

## ALLES GEHABELT. ALLES GEREGELT.

# Retrieval

Software manual



Release 2018



## Table of contents

| 1 | Introduction   | 5        |
|---|--|----------|
|   | 1.1 Preface  | 5        |
|   | 1.2 Overview   | 5        |
|   | 1.3 Symbolism in this manual                               | 5        |
|   | 1.4 Information regarding this manual                      | 5        |
| 2 | Elements of the interface                                  | 6        |
|   | 2.1 Command bar  | 8        |
|   | 2.2 HABEL QUICKSTART (use of hotkeys)                      | . 8      |
| 3 | The search   | 11       |
|   | 3.1 Search — Command bar                                   | 11       |
|   | 3.2 Command bar — Search favorites                         | 18       |
|   | 3.2.1 General  | 18       |
|   | 3.2.2 Versioning   | 21       |
|   | 3.2.3 More   | 21       |
|   | 3.3 Search screen  | 42       |
|   | 3.3.1 Search parameter                                     | 43       |
|   | 3.3.2 Search screen  | 44       |
|   | 3.4 Search favorites                                       | 50       |
|   | 3.5 Search history   | 54       |
|   | 3.6 HABEL SYNONYM  | 54       |
|   | 3.7 HABEL CONNECTION and HABEL CONNECTION                  | 56       |
|   |  | 56       |
| 4 | The hitlist  | 57       |
|   | 4.1 Command bar — Hitlist                                  | 57       |
|   | 4.1.1 Hitlist  | 58       |
|   | 4.1.2 Document   | 59       |
|   | 5  | 60       |
|   | 5 5 1  | 61       |
|   |  | 61       |
|   | 4.2.3 Group  | 62       |
|   | 4.2.4 Fit width  | 63       |
|   | 4.2.5 Adjust columns                                       | 63<br>66 |
|   | 4.2.6 Sort   | 66       |
|   | 4.2.7 Save hitlist settings                                | 66<br>67 |
|   | <ul><li>4.3 Hitlist</li><li>4.3.1 Process chains</li></ul> | 72       |
|   | 4.4 Logs and history                                       | 74       |
| E |  | 75       |
| 5 |  | 78       |
|   |  |          |
|   | 3 3  | 81<br>01 |
| _ | 5.3 HABEL ACCOUNT ASSIGNMENT STAMP                         | 81       |
| 6 | Document information                                       | 83       |



| 7 | Versioning                           | 84 |
|---|--------------------------------------|----|
|   | 7.1 Versioning of documents          | 84 |
|   | 7.1.1 Step 1: Archive                | 84 |
|   | 7.1.2 Step 2: Check out              | 84 |
|   | 7.1.3 Step 3: Check in               | 85 |
|   | 7.2 Automatic versioning             | 87 |
| 8 | Function keys and key combinations   | 88 |
| 9 | HABEL mobile                         | 89 |
|   | 9.1 General                          | 89 |
|   | 9.1.1 Program startup                | 89 |
|   | 9.1.2 Overview of functions          | 89 |
|   | 9.2 Hitlist                          | 91 |
|   | 9.3 Document display and information | 92 |
|   |                                      |    |



## 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 retrieval. It explains the specific functions and settings.

## 1.3 Symbolism in this manual

**General symbols** 

Cros

|              | This list marks the description of actions for you to perform.  |
|--------------|---|
|              | <ul> <li>This item marks bulleted lists.</li> <li>This line marks lists on the second level.</li> </ul> |
| s 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 **hand-buch@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.

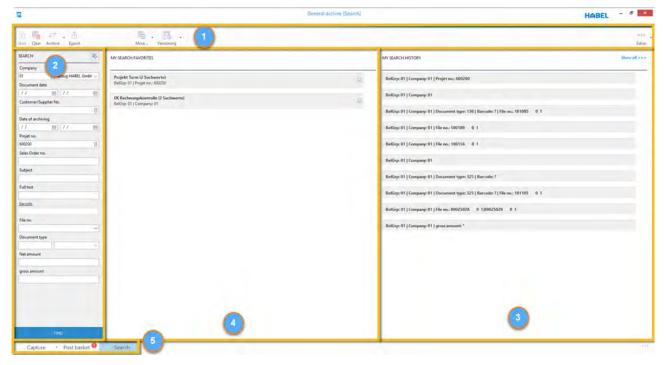


## 2 Elements of the interface



Start the retrieval by double-clicking on the retrieval symbol, which appears as a link on your desktop.

If the symbol is not on your desktop, please speak to your administrator. When you start the application, the retrieval mask opens. This is structured as follows:



### Fig. 1: Retrieval mask

- 1 Command bar
- 2 Search mask
- 3 Search history
- 4 Search favorites
- 5 Navigation bar



## Command bar without completed search

| 2  |   | General archive (Search) |   | HABEL - *       |
|--|---|--------------------------|---|-----------------|
| 1) - (1)<br>Hits Cher Aichive Espon            | More Versioning   |                          |   |                 |
| SEARCH   | MY SEARCH FAVORITES   |                          | MY SEARCH HISTORY   | Shany all sizes |
| Company<br>01 Aufzug HABEL GmbH ~              | Projekt Turm (2 Suchwerte)<br>BelGrp: 01   Projet no: 00020     | 9                        | BelGrp: 01   Company: 01   Projet no.: 600200                                     |                 |
| Document date //  El //  Customer/Supplier No. | EK Rechnungskontrolle (2 Suchwerte)<br>BelGrp: 01   Company: 01 | 9.                       | BelGrpt: 01   Company: 01   |                 |
| Date of archiving                              | server, or incompany, or  |                          | BelGrp: 01   Company: 01   Document type: 130   Barcode: ?   File no.: 101085 0.1 |                 |
| // E   |   |                          | BelGrp: 01   Company: 01   He no.: 100189 0 1                                     |                 |
| 600200 III                                     |   |                          | BetGrp: 01   Company: 01   File no.: 100156 0.1                                   |                 |
|  |   |                          | BelGrp: 01   Company: 01  |                 |
| Subject  |   |                          | BelGrp: 01   Company: 01   Document type: 325   Barcode: ?                        |                 |
| Full test                                      |   |                          | BelGrpc 01   Company: 01   Document type: 325   Barcode: 7   File no.: 101105 0.1 |                 |
| Saroch.  |   |                          | BellSrp: 01   Company: 01   File no.: 89025028 0 1:89025029 0 1                   |                 |
| File no.                                       |   |                          | BelGrp: 01   Company: 01   gross amount: *  |                 |
| Document type                                  |   |                          |   |                 |
|  |   |                          |   |                 |
| gross amount                                   |   |                          |   |                 |
|  |   |                          |   |                 |
|  |   |                          |   |                 |
| FIND-  |   |                          |   |                 |
| Capture • Post basket                          | Search  |                          |   |                 |

Fig. 2: Retrieval without completed search



## Command bar with completed search

| 1                                 |             |                     |                               |                 |            | General archi | ve (Hitlist - | Standardtr    | effeniste Recherche - ]                                  |         |                      |             | HABEL  |       |
|-----------------------------------|-------------|---------------------|-------------------------------|-----------------|------------|---------------|---------------|---------------|--|---------|----------------------|-------------|--|-------|
| itart Clear Archive Export        |             | Hitlist Docum       |                               |                 |            |               |               |               | teas   | . Indec | C<br>Separate window | Comment Not |  | Estra |
| SEARCH                            | 108 hts     | Company 01 Autz     | ug HABEL GmbH & Co. KG        | Projet no. 600  | 005        |               |               |               |  | Docume  | nt Annotations       | _           | A  |       |
| Company<br>01 Autzug HABEL GmbF ~ | Document ty | ype A               |                               |                 |            |               |               |               | 1  | •       | A                    |             | 10.0   |       |
| Document date                     | -           |                     |                               |                 |            |               | - Income      | Ter con de la |  |         | 10.0                 | 2.00 m      |  |       |
| 77 B 77 B                         | Versionier  |                     | ati Document-type déscription | o Sales Order n | o. Postcox | Sellocation   | Projet n      | o. Project Na | Article description Subject:                             |         | -                    | 正整          | and the second second  | 5. 25 |
| en en en                          | + Docum     |                     | R Inquiry (Anzahl=07)         |                 |            |               |               |               |  |         | March                | 2.          | and relations  |       |
| Customer/Supplier No.             |             | 1/19/2018           | PUR Inquiry                   | 290001          | 20095      | Hamburg       | 600200        |               | Stahltur, Modell H 8-5 zu Projekt Turm AG No 600200      |         | 1. 10° 800-          |             | t  |       |
| 8                                 |             | 2/12/2012           | PUR Inquiry                   | 290001          | 20095      | Hamburg       | 600200        | Turm AG       | Stahlbür, Modell H 8-5 zu Projekt Turm AG No 600200      |         | -                    |             |  |       |
| Date of archiving                 | •           | 2/12/2012           | PUR Inquiry                   | 290001          | 20095      | Hamburg       | 609200        |               | Glastursystem, Modell E23-1 zu Projekt Turm AG No 600200 |         | 800-                 |             | the second secon |       |
| // 8 // 8                         |             | 2/12/2012           | PUR Inquiry                   | 290001          | 36043      | Fulda         | 600200        | Turm AG       | R1 kompakt, Stahlfahrkorb                                |         |                      |             |  |       |
| Projet no.                        |             | 2/12/2012           | PUR Inquiry                   | 290001          | 36043      | Fulda         | 609200        | Turm AG       | R8 eddusiv, Stahlfahritorb                               |         |                      |             |  |       |
|                                   | H           | 2/12/2012           | PUR Inquiry                   | 290001          | 73207      | Plochingen    | 600200        | Turm AG       | Boden Parkett  |         |                      |             |  |       |
| 600200 []                         | -           | 2/12/2012           | PUR Inquiry                   | 290001          | 73207      | Plochingen    | 600200        | Turm AG       | Boden Teppich  |         | OBDURCH IN RD        |             |  |       |
| Sales Order no.                   | + Docum     |                     | t Offer (Anzahl=07)           |                 |            |               |               |               |  |         |                      |             | ARCONTRACTOR S   |       |
|                                   |             | 2/13/2012           | PUR Offer                     | 290001          | 73207      | Plochingen    | 600200        |               | Dämmung  |         | Page 1               |             | 10000  |       |
| Subject                           |             | 2/15/2012           | PUR Offer                     | 290001          | 36043      | Fulda         | 600200        | Turm AG       | 3 = 2 ANC Motor  |         |                      | _           |  |       |
| subject                           |             | 2/13/2012           | PUR Offer                     | 290001          | 73207      | Plochingen    | 600200        |               | Dammung  |         |                      |             |  |       |
|                                   |             | 2/12/2012           | PUR Offer                     | 290001          | 20095      | Hamburg       | 600200        | Turm AG       | Stahltür, Modell H 8-5 zu Projekt Turm AG No 600200      |         |                      |             |  |       |
| Full text                         | 1.1         | 2/12/2012           | PUR Offer                     | 290001          | 20095      | Hamburg       | 600200        | Turm AG       | Glastürsystem, Modell E23-1 zu Projekt Turm AG No 600200 |         |                      |             |  |       |
|                                   | 1           | 2/15/2012           | PUR Offer                     | 290001          | 36043      | Fulda         | 600200        | Turm AG       | R8 exklusiv, Stahlfahrkorb                               |         |                      |             |  |       |
| Barcode                           |             | 2/14/2012           | PUR Offer                     | 290001          | 73207      | Plochingen    | 600200        | Turm AG       | Boden Teppich korrigiertes Angebot zu AG-Nr. 7           |         |                      |             |  |       |
| MENOL.                            | - Docum     | nerit type : 110 PU | R Order (Anzahl=06)           |                 |            |               |               |               |  |         |                      |             |  |       |
|                                   |             | 2/12/2012           | PUR Order                     | 290001          | 20095      | Hamburg       | 600200        | Turm AG       | Stahltur, Modell H 8-5 zu Projekt Turm AG No 600200      |         |                      |             |  |       |
| File no.                          |             | 2/12/2012           | PUR Order                     | 290001          | 20095      | Hamburg       | 600200        | Turm AG       | Glastürsystem, Modell E23-L zu Projekt Turm AG No 600200 |         |                      |             |  |       |
|                                   |             | 2/15/2012           | PUR Order                     | 290001          | 36043      | Fulda         | 600200        | Turm AG       | R1 kompakt, Stahlfahrkorb                                |         |                      |             |  |       |
| Document type                     |             | 2/15/2012           | PUR Order                     | 290001          | 36043      | Fulda         | 600200        | Turm AG       | R8 exdusiv, Stahlfahrkorb                                |         |                      |             |  |       |
|                                   |             | 2/15/2012           | PUR. Order                    | 290001          | 73207      | Plochingen    | 600200        | Turm AG       | Boden Parkett  |         |                      |             |  |       |
|                                   |             | 2/15/2012           | PUR Order                     | 290001          | 73207      | Plochingen    | 600200        | Turm AG       | Boden Teppich  |         |                      |             |  |       |
| Net amount                        | # Docum     | nent type : 115 PU  | R Order confirmation (Anzal   | vi=05)          |            |               |               |               |  |         |                      |             |  |       |
|                                   |             | 2/15/2012           | PUR Order confirmation        | 290001          | 20095      | Hamburg       | 600200        | Turm AG       | Stahltür, Modell H 8-5 zu Projekt Turm AG No. 600200     |         |                      |             |  |       |
| gross amount                      |             | 2/15/2012           | PUR Order confirmation        | 290001          | 20095      | Hamburg       | 600200        | Turm AG       | Glastursystem, Modell E23-Lzu Projekt Turm AG No 600200  |         |                      |             |  |       |
|                                   |             | 2/18/2012           | PUR Order confirmation        | 290001          | 36043      | Fulda         | 600200        | Turm AG       | R& exddusiv, Stahlfahrkorb                               |         |                      |             |  |       |
|                                   |             | 2/18/2012           | PUR Order confirmation        | 290001          | 36043      | Fulda         | 600200        | Turm AG       | R1 kompakt, Stahifahrkorb                                |         |                      |             |  |       |
|                                   |             | 2/15/2012           | PUR Order confirmation        | 290001          | 73207      | Plochingen    | 600200        | Turm AG       | Boden Parkett  |         |                      |             |  |       |
|                                   | 1.1.1       | 2/15/2012           | PUR Order confirmation        | 290001          | 73207      | Plochingen    | 600200        | Turm AG       | Boden Teppich  |         |                      |             |  |       |
|                                   | A Docum     | nent type : 125 PU  | R Delivery note (Anzahl=07)   |                 |            |               |               |               |  |         |                      |             |  |       |
|                                   | - 11        | 3/5/2012            | PUR Delivery note             | 290001          | 20095      | Hamburg       | 600200        | Turm AG       | Stahltür, Modell H 8-5 zu Projekt Turm AG No 600200      |         |                      |             |  |       |
|                                   |             | 3/13/2012           | PUR Delivery note             | 290001          | 20095      | Hamburg       | 600200        | Turm AG       | Glastürsystem, Modell E23-Lzu Projekt Turm AG No 600200  |         |                      |             |  |       |
|                                   |             | 3/7/2012            | PUR Delivery note             | 290001          | 20095      | Hamburg       | 600200        | Turm AG       | Stahltur, Modell H 8-5 zu Projekt Turm AG No 600200      |         |                      |             | H 4 Tel1   | 8.8   |
|                                   |             | 3/9/2012            | PUR Delivery note             | 290001          | 36043      | Fulda         | 600200        |               | R1 kompakt Stablfahrkorh                                 |         |                      |             |  |       |
|                                   | 1 - 1 - 1   | 20100012            | non national ante             | 365301          | oritin.    | P-14+         | 100500        |               | No. inddenie - Cashilanda de                             | • Write | e notice             |             |  |       |

Fig. 3: Retrieval with completed search

## 2.1 Command bar



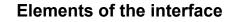
The functions in the command bar listed here refer to the command bar when no hitlist is shown yet.

After a search has been performed and the hitlist is shown, the command bar changes. Since it is then the command bar for the hitlist, you will find these descriptions in the description of the hitlist & Chapter 4.1 "Command bar — Hitlist" on page 57.

## 2.2 HABEL QUICKSTART (use of hotkeys)

You can use **hotkeys** (key combinations) in retrieval to start a search in other applications using highlighted sections of text. The HABEL QUICKSTART is integrated in the Windows taskbar and allows you to use the hotkey function.

Quickstart must be activated to use the hotkey search. To open the menu, right-click on the symbol.







The "Options" command opens the Settings menu for the hotkey search.

Within the settings, you can specify individual and global definitions. This depends on your assigned rights.

Use the [Add] button to create new key combinations, [Edit] to edit existing ones and [Delete] to delete existing ones.

| HABEL Quickstart          |                 |        |
|---------------------------|-----------------|--------|
| Administrator             |                 |        |
| globale Voreinstellungen  | bearbeiten      | -      |
| Users may create pers     | ional settings  |        |
| Hotkey - Searchfield Mapp | pings           |        |
| Tastenkombination         | Feldbezeichnung |        |
|                           |                 | Add    |
|                           |                 | Edit   |
|                           |                 | Selete |

To define hotkeys, first select the "Document group" (e.g. General archive, Human Resources etc.) (1). Select the "Field description" (2) to define in which field the highlighted value for the search will be applied. The associated (internal) "DB field" will be automatically filled after selecting the field description. The "key combination" (3) is defined by pressing the desired combination.

You have further options for defining the search that is to be started by this key combination (4):

| Receipt-group  | - 12     |   |
|--|----------|---|
| 01 - General (HDNAV03  | 0) 🚺     | ~ |
| Field-description  | DB-Field |   |
| Sales Order no. 2  | vkaufnr  | ~ |
| Hotkey   |          |   |
| Ctrl + Shift + A   | 3        |   |
| Search with Receipt-<br>Stop in hit-list<br>Use wildcard-search<br>Restart Retrieval for<br>Active | (4       | • |

Search with document group

Stop in hitlist

If this function is not checked, the search will be run within the document group which was preset in retrieval. The document group (1) is disregarded.

If this function is activated, the hitlist will be shown instead of the first hit when the search is started.



With wildcard search

The wildcard search lets you search for partial field content. For example, if you do not know the whole external document number 123456, you can search for 3456. To obtain the correct result, you need to put an asterisk \* in front of the number (\*3456). All the entries ending on 3456 in the external document number field will then be found. Whatever is in front of this is irrelevant. If this function is checked, an asterisk \* is placed before or after the value, as required.

Restart retrieval for every search

If this function is checked, retrieval is restarted for every search.

### Example:

In our example, we have already configured some hotkey settings.

If you select a value (e.g. a number) in an external application and press [Ctrl] + [Alt] + [R], the field "Account no." will be filled with this value in the background in the retrieval and the search is started.

|  | t - Properties |   |
|--|----------------|---|
| Receipt-group  |                |   |
| 01 - Allgemein (HDNAV030)  | )              | v |
| Field-description  | DB-Field       |   |
| VK Auftrag Nr.   | ✓ vkaufNr      | v |
| Hotkey   |                |   |
| STRG + UMSCHALT + A  |                |   |
| Search with Receipt-gro Stop in hit-list Use wildcard-search Restart Retrieval for ew Active |                |   |
| Save   | Abort          |   |

Some hotkeys are pre-allocated by default in Windows such as [Ctrl] + [C] for copy.



#### 3 The search

## 3.1 Search — Command bar

START



Use the [START] button to get to the start screen "Retrieval mask" Fig. 1.

Use the [Clear] button to clear the contents of the search mask so

Clear

Clear



that previous searches are no longer available. You can also configure a setting to make the history available beyond the end of the retrieval. You

can configure this by selecting "Settings → General" 🖑 ""Settings → General" on page 22. If the function "Save history upon closing" is not activated, the history is deleted when you exit the retrieval. You can save up to 10 searches. Once this maximum is reached, the "oldest" search is deleted.



## [Archive] button

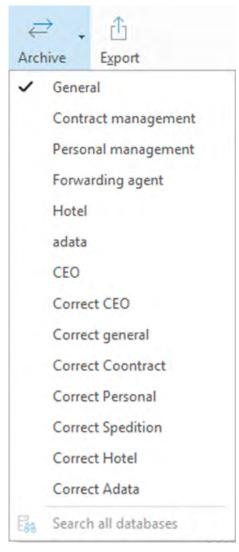


Fig. 4: Archive button

From the list, select an archive in which the retrieval will be performed.



## Selection of multiple databases — General search

| Datenbankauswahi             |     | - 1 | ×      |
|------------------------------|-----|-----|--------|
| Algerren<br>Frienbuchheitung |     |     |        |
|                              |     |     | 1      |
|                              |     |     | 10     |
|                              |     |     | 1.0    |
|                              |     |     |        |
|                              |     |     | 1.1    |
|                              | -DX | Abb | aechen |

Fig. 5: General search

If you are using multiple databases e.g. because you are dealing with different areas (General Archive, Human Resources, Financial Accounting) or different time periods (2015, 2016, 2017), you can select the database (archive) in which you want to search *"[Archive] button" on page 12*.

The setting is saved for each database. For example, when you call up the General Archive database, you can specify that you want to search in the General Archive and Human Resources database. In the Human Resources database, you can specify that you want to search in Human Resources and Forwarding agent etc.

The listed order also determines how the results will be displayed. For example, if you search in the General Archive and Human Resources database, you will be shown the results from General Archive first, then from Human Resources. If you move the Human Resources database to the top using the arrow key, the results from the Human Resources database will be shown first.

If you select further databases, the cross-database search is active, which you can see from the symbol by the button.

To deactivate this, click on *"General search"* Fig. 4 and uncheck the relevant database.



### Extended search

Subject

Full text

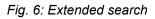
Barcode

File no.

The **Extended search** allows advanced searches. The **Extended search** is the equivalent of a filter. That is, it first searches using the additionally entered terms, and then filters the results based on the extended-search terms. However, if no additional term has been entered in other database fields, the complete database is searched, which can lead to a longer search time.

Fields for which an extended search has been activated are marked with a symbol indicating this at the end of the row.

Clicking on this symbol takes you to the extended search. Here you can search in a variety of ways.



644

| From-to      | Enter the lowest value, then two dots (indicates the term "to"),<br>then enter the highest value. You can also enter further areas<br>separated by a semicolon.  |
|--------------|--|
| For example: | <ul> <li>Document type: 0105 = Show all document types from 01 to 05</li> <li>Document type: 0105;0812 = Show all document types from 01 to 05 and from 08 to 12</li> <li>Cost center: 50005500 = Show all cost centers from 5000 to 5500</li> <li>Amount: 100;101398;75 = Show all amounts with 100, from 10 to 1398 or 75</li> </ul> |
| or           | Enter multiple terms separated by a semicolon.<br>For example: Document type: 01;04;05 = Show all document<br>types with 01, 04 or 05  |
|              | <ul> <li>The different input options are explained in more detail in the description which you can access via the area marked in red. Please follow these instructions!</li> </ul>   |



| earch:  |  |        |
|---|--|--------|
| All search criteria must be found (AND) Search for fragments  |  |        |
| is essential that you read the instructions on this search method.  | DK.  | Cancel |
| oout  | ×  |        |
| Note:   | ~  | 1      |
| lote:<br>'ou are starting an extended search. This search will take longer than usu<br>nnecessary search time, observe the following instructions.<br>In extended search allows you to search using several criteria in a search<br>tandard search, only one value is entered into a search field.<br>For example: customer 1D number = 15027.<br>'ou can now fill a field with multiple values, if you use the extended search<br>For example: 15027.18336;58341.<br>In extended search function acts as a filter; that is, it first searches using t<br>netered criteria, and then filters the results. If no additional search criteria is<br>nother search. Field, the complete database is searched. This can take a | field. In a<br>1.<br>he additionally<br>entered in |        |

Fig. 7: Extended search instructions

Export



HABEL offers various export functions. You can provide data from the archive for other applications, or call up information for the retrieval without needing to access the archive.

## Standard ASCII format fixed sentence length



Export Comats Standard ASCII format with fixed record length ASCII format with header line and TAB separation (e.g., Excel) OB/C database format for local installation Path: File: HPHAE200EXP Overwrite if exists? Starl regnoit program DK Sgection Dancef

**1.** Click on the export symbol.

- A selection box opens. The selection box shown contains all the possible export functions and may differ from your system if you are not using all the export modules.
- **2.** Select the export format *"Standard ASCII format fixed sentence length"*.
- **3.** Select the path and file name and confirm the export with the *[OK]* button.

Fig. 8: Export



ASCII format with header and tab The "HABEL EXPORT Retrieval" module lets you transfer separation (e.g. Excel) selected index data from the HABEL archive in "standard ASCII format". This can be used for evaluations, for example. whole database is transferred for export! **1.** Click on the export symbol. fh Excel)". Export obtain only the data that you want to export. 4. Export -96 Export formats Standard ASCII format with fixed record length with [OK] to start the export. ASCII format with header line and TAB separation (e.g., Excel) OB/C database format for local installation If you activate the "Overwrite if exists?" checkbox, you will allow files that have C1 Path already been exported to be overwritten. File: HPHAB200.EXP Overwrite if exists? Starl equal program <u>OK</u> Sglection Cancel

### Fig. 9: Export

| Export                              |  |
|-------------------------------------|--|
| File: H:\M2\systeme\m2\HPHAB200.EXP |  |
| Written: 547                        |  |
| 🖌 ОК                                |  |

Fig. 10: Successful export

- If you do not enter any data, the content of the
- **2.** Select "ASCII format with header and tab separation (e.g.
- 3. First, enter the required search terms in the retrieval mask to
- Start the export program with the [Export] button. Select another path if necessary with the [Selection] button. Confirm

The search terms are exported, including the item data, ⇒ and made available in a file for further use.

If the data is exported to an Excel table, for example, the result might look like this.



| X    | 85-          | C          | ÷       |             |      |         | HPHA    | B200.EXP  | - Excel           |          |           |        | ? !            | - (Ŧ  |       | ×     |
|------|--------------|------------|---------|-------------|------|---------|---------|-----------|-------------------|----------|-----------|--------|----------------|-------|-------|-------|
| D/   | ATEI STAR    | T          | EINFÜG  | 5EN         | SEIT | ENLAYOU | T FOR   | MELN      | DATEN             | ÜBB      | RPRÜFEN   | ANSI   | CHT            |       | Anm   | elder |
|      | ъж.<br>В т.  | Calib<br>F |         | - 11<br>- A | _    |         | - E -   | %<br>Zail | Beding<br>Als Tat |          |           | Zellen | A.<br>Bearbeit | 8     |       |       |
| Ein  | fügen        | E.         | - 3     | - A         |      | 经程      | 87-     | T         | Zellenf           | ormatv   | orlagen = | -      | T Pearben      | en    | 1     |       |
| Zwis | chenablage G |            | Schrift | art         | ń,   | Ausrich | tung ra |           | For               | matvoria | igen      |        |                | HAB   | EL TA | ~     |
| AI   |              | 1          | ×       | 4           | fx   | DateiN  | lr.     |           |                   |          |           |        |                |       |       | v     |
| 2    | A            |            | в       |             | с    |         | D       | ÷.        | 12. 11            | E        | G         |        | н              |       | í .   | -     |
| 1    | DateiNr      | Seite      | Nr      | Wo          | mNr  | ScCol   | Cz F    | ormNr     | Firma             |          | Filiale   | Bel    | Art            | UBelA | rt    | 70    |
| 2    | 89000129     |            |         | 0           |      | 1       | 2 h     | TIF       |                   | 1        |           |        | 235            | 5     |       |       |
| 3    | 89000130     |            |         | 0           |      | 1       | 2 h     | TIF       |                   | 1        |           |        | 100            | 0     |       |       |
| 4    | 89000129     |            | 1.19    | 0           |      | 1       | 2 h     | TIF       |                   | 1        |           |        | 23             | 5     |       |       |
| 5    | 89000113     |            |         | 0           |      | 1       | 2 h     | TIF       |                   | 1        |           |        | 205            | 5     |       |       |
| 6    | 89000113     |            |         | 0           |      | 1       | 2 h     | TIF       |                   | 1        |           |        | 203            | 5     |       |       |
| 7    | 30000001     |            |         | 0           |      | 1       | 2       |           |                   | 1        |           |        | 200            | 0     |       |       |
| 8    | 30000001     |            |         | 0           |      | 1       | 2       |           |                   | 1        |           |        | 200            | 0     |       |       |
| 9    | 89025040     |            |         | 0           |      | 1       | 2       | 1         | 215               | 1        |           |        | 215            | 5     |       |       |
| 10   | 89003120     |            |         | 0           |      | 1       | 2 h     | .TIF      |                   | 1        |           |        | 235            | 5     |       |       |
| 11   | 89003122     |            |         | 0           |      | 1       | 2 h     | .TIF      |                   | 1        |           |        | 230            | 0     |       |       |
| 12   | 89000122     |            |         | 0           |      | 1       | 2 h     | TIF       |                   | 1        |           |        | 230            | 0     |       |       |
| 13   | 89003131     |            |         | 0           |      | 1       | 2 h     | TIF       |                   | 1        |           |        | 100            | 0     |       | *     |
|      | + + I        | HPH        | AB200   |             | ۲    |         |         |           | ž                 | 4        | ]         |        |                |       |       | •     |
| BER  | EIT          |            |         | -           |      |         |         |           |                   | m        | <b>1</b>  |        | - 1            |       | 100   | *     |

Fig. 11: Excel export

You can also transfer the index and document data for *"offline retrieval"*. This type of export could be useful for sales representatives, for example, who want access to the archived procedures on site at customers' premises.

To use the retrieval *"offline"*, i.e. disconnected from the in-house archive, retrieval must be installed on the user's notebook.

## DBC database format for local installation

|                |  | Exp           |
|----------------|--|---------------|
| xport          |  | - 21          |
|                | rmats<br>ard ASCII format with fixed record length<br>format with header line and TAB separation   | (e.g., Excel) |
| OB/C           | database format for local installation   |               |
| - 11 P         | and a set of the set o |               |
| 1.102          | ĊŸ.  |               |
| Path:          |  |               |
| Path:<br>File: | (C)  |               |

- **1.** Click on the export symbol.
- 2. Select "DBC database format for local installation".
- **3.** Prepare the export as described above. Select the export format *"DBC database format for local installation"*.
- **4.** If you activate the "Start export program" checkbox, the local archive will be created immediately after export of the data and documents. If you want to gather various exports first and only transfer all exports to the local archive at the end of the procedure, activate this checkbox only for the last export.
- **5.** Once you have confirmed with *[OK]*, the menu for creating the local archive opens.

fh



| Zeid C WESSE/LOKALDIR\         IP Beger nicht üschen?         Beleger nicht üschen?         Programme/Übr nicht übertagen?         Update Verzeichnis Kopieren         Programm nach Übertägung schließen?         ÜMKDE: Prögramme Kopieren?         Operation :         State: | Quelle: C. WESSEVHABELV              |  |
|--|--------------------------------------|--|
| Belege nicht üschen? Programme/Bit nicht übertragen? Update Verzeichns kopieren Programm nach Überträgung schließen? (MGDL: Programm kopieren?) Operation :  | Ziel C.VMESSE/LOKALDIR/              |  |
| Programme/Dit nicht übertragen? Updele Verzeichnis köpieren Programm nach überträgung schließen? MiGBL: Programme Kopmen?? Operation :   | V Bestehendes Arc iv überschreiberi  |  |
| Update Verzechnis kopieren Program nach Überbagung schließen? UdsDL-Programs kopieren?? Operation :  | Belege nicht öschen?                 |  |
| Programm nach (Bostagung schließen? (2) M/SDL-Programm Kopmen?? Operation:   | Programme/Dills nicht übestragen?    |  |
| (2) MySQL-Programs) Kopinier(?)<br>Operation :   | Update Verzeichnis kopieren          |  |
| Operation -  | Programm nach Ubertragung schließen? |  |
|  | 2 MySQL Programm Kopment?            |  |
| Status :   |                                      |  |
|  | Operation :                          |  |

HABEL EXPORT Disc

- **6.** If the existing archive is to be overwritten, activate the corresponding checkbox. If you activate the *"Do not delete documents"* checkbox, documents that have already been exported will not be overwritten. This speeds up the export. You can also prevent current programs for the local archive from being transferred with retrieval then being used with the existing status. This also saves time.
- **7.** Press [*Start*] to copy the data to be exported from the source and store it in the target location.

With the *"HABEL EXPORT Disc module"*, you can export not only index and document data, but also the retrieval, to a CD. This lets you make data from the archive available to people who do not have HABEL installed. A possible application for this might be to pass on data to a tax adviser, for example.

## 3.2 Command bar — Search favorites

## 3.2.1 General



#### Archive

| Altgeneen<br>Archiv IIa Ubergentinds Suche<br>Sochen Archiv Magemen Vatigemenn   | "Archive"                  | "General search" | "[Archive] button"     on page 12 |
|--|----------------------------|------------------|-----------------------------------|
| Image: Sector of the | neet<br>9<br>Ratifikuung V | "Archive"        | "[Archive] button"     on page 12 |

#### Fig. 12: Archive

#### 3.2.1.1 Search

Search



You can filter search results so that the only hits which appear are those which are marked as unfinished in a post basket. To do this, you need to be using **HABEL POST BASKET**.



| Processing and    |         |         | The second se |
|-------------------|---------|---------|---|
| 11                | 目 //    | <u></u> | Information for the field 'Barcode'   |
| Date of archiving | 1       |         | The field 'Barcode' is a counter field. If you press F9 it will be generate an                                  |
| 11                | 自 //    | (III)   | automaticily created number to this field.  |
| Document no.      |         |         | After the creation of this virtual barcode you need to enter this value in<br>your ERP-System.                  |
| Customer/Suppl    | ier No. | E       | ×   |
| Sales Order no.   |         |         |   |
| Sales Offer no.   | 1       |         |   |
| Projet no.        | /       | B       |   |
| Subject           | /       |         |   |
| Full text         | /       |         |   |
| Barcode.          |         |         |   |
|                   |         |         |   |

Fig. 13: Fields with help functions

Fields can also be assigned a help function so that they are explained in more detail. The content of the help window is managed by the administrator. It must be created according to customers' individual needs and is controllable depending on the document type and field.

#### Only show post basket entries

You can set this refinement filter under the tab "Search favorites  $\rightarrow$  General  $\rightarrow$  Search  $\rightarrow$  Only show post basket entries".

Now, only entries that are in at least one post basket and have not yet been marked as finished will be shown in the hitlist.

Move the mouse over an entry in the hitlist. You will see information about the **post basket owner**.

| 2  | 90   | hits   | Company   | 01 Aufzug HABEL GmbH & Co. KC | i                          |         |
|----|------|--------|-----------|-------------------------------|----------------------------|---------|
| Dr | bg . | a colu | mn header | here to group by that column  |                            |         |
| -, | Ve   | Docur  | nent date | Document-type description     | Document t Sales Order no. | Postcoc |
|    |      | 9/20/3 | 2012      | Sales Correspondence          | 255                        | 78604   |
|    |      | 10/17  | /2013     | Accounting receipt            | 325                        | 78532   |
|    |      | 3/15/2 | 2012      | PUR Invoic Schmitt, Mike      | 130                        | 20097   |
|    |      | 5,0/2  |           | Functional Contraction        | 130                        | 20097   |
|    |      | 3/16/  | 2012      | PUR Invoice                   | 130                        | 73207   |
|    |      | 3/4/2  | 012       | PUR Invoice                   | 130                        | 73207   |
|    |      | 3/12/  | 2012      | PUR Invoice                   | 130                        | 36043   |
|    |      | 3/17/  | 2012      | PUR Invoice                   | 130                        | 36043   |

Fig. 14: Post basket owner

**Clear history** 

| More           | •                     |
|----------------|-----------------------|
| Search +       | Only show post basket |
| Directory tree | G Delete history      |



| Mor | ne   | ·          | ioning | Ŧ |                       |
|-----|------|------------|--------|---|-----------------------|
|     | Sea  | rch        | •      | Q | Only show post basket |
| 248 | Dire | ectory tre | e      | G | Delete history        |

The search history *Chapter 3.5 "Search history" on page 54* is deleted.

Fig. 15: Clear history

### 3.2.1.2 Directory tree

#### **Directory tree**

| Versioning       |  |  |  |
|------------------|--|--|--|
| h 🔸              |  |  |  |
| B Directory tree |  |  |  |
|                  |  |  |  |

In combination with *"HABEL EXPLORER Import"*, you can search for and view the documents in an *"explorer structure"* in the Search favorites. Display the directory tree in the Search favorites via *"General*  $\rightarrow$  *Directory tree"*.

|  | time Deed   |  |               | -                 |
|--|---|--|---------------|-------------------|
| MI-SEARCH HISTORY                              | 6   | 2  | 0             |                   |
| - RetCop 01 (Company 62                        |   | -  |               |                   |
| Bailing 01 ( Company 01                        |   |  |               |                   |
| Bullicy: 01   Company: 01   Projet no.: 505280 |   |  |               |                   |
|  | Roting (1) (Company 62<br>Boling (1) (Company (1) | MittadConstan:<br>Antige It (Consept R)<br>Antige 21 (Consept R) | MitadOversion | An SEARCH restorm |

#### Fig. 16: Directory tree

When you confirm the command, the column Directory tree (1) appears. Right-click on the Directory tree column to open the context menu that lets you perform the commands (2).

The context menu also includes the commands Open folder, *"Expand (all)"* and *"Collapse (all)"*.

The directory is defined for the search as follows. Select the directory and confirm the command *"Open folder."* 

All the records at this file level are then loaded into the memory. The hitlist with all hits is shown below this file level. The required hit can then be selected.



#### Fig. 18: Hitlist

In our example, all the documents under *"Protocols"* are now available in the memory and can be accessed.

Documents such as Drawings have not yet been loaded. They are therefore not currently accessible. If you want to have access to all documents, confirm the command *"Open folder"* at the highest level in the hierarchy. However, this can lead to longer waiting times because a larger quantity of data has to be loaded.

To see the origin of the data, the column *"Path origin"* can be displayed in the hitlist.

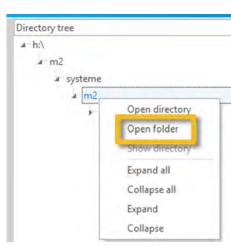


Fig. 17: Directory tree context menu



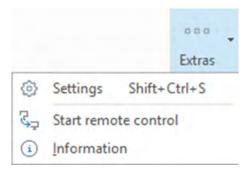
## 3.2.2 Versioning

| -                      | "Versioning<br>→ Versions"                             | When activated, opens a window with an overview of the versions.   |
|------------------------|--|--|
| Versioning<br>Versions | "Document<br>→ Versioning<br>→ Locked<br>documents"    | Shows a list of all locked documents when activated.   |
| Check in               | "Document<br>→ Versioning<br>→ My locked<br>documents" | When activated, opens all of the docu-<br>ments in the hitlist that have been locked<br>by the current user. |
| E Check out            | "Versioning<br>→ Check in"                             | The currently selected product is checked in when activated.   |
| Reset                  | "Versioning<br>→ Check out"                            | The currently selected product is checked out when activated.  |
| Fig. 19: Versioning    | "Document<br>→ Versioning                              | Locked documents can be reset here.  |

→ Reset"

## 3.2.3 More

### More





| "Selection list 		→ More" | "Settings"             | Opens the program settings in<br>which the configurations can be<br>performed.<br>Please refer to the following<br>chapter ♥ <i>Chapter 3.2.3.1 "Set-</i><br><i>tings" on page 22</i> for the descrip-<br>tions of the settings.                                   |
|---------------------------|------------------------|--|
|                           | "Start remote control" | When you execute the command<br>"Start remote control", you will be<br>taken automatically to the down-<br>load area and execution of Team-<br>Viewer. This enables a HABEL<br>employee to access your worksta-<br>tion and make adjustments or pro-<br>vide help. |
|                           | "Information"          | Under <i>"Information"</i> , you will find important details on your system version.   |

## 3.2.3.1 Settings

This menu item offers various setting options.

### [Save] and [Cancel] buttons

To make changes to the menu. Save this setting with the command *[Save]*. You can reset this setting to the original setting with the command *[Cancel]*.

After saving, the "Settings" menu is closed.

#### "Settings → General"

In the "General" section, you can define general settings.



| Keyboard shortcuts     Close application       External programs     Close with X       Document preview     Close with X       Hitlist     Scroll back with X       Archive Printer     Anchive Printer       Anchive Printer     Application       Annotations     Close orogram with X       Mail settings     History       • Annotations     Save history upon closing       • Note     Count history entries | General<br>– Document group order  | General   |      |       |
|--|--|---|------|-------|
| Layouts     Annotations     Note     Count history upon closing     Note     Text     Marker     Redaction   | External programs     View     Document preview     Hitlist     Print settings     Archive Printer     Anotations     Mail settings     Layouts     Annotations     Note     Text     Marker     Redaction | Close with X     Scroll back with X.     Minimize into Info area with X     Application |      |       |
|  |  | Save history upon closing<br>Count history entries                                      |      | ]¢]   |
|  |  |   | Save | Cance |

Fig. 20: "Settings → General"

| "Close<br>application"      | Selection "Close with X"                          | If this is selected in the settings, the application is closed with the " $X$ " button.  |
|-----------------------------|---|--|
|                             | Selection <i>"Scroll backwards with X"</i>        | If this is selected in the settings, the " $X$ " button is used to scroll back in the application's display. The application is closed in the last step. |
|                             | Selection <i>"Minimize to header area with X"</i> | If this is selected in the settings, the application is minimized to the header area with the <i>"X"</i> button. The application is not closed.          |
| "Application"               | Checkbox "Always on top"                          | If this checkbox is active, the application remains<br>active on the top at all times. It can still be minimized<br>though.                              |
| "History"                   | Checkbox <i>"Save history upon closing"</i>       | If this checkbox is active, the search history is saved when the application is closed.  |
| "Number of history entries" |   | Select the number of entries to be displayed in the search history.  |



"Settings → General → Document group order"

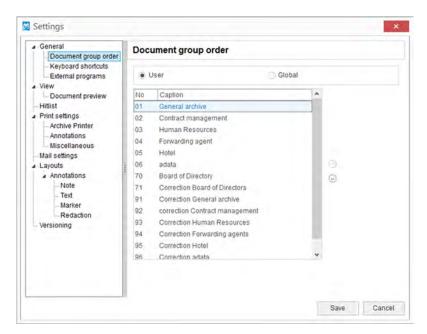


Fig. 21: "Settings → General → Document group order"

You can modify the order of the databases in the selection box. Internal numbering does not need to be changed for this. Move the selected group up or down using the *"arrow symbols"*. Alternatively, you can change the order using *"drag & drop"*.

| Selection of Selection of "user/global" | Selection of "user"   | When you select <i>"user</i> ", the adjusted sequence is saved <b>only for the current user</b> . |
|---|-----------------------|---|
|   | Selection of "global" | When you select <i>"global"</i> , the adjusted sequence is saved for <b>all users</b> .           |
|   |                       | Special authorizations are required for this.   |

"Settings → General → Keyboard shortcuts" The Editor lets you define your own keyboard shortcuts in order to invoke commands rapidly.



| General   | Keyboard shortcuts     |                           |
|---|------------------------|---------------------------|
| Keyboard shortcuts  | Commands               |                           |
| View  | Caption A Ke           | yboard shortcuts Keytip ^ |
| Document preview  | &Information           | 1                         |
| - Hitlist   | &Print .               | P                         |
| Print settings     Archive Printer  | &Save as               | s                         |
| - Annotations   | Add                    | FN                        |
| Miscellaneous   | Add receipt to process | A                         |
| Mail settings<br>Annotations<br>Note<br>Text<br>Marker<br>Redaction<br>Versioning | Assign printer         |                           |
|   | Collapse               |                           |
|   | Collapse all           | R                         |
|   | Collage a all          | v                         |
|   | Editor                 | Image                     |
|   | KeyTip I               |                           |
|   | ShortCut (None)        | 0                         |
|   |                        | 0                         |
|   |                        |                           |
|   |                        | Reset                     |

Fig. 22: "Settings → General → Keyboard shortcuts"

| "Commands" | Selection of "commands" | In the table, select the relevant command to which you would like to assign a keyboard shortcut.  |
|------------|-------------------------|---|
|            |                         | In the column <i>"Keyboard shortcut"</i> , you can define<br>the actual keyboard shortcut. If you enter a shortcut<br>that is already in use, you will see an error message.<br>The settings are saved on a user-dependent basis. |
| "Editor"   | Selection of "Editor"   | Define or change the keyboard shortcut in the table.  |

"Settings → General → External programs" Via editor access, you can set various display programs to be used for opening or printing the archived files.



| General     Document group order  | External programs   |  |
|---|---|--|
| Keyboard shortcuts     External programs     View     Document preview     Hitist     Print settings     Archive Printer     Annotations     Miscellaneous     Mail settings     Anotations     Note     Text     Marker     Redaction     Versioning | Definition of external viewers<br>**** Beispieleintrag ****<br>[Extensionthopen]<br>:Command=p:delphi.32thpwshow.exe<br>:Params=%1<br>[Extension!xtrpint]<br>:Command=notepad.exe<br>:Params=%1 |  |

Fig. 23: "Settings → General → External programs"

You want to open RTF files with **Microsoft Office Word**. First, remove the **semicolon** in the settings file. The semicolon means that the information after it will be ignored. By removing it, you cancel this effect.

Now add the file type (**Extension**) and the program you want to open the file with (**Command**).

| General     Document group order   | View  |  |
|--|---|--|
| - Keyboard shortcuts<br>- External programs<br>- View<br>- Document preview<br>- Hitlist<br>- Archive Printer<br>- Annotations<br>- Mail settings<br>- Layouts<br>- Annotations<br>- Mail settings<br>- Annotations<br>- Note<br>- Text<br>- Marker<br>- Redaction<br>- Versioning | Settings<br>Optimize document-display?<br>Keep zoom settings? |  |

Fig. 24: "Settings → View"

"Settings → View"

Example



| "Settings" | Checkbox <i>"Optimize document-<br/>display?"</i> | Displaying the document in grayscale gives better<br>quality representation on the screen. If you do not<br>check this option, the display will be in black and<br>white.   |
|------------|---|---|
|            | Checkbox <i>"Keep zoom settings?"</i>             | Save this setting if you want to display the same<br>area enlarged for multiple documents. The zoom<br>setting will then remain active for all documents that<br>you have selected in the hitlist and view under <b>View</b><br>in the document view. You can then scroll through<br>multiple documents in a zoomed state. To return to<br>the normal view, simply double-click on the docu-<br>ment. The <i>"Keep zoom settings"</i> option remains<br>active until it is deactivated. |



| General     Document group order  | Document preview  |       |
|---|---|-------|
| Keyboard shortcuts     External programs     View     Document preview     Hitist     Print settings     Archive Printer     Annotations     Mil settings     Layouts     Annotations     Note     Text     Marker     Redaction     Versioning | Preview<br>Preview-Interval (ms1<br>200<br>Document-preview page-count<br>0<br>Print message, when reaching this limit? | x 2 x |

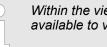
Fig. 25: "Settings → View → Document preview"

| "Preview" | Input <i>"Preview interval (ms)"</i>                | <i>"Preview interval"</i> is used to set how long the document is to appear in the document preview after it has been selected in the hitlist.<br>For example, if you are moving quickly up or down through the hits with the arrow keys and only want to view the document in the preview occasionally, you can set a higher interval. If you set a lower interval, the document will be displayed very quickly. This leads to a "chaotic" document preview if you scroll rapidly, as the documents are immediately displayed even if you actually only want to pass over them. |
|-----------|---|--|
|           | Input "Number of pages in document preview"         | The function <i>"Number of pages in document preview"</i> is used to set how many pages are to be loaded to the document preview. These can then be displayed in the document preview using the navigation function. 0 means <b>no limit</b> .   |
|           |   | These settings are useful for documents with very large numbers of pages, such as extensive financial accounting journals. If all pages are prepared for display in the document preview, this leads to a <b>long loading time</b> .   |
|           |   | In this case, it is advisable to limit the number of pages in the document preview.  |
|           | Checkbox <i>"Message if this limit is reached?"</i> | A message is shown if the limit is reached (Fig. 26).  |

If the documents are not in the cache directory (but on the jukebox, for example) and the interval is set very low (<1000 ms), almost every document will be recognized as selected when you scroll through the hitlist, and therefore a request will be sent to the jukebox to supply each of the documents. This slows performance.



Fig. 26: Limit of page preview reached



Within the view, all pages of the procedure are available to view.



"Settings → Hitlist"

| General     Document group order  | Hitlist   |                                      |
|---|---|--------------------------------------|
| Keyboard shortcuts     External programs     View     Loccument preview     Hitlist     Prints settings     Archive Printer     Annotations | General<br>Sorting is case-sensitive<br>Collapse hitlist after search<br>Show a goup's hit-count<br>0   | Display format of the number of hits |
| Miscellaneous Mail settings Layouts Annotations Note Text Marker Redaction Versioning   | Filter         Filter case-sensitive         Reset filter in case of another search         Activate filter         Hits         Show items in hittist         2000 | Maximum hit-count                    |
|   | Condensation Show mail condensed Combine documents Show "Combine documents"? 1000   | Document viewing delay               |

Fig. 27: "Settings → Hitlist"

| "General" | Checkbox <i>"Sorting is case-sensitive"</i>       | If you do not check this function, no distinction will<br>be made between uppercase or lowercase field con-<br>tent when sorting.                            |
|-----------|---|--|
|           | Checkbox <i>"Collapse hitlist after search"</i>   | This function is relevant if you group according to a database field. If this setting is activated, the hitlist is collapsed after the search is started.    |
|           | Checkbox <i>"Show a group's hit count"</i>        | If you activate this function, the number of hits in the hitlist appears for each group (00 stands for the two decimal places).Fig. 28                       |
|           | Entry "Display format of hit count"               | Specify the display format of the hit count (00 stands for two decimal places).  |
|           |   | You can add preceding alphanumeric characters so that <i>"Count=00"</i> could be entered here, for example Fig. 28.  |
| "Filter"  | Checkbox <i>"Filter is case-sensitive"</i>        | If the checkbox is <b>deactivated</b> , the filter will not dis-<br>tinguish between uppercase or lowercase field con-<br>tent.                              |
|           | Checkbox "Reset filter in case of another search" | If this checkbox is <b>deactivated</b> , the set filter will<br>remain active in a new search and the search result<br>will be refined accordingly.          |
|           | Checkbox "Activate filter"                        | Within the hitlist, you can make a clear selection<br>with the aid of filter functions. If you do not want to<br>use the filter, you can deactivate it here. |



| "Hits"                 | Checkbox "Show items in hitlist"      | If you check this function, the items in the hitlist will also be shown.   |
|------------------------|---------------------------------------|--|
|                        | Entry <i>"Maximum hit count"</i>      | Use this option to set the maximum number of hits in<br>the hitlist. This enables you to reduce the search<br>time for searches with an extremely high number of<br>results. If there are more hits than the maximum hit<br>count that you have set, a message appears.  |
| "Condensation"         | Checkbox "Show mail<br>condensed"     | If you check this function, display of the archived e-<br>mails is condensed. E-mails are archived both as a<br>TIFF file and in their original format (Microsoft Out-<br>look, Lotus Notes, Mozilla Thunderbird). If you acti-<br>vate <i>"Show mails condensed"</i> , the e-mail will be<br>shown as a hit in the hitlist.                   |
|                        |                                       | If an e-mail is shown condensed (provided it was<br>archived in the original format with or without attach-<br>ments), it can nonetheless be opened in the original<br>format if you call up the entry and open the file that<br>is displayed separately by double-clicking it. The e-<br>mail can then be edited again (reply, forward etc.). |
| "Combine<br>documents" | Checkbox "Display combine documents?" | This function lets you specify that combined documents are to be displayed.  |
|                        | Entry "Delay when reading"            | This option is used to set the number of milliseconds<br>until the system displays whether this entry is com-<br>bined with others, when you scroll through the hitlist.   |

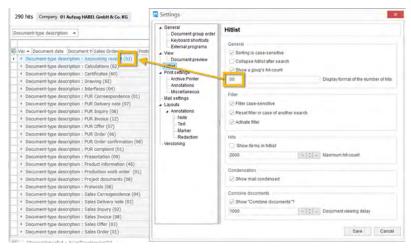


Fig. 28: Hitlist – General



| Document-type description  | Settings  |  |  |
|--|---|--|--|
| <ul> <li>Ver          <ul> <li>Document date</li> <li>Document dyse</li> <li>Document-type description: - Accounting race: (Anzahi-not)</li> <li>Document-type description: - Calculations (Anzahi-not)</li> <li>Document-type description: - Calculations (Anzahi-not)</li> <li>Document-type description: - Disterization (Anzahi-not)</li> <li>Document-type description: - Disterization (Anzahi-not)</li> <li>Document-type description: - Place Careeropondence (Anzahi-not)</li> <li>Document-type description: - Place Disterization (Anzahi-not)</li> <li>Document-type description: - Production (Mnzahi-not)</li> <li>Document-type description: - Production (Mnzahi-not)</li> <li>Document-type description: - Protocotic (Anzahi-not)</li> <li>Document-type description: - Protocotic (Mnzahi-not)</li> <li>Document-type description: - Protocotic (Mnzahi-not)</li> <li>Document-type description: - States Distrips value (Anzahi-not)</li> <li>D</li></ul></li></ul> | Active Printer     Active Printer     Active Printer     Active Printer     Macestaneous     Macestaneous     Macestaneous     Active Printer     ActivePrinter     ActivePrinter     Active Printer     Active Printer | Hillist  General  Display format of the number of the  Analation  Display format of the number of the  File  General  Analation  Display format of the number of the  File  General  Analation  General  General |  |

Fig. 29: Hitlist example

| Document group order<br>Keyboard shortcuts<br>External programs     View     Document preview     Hitlist     Print settings     Archive Printer     Annotations     Mais settings     Layouts     Annotations     Note     Text     Marker     Redaction     Versioning |  |
|--|--|
|  |  |

Fig. 30: "Settings → Print settings"

This is where you select the standard printer for print processes.

The administrator can define here what **text is to be printed on the document.** 

"Settings → Print settings"

"Settings → Print settings → Archive printer"



| General     Document group order  | Archive Printer   |
|---|---|
| Keyboard shortcuts<br>External programs<br>View<br>Document preview<br>Hittist<br>Archive Printer<br>Annotations<br>Mai settings<br>Annotations<br>Mai settings<br>Annotations<br>Note<br>Text<br>Redaction<br>Versioning | User     Global The following text can be printed on the document Text Print text? Always Never Upon request Document type Print COLD? Print documents/graphics |

*Fig.* 31: "Settings → *Print* settings → *Archive* printer"

|  | Checkbox <i>"User</i> "  | Select <i>"User"</i> to specify whether the settings should only apply to the current user.  |
|--|--------------------------|--|
|  | Checkbox "Global"        | Select <i>"Global"</i> to specify that the settings should apply to all users.   |
|  |                          | Special authorizations are required for this.  |
| <i>"The following text can be printed on the document"</i> | Entry <i>"Text"</i>      | Enter the text that should be printed on the document.   |
| "Print the text?"  | Selection of "Always"    | With this selection, the specified text is always printed.   |
|  |                          | This can be selected by users themselves. The same applies to printing COLD documents and/or documents archived in other ways (document type). |
|  | Selection of "Never"     | With this selection, the specified text is never printed.  |
|  |                          | This can be selected by users themselves. The same applies to printing COLD documents and/or documents archived in other ways (document type). |
|  | Selection "Upon request" | With this selection, the specified text is printed upon request.   |
|  |                          | This can be selected by users themselves. The same applies to printing COLD documents and/or documents archived in other ways (document type). |
|  |                          | This can be selected by users themselves. The same applies to printing COLD documents and/or documents archived in other ways (document        |



"Document type"

Checkbox "Print if COLD?" Checkbox "Print if documents/

graphics?"

Imprint of the texts on so-called COLD documents.

Imprint of the texts on graphics/other documents such as PDF

#### "Settings → Print settings → Annotations"

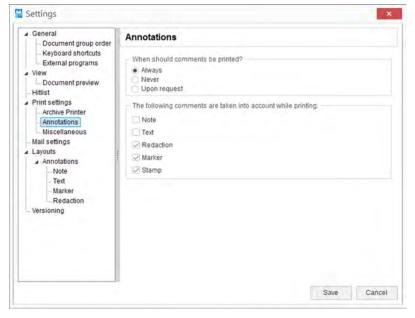


Fig. 32: "Settings → Print settings → Annotations"

| <i>"When should annotations be unists 10"</i>  | Selection of "Always"       | With this selection, the specified text is always printed.                  |
|--|-----------------------------|---|
| printed?"                                      | Selection of "Never"        | With this selection, the specified text is never printed.                   |
|  | Selection of "Upon request" | With this selection, the specified text is printed upon request.            |
| "The following                                 | Checkbox "Note"             | If this checkbox is active, all notes are also printed.                     |
| annotations are<br>considered for<br>printing" | Checkbox "Text"             | If this checkbox is active, all text fields are also printed.               |
|  | Checkbox "Redaction"        | If this checkbox is active, all <i>"Redaction"</i> fields are also printed. |
|  | Checkbox "Marker"           | If this checkbox is active, all markers are also printed.                   |
|  | Checkbox <i>"Stamp"</i>     | If this checkbox is active, all stamps are also printed.                    |



"Settings → Print settings → Other"

| General     Document group order   | Miscellaneous                                      |  |  |  |
|--|--|--|--|--|
| Keyboard shortcuts<br>External programs<br>View<br>Document preview  | Print info line<br>Alwäys<br>Never<br>Upon request | Print accounting info<br>Always<br>Never<br>Upon request | Print header?<br>Always<br>Never<br>Upon request |  |
| Print settings Archive Printer Anotations Miscellaneous Mail settings Layouts Anotations Note Text Marker Redaction Versioning | Print mail<br>Always<br>Never<br>Upon request      | Print background<br>Aways<br>Never<br>Upon request       |  |  |
|  |  |  |  |  |

*Fig.* 33: "Settings → *Print* settings → *Other*"

If the settings define that, within the scope of HABEL CONNEC-TION, the document is to be printed immediately rather than displayed, the same settings as for the archive printer are possible. For direct printing, the option *"Print annotations"* and a **printer selection** can also be used. Please note that the only options available here are *"Always print"* or *"Never print"*.

The **info line** displays the content of an info field. With the Print info line menu, you can set whether the content of the info field is to be printed always, never or upon request.

If account assignment information was provided for your document with the additional module **HABEL ACCOUNT ASSIGNMENT STAMP**, you can use the Print accounting info to set whether this information is to be printed with the document.

Detailed information on **HABEL ACCOUNT ASSIGNMENT STAMP**can be found here  $\Leftrightarrow$  Chapter 5.3 "HABEL ACCOUNT ASSIGNMENT STAMP" on page 81.

In the **Print header** menu, you can set whether the header is to be printed. The header consists of defined database fields.

If the archived document is an e-mail, you can use the *"Print mail with attachment"* menu to select whether the attachment is to be printed with the document.

If you are using the additional module **HABEL DYNAMIC FORM STORAGE**, the stored form can be displayed if required. To set whether the background form is to be printed with the document, use the *"Print background menu"*.



#### "Settings → Mail settings"

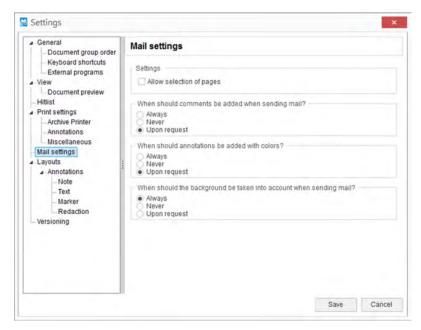


Fig. 34: "Settings → Mail settings"

Use the menu item *"Show page selection"* to define whether the system is to ask which pages to send when e-mailing archived multi-page documents.

For this, you need the additional module HABEL E-MAIL.

Here, you can also set whether:

- To add annotations when sending e-mails
- To add these in color
- To take background forms into account



#### "Settings → Layouts"

| General Document group order Keyboard shortcuts External programs View Document preview Hitlist Print settings Archive Printer Annotations Mai settings Annotations Note Text Marker Redaction Versioning | Layouts  |               |   |   |
|---|--|---------------|---|---|
|   | Layout   |               |   |   |
|   | Hitlists   | Copy layout   |   |   |
|   | → HabelMono<br>Input masks<br>HabelInputtemplate | EditLayout    |   |   |
|   |  | Delete layout |   |   |
|   |  |               |   |   |
|   | Altocate   |               |   |   |
|   | Hitlist  |               |   |   |
|   | HabelMono  |               | 4 |   |
|   | Selection window                                 |               |   |   |
|   | HabelMono  |               |   | ~ |
|   | Input masks                                      |               |   |   |
|   | HabelInputtemplate                               |               |   | ~ |
|   |  |               |   |   |
|   |  |               |   |   |

Fig. 35: "Settings → Layouts"

In this area, you can define layouts for the graphic representation of the hitlist. These are then available for the editing process. You can configure settings relating to colors, fonts and font sizes for all elements of the masks. To do this, select the required layout, click the **Edit Layout** button, and modify the layout.

You can define which layout is applied to which element in the Allocate area. You can define separate, different layouts for the hitlist, selection window and input masks.

You can also create your own layouts as follows:

| General     Document group order     Keyboard shortcuts     External programs | Layouts                              |             |                         |        |
|---|--------------------------------------|-------------|-------------------------|--------|
|   | Layout                               |             | -                       |        |
| View<br>Document preview  | Hitlists     HabelMono               | Copy layout |                         |        |
| Hitlist   | <ul> <li>Input masks</li> </ul>      | EditLayout  |                         | _      |
| StyleSheet Editor   |                                      |             | Color                   | ×      |
|   |                                      |             | Basic colors:           | _      |
| tyles P   | review                               |             |                         |        |
| adams ad  |                                      |             |                         |        |
| andBackground   | Date *                               |             |                         |        |
| landrieader   |                                      | Band        |                         |        |
| ontent  | Text                                 | Currency    |                         |        |
| ContentEven   | # Date : 3/16/2015                   |             |                         |        |
| iterBox   | ABC                                  | 420         |                         |        |
| iterRowInfoText   | Check the preview style              |             |                         |        |
| indPanel  | <ul> <li>Date : 3/17/2018</li> </ul> |             | Custom colors:          |        |
| ooter 🔶   | ABC                                  | 300         |                         |        |
| Bitmap  | Check the preview style              |             |                         |        |
|   | <ul> <li>Date : 3/18/2018</li> </ul> |             |                         |        |
| + 🗹 golor [ 3   | IABC                                 | 200         | Define Custom Colors >> | J      |
| Eont  |                                      | \$1,005.00  | OK Cancel               |        |
| in the second   |                                      |             |                         |        |
|   |                                      |             |                         |        |
|   |                                      |             | OK                      | Cancel |

### Fig. 36: Own layouts

- **1.** Copy an existing layout (1).
- **2.** Select the corresponding fields, backgrounds etc. (2).



- 3. Define the **Bitmap** (store images), **Color** (store colors (3 + 4)) and **Font** (store fonts).
  - ⇒ In the Preview window, you will see a preview showing the effects on the masks.

| Document type A      |                    | 0          |  |                  |                       |                                  |
|----------------------|--------------------|------------|--|------------------|-----------------------|----------------------------------|
| Versioniert 5        | Document-type de:  | Sales Orde | Poster Location                                | Projet Project N | Article description   | Subject                          |
| - Document type : 10 |                    |            | T TATLE LA |                  | Lances accertain      |                                  |
| 1/19/2018            | PUR Inquiry        | 290001     | 20095 Hamburg                                  | 2 Turm AG        | Stahltür, Modell H 8  | zu Projekt Turm AG No 6002       |
| 2/12/2012            | PUR Inquiry        | 290001     | 20095 Hamburg                                  | 60020( Turm AG   | Stahltür, Modell H 8  | zu Projekt Turm AG No 6002       |
| 2/12/2012            | PUR Inquiry        | 290001     | 20095 Hamburg                                  | 60020( Turm AG   | Glastürsystem, Mode   | zu Projekt Turm AG No 6002       |
| 2/12/2012            | PUR Inquiry        | 290001     | 36043 Fulda                                    | 60020( Turm AG   | R1 kompakt, Stahlfa   | -                                |
| 2/12/2012            | PUR Inquiry        | 290001     | 36043 Fulda                                    | 60020( Turm AG   | R8 exklusiv, Stahlfal | (3)                              |
| 2/12/2012            | PUR Inquiry        | 290001     | 73207 Plochingen                               | 60020( Turm AG   | Boden Parkett         | $\mathbf{\overline{\mathbf{v}}}$ |
| 2/12/2012            | PUR Inquiry        | 290001     | 73207 Plochingen                               | 600200 Turm AG   | Boden Teppich         |                                  |
| A Document type : 10 | 5 PUR Offer (Anzal | hl=07)     |  |                  |                       |                                  |
| 2/13/2012            | PUR Offer          | 290001     | 73207 Plochingen                               | 60020( Turm AG   | Dämmung               |                                  |
| 2/15/2012            | PUR Offer          | 290001     | 36043 Fulda                                    | 60020( Turm AG   | 3 + 2 ANC Motor       |                                  |
| 2/13/2012            | PUR Offer          | 290001     | 73207 Plochingen                               | 600200 Turm AG   | Dämmung               |                                  |
| 2/12/2012            | PUR Offer          | 290001     | 20095 Hamburg                                  | 600200 Turm AG   | Stahltür, Modell H 8  | zu Projekt Turm AG No 6002       |
| 2/12/2012            | PUR Offer          | 290001     | 20095 Hamburg                                  | 60020( Turm AG   | Glastürsystem, Mode   | zu Projekt Turm AG No 6002       |
| 2/15/2012            | PUR Offer          | 290001     | 36043 Fulda                                    | 60020( Turm AG   | R8 exklusiv, Stahlfal |                                  |
| 2/14/2012            | PUR Offer          | 290001     | 73207 Plochingen                               | 600200 Turm AG   | Boden Teppich         | korrigiertes Angebot zu AG-I     |
| Document type : 11   | 10 PUR Order (Anza | hl=06)     |  |                  |                       |                                  |
| 2/12/2012            | PUR Order          | 290001     | 20095 Hamburg                                  | 600200 Turm AG   | Stahltür, Modell H 8  | zu Projekt Turm AG No 6002       |
| 2/12/2012            | PUR                | 290001     | 20095 Hamburg                                  | 60020( Turm AG   | Glastürsystem, Mode   | zu Projekt Turm AG No 6002       |
| 2/15/2012            | PUR 6              | 290001     | 36043 Fulda                                    | 600200 Turm AG   | R1 kompakt, Stahlfa   |                                  |
| 2/15/2012            | PUR Order          | 290001     | 36043 Fulda                                    | 600200 Turm AG   | R8 exklusiv, Stahlfal |                                  |
| 2/15/2012            | PUR Order          | 290001     | 73207 Plochingen                               | 60020( Turm AG   | Boden Parkett         |                                  |
| Coriginaldateipfad   | = h:\)             |            |  |                  |                       | Customiz                         |
|                      |                    |            | -  |                  |                       |                                  |
|                      |                    |            |  |                  |                       |                                  |

<No data to display>

# Important fields in the hitlist

Fig. 37: Important fields in the hitlist



| Keyboard shortcuts |                              | Lay | outs         |                     |           |          |      |     |   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |             |        |  |  |  |  |
|--------------------|------------------------------|-----|--------------|---------------------|-----------|----------|------|-----|---|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|-------------|--------|--|--|--|--|
|                    |                              | La  | yout         |                     |           |          |      |     |   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |             |        |  |  |  |  |
| Vie                |                              |     | Hitlists     | no                  | Copy lay  |          |      |     |   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |             |        |  |  |  |  |
| Ha                 | liet .                       |     | tonid mantes |                     | Editian   | out.     | -    |     |   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |             |        |  |  |  |  |
| F                  | StyleSheet Editor            |     |              |                     |           | *        |      |     |   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |             |        |  |  |  |  |
| T                  |                              | -   |              |                     |           |          |      |     |   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |             |        |  |  |  |  |
|                    | Styles                       |     | Preview      |                     |           |          |      |     |   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |             |        |  |  |  |  |
| -1                 | Background<br>BandBackground |     | Date 🔺       |                     |           | ^        |      |     |   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |             |        |  |  |  |  |
| L                  | L BandHeader<br>Content      |     | 1            |                     |           |          |      |     |   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |             |        |  |  |  |  |
|                    |                              |     | Text         | Currency            | Date      | ^        |      |     |   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |             |        |  |  |  |  |
|                    | ContentEven                  |     |              |                     |           |          |      |     |   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | # Date : 1/ | 9/2018 |  |  |  |  |
|                    | FilterBox                    |     |              | ABC                 | 400       | 1/9/2018 | - 61 |     | 4 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |             |        |  |  |  |  |
|                    | FilterRowInfoText            |     |              | k the preview style |           |          |      |     |   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |             |        |  |  |  |  |
| N                  | FindPanel                    |     | # Date : 1/  |                     |           |          | -    | 100 |   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |             |        |  |  |  |  |
| -1                 | Footer                       | Y   | ABC          | 300                 | 1/10/2018 |          |      | ~   |   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |             |        |  |  |  |  |
|                    | Bitmap                       |     |              | k the preview style |           |          |      |     |   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |             |        |  |  |  |  |
| - 11               | Color                        |     | # Date : 1/  |                     |           |          |      | ~   |   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |             |        |  |  |  |  |
|                    |                              |     | ABC          | 200                 | 1/11/2018 | -        |      |     |   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |             |        |  |  |  |  |
|                    | Eont                         |     |              | \$1,000.00          |           | ÷        |      |     |   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |             |        |  |  |  |  |
|                    |                              |     |              |                     |           |          |      |     |   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |             |        |  |  |  |  |

Fig. 38: Styles

The fields of the input mask are defined under "Settings  $\rightarrow$  Layouts  $\rightarrow$  StyleSheet Editor".

| Item | Caption     | Description   |
|------|-------------|---|
| 1    | Background  | Defines the free space in the back-<br>ground.  |
| 2    | ContentEven | Together with <i>"ContentOdd"</i> , for-<br>mats the colors/font size of the<br>rows in the view (alternately).         |
| 3    | ContentOdd  | Together with <i>"ContentEven"</i> , for-<br>mats the colors/font size of the<br>rows in the view (alternately).        |
| 4    | Group       | Influences the display of the grouping.   |
| 5    | Header      | Influences the column header, but<br>can only affect the font and font<br>size, depending on the pre-<br>selected skin. |
| 6    | Selection   | Formats the selected rows.  |

In addition, by selecting **Postbasket**, you can set the color of an entry when it is in a post basket for editing. The color and font/font size defined under **Inactive** influences how the row is displayed when it is inactive. This is the case, for example, if you select rows and calculate totals for the columns.



#### "Settings → Layouts → Annotations"

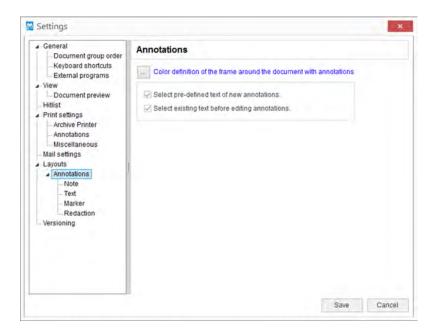


Fig. 39: "Settings → Layouts → Annotations"

In this area, you can define the color of the frame around documents with annotations. The selected color is shown on the basis of the font color. In our example, it is blue.



Fig. 40: Frame around documents with annotations



"Settings → Layouts → Annotations → Note"

| General  | Note  |        |
|--|---|--------|
| Keyboard shortcuts     External programs      View     Document preview     Hitlist     Print settings     Archive Printer | Display active note     Font (based on a resolution of 200 dpl)     Background color     Definition of preassigned text |        |
| - Annotations  | 🔘 User 💿 Global   |        |
| Mili settings Mail settings Layouts Annotations Note Text Marker Redaction Versioning                                      | Erstellt von: \$UsrNName\$ \$UsrNName\$<br>Am: \$Date\$   | 3<br>2 |
|  |   |        |

Fig. 41: "Settings → Layouts → Annotations → Note"

If you do not activate the checkbox *"Display active note"*, notes attached to the document appear only as pins.

To display the note, you need to click on the pin. You can define settings for the note in the **Font** and **Background color** menus. The default setting for the notes is red lettering on a yellow back-ground. Additional settings for the **Definition of preassigned text** can be configured by the administrator for each **User** individually or on a **Global** basis.

|  | Document group order   | General     Document group order     Text          |          |            |  |
|--|--|--|----------|------------|--|
|  | <ul> <li>Keyboard shortcuts</li> <li>External programs</li> <li>View</li> <li>Document preview</li> </ul>                  | Font (based on a reso<br>Definition of preassigned |          |            |  |
|  | - Hitlist  | O User   | . Global |            |  |
|  | Print settings     Archive Printer     Anotations     Miscellaneous     Mail settings     Layouts     Annotations     Note | 4  |          | (4)<br>(4) |  |
|  | - Text<br>- Marker<br>- Redaction<br>- Versioning  |  |          |            |  |
|  |  |  |          |            |  |

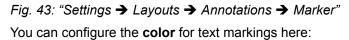
Fig. 42: "Settings → Layouts → Annotations → Text"

## "Settings → Layouts → Annotations → Text"



"Settings → Layouts → Annotations → Marker" As an administrator, you can set the **Font** and **preassigned text** for text inputs here. You can also set whether this is to apply to each **User** or on a **Global** basis.

| a General   | Marker       |       |
|---|--------------|-------|
| Occurrent group order     Keyboard shortcuts     External programs      View     Document preview     Hitlist     Archive Printer     Annotations     Mail settings     Layouts     Annotations     Note     Text     Marker     Redaction     Versioning | Color Yellow | ¥   m |
|   |              |       |



| General     Document group order  | Redaction   |  |
|---|-------------|--|
| View     External programs     View     Document preview     Hitlist     Print settings     Archive Printer     Annotations     Miscellaneous     Mail settings     Layouts     Annotations     Note     Text     Marker     Redaction     Versioning | Color Elack |  |

Fig. 44: "Settings → Layouts → Annotations → Redaction" Here you can set the **color** for the editorial entry.

- "Settings → Layouts → Annotations → Redaction"



"Settings → Layouts → Versioning"

| Keyboard shortcuts     User       External programs     User       View     Work directory       Document preview     Hillist       Print settings     Archive Printer       Annotations     Miscellaneous       Mail settings     Image: State Stat | oup order | ersioning |      |  |
|--|-----------|-----------|------|--|
| Print settings         Archive Printer         Annotations         Miscellaneous         Mail settings         Layouts         Annotations         Note         Text         Marker         Redaction  | rams V    |           | Defa |  |
|  | IS        |           |      |  |

Fig. 45: "Settings → Layouts → Versioning"

Here you can specify the work directory for the versioning. This directory is user-dependent.

| 3.2.3.2 | Start remote control |  |
|---------|----------------------|--|
|         |                      | When you execute the command "Start remote control", you will<br>be taken automatically to the download area and execution of<br>TeamViewer. This enables a HABEL employee to access your<br>workstation and make adjustments or provide help. |
| 3.2.3.3 | Information          | Under <i>"Information"</i> , you will find important details on your system version.   |
| 3.3 S   | earch screen         |  |
|         |                      | For the retrieval, you need search terms. Various entry fields are provided for this purpose. You can combine as many fields as you  |

wish. The more entry fields you fill in, the more precise the search.



# 3.3.1 Search parameter

| SEARCH                       | -        | 01                |           | >       |
|------------------------------|----------|-------------------|-----------|---------|
| Company                      |          | 2                 |           |         |
| 01 Aufzug HABEL Gmbl         | B Co KG  | A                 |           |         |
| 11                           | Tu conto | Account           |           |         |
| Document type                |          | Account descrip   |           |         |
|                              | ~        | Article descripti | on        |         |
| Document date                |          | Article no.       |           |         |
|                              |          | 8                 |           |         |
| 11                           | <b></b>  | ✓ Barcode         |           |         |
| Date of archiving            |          | Batch no.         |           |         |
| // 菌 //                      |          | C                 |           |         |
|                              |          | Company           |           |         |
| Document no.                 |          | Contact Name      |           |         |
|                              |          | Cost center acc   | ount      |         |
| and the second second second |          | Cost center obj   | ect       |         |
| Customer/Supplier No.        |          | Country code      |           |         |
|                              | 8        | Customer/Supp     | lier Name |         |
| Sales Order no.              |          | Customer/Supp     | lier No.  |         |
| Sales Order no.              |          | D                 |           |         |
|                              |          | Date of archivir  | ia.       |         |
| Sales Offer no.              |          | Delivery note e   |           |         |
|                              | 1        | E Document date   |           |         |
|                              |          | Document no.      |           |         |
| Projet no.                   |          | Document type     |           |         |
|                              | 8        | Drawing descrit   |           |         |
|                              | 8        | Drawing no.       |           |         |
| Subject                      |          | E                 |           |         |
|                              |          | E-mail address    |           |         |
|                              |          | Expense accou     |           |         |
| Full text                    |          | Expense accou     |           |         |
|                              |          | External article  |           |         |
| Barcode                      |          | External docum    |           |         |
|                              |          | F                 |           |         |
|                              |          |                   |           |         |
| File no.                     |          | File no.          |           |         |
|                              | ***      |                   |           |         |
|                              |          | G                 |           |         |
|                              |          | gross amount      |           |         |
|                              |          | 1                 |           |         |
|                              |          | information box   |           |         |
|                              |          | Tovoice existing  | 2         |         |
|                              |          | Save              | Order     | Discard |

## Fig. 46: Search parameter

### 1 [Add border/mark] button

The search fields for the search screen can be defined in the search parameters. Select the fields that you would like to specify for a search.

By using the *[Sort]* button, the sequence of the search fields can be adjusted.



# 3.3.2 Search screen

|                           |                            | Luin |
|---------------------------|----------------------------|------|
| Company                   |                            |      |
| 01                        | Aufzug HABEL GmbH & Co. KG | ~    |
| Document typ              | pe                         |      |
|                           |                            | ~    |
| Document da               | te                         |      |
| 11                        | m //                       | Ē    |
| Date of archiv            | ing                        |      |
| 11                        | m //                       | -    |
| Document no               | •                          |      |
| Customer/Su               | pplier No.                 |      |
|                           |                            | E    |
| Sales Order no            | ).                         |      |
| Sales Offer no            |                            |      |
| Proj <mark>et no</mark> . |                            | E    |
| Subject                   |                            | E    |
| Full text                 |                            |      |
|                           |                            |      |
| Barcode                   |                            |      |
| Barcode_<br>File no.      |                            |      |

Fig. 47: Search (example)



#### Selection boxes

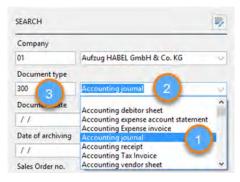


Fig. 48: Selection boxes

With these fields, you can choose from predefined terms (1). To open the selection box, click on the arrow at the end of the entry field (2).

Instead of selecting from the list, you can control the selection by entering data in the field. The matching term will then be displayed. These selection boxes can also be stored on a document typedependent basis.

The entry field in the selection boxes is split. In the field on the left, you can enter a number, known as the document type key (3). Each document type can be assigned one of these keys.

Basically, with split fields you can choose whether you want to enter the key or use the selection box. The other field is automatically filled in each case.



#### **Date fields**

Document date

11

4

1

2 7

3 4 21

5

6

31

14

28

4

You can enter dates in date fields in various ways. You can either enter the date manually or use the date selection.



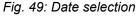
When entering digits, do not separate them with periods.

#### Table 1: Manual entry

| Input              | Result     |
|--------------------|------------|
| 010108 or 01012008 | 01.01.2008 |

With this option, you choose the date from the calendar.

| Table E. Bate coulinge      |  |
|-----------------------------|--|
| Input                       | Result   |
| . (period)                  | Today's date   |
| +1, +2, +3, -1, -2, -3 etc. | Today's date +1 day, +2 days,<br>+3 days, –1 day, –2 days, –3<br>days etc.     |
| 1+, 2+, 3+                  | 1st, 2nd, 3rd day of the current month/year                                    |
| 01, 02, 03                  | 1st, 2nd, 3rd day of the current<br>month/year (only for from-until<br>fields) |



You can also write across the separating periods of the field (e.g. +100)

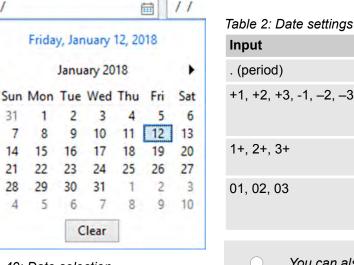
With this option, you choose the date from the calendar.

**Default fields** 

In the default fields, the search terms are entered manually. The entered term must match the term captured during archiving. Input is not case sensitive. If you are not sure how to write the term or the field might possibly contain other terms, you can use the wildcard\* to perform a wildcard search.

Place the wildcard in front of or after the word or word fragment. If you only enter the wildcard \* in the field, the entries will be shown in which this field is not empty.

To search for empty fields, enter a question mark (?).





## Fields with master data access

| Select rec | o d                       |         |                   |      |  | 2 |
|------------|---------------------------|---------|-------------------|------|--|---|
| Kunden-/Li | ustomer/Supplier Name     | Post    | Location          | Coun | E-mail address                               | 1 |
| 01121212   | sotsmeyer's Furnishings   | FL 3712 | Miami             | US   | spotsmeyer's.furnishings@cronuscorp.net      | 1 |
| 01445544   | Progressive Home Furnishi | IL 6123 | Chicago           | US   | progressive.home.furnishings@cronuscorp.net  |   |
| -014 2     | New Concepts Furniture    | GA 317  | Atlanta           | US   | new.concepts.furniture@cronuscorp.net        |   |
| 01905      | Candoxy Canada Inc.       | ON PTE  | Thunder Bay       | CA   | candoxy.canada.inc@cronuscorp.net            |   |
| 01905899   | Elkhorn Airport           | MB ROM  | Elkhorn           | CA   | elkhorn.airport@cronuscorp.net               |   |
| 01905902   | London Candoxy Storage C  | ON N6   | London            | CA   | london.candoxy.storage.campus@cronuscorp.net |   |
| 10000      | Möbel-Meller KG           | 48436   | Düsseldorf        |      | mobel-meller.kg@cronuscorp.net               |   |
| 10674      | Turm AG                   | 60308   | Frankfurt am Main |      | info@turmag.de                               |   |

Fig. 50: Master data access

With the master data access, you can access external master data from fields. The symbol at the end of the entry field shows whether master data access is stored for a field (1).

When you have entered a term, click on the symbol. You can then access the master data which is provided externally, such as the customer master data, supplier master data or article master data.

Alternatively, you can also use the function key combination [*Ctrl*] + [*L*]. If you do not enter a term, all the data that are part of the master data will be shown. You will see a selection box with master data, from which you can make a selection (2).

When you transfer the data, the search field is filled with the terms as they are specified in the master data.



## 3.3.2.1 Index search and full text search

#### Index search

For the index search, enter terms in the different entry fields. Fields that you do not fill in will not be included in the search.

The more fields you fill in, the more precise the result. You can combine all entry fields with each other. This is done using **AND links**.

#### Example 1:

| Company       |               |            |   |
|---------------|---------------|------------|---|
| 01            | Aufzug HAB    | Ý          |   |
| Customer/Sup  | olier No.     |            |   |
| 10674         |               | 8          |   |
| Customer/Supp | olier Name    |            |   |
| Turm AG       |               | 8          |   |
| Document date |               |            |   |
| 03/01/2016    | <b></b>       | 05/31/2016 |   |
| Document type |               |            |   |
| 235           | Sales Invoice |            | ~ |

You are searching for all sales invoices that were issued for the customer **Turm AG** in the period from March to May 2016. To do this, select the *"Document type"* Sales Invoice. Enter Turm AG in the *"Customer/Supplier name"* field and 03.01.2008 and 05.31.2008 in the *"Document date"* fields.

Fig. 51: Combined index search

Example 2:



| Company        |              |        |
|----------------|--------------|--------|
| 01             | Aufzug HABEL | Gmbł 🗸 |
| Document dat   | te           |        |
| 11             | 茴 //         | t      |
| Customer/Sup   | oplier No.   |        |
|                |              | 8      |
| Date of archiv | ing          |        |
| 11             | 圖 //         |        |
| Projet no.     |              |        |
|                |              | Ē      |
| Sales Order no |              |        |
| Document typ   | e            |        |
|                |              | $\sim$ |
| Net amount     |              |        |
| Subject        |              |        |
| Meeting        |              |        |

You are searching for all documents with the subject **Protocol**. Enter the term in the *"Subject"* field.

You can also search across all companies by clearing the *"Company"* field.

Full text search

If you use the full text search, the additional entry field *"Full text"* will be active in the input mask. Enter the term you want to search for in this field.

The search extends across **all documents** and all document content that has been activated for the full text search. There are various input options

| and     | Search for multiple terms that all need to appear in the document.                  |
|---------|---|
| or      | Search for multiple terms, of which one or another needs to appear in the document. |
| and not | Search for multiple terms, of which one must not appear in the document.            |



| * | Wildcard for multiple letters, characters:<br>The term is only a part of the term being<br>searched for e.g. user* brings up user<br>manual, user rights etc. |
|---|---|
| ? | Wildcard for individual letters or charac-<br>ters.   |

As soon as you start the search, you will see a hitlist with all documents that match the selected term(s). The hits are highlighted in color in the TIFF documents, if this has been configured.

Mark all hits and open the *[More]* menu in the document view. You can jump from hit to hit by clicking *"Go to next hit"* or *"Go to previous hit"*. This takes you to hits not only within the document, but also in other documents, if you have selected multiple documents.

As well as the pure full text search or index search, you can also combine the search variants. To do this, enter search terms as in the index search and fill the Full text or Content field with a further term. The full text search will then be limited to documents determined by the search terms entered.

#### 3.3.2.2 Find — Clear — Start new search

When you have entered the search criteria, you can start the search with the *[Find]* button or the shortcut *[Ctrl]* + *[F]*. The hits are then displayed in the hitlist and the *"Hitlist"* button is active.

To return to the entry fields in the retrieval mask, click the *[Back]* button. All the fields with entries can be cleared by clicking the *[Clear]* button.

# 3.4 Search favorites

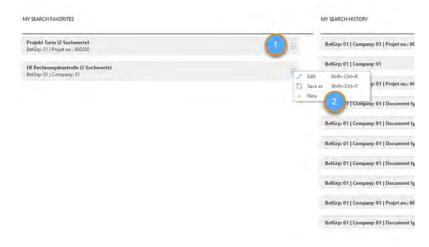
If you frequently run searches with identical search criteria, you can store search favorites.

This is mainly useful if you regularly view a particular customer/ project record. Or if you call up certain documents such as order confirmations or invoices on a daily basis.



To set up search favorites, proceed as follows:

**1.** Switch to the standard view by activating the *[Start]* button START" on page 11.



#### Fig. 53: Search favorites

- 1 [Search favorites] button
- 2 "Search favorites" settings
- **2.** Click on the [Search favorites] button.
- **3.** Now you have the option to administer the search favorites via the menu.
- The "Edit" menu item lets you edit the currently selected search favorite.
- The *"Replace"* menu item lets you replace the currently selected search favorite.
- With the "New" menu item, you can set up a new search favorite.

## Edit search favorites

|                                  | en la surre  | land to a |        |
|----------------------------------|--------------|-----------|--------|
| Caption                          | Field name   | Value     |        |
| <ul> <li>Projekt Turm</li> </ul> |              |           |        |
| Projekt Turm                     | BelGrp       | 01        |        |
| Projekt Turm                     | ProjNr       | 600200    |        |
| A EK Rechnungskontrolle          |              |           |        |
| EK Rechnungskontr                | elle BelGrp  | 01        |        |
| EK Rechnungskontr                | olle Firma   | 01        |        |
|                                  |              |           |        |
|                                  |              |           |        |
|                                  |              |           |        |
|                                  |              |           |        |
|                                  |              |           | 6      |
| Load Delete                      | Caption Edit |           | Cancel |

## Fig. 54: Edit search favorites

- Search favorites 1
- 2 3
- [Load] button [Delete] button [Caption] button [Edit] button [Cancel] button 4
- . 5 6

| Caption          | Function  |
|------------------|---|
| [Load] button    | When this button is activated, the current set-<br>tings are used.  |
| [Delete] button  | When this button is activated, the selected search parameter is deleted.  |
| [Caption] button | With this button you can change the caption of the search parameter.  |
| [Edit] button    | Activating this button allows you to change the value of the search parameter.  |
|                  | In the editing area, you can replace fixed<br>values with variable values. This function is<br>very useful for e.g. date fields. It lets you dis-<br>play a particular data range starting from the<br>current day. |
| [Cancel] button  | When this button is activated, the editing is canceled.   |



## **Replace search favorites**

| Caption                                   | Field name | Value  |        |
|---|------------|--------|--------|
| Projekt Turm                              |            |        |        |
| Projekt Turm                              | BelGrp     | 01     |        |
| Projekt Turm                              | ProjNr     | 600200 |        |
| <ul> <li>EK Rechnungskontrolle</li> </ul> |            | 1      |        |
| EK Rechnungskontrolle                     | BelGrp     | 01     |        |
| EK Rechnungskontrolle                     | Firma      | 01     |        |
|   |            |        |        |
| 2   |            |        | 3      |
| 2<br>Save                                 |            |        | Gancel |

Fig. 55: Replace search favorites

- Search favorites 1
- [Save] button [Cancel] button 2
- 3

| Caption         | Function   |
|-----------------|--|
| [Save] button   | When this button is activated, the current search favorite is saved.   |
| [Cancel] button | When this button is activated, the current selection of search criteria for the selected search favorite is saved with new criteria. The existing search favorite is replaced. |

## **Create search favorite**

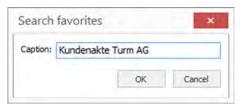
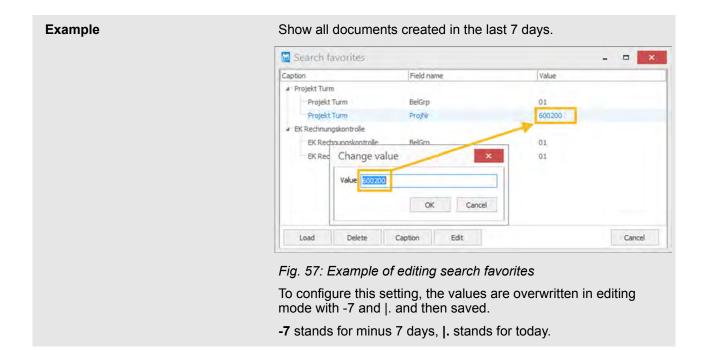


Fig. 56: Create search favorite

Finally, enter the name of the **search favorite** that you require. The search result of the current search is saved as a new favorite.





# 3.5 Search history

| IV SEARCH FAVORITES   |   |
|---|---|
| Project Turm (2 search values)<br>BelGrp: 01   ProjNe: 600200                               | 9 |
| Accounting debitor sheet (3 search values)<br>BelGrp: 01   Company: 02   Document type: 310 |   |

Fig. 58: Search history

The search history shows the most recently performed search criteria. You can retrieve the hitlist for the respective searches with a click.

The most recently performed searches are listed chronologically in ascending order from top to bottom.

# 3.6 HABEL SYNONYM

To search for terms that are synonymous with each other, you can use the *"synonym search (separate module)"*.

| $\bigcirc$ |  |
|------------|--|
|            |  |
|            |  |

You or the administrator need to provide a table for HABEL listing which terms count as synonyms. You can, for example, store the names of one or more terms in different languages.

The fields in which the synonym search is to be active are predefined and stored. The example below was created with the fields *"Full text"* or *"Content"*:

Enter the searched term in the "Content" and/or "Full text" fields.

A search for the term or for the term assigned in the table (in this case margarine and butter) will be run in the background in full text (*"HABEL FULLTEXT"* module required).

The result is highlighted in the document.



| Suche Trefferliste Anze                     |   | Irefferliste - Standardtrefferliste Recherche - J   | HABEL  |
|---|---|---|--|
| Druste perchem info<br>kodem.<br>Funktionen | B% Senden :<br>→<br>→<br>→<br>→<br>→<br>→<br>→<br>→<br>→<br>→   | P Verkleinern     P Vergrottern     Vergr | ~  |
| Vorschau                                    |   |   | <b>= 8</b> >   |
|   | Knäcke, Zwiebsck  | Scheibe (D.g. Trinkmilch 1,5% Fett  | Glas 200 g   |
|   | Brotbelag •   | Buttermilch   | Tasse 150 g  |
|   | colored and a weathing of the second s | Teeloffel 5 g   | Taske 150 g  |
|   | Butter<br>Mengerine   | Teeloffei 5 g   | Portion 100 g  |
|   | Mangerine help/ett  | Teeloffel 5 g Joghurt mit Frührten<br>S.S.94 Feit   | Becher 150 g   |
|   | Wurst   | Portion 25 g  | Becher 150 g   |
|   | Wurst fettreduziert   | Portien 25 g Pröchten 1,5 % Fett  | Becher 150 g   |
| en:   | Sqissufschnitt  | Portion 30 g  | A REAL PROPERTY AND A REAL |
| erall mit hin.                              | Vegetarische Pasteten   | Tesioffel T g   | isch   |
| se, Bonbons                                 | Frischkäse  | Toplattol 1 g Kotelett. Scrnitzel   | Pertion 125 g  |
| 1 Sie während<br>auch nicht                 | Køse unter 20% Fett   | Portion 30 g Steau, Schnitzel netur   | Portion 125 g  |
| agen men                                    | Kizse 20-40% Fett   | Portion 30 g Puterischnitzel  | SLUCK 125 g  |
| angegebene                                  | Kese über 40% Fett  | Portion 30 g Braten   | Portion 125 g  |
| e die Menne                                 | Mermelada. Gelea  | Teelaffel IQ g Gulasch, Ragout  | Portion 125 g  |
| ir die Menge,                               | Honig   | Teelottel to g Brstwurst  | Stock 150 g  |
| hicht.                                      | NuSneugatoreme  | Portice 20 g Worstchan,<br>Bookwurst, Wiener  | Stock 125 g  |
| r Woche an.                                 | Megerouerk:   | Essioffel 30 g Würstchan  |  |

Fig. 59: Synonym search

A synonym search can be performed without a full text search. In this case, the search is run in the defined database fields for which a synonym table is also stored. After entering the search term, the system checks whether the field content applies to this term or to the stored synonym terms. The search result is displayed as a hit in the hitlist. The terms are not highlighted.

In the example, the term "WORM" was searched for in the Article name field. "UDO" was also stored for this term in the synonym table. The result shows hits for both terms.

| Belegart | Name Belegart          | Belegdatum | Artikel Nr | Artikelbezeichnung         |
|----------|------------------------|------------|------------|----------------------------|
| 0002     | VK Angebot             | 22.05.2009 | 10099      | WORM-Platte Plasmon 5,2 GB |
| 0005     | VK Auftragsbestätigung | 27.05.2009 | 10099      | WORM-Platte Plasmon 5,2 GB |
| 0009     | VK Rechnung            | 05.06.2009 | 10099      | WORM-Platte Plasmon 5,2 GB |
| 0002     | VK Angebot             | 23.05.2009 | 10099      | WORM-Platte Plasmon 5,2 GB |
| 0005     | VK Auftragsbestätigung | 27.05.2009 | 10099      | WORM-Platte Plasmon 5,2 GB |
| 0001     | VK Anfrage             | 22.05.2009 | 10099      | WORM-Platte Plasmon        |
| 0004     | VK Bestellung          | 26.05,2009 | 10099      | WORM-Platte Plasmon        |
| 0007     | VK Lieferschein        | 29.05.2009 | 10099      | WORM-Platte Plasmon        |
| 0007     | VK Lieferschein        | 02.06,2009 | 10099      | WORM-Platte Plasmon        |
| 0012     | EK Anfrage             | 28.06.2009 | 10797      | Plasmon UDO-Laufwerk       |
| 0014     | EK Bestellung          | 02.07.2009 | 10797      | Plasmon UDO-Laufwerk       |
| 0012     | EK Anfrage             | 29.06.2009 | 10796      | UDO-Jukepox Plasmon        |
| 0014     | EK Bestellung          | 03.07.2009 | 10796      | UDO-Jukepox Plasmon        |
| 0013     | EK Angebot             | 01.07.2009 | 10796      | UDO-Jukepox Plasmon G24-1  |
| 0015     | EK Auftragsbestätigung | 08.07,2009 | 10796      | UDO-Jukepox Plasmon G24-1  |
| 0017     | EK Lieferschein        | 14.07.2009 | 10796      | UDO-Jukepox Plasmon G24-1  |



# 3.7 HABEL CONNECTION and HABEL CONNECTION plus

You can also start the document search in other applications. To do this, you need the *"HABEL CONNECTION"* module (result displayed in HABEL) or the *"HABEL CONNECTION plus"* module (result displayed in another application).

In your external application, you will see a button or function button that starts access to HABEL.

When the program starts, criteria to be used for the search are transferred to HABEL. In the background, these criteria are entered in the defined fields in the search screen and the search is started.

**HABEL CONNECTION** You will see the hitlist or the first hit that matches the search criteria displayed in the *"HABEL RETRIEVAL"*.

# **HABEL CONNECTION plus** With this version, display is in the external application and the *"HABEL RETRIEVAL"* itself is not opened. The first hit that matches the search criteria is provided as a document.



# 4 The hitlist

Hitlist

The hits for the entered search terms are displayed in the *"hitlist"*. This is structured as follows:

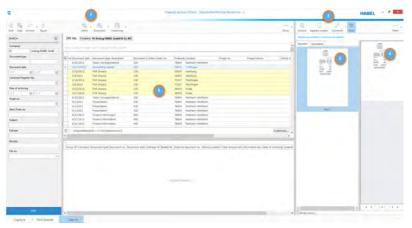


Fig. 60: Hitlist

- 1 Multifunction bar for the hitlist
- 2 Document preview
- 3 Multifunction bar for the document preview
- 4 "Document" display
- 5 Hitlist (can be set according to individual needs)

The **column heading** of the **hitlist** displays the respective **search criteria** in the same way as in the retrieval mask.

The **columns** display the **value** that was entered with the document as a search term during the archiving procedure. To go from one hit to the next, you can use the up/down arrow keys or click directly in the fields/rows.

The **currently selected procedure** is shown with a gray background. The whole row is always selected.

# 4.1 Command bar — Hitlist



Fig. 61: Command bar—Hitlist



# 4.1.1 Hitlist

# Hitlist

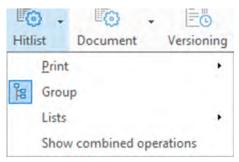


Fig. 62: Hitlist menu

| "Hitlist → Print<br>→ Preview"                                 | You can call up a preview of the printout first in order to make various adjustments to edges, page breaks etc.   |
|--|---|
| "Hitlist → Print<br>→ Save as HTML"                            | Alternatively, you can also save the hitlist in HTML format.  |
| "Hitlist → Print<br>→ Page layout<br>→ Define"                 | There are various print styles available, and you can also add your own.  |
| "Hitlist ➔ Group"  | Activates or deactivates the grouping of the hitlist & <i>Chapter 4.2.3 "Group"</i> on page 62.   |
| "Hitlist → Lists<br>→ Selection"                               | A window with the saved hitlists opens.<br>The hitlists can be deleted here.  |
|  | In the retrieval header you can see which hitlist is active.  |
| "Hitlist → Lists<br>→ Save"                                    | If you make changes to your <i>"own"</i> hitlists, you can apply these with the Save command.   |
|  | The standard hitlist cannot be changed.   |
| "Hitlist → Lists<br>→ Save as new                              | Current hitlist settings can be saved as new settings.  |
| setting"   | After selecting this menu item, you will be asked to enter a name for the new setting.  |
| "Hitlist → Lists<br>→ Save as<br>standard"                     | If you make changes to your <i>"own"</i> hitlists, you can apply these with the <i>"Save"</i> command.  |
| "Hitlist → Lists<br>→ Save under<br>document type"             | If you have started a search with entry of<br>document types, you can also save the<br>settings on a document type-dependent<br>basis without having to create your own<br>hitlist. As an administrator, you can also<br>save this setting globally for all users. The<br>document type-dependent hitlist is then<br>used automatically for every search carried<br>out with the defined document type. This<br>can be deleted again in the menu. |
| "Hitlist → Lists<br>→ Save under<br>document type<br>(global)" | The settings for this document type are<br>saved globally here, i.e. the settings for<br>this type of document will be the same for<br>all users.   |
|  |   |

| "Hitlist → Lists<br>→ Delete document<br>type setting" | Settings dependent on the document types are deleted here.  |
|--|---|
| "Hitlist<br>→ View process<br>chains"                  | When this is activated or deactivated, the process chain is displayed or hidden<br>Chapter 4.3.1 "Process chains" on page 72. |

# 4.1.2 Document

Document

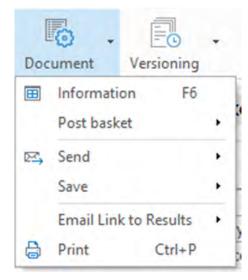


Fig. 63: Document menu

| "Document<br>→ Information"When this is activated, the document information is opened & Chapter 6 "Document<br>information" on page 83."Document<br>→ Post basket<br>→ Generate entry"A post basket entry is generated upon activation."Document<br>→ Post basket<br>→ View history"& "Post basket" on page 68"Document<br>→ Post basket<br>→ View history"& "Post basket" on page 68"Document<br>→ Send as<br>attachment"The current document is sent as an attachment (in original format). & "More information about sending" on page 60"Document → Send<br>→ Send as PDF"The current document is sent as a PDF file<br>& "More information about sending" on page 60."Document → Save<br>→ Save as<br>attachment"The current document is saved as an<br>attachment (in original format)."Document → Save<br>→ Save as<br>attachment"The current document is saved as an<br>attachment (in original format)."Document → Save<br>→ Save as PDF"The current document is saved as a PDF<br>file."Document → Save<br>→ Save as PDF"Fe-mail link to procedure" on page 59<br>file."Document → Print"Prints the currently open document. |  |   |
|---|--|---|
| → Post basket<br>→ Generate entry"vation."Document<br>→ Post basket<br>→ View history"% "Post basket" on page 68"Document → Send<br>→ Send as<br>attachment"The current document is sent as an attach-<br>ment (in original format). % "More informa-<br>tion about sending" on page 60"Document → Send<br>→ Send as PDF"The current document is sent as a PDF file<br>% "More information about sending"<br>on page 60."Document → Save<br>→ Save as<br>attachment"The current document is saved as an<br>attachment (in original format)."Document → Save<br>→ Save as<br>attachment"The current document is saved as an<br>attachment (in original format)."Document → Save<br>→ Save as PDF"The current document is saved as a PDF<br>file."Document → Save<br>→ Save as PDF"Fe-mail link to procedure" on page 59"Document<br>→ Send link to<br>procedure"% "E-mail link to procedure" on page 59  |  | mation is opened & Chapter 6 "Document      |
| <ul> <li>→ Post basket</li> <li>→ View history"</li> <li>"Document → Send<br/>→ Send as<br/>attachment"</li> <li>The current document is sent as an attachment (in original format). &amp; "More informa-<br/>tion about sending" on page 60</li> <li>"Document → Send<br/>→ Send as PDF"</li> <li>The current document is sent as a PDF file<br/>&amp; "More information about sending"<br/>on page 60.</li> <li>"Document → Save<br/>→ Save as<br/>attachment"</li> <li>The current document is saved as an<br/>attachment (in original format).</li> <li>"Document → Save<br/>→ Save as PDF"</li> <li>The current document is saved as a PDF<br/>file.</li> <li>"Document → Save<br/>→ Save as PDF"</li> <li>"E-mail link to<br/>results<br/>→ Send link to<br/>procedure"</li> </ul>  | ➔ Post basket  |   |
| → Send as<br>attachment"ment (in original format).<br>tion about sending" on page 60"Document → Send<br>→ Send as PDF"The current document is sent as a PDF file<br>& "More information about sending"<br>on page 60."Document → Save<br>→ Save as<br>attachment"The current document is saved as an<br>attachment (in original format)."Document → Save<br>→ Save as<br>attachment"The current document is saved as an<br>attachment (in original format)."Document → Save<br>→ Save as PDF"The current document is saved as a PDF<br>file."Document → Save<br>→ Save as PDF"Fe current document is saved as a PDF<br>file."Document<br>→ Save as PDF"% "E-mail link to procedure" on page 59<br>or procedure"   | ➔ Post basket  | 🌣 "Post basket" on page 68                  |
| <ul> <li>→ Send as PDF"</li> <li>♦ "More information about sending"<br/>on page 60.</li> <li>*Document → Save<br/>→ Save as<br/>attachment"</li> <li>*Document → Save<br/>→ Save as PDF"</li> <li>*Document → Save<br/>→ Save as PDF"</li> <li>*The current document is saved as a PDF<br/>file.</li> <li>*Document<br/>→ E-mail link to<br/>results<br/>→ Send link to<br/>procedure"</li> </ul>   | → Send as  | ment (in original format). 😓 "More informa- |
| → Save as<br>attachment"attachment (in original format)."Document → Save<br>→ Save as PDF"The current document is saved as a PDF<br>file."Document<br>→ E-mail link to<br>results<br>→ Send link to<br>procedure"% "E-mail link to procedure" on page 59  |  | "More information about sending"            |
| <ul> <li>→ Save as PDF" file.</li> <li>*Document</li> <li>→ E-mail link to results</li> <li>→ Send link to procedure"</li> </ul>  | → Save as  |   |
| <ul> <li>→ E-mail link to<br/>results</li> <li>→ Send link to<br/>procedure"</li> </ul>   |  |   |
| "Document $\rightarrow$ Print" Prints the currently open document.  | <ul> <li>→ E-mail link to results</li> <li>→ Send link to</li> </ul> | ∜ "E-mail link to procedure" on page 59     |
|   | "Document → Print"   | Prints the currently open document.         |

# E-mail link to procedure

- 1. To send a link to a procedure or document, mark the respective hit.
- **2.** Click on "Document  $\rightarrow$  E-mail link to results → Send link to procedure".





When you click on *"Send link to procedure"*, the recipient only receives a link with a very small file size. This link refers to the document (document view) and/or the procedure (hitlist) in the archive. The recipient can go there directly by clicking on the link.

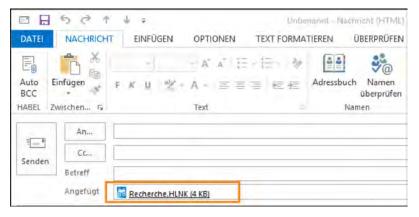


Fig. 64: E-mail link to procedure

**More information about sending** To send as PDF, the corresponding additional licenses are required. When you send as PDF, the hits that you want to send are automatically converted to a PDF file, provided these are TIFF documents and/or provided these were automatically converted to TIFF documents (in Word, Excel etc.).

To send an e-mail, start in the area "Document  $\rightarrow$  Send". You can then choose from the following commands:

- Send as attachment
- Send as PDF

| Send as attach-<br>ment | - | Sends the displayed hit as an e-mail attachment.                    |
|-------------------------|---|---|
| Send as PDF             | - | Sends the displayed hit as an e-mail attach-<br>ment in PDF format. |

# 4.2 Hitlist settings

You can customize the hitlist. There are a number of ways to do this.



# 4.2.1 Saving documents with drag & drop

Saving documents with drag & drop

| General archive. (Hitrist - Standanstreffellista Rosterstre - )  |            | HABEL  |              |
|--|------------|--|--------------|
| 16 . 18 . A .<br>Mina Decement Westerny  | tin<br>tim | Detect Separate Connect Name   | in .         |
| This Company Of Autous HABIT Grabit & Co. KG Prost Inc. 600200   |            | Disartent Associations   |              |
|  |            | A  |              |
|  |            | No. 110-   | (2)          |
| r: Dooi Dooi Oocument Sales Po(Locato)P + Project Article descripti, Subject   |            | E E  | City dataset |
| 2/28/233 Sales Itvo 2400C 60: Franklu 6003 Turm / Arbeitszeit Tech Aufzuge kompetit und exkluse<br>2/12/100 FUB Jegun 2600C 20E Henrbur 6002 Turm / Stahitur, Modell zu Prosekt Turm AG Ieo 600200 |            |  | City in PDF  |
| 2/12/ 3H3 Sales Offe 2908 60. Trankly 600 Turn / Aufzug estimate: Aufzuge Rungs - ma extense   |            | 1 22 - 275- 2  | Canal        |
| 3/12/200 Salex Jrg. 2900C 601 Frankly 6003 Turm / Aufzug kömpekt Anfrage zver Aufzüge  |            |  | Canval       |
| 2/17/ 215 Sales Ord-29900 60: Frenkfu 6000 Turm / Aufzug kompnit: Aufzüge kompnikt und exklusiv  |            | Bate -   |              |
| 1/17/ 235 Sales Invo 29000 60: Frankfu 6002 Turni / Taitzahlung Antahlungsrechnung 1   |            |  |              |
| 3/17) 230 Sales Deli 29001 60; Frankfu 600) Turm J Aufzug kompekt. Aufzüge kompekt und exiliusiv   |            |  |              |
| 2/12/108 PUR Input 29001 201 Hambu 6002 Turnt / Eletturgystem, F zu Projekt Turm AG to 600209  |            |  |              |
| To Take 1938 which have been any financial about Young 1 Taken have a second second more than  |            | and the second s |              |

Fig. 65: Saving with drag & drop

Alternatively, you can select the entry to be saved in the hitlist and drag it to a location of your choosing with drag & drop. In our example, as a PDF on the desktop. The procedure is saved there.

# 4.2.2 Edit hitlist columns

# Caption

| New caption       |       | ×      |
|-------------------|-------|--------|
| Text: Versioniert | ? (1) |        |
|                   | OK    | Cancel |

You can format the caption of the respective column here.

# Fig. 66: Caption for column

# Alignment

| lignment         | × |
|------------------|---|
| Alignment        |   |
| Flush left       |   |
| O Flush right    |   |
|                  |   |
| O Center on page |   |

Specify how the content of the column should be aligned.

Fig. 67: Column alignment of hitlist

# Merge cells

| Versioniert | Document date | Document | Document-type descriptio | Sales Orde |
|-------------|---------------|----------|--------------------------|------------|
|             | 2/12/2012     | 110      | PUR Order                | 290001     |
|             | 3/9/2012      | 130      | PUR Invoice              | 290001     |
|             | 3/5/2012      | 125      | PUR Delivery note        | 290001     |
|             | 3/13/2012     | 125      | PUR Delivery note        | 290001     |
|             | 2/28/2012     | 127      | PUR complaint            | 290001     |
|             | 3/7/2012      | 125      | PUR Delivery note        | 290001     |

When you merge cells, the hits with identical selected column contents will be merged. For example, when you merge the cells of the document date, then all cells in the hitlist with an identical document date are shown in a merged format.

## Fig. 68: Merge

Fit to width

You can adjust the width of the hitlist for optimum distribution of the columns across the available width.



| Versionic 🗸 | Document *** |                            | ent-type de    |
|-------------|--------------|----------------------------|----------------|
| FG          | 2/22/2012    | Caption                    | ols            |
| 6           | 2/20/2012    | Alignment                  | pls            |
|             | 2/28/2012    | Merge cells                | nvoice         |
|             | 2/12/2012    | Optimize column width      | quiry          |
|             | 2/12/2012    |                            | Offer          |
|             | 2/12/2012    | Optimize all column widths | nquiry         |
|             | 2/17/2012    | Fit width Ctrl+F2          | order confir   |
|             | 2/17/2012    | No sorting                 | nvoice         |
|             | 2/17/2012    | vin sine                   | andelivery not |
|             |              |                            |                |
| Docume      | ent date     | + ocument-type des         | scription      |
| 9/20/20     | 012          | Sales Corresponde          | ence           |

- 1. With the right mouse button, click on the column that you would like to adjust and click on "Fit to width".
- 2. By double-clicking on the end of a particular column, you can adjust the width of this column to fit the longest term in this hitlist. Make sure the cursor has changed to a cross.

You can adjust the width of all columns in the hitlist for optimum distribution of the columns across the available width.

With the right mouse button, click on the column that you would like to adjust and click on "Optimize all column" widths".

When you click on a column header, the hitlist is sorted according to the respective column in ascending or descending order. You can cancel the sorting with this menu.

# 4.2.3 Group

You can group the hitlist view. Grouping is saved even after the exiting the retrieval. To perform grouping, click the [Group] button. A new list appears into which you need to drag the column that you want to group.

The grouping can be activated or deactivated in the menu "Hitlist  $\rightarrow$  Group"  $\Leftrightarrow$  "Hitlist" on page 58.

| ocument type (1 + * here to pro- | p by Bial collines |                           |                 |          |                |          |            |                     |                  |
|----------------------------------|--------------------|---------------------------|-----------------|----------|----------------|----------|------------|---------------------|------------------|
| Versioniei Documiett type (1 *   | Document date A    | Document-type description | Sales Order no. | Fostcode | Location       | Projet n | Project Na | Article description | Subject          |
| 115                              | 2/15/2012          | PUR Order confirmation    | 290001          | 73207    | Plochingen     | 600200   | Turm AG    | Boden Parkett       |                  |
| 115                              | 2/15/2012          | PUR Order confirmation    | 290001          | 73207    | Plochingen     | 600200   | Turm AG    | Boden Teppich       |                  |
| 215                              | 2/17/2012          | Sales Order confirmation  | 290001          | 60308    | Frankfurt am M | 600200   | Turm AG    | Aufzug kompakt      | Aufzüge kompakt  |
| 230                              | 2/17/2012          | Sales Delivery note       | 290001          | 60308    | Frankfurt am M | 600200   | Turm AG    | Aufzug kompakt      | Aufzüge kompakt  |
| 235                              | 2/17/2012          | Sales Invoice             | 290001          | 60308    | Frankfurt am M | 600200   | Turm AG    | Teilzahlung         | Anzahlungsrechnu |

## Fig. 70: Group

The result of the grouping appears as follows:

Sales Correspondence Accounting receipt Fig. 69: Adjust columns Optimize all column widths

| 4/3/2014  | Caption                    | Correspon  |
|-----------|----------------------------|------------|
| 7/30/2013 | Alignment                  | ing        |
| 7/30/2013 | Merge cells                | ing        |
| 7/30/2013 |                            | ing        |
| 7/30/2013 | Optimize column width      | ing        |
| 7/30/2013 | Optimize all column widths | ing        |
| 7/30/2013 | Fit width Ctrl+F2          | ing        |
| 3/27/2012 | Al                         | ce documei |
| 3/17/2012 | No sorting                 | Invoice    |

#### **Cancel sorting**

10/17/2013



| Document type | v               |                           |                 |          |                |          |            |                     |
|---------------|-----------------|---------------------------|-----------------|----------|----------------|----------|------------|---------------------|
| Versioniert?  | Document date A | Document-type description | Sales Order no. | Postcode | Location       | Projet n | Project Na | Article description |
|               |                 | Order confirmation (3)    |                 | 1        | 1              |          |            |                     |
|               | 2/17/2012       | Sales Order confirmation  | 290001          | 60308    | Frankfurt am M | 600200   | Turm AG    | Aufzug kompakt      |
|               | 5/22/2012       | Sales Order confirmation  | 290011          | 04103    | Leipzig        | 600210   | City Hotel | Aufzug exklusiv     |
|               | 7/26/2012       | Sales Order confirmation  | 290031          | 10115    | Berlin         | 600230   | Hochaus Gr | Aufzug exklusiv     |

Fig. 71: Grouping according to document type

To expand or collapse the grouped entries, use the right mouse button to click in the context menu on *"Expand all"* or *"Collapse all"*. Or click on the bar above the column caption. The entries will be expanded or collapsed accordingly.

# 4.2.4 Fit width

| - | Document date | + Pocument | Document-type   |
|---|---------------|------------|-----------------|
|   | 2/12/2012     | 110        | PUR Order       |
|   | 3/9/2012      | 130        | PUR Invoice     |
|   | 3/5/2012      | 125        | PUR Delivery no |

The hitlist width can be adjusted to fit the window. This lets you optimally distribute the individual columns to the available width. By double-clicking on the end of a particular column, you can also adjust the width of this column to fit the longest term in this hitlist. For this action, the cursor changes to a cross.

# Fig. 72: Fit width

# 4.2.5 Adjust columns

| Document type                     |                              |  |          |              |
|-----------------------------------|------------------------------|--|----------|--------------|
| Versioniert? Document da          | te Document-type description | Projet no. Postcode  | Location | Project Name |
| Annotation Nr                     | Expense account              | 🗹 Projet no.   |          |              |
| Approval date 1                   | Expense account description  | PUR Blanket order no.  | pruburg  | Turm AG      |
| Approval date 2                   | External article no.         | PUR Delivery note no.  | emburg   | Turm AG      |
| Archival Time                     | External document no.        | <ul> <li>PUR Inquiry no.</li> <li>PUR Invoice/Credit note no.</li> </ul> | Ida      | Turm AG      |
| Article description               | File nó.                     | PUR protection put note no.  | ida      | Turm AG      |
| Attachemen                        | Formular                     | Ouantity   | pchingen | Turm AG      |
| Attachem at Counter               | gross amount                 | RwAbmKz  |          |              |
| Barcod                            | HABEL Pos. ID                | Sales Blanked order no.  | ochingen | Turm AG      |
| Batch , io.                       | HABEL Pos. SN                | Sales Delivery note no.  |          |              |
| Cle rance 1                       | information box              | Sales Invoice/Credit note no.  | ochingen | Turm AG      |
| C ₂arance 2                       | Invoice existing?            | Sales Offer no.  | Ada      | Turm AG      |
| Jearance Employee 1               | Kunden-/Lieferanten Nr.      | Sales Order no.  | ochingen | Turm AG      |
| Clearance Employee 2              | Location                     | Scan/Cold  | amburg   | Turm AG      |
| Company                           | Loginname                    | Serial no.   | emburg   | Turm AG      |
| Complaint no.                     | Managed<br>Master ID         | Single price   |          |              |
| Conversion-Flag                   | Mehrwertsteuer 8%            | Sub Document Type  | lida     | Turm AG      |
| Cost center account               | Message Attachement ID       | Subject  | ochingen | Turm AG      |
| Country code                      | Message ID                   | Subsidiary   |          |              |
| Currency code                     | Net amount                   | Terms of payment   | prudme   | Turm AG      |
| Customer/Supplier Name            | OCR                          | Total Cost   | amburg   | Turm AG      |
| Date of archiving                 | Offer existing?              | Total pages  | ida      | Turm AG      |
| Delivery note existing?           | Order confirmation existing  | Value added tax  | Ida      | Turm AG      |
| <ul> <li>Document date</li> </ul> | Order existing?              | Value added tax 0%   |          |              |
| Document no.                      | Orginaldateiname             | Value added tax 19%  | ochingen | Turm AG      |
| Document Rotation                 | Originaldateipfad            | Version Outdated   | ochingen | Turm AG      |
| Document type                     | Page No.                     | Versioniert?   |          |              |
| Document-type description (1)     | Pagecount                    | Wormnummer   | proburg  | Turm AG      |
| Drawing descritption              | ✓ Postcode                   |  | emburg   | Turm AG      |
| Drawing No.                       | Project Name                 | 444844   | Filleng  | 7-10         |

Fig. 73: Column selection

You can also show or hide columns in the hitlist by clicking on the column selection.

# Change column order

| - |    | rsioniert? Projet no. Int date | Document-type description A | Projet no. | Postcode |
|---|----|--------------------------------|-----------------------------|------------|----------|
| • | .4 | Document type 100 PUR Inquir   | y (6)                       |            |          |
|   |    | (12/2012                       | PUR Inquiry                 | 6002 10    | 20095    |
|   |    | 2/2012                         | PUR Inquiry                 | 6002 0     | 20095    |
|   |    | 2/12/2012                      | PUR Inquiry                 | 6002 10    | 36043    |
|   |    | 2/12/2012                      | PUR Inquiry                 | 6002 10    | 36043    |
|   |    | 2/12/2012                      | PUR Inquiry                 | 600200     | 73207    |
|   |    | 2/12/2012                      | PUR Inquiry                 | 600200     | 73207    |
|   | .4 | Document type : 105 PUR Offer  | (7)                         |            |          |
|   |    | 2/13/2012                      | PUR Offer                   | 600200     | 73207    |
|   |    | 2/15/2012                      | PUR Offer                   | 600200     | 36043    |
|   |    | 2/13/2012                      | PUR Offer                   | 600200     | 73207    |

# Fig. 74: Change column order

To change the order of the columns, move them from left to right or from right to left.

You can also access the column selection and the other column functions by right-clicking on the column heading:

| Caption                    | You can customize the caption of the column by entering new text.  |
|----------------------------|--|
| Alignment                  | The field content in the hitlist can be left-<br>aligned, right-aligned or centered. This set-<br>ting is user-specific. |
| Merge cells                | This command merges cells that have the same content within a column to provide a better overview.                       |
| Fit to width               | Use this command to set the column view to the optimum width.  |
| Optimize all column widths | Use this command to set all column views to the optimum width.   |
| Cancel sorting             | Here you can cancel the sorting of the col-<br>umns.   |

## Use column context menu

| Be | elegart | Bezeichnung                    |
|----|---------|--------------------------------|
|    |         | Ausrichtung                    |
| 1  | Versior | 7-11                           |
| ۶  | Bel     | Zellen zusammenfassen          |
|    | Bel     | Optimale Breite                |
|    | ▶ Bel   | Alle Spaltenbreiten optimieren |
|    | Bele    |                                |
|    | Bel     | Sortierung aufheben            |

Fig. 75: Column context menu



#### Filter columns

| Pac   | imont date      | Document-bine deccrinti    | 9  |   |
|-------|-----------------|----------------------------|----|---|
| An    | error occured   | while applying the changes | -  | ľ |
| (Cu   | istom)          |                            |    |   |
| Acc   | counting receip | pt                         |    |   |
| Cer   | tificates       |                            |    |   |
| Dra   | wing            |                            |    |   |
| Pro   | ject document   | ts                         |    | 1 |
| Pro   | tocols          |                            |    | ( |
| PUP   | R complaint     |                            |    | ( |
| PUP   | R Correespond   | lence                      | 16 | ( |
| PUP   | R Delivery note | 9                          |    | 1 |
| D PUP | R Inquiry       |                            |    |   |
| PUP   | R Invoice       |                            |    | ľ |
| PUP   | R Offer         |                            |    |   |
| PUP   | R Order         |                            |    |   |
| PUP   | R Order confirm | mation                     | ~  |   |

You will see a filter as soon as you move the mouse over the arrow symbol of a column. A blue filter symbol shows you that the filter is active.

Click on the arrow. The **filter selection** opens.

hitlist. ఈ ""Settings → Hitlist"" on page 29

Select the required term(s). The filter is active immediately. The display of the documents is reduced according to the **selected filter criteria**.

The hitlist offers a wide selection of filter options, provided that you have defined in the general settings that the filter is active for the



#### Modify filter settings

#### 🖹 🕑 ((Document-type description (1) = Accounting receipt) or (Document-type description (1) = Certificates) or (Document-type description (1) = Drawing) or (1 🥂 Customize...

#### Fig. 77: Status line — customize filter criteria

You can also see the selected filter in the status line. The filter settings can be changed with the *[Customize]* button.

| ilter | AND | <root></root>   |  |
|-------|-----|---|--|
|       | OR  | OR  |  |
|       |     | Document-type description (1) equals Accounting receipt |  |
|       |     | Document-type description (1) equals Certificates       |  |
| ł     | *** | Document-type description (1) equals Drawing            |  |
|       |     | Document-type description (1) equals Project documents  |  |
|       | -   |   |  |
|       |     |   |  |

Fig. 78: Modify filter settings

A window opens in which you can set various filter options such as restriction to particular gross amounts. You can also save your customized filter profile here.



# 4.2.6 Sort

| 7 | Versior | Document | Documer | Document-type description (1) | ^ | Sales Orc | Postc |
|---|---------|----------|---------|-------------------------------|---|-----------|-------|
| - |         |          | 425     | Certificates                  |   |           | 20093 |
|   |         |          | 425     | Certificates                  |   |           | 60308 |
|   |         |          | 425     | Certificates                  |   |           | 6030  |
|   |         |          | 425     | Certificates                  |   |           | 2009  |
|   |         |          | 425     | Certificates                  |   |           | 7320  |

## Fig. 79: Sort documents

You can sort in ascending or descending order by clicking on the relevant column. The **arrow** shows the sorting direction.

If you want to sort multiple columns, click on these in succession while *[holding down the Shift key]*. The **number** in the display shows you which is the first sorting criterion and which are the subsequent ones.

#### 

By pressing the *[Ctrl]* key, you can cancel the sorting with a click on the respective column.

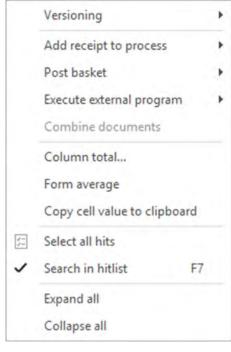
# 4.2.7 Save hitlist settings

Changes to the hitlist view remain active until you exit the retrieval. If you want to retain the change beyond this, you need to save new settings. You can do this in the *"Hitlist tab by selecting the Settings group"* and then the *[Hitlist]* button, under which you will see further menu sub-items § *"Hitlist" on page 58*.



# 4.3 Hitlist

## Context "right mouse button"



When you click on a hit with the right mouse button, the context menu appears.

Fig. 80: Hitlist context menu

#### Versioning

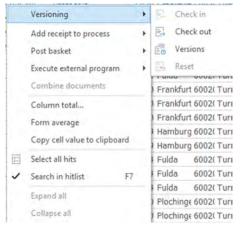


Fig. 81: Versioning context

| Caption   | Description                               |
|-----------|---|
| Check in  | Schapter 3.2.2 "Versioning"<br>on page 21 |
| Check out | Schapter 3.2.2 "Versioning"<br>on page 21 |
| Versions  | Schapter 3.2.2 "Versioning"<br>on page 21 |
| Reset     | Schapter 3.2.2 "Versioning"<br>on page 21 |



#### Post basket

| Sender:    | Schmitt, Mike   |   |
|------------|---|---|
| Becipient: | Abele, Martin<br>Auer, Franz<br>Banzhal, Sandra                   | î |
|            | Buildhe Mau<br>Demo, User<br>Dige: Oska<br>Eisermann, Heike<br>FK | ~ |
| Message:   | Please check  | Y |
| Do by:     | 15.01.2018 🗸 10.21:05 😭   |   |

Fig. 82: Create post basket entry

To create a new post basket entry from the retrieval: Further information can be found in the Post Basket User Manual.

| 6002( Turm A R8 exklusiv, Stahlf   |                                   |                  |     |              |
|------------------------------------|-----------------------------------|------------------|-----|--------------|
| 6002( Turm A R1 kompakt, Stahl     | Versioning                        |                  | 1   |              |
| 6002( Turm A Aufzug kompakt Au     | Add receipt t                     | to process       | >   |              |
| 6002( Turm A Teilzahlung Ar        | Post basket                       |                  |     | Create entry |
| 6002( Turm A Aufzug kompakt Au     | Eucrista estas                    | rnal program     |     | Show history |
| 6002( Turm A Stahltür, Modell H zu |                                   |                  |     | Show history |
| 6002( Turm A Glastürsystem, Mo zu  | Combine do                        | cuments          |     |              |
| 6002( Turm A 3 + 2 ANC Motor       | Column tota                       | al               |     |              |
| 6002( Turm A R1 kompakt, Stahl     | Form averag                       | P                |     |              |
| 6002( Turm A R8 exklusiv, Stahlf   |                                   |                  |     |              |
| 6002( Turm A Boden Parkett         | Copy cell val                     | lue to clipboard | -   |              |
| 6002( Turm A Boden Teppich         | Select all hits                   | 5                |     |              |
| 6002( Turm A R8 exklusiv, Stahlf   | <ul> <li>Search in hit</li> </ul> | list F7          |     |              |
| 6002( Turm A Boden Parkett         | E                                 |                  | - 1 |              |
| 6002( Turm A Boden Teppich         | Expand all                        |                  |     |              |

#### Fig. 83: View history

If you use the *"HABEL POST BASKET"* module, two additional functions are available in the document view. *"Show history"* displays the history of the document in the post basket. This lets you see the route the document has taken through the company.

Via the context, use the right mouse button to select *"Post basket* → View history".



Fig. 84: History

Execute external program

You can also access external programs from the hitlist in HABEL.

- **1.** To do this, right-click on a hit. A context menu opens with the command *"Execute external program"*. For this function, you need to have HABEL SCRIPT for Retrieval.
  - ⇒ Depending on the definition, you have various options for executing other programs.

These include, for example, starting a new search in HABEL.

**2.** Right-click on any value within the hitlist to open the context menu. This value is used for the new search in HABEL.



| 7 | Document type description   | Sales O | rder i | no. Document typ         | pe D  | ocume | ent date | Postcode                      | Location         | Projet |  |  |
|---|-----------------------------|---------|--------|--------------------------|-------|-------|----------|-------------------------------|------------------|--------|--|--|
|   | Product information         | 290001  |        | 400                      | 2/    | 14/20 | 09       | 60308                         | Frankfurt am M   | 1      |  |  |
|   | Product information         | 290001  |        | 400                      | 2/    | 14/20 | 09       | 60308                         | Frankfurt am M   | 1      |  |  |
|   | Product information         | 290001  |        | 400                      | 2/    | 14/20 | 09       | 60308                         | Frankfurt am M   | 1      |  |  |
| ۲ | Sales Correspondence        | 290001  |        |                          | 2     | 14/20 | 09       | 60308                         | Frankfurt am M   | 1      |  |  |
|   | Sales Correspondence        | 290001  |        | Versioning               |       |       | 09       | 60308                         | Frankfurt am N   | 1      |  |  |
|   | Product information         | 290001  |        | Add ceipt to process     |       |       | 09       | 60308                         | Frankfurt am M   | 1      |  |  |
|   | Sales Correspondence        | 290001  |        | Start workfie            |       |       | 09       | 60308                         | Frankfurt am N   | 1      |  |  |
|   | Product information         | 290001  |        |                          |       |       | 09       | 60308                         | Frankfurt am M   | 1      |  |  |
|   | Sales Correspondence        | 290001  |        | Post basket              |       | +     | 09       | 60308                         | Frankfurt am N   | 1      |  |  |
|   | Sales Invoice               | 290001  |        | Execute external progra  | am    | -     | 5        | how docur                     | ment in Navision |        |  |  |
|   | Sales Correspondence 290001 |         |        | Combine documents        |       |       |          | Start new search in HABEL DMS |                  |        |  |  |
|   | Product information         | 290001  |        | Ch                       |       | -     | .9       | 00300                         | FIGHNUIT OIL P   | _      |  |  |
|   | Sales Correspondence        | 290001  |        | Change fields            |       |       | 09       | 60308                         | Frankfurt am M   | 1      |  |  |
|   | Product information         | 290001  |        | Column total             |       |       | 09       | 60308                         | Frankfurt am M   | 1      |  |  |
|   | Product information         | 290001  |        | Form average             |       |       | 09       | 60308                         | Frankfurt am M   | 4      |  |  |
|   | Product information         | 290001  |        | Copy cell value to clipt | hoard |       | 09       | 60308                         | Frankfurt am N   | 1      |  |  |
|   | Product information         | 290001  |        |                          | boan  |       | 09       | 60308                         | Frankfurt am M   | 1      |  |  |
|   | Product information         | 290001  |        | Select all hits          |       |       | 09       | 60308                         | Frankfurt am M   | 1      |  |  |
|   | Sales Correspondence        | 290001  | ~      | Search in hitlist        | 1     | 7     | 09       | 60308                         | Frankfurt am M   | 1      |  |  |
|   | Sales Correspondence        | 290001  |        | Expand all               |       |       | 09       | 60308                         | Frankfurt am N   | 1      |  |  |
|   | Product information         | 290001  |        |                          |       |       | 09       | 60308                         | Frankfurt am M   | 4      |  |  |
|   | Product information         | 290001  |        | Collapse all             |       |       | 09       | 60308                         | Frankfurt am M   | 1      |  |  |

## Fig. 85: New search in HABEL

In our example, we clicked on the *"order number"*. This is now used as the criterion for a new search in HABEL. It is also possible to use the command *"Execute external program"* to start the separate module *"HABEL SEARCH and REPLACE"*.

In this case, a search with associated replace operation is performed for all the procedures which have the selected value.

External programs such as an ERP or financial accounting program can also be executed using this command.

A combination of the hits is created *Chapter 4.3.1 "Process chains" on page 72.* 

You can calculate the total values for columns, for example the total of all invoices for a particular period.

- **1.** To do this, search all invoices for the specified period and highlight all rows (*[Ctrl]* + *[A]*).
- **2.** Then right-click in the *"Amount"* column and select the command *"Column total"*. The total is displayed for the selected rows.

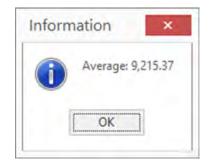
| Combine | documents |  |
|---------|-----------|--|
|         |           |  |

Column total and Form average

| Inform | nation      | ×       |
|--------|-------------|---------|
| 1      | Column sum: | 188.560 |
|        | OK          |         |

Fig. 86: Column total





**3.** Do the same to generate an average for for the selected rows in a particular column.

Fig. 87: Form average

Copy cell value to clipboard

Select all hits

The value of the cell being clicked on is copied to the clipboard of the operating system.

All hits in the hitlist are marked. The following actions are performed for all marked hits.



## Search in hitlist

| 2        | Ve | rsioniert?                                  | Document date                            | Doc            | ume   | ent-type description (1)     | ~      | Sales Order no |  |  |  |  |
|----------|----|---|--|----------------|---|------------------------------|--------|----------------|--|--|--|--|
|          | .4 | Document type : 100 PUR Inquiry (Anzahl=07) |  |                |   |                              |        |                |  |  |  |  |
| <b>b</b> |    | 2/12/2012                                   |  | PUP            | R Inc   |                              | 290001 |                |  |  |  |  |
|          |    | 2/12/2012<br>1/19/2018                      |  | PU<br>PU<br>PU |   |                              | 290001 |                |  |  |  |  |
|          |    |   |  |                |   | vesioning                    |        | 290001         |  |  |  |  |
|          |    |   | 2/12/2012                                | PU             |   | Add receipt to process       |        | 290001         |  |  |  |  |
|          |    |   | 2/12/2012                                | PU             | PU Post basket<br>PU Execute external program | +                            | 290001 |                |  |  |  |  |
|          |    |   | 2/12/2012                                | PU             |   | Execute external program     |        | 290001         |  |  |  |  |
|          |    |   | 2/12/2012                                | PU             |   |                              |        | 290001         |  |  |  |  |
|          |    | Document type : 105 PUR Offer (Anzahl=07)   |  |                |   | Combine documents            |        |                |  |  |  |  |
|          |    |   | 2/13/2012                                | PU             |   | Column total                 |        | 290001         |  |  |  |  |
|          |    |   | 2/15/2012                                | PU             |   | Form average                 |        | 290001         |  |  |  |  |
|          |    |   | 2/13/2012                                | PU             |   | Copy cell value to clipboard |        | 290001         |  |  |  |  |
|          |    |   | 2/12/2012                                | PU             |   |                              |        | 290001         |  |  |  |  |
| -        |    |   | 2/12/2012                                | PU             | 1   | Select all hits              | _      | 290001         |  |  |  |  |
|          |    |   | 2/15/2012                                | PI             | ~   | Search in hitlist F7         |        | 290001         |  |  |  |  |
|          |    |   | 2/14/2012                                | PU             |   | Expand all                   |        | 290001         |  |  |  |  |
|          | 4  | Document type                               | Document type : 110 PUR Order (Anzahl=06 |                |   |                              |        |                |  |  |  |  |
|          |    |   | 2/12/2012                                | PU             |   | Collapse all                 |        | 290001         |  |  |  |  |

## Fig. 88: Search in hitlist

**1.** To search for the content of database fields directly in the hitlist in order to get to the desired result, use the right mouse button to click on the hitlist and then on *"Search in hitlist"*.

| -1 | Versioniert? | Do 🕶   | Docum   | Docum | Sales O | Postcode | Location | Projet no. | Projec Article description   |      | Subject         |
|----|--------------|--------|---------|-------|---------|----------|----------|------------|------------------------------|------|-----------------|
| ۲  |              | 7/30/; | Drawin  | 420   | 290001  | 60308    | Frankfur | 600200     | Turm Aufzun komnakt          | -    | Anfrage zwei A  |
|    |              | 3/27/: | Service | 415   | 290001  | 60308    | Frankfur | 6002       | Versioning                   | •    | Inbetriebnahm   |
|    |              | 3/17/: | PUR In  | 130   | 290001  | 36043    | Fulda    | 6002       | Add receipt to process       |      |                 |
|    |              | 3/16/; | PUR In  | 130   | 290001  | 73207    | Ploching | 6003       | Post basket                  |      |                 |
|    |              | 3/16/; | PUR De  | 125   | 290001  | 73207    | Ploching | 600:       |                              | . [  |                 |
|    |              | 3/15/2 | PUR In  | 130   | 290001  | 20095    | Hambury  | 6002       | Execute external program     | * B. | L zu Tur        |
|    |              | 3/13/: | FUR De  | 125   | 290001  | 20095    | Hambur   | 6002       | Combine documents            | 3-   | Lzu 2 Fun       |
|    |              | 3/12/: | PUR In  | 130   | 290001  | 36043    | Fulda    | 6002       | Column total<br>Form average | b    | $\sim$          |
|    |              | 3/11/: | PUR De  | 125   | 290001  | 36043    | Fulda    | 6002       |                              | þ    |                 |
|    |              | 3/9/20 | PUR In  | 130   | 290001  | 20095    | Hamburg  | 6002       |                              | 1    | zu Projekt Turr |
|    |              | 3/9/20 | PUR De  | 125   | 290001  | 36043    | Fulda    | 6002       | Copy cell value to clipboard | b    |                 |
|    |              | 3/7/20 | PUR De  | 125   | 290001  | 20095    | Hamburg  | 600:       | Select all hits              |      | zu Projekt Turr |
|    |              | 3/5/20 | PUR De  | 125   | 290001  | 20095    | Hambur   | 600:       | Search in hitlist F7         |      | zu Projekt Turi |
|    |              | 3/4/20 | PUR In  | 130   | 290001  | 73207    | Ploching | 6002       |                              | - 1  |                 |
|    |              | 3/4/20 | PUR Co  | 145   |         | 73207    | Ploching | 6002       | Expand all                   |      | Rechnung Nr. 5  |
|    |              | 3/2/20 | PUR De  | 125   | 290001  | 73207    | Ploching | 600:       | Collapse all                 |      |                 |

#### Fig. 89: Columns search in hitlist

2. Now click in the column that you wish to search (1) and start entering the values using the keyboard. The cursor jumps immediately to the result yielded by the values entered (2).

You are searching for Bergmann in the *"Name"* column of the hitlist. Click first in the *"Name column (1)"* then enter **Bergmann(2)**.

Example:

Expand all



This function is only available if there is a grouping ♦ Chapter 4.2.3 "Group" on page 62.

HABEL® Dokumentenmanagement

Reduce all



This function is only available if there is a grouping ♦ Chapter 4.2.3 "Group" on page 62.

# 4.3.1 Process chains

To combine individual entries into procedure groups, use the Process chains function.

Here are some examples of when to use this function:

- Documents accrue subsequently and are archived later.
- Delivery notes and invoices are to be viewed as a single procedure.
- Generation of electronic files/dossiers.

To combine procedures, virtual groups are created. These can be created either manually or automatically by special programming. To combine manually, you must first activate the function.

- **1.** Select the required hits. Hold down the *[Ctrl]* key to select multiple hits.
- 2. Right-click on one of the selected hits.
  - $\Rightarrow$  The context menu opens.
- 3. Select the command "Combine documents".
  - ⇒ The hits will now be combined in a virtual group. The combined documents are displayed in a separate part of the window.

| 2/12/2012 | 205 | N                            |  |  |  |  |  |  |
|-----------|-----|------------------------------|--|--|--|--|--|--|
| 2/12/2012 | 20  | Versioning                   |  |  |  |  |  |  |
| 2/17/2012 | 21  | Add receipt to process       |  |  |  |  |  |  |
| 2/17/2012 | 23  | Post basket                  |  |  |  |  |  |  |
| 2/17/2012 | 23  | Execute external program     |  |  |  |  |  |  |
| 2/12/2012 | 10  |                              |  |  |  |  |  |  |
| 2/28/2012 | 23  | Combine documents            |  |  |  |  |  |  |
| 2/15/2012 | 11  | Column total                 |  |  |  |  |  |  |
| 2/12/2012 | 11  | Form average                 |  |  |  |  |  |  |
| 2/12/2012 | 11  |                              |  |  |  |  |  |  |
| 3/9/2012  | 13  | Copy cell value to clipboard |  |  |  |  |  |  |
| 3/5/2012  | 12  | Select all hits              |  |  |  |  |  |  |
| 3/13/2012 | 12  | Search in hitlist F7         |  |  |  |  |  |  |
| 2/28/2012 | 12  | E-mail all                   |  |  |  |  |  |  |
| 3/7/2012  | 12  | Expand all                   |  |  |  |  |  |  |
| 3/15/2012 | 13  | Collapse all                 |  |  |  |  |  |  |

Fig. 90: Combine documents



| 2                                       | General archive [Hitlist - Standardtrefferliste Recherche - ]  | HABEL - "  |
|---|--|--|
| 全 耳를 큰 , 占<br>Start Clear Archive Tapon | High Booment Versioning Base Versioning  |  |
| EARCH III                               | 107 hts Company 01 Autzug HABEL GmbH & Co. KG Projet no. 660200 Document Annotations   | A  |
| Company<br>D1 Aufzug HABEL GmbF         | Det a subministrative to grad to the solution.   | Aufreq August, Benefit & C. e. NJ.   |
| Document type                           | Ry Versionert/ Document tatu Document type (Document type (Document type (Document type) (Docu | annen ann  |
|   | ZP Versonert) Document data (Document hype description [Sales Order + Peatoda) (Location   Projet no. Projet Norm (Article description   Si     Zera)     ZPX/2012 225 Sales havio: 299001 60308 Frankfurt am Mair 600000 Turm AG Arbetszer Technik Au   |  |
| locument date                           | 2/12/05/2 1/0 Bill basis 20001 2000 Hashas (00/06 Task Af Pablic Medal Line a  | means an limber  |
|   |  | Autom Antonio  |
|   | And and a second s   | a manual martine and the state   |
| Customer/Supplier No.                   | 2/12/2012 200 Sales Soperation 2000 Pranting an Mair 00/200 i umm Au Autog compart Ai      202     213/2012 215 Sales Order confirmation 20000 F0300 F124/0114 am Mair 60/200 F 124/014 Ar Mair 60/200 F124/014  | Transfer States  |
| 1                                       | 2 2012/2012 STr. Puter Sector 200001 20001 20000 Puter 200000 Puter 20 Puter 20 Puter 1  |  |
| Date of archiving                       | 2/1//2012 2-23 Sales Delvery note 229001 60306 Prantfurt am Mar 60/2001 Turm Au Practaturg Av      2/1/2/2012 2-23 Sales Delvery note 229001 60306 Prantfurt am Mar 60/2001 Turm Au Aufzug kompolit Au   | MARKET AND A THE A THE AND A THE A T |
| // 目 // 目                               | 2/12/2012 100 PUR Ingury 290001 20095 Hamburg 600200 Turm AG Glastursystem, Modell E23-Lzu   | in Theorem 2   |
|   | 2/2/2/2/12 235 Sales twoice 290001 6005 Frankfurt am Mair 60200 Turm AG Tellechnung Ar   | There is a second secon |
| hojet no.                               | 2/15/2012 115 PUR Order confirmation 29001 20095 Hamburg 600200 Turm AG Stahlbir, Modell H 8-5 zu Face 1   | transmith a  |
| 600200 🗄                                | 2/12/2012 110 PUR Order 20001 2005 Hamburg 600200 Turm AC Stability. Modell H 8-5 20   |  |
| locument no.                            | 2/12/2012 110 PUR Order 290001 20095 Hamburg 600200 Turm AG Glastursystem, Modell E23-L zu   | E STATION CONTRACTOR   |
|   | 200/2012 120 FUR Second 20001 20001 United 20205 Tomat 17 Plable Medall U.S.F. at  |  |
| iales Order no.                         | 2/5/2012 125 PLI2 Delivery rote 20001 20095 Hamiburg 60200 Turm 4C Stability Model H 8-5 20  |  |
| alles on de mo.                         |  |  |
|   | 3/11/2/2012 125 PUR Delivery note 250001 2005 Hamburg 600200 Turm AC Glastingshem, Modell E324 zu 2011   |  |
| iubject                                 | 3/7/2012 125 PUR Delivery note 290001 20095 Hamburg 600200 Turm AG Stahlbir, Modell H 8-5 zu   |  |
|   | 2/16/2012 120 Bill Samira 20001 5008 Maniferia A00305 Term AC Chatternation Midel P214 m. 1 mm Get in Tables in  |  |
| ull test                                | 3/12/2012 150 FUN attender 2000/1 2009 namour 000200 Turn AD aufzugedatur In attag editors In attag editors In   |  |
|   | 2/15/2012 115 PUR Order confirmation 290001 20095 Hamburg 605200 Turm AG Glastursystem, Model 823-1 zu v   |  |
|   |  |  |
|   | Group-E) Company (Document typ) (Document on (Document dati/Auftrage+4) Sestell is (Dotemal document no)(Hamel (Jochtor) Total amount ne (Information Bio) (Date of archeving  |  |
|   | Proje 2  |  |
|   | inter a datta te dragday e   |  |
| пıю                                     |  | of of Tof2 + N   |
|   | • With note  |  |

Fig. 91: Combine documents

When you combine documents which already belong to a group, you will be asked whether the document is to be added to the group or a new group created.

| Vorgangsketten zusamm                      | enfügen |  |
|--|---------|--|
| Neue Vergangskette<br>OSCTOB9T<br>1TETL24Q |         |  |
|  |         |  |

Fig. 92: Join process chains

To remove documents from the groups:

- **1.** Right-click on the entry in the "Process chains" area.
- **2.** Then select *"Delete from group"* in the context menu.

To display or edit documents (display or information mode), they must be part of the hitlist and not just appear as an overview in the *"Search combined operations"* section. To do this, use the command *"Display document from process chain"* in the context menu.

This starts a background search for all documents, which then appear in the hitlist. These are then available for display or information. Examples:



# 4.4 Logs and history

HABEL-SCRIPT for retrieval

This function allows call-up from the hitlist by external applications such as ERP. The context menu is opened in any database field within the hitlist.

When you select the application (ERP, financial accounting etc.), a script is run which displays the procedure in the external application. Any database content you wish can then be transferred to the external application. The scripts are controlled depending on the company and document type of the selected procedure and depending on the database field. Scripts are generated on an individual basis according to a collective definition.

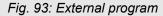


#### NOTICE!

In order for the procedure to be displayed in the external application, a communication interface for this must be set up in that application. Please contact the software manufacturer about this.

Select the corresponding menu item to initiate call-up of the procedure in an ERP system. The document number belonging to the document (e.g. order number etc.) is sent to the ERP system and the procedure is called up accordingly.

| 7 | Document type description | Postcor ~ | Sales Order no.   | Document typ | e Document date    | Location F     |
|---|---------------------------|-----------|---|--------------|--------------------|----------------|
|   | Sales Correspondence      | 60308     | 290001  | 255          | 2/14/2009          | Frankfurt am M |
|   | Sales Correspondence      | 60308     | 290001  | 255          | 2/14/2009          | Frankfurt am M |
| ٠ | Sales Correspondence      | 60300     | 200001  | 755          | 2/14/2009          | Frankfurt am M |
|   | Sales Correspondence      | 603       | Versioning  | •            | 2/14/2009          | Frankfurt am M |
|   | Sales Correspondence      | 603       | Add receipt to process<br>Start workflow                                      |              | 2/14/2009          | Frankfurt am M |
|   | Sales Correspondence      | 603       |   |              | 2/14/2009          | Frankfurt am M |
|   | Sales Correspondence      | 603       |   |              | 2/14/2009          | Frankfurt am M |
|   | Sales Correspondence      | 603       | Post basket   | ,            | 2/14/2000          | Frankfurt am M |
|   | Sales Correspondence      | 603       | Execute external program  | n 🕨          | Show document      | in Navision    |
|   | Sales Correspondence      | 603       | Combine documents   |              | Start new search i | in HABEL DMS   |
|   | Sales Correspondence      | 603       | Change fields<br>Column total<br>Form average<br>Copy cell value to clipboard |              | 2/14/2009          | Frankfurt am M |
|   | Product information       | 603       |   |              | 2/14/2009          | Frankfurt am M |
|   | Product information       | 603       |   |              | 2/14/2009          | Frankfurt am M |
|   | Product information       | 603       |   |              | 2/14/2009          | Frankfurt am M |
|   | Product information       | 603       |   | pard         | 2/14/2009          | Frankfurt am M |
|   | Product information       | 603       | 19  |              | 2/14/2009          | Frankfurt am M |
|   | Product information       | 603       | Select all hits   | 0.11         | 2/14/2009          | Frankfurt am M |
|   | Product information       | 603 🗸     | Search in hitlist   | F7           | 2/14/2009          | Frankfurt am M |
|   | Product information       | 603       | Expand all  |              | 2/14/2009          | Frankfurt am M |
|   | Product information       | 603       |   |              | 2/14/2009          | Frankfurt am M |
|   | Product information       | 603       | Collapse all  |              | 2/14/2009          | Frankfurt am M |



#### Copy cell value to clipboard

Right-click on a *"database field"*, the content of which is a value. Then click the *"Copy cell value to clipboard"* button. This value will be copied to the clipboard and can be pasted wherever you choose.



# 5 Document view

Activate/deactivate document view and document preview

| General archive (Hitlist - Standardtrefferio    | HABEL - e 💌                                  |  |        |
|---|--|--|--------|
|   | ···· .<br>                                   | Undeck. Separate window Comment  | Entres |
|   |  | Document Annotations Attachments   | 1      |
|   |  | HABEL  |        |
|   |  |  |        |
| r Postcor Locabion Project Na Article descrip   | son Subject                                  | The second secon |        |
|   |  | 10 10 10 10 10 10 10 10 10 10 10 10 10 1   |        |
| FL 371: Miami Tourenrad                         | Testdokument.                                | and a second second  |        |
| FL 371: Miemi                                   |  | an or other states and state   |        |
| 78604 Rietheim-Weille                           | Steververeinfachungsgesetz                   | to the second se |        |
| 78604 Roetheum Weille                           | HGB und Steuerrecht                          |  |        |
| 73604 Rietheim-Weilh                            | Abgabenordnung und Steuerrecht               | 1000 C   |        |
| 78604 Rietheim-Weith                            | Angebotskalkulation                          | and a second sec |        |
| 78604 Rietheim-Weilli                           | Schnittstellenbeschreibung zu ERP System     |  | 2      |
| 78604 Rathern Wollh                             | Produkthiatt Scholttstelle zu COMARCH        |  |        |
| 78604 Rietheim-Weilh                            | PPT HABEL Unternehmensvorstellung            | Fage 1   | T      |
| 78604 Retheim-Weiltr                            | Angebotskalkulation                          |  | _      |
| 60308 Frankfurt am M 600200 Turm AG Teilzahlung | elektronische Rechnung Nr. 490001            | HABEL  |        |
| 78604 Retheim-Weilh                             | Der HABEL team Weg                           | -  |        |
| 73604 Rietheim-Weilly                           | Der HABEL group Weg                          |  |        |
| 78604 Rietheim-Weilh                            | Produktblatt. HABEL GF Archiv                |  |        |
| 78604 Rietheim-Weills                           | Produktolatt HP ScanJet Enterprise Flow 7500 | +  |        |
| 78604 Retheim-Weilh                             | Produkthiatt HABEL ANEDIOUNG plus            |  |        |

Fig. 94: Activate/deactivate document view and document preview

- 1 Activate/deactivate document view
- 2 Activate/deactivate document preview

By double-clicking on the column with the left mouse button, you can activate or deactivate the view or preview.

|        | Autroug HABEL GmbH & Co, KG  Protokoll  Pass Tans As Tasksprahus Avenue (turn Ali) Reset Tasksmin (turn Ali) Reset Tasksmi |
|--------|--|
|        | Deterni 26.02.2012 Ort. Referens Werkens<br>Gerlinssool ernett is interneternikunsige Bitesztram Festegung & Aufgese   |
|        | Partie in Kalegne  |
|        | Kat. Thems/Aulgation Verant Termin     Verant Termin   |
| ~      | 1 / vaser ach in Assaintingshele ensitienter e<br>Autopas webstrager ingendast. Auf die simprimiter grie<br>etzt und 10 ein die Unterheinig und  |
| Page 1 | KADy versel     Kepter     K      |
|        | ADD protocol     Generative Cone     Cone representatives Cone     Cone representatives Cone     Cone representatives     Cone representative      |
|        |  |
|        |  |
|        |  |

Fig. 95: Document view

- 1 Preview window
- 2 Document view
- 3 Note field

The document preview is automatically updated when a document is selected.



You can add notes to the current document by using the note field in the document preview.



The original document is not changed, but remains in its original state in the archive (only once). The added notes etc. are stored separated in the database in combination with the document.

#### Zoom within the document view

|  |  |               | Adder). Illusyttike<br>Genet Kolthiam, Wolfie<br>Garry |
|--|--|---------------|--|
|  |  | -             | permit +44 Pett/col                                    |
| COR Londo<br>508 Londo<br>MANCHER<br>MANCHER | 176/8  |               | Purchase Chr.  |
| GREAT B                                      |  |               |  |
|  | No. 690002<br>heator compart & endowing, Propert No. 10  | 201208        |  |
| No.  | description  | apparisingly. | (not per unit et a                                     |
| urane.                                       | Glas door system<br>model 12311, createl glass<br>Omensuuma 2010 runs a 775 mm<br>Delivery date: 33 March 2012   | 1 pcs.        | 2.280.00   |
|  |  | net emount    | 2,269.00   |
| Lucibé<br>Mipping a<br>Develor II            | Gåst door eystem<br>model/23-14, on catal gånst<br>Ommansam: 2000 runn a 770 mm<br>Delivery slate: 13 March 2012 | 1 pcs.        | 2.280.00   |

To do this, hold down the left mouse button and drag a frame around the area that you would like to see enlarged.

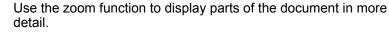
This area will be enlarged to fill the whole preview window.

Double-click in the document view to restore the document to its normal size.

#### Fig. 96: Document view area



Fig. 97: Zoom within the document view





D

#### Zoom in/zoom out

Document is enlarged or reduced in the document preview.

Rotate

Document is rotated.



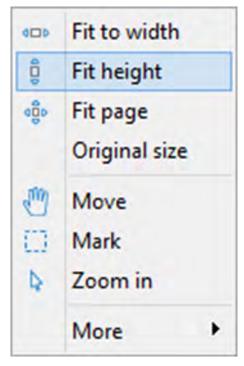


Fig. 98: More

| Fit width                | Document is adjusted to fit the maximum width of the document preview.  |
|--------------------------|---|
| Fit height               | Document is adjusted to fit the maximum height of the document preview.   |
| Fit to page              | The display of the document is expanded to fit the whole page of the preview.   |
| Original size            | The document is displayed in the preview in its original size.  |
| Move                     | With this function, you can move the docu-<br>ment upwards or downwards in the display<br>if the document is bigger than the screen<br>size. Click in the document and move the<br>cursor up or down while holding down the<br>mouse button.  |
| Mark                     | There are two different functions:  |
|                          | <ul> <li>You can add a border around text by clicking <i>"Mark"</i>. As soon as the left mouse button is released, the text content is already copied into the clipboard!</li> <li>If this is subsequently copied with <i>[Ctrl]</i> + <i>[C]</i>, an image section is copied from the marked area to the clipboard.</li> </ul> |
| Zoom in                  | You can enlarge areas in the document<br>view using the cursor. To do this, hold<br>down the mouse button and drag a frame<br>around the area to be enlarged. When you<br>release the mouse button, this area will be<br>shown enlarged.  |
| "More → Brighter"        | For documents for which a form is stored, you can set a brighter view for the form.   |
| "More → Darker"          | For documents for which a form is stored, you can set a darker view for the form.   |
| "More<br>➔ Show inverse" | Black and white document sections are shown inverse.  |
| "More ➔ Copy"            | "Copying" of text passages for use in other applications. Graphic elements and text can be marked and copied to the clipboard using [ <i>Ctrl</i> ] + [ <i>C</i> ]. (Only for documents that were read with HABEL-FULLTEXT).  |



# 5.1 Command bar — Document preview

#### Undock



By using the *[Undock]* button, you can release the document preview and document view from the window and move them into a separate window.

Fig. 99: Undock

#### Separate window



With the *[Separate window]* button, the document view is released from the display as a separate window.

#### Fig. 100: Separate window

#### Annotation

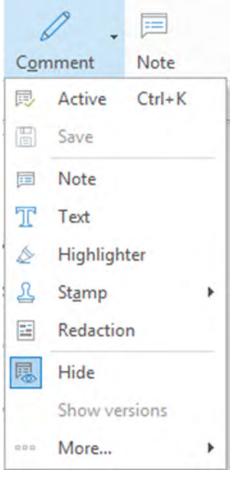


Fig. 101: Annotations

| "Annotation<br>→ Active"      | To change annotations on the document, first start the editing mode by clicking the symbol (active). A red frame then appears around the document. The active mode for the document can also be activated by <i>"Right-click</i> $\rightarrow$ <i>Edit"</i> . You can now change annotations provided that you have the corresponding rights. |
|-------------------------------|---|
|                               | During deactivation, you will be asked<br>whether you would like to save the edits<br>you made.   |
| "Annotation<br>→ Save"        | All annotations that are added to the docu-<br>ment must be saved. If you do not save<br>them, a confirmation prompt appears.   |
| "Annotation<br>→ Note"        | After clicking the symbol, you can add<br>notes. To do this, hold down the mouse<br>button and drag a frame on the document.<br>The note is preallocated with your name<br>and the capture date and ready to capture<br>the information.  |
| "Annotation → Text"           | If you only want to add text passages to<br>the document, you can create free text<br>with this function.   |
| "Annotation<br>→ Highlighter" | To highlight passages, hold down the mouse button and drag a frame over the required areas.   |
|                               | The default highlighter color is yellow, but you can customize this in the context menu.  |
|                               | <b>Highlighting in the context menu</b> : Fore-<br>ground color changes the font color, back-<br>ground color changes the fill color.   |



| "Annotation<br>→ Stamp"               | Use this symbol to add stamps. You can<br>define in advance which stamps are<br>stored. The individual stamps can be<br>accessed via the menu. To add the stamp,<br>select the required stamp and drag it to the<br>correct position and size on the document<br>while holding down the mouse button.<br>The stamp is an optionally available<br>module.                      |
|---------------------------------------|---|
| "Annotation<br>→ Redaction"           | To mask particular areas, use this symbol<br>for the redaction function. To do this, hold<br>down the left mouse button and drag a<br>frame around the area that you would like<br>to mask. You can set the color of your<br>choice.  |
| "Annotation → Hide"                   | You can hide all of the annotations for the document, such as notes, highlights and stamps, in the entire document.<br>This does not apply to the <i>"redaction"</i> .  |
| "Annotation<br>➔ Show versions"       | The command <i>"Show versions"</i> is used to show the versions of the annotations.   |
| "Annotation → More<br>→ Reload"       | The command <i>"Reload"</i> restores the most recently added annotation if it was deleted (provided that you have not saved in the meantime).   |
| "Annotation → More<br>→ Pagesettings" | To print a document, the default settings<br>can be deactivated on a one-off basis with<br>the Page settings function.  |
|                                       | You will see a selection window with infor-<br>mation on text and notes and how they will<br>be handled for printing as defined in the<br>default settings. If you do not want to print<br>any text or notes with this current print<br>operation, for example, remove the check<br>against these items. The default settings<br>will be applied again for the next printout. |
| "Annotation → More<br>→ Overview"     | The Overview function lets you search the hitlist for documents to which a note or text has been added. Select all entries in the hitlist with the key combination $[Ctrl] + [A]$ .   |
|                                       | You will see an overview of the documents<br>to which annotations have been added.<br>You will also see information on what type<br>of annotations they are (text, note), who<br>created them and the content of the note<br>and/or text.   |
|                                       | Double-click on the entry to go directly to the document with the added annotation.   |



#### Note



Fig. 102: Note

#### More

|   |                       | 000        |  |  |  |
|---|-----------------------|------------|--|--|--|
|   |                       | Extras     |  |  |  |
| 2 | Change info           |            |  |  |  |
|   | Save mail attachment  |            |  |  |  |
|   | Save document rotated |            |  |  |  |
|   | Save adjustment       |            |  |  |  |
|   | Go to next hit        | Ctrl+Right |  |  |  |
|   | Go to previous hit    | Ctrl+Left  |  |  |  |
|   | <u>T</u> iff info     |            |  |  |  |
|   | Cold info             |            |  |  |  |

Fig. 103: Document information More

By using the *[Note]* button, you can display or hide the *"Annotations"* tab.

All notes added to the document are shown in the *"Annotations"* tab.

| "More<br>→ Change info"              | For sending the document by e-mail<br>( ♦ Chapter 4.1.2 "Document"<br>on page 59). If you have defined within the<br>settings (mail settings ♥ ""Settings<br>→ Mail settings"" on page 35) that a page<br>selection is to be displayed, a prompt will<br>appear for multi-page documents asking<br>which pages are to be included in the e-<br>mail as attachments. |
|--------------------------------------|---|
| "More<br>→ Save<br>attachments"      | The attachments are saved.  |
| "More<br>→ Save document<br>rotated" | Rotated procedures can be saved in this state.  |
| "More<br>→ Save<br>adjustment"       | Adjustments can be saved. You can also<br>save on a document-dependent basis.<br>After saving, the following prompt appears:<br>This setting can be undone with the<br>[Delete] button.   |
| "More<br>➔ Go to next hit"           | The next hit is shown.  |
| "More<br>→ Go to previous<br>hit"    | The previous hit is shown.  |
| "More → TIFF info"                   | Opens the information for the TIFF file   |
| "More → Cold info"                   | Opens the information for the text files  |
|                                      |   |

## TIFF info and Cold info

Example (based on TIFF info):



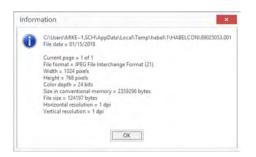


Fig. 104: TIFF info

Check signature

Only active if you are using *"HABEL ELECTRONIC SIGNATURE"* with the signing function. More details on this are provided separately in the instructions in *"HABEL ELECTRONIC SIGNATURE"*.

# 5.2 Highlight and copy document content

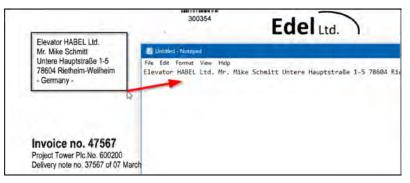


Fig. 105: Copy document contents

For documents that were read with *"HABEL-FULLTEXT"*, you can copy text from the document. To do this, click the *"highlighter tool"* in the ribbon.

As with the zoom function, you can drag a frame on the document. Make sure that the text to be copied is inside the frame.

When you release the mouse button, the text inside the frame that you have dragged onto the document will be copied automatically to the clipboard. This text can then be inserted into any other application, such as an e-mail, an ERP system or a financial accounting system. This function is available in both the document view and the hitlist if the document preview is activated.

# 5.3 HABEL ACCOUNT ASSIGNMENT STAMP

If you are using the *"HABEL ACCOUNT ASSIGNMENT STAMP"* module, you can call up the account assignment information captured for the procedure in the *"View"* tab. The data to be displayed as account assignment data is predefined. This view is often used in the context of purchase invoices that were distributed to different cost centers.



During the print process, you will be asked whether the captured additional information for the document (i.e. the account assignment data) is to be printed with the document.



# 6 Document information

The document information shows all the values of the database fields for the selected procedure. Various editing functions are available. These are described below.

| Hitint Document          | · Ed ·                         |    |                          |                           | Lones |
|--------------------------|--------------------------------|----|--------------------------|---------------------------|-------|
| - Dunge - Sher X Cercil  |                                |    |                          |                           |       |
| Company                  | 01 Aufzug HABEL GridH & Co. KG |    | Qualitätsmanagement      |                           |       |
| Document type            | 130 PUR Involce                |    | Sonstige Suchkriterien   |                           |       |
| Document date            | 03/12/2612                     |    | Contact Name             |                           |       |
| Date of archiving        | 11/18/2013                     | 15 | Location                 | Fulda                     | 100 A |
| Customer/Supplier No.    | 30001                          | 8  | Postcode                 | 36043                     |       |
| Customer/Supplier Name   | Novadyn Antriebstachnik GmbH   | 8  | E-mail address           | info@novadyn.de           | 1     |
| Projet no.               | 600200                         | 11 | Message ID               |                           |       |
| Project Name             | Turm AG                        | 8  | File no.                 | 120166                    |       |
| Document no.             | 85926                          |    | Country code             |                           |       |
| Subject                  |                                |    | Barcode                  | 274154                    |       |
| Full text                |                                |    | Batch no.                |                           |       |
| Einkauf                  |                                |    | Seller / Purchaser       |                           |       |
| PUR Inquiry no.          | 590001                         |    | Serial no.               |                           |       |
| PUR Order no.            | 690001                         |    | External article no.     |                           |       |
| PUR Delivery note no.    | 79052                          |    | Article description      | RI kompakt, Stahifahrkorb |       |
| PUR Invoice/Credit note  | 85926                          |    | Article no.              | 10015                     |       |
| Verkauf                  |                                |    | Offer existing?          |                           |       |
| Sales Offer no.          | 190001                         |    | Order confirmation exist |                           |       |
| Sales Order no.          | 290001                         |    | Delivery note existing?  |                           |       |
| Sales Delivery note no.  | 390001                         |    | Order existing?          |                           |       |
| Sales Invoice/Credit not | 490001                         |    | Invoice existing?        |                           |       |
| Fillu                    |                                |    | information box          |                           |       |
| External document no.    | 85926                          |    |                          |                           |       |
| gross amount             | 1233915.00                     |    |                          |                           |       |
| Net amount               | 1038181.00                     |    |                          |                           |       |
| Expense account          |                                | 8  |                          |                           |       |
| Expense account descrip  |                                | 8  |                          |                           |       |

Fig. 106: Document information



# 7 Versioning

You can conveniently perform version control for your documents using the check in and check out function. Capture your documents as usual. Then make changes and save the document as a new version. The changes can be documented using the **Comment function** and traced via the **Version history**.

Files with a **high rate of change**, such as Office documents, can be managed very easily in this way.

## 7.1 Versioning of documents

We will go through a typical versioning use case with you below.

#### 7.1.1 Step 1: Archive

Archive the document as usual, for example using the **plug-in** in Microsoft Word, which you will also find in the Office applications Excel and PowerPoint. For more information on this, see also the Capture Manual.



Fig. 107: Archive

You can also use this plug-in to check the archived document into or out of the Office application.

## 7.1.2 Step 2: Check out

Search for the captured document in retrieval. Use the right mouse button to click on the appropriate document and select the menu item "Versioning  $\rightarrow$  Check out".



When you check out, the current status of the document is stored locally or on a network drive. You can then edit it further. You can set the save location on a custom basis. For more information on this, see also the **Retrieval — Supplement** manual.

When a document has been checked out, other users are blocked from checking it in or out. This ensures that only one person has control of the document at any one time. This person can, however, view the document in its most recently saved state. Read access is therefore possible.

Locked documents are marked as such.

A

You can also obtain a global view of which documents are currently checked out and therefore locked. To do this, click on *"Document"*  $\rightarrow$  *Versioning*  $\rightarrow$  *Locked documents"*.

| cki File name Created by         | Created on Version Comment   |
|----------------------------------|------------------------------|
| 2 Rundenspepfikati-Schmitt, Mike | 10/05/2016 5:02:04 P 3 notiz |
|                                  |                              |
|                                  |                              |
|                                  |                              |
|                                  |                              |
|                                  |                              |
|                                  |                              |
|                                  |                              |
|                                  |                              |

#### Fig. 108: Overview of locked documents

This opens an **overview** of all the currently locked documents.



You can also display only the documents that you yourself have currently checked out. To do this, click on **My locked documents**.

To undo the editing of the checked out document and therefore restore the document to its most recent state, click again on **Check out**.

# 7.1.3 Step 3: Check in



Once you have made your changes, you must save the document. After this you can check it in. To do this, you can again use the plug-in of the respective application. Start the process by clicking **Check in**.



The plug-in is not essential for versioning. The full functionality is already guaranteed via the menu "Document → Versioning" within the "HABEL Retrieval" program.

You will be prompted to go back to the retrieval to comment on the new state. If you then confirm with Check in, the new version of the document will be transferred to the archive.



| Check-in   |   | ×                 |
|--|---|-------------------|
| Not name (Finite Orielization Transmittic Online)<br>Date (K. G. Spille (J. Spille)<br>United (K. Spille)<br>Rease entry & accorded for the changes<br>Color changed |   | Î                 |
|  | - | check-in Cancel v |

#### Fig. 109: Comment on changes

To view version information such as the version number, click on *"Versioning*  $\rightarrow$  *Versions"*.

| File | name  |                     | Lo      | cked    |
|------|---|---------------------|---------|---------|
| 4    | Protokoll_22.02.2012_interne Besprechung.docx |                     |         | 1       |
|      | Created by                                    | Created on          | Comment | Version |
|      | Habel, Systembenutzer                         | 18.12.2013 11:55:16 |         |         |
|      | Schmitt, Mike                                 | 01.08.2017 15:51:45 | Doku    |         |
|      | <   | -                   |         |         |
|      |   |                     |         |         |
|      |   |                     |         |         |
|      |   |                     |         |         |

#### Fig. 110: Versioned documents

This also shows you the stored comment and the creation date of the version.

The status of the current version is shown in the "Versioned?" column of the hitlist. This shows you whether versioning is still pending  $\bigcirc$  or has already taken place  $\boxed{\textcircled{m}}$ .

| File name  |                                    |                     |             |         |          |
|------------|------------------------------------|---------------------|-------------|---------|----------|
| 4 Video bi | etet eine leistungsstarke Möglich) |                     |             |         |          |
| Created    | by                                 | Created on          | Comment     | Version | Locked b |
| Grace Se   | mith W                             | 08/02/2018 12:13:44 |             | 1       | -        |
| Grace Se   | nith                               | 08/02/2018 12:15:58 | New Version | 2       | 2        |

Fig. 111: Archiving with drag & drop

You can also perform the check-in via the version history by dragging the document behind the most recently versioned document using drag & drop.

| ( | $\mathbf{D}$ |
|---|--------------|
|   |              |
|   |              |

#### Basically the following applies:

Certain file types such as e-mail files are automatically excluded from versioning. Versioning is not particularly useful for these files. You can also set the versioning rights specifically for each user.



# 7.2 Automatic versioning

As well as manual versioning, you can also perform automatic versioning of documents.

This must be configured on a **customer-specific** basis. To do this, please speak to our project managers. The search criteria governing allocation are crucial for automatic versioning.

For example, if a document is captured again due to a subsequent signature, it can be automatically recorded as the current version using a defined search criterion.

A possible scenario: You print a delivery note from your ERP system and archive it with HABEL using the COLD data. After your customer has signed the delivery note, the new version of the document must be added to the archive. This can be automated, for example using the delivery note number.

In this case, automatic versioning combines perfectly with manual versioning.



# 8 Function keys and key combinations

# Overview of function keys and key combinations

| Program       | Function                           |                      |
|---------------|------------------------------------|----------------------|
| All           | Print                              | [Ctrl] + [P]         |
| All           | Back                               | [Esc]                |
| Retrieval     | Master data access                 | [Ctrl] + [L]         |
| Retrieval     | Start search                       | [Ctrl] +[F]          |
| Retrieval     | Search history (forward, backward) | [Alt] + [arrow keys] |
| Retrieval     | Open information                   | [F6]                 |
| Retrieval     | End search                         | [Alt] + [F4]         |
| Retrieval     | Help                               | [F1]                 |
| Retrieval     | Overview of active users           | [Ctrl] + [U]         |
| Retrieval     | Brighter/darker                    | [Ctrl] + [H]/[D]     |
| Retrieval     | Zoom in/zoom out                   | [Ctrl] + [+]/[-]     |
| Document view | Rotate the document clockwise      | [Ctrl] + [R]         |

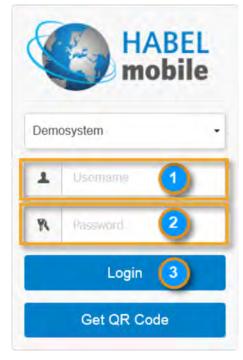


# 9 HABEL mobile

# 9.1 General

To ensure a fast response even when you are on the move, access to company documents is essential. With *"HABEL mobile"*, you can stay productive while you are out and about. *"HABEL mobile"* lets you access all the company's knowledge from any mobile end device – smartphone, tablet or PC – without local HABEL installation. Anytime, anywhere.

## 9.1.1 Program startup



Your system administrator will supply you with the website and access data you need to call up the HABEL retrieval.

Enter the *"user name"* and *"password"* under *"(1)"* and *"(2)"*. Select *"(3)"* to initiate *"login"*. The settings stored for your user data such as available database, document types and search criteria will now be loaded.

Fig. 112: Start screen/registration mask for HABEL mobile

## 9.1.2 Overview of functions

The overview with general functions is at the top of the screen.

- Demo: Shows the logged-in user name.
- Settings: For changing various settings.
- Logout: For your user to log out.

**Retrieval mask** 

The display of the available search criteria is adjusted to the end device used (smartphone, tablet etc.). The device and display size determine which selection criteria are available:



| Receipt group          |    |   |   | Receipt type |    |
|------------------------|----|---|---|--------------|----|
| Common                 |    |   |   | • T          |    |
| Company                | τ. | 1 |   |              | +  |
| Subsidiary             |    |   |   |              | +  |
| Document Subtype       | Υ. | 1 |   |              |    |
| Barcode                |    |   |   |              | 0  |
| Document date          |    |   | ø |              |    |
| Archiving date         |    |   | 0 |              |    |
| Document No.           |    |   |   |              | 0  |
| Customer-/Supplier No. |    |   |   |              | .0 |
| Customer-Supplier Name |    |   |   |              | 0  |
| Subject                |    |   |   |              | 0  |
|                        |    |   |   | Find         | 0  |

Fig. 113: Display on a notebook with web browser

Q Search

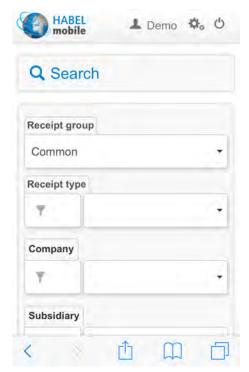


Fig. 114: Display on a smartphone

The familiar selection fields for limiting the search results are available in the retrieval mask.

| Receipt group<br>Common |          | (  |   |     | Receipt type | 2 |    |
|-------------------------|----------|----|---|-----|--------------|---|----|
| Company                 |          | ×. |   |     |              |   |    |
| Subsidiary              |          | 7  |   |     |              |   |    |
| Document Subtype        | <u> </u> | 7  |   |     |              |   |    |
| Barcode                 |          |    |   |     |              |   | P  |
| TestBool                |          | 0  |   | 1   |              |   |    |
| Document date           |          |    | - | 0   |              |   | 5  |
| Archiving date          |          |    |   | . 9 |              |   |    |
| Document No.            | -        |    |   |     |              |   | 10 |
| Customer-/Supplier No.  |          |    |   |     |              |   | 19 |
| Customer-/Supplier Name |          |    |   |     |              |   | 10 |
| Subject                 |          |    |   |     |              |   | 0  |
|                         |          |    |   |     | Fed (6)      |   | 03 |

| Item | Caption                   | Description   |
|------|---------------------------|---|
| 1    | Document group            | Depending on the configuration<br>and assigned rights, various data-<br>bases/archives can be accessed<br>(e.g. personnel, management etc.) |
| 2    | Document type             | Selection of the required document type.  |
| 3    | Client                    | Depending on the configuration<br>and assigned rights, different com-<br>panies can be selected here.                                       |
| 4    | Search criteria           | Available search criteria which can be used to limit the retrieval.   |
| 5    | Delete individual entries | Selecting <i>"X"</i> deletes values entered in the search criteria.   |



| ltem | Caption            | Description   |
|------|--------------------|---|
| 6    | [Find] button      | The search is started based on the values entered — the hitlist opens.  |
| 7    | Delete all entries | Selecting <i>"X"</i> deletes all values entered in the search criteria. |

# 9.2 Hitlist

Depending on the display size of your end device, there are two display options.

#### **Display version 1:**

As in the familiar retrieval, display is in table form:

| Q, Search | 🔚 Hitlist           |                 |  |                  |                     |       |
|-----------|---------------------|-----------------|--|------------------|---------------------|-------|
| D Page: 1 | from 2 0            |                 |  |                  |                     |       |
| Company • | Document type       | Document date + | Date of archiving • Document no. • External document no. • | Subject          | + Sales Offer no. + | Sales |
| 02        | Product information | 2/14/2009       | 2/14/2009  | EP_00000872643_  | A3                  | 2900  |
| 02        | Product information | 2/14/2009       | 2/14/2009  | EP_000000885645_ | A2.                 | 2900  |
| 02        | Product information | 2/14/2/009      | 2/14/2009  | DE_000004212259_ | C1                  | 2900  |
| 02        | Product information | 2/14/2009       | 2/14/2009  | DE_000004425051_ | ci l                | 2900  |

Fig. 115: Display version 1

| ltem | Caption                 | Description  |
|------|-------------------------|--|
| 1    | Change sorting<br>order | Selecting the arrows initiates<br>sorting based on the search crite-<br>rion in ascending or descending<br>order                 |
| 2    | Scroll                  | The number of hits shown on a<br>page is limited to a preset number<br>— selection of the arrows to scroll<br>from page to page. |



#### **Display version 2:**

| Belegdatum       | 14.02.2009         |
|------------------|--------------------|
| Belegartenbezei  | Produktinformation |
| VK Auftrag Nr.   | 290001             |
| Kunden-/Liefera  | Turm AG            |
| Artikelbeschreib |                    |
| Betreff          | DE_000004212259_C1 |
| Belegdatum       | 14.02.2009         |
| Belegartenbezei  | VK Korrespondenz   |
| VK Auftrag Nr.   | 290001             |
| Kunden-/Liefera  | Turm AG            |
| Artikelbeschreib |                    |
| Betreff          | DE_000029723101_U1 |
| Belegdatum       | 14.02.2009         |
| Belegartenbezei  | VK Korrespondenz   |
| Int. Automa Min  | 200001             |

In this version, the hits are shown one below another in blocks. The next hit is indicated by the background color and a separating line.

> In both versions, the document is called up simply by clicking on an entry in the hitlist.

Fig. 116: Display version 2

# 9.3 Document display and information

In this case too, there are two display options depending on the end device used:

**Display version 1** 

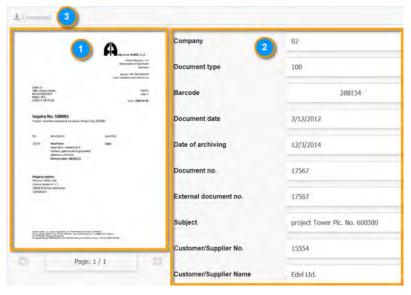


Fig. 117: Display version 1



| Item | Caption           | Description   |
|------|-------------------|---|
| 1    | Document view     | Display of the document — The<br>document is displayed in full<br>screen mode when you click on it. |
| 2    | Index criteria    | Display of the index criteria stored for the document.  |
| 3    | [Download] button | The document can be saved locally on the end device   |

#### **Display version 2:**



Fig. 118: Display version 2

| Item | Caption                                 | Description   |
|------|---|---|
| 1    | Change to the docu-<br>ment information | The index criteria with which the document was archived are shown here. |
| 2    | [Download] button                       | Local saving of the document on the end device.                         |
| 3    | Document view                           | Change to the document view   |

In this version, the document display is separate from the display of the image criteria. When you select a hit in the hitlist, the document is displayed here first.



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