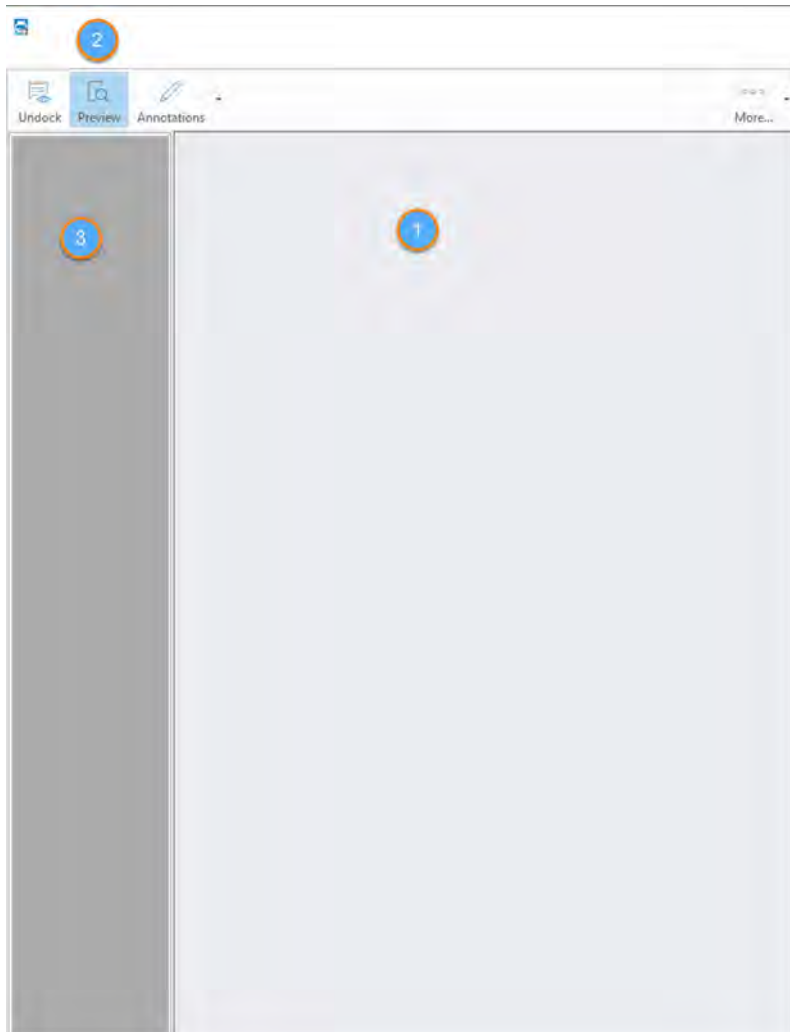

2.9   Settings in the document display

To display the document that is currently being archived so that it is also clearly visible in the document display, you can change the width, height or page. The document can also be reset to its original size. You can also rotate the document (*[Ctrl] + [R]*—clockwise by 90 °) and save it in its rotated state. This means that, if the document was incorrectly captured, you do not have to scan it a second time or print it to the archive.

These functions can be accessed in the *"More"* menu. Alternatively, you can access these functions via the context menu by right-clicking on the document display.

Fit width:	- The document is displayed with the optimum width for the preview window.
Fit height:	- The document is displayed with the optimum height for the preview window.
Rotate:	- The document is rotated clockwise (90 °).
Fit to page:	- The document is displayed with the optimum height and width for the preview window.
Original size:	- The document display is reset to the original size.
Save document rotated:	- After rotating the document, it can be saved in this view. This is particularly useful if documents have been saved the wrong way around, for example.
Settings:	- The default settings of the viewer are configured in this menu.
Print documents:	- Use this function to print the captured documents.

2.10   Add documents to archived documents retrospectively

To add documents to a procedure that has already been archived, you can use a command sequence in the retrieval if you are using *"HABEL OFFICE Integration"*.

Retrieve the required procedure and select it in the *"Hitlist"*. Under *"Edit ➔ More"* select the command *"Add document to procedure"*.

Select the type of capture (with archive printing or scanning). The capture program opens. Depending on the definition, the database fields are pre-allocated with the data from the procedure that you selected in the retrieval.

> *When you retrieve the procedure, two separate entries are generally displayed in the archive with the same search terms.*

2.11   Document check commands

Transfer of the saved procedures to the database only starts when you exit the capture programs. Up to this point, changes are still possible in the document check in the program. For example, further search terms could be entered or whole procedures deleted. You can check the document with the *[Document check]* button in the command bar or with the help of the function key *[F7]*.

Fig. 8: Document check

> The individual functions of the document check are described below.

2.11.1   Transfer to the database

Procedures which have not been saved in the capture programs are not available in the HABEL RETRIEVAL. Multiple documents and procedures can therefore be captured rapidly in succession and changed, added to and checked again as required. The final archiving is done at the end. To do this, you need to initiate transfer to the database. You cannot accidentally forget to transfer a document, because a prompt appears when you close the capture programs.
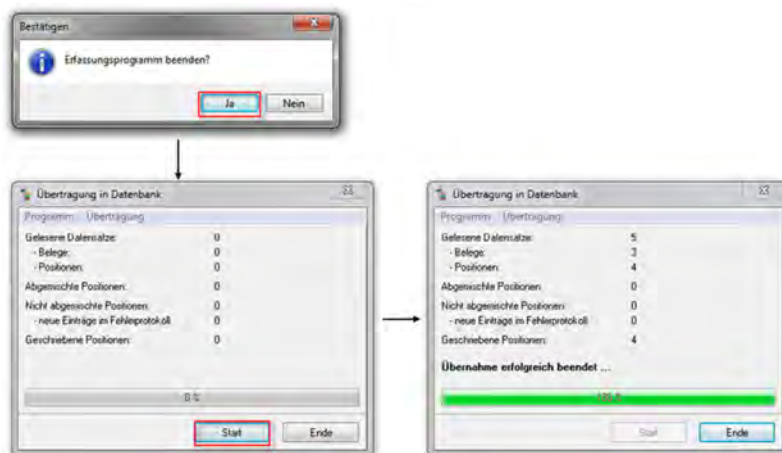
Fig. 9: Close the capture program and transfer to the database

It is optionally possible to deactivate this prompt inasmuch as, if the *"Close capture program"* dialog is dispensed with, the prompt to transfer to the database does not appear either.

> *You can also initiate the transfer at any time without closing the archiving program by using the function key [F10], or by selecting the button [Transfer] in the command bar.*

Records:

Each page produces a record. A document can consist of multiple pages and therefore multiple records. Each item is also classified as a record. If no item has been captured for a document, the page counts as a record and an item. (For item capture, the page itself is not classified as a record, but the first item is regarded as the first record.)

In our example, the following were archived:

- 1 document with 2 pages (*"2 records ➔ 1 document ➔ 1 item"*)
- 1 document with 1 page and 2 items (*"2 records ➔ 1 document ➔ 2 items"*)
- 1 document with 8 pages (*"8 records ➔ 1 document ➔ 1 item"*)

Merged items:

If documents for which index data is available are scanned with barcode recognition, you can see here how many items were merged, i.e. how much index data was added to the document.

Non-merged items:

These generate entries in the error log, as no index data is available for them yet.

Items written:	These incorporate the items that have actually been written, including those items that were recognized as merged items.
Meaning of merge:	You can also view a log for this transfer by clicking on *"Transfer ➔ Log"* .

Log for the transfer example:

2.12 HABEL SCRIPT for archiving

With the additional module *"HABEL SCRIPT for archiving"* and storage of scripts, database fields can be controlled according to specific criteria. **Scripts** are programs that execute tasks. They include, for example, changing of field definitions, starting other applications, transfer of field content to other applications etc.

As a user, you will only notice these functions from the fact that database fields change for archiving after entry of search terms. For example, database fields are controlled depending on other fields: modifiable fields become mandatory fields, e.g. after entry of a particular term in a field or, generally, if a particular field is filled in combination with a defined document type. Checking rules can also be stored which check the content for plausibility when exiting the field.

2.13 HABEL ENCRYPTION

With the additional module *"HABEL ENCRYPTION"*, it is possible to archive documents with encryption. Files archived with encryption can only be displayed again with the corresponding encryption software.

To archive a document with encryption, select *[Archive]*. This opens a selection box in the command bar where you can choose the document group for which encryption has been stored.

The management board, for example. The document is encrypted the moment it has been archived.

Alternatively, you do not need to manually change the document group if you are using the additional module *"HABEL SCRIPT"*. In this case, you can make a separate selection for each document in a combobox in the capture mask.

> *External software is used for encryption. You will receive separate instructions on the administration and use of this encryption software after installing "HABEL ENCRYPTION" and the necessary external software components.*

2.14 Indexing and scanning – separately from each other (HABEL CLIENTINDEX)

The module HABEL CLIENTINDEX can be used for paper documents that are to be assigned their search terms separately from the scanning process, for example if not every workstation has access to a scanner. The advantage of capturing the search terms separately is that you can enter the exact index data that is designated for this document. The person who scans the document later does not need to be informed of this. A further advantage is faster scanning of the document. This can be done in a stack in combination with barcode recognition.

Firstly, a barcode is affixed to the document. Be very careful to ensure that the number range is not also used in another place, such as in combination with the electronic barcode. Otherwise, you can use the barcodes that are in use.

Start the program, and enter the search terms in the familiar capture mask.

If the symbol is not there, please speak to your administrator.

Enter the number of the barcode affixed to the paper document in the *"Barcode"* field. This number will be used later to link the document. Save the procedure. You can then capture further procedures or initiate transfer to the database. The captured data now awaits the associated document, the recognition feature being the barcode.

Scanning of the paper document with barcode recognition is separate from capture, also when the document is scanned in a stack. The captured search terms are available as index data on entry of the barcode number and are added to the document once it has been scanned. This takes place automatically via the *"HABEL Job Server"* in combination with the module *"HABEL AUTOINDEX"*.
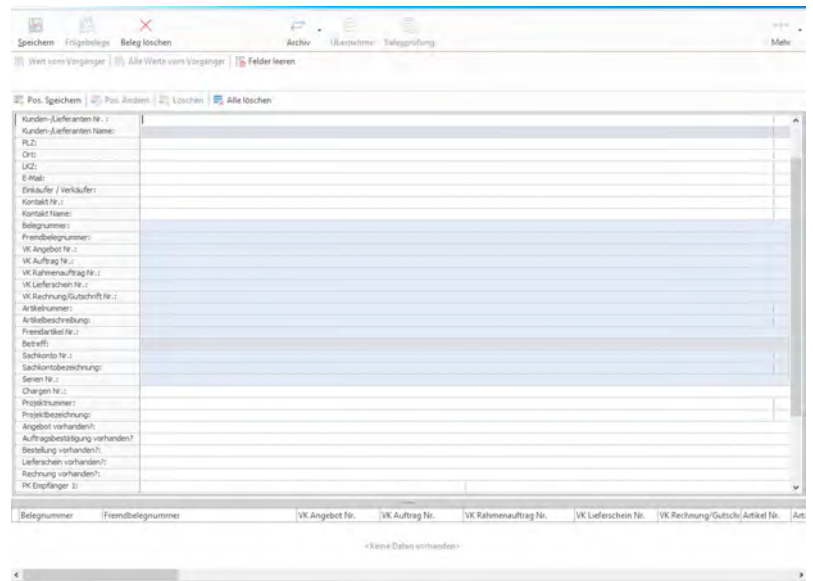
2.15 The electronic barcode

Fig. 10: Barcode field

For example, you receive a customer order as an e-mail, rather than in paper form that can be scanned in. You capture the associated order confirmation in your ERP program. You also want to use the data from this for indexing the e-mail. To do this, you can archive the e-mail using *"HABEL E-MAIL ARCHIVING"* and assign an electronic barcode to the procedure (by clicking on the marked area).

The next free number is assigned. Once you have entered the barcode in the designated place in the external program, this program will provide the captured data for indexing the procedure in *"HABEL"*. Here, the data is added to the associated document (in this case an e-mail).

The capture programs also offer the useful option of graying out all other fields as soon as the electronic barcode has been entered. This prevents manual entering of data that should be automatically transferred from the external application.

In combination with *"HABEL AUTOINDEX"*, electronic barcodes can be assigned when archiving. These numbers are provided for linking to other data from external programs, such as an ERP program.

3   HABEL SCAN

3.1   General

Documents of all kinds that accumulate as part of your business processes, such as order confirmations, delivery notes, invoices, correspondence etc. are captured centrally or at your workstation using a scanner. But what does **scanning** mean?

A **scanning process** digitizes a paper document. The result is a digital image file in a standardized TIFF format. Before the scanning process, the specified search criteria are defined in the input mask and assigned to the document. This allows you to save documents that were previously filed manually in physical folders as an image file in your system. Various control functions during and after the capture process ensure that the documents are fully and correctly archived. For example, if a document is inserted at a crooked angle, the search criteria do not have to be entered again after rescanning. You can also define required fields for mandatory entry of certain search criteria.

You can scan using a TWAIN interface or a KOFAX interface.

Compared to the TWAIN interface, the KOFAX interface has some additional commands relating to setting options for the KOFAX VirtualReScan software to optimize scan quality and for barcode recognition.

Explanation of terms

TWAIN	The TWAIN interface uses a TWAIN driver. TWAIN has been the established standard for data exchange between digital imaging devices (in this case scanners) and programs (in this case HABEL) since 1992. TWAIN is used as an intermediary between devices and programs which cannot work directly together.
KOFAX	For the KOFAX interface, we use KOFAX's VirtualReScan software for communication between the scanner and HABEL. This software offers many different settings to optimize scan quality. With the KOFAX interface, unlike TWAIN, there is often no need to rescan documents which appear to have been poorly captured.

3.1.1   Archiving procedure with HABEL SCAN in combination with HABEL OCRINDEX

In combination with the scanning process in preview mode and the module *"HABEL OCRINDEX"*, together with the appropriate OCR licenses, it is possible to read content from the document and use it for indexing of documents. This speeds up the capture process and also prevents input errors, for example due to transposed digits or long and complex terms. The familiar capture program is used for the scan.

Click on *"Scan with preview"* Additionally, under *"More ➔ Configuration ➔ OCR recognition"* additional settings are available for using the *"HABEL OCRINDEX"* module.

The workstation used for scanning and/or indexing must have access to a free *"OCR license"*.

Abbyy must be installed locally with access to the license server and a valid Abbyy license.

The OCR index settings can be configured by the system administrator.
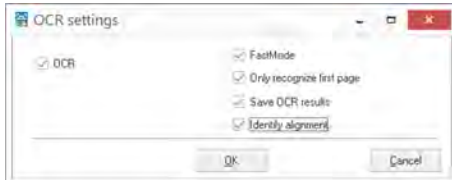
Fig. 11: OCR settings

Activate *"OCR recognition"*	Check this box to activate *"OCR recognition"*. This setting is retained for the document type, provided that you save these settings.
FastMode	Faster *"OCR recognition"* with slight loss of quality.
Only recognize first page	Sufficient if, for example, the information that is important for indexing is located on the first page of the procedure.
Save OCR results	The raw text is also used for *"HABEL FULLTEXT"*.
Identify alignment	Documents in landscape format are shown in landscape format in the document preview. Documents scanned upside down are automatically rotated.

To start the scanning process, press the *[Scan preview]* button. The documents can be scanned in a stack, as indexing and allocation will be done after scanning.

You can view the scanned pages next to the document preview in the overview.
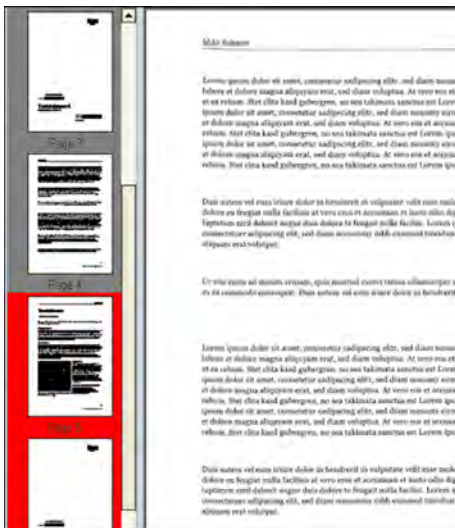
Fig. 12: Document preview

The pages that have not yet been read with *"OCR recognition"* have a red frame. Indexing can still be performed, as *"OCR recognition"* continues in the background.

For indexing, place the cursor over the term. The recognized value is shown as a yellow notice.

Double-click to transfer the value to the field that is currently active.
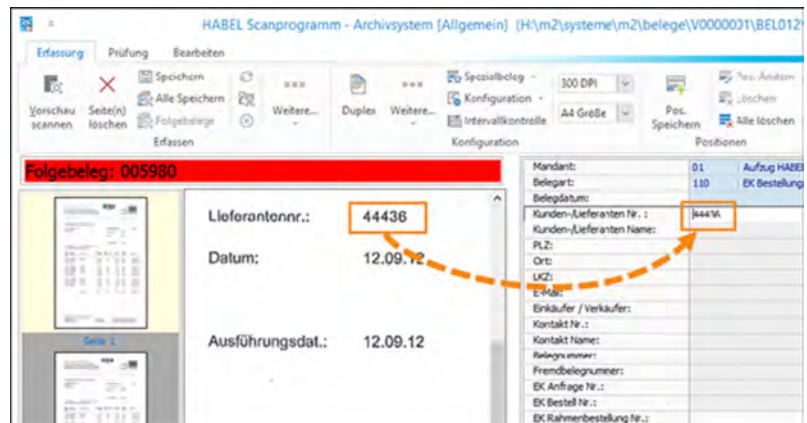
Fig. 13: "OCR recognition"

Alternatively, the value can also be moved to the field using drag & drop. To do this, hold the mouse button down when the yellow notice appears and drag the cursor to the field. Release the mouse button to fill the field.

If you hold down the Ctrl key while double-clicking or dragging-*[&]*-dropping, the terms will be written to the field in succession with a blank space. If you hold down the *[Shift]* key, the blank space will be omitted.

Fig. 14: "OCR recognition" — enter terms successively

To go to the next free field, either press the *[Enter]* key or change the field with a mouse click.

3.1.2 HABEL DOCUMENT NUMBER CHECK

If the *"HABEL DOCUMENT NUMBER CHECK"* module is used, a definable combination of database fields is checked on recognition of the barcode to determine whether this barcode already exists in order to prevent duplicated allocation of barcodes.

If duplicated allocation of these numbers etc. is recognized within the capture program, a message appears asking if you want to disallow archiving. If the archiving is performed anyway, there is an option to mark the corresponding document, for example with a note that the document already exists.

3.1.3 Special document

Over *"Capture* ➔ *Configuration* ➔ *Special document"* you can configure up to ten special documents. These will then be available for special scanning processes where scanning cannot be performed with a document type's normal setting.

Cases of this kind are, for example, documents that were printed when the printer ribbon, ink or toner were running out. These can no longer be read with the normal setting, as the barcode or other data is not sufficiently legible. Another example would be a document printed on colored paper. The legibility of these types of documents is also insufficient. Special document configurations can be generated and set that allow you to scan these documents without problems. These are additional settings for a document type. The advantage of these additional settings is that the original settings for a document type are retained.

If no special document configuration has been activated, the menu item *"Special document* ➔ *Default"* will be checked. Otherwise, there will be a check in front of the special document that is currently active.

3.1.4 Settings in the configuration
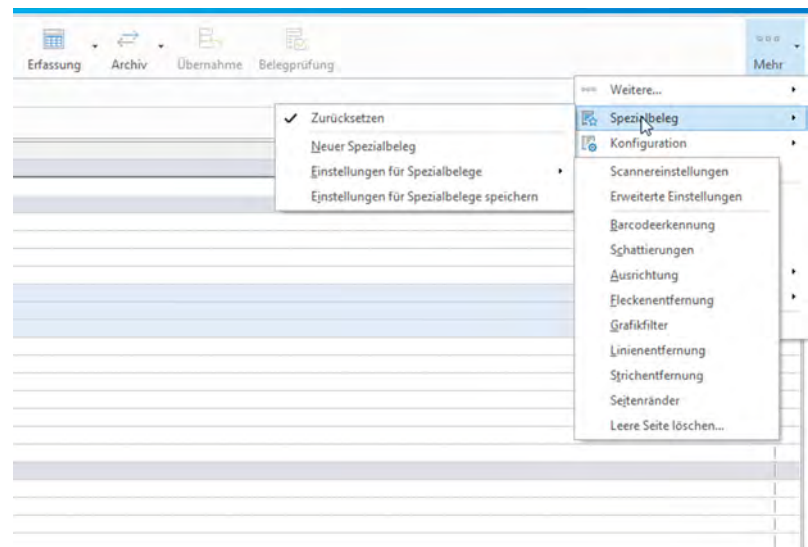
Fig. 15: Capture — Configuration

Under *"More* ➔ *Configuration"* there are various settings for the scan quality.

Ideally, use the *"Scan in test mode"* function first. You can then edit the scanned document until it meets your requirements. The *"Configuration"* group offers functions for the scanner settings and barcode recognition as well as other functions to improve the image quality of the scanned document. By trying out these functions and observing the displayed effects, you will soon routinely be able to set the optimum image quality.

The *"Configuration"* group also contains the two parameters for resolution (DPI) and format that are most frequently needed and used.

Once you have established the optimum settings, save them. They will then still be available the next time you start the program.

Having saved the settings, select *"More ➔ Extras ➔ Scan in test mode"* to exit the test mode.

3.1.4.1   Overview of the TWAIN — KOFAX setting options (comparative)

Comparison of TWAIN and KOFAX
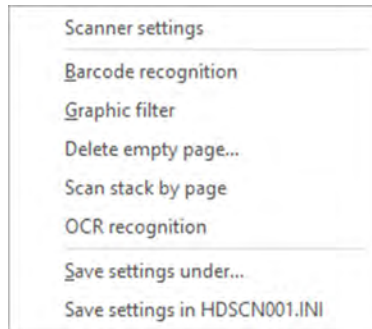
Fig. 16: TWAIN | KOFAX comparison

Scanner settings (TWAIN and KOFAX)
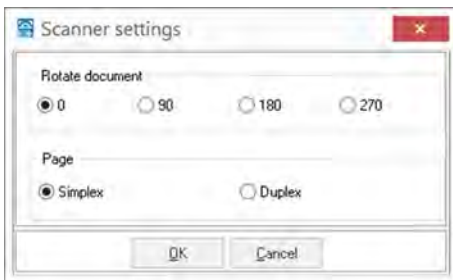
Here you can configure the general settings for how the document is to be scanned: rotated, for example, if you want to scan documents in landscape format. You can also take into account whether both the front and reverse of the documents are to be scanned.

Barcode recognition — TWAIN
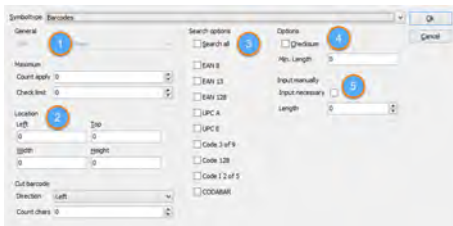
1   General
2   Location
3   Search options
4   Direction
5   Options

In the barcode settings, you can specify:

General	Which barcode type is to be recognized, how many of these are to be displayed and what type.
Location	Where the barcode is located (please note: If you enter data here, the barcode must be placed in exactly this location on the document. If there are any deviations from these settings, the barcode may not be found. We therefore recommend you set this to 0. This means that the barcode can be placed anywhere.) With the settings Left/Top, a dot is added at the respective distance from the edge of the page. The settings Width/Height represent a rectangle with the respective side length (unit = unit under General) placed over an area originating from this dot.
Search options	The type of barcode to be searched for. (Please note: We do not recommend activating the "Search all" function, as this considerably slows the search, which will then include all barcode types.)
Direction	The reading direction (e.g. skewed or upside down barcodes etc.— in this case too, it is advisable not to select too many options, as this slows the search).
Options	Whether the barcodes have check digits.

Explanation of the term check digits:

A check digit is the simplest form of a checksum. The check digit is calculated from the rest of the digits using a particular process. When barcodes with check digits are entered, input errors can be calculated and recognized, because if there is an error then the checksum is not correct.

Barcode recognition — KOFAX
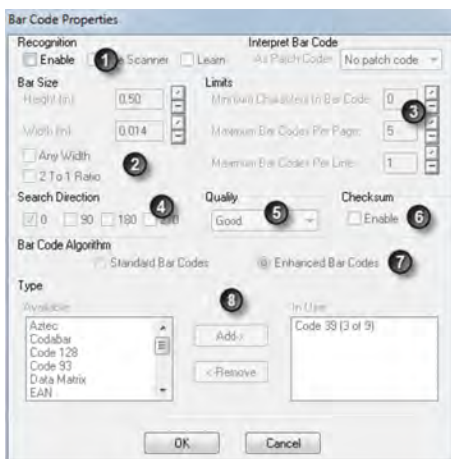
1 Recognition
2 Bar Size
3 Limits
4 Search Direction
5 Quality
6 Checksum
7 Bar Code Algorithm
8 Type

Recognition	Settings in this program can only be configured if Enable is activated. Test settings can be configured using the *"Learn"* functions.

Bar Size	Setting for the size of the barcode.
Limits	Setting for the length of the barcode (0 = any, other values = exact length).
Search Direction	Setting specifying how many degrees (°) of rotation to search for barcodes on the document. 180 means to search for upside down barcodes.

> **!** **NOTICE!**
> You should not activate all the options, as each option selected slows the search.

Quality	Quality of the barcodes.
Checksum	This refers to barcodes with check digits.
Bar Code Algorithm	This also includes non-standard barcodes.
Type	Available barcode types

Delete empty page (TWAIN and KOFAX)

The function *"Delete empty page"* must be activated for use. This specifies that blank scanned pages should be automatically deleted. Define up to what KB size the page is classified as empty.

> **!** **NOTICE!**
> If the byte size is set too high, documents with a small amount of text, and therefore a small file size, may be deleted. The value should therefore be set on the low side, accepting that blank pages which contain a few pixels due to staining, for example, will also be archived.

Save settings (TWAIN and KOFAX)

The changes made in the document type configuration can be saved so that they only apply for the relevant computer number, document type or subdocument type.

If the settings are to apply for all system users, select the menu *"Document type configuration ➔ Save settings in HDSCN001.ini"*.

Advanced settings (KOFAX)

The advanced settings allow you to configure settings in conjunction with VirtualReScan in order to further optimize scan quality. For details, please consult your scanner's VRS manual.

Further setting commands in the KOFAX program

The KOFAX program also offers some additional settings. These relate to:

- Shading
- Alignment
- Spot, line and stripe removal
- Margins

In general, the following applies:

To make changes in the document type configuration, you must have, or have assigned, the corresponding rights. It is also essential that the employee who makes the changes has received special instructions on the scanner functions.

3.1.5 Automatic recognition of document content

Like the normal scanning process with entry of the document type, the documents are scanned in a stack. The criterion is recognized in the background.

This criterion is entered in the defined database field for the document. It may sometimes need to be entered manually. Ideally, *"HABEL AUTOINDEX"* adds further criteria, which are supplied for the document by external programs in the form of index data. A link is established based on the recognized criterion.

For the recognition of all values on a document, automatic matching of the recognized data with external programs and transfer of the document to a workflow based on the recognized criteria, the *"HABEL DOCUMENT READER"* is used.

For further information, see the HABEL Document Reader manual.

3.2 Overview of functions

> ⓘ *The differences in the display of the tabs and associated functions in the Scan with preview version are explained separately ↪ Chapter 3.5 "Archiving procedure with HABEL SCAN in scan with preview mode" on page 30.*

3.3 Capture
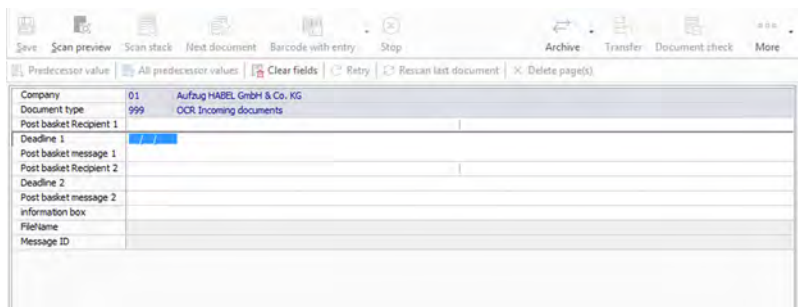
Fig. 17: Capture menu

> ⓘ *In the Capture menu, you can choose from the following commands:*

Save	Saves the document.
Scan preview	The document is scanned in the preview.
Next documents	Add the document currently being scanned to the previous procedure as the next document.
Scan stack	You can scan multiple documents simultaneously. The documents are separated on the pages on which a new barcode is recognized.
Barcode with input	Can only be activated if barcode recognition was previously activated. Then this button can be used to switch the capture mask between all fields or ONLY company, document type.
Stop	The current scanning process is stopped.

Archive	Used to select the individual archives (General, Accounts, HR, etc.).
Transfer	Transfer to the archive database is initiated.
Document check	Change to the document check to check and correct documents that have been scanned and/or archived, but not yet transferred.

> *The functions in the "Document check" tab remain inactive until you activate them. The various actions can then be executed via the document check.*

3.4 Archiving procedure with HABEL SCAN

Once your scanner is connected and the scanning place set up, start the program by clicking the ⬛ icon. This takes you to the HABEL SCAN capture mask.

If you want to scan the document first as a test, use the test mode. This is a good idea if you are not sure about the quality. The scanned document will not be transferred to the database. Activate the test mode by clicking *"More ➜ Extras ➜ Scan in test mode"* .

To scan the document to the database and therefore into the archive, deactivate the *"Scan in test mode"* function by clicking on it again.

If you have connected a number of scanners, you can change the current scanner by selecting *"More ➜ Scanner source"* .

If the next document is to be scanned as the **Next document** in this procedure, place this document in the scanner too. Press the function key *[F4]* or *[Next document]*. The color indicates that this is the next document.

If it is a procedure that consists of several pages, you can place all the documents together in the scanner feed. This is called stack scanning. The term stack scanning is also used when scanning with barcode recognition, if several procedures are placed in the scanner at the same time and separated from each other by a barcode. A barcode is always attached to the first page of a procedure to signal the start of a new procedure.

For stack scanning, select the *[Stack scanning]* button or use the function key *[F3]*. All documents that are in the scanner will be scanned for this procedure. Once all documents have been inserted, you will be notified that the scanner has no more paper. If there are other pages for this procedure, insert these and press the *[Next document]* button or the function key *[F4]*. Otherwise select *[OK]* and continue archiving with the next procedure.

During the scanning process, you can make changes at any time in the document check (↻ *Chapter 2.11 "Document check commands" on page 13*).

In addition to the familiar options in the document check, the scanning program offers a further command for changing recognized barcodes.

To access this, go to the tab or use the *[Delete]* function key.

A window opens where you can manually enter the barcode.

Changing the barcode has various effects:

■ In multi-page procedures, all pages are assigned the new barcode
■ If a barcode is changed to the same barcode before or after this, the procedure is merged. A prompt appears in this case.

The menu for changing the barcode can also be called up by right-clicking on the entry. This context menu has the additional command *[Rescan last page (F5)]*.

Once all commands have been scanned, you can transfer the documents to the database. To do this, click Transfer in the Capture tab or press the function key *[F10]*.

The transfer is also initiated if you close the archiving program (*[Close]* button).

3.5 Archiving procedure with HABEL SCAN in scan with preview mode

Alternatively, you can scan first and then index. You can configure this by selecting *[Scan with preview]*.

> *Each user can decide for themselves which version they want to use. This setting is user-specific rather than workstation-specific.*

Select the *"document type"*. The *[Scan preview]* button is now active. Insert all documents and press *[Scan preview]*. The documents are scanned as a stack and can be seen in the preview. More documents can be scanned and added at any time, no matter what the editing status is.
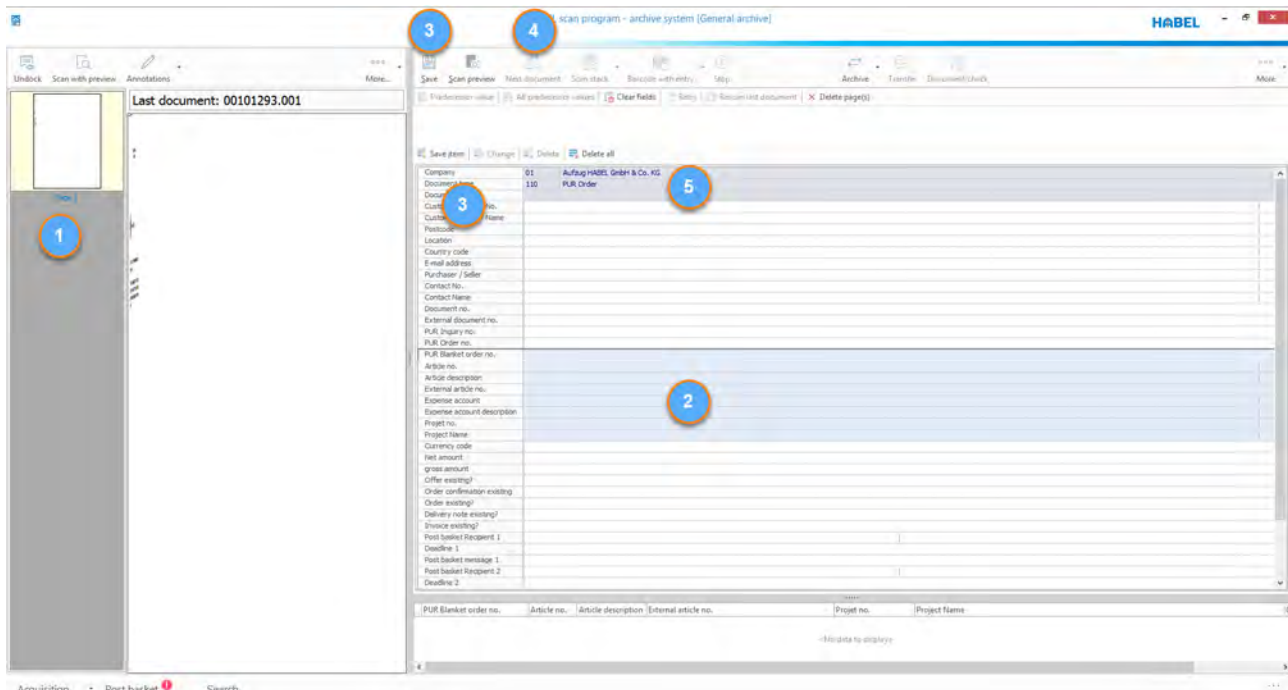
Fig. 18: Scan with preview

On the left, select the document to index from (1) in any order. It will be shown enlarged in the document display (center). Acquire the desired index criteria in the mask (2) and press the *[Save]* button (3) or the function key *[F2]*. To merge multiple documents into one procedure, click on the current page while holding down the *[Ctrl]* key and/or the *[Shift key]* (multiple selection). When saving, the procedure will be merged with the criteria entered. This is independent of the item in the overview. You can assign any documents to the procedure as next documents. For example, page 3 in the overall stack is the second page of the procedure and page 2 is the first page:

Select page 2 first, capture the criteria for this and save these. Then mark the actual next document: in our example page 3. Now select the *[Next document]* button (4) or the function key *[F4.]* Pages which are not needed can be removed from the preview with the *[Delete page(s)]* button (5). When you click the *[Save]* button, the selected documents are placed in the document check and are no longer visible in the preview. If the scanning program is closed without saving after scanning with preview, the documents will still be available the next time it is opened.

3.6 Archiving procedure with HABEL SCAN in combination with barcode

Documents belonging to procedures that are captured in external applications such as the ERP program can be easily linked and indexed using the barcode. Not only does this save time during the capture process, but the data is also transferred in a standardized manner. Which documents are to be scanned with barcode is defined and stored in the configuration. These could be documents such as customer inquiries, customer orders, incoming invoices etc.

> *When capturing a procedure like this, please attach a unique barcode to the document. This barcode must also be assigned to the associated procedure in the external application, e.g. an ERP program. Ideally, a field should be created there called Barcode. The rest of the index data for the procedure is then transferred to HABEL.*

If the scanning program is not already open, start it with the HABEL SCAN symbol. This takes you to the familiar capture mask. Select the corresponding document type. The database fields are hidden, as you do not need to enter data in these. Insert the document in the scanner and select the *[Individual]* button if you only wish to scan one document. Select Stack if you want to scan multiple documents as one procedure, or if there are several procedures, the cover pages of which each have a barcode. The barcode is automatically recognized during scanning and assigned to the document. This separates the procedures.

> *If a stack scanning process with barcode is interrupted, e.g. due to a paper jam, you must first open the scanner and remove the jammed paper. Then check in the document check which document was the last to be captured. You can then either delete the procedure and start scanning the stack again, or insert the documents that are still missing for this procedure into the scanner and assign these to this procedure with the [Next document] button. The scanning process with barcode recognition can then be restarted. Never leave the process to run unattended when stack scanning with barcode recognition, so that you can respond immediately in the event of interruptions.*

If the barcode is not recognized you will see the following message: *"No barcode was detected! The document cannot be saved."*

You can then activate manual barcode entry. These setting options are in *"Barcode with input* ➔ *Manual barcode"* entry. Alternatively, you can use the function key combination *[Ctrl] + [F8]*.

The document/procedure must be rescanned.

> *The message "Barcode not recognized" can only appear for the first procedure to be scanned in the stack, as the system designates documents without a barcode as the next document in the procedure and assigns them to the previous document in stack scanning. It is therefore important not to leave the stack scanning process with barcode recognition to run unattended.*

Alternatively, if activated, an **interval check** can be set. For the scanning process with barcode recognition, this function is suitable for documents that always have the same number of pages and are to be captured using stack scanning.

Settings for this can be found under *"More"*.

Firstly, you can see here what the document type is. Now add entries for the interval, i.e. how many pages between each barcode recognition. If you enter 0 here, no interval will be taken into account.
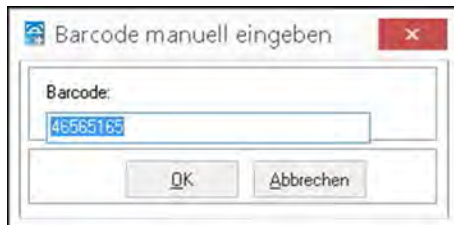

Fig. 19: Configure interval check

Fig. 20: Manual barcode entry

If the barcode is not recognized on the second page, as in this case, you will be asked after scanning the document to manually capture the barcode on it. All documents that were not recognized are shown in succession.

If the function *"Check during scanning"* is deactivated, the check to determine the documents for which a barcode should be recognized according to the interval check is executed later via the document check. This symbol indicates errors .

In this case, change to the *"Document check"*, and select *"Check ➔ Interval check"*. To access individual errors, use the *"To next error"* function.

For document types for which barcode recognition has been configured, the entry fields are hidden. To allow entry of additional search terms for these document types too, such as entry of the post basket recipient, these fields must be unhidden.

Configure your settings with the button *[Barcode with entry]* or by using the function key combination *[Ctrl] + [Shift] + [F8]*.

> *If data is entered manually for document types with barcode recognition, this data takes precedence. Data provided for the document from an external application (e.g. ERP program) is subordinate. It will only be applied to the fields that are empty. If the fields are write-protected, the value entered manually during capture is retained.*

If you want to scan a document with a barcode that is normally not designed for this, you can use *[F8]* or *"Barcode with input ➔ Barcode recognition"* for manual activation.

The HABEL AUTOINDEX module links the document to the associated index data after scanning of the documents and once the external application (e.g. ERP program) has supplied the index data. HABEL calls this process merging. This document can be retrieved in the archive using all "filled" search criteria.

If the index data is not correct or it cannot be assigned, these procedures appear in the *"List of missing host data"* error list. If index data is present and the document is missing, these procedures appear in the *"List of documents not yet scanned"*.

4 *"HABEL OFFICE"* integration

Documents created electronically e.g. in Microsoft Office Word/ Excel, OpenOffice.org Writer etc. can be easily archived without printing or scanning them first. The archive printer is used for this. This function forms part of the HABEL OFFICE Integration and is set up as a virtual printer at every workstation. It is accessed via the printer selection. You can configure settings for different resolutions, formats and colors. The data is transferred to HABEL in TIFF format and can therefore only be retrieved as an image file.

Many of the functions will already be familiar to you from the chapters Archiving (↻ *Chapter 2 "Archiving" on page 6*) and HABEL SCAN (↻ *Chapter 3 "HABEL SCAN" on page 18*). There are some tiny differences in the case of archive printing within archiving.

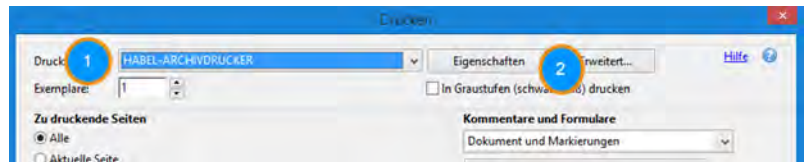## 4.1 Archiving procedure with the archive printer

Fig. 21: Print selection

To archive with the archive printer, the program does not need to be manually opened. Only after creation of the electronic document is the archive printer (1) selected in the printer selection, which starts the archiving program.

Various changes of color, size etc. can be set with the *[Properties]* (2) button.

The search criteria to be captured are entered directly in the mask on the right. As part of the capture, the functions explained in the chapter Archiving (↻ *Chapter 2 "Archiving" on page 6*) can be used, e.g. for transfer of values from the previous document or master data access. To conclude the procedure, save it with the *"Save documents"* function.

The saved procedures are available for checking until they have been fully transferred to the archive. To access them, use the *[Document check]* button or *[F7]* (↻ *Chapter 2.11 "Document check commands" on page 13*).

The search criteria to be captured are entered directly in the mask on the right. As part of the capture, the functions explained in the chapter Archiving (↻ *Chapter 2 "Archiving" on page 6*) can be used, e.g. for transfer of values from the previous document or master data access. To conclude the procedure, save it with the *"Save documents"* function.

To archive further documents with the archive printer, the program does not need to be closed. By calling up the document to be archived and selecting the archive printer in the printer selection, this document is also transferred for archiving. In the case of a procedure that belongs to the previous one, this can be archived as the next document. The document is marked as the next document in the capture mask. The documents are merged and, after transfer to the archive, they are displayed as one procedure and therefore one hit in the retrieval.

Once all documents to be archived at this time have been saved, the concluding step is to transfer them to the database (✋ *Chapter 2 "Archiving" on page 6*).

4.2 Archiving procedure with archive printer in conjunction with OCR index

If you use the *"HABEL OCRINDEX"* module in addition to *"HABEL OFFICE Integration"*, document information can be read for indexing of electronic documents and transferred to the index fields.

"OCR recognition" is activated under the command bar *"More ➔ Configuration ➔ OCR recognition"* .

Fig. 22: "OCR recognition"

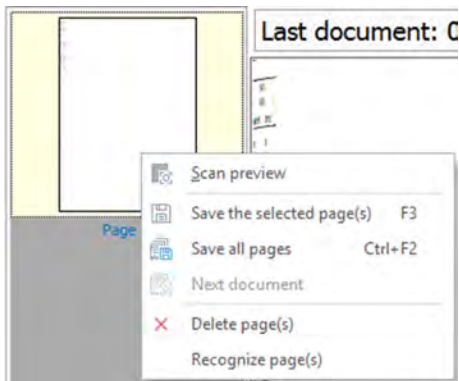|	
Activate OCR recognition	Check this box to activate *"OCR recognition"*. Save this setting under the command bar *"More ➔ Configuration ➔ Save settings as ..."*. This setting will then be retained for the document type.
FastMode	Faster OCR recognition with slight loss of quality.
Only recognize first page	Sufficient if, for example, the information that is important for indexing is located on the first page of the procedure.
Save OCR results	The raw text is also used for *"HABEL FULLTEXT"*.
Identify alignment	Documents scanned in landscape format are shown in landscape format in the document preview. Documents captured upside down are automatically rotated.

Fig. 23: Recognize pages

If you activate *"OCR recognition"* during the archiving procedure, you must also start page recognition. To do this, right-click on the document in the *"preview"* and select *"Recognize page(s)"*.

If you have already defined the document type for *"OCR recognition"* and selected it during the archiving procedure, recognition is automatic. You can view the captured pages next to the document preview in the overview.

Fig. 24: OCR recognition has not yet taken place

The pages that have not yet been read with OCR recognition have a red frame.

Indexing can still be performed, as OCR recognition continues in the background. For indexing, place the cursor over the term. The recognized value is shown as a yellow notice. Double-click to transfer the value to the field that is currently active.

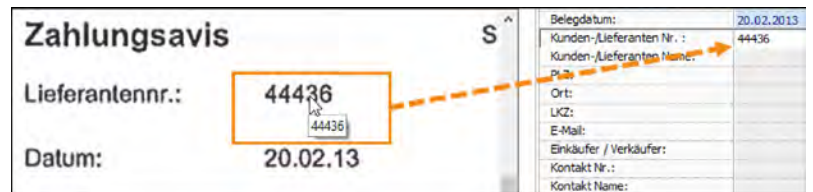*Fig. 25: Indexing*

Alternatively, the value can also be dragged to the field using drag & drop. To do this, hold the mouse button down when the yellow notice appears and position the cursor in the relevant field, which will then be filled when you release the mouse button.

Also see ↳ *Chapter 3.1.1 "Archiving procedure with HABEL SCAN in combination with HABEL OCRINDEX" on page 18* for reference.

4.3 Archiving in the original format

Electronically created documents that may need to be edited again later can be archived in the original format in combination with HABEL OFFICE Integration. To comply with legal requirements, the originally archived version is never overwritten, but instead the new version is archived again.

You can see that a document was archived in the original format if the file format has been entered in the file extension database field.

These documents are also stored in TIFF format (restrictions to particular formats where necessary) so that a view of these documents is always guaranteed. This allows annotations such as marks and notes to be added to these documents. If activated, *"TIFF-formatted"* documents are also included in the full text search and the document preview.

The document is displayed in the original program. The capture mask is nearly identical to the archive printer mask, so the same functions can be used (e.g. OCR index is not possible). You can find information about this in the chapters Archiving ↻ *Chapter 2 "Archiving" on page 6* and Archiving procedure with the archive printer ↻ *Chapter 4.1 "Archiving procedure with the archive printer " on page 35*.

Fig. 26: File extension

4.3.1 Archiving procedure in original format with function button

The function buttons can be found in Microsoft Office Word, Excel and PowerPoint in the *"Start"* tab. These are created when the OfficeAddIn is installed.

Fig. 27: Check in

If they are not present, they can be set up by the administrator. Use the *[Archive]* button to transfer the current document for archiving. You will then be able to enter search terms. Use this button if the document has never been archived before, for example, or if you do not want to archive a retrieved document again with the same search terms.

Fig. 28: Archive

Clicking this button takes you to the familiar capture mask. If it is a document that was retrieved and opened from the archive, the search terms of the original version are pre-allocated and can be changed. Otherwise you will see an empty capture mask that you can fill with the corresponding search terms.

> *In the document preview, you only see the symbol for the document type and the current temporary storage path of the document.*

Use the *[Check in]* button to transfer the current document for archiving without entering search terms. Use this button if it is a document that you have retrieved which is to be archived again (as a further version) with the same search terms.

> *You will not be able to see the archiving procedure with the [Check in]button, as the capture mask is not opened in this case. Transfer to the database is automatic. You will find the procedure in the retrieval as usual with the same data as the original procedure.*

4.3.2 Archiving procedure in original format with *"Archive (HABEL)"* function
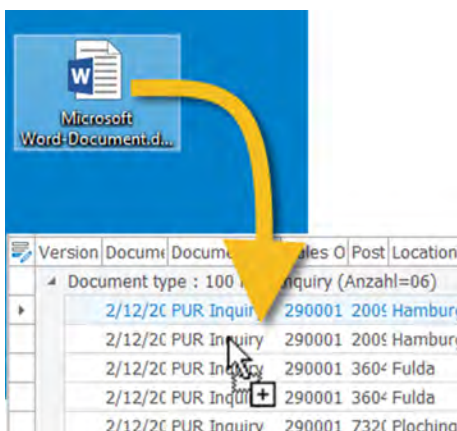
The context menu can be used to send saved files to HABEL for archiving in the original format. If this function is not active, please speak to your customer support agent.
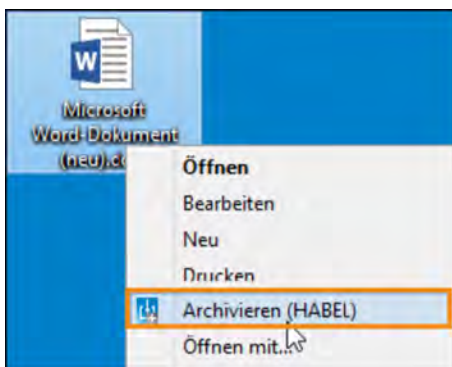
This function opens the familiar capture mask for entering search terms.

Fig. 29: Archiving in the original format

4.3.3 Archiving procedure in original format with drag & drop

If you have data that is to be archived in the original format with a document in the archive and which therefore needs to be saved with the same search terms, you can do this with drag & drop.

Retrieve the procedure in the archive and drag the file to the desired entry while holding down the mouse button. You will then be asked whether you want to archive the file (with the marked entry in the archive). Once you confirm this, the file will be automatically archived. You do not need to initiate transfer to the archive.

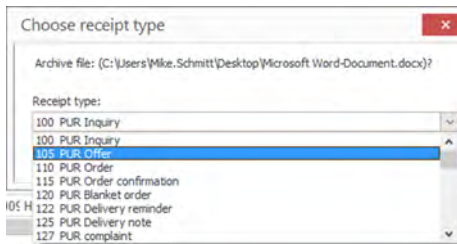*Fig. 30: Archiving with drag & drop*

Fig. 31: Select document type

If configured, you will be asked which document type you want:

The values are transferred from the original document. Exceptions: archiving date, document type and, if applicable, version information.

4.4 HABEL E-MAIL ARCHIVING

4.4.1 General

With *"HABEL E-MAIL ARCHIVING"*, e-mails can be directly archived from your e-mail program. You can do this with function keys or menus which are integrated into the e-mail program. Once you have transferred the e-mail to the archive, you will see the familiar capture mask for entering the search terms. Data from the e-mail can be used to pre-allocate fields. Depending on your e-mail program, there are also various ways to handle e-mail attachments.

4.4.2 HABEL E-MAIL ARCHIVING Outlook

Fig. 32: E-mail archiving
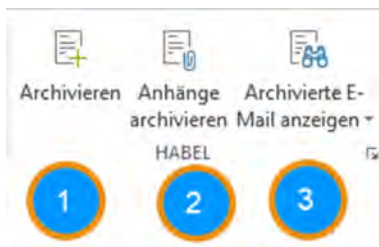
There are three buttons for archiving in the ribbon in Microsoft Outlook.

1   Archive the whole e-mail including attachments.
2   Archive the e-mail attachments. A selection list appears with all the attachments. Select the required attachments from this list. To select multiple entries, press the *[Shift]* key while selecting entries.
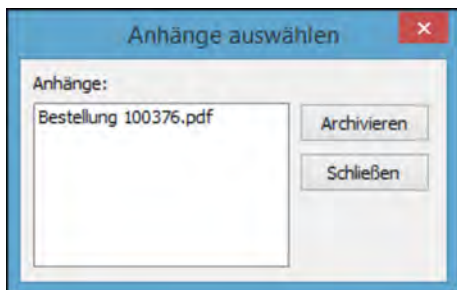3   Open the archived e-mail in the HABEL retrieval.

Fig. 33: Select attachments

The same buttons are also available within the e-mail message and in the context menu of individual e-mails.

Once you have transferred the e-mail or attachments, the capture mask for entering the search terms opens (depending on the definition, some fields are pre-allocated from the data in the e-mail).
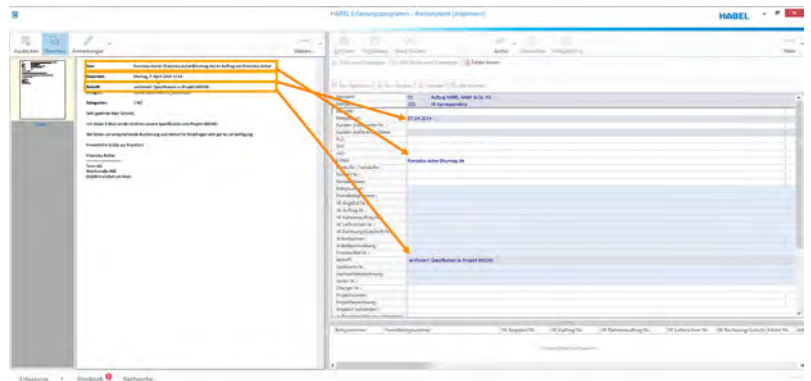
Fig. 34: Capture of an e-mail in HABEL

4.4.3   HABEL E-MAIL ARCHIVING *"LOTUS NOTES"*

In *"Lotus Notes"*, a button is used for archiving. The e-mails and the associated attachments are transferred for archiving. The capture mask is identical to the other capture masks. If required, the complete original e-mail or individual elements (attachments) can be automatically deleted. The e-mail is saved in the original format, provided you are using *"LOTUS NOTES"* Version 6 or later (earlier versions do not support this function).

4.4.4   HABEL E-MAIL ARCHIVING *"Tobit David"*

In *"Tobit David"*, a context menu is used for archiving e-mails and faxes. The e-mails and the associated attachments are transferred for archiving. The capture mask is identical to the other capture masks. If required, the complete original e-mail or individual elements (attachments) can be automatically deleted. The e-mail is not saved in the original format.

4.4.5   HABEL E-MAIL ARCHIVING *"Mozilla Thunderbird"*

"Mozilla Thunderbird" has a button which you can use to transfer the e-mails and associated attachments for archiving. The capture mask is identical to the other capture masks. If required, the complete original e-mail or individual elements (attachments) can be automatically deleted. The e-mail is archived in the original format and can therefore be further processed in *"Mozilla Thunderbird"* after retrieval.

4.5 Archiving in the background

4.5.1 General

Many documents in the archive are archived automatically rather than manually. They can subsequently be transferred from other programs. As a user, you have very few points of intervention in this regard. It is nonetheless important to know these archiving pathways.

4.5.2 HABEL COLD

Archiving with the COLD interface is used when documents are to be transferred from ERP programs, financial accounting programs, operating software etc. The documents created in these external applications do not need to be printed and scanned again. Your customer support agent will provide you with an up-to-date interface description. This explains what data will be provided for the transfer and how.

The external application supplies the created document to HABEL as an image file, together with the associated index data. HABEL archives the document automatically and adds the supplied index data as search terms.

To complete the procedure correctly, company letterheads can be stored for the procedure supplied by the external application so that a complete procedure for displaying the form can be represented in the archive. (Module required for this dynamic storage: HABEL DYNAMIC FORM STORAGE.)

To select *"dynamic form storage"*, go to the retrieval and select *"View ➔ More ➔ Show with form"*.

4.5.3 HABEL INDEXUPDATE

The *"HABEL INDEXUPDATE"* module is used to automatically add index data retrospectively to documents that have already been archived.

The procedure is usually generated using the sale or purchase order number. The order number is transferred by the ERP system to the subsequently created documents, such as production order, delivery note or invoice, and applied to these documents by means of COLD archiving. In the case of later retrieval using the order number, all documents starting from the customer order through to the invoice will be found.

Retrospective indexing allows this process chain to span various document numbers. For example, if you want to be able to retrieve the complete procedure with the invoice number, the invoice number must be added to the documents that have already been archived.

If multiple values now need to be added for a field, because there were multiple delivery notes or invoices for a procedure, for example, the fields can also be retrospectively filled with multiple values.

Example:

When archiving the order confirmation and the delivery note, the subsequent invoice number is not yet known. The search criteria that the documents would be saved with would include the following:

	Order no.	Delivery note no.	Invoice no.
Job	290001	?	?
Delivery note	290001	390001	?
Invoice	290001	390001	490001

If you searched for the invoice number in this case, you would only find the invoice. However, if the whole procedure needs to be found using the invoice number, retrospective indexing is required.

When the sales invoice is archived, HABEL checks whether a delivery note exists with a reference to the same order number. If it does, the invoice number is added to the delivery note that has already been archived. If you then perform a search, the invoice AND the delivery note will be displayed. This solution is individually defined and configured for each document type.

5   Overview of function keys and key combinations

Program	Function	Key (combination)
All	Print	[Ctrl] + [P]
All	Back	[Esc]
Capture	Copy the field content from the previous entry	[Ctrl] + [D]
Capture	Copy all field content from the previous entry	[Ctrl] + [Alt] + [D]
Capture	Counter field (only for defined document types)	[F9]
Capture	Change to the document check	[F7]
Capture	Save documents	[F3]
Capture	Clear fields	[F6]
Capture	Fit to width	[Ctrl] + [4]
Capture	Fit to height	[Ctrl] + [2]
Capture	Fit to page	[Ctrl] + [5]
Capture	Original size	[Ctrl] + [O]
Capture	Rotate the document clockwise	[Ctrl] + [R]
Document check	Change (in the document check)	[F12]
Document check	Save change	[F2]
Document check	Delete page	[Delete]
Document check	Delete stack	[Ctrl] + [Delete]
Capture	Scan stack	[F3]
Capture	Transfer	[F10]
Scan capture	Scan preview	[F3]
Scan capture	Save (scan preview)	[F3]
Scan capture	Save all (scan preview)	[Ctrl] + [F2]
Scan capture	Change barcode (document check)	[Insert]
Scan	Rescan page	[F5]
Scan	Delete stack	[Ctrl] + [Delete]
Scan capture	Rescan page	[F5]
Scan capture	Barcode with input	[Ctrl] + [Alt] + [F8]
Scan capture	Barcode recognition	[F8]
Scan capture	Manual barcode entry	[Ctrl] + [F8]

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