HABEL®
Dokumentenmanagement

ALLES GEHABELT. ALLES GEREGELT.

Enhancement packages

Software manual

Release 2018

Table of contents

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 enhancement packages. 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 CONTRACT MANAGEMENT

"HABEL CONTRACT MANAGEMENT" lets you manage contracts optimally with regard to expiration date, extension and termination and also display them clearly at the touch of a button. The program is used where validity periods and dates of documents need to be monitored. It ensures that you no longer miss any contract cancellation dates, no contracts are simply extended automatically and you are informed in good time of contracts that are about to expire.

Fig. 1: Contract management

For *"HABEL CONTRACT MANAGEMENT"*, a separate database is created with predefined document types and search criteria that are typical for contract management. As part of the archiving process, important contract content is captured as search criteria which then control the monitoring and reminder times. Checking routines and rules, such as calculating reminder dates or establishing required fields, support users with capture so that all criteria required for the contract and its management are fully and correctly captured.

In the standard solution, multiple contractual partners can be captured for a contract. To allow assessments of risks, cost, revenues, payment intervals etc. to be performed after archiving, details can be added in the area from "Evaluation of contract Partner" to "Payment interval". This allows overviews of contracts to be created in the retrieval depending on the desired criteria.

2.1 Distinction between *"fixed-term"* and *"open-ended"*

In *"HABEL CONTRACT MANAGEMENT"*, it is not the wording that decides whether a contract is fixed-term or not but the validity period without declaration of intention. If a contract expires, therefore, without cancellation being necessary, this contract is regarded as fixed-term. If a contract requires cancellation in order for the contract to end at some point, then it is an open-ended contract. Wording such as *"the fixed-term contract will be extended by … if it is not canceled by …"* therefore denotes an open-ended contract rather than a fixed-term contract in *"HABEL CONTRACT MANAGEMENT"*, as it has to be canceled. A fixed-term contract has a previously defined validity period. It always ends automatically at a previously defined time. An open-ended contract has an unlimited validity period. The contractual relationship never ends unless it is actively terminated.

2.2 Reason for drawing up

Drafts, copies and correspondence relating to a contract and, of course, contract cancellations can be archived in *"HABEL DOCUMENT MANAGEMENT"* alongside the original contract. However, no notices are sent except for the original!

> *Only if the reason for drawing up is "Original" is a notice also sent to the defined recipient. Here at least one recipient from the user master data or a user with a free e-mail address must be entered.*

2.3   Calculation of the reminder date

On this day a reminder is sent to the responsible person either through the post basket or by e-mail. The reminder date is calculated based on the conclusion of the contract after deducting the cancellation/extension period and the notice in weeks. The calculation is performed automatically at various operations in the programs. For one, this is calculated directly during the capture when the required fields are filled in. For another, it is possible to change contracts within the retrieval correction or the post basket. Here the calculation is performed when the changes are transferred into the database. Additionally, every time *"HABEL CONTRACT MANAGEMENT"* is started, there is a check whether reminder dates for ongoing contracts have already been passed and must therefore be recalculated.

Reminders that will be calculated and sent outside of the standard, e.g. based on rolling cancellation options and cancellation dates, can be adapted specifically for the customers.
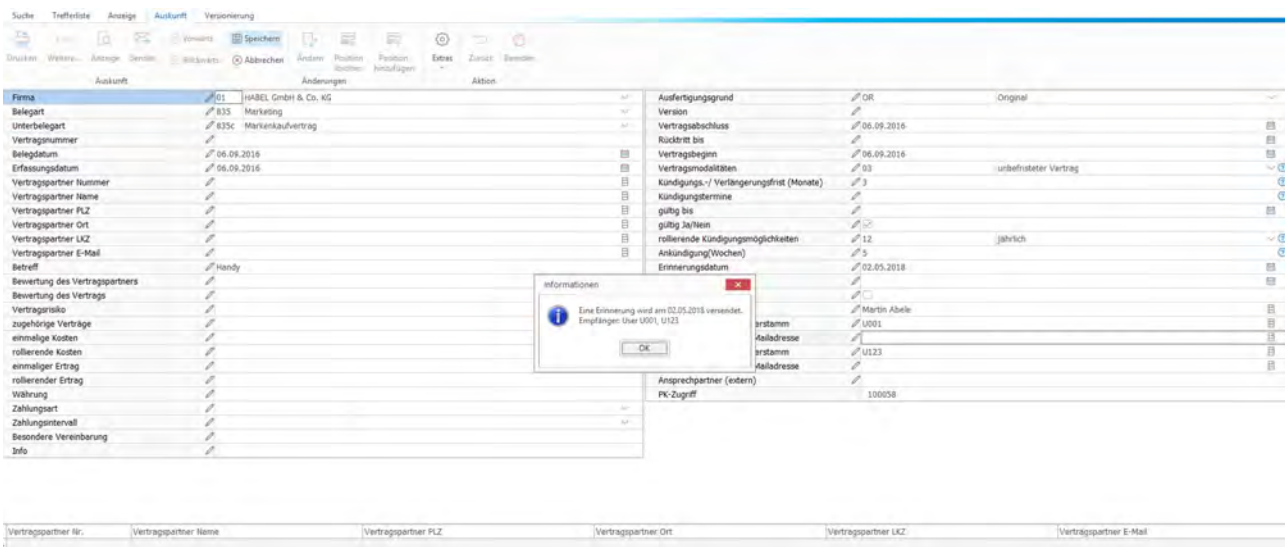

Fig. 2: Edit through the retrieval correction

2.4 Add document to process

If this function is available in your system, you can add a new contract to an already existing process. Depending on the system configuration, the various capture programs are available to you through the hitlist in retrieval under *"More*
➜ Add document to process" . In these programs, a capture mask opens with the same index criteria as the contract selected in the hitlist. By saving and transferring it into the database, the process is enhanced by the new contract.
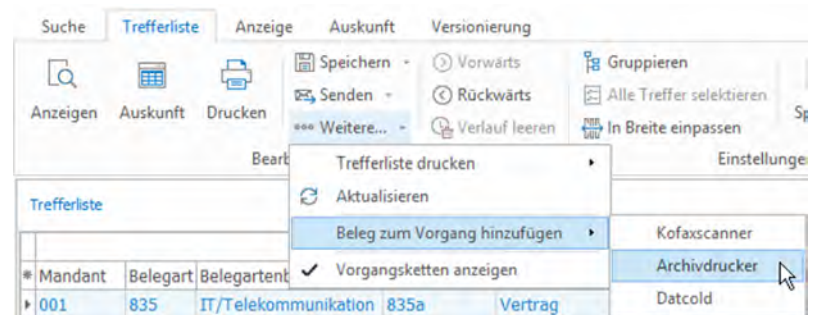
Fig. 3: Add document to process

2.5 Terms of contract

In *"HABEL CONTRACT MANAGEMENT"*, contracts are classified in particular according to their terms of contract. The following explanations can help with understanding the individual terms of contract:

Firstly, a distinction is drawn between whether the contract relates to a **one-off event** or whether it is **fixed-term** or **open-ended**. Secondly, you need to define whether a reminder is required. Notices, particularly about cancellation options, should not be issued for every long-term contract. For example, a rental or employment contract is long-term. Normally, there is no need to indicate that cancellation is possible. Thirdly, for fixed-term contracts, there is still the question of whether the contract can be terminated early or whether it is possible to extend it. These combinations form the seven different terms of contract in *"HABEL CONTRACT MANAGEMENT"* .

The selection of the terms of contract affects other capture criteria. Depending on which terms of contract you select, other criteria are required or deactivated. For a fixed-term contract, for example, the date when the contract period ends, i.e. until when it is valid, must always be specified. For a one-off event, dates like this are not required as this type of contract has no validity period. The individual terms of contract and their effects on other fields are clearly shown below.

2.5.1 Terms of contract: fixed-term, early termination possible

Practical example: Loan contract with unscheduled repayment

These are contracts for which extension is excluded from the outset but which can be canceled early. A notice is issued in good time before the cancellation date. The reminder date is calculated automatically based on the end of the contract, the cancellation/ extension period and the notice in weeks.

Example:

The contract is valid from 1/1/2017 to 12/31/2018. To calculate the reminder date, the cancellation period of 1 month and notice of 2 weeks are deducted from 12/31/2018. This means that a reminder is sent on 11/16/2018.

Ausfertigungsgrund:	OR	Original
Version:		
Vertragsabschluss:	01.01.2017	
Rücktritt bis:		
Vertragsbeginn:	01.01.2017	
Vertragsmodalitäten:	07	befristet, vorzeitig kündbar
Kündigungs.-/ Verlängerungsfrist (Monate):	1	
gültig bis:	31.12.2018	
rollierende Kündigungsmöglichkeiten:	03	vierteljährlich
Kündigungstermine:		
Ankündigung(Wochen):	2	
Erinnerungsdatum:	16.11.2018	
gekündigt am:		
Original bei:		
1. Empfänger aus Benutzerstamm:	U950	Systembenutzer Habel

Fig. 4: Fixed-term, early termination possible

2.5.2 Terms of contract: fixed-term with possibility of extension

Practical example: Leasing (motor vehicle), lease contract

Fixed-term contracts which are not automatically extended but which can be extended. On the reminder date, in good time before the contract expires, a notice that the contract is about to end is issued to allow an extension to be arranged. There is no early cancellation in this case, so these fields are grayed out. If an existing contract should be extended, this can be done through retrieval correction.

Ausfertigungsgrund:	OR	Original
Version:		
Vertragsabschluss:	01.01.2017	
Rücktritt bis:		
Vertragsbeginn:	01.01.2017	
Vertragsmodalitäten:	04	befristeter Vertrag (mit Verlängerungsmöglichkeit)
Kündigungs.-/ Verlängerungsfrist (Monate):	1	
gültig bis:	31.12.2018	
rollierende Kündigungsmöglichkeiten:		
Kündigungstermine:		
Ankündigung(Wochen):	4	
Erinnerungsdatum:	02.11.2018	
gekündigt am:		
Original bei:		
1. Empfänger aus Benutzerstamm:	U950	Systembenutzer Habel

Fig. 5: Fixed-term with possibility of extension

2.5.3   Terms of contract: fixed-term without possibility of extension

Practical example: Contract for services, loan contract, lease contract (long-term lease)

This refers to fixed-term contracts that cannot be extended. A notice regarding the end of the contract is issued, which can be specified in the *"valid until..."* field. Other fields are not relevant.

Ausfertigungsgrund:	OR	Original
Version:		
Vertragsabschluss:	01.07.2016	
Rücktritt bis:		
Vertragsbeginn:	01.07.2016	
Vertragsmodalitäten:	05	befristeter Vertrag (ohne Verlängerungsmöglichkeit)
Kündigungs.-/ Verlängerungsfrist (Monate):		
gültig bis:	30.06.2018	
rollierende Kündigungsmöglichkeiten:		
Kündigungstermine:		
Ankündigung(Wochen):	2	
Erinnerungsdatum:	16.06.2018	
gekündigt am:		
Original bei:		
1. Empfänger aus Benutzerstamm:	U950	Systembenutzer Habel

Fig. 6: Fixed-term contract without extension

2.5.4   Terms of contract: fixed-term, early termination possible (without reminder)

Practical example: Loan contract with unscheduled repayment

These are fixed-term contracts that cannot be extended but can be canceled early. A notice is issued that the contract has expired, but in contrast to other contract types, there is no selection of particular cancellation dates.

Example:

A fixed-term contract is valid from 07/01/2016 to 06/30/2018. The cancellation period is one month and the rolling cancellation options are every quarter. However, a notice that the contract has expired is only sent at the scheduled end of the contract (on 06/30/2018). The cancellation period, the rolling cancellation options and all other fields are merely used for completeness and to provide an overview to the staff members.

Ausfertigungsgrund:	OR	Original
Version:		
Vertragsabschluss:	01.07.2016	
Rücktritt bis:		
Vertragsbeginn:	01.07.2016	
Vertragsmodalitäten:	06	befristeter Vetrag, vorzeitig kündbar (ohne Erinnerung)
Kündigungs.-/ Verlängerungsfrist (Monate):	1	
gültig bis:	30.06.2018	
rollierende Kündigungsmöglichkeiten:	03	vierteljährlich
Kündigungstermine:		
Ankündigung(Wochen):		
Erinnerungsdatum:		
gekündigt am:		
Original bei:		
1. Empfänger aus Benutzerstamm:	U950	Systembenutzer Habel

Fig. 7: Fixed-term contract, early termination possible

2.5.5 Terms of contract: one-off event (without reminder)

Practical example: Purchase contract

One-off contracts that have no contract period or end and therefore do not require any monitoring. All fields related to cancellation/announcement/dates etc. are therefore grayed out. The validity period is not calculated for this contract type.

Ausfertigungsgrund:	OR	Original
Version:		
Vertragsabschluss:	01.07.2016	
Rücktritt bis:		
Vertragsbeginn:	01.07.2016	
Vertragsmodalitäten:	01	einmaliges Ereignis (ohne Erinnerung)
Kündigungs.-/ Verlängerungsfrist (Monate):		
gültig bis:		
rollierende Kündigungsmöglichkeiten:		
Kündigungstermine:		
Ankündigung(Wochen):		
Erinnerungsdatum:		
gekündigt am:		
Original bei:		
1. Empfänger aus Benutzerstamm:	U950	Systembenutzer Habel

Fig. 8: One-off event

2.5.6 Terms of contract: open-ended contract

Practical example: Employment contract, rental contract, lease contract, mobile phone contract

Open-ended contracts which need to be monitored regularly or on set dates. A reminder is issued regularly or depending on the dates selected. In connection with cancellation dates, you can find the required information in the section Cancellation options/dates.

Vertragsabschluss:	01.07.2016	
Rücktritt bis:		
Vertragsbeginn:	01.07.2016	
Vertragsmodalitäten:	03	unbefristeter Vertrag
Kündigungs.-/ Verlängerungsfrist (Monate):	1	
gültig bis:		
rollierende Kündigungsmöglichkeiten:	03	vierteljährlich
Kündigungstermine:		
Ankündigung(Wochen):	2	
Erinnerungsdatum:	18.08.2017	
gekündigt am:		
Original bei:		
1. Empfänger aus Benutzerstamm:	U950	Systembenutzer Habel

Fig. 9: Open-ended contract

2.5.7 Terms of contract: open-ended contract (without reminder)

Practical examples: Employment contract or rental/lease contract

These are contracts that do not need to be monitored and do not require a reminder. The available fields are merely used for completeness and to provide an overview to the staff members and can be defined specifically for customers as obligatory or optional fields.

Ausfertigungsgrund:	OR	Original
Version:		
Vertragsabschluss:	01.07.2016	
Rücktritt bis:		
Vertragsbeginn:	01.07.2016	
Vertragsmodalitäten:	02	unbefristeter Vertrag (ohne Erinnerung)
Kündigungs.-/ Verlängerungsfrist (Monate):	3	
gültig bis:		
rollierende Kündigungsmöglichkeiten:	12	jährlich
Kündigungstermine:		
Ankündigung(Wochen):		
Erinnerungsdatum:		
gekündigt am:		
Original bei:		
1. Empfänger aus Benutzerstamm:	U950	Systembenutzer Habel

Fig. 10: Open-ended contract without reminder

2.6 Cancellation options/dates

The rolling cancellation dates specify the rhythm in which the contract can be canceled, e.g. monthly, quarterly or yearly. The earliest possible date of cancellation can also be specified. In the *"HABEL CONTRACT MANAGEMENT"*, the rolling cancellation option *"annually"* is entered in this case.

For the *"Cancellation dates"*, the first date when the contract can be canceled is entered (e.g. for a mobile phone contract where the earliest cancellation date is two years after the start of the contract). In this case, due to the first possible cancellation date on 07/01/2018, with a period of three months and a notification period of four weeks, the recipients of this reminder are notified for the first time on March 4, 2018. Subsequently, due to the rolling cancellation option, the reminder is sent each year based on the contract start on 07/01/2016, minus the cancellation period and the notice on March 4.

Ausfertigungsgrund:	OR	Original
Version:		
Vertragsabschluss:	01.07.2016	
Rücktritt bis:		
Vertragsbeginn:	01.07.2016	
Vertragsmodalitäten:	03	unbefristeter Vertrag
Kündigungs.-/ Verlängerungsfrist (Monate):	3	
gültig bis:		
rollierende Kündigungsmöglichkeiten:	12	jährlich
Kündigungstermine:	01.07.2018	
Ankündigung(Wochen):	4	
Erinnerungsdatum:	04.03.2018	
gekündigt am:		
Original bei:		
1. Empfänger aus Benutzerstamm:	U950	Systembenutzer Habel

Fig. 11: Cancellation options

If the possibility of cancellation is any time, a notice will be sent at the end of every month. The setting See dates of cancellation only applies when the rhythm of the cancellation dates does not always have the same timespan between the cancellation options.

Example:

An example of a rhythm with different timespans is the possibility of canceling every year on 06.30. and 09.30. In these cases, select cancellation dates and enter the corresponding dates in the Date of cancellation field:

Mm.dd.yyyy	If a fixed date needs to be entered.
mm.dd.	If a day and a month need to be entered for each year.
Mm.dd.;mm.dd.;mm.dd..;...	If several dates need to be specified for each year.

Example:

Kündigungstermine: 30.06.2017

First cancellation date or rolling cancellation date from 06.30.2017.

Fig. 12: Example of a fixed cancellation date

Example:

Kündigungstermine: 30.06.; 30.09.; 30.12.

Cancellation on 06.30.; 09.30. and 12.30.

Fig. 13: Multiple cancellation dates

The *"Canceled"* field can contain the status *"Yes"* or *"No"*. This status can either be entered manually by the staff member in the retrieval correction or through the post basket or it can be automatically performed through the *"HABEL CONTRACT MANAGEMENT"* if a cancellation date is entered.

2.7 Setting the validity

The *"Valid"* field can contain the status *"Yes"* or *"No"*. The validity period is calculated based on the date of validity and the start of the contract. If there is no date of validity or if it is higher or equal to the current date and if, at the same time, the field for the contract start is not empty and lower or equal to the current date, a contract is considered valid. If the validity period must be changed manually, this can be done through retrieval correction.

2.8 Plausibility check when saving

The data entered is checked as soon as the contracts are captured. If values are missing or entered values are not plausible, a message to this effect appears when saving or scanning documents. If all the content is plausible, the first notice date is calculated in the background and shown in a window for information. For manual changes, the internal calculations and checks are also performed in retrieval correction or the post basket. When the document is saved, an information window pops up that briefly shows the reminder date and recipient.
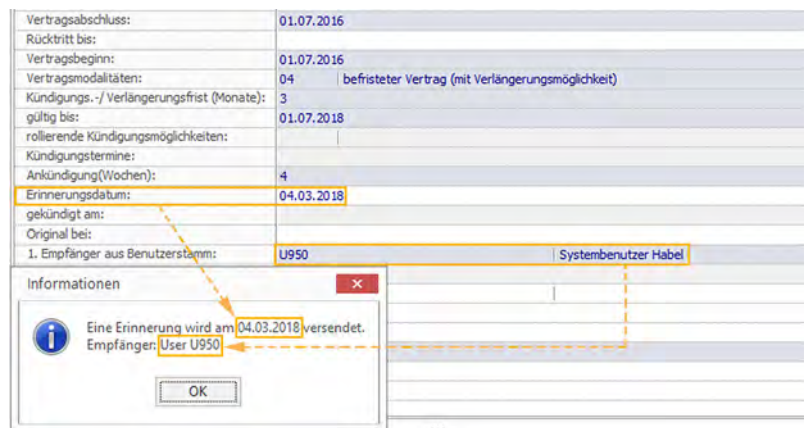
Fig. 14: Plausibility check when saving

3   HABEL PERSONNEL MANAGEMENT

"HABEL PERSONNEL MANAGEMENT" was developed primarily in order to protect sensitive personnel documents from unauthorized access. This is ensured by a stand-alone database which can be fully access-protected and/or restricted to certain rights with the *"HABEL USER MANAGER"* (see Administration user manual). Corresponding encryption software can also increase the security level so that administrators, for example, cannot see documents. The additional encryption is not dealt with in this section.

Please note that for the description of *"HABEL PERSONNEL MANAGEMENT"*, we have used the standard solution in this manual. It can also be customized. The most common personnel-related document types and search criteria are defined in the standard solution.

All the familiar capture programs can be used for archiving:

- Archiving with scanner
- Archive printer
- In the original format
- By e-mail connection

The descriptions that follow are based on the archive printer (in HABEL OFFICE Integration). The capture is in the area on the left and the document preview on the right.
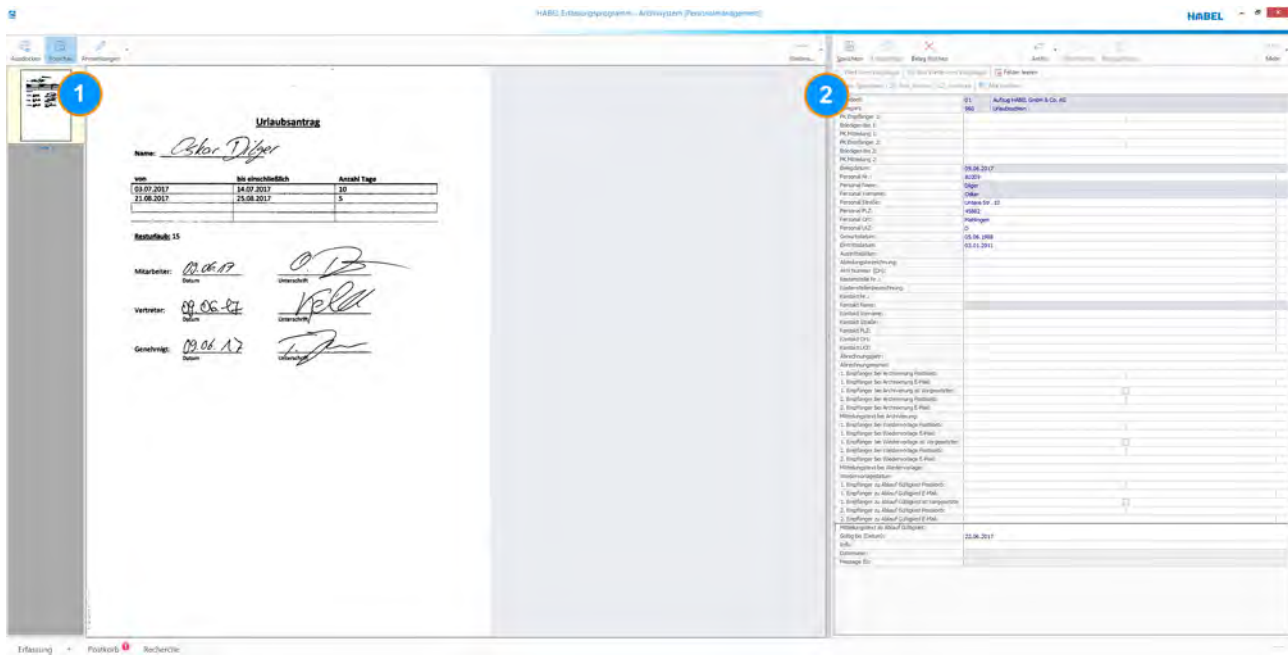
Fig. 15: Capture into personnel management with the archive printer

To ensure effective and correct management, you should bear in mind various points when archiving the documents. The special features are detailed individually below.

The familiar criteria such as Document type, Project no., Subject etc. must be entered in the capture mask.

3.1 Personnel data

Fig. 16: Personnel data

Personnel data must be entered for almost every personnel document. Ideally, the personnel data should be based on personnel master data. When the personnel name is entered, all the other data is added automatically. The date of admission and date of retirement, for example, should also be maintained in the master data based on the rules in the standard solution such as notice in the case of anniversaries. If no master data can be supplied, the *"HABEL MASTER DATA EDITOR"* can be used, cf. HABEL MASTER DATA EDITOR.

3.2 Contact details

Fig. 17: Contact details

Some personnel documents either only have an external contact person or refer to both an employee and an external contact person. For example, a general notice from the health insurance fund may be archived that does not make any reference to an employee. Alternatively, a document from the health insurance fund could also relate to a specific employee so that the contact and the employee should be filled in.

In this case, too, corresponding master data can be used externally or via the *"HABEL MASTER DATA EDITOR"*.

3.3 Information flow

3.3.1 Recipients during archiving

Fig. 18: Recipients during archiving

As soon as a personnel document is archived, you can specify whether it is to be forwarded to one or two recipients. For example, a sick note could be placed directly in the departmental manager's post basket to inform him or her about the times of absence.

Via post basket	Enter the post basket recipient's name.
Via e-mail	Enter the recipient's e-mail address.
To manager	Select the checkbox (recipient data is gathered in a similar way to the information stored in the personnel master data).

If one of the fields is filled in, the other two are deactivated for further entries. The second recipient is defined separately. In addition to the standard text that is forwarded with the information to the recipient, further custom text can be entered in the *"Message text at archiving"* field.

3.3.2 Recipient follow-up

Fig. 19: Recipient follow-up

A follow-up date can also be set when archiving. To do this, fill in the *"Follow-up date"* field. The entered recipients will be informed on this date (information medium depends on entry). In this case, too, only one of the fields is used. Additional message texts further to the defined standard texts can also be entered here on a custom basis.

3.3.3 Recipient for expiration of validity

1. Empfänger zu Ablauf Gültigkeit Postkorb:	
1. Empfänger zu Ablauf Gültigkeit E-Mail:	
1. Empfänger zu Ablauf Gültigkeit ist Vorgesetzte	☐
2. Empfänger zu Ablauf Gültigkeit Postkorb:	
2. Empfänger zu Ablauf Gültigkeit E-Mail:	
Mitteilungstext zu Ablauf Gültigkeit:	
Gültig bis (Datum):	. .

Fig. 20: Recipient for expiration of validity

Some documents have a validity period, on expiration of which a notice should be issued (e.g. sick note). The date when the validity expires is entered in the *"Valid until (date)"* field.

Customized message texts regarding validity expiration can also be entered. The *"Valid Yes/No"* field is set via the validity date. This allows the search for currently valid documents to be refined. For example, you could search for valid sick notes only. The validity field is set even if no recipient is entered.

The personnel management system also manages reminders of dates/events (e.g. anniversaries). Certain data must be available for these reminders. The data is either provided by external databases or captured in the MASTER DATA EDITOR. The data relevant for this is as follows:

Birth date	This date enables the manager to be informed of the employee's birthday.
Date of admission	Based on this date, the manager is informed of the employee's anniversaries, if parameter *"1"* is set for Anniversary active.
Date of retirement	Based on this date, the parameter for Anniversary active is set to *"0"* and no more reminders are sent for this employee.
Anniversary active	This field can be used to set whether notices are to be sent on the anniversaries of active employees.
Post basket address/e-mail address of manager	Notices are sent to this address if the field is checked accordingly.

A daily check for anniversaries or birthdays is performed via a job in the HABEL job server. The corresponding manager is informed two weeks before the relevant date in each case. In the standard solution, notices of anniversaries are every 10 years and birthdays every year.

3.4   Special features of document types in the standard solution

Document type	Rules
Reminder	The follow-up date is calculated on the basis of the document date (+2 years), so that the reminder can be retrieved from the archive at this time.
Employment contract training contract	The Payroll Accounting department or the training officer, for example, could be informed with a notice on archiving.
Residence/work permit	If only the "Valid until" date is used, the "Valid Yes/No" field will be set to No when validity expires. If another notice is additionally defined in connection with the "Valid until" date, there is a message to this effect.
Medical certificate	To inform managers, a notice on archiving could be used in this case. In addition, there can be a response to the validity of the medical certificate via the "Valid until" date. (If only the "Valid until" date is used, the "Valid Yes/No" field will be set to No when validity expires.) If another notice is additionally defined in connection with the "Valid until" date, there is a message to this effect.
Occupational accidents/accident report forms	Inform safety officer with a message on archiving.
Appraisals	Use the "Follow-up date" for follow-up interviews or regular appraisal appointments.
Company cars	Use the "Follow-up date" for e.g. reminders about expiry of leasing contracts (for the purposes of setting up a new contract).
Sick note	Use the "Valid until" date and a notice in this context in order to verify the return of the employee or call for an extension if required.
Maternity leave/ parental leave	Use the "Follow-up date" to make the necessary arrangements for the employee's return.
Holiday form	Use the "Valid until" date and a notice in this context e.g. to arrange holiday cover.
Garnishments	Use the "Follow-up date" to monitor any deadlines.
Disability pass	Use the "Follow-up date" if there are time limits.
Job description	Use the "Valid until" date and a notice in this context for time-limited job advertisements.
Training/seminars	Use the "Follow-up date" for training that needs to be repeated after a certain time (e.g. first-aid course).
Wage agreement	Use the "Valid until" date and a notice in this context for the progress of wage agreements.
Authorizations	Use the "Valid until" date and a notice in this context in order to be able to respond promptly to time-limited authorizations.
References/certificates	Use the "Follow-up date" if there are time limits or if renewals are required.

4 HABEL Board of Directors Archive

In any company's board of directors, there are documents that need to be protected from access by the staff. With HABEL's Board of Directors Archive, only selected persons are allowed to access sensitive data. It is also possible to encrypt the documents when they are archived to prevent unauthorized access by the administrator.

4.1 Archiving

All the familiar capture programs can be used for archiving: Archiving with scanner, archive printer, in the original format or by e-mail connection. The descriptions that follow are based on the archive printer (in HABEL OFFICE Integration).

Because the Board of Directors Archive uses a stand-alone database, you need to select the corresponding archive in all capture programs.

In the area on the left (1), you will see the document view, and on the right (2) the capture mask:
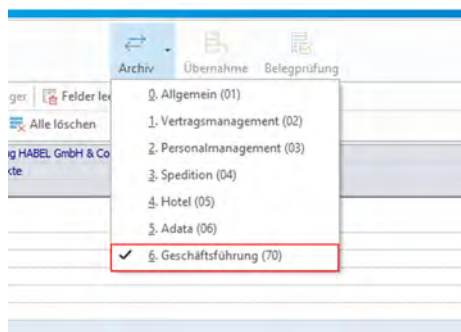
Fig. 21: Archiving
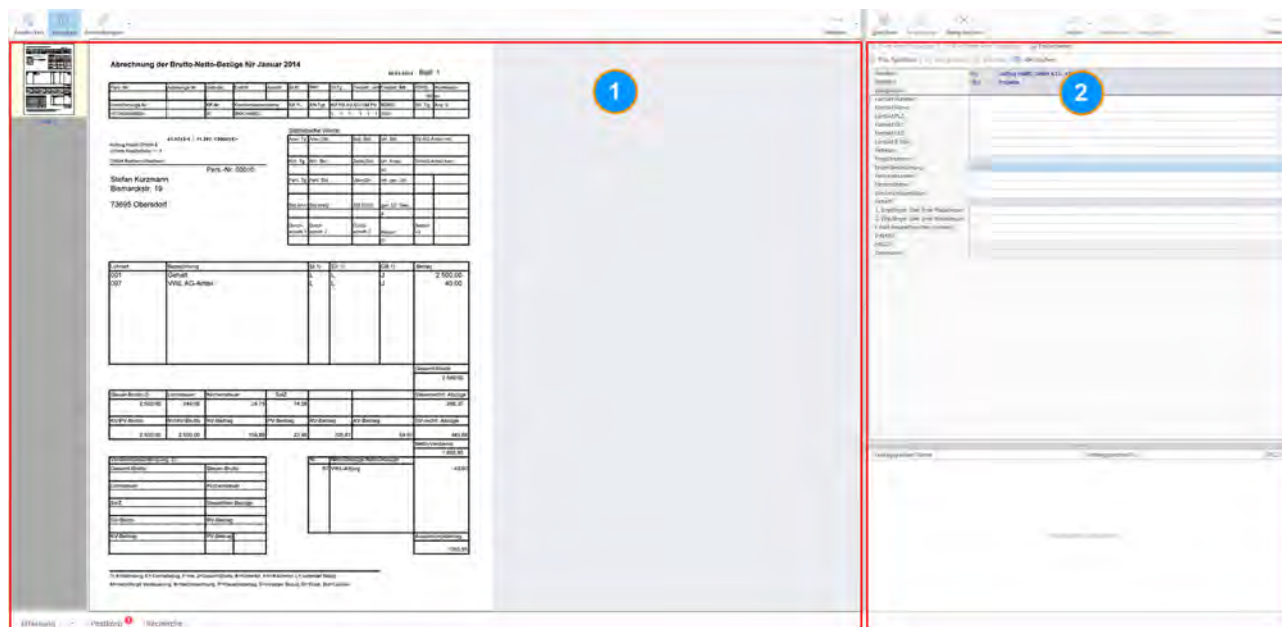
Fig. 22: Document preview — Capture mask

| 1 | Document preview | 2 | Capture mask |

Fig. 23: Special features

To ensure effective and correct management of your documents, you should bear in mind various points when archiving. The special features are explained below.

(1)	The familiar criteria such as Document type, Document date, Subject and the Information box must be entered in the top and bottom sections of the capture mask.
(2)	Ideally, master data from a database of an enterprise resource planning system or another master database is stored here. In addition to customer and supplier contact details, the information can also include other typical contacts for the board of directors. When the contact name is entered, all the other data is added automatically.
(3)	The auto-adaptive project master data for project numbers and names is a convenient solution. Project names and numbers that have already been used are automatically saved and can be modified with the aid of the additionally supplied *"HABEL MASTER DATA EDITOR"* (cf. ↳ *Chapter 5 "HABEL MASTER DATA EDITOR" on page 26*).
(4)	These can be based on the personnel data from a personnel database.
(5)	To activate automatic follow-up for a document, both fields must be filled with information. The follow-up takes place on the follow-up date in the form of a notice to the e-mail address entered.

4.2 Document types in the Board of Directors Archive

Wage/salary	As well as payslips, other pay-related documents can be stored here such as payroll journals, statements of contributions paid or target agreements etc.
Finances/controlling	Archiving of bank documents and documents from Controlling.
Projects	Storage of documents for different projects. Direct allocation to projects is possible via the project master data.
Law	Can be used as a general knowledge database for retrieval of legal texts and jurisdictions, and also for the management of legal cases.
Committee/minutes	Management of minutes of meetings and documents, various committees of which the directors are members.
Statistics/evaluation	For archiving of various calculations and planning criteria.
Management correspondence	For storage of all internal and/or external correspondence.
Contract	Management of all contracts such as employment, rental and purchase contracts etc.
Balance sheet/annual accounts	Structured archiving and viewing of annual reports etc.
Insurance	Documentation of damage or loss.

4.3 Encryption

The integration of encryption software can increase the security level so that administrators, for example, cannot see documents. Files archived with *"HABEL ENCRYPTION"* can only be viewed with the corresponding encryption software.

To archive a document with encryption, use the tab *"Capture ➔ Archive ➔ Archive"* This opens a selection box where you can choose the document group which has been stored for encryption. The document is encrypted the moment it has been archived.

External software is used for encryption. External licenses are not included in the Board of Directors Archive package. When using encryption, you will receive individual instructions on how it works and how to use it.

4.4 Board of Directors Archive in the HABEL RETRIEVAL

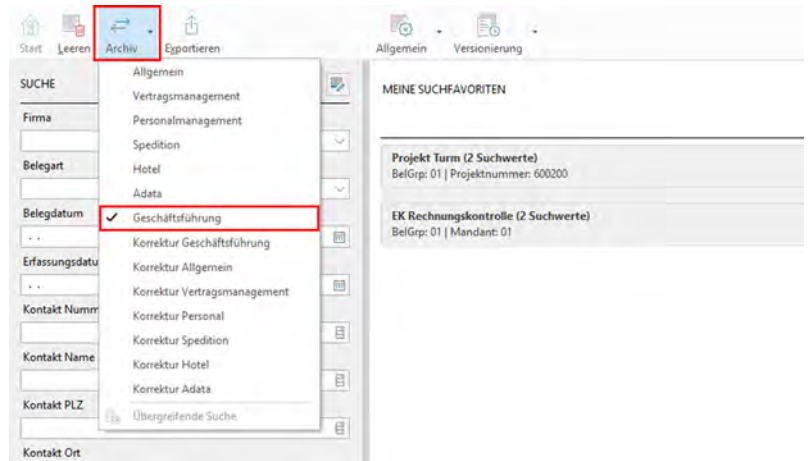To call up the *"Board of Directors Archive"* in the *"HABEL RETRIEVAL"*, select:

Fig. 24: Database "Board of Directors"

The *"Board of Directors"* database can only be opened by users who have been assigned the corresponding access rights under rights management.

All stored search criteria/fields for finding documents in the Board of Directors Archive will then be available in the *"HABEL RETRIEVAL"*:

Other customized document types/ fields

Other customized document types/fields Other document types or search criteria above and beyond the standard definition are, of course, also possible. We are happy to develop these jointly in a system specification discussion and implement them on a custom basis for your Board of Directors Archive.

5   HABEL MASTER DATA EDITOR

Multiple master databases can be managed within the *"HABEL MASTER DATA EDITOR"*. The corresponding master data can be selected with the selection bar.
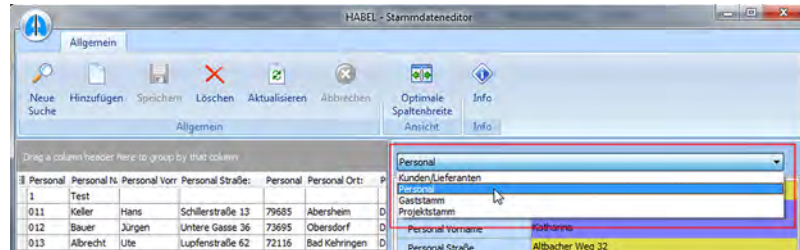
Fig. 25: Selection of databases for the master data

Once you have selected the master data you require, all entries to date can be called up using the *"search function"*. Alternatively, click the *[Add]* button to activate the capture mask.
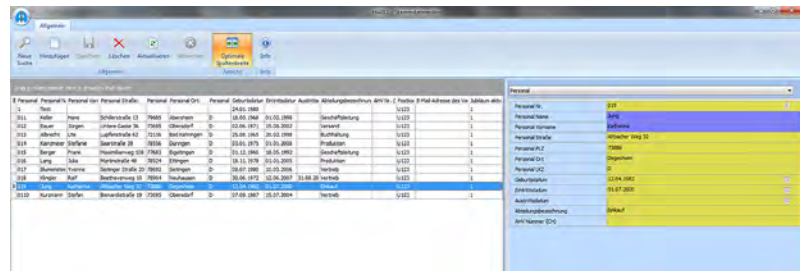
Fig. 26: Selection of the master data

When the selection is displayed, the search function changes and allows a new search. When you click the *[Add]* button, this button becomes inactive.

You can now save the data. Enter all data in the capture mask (blue fields are mandatory fields), and save it, or cancel the procedure. The *"Add"* function can also be used if all entries are to be searched and displayed first. To edit an entry, you simply need to select it, and then you can change it in the capture mask.
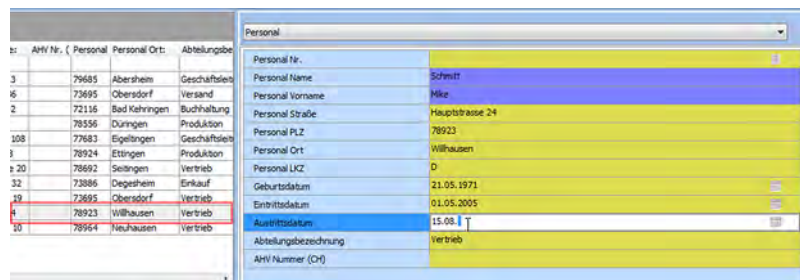
Fig. 27: Edit master data

Entries that are not required can be deleted from the database. Use the *"Refresh"* command to load all the latest data while adding new data.

6   HABEL DOCUEDITOR

6.1   General

The *"HABEL DOCUEDITOR"* is used to create documentation, instructions or manuals from archived documents automatically. All the parts to be used in the document being compiled need to have been archived first in HABEL. Each individual part can be updated. This ensures that you have access to the latest version of each part when creating the complete document. The required parts can be compiled automatically using index criteria, with assured consistency. For example, documentation can be created, managed and updated for each individual article. Complete documentation can be generated from all parts using the article numbers listed in the order, without any parts being forgotten or out-of-date descriptions used. Consecutive numbering and a table of contents can also be included. Output is in PDF format.

The parts which are to be used in this documentation are generally transferred from the ERP system to HABEL in an index file. The table of contents and layout of the documentation are managed in HABEL. To this end, item data is provided for the documentation in addition to the usual header data such as date, customer number, customer name or subject. This item data refers to other documents which are already archived in HABEL.

The index file is transferred to HABEL via the standard interface and can then be used in the *"DOCUEDITOR"*.

6.2   Program startup

The management interface of the *"DOCUEDITOR"* is started from the hitlist. To do this, the index file transferred from the ERP system must be retrieved. On the basis of this index file (displayed in the retrieval as a document in the original format), the *"DOCUEDITOR"* can be started by right-clicking in the hitlist (1).

In the context menu, this is offered under *"Execute external program (2)*
➔ *Start HABEL DOCUEDITOR (3)"* :
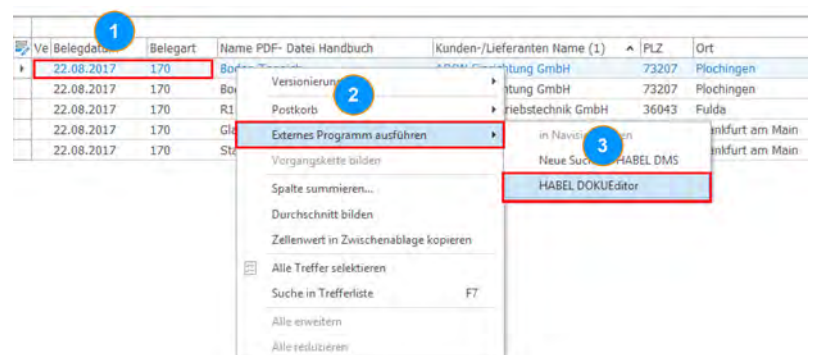
Fig. 28: Program startup

6.3 Program mask and toolbars

In the toolbar (1) at the top, there are various editing functions which are explained in more detail below.
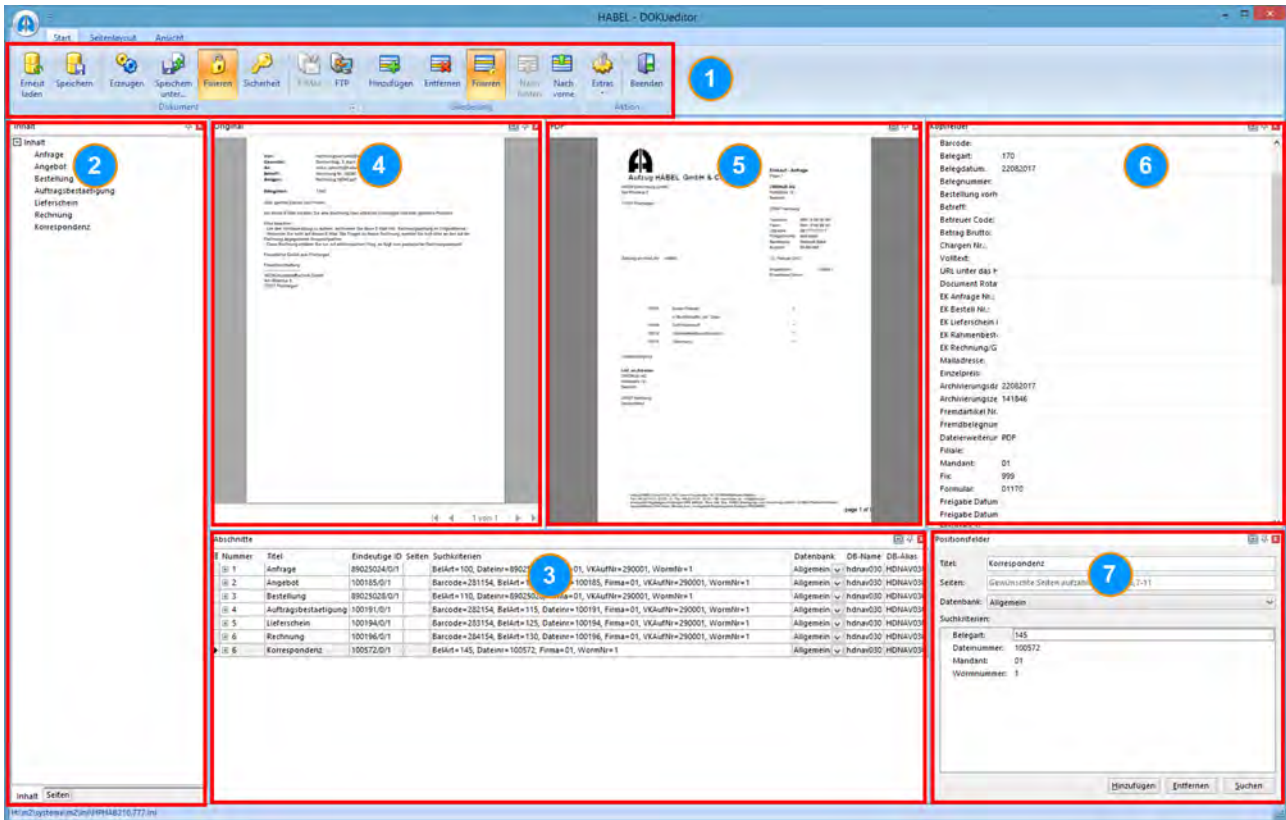

Fig. 29: Program mask and toolbars

1	Toolbar	5	PDF
2	Contents	6	Header fields
3	Sections	7	Item fields
4	Original		

Toolbar	In the toolbar at the top, there are various editing functions which are explained in more detail below.
Contents	Automatically compiled from the items in the index file and described on the basis of the definition.
Sections	Display area for the individual elements of the documentation. Amendments can be made here and documents added or deleted.
Original	Preview of the document currently selected under (2).
PDF	Complete preview of the whole documentation in PDF format.

PDF	View of the archiving criteria related to the document. You can also define here whether a digital table of contents and page numbering is to be output as well.
Item fields	View of the archiving criteria at item level. Possible to specify the pages of the individual documents displayed in the documentation.

Toolbar — Start tab

"Reload"	Reloads the data for compiling the documentation from the database. All changes made are lost.
"Save"	Saves the changes in the database.
"Generate"	Generates the documentation internally. It is not yet saved in the file system.
"Save as ..."	Generates the documentation and allows it to be saved in any chosen location.
"Fix"	Permanently accepts all documents.
"Security"	Entry of passwords and document restrictions.
"E-mail"	No function currently.
"FTP"	Generates the document and publishes it on an FTP server.
"Add"	Adds a section to the compiled document.
"Remove"	Removes a selected section from the compiled document.
"Fix"	Accepts the selected documents permanently in the current section.
"Backwards & Forwards"	Moves the current section and/or the selected partial document backwards or forwards.
"Extras"	Allows changes to the basic settings and/or information about the applications.
"Close"	Closes the program.

Start — Settings	To open the settings, select *"Extras ➔ Settings"* . As well as the *"General"* setting for the unit of measurement, you can also specify here where on the document the page numbers are to be positioned. You can set measurement from the left, the right, the top or the bottom. The text to be used is specified in the *"Page number"* area at the top. Next to the two variables *"%page%"* (current page) and *"%totalpages%"* (total number of pages), you can enter any text. If the settings are changed, the document must be generated again (cf. section Generate the documentation) to view these changed settings on the complete document.

Fig. 30: Start — "Settings"

Toolbar — *"Page layout"* tab	The functions in the *"Page layout"* tab are the same as in the Settings window.

Toolbar — *"View"* tab

"One page"	The PDF preview display is changed to a one-page format.
"Fit width"	The width of the PDF preview display is adjusted.
"Fit height"	The height of the PDF preview display is adjusted.
"Zoom out"	The PDF preview display is reduced in size.
"Zoom in"	The PDF preview display is reduced in size.
Window	Various program windows can be activated or deactivated.

The application lets you add further documents to the document that you are creating based on the index data or delete content from it. The documentation can be subdivided into individual chapters. In the management interface, the names of the individual chapters are entered, and the order is defined and saved by the user. This data can be reused for subsequent reproduction.

The documentation is output in **PDF format**. Only documents that are archived in a file format which can be directly displayed in HABEL, such as TIFF, PDF, JPG, COLD, etc., can be used as the basis for automatic generation.

6.4 Add documents or individual pages

Adding pages is only required if further documents are to be added that were not transferred from the upstream application. Final notes or a cover sheet might need to be added manually. The document to be added must be archived in HABEL. You also need to know the search criteria so that you can retrieve the document that you want to add in HABEL.

To add a document to the documentation manually, proceed as follows. In our example, we want to add a cover sheet to our documentation.

Dark gray	No hits found for the selected search criteria.
Italic	Documents were not retrieved/searched from the database yet. After the creation, the font changes back to normal.
Orange	Several hits found for the selected search criteria. If possible, the individual hits must be checked.
Red	Errors were found among the hits. E.g. document not accessible, etc.

Fig. 31: "Sections" area

1. As the first step, all documents from the index file are listed in the *"Sections"* area. Click on the row before (or after) which the new document is to be added. The selected row will be highlighted in blue.

2. In the toolbar at the top (*"Start"* tab), select the command *"Add"*.

Fig. 32: "Sections" window

⇨ A copy of the previously marked entry is created in the *"Sections"* window.

Fig. 33: "Title" field

3. Click on the *"Title"* field, and change this to the text that you want.

Fig. 34: "Sections" window

4. ▶ To select the additional document from the database, you need to remove the corresponding search criteria (in this case: Unique ID) in the *"Sections"* The entry is then highlighted in light gray, because no document can be found under the search criteria.

Fig. 35: "Item fields" window

5. ▶ To then add the required document, the matching search criteria need to be added in the *"Item fields"* window. When you click the *[Add]* button (1), a separate window opens (cf. point 7 ff. below) in which you can select a database field and enter a search criterion. If you enter an incorrect criterion, you can delete it with the Remove button (2). The criteria already entered are listed in the *"Search criteria"* (3) area.

6. ▶ When you click the *[Add]* button (as described under point 5), the following window opens:

Fig. 36: "Add search criteria" window
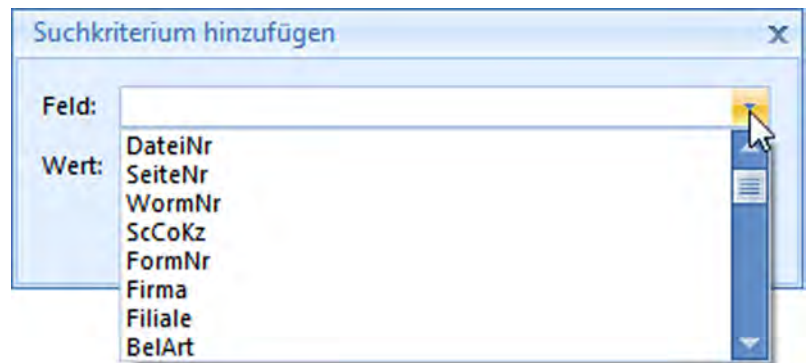
Fig. 37: "Field" area

7. ▸ You can now select the field name in which the application is to search for the document using the selection menu (1) in the *"Field"* area.
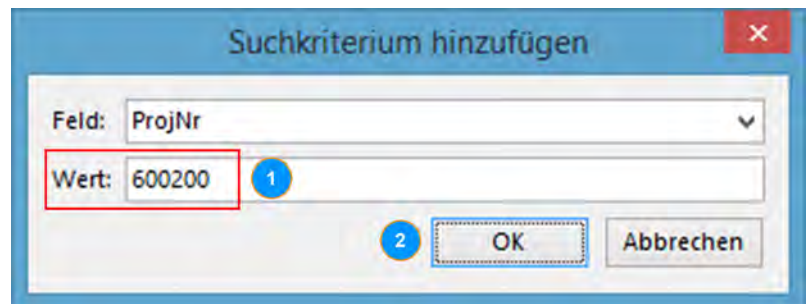
Fig. 38: "Value" area

8. ▸ After entering a search criterion in the *"Value"* (1) area, the search in the archive is started when you click *[OK]* (2):

9. ▸ It is advisable to refine the search as much as possible by entering multiple search criteria so that you do not have too many documents to choose from. To do this, you may need to repeat steps 6 to 8 several times.

6.5 Specify the documents to be used

Regardless of whether a document was added manually or whether the selection of documents to be used was specified in the original index file, the search of the archive with these criteria may nonetheless return not one but several documents, which makes selection unclear.

Fig. 39: "Sections" area

1. ▸ If the current search criteria return several possible documents, this row is highlighted in yellow in the *"Sections"* area. The search criteria entered or contained in the index file are shown in the "Search criteria" column.

Fig. 40: "Original" window

2. ▸ To select the required document manually, you need to select the *"+"* sign in front of the relevant row to fully expand the procedure. An area opens listing all the documents which match the search criteria entered. One row is shown for each document. A preview of the individual document can be seen in the *"Original"* window (cf. point 3). Select the document by checking *"Use?"*. This box must be checked for the documents which are to be inserted into the complete documentation that is being created. For all other documents, it must be unchecked.

⇨ The document that you clicked on under point 0 is displayed as a preview in the *"Original"* window:

3. ▸ Single or multiple pages from a document can also be used. To do this, specify the pages to be used in the Pages input area in the "Item fields" window or the "Sections" window.

Fig. 42: "Pages" input area

⇨ In this area, single pages can be listed (e.g. 1,3,7 for the first, third and seventh page), the range defined (e.g. 7–11) and the combination of the two used. The separator is a comma.

Fig. 41: "Original" window

6.6 Fix

Fix an individual document

You can fix your selection so that you do not have to select an individual document again when you open the documentation later in the *"DOCUEDITOR"*. To do this, click the *"Fix"* button in the *"Structuring"* area of the *[Start]* tab in the toolbar at the top.

"Fix" means that the selected documents can no longer be gathered with the search criteria but with their **unique ID** (Computer/ File/Page/Worm number). When using the search criteria, the document selection may not necessarily be clear. With the *"Fix"* function, these criteria are replaced and the document selection is always clear. The row then no longer appears in yellow or red in the *"Sections"* area, but in blue.

| Abschnitte				
Nummer	Titel	Eindeutige ID	Seiten	Suchkriterien
⊞ 1	Deckblatt	89025426/0/1		BelArt=440, ProjNr=600200
⊞ 2	Anfrage	89025024/0/1		BelArt=100, Dateinr=89025024, Firma=(
⊞ 3	Angebot	100185/0/1		Barcode=281154, BelArt=105, Dateinr=

Fig. 43: Fix an individual document

Fixing is always sensible if the documents to be used to create the complete document do not often change. For example, this method could be used to add the **T&Cs** without having to make a new selection every time. If the T&Cs change, the field "unique ID" would have to be manually cleared and a new search performed with the criteria.

For a document that is frequently changed to create the complete document, the "Fix" function should not be used. In this case, you should check which of the archived documents is now the correct one. For example, the *"current Y/N"* field could be used for a search criterion, because you need to ensure that the current document is always used. In this case, fixing would mean that the same document is always used instead of the current document. Without fixing, a new search would be performed each time with the indicator *"current = Y"* and would always return the current document.

Fix all documents in the complete document

Fixing an individual document as described above can also be used for all selected documents. This means that each individual document will be gathered with the unique internal ID (Computer/ File/Page/Worm number), and the search criteria will no longer be used in future for any document. To do this, click the *[Fix]* button in the *"Document"* area of the *"Start"* tab.

6.7 Move documents within the complete document
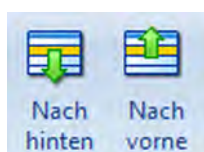
A document can be moved to the required position within the complete document by selecting the *"Backwards"* / *"Forwards"* functions in the *"Start"* toolbar.

6.8 Save

Fig. 44: "Start ➜ Save"

The source for generating the complete documentation was an index file. The index data of this original index file is changed and supplemented by making manual changes such as adding pages, selecting the documents to be used or changing the order. These changes can be saved back into the archive at the end. This means that the original index data is changed in the archive. The manual changes are therefore retained and can be used again later. Saving does not mean, therefore, that the complete document is saved as a PDF file but that the index data for creating the complete document is saved.

6.9 Generate the documentation

To create the complete documentation with changed settings, complete documentation must be created once by selecting the *"Generate"* function. The preview appears in the *"PDF"* window. A PDF document can now be created, which can be saved or sent.
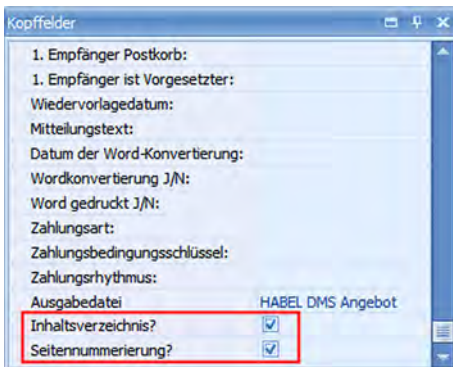
6.10 Table of contents and page numbering

Fig. 45: Table of contents and page numbering

A table of contents and consecutive numbering can be generated automatically including all the individual documents in the complete documentation. This is configured in the *"Header fields"* window.
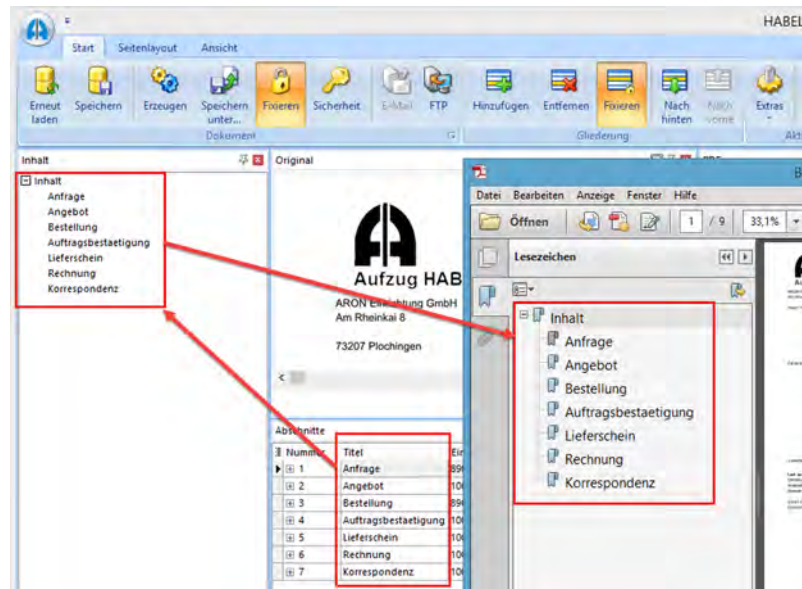

Fig. 46: PDF file of the entire document

The table of contents is compiled from the titles of the sections. If the same titles occur consecutively, they are combined. They are shown combined in the *"Content"* window.

6.11 Document security

Typical PDF security settings can be configured for the complete document in PDF format. To access these settings, use the *[Security]* button in the *"Start"* toolbar.

As well as the owner password and user password, you can specify whether, for example, printing or copying of content is permitted. The document can also be generated with encryption.
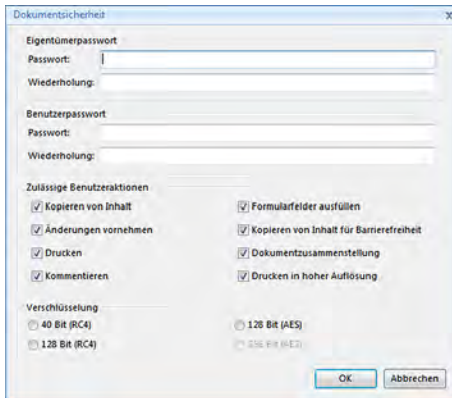
Fig. 47: Document security

HABEL
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