

ALLES GEHABELT. ALLES GEREGLT.

Retrieval

Software manual



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1 Introduction

1.1 Preface

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

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

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

1.2 Overview

This user manual is aimed at users who work with retrieval. It explains the specific functions and settings.

1.3 Symbolism in this manual

General symbols

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

- This item marks bulleted lists.
- This line marks lists on the second level.

Cross references

Cross references are displayed as follows: ↗ “General symbols” on page 5

1.4 Information regarding this manual

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

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

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

2 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:

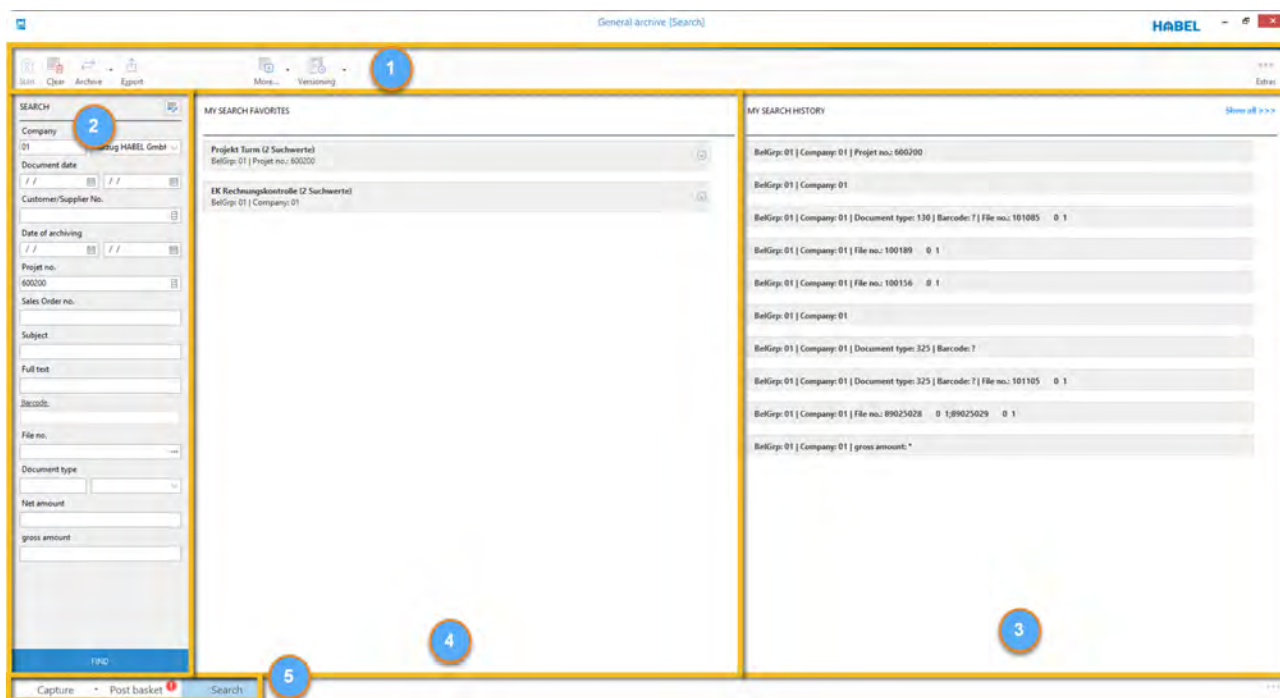


Fig. 1: Retrieval mask

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

Command bar without completed search

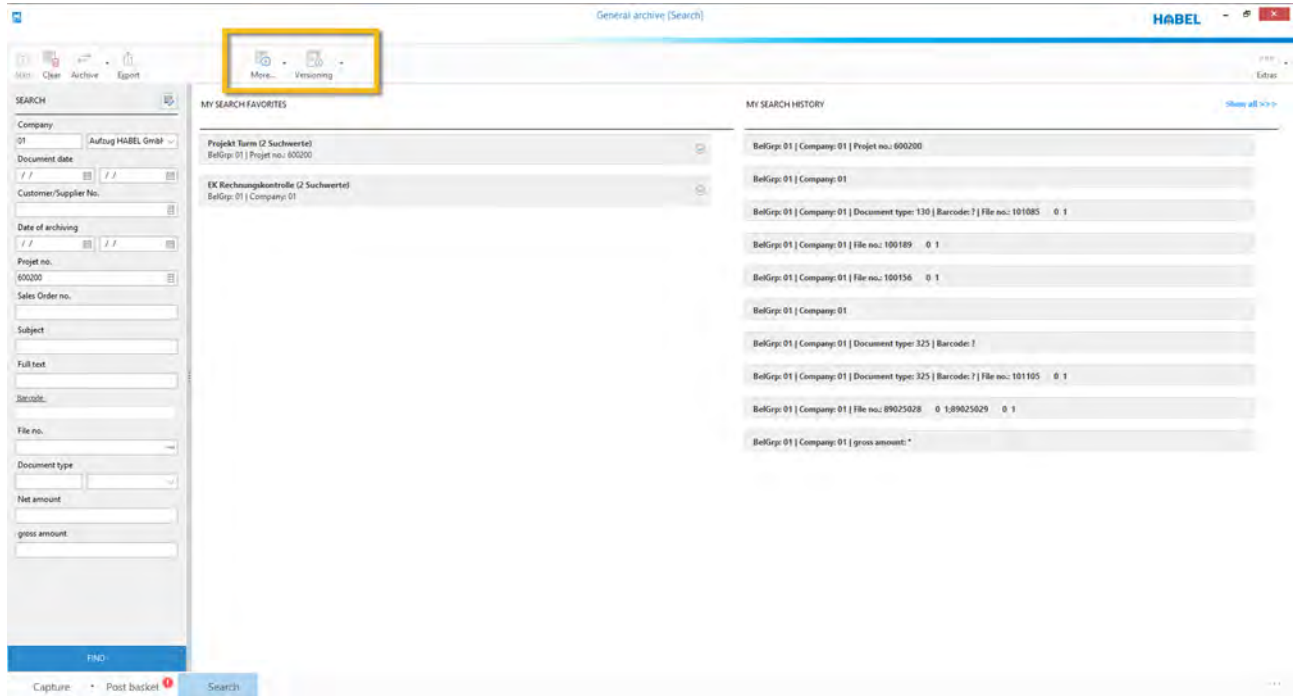


Fig. 2: Retrieval without completed search

Elements of the interface

Command bar with completed search

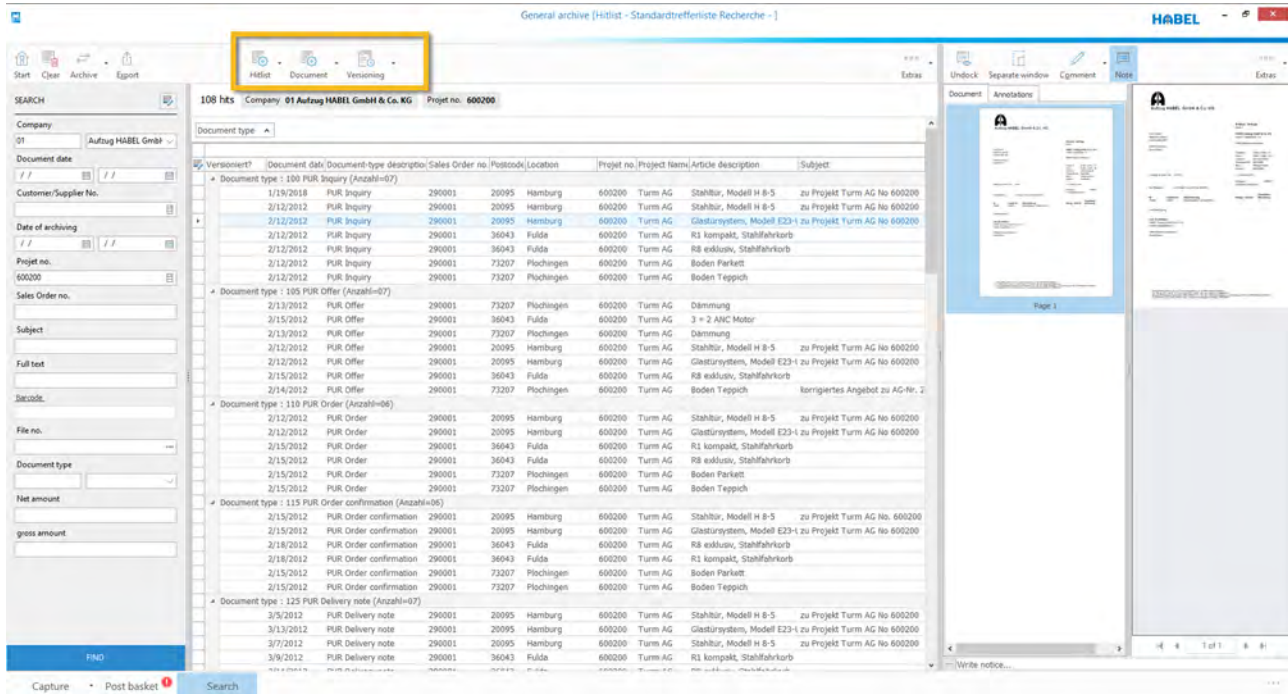


Fig. 3: Retrieval with completed search

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.

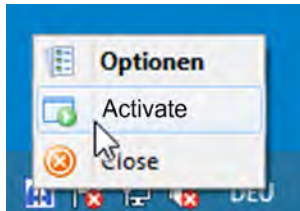
2.2 HABEL QUICKSTART (use of hotkeys)

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.

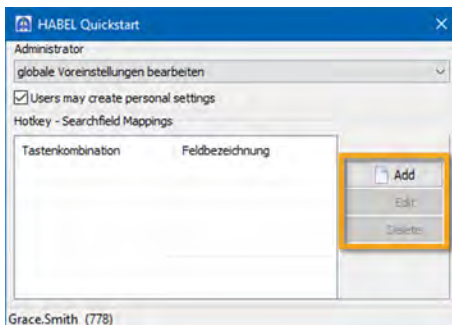


The “Options” command opens the Settings menu for the hotkey search.

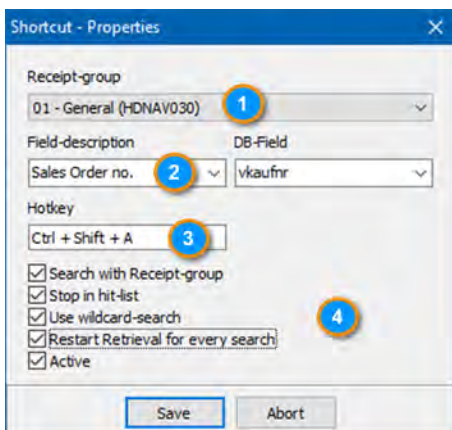


Within the settings, you can specify individual and global definitions. This depends on your assigned rights.

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



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):

Search with document group

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.

Stop in hitlist

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.

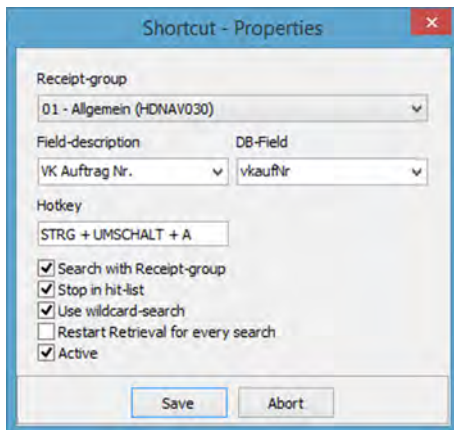
Restart retrieval for every search


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.



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

3 The search

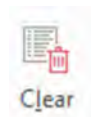
3.1 Search — Command bar

START



Use the *[START]* button to get to the start screen “Retrieval mask” Fig. 1.

Clear

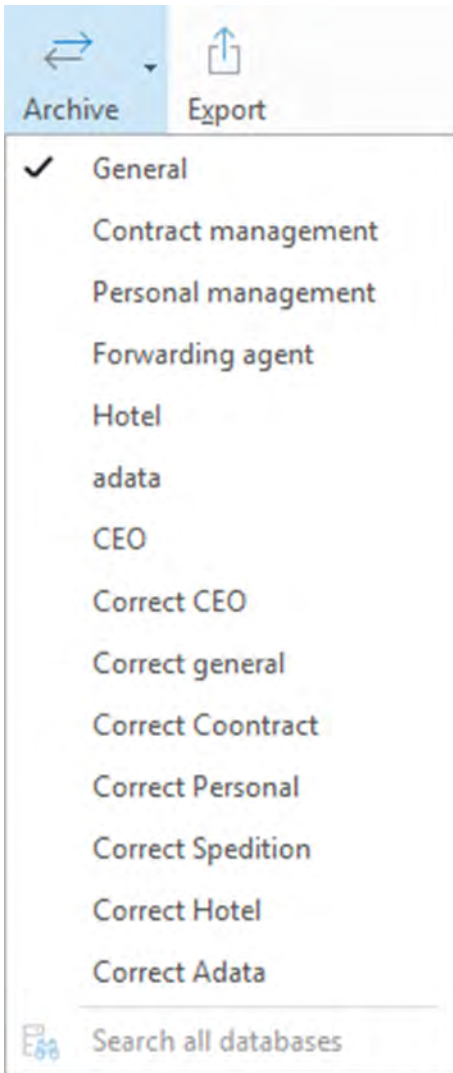


Use the *[Clear]* button to clear the contents of the search mask so that previous searches are no longer available.



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



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

Fig. 4: Archive button

Selection of multiple databases — General search

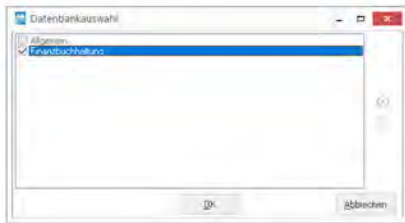


Fig. 5: General search

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

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.

Fig. 6: Extended search

From-to

Enter the lowest value, then two dots (indicates the term "to"), then enter the highest value. You can also enter further areas separated by a semicolon.

For example:

- Document type: 01..05 = Show all document types from 01 to 05
- Document type: 01..05;08..12 = Show all document types from 01 to 05 and from 08 to 12
- Cost center: 5000..5500 = Show all cost centers from 5000 to 5500
- Amount: 100;10..1398;75 = Show all amounts with 100, from 10 to 1398 or 75

or

Enter multiple terms separated by a semicolon.

For example: Document type: 01;04;05 = Show all document types with 01, 04 or 05



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!

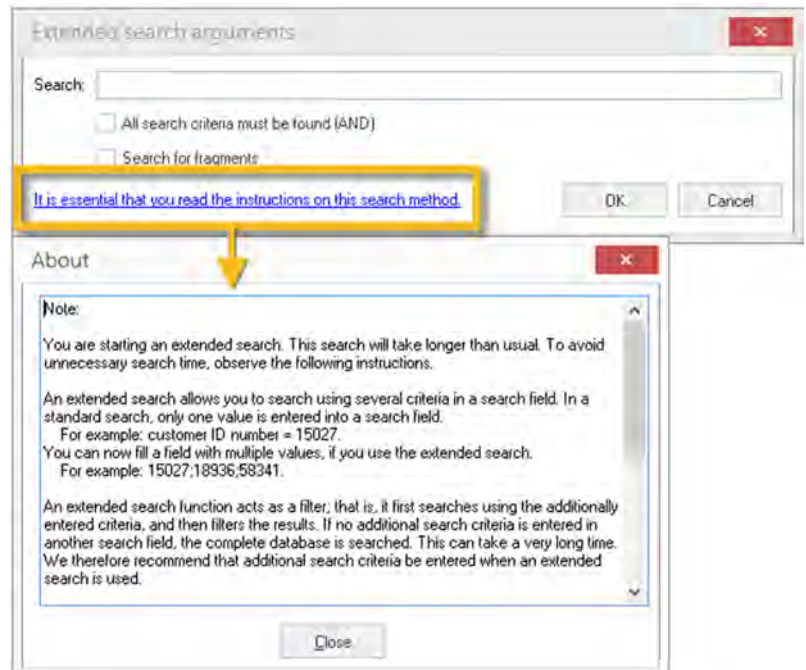
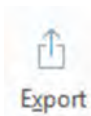


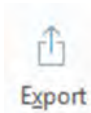
Fig. 7: Extended search instructions

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



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.

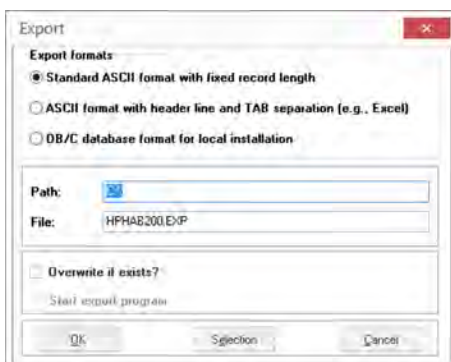


Fig. 8: Export

ASCII format with header and tab separation (e.g. Excel)

The “HABEL EXPORT Retrieval” module lets you transfer selected index data from the HABEL archive in “standard ASCII format”. This can be used for evaluations, for example.

i *If you do not enter any data, the content of the whole database is transferred for export!*

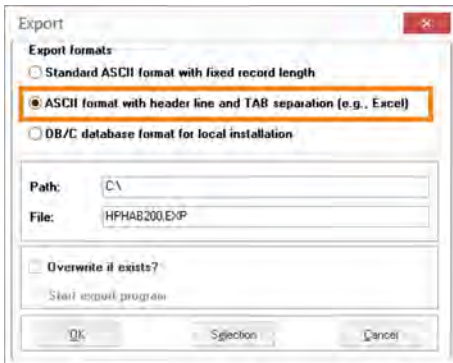
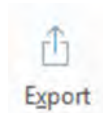


Fig. 9: Export

1. ➤ Click on the export symbol.
2. ➤ Select “ASCII format with header and tab separation (e.g. Excel)”.
3. ➤ First, enter the required search terms in the retrieval mask to obtain only the data that you want to export.
4. ➤ Start the export program with the [Export] button. Select another path if necessary with the [Selection] button. Confirm with [OK] to start the export.

i *If you activate the “Overwrite if exists?” checkbox, you will allow files that have already been exported to be overwritten.*

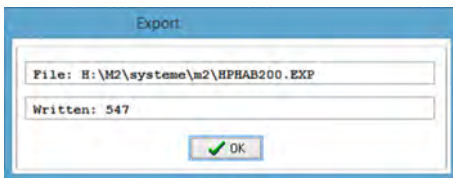


Fig. 10: Successful export

⇒ 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.

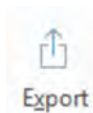
	A	B	C	D	E	F	G	H	I
1	DateiNr	SeiteNr	WormNr	SoCoKz	FormNr	Firma	Filiale	BelArt	UBelArt
2	89000129	0	1		2 h.TIF		1	235	
3	89000130	0	1		2 h.TIF		1	100	
4	89000129	0	1		2 h.TIF		1	235	
5	89000113	0	1		2 h.TIF		1	205	
6	89000113	0	1		2 h.TIF		1	205	
7	30003001	0	1		2		1	200	
8	30003001	0	1		2		1	200	
9	89025040	0	1		2	1215	1	215	
10	89000120	0	1		2 h.TIF		1	235	
11	89000122	0	1		2 h.TIF		1	230	
12	89000122	0	1		2 h.TIF		1	230	
13	89000131	0	1		2 h.TIF		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.

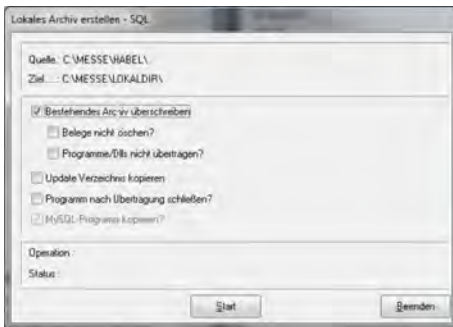
To use the retrieval “offline”, i.e. disconnected from the in-house archive, retrieval must be installed on the user's notebook.

DBC database format for local installation



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.

The search



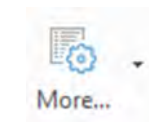
6. ➤ If the existing archive is to be overwritten, activate the corresponding checkbox. If you activate the “*Do not delete documents*” checkbox, documents that have already been exported will not be overwritten. This speeds up the export. You can also prevent current programs for the local archive from 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.

HABEL EXPORT Disc

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

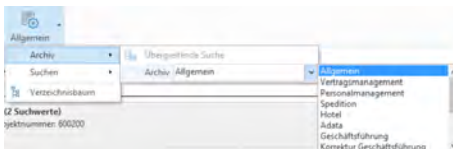


Fig. 12: Archive

“Archive”	“General search”	🔗 “[Archive] button” on page 12
“Archive”	“Archive”	🔗 “[Archive] button” on page 12

3.2.1.1 Search

Search

i 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**.

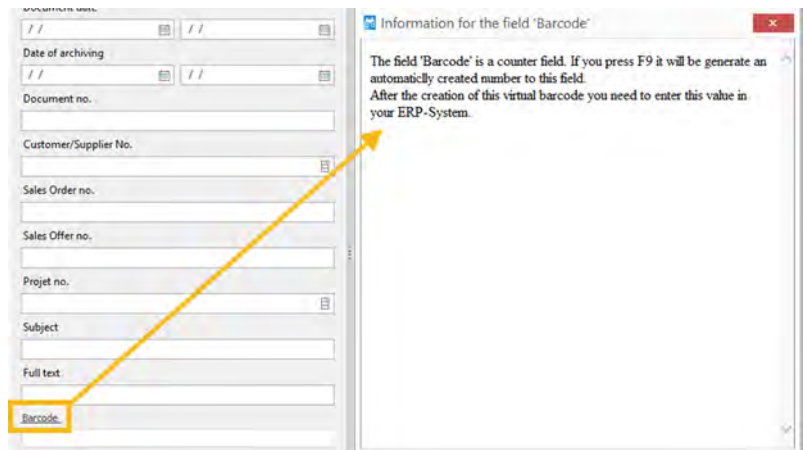


Fig. 13: Fields with help functions

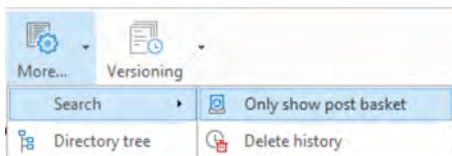
Fields can also be assigned a help function so that they are explained in more detail. The content of the help window is managed by the administrator. It must be created according to customers' individual needs and is controllable depending on the document type and field.

Only show post basket entries

You can set this refinement filter under the tab "Search favorites → General → Search → 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**.



290 hits Company 01 Aufzug HABEL GmbH & Co. KG

Drag a column header here to group by that column

Ve	Document date	Document-type description	Document t	Sales Order no.	Postcoc
	9/20/2012	Sales Correspondence	255		78604
	10/17/2013	Accounting receipt	325		78532
	3/15/2012	PUR Invoice Schmitt, Mike	130		20097
		PUR Invoice	130		20097
	3/16/2012	PUR Invoice	130		73207
	3/4/2012	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

The search

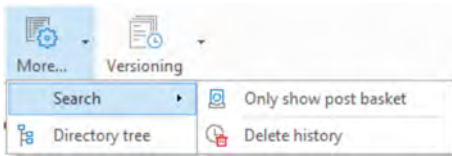
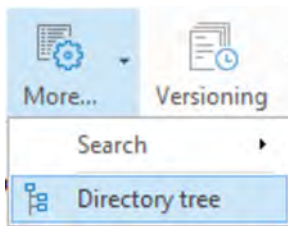


Fig. 15: Clear history

3.2.1.2 Directory tree

Directory tree



The search history ↗ Chapter 3.5 “Search history” on page 54 is deleted.

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 → Directory tree”.



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.

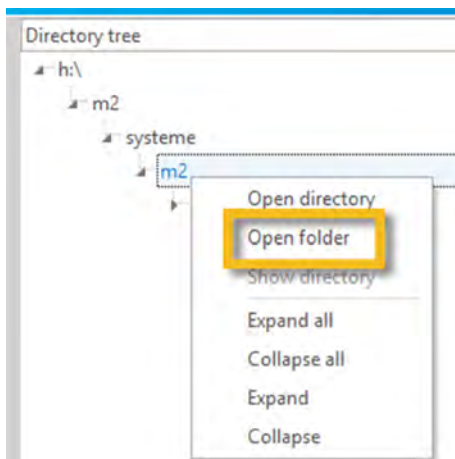


Fig. 17: Directory tree context menu

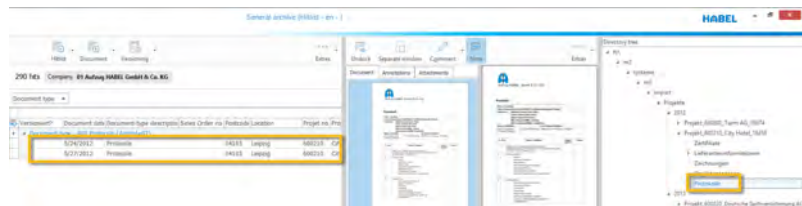


Fig. 18: Hitlist

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.

3.2.2 Versioning

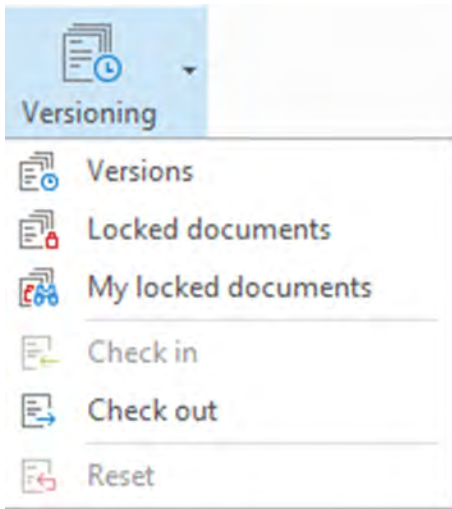
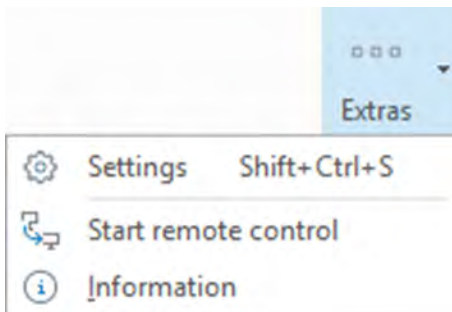


Fig. 19: Versioning

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

3.2.3 More

More



"Selection list → More"	"Settings"	<p>Opens the program settings in which the configurations can be performed.</p> <p>Please refer to the following chapter ↗ <i>Chapter 3.2.3.1 "Settings" on page 22</i> for the descriptions of the settings.</p>
	"Start remote control"	<p>When you execute the command "Start remote control", you will be taken automatically to the download area and execution of TeamViewer. This enables a HABEL employee to access your workstation and make adjustments or provide help.</p>
	"Information"	<p>Under "Information", you will find important details on your system version.</p>

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.

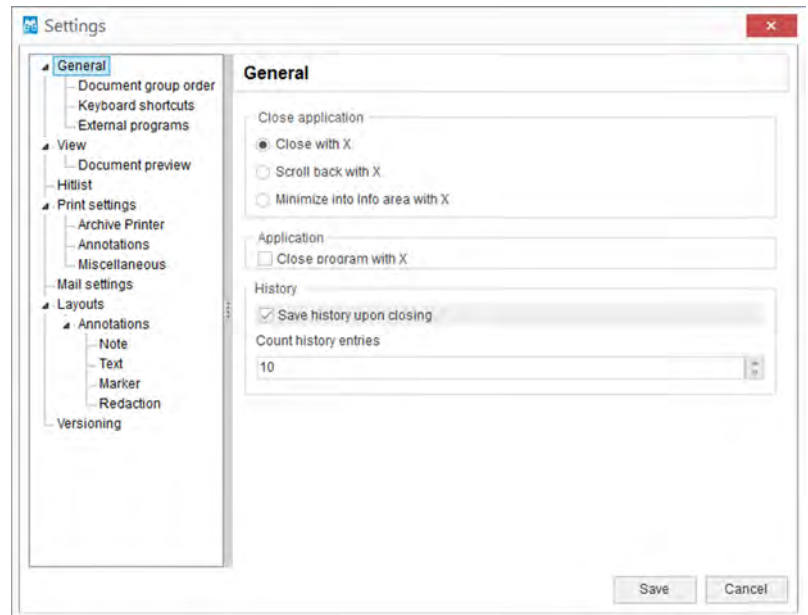


Fig. 20: "Settings → General"

"Close application"	Selection "Close with X"	If this is selected in the settings, the application is closed with the "X" button.
	Selection "Scroll backwards with X"	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 "Minimize to header area with X"	If this is selected in the settings, the application is minimized to the header area with the "X" button. The application is not closed.
"Application"	Checkbox "Always on top"	If this checkbox is active, the application remains active on the top at all times. It can still be minimized though.
"History"	Checkbox "Save history upon closing"	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”

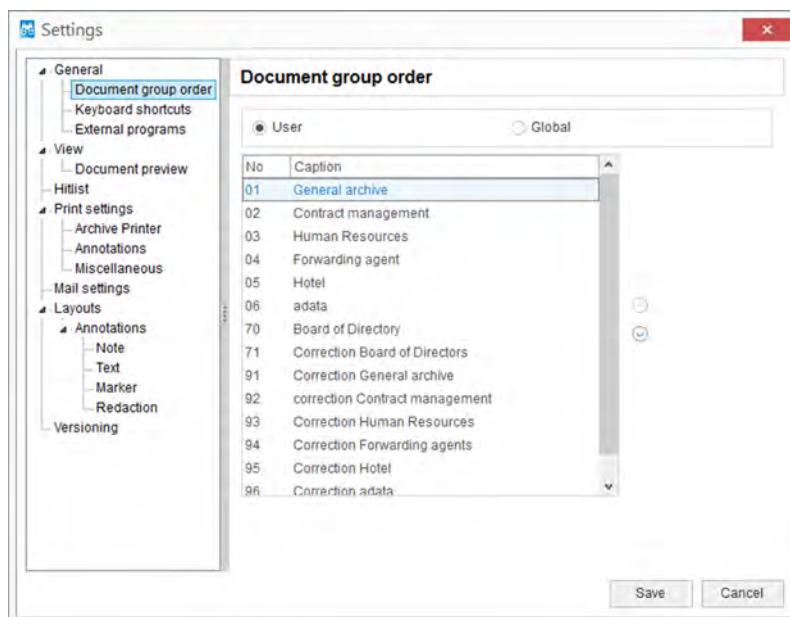


Fig. 21: “Settings → General → Document group order”

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 “user/global”	Selection of “user”	When you select “user”, the adjusted sequence is saved only for the current user .
	Selection of “global”	When you select “global”, the adjusted sequence is saved for all users . 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.

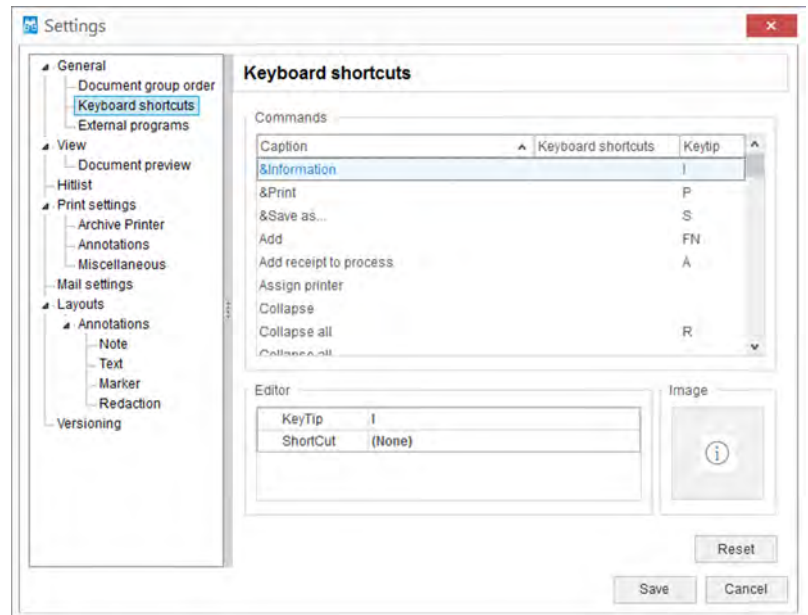


Fig. 22: "Settings → General → Keyboard shortcuts"

"Commands"	Selection of "commands"	In the table, select the relevant command to which you would like to assign a keyboard shortcut. In the column "Keyboard shortcut", you can define the actual keyboard shortcut. If you enter a shortcut that is already in use, you will see an error message. 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.

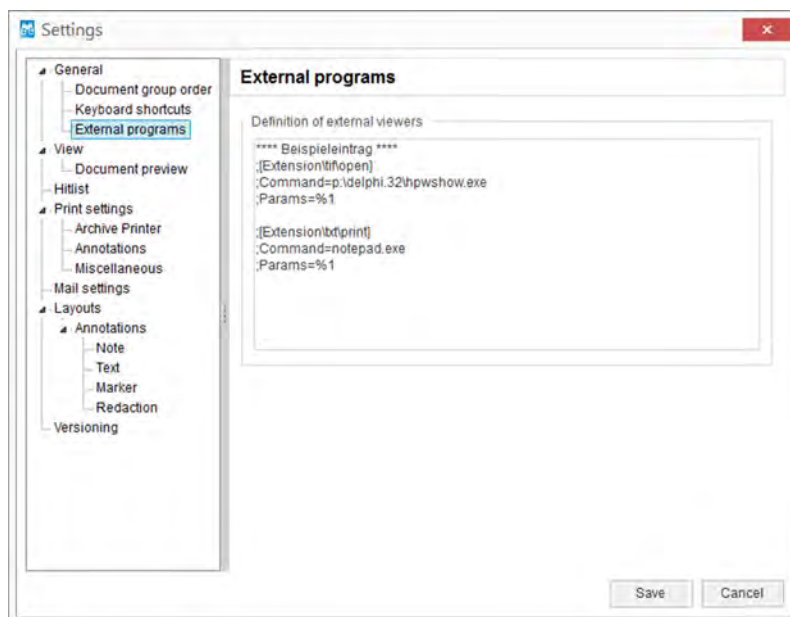


Fig. 23: “Settings → General → External programs”

Example

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**).

“Settings → View”

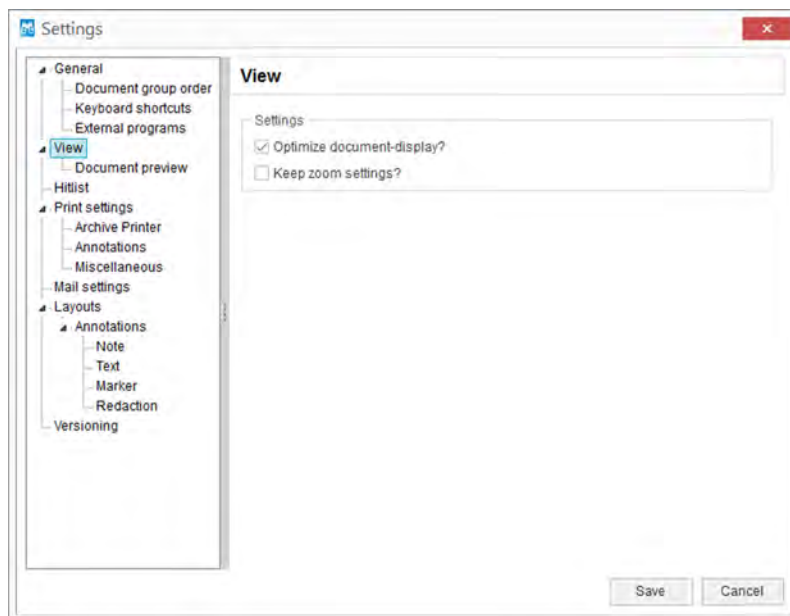


Fig. 24: “Settings → View”

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

"Settings → View
→ Document preview"

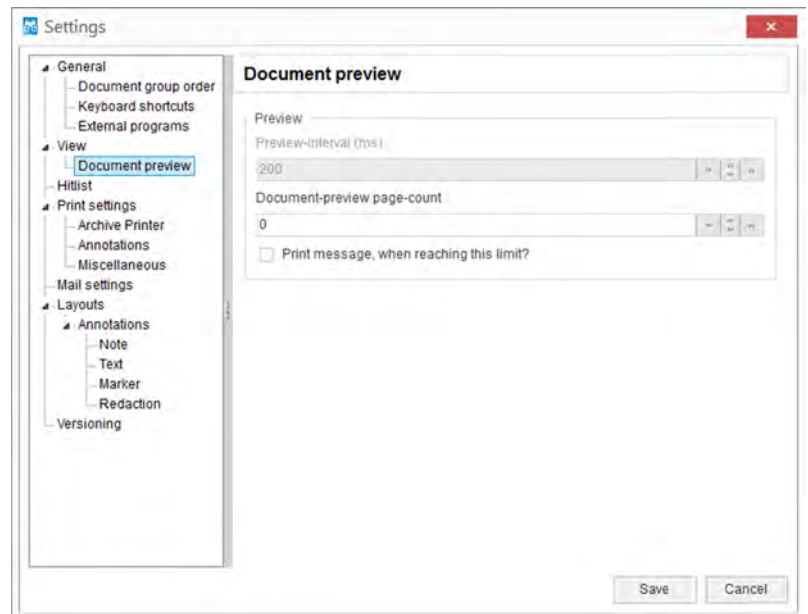


Fig. 25: "Settings → View → Document preview"

<p>“Preview”</p>	<p>Input “Preview interval (ms)”</p>	<p>“Preview interval” is used to set how long the document is to appear in the document preview after it has been selected in the hitlist.</p> <p>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.</p>
	<p>Input “Number of pages in document preview”</p>	<p>The function “Number of pages in document preview” 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 no limit.</p> <p>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 long loading time.</p> <p>In this case, it is advisable to limit the number of pages in the document preview.</p>
	<p>Checkbox “Message if this limit is reached?”</p>	<p>A message is shown if the limit is reached (Fig. 26).</p>

i *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

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

“Settings → Hitlist”

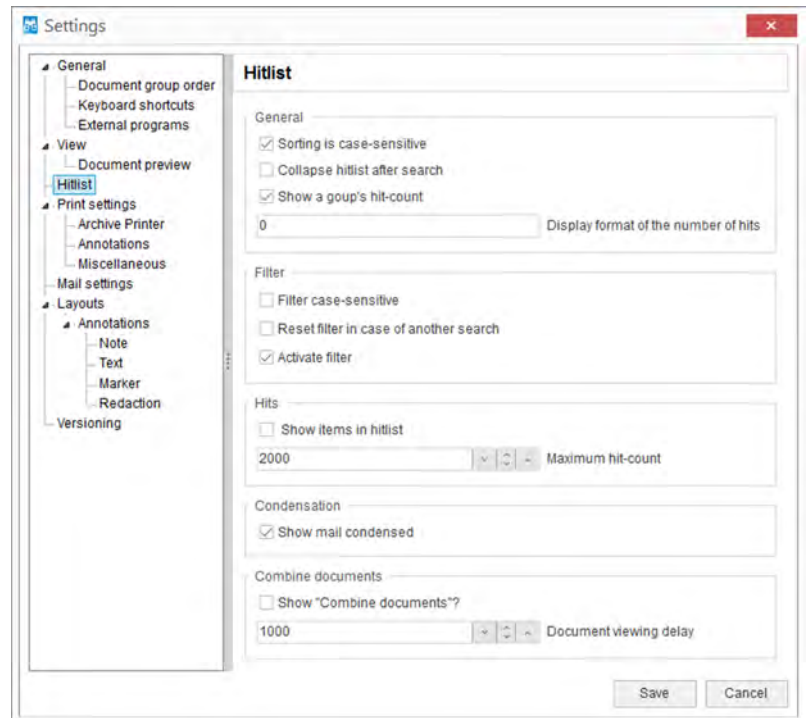


Fig. 27: “Settings → Hitlist”

“General”	Checkbox “Sorting is case-sensitive”	If you do not check this function, no distinction will be made between uppercase or lowercase field content when sorting.
	Checkbox “Collapse hitlist after search”	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 “Show a group's hit count”	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 “Count=00” could be entered here, for example Fig. 28.
“Filter”	Checkbox “Filter is case-sensitive”	If the checkbox is deactivated , the filter will not distinguish between uppercase or lowercase field content.
	Checkbox “Reset filter in case of another search”	If this checkbox is deactivated , the set filter will remain active in a new search and the search result will be refined accordingly.
	Checkbox “Activate filter”	Within the hitlist, you can make a clear selection with the aid of filter functions. If you do not want to 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 "Maximum hit count"	Use this option to set the maximum number of hits in the hitlist. This enables you to reduce the search time for searches with an extremely high number of results. If there are more hits than the maximum hit count that you have set, a message appears.
"Condensation"	Checkbox "Show mail condensed"	If you check this function, display of the archived e-mails is condensed. E-mails are archived both as a TIFF file and in their original format (Microsoft Outlook, Lotus Notes, Mozilla Thunderbird). If you activate "Show mails condensed", the e-mail will be shown as a hit in the hitlist. If an e-mail is shown condensed (provided it was archived in the original format with or without attachments), it can nonetheless be opened in the original format if you call up the entry and open the file that is displayed separately by double-clicking it. The e-mail can then be edited again (reply, forward etc.).
	Entry "Delay when reading"	This option is used to set the number of milliseconds until the system displays whether this entry is combined with others, when you scroll through the hitlist.
"Combine 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 until the system displays whether this entry is combined with others, when you scroll through the hitlist.

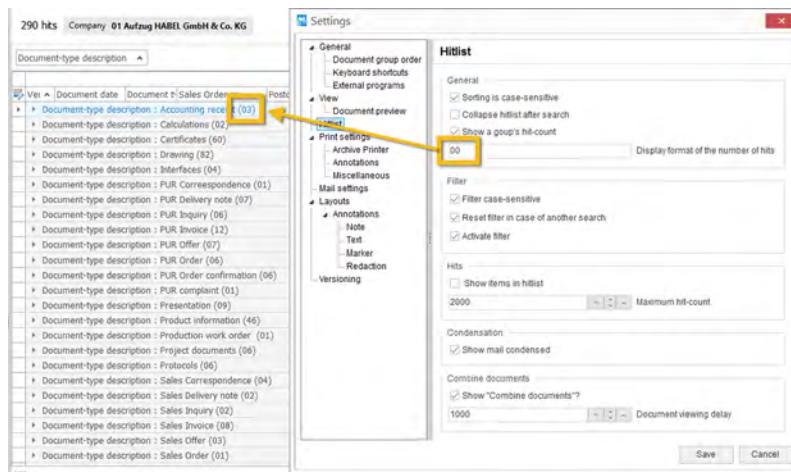


Fig. 28: Hitlist – General

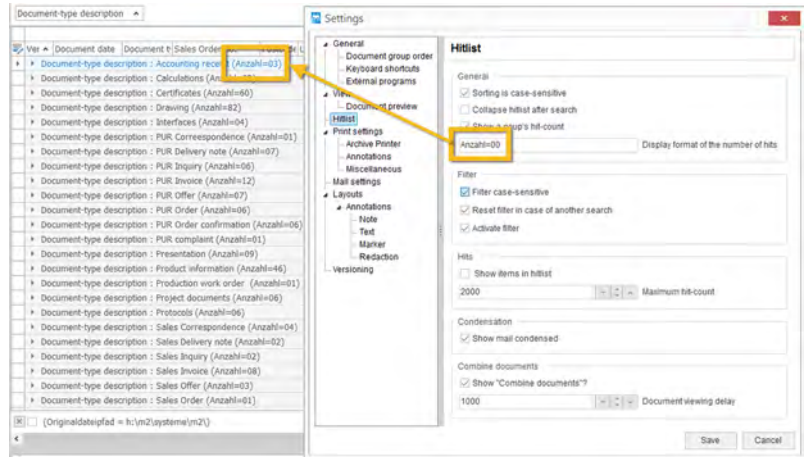


Fig. 29: Hitlist example

“Settings → Print settings”

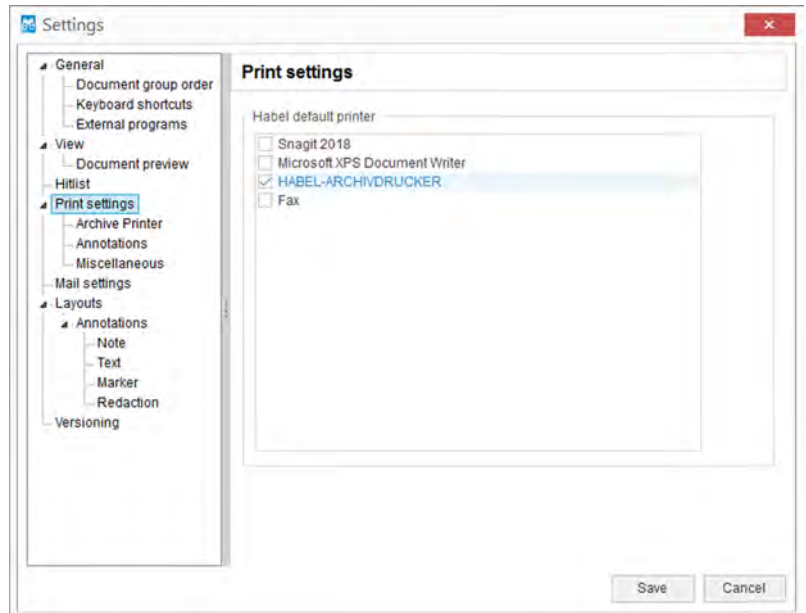


Fig. 30: “Settings → Print settings”

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

“Settings → Print settings
 → Archive printer”

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

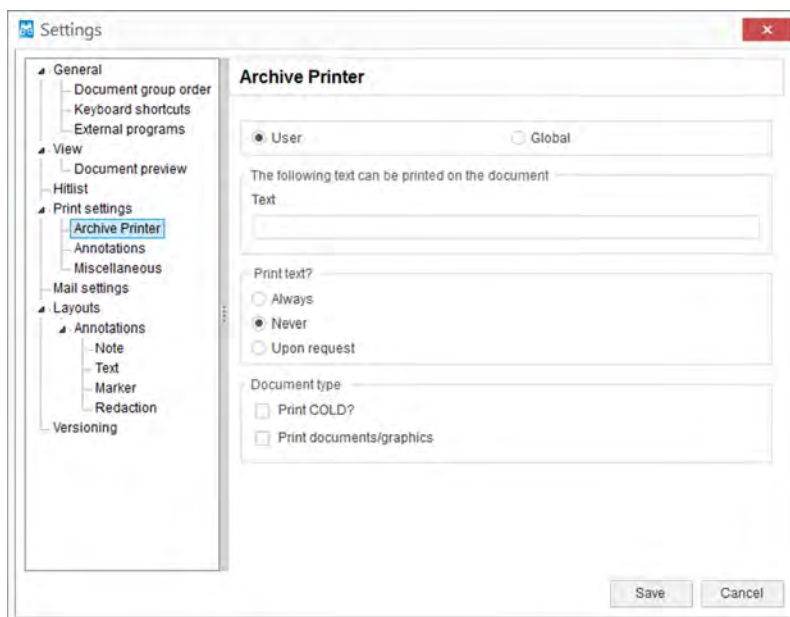


Fig. 31: “Settings → Print settings → Archive printer”

	Checkbox “User”	Select “User” to specify whether the settings should only apply to the current user.
	Checkbox “Global”	Select “Global” to specify that the settings should apply to all users. Special authorizations are required for this.
“The following text can be printed on the document”	Entry “Text”	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).

<i>“Document type”</i>	Checkbox <i>“Print if COLD?”</i>	Imprint of the texts on so-called COLD documents.
	Checkbox <i>“Print if documents/graphics?”</i>	Imprint of the texts on graphics/other documents such as PDF

**“Settings → Print settings
→ Annotations”**

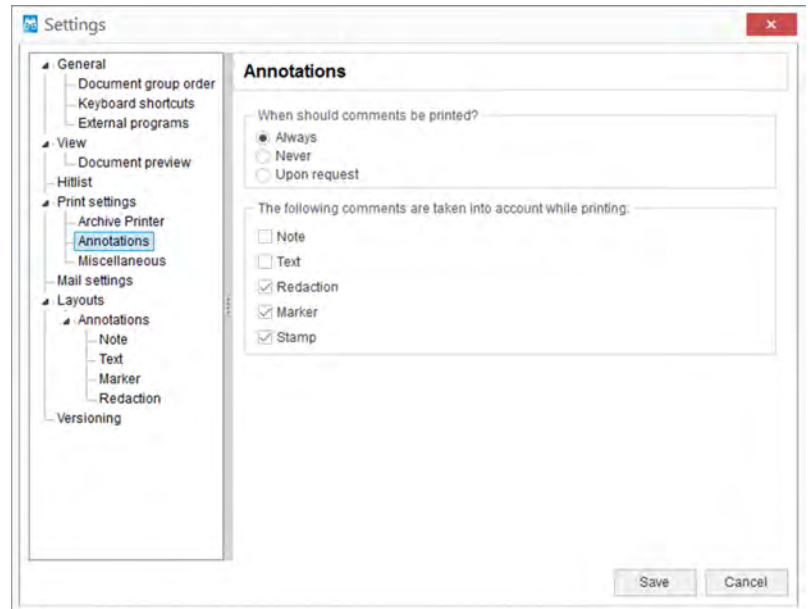


Fig. 32: “Settings → Print settings → Annotations”

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

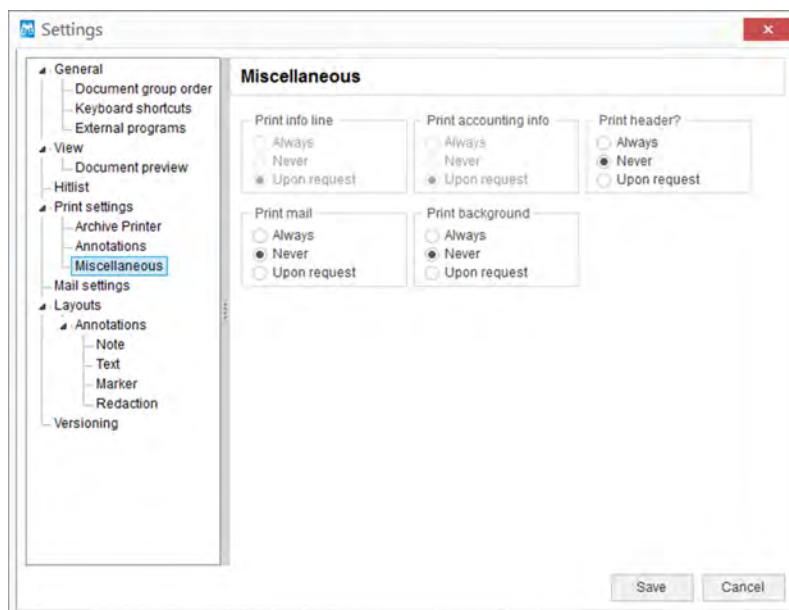


Fig. 33: “Settings → Print settings → Other”

If the settings define that, within the scope of HABEL CONNECTION, 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 ↗ [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”

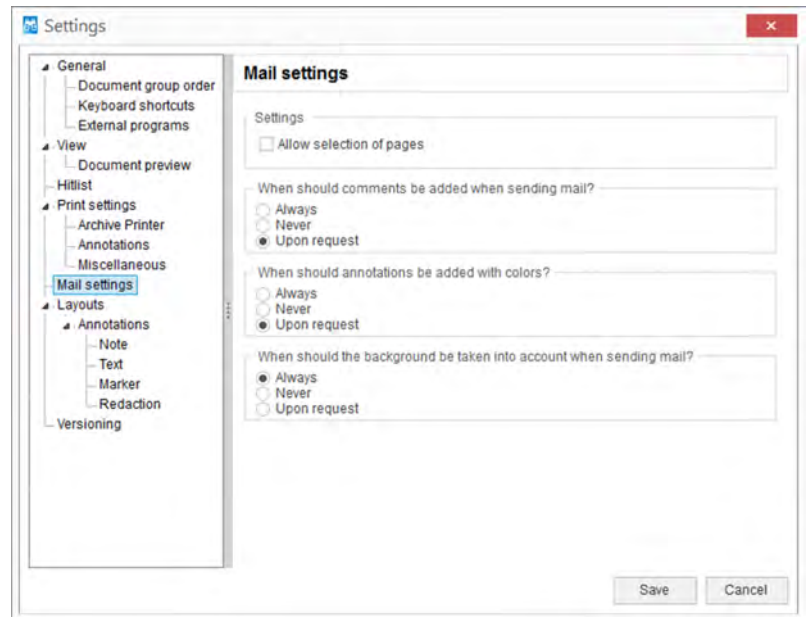


Fig. 34: “Settings → Mail settings”

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”

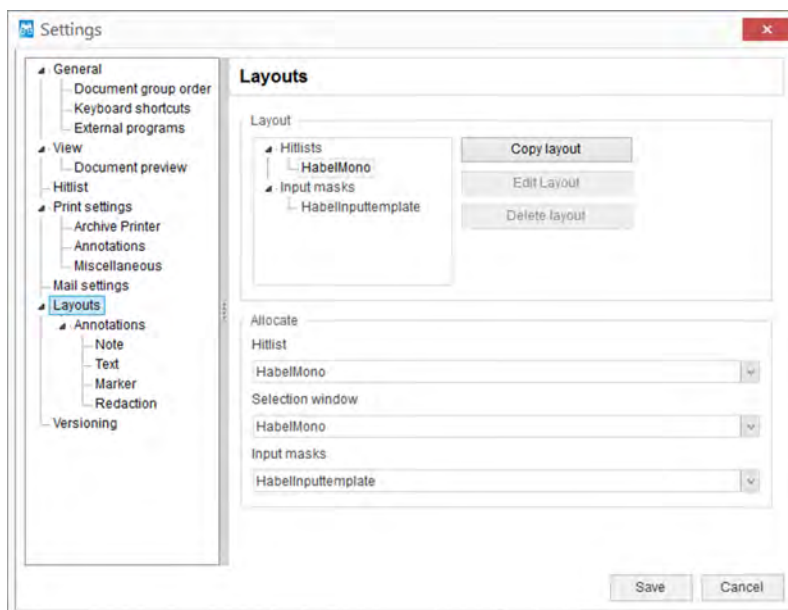


Fig. 35: “Settings → Layouts”

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:

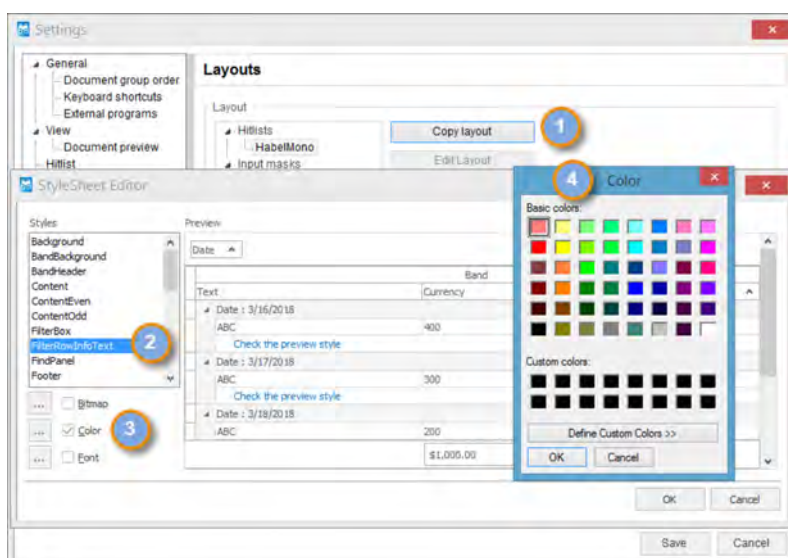


Fig. 36: Own layouts

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.

Important fields in the hitlist

Versioniert	Document-type de	Sales Order	Postcc	Location	Projekt	Project N	Article description	Subject
Document type : 100 PUR Inquiry (Anzahl=07)								
1/19/2018	PUR Inquiry	290001	20095	Hamburg	2	Turm AG	Stahltür, Modell H 8-zu Projekt Turm AG Ito 600200	
2/12/2012	PUR Inquiry	290001	20095	Hamburg	600200	Turm AG	Stahltür, Modell H 8-zu Projekt Turm AG No 600200	
2/12/2012	PUR Inquiry	290001	20095	Hamburg	600200	Turm AG	Glastürsystem, Mod zu Projekt Turm AG No 600200	
2/12/2012	PUR Inquiry	290001	36043	Fulda	600200	Turm AG	R1 kompakt, Stahlifa	
2/12/2012	PUR Inquiry	290001	36043	Fulda	600200	Turm AG	R8 exklusiv, Stahlifa	
2/12/2012	PUR Inquiry	290001	73207	Flochingen	600200	Turm AG	Boden Parkett	
2/12/2012	PUR Inquiry	290001	73207	Flochingen	600200	Turm AG	Boden Teppich	
Document type : 105 PUR Offer (Anzahl=07)								
2/13/2012	PUR Offer	290001	73207	Flochingen	600200	Turm AG	Dämmung	
2/15/2012	PUR Offer	290001	36043	Fulda	600200	Turm AG	3 + 2 ANC Motor	
2/13/2012	PUR Offer	290001	73207	Flochingen	600200	Turm AG	Dämmung	
2/12/2012	PUR Offer	290001	20095	Hamburg	600200	Turm AG	Stahltür, Modell H 8-zu Projekt Turm AG Ito 600200	
2/12/2012	PUR Offer	290001	20095	Hamburg	600200	Turm AG	Glastürsystem, Mod zu Projekt Turm AG No 600200	
2/15/2012	PUR Offer	290001	36043	Fulda	600200	Turm AG	R8 exklusiv, Stahlifa	
2/14/2012	PUR Offer	290001	73207	Flochingen	600200	Turm AG	Boden Teppich	korrigiertes Angebot zu AG-Nr. 2
Document type : 110 PUR Order (Anzahl=06)								
2/12/2012	PUR Order	290001	20095	Hamburg	600200	Turm AG	Stahltür, Modell H 8-zu Projekt Turm AG No 600200	
2/12/2012	PUR Order	290001	20095	Hamburg	600200	Turm AG	Glastürsystem, Mod zu Projekt Turm AG No 600200	
2/15/2012	PUR Order	290001	36043	Fulda	600200	Turm AG	R1 kompakt, Stahlifa	
2/15/2012	PUR Order	290001	36043	Fulda	600200	Turm AG	R8 exklusiv, Stahlifa	
2/15/2012	PUR Order	290001	73207	Flochingen	600200	Turm AG	Boden Parkett	

Fig. 37: Important fields in the hitlist

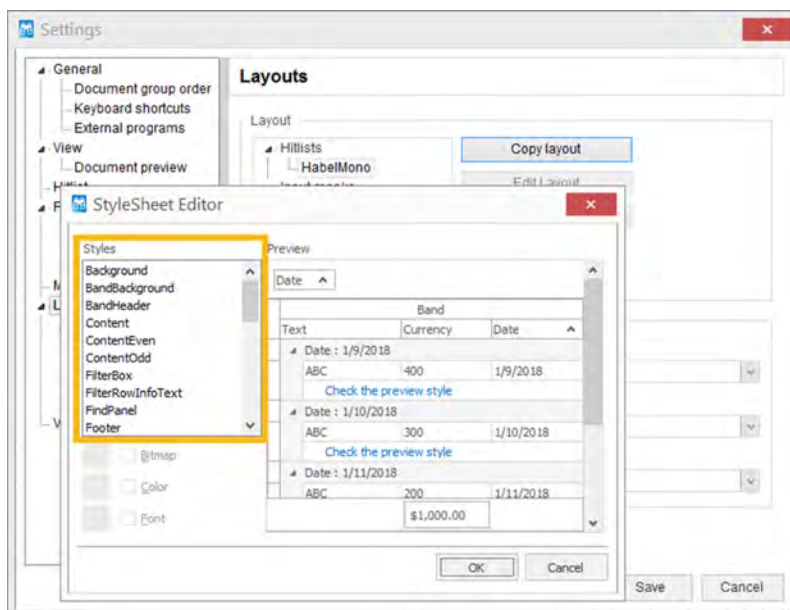


Fig. 38: Styles

The fields of the input mask are defined under “Settings → Layouts → StyleSheet Editor”.

Item	Caption	Description
1	Background	Defines the free space in the background.
2	ContentEven	Together with “ContentOdd”, formats the colors/font size of the rows in the view (alternately).
3	ContentOdd	Together with “ContentEven”, formats the colors/font size of the rows in the view (alternately).
4	Group	Influences the display of the grouping.
5	Header	Influences the column header, but can only affect the font and font size, depending on the pre-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”

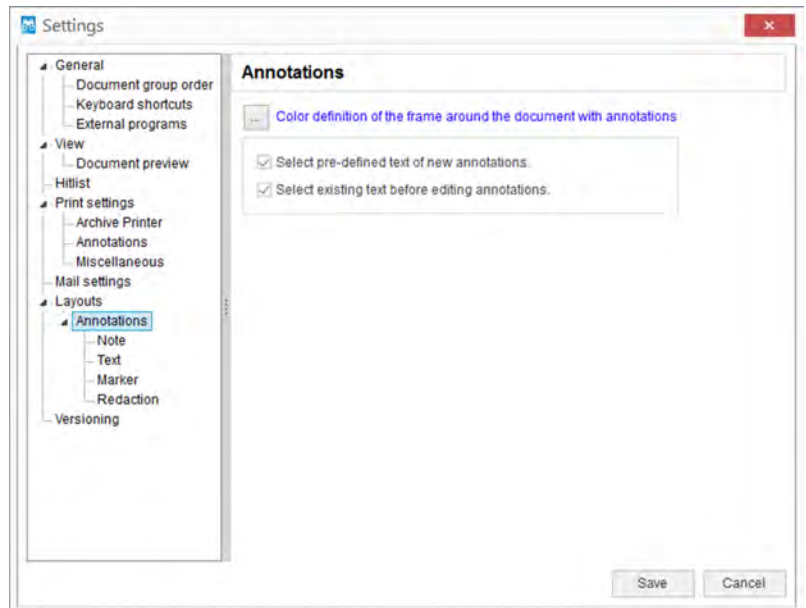


Fig. 39: “Settings → Layouts → Annotations”



Fig. 40: Frame around documents
with 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.

“Settings → Layouts
 → Annotations → Note”

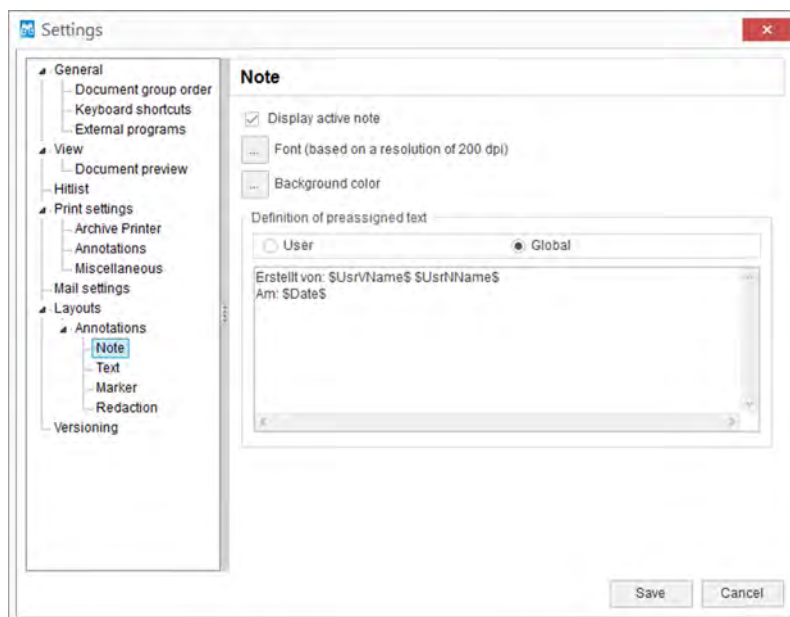


Fig. 41: “Settings → Layouts → Annotations → Note”

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 background. Additional settings for the **Definition of preassigned text** can be configured by the administrator for each **User** individually or on a **Global** basis.

“Settings → Layouts
 → Annotations → Text”

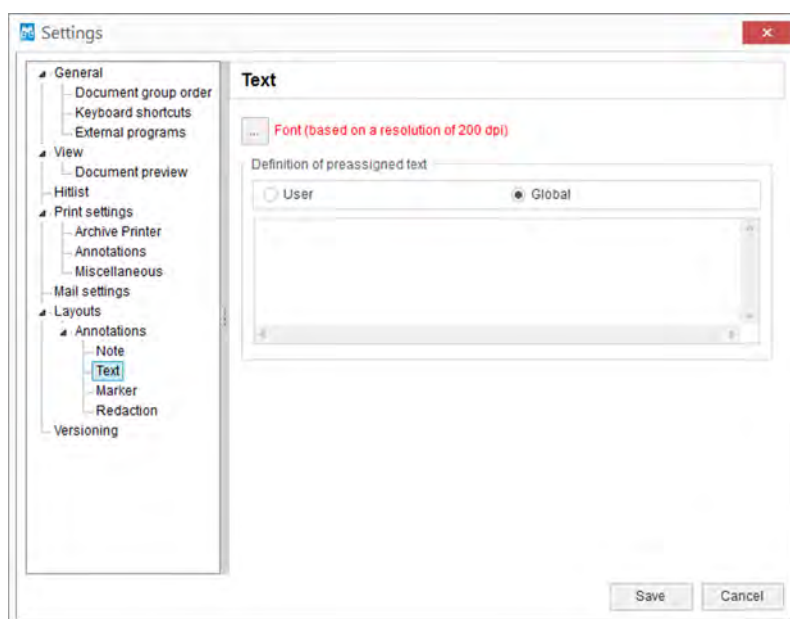


Fig. 42: “Settings → Layouts → Annotations → Text”

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.

“Settings → Layouts
→ Annotations → Marker”

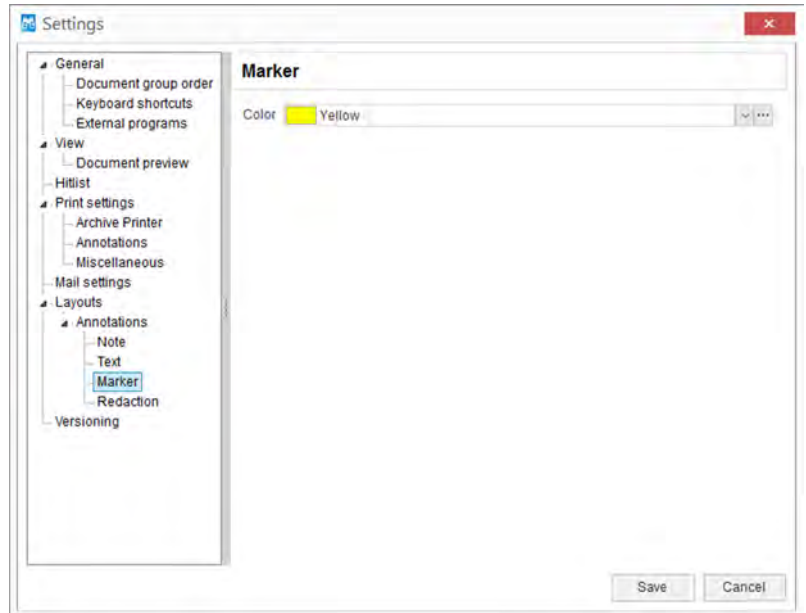


Fig. 43: “Settings → Layouts → Annotations → Marker”

You can configure the **color** for text markings here:

“Settings → Layouts
→ Annotations → Redaction”

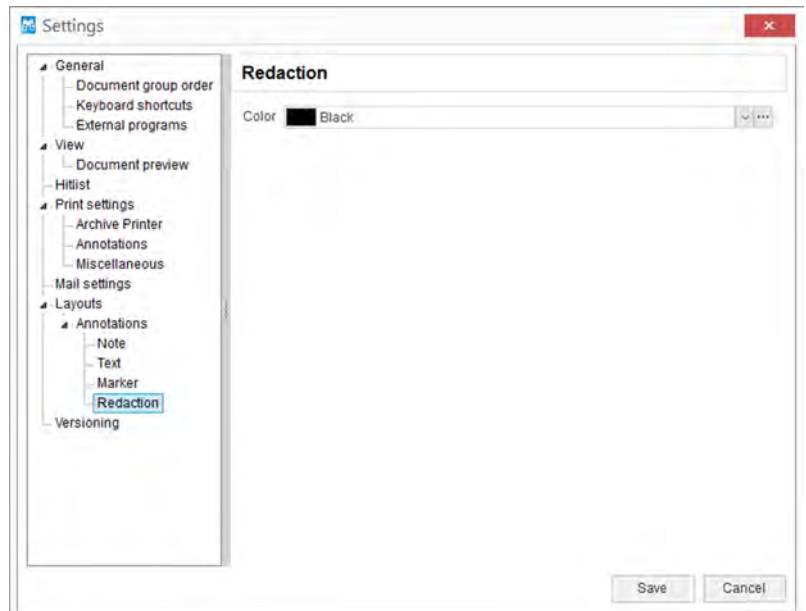


Fig. 44: “Settings → Layouts → Annotations → Redaction”

Here you can set the **color** for the editorial entry.

“Settings → Layouts
→ Versioning”

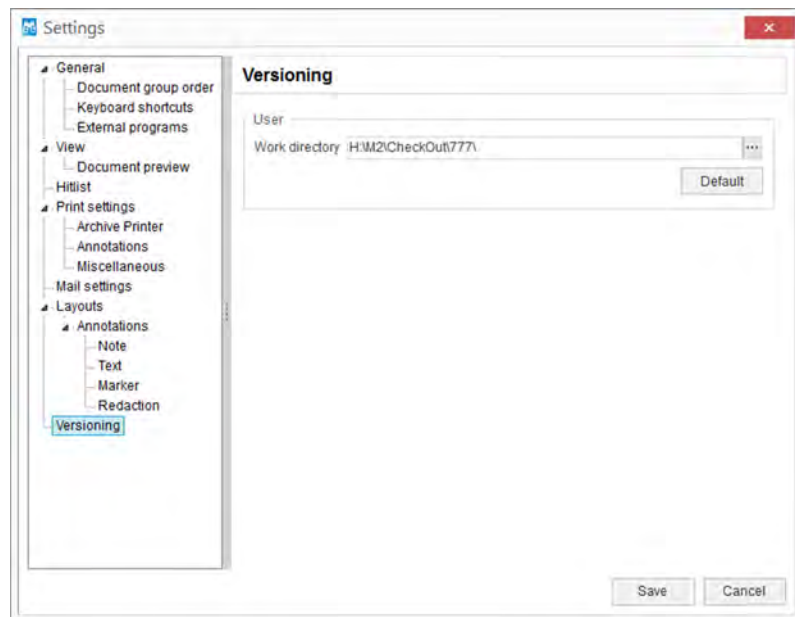


Fig. 45: “Settings → Layouts → Versioning”

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 be taken automatically to the download area and execution of TeamViewer. This enables a HABEL employee to access your workstation and make adjustments or provide help.

3.2.3.3 Information

Under “*Information*”, you will find important details on your system version.

3.3 Search 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

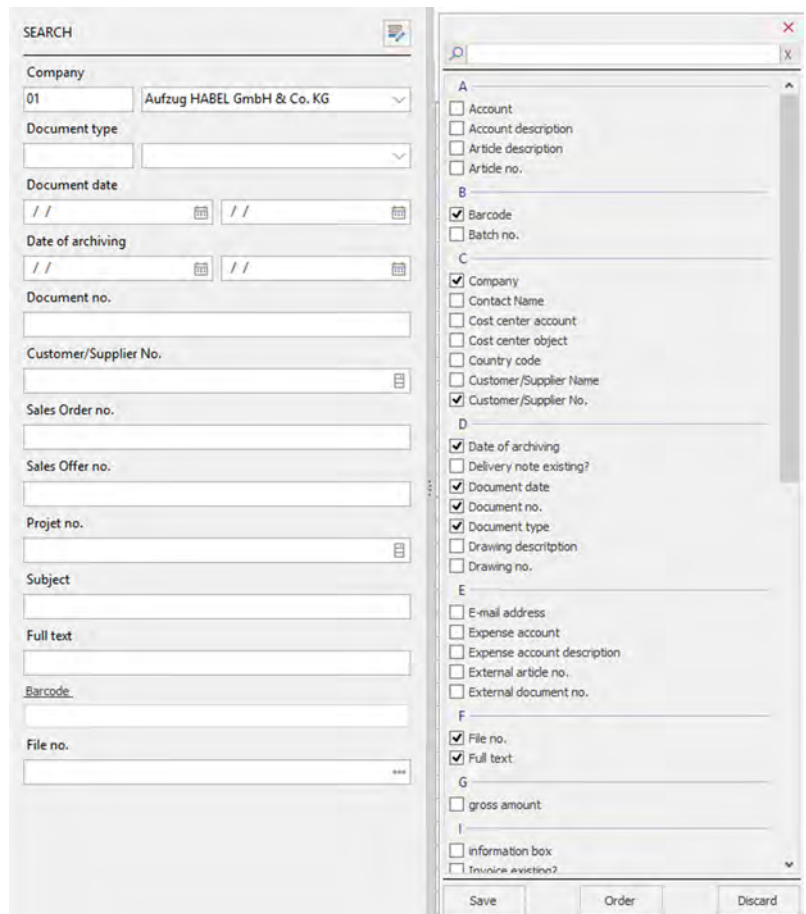


Fig. 46: Search parameter

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

The screenshot shows a search interface titled "SEARCH" with a search icon in the top right corner. The form contains the following fields and controls:

- Company:** A text input field containing "01" and a dropdown menu showing "Aufzug HABEL GmbH & Co. KG".
- Document type:** A text input field and a dropdown menu.
- Document date:** Two date input fields, each containing " / /" and a calendar icon.
- Date of archiving:** Two date input fields, each containing " / /" and a calendar icon.
- Document no.:** A text input field.
- Customer/Supplier No.:** A text input field with a list icon on the right.
- Sales Order no.:** A text input field.
- Sales Offer no.:** A text input field.
- Projet no.:** A text input field with a list icon on the right.
- Subject:** A text input field.
- Full text:** A text input field.
- Barcode:** A text input field.
- File no.:** A text input field with a list icon on the right.

Fig. 47: Search (example)

Selection boxes

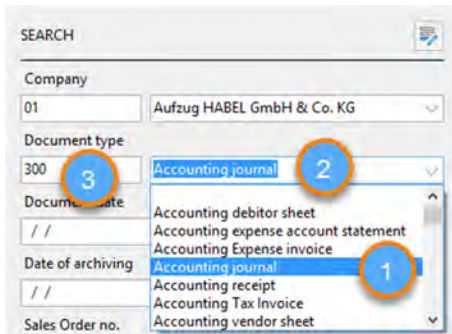


Fig. 48: Selection boxes

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 type-dependent 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

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.

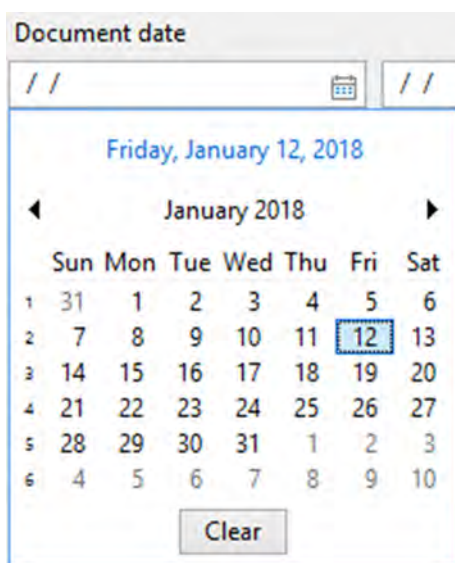



Fig. 49: Date selection

Table 2: Date settings

Input	Result
. (period)	Today's date
+1, +2, +3, -1, -2, -3 etc.	Today's date +1 day, +2 days, +3 days, -1 day, -2 days, -3 days etc.
1+, 2+, 3+	1st, 2nd, 3rd day of the current month/year
01, 02, 03	1st, 2nd, 3rd day of the current month/year (only for from-until 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

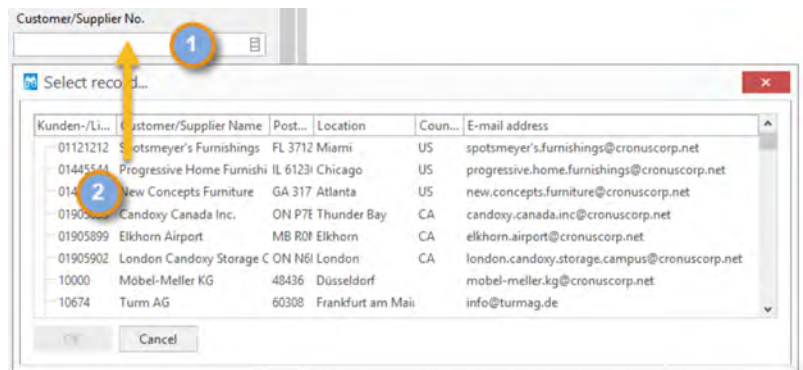


Fig. 50: Master data access

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.

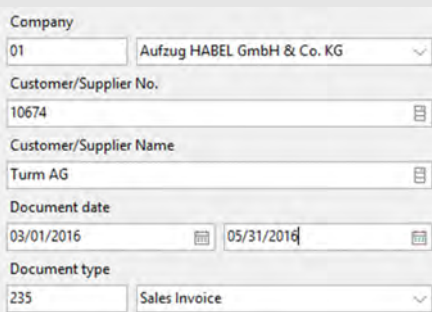
3.3.2.1 Index search and full text search

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:



The screenshot shows a search form with the following fields and values:

- Company:** 01 (input), Aufzug HABEL GmbH & Co. KG (dropdown)
- Customer/Supplier No.:** 10674 (input)
- Customer/Supplier Name:** Turm AG (input)
- Document date:** 03/01/2016 (calendar icon), 05/31/2016 (calendar icon)
- Document type:** 235 (input), Sales Invoice (dropdown)

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:

The screenshot shows a search form with the following fields and values:

- SEARCH** (header)
- Company:** Input field with '01', dropdown menu with 'Aufzug HABEL GmbH'.
- Document date:** Two date input fields, each with '//' and a calendar icon.
- Customer/Supplier No.:** Empty input field with a list icon.
- Date of archiving:** Two date input fields, each with '//' and a calendar icon.
- Project no.:** Empty input field with a list icon.
- Sales Order no.:** Empty input field.
- Document type:** Input field with a dropdown arrow.
- Net amount:** Empty input field.
- Subject:** Input field with '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.

Fig. 52: Log

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: The term is only a part of the term being searched for e.g. user* brings up user manual, user rights etc.
?	Wildcard for individual letters or characters.

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.

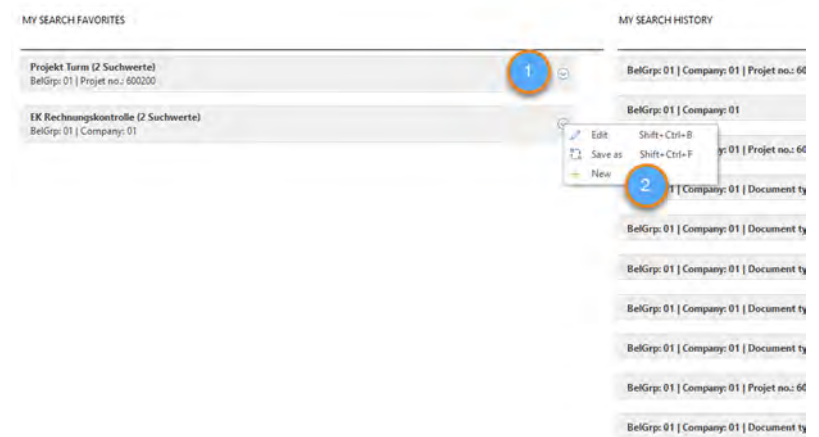


Fig. 53: Search favorites

- 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

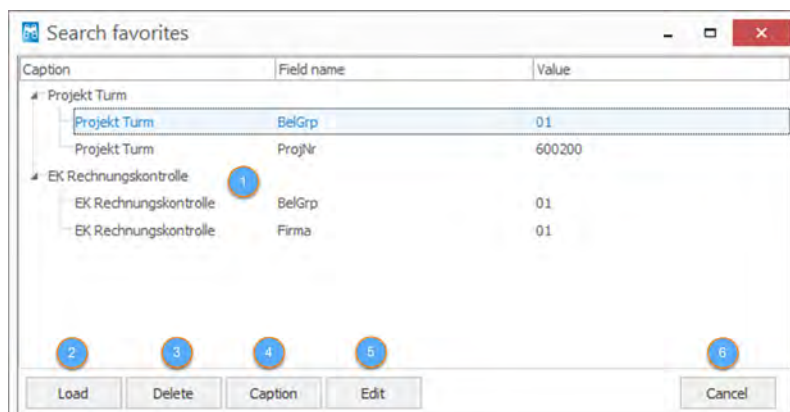


Fig. 54: Edit search favorites

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

Caption	Function
[Load] button	When this button is activated, the current settings 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 values with variable values. This function is very useful for e.g. date fields. It lets you display a particular data range starting from the current day.
[Cancel] button	When this button is activated, the editing is canceled.

Replace search favorites

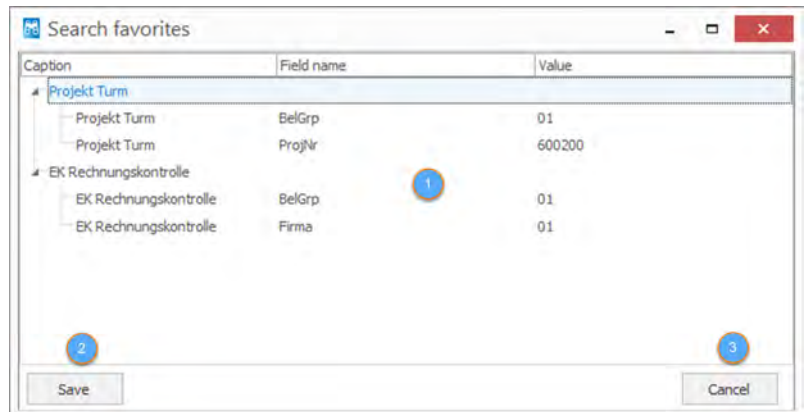


Fig. 55: Replace search favorites

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

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

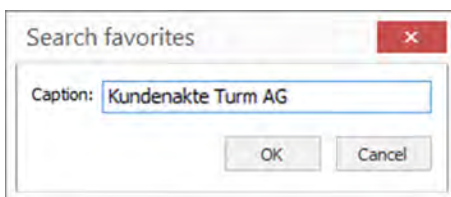


Fig. 56: Create search favorite

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

Example

Show all documents created in the last 7 days.

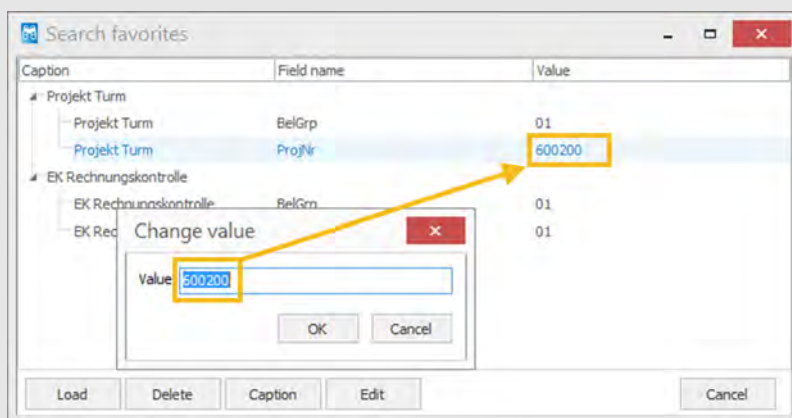


Fig. 57: Example of editing search favorites

To configure this setting, the values are overwritten in editing mode with -7 and |. and then saved.

-7 stands for minus 7 days, |. stands for today.

3.5 Search history



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)*”.

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.

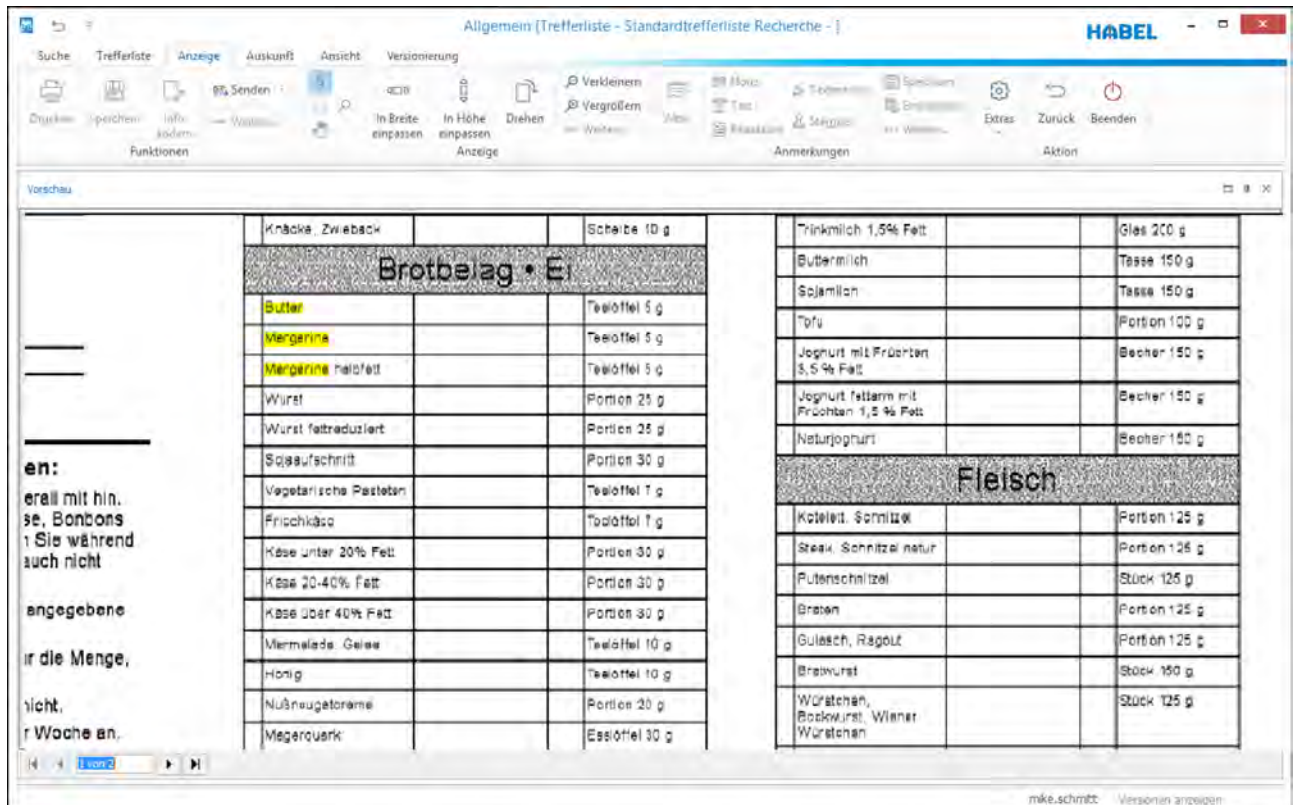


Fig. 59: Synonym search

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 LDO-Laufwerk
0014	EK Bestellung	02.07.2009	10797	Plasmon LDO-Laufwerk
0012	EK Anfrage	29.06.2009	10796	UDO-Jukebox Plasmon
0014	EK Bestellung	03.07.2009	10796	UDO-Jukebox Plasmon
0013	EK Angebot	01.07.2009	10796	UDO-Jukebox Plasmon G24-1
0015	EK Auftragsbestätigung	08.07.2009	10796	UDO-Jukebox Plasmon G24-1
0017	EK Lieferschein	14.07.2009	10796	UDO-Jukebox 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:

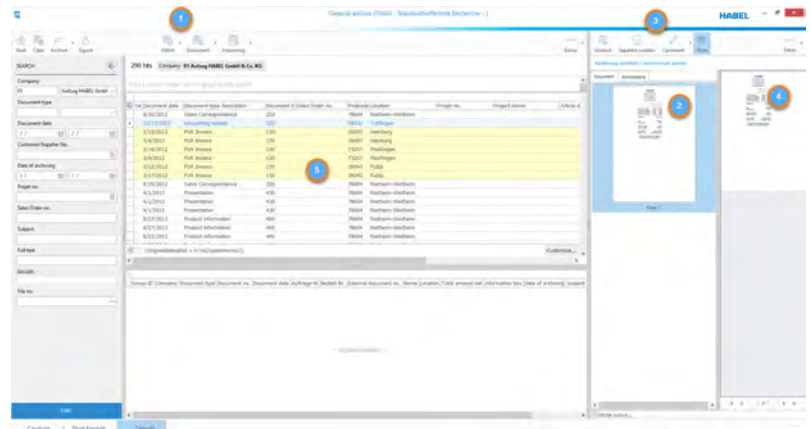


Fig. 60: Hitlist

- 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

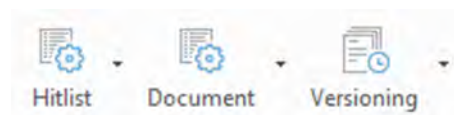


Fig. 61: Command bar—Hitlist

4.1.1 Hitlist

Hitlist

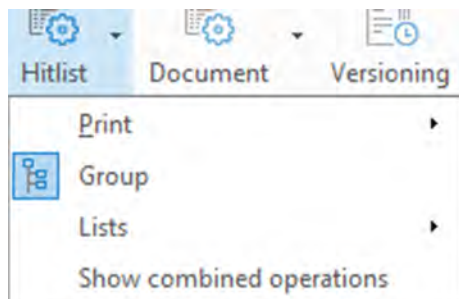


Fig. 62: Hitlist menu

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

“Hitlist → Lists → Delete document type setting”	Settings dependent on the document types are deleted here.
“Hitlist → View process chains”	When this is activated or deactivated, the process chain is displayed or hidden ↪ Chapter 4.3.1 “Process chains” on page 72.

4.1.2 Document

Document

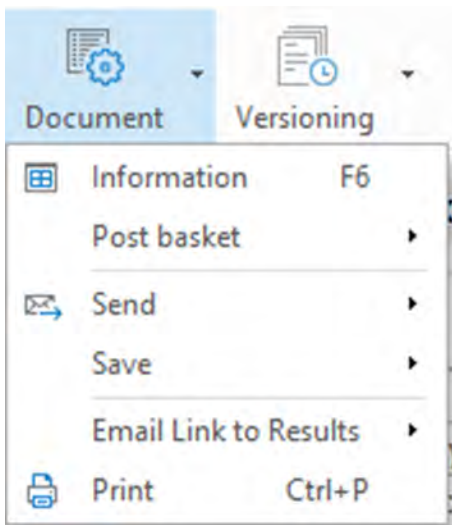


Fig. 63: Document menu

“Document → Information”	When this is activated, the document information is opened ↪ Chapter 6 “Document information” on page 83.
“Document → Post basket → Generate entry”	A post basket entry is generated upon activation.
“Document → Post basket → View history”	↪ “Post basket” on page 68
“Document → Send → Send as attachment”	The current document is sent as an attachment (in original format). ↪ “More information about sending” on page 60
“Document → Send → Send as PDF”	The current document is sent as a PDF file ↪ “More information about sending” on page 60.
“Document → Save → Save as attachment”	The current document is saved as an attachment (in original format).
“Document → Save → Save as PDF”	The current document is saved as a PDF file.
“Document → E-mail link to results → Send link to procedure”	↪ “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 → 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.

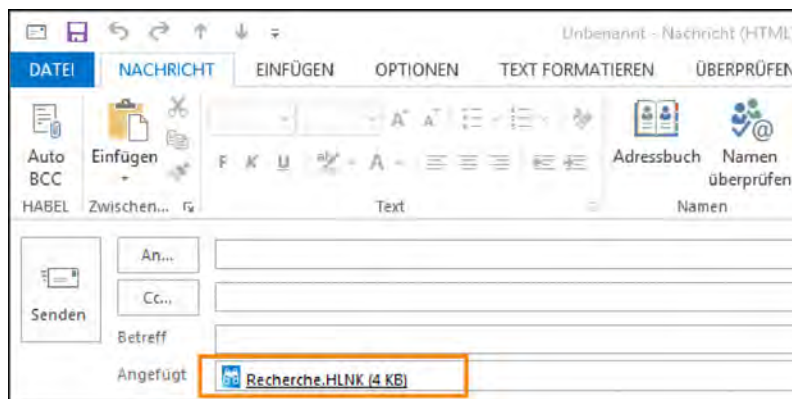


Fig. 64: E-mail link to procedure

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 → Send”. You can then choose from the following commands:

- Send as attachment
- Send as PDF

Send as attachment - Sends the displayed hit as an e-mail attachment.

Send as PDF - Sends the displayed hit as an e-mail attachment 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

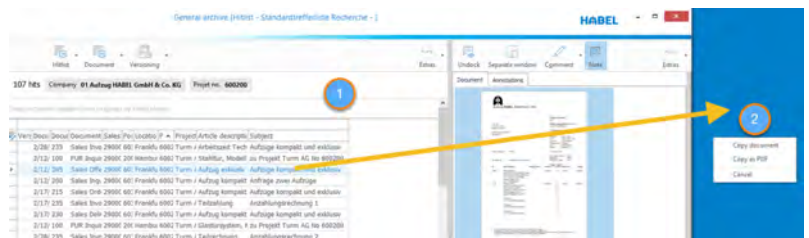


Fig. 65: Saving with drag & drop

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

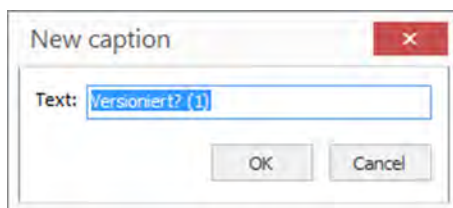


Fig. 66: Caption for column

You can format the caption of the respective column here.

Alignment



Fig. 67: Column alignment of hitlist

Specify how the content of the column should be aligned.

Merge cells

Versioniert	Document date	Document	Document-type descriptio	Sales Order
	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

Fig. 68: Merge

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.

Fit to width

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

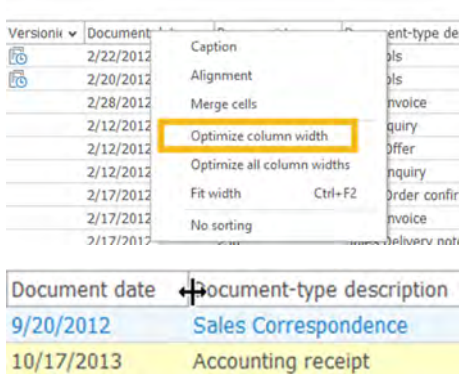
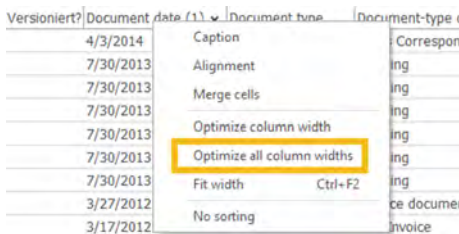


Fig. 69: Adjust columns

Optimize all column widths



Cancel sorting

4.2.3 Group

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.

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.

i The grouping can be activated or deactivated in the menu "Hitlist → Group" & "Hitlist" on page 58.

Version	Document type	Document date	Document-type description	Sales Order no.	Postcode	Location	Projekt n./Project liq	Article description	Subject
115	2/15/2012	PUR Order confirmation	290001	73207	Flochingen	600200	Turm AG	Boden Parkett	
115	2/15/2012	PUR Order confirmation	290001	73207	Flochingen	600200	Turm AG	Boden Teppich	
215	2/17/2012	Sales Order confirmation	290001	60308	Frankfurt am M	600200	Turm AG	Aufzug kompakt	Aufzüge kompakt u
230	2/17/2012	Sales Delivery note	290001	60308	Frankfurt am M	600200	Turm AG	Aufzug kompakt	Aufzüge kompakt u
235	2/17/2012	Sales Invoice	290001	60308	Frankfurt am M	600200	Turm AG	Teilzahlung	Anzahlungsrechnun

Fig. 70: Group

The result of the grouping appears as follows:

Document type	Versioniert?	Document date	Document-type description	Sales Order no.	Postcode	Location	Projekt n/Project Na/Article description
Document type : 215 Sales Order confirmation (3)							
		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 Hochhaus G 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	Document	Document-type
2/12/2012	110	PUR Order
3/9/2012	130	PUR Invoice
3/5/2012	125	PUR Delivery no

Fig. 72: Fit width

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.

4.2.5 Adjust columns

Document type	Versioniert?	Document date	Document-type description	Projek no.	Postcode	Location	Project Name
	<input type="checkbox"/>	Annotation Nr.	<input type="checkbox"/> Expense account	<input checked="" type="checkbox"/> Projekt no.			
	<input type="checkbox"/>	Approval date 1	<input type="checkbox"/> Expense account description	<input type="checkbox"/> PUR Blanket order no.		amburg	Turm AG
	<input type="checkbox"/>	Approval date 2	<input type="checkbox"/> External article no.	<input type="checkbox"/> PUR Delivery note no.		amburg	Turm AG
	<input type="checkbox"/>	Archival Time	<input type="checkbox"/> External document no.	<input type="checkbox"/> PUR Inquiry no.		lida	Turm AG
	<input checked="" type="checkbox"/>	Article description	<input type="checkbox"/> File extension	<input type="checkbox"/> PUR Invoice/Credit note no.		lida	Turm AG
	<input type="checkbox"/>	Article no.	<input type="checkbox"/> File no.	<input type="checkbox"/> PUR Order no.		lida	Turm AG
	<input type="checkbox"/>	Attachment	<input type="checkbox"/> Formular	<input type="checkbox"/> Quantity		ochingen	Turm AG
	<input type="checkbox"/>	Attachment Counter	<input type="checkbox"/> gross amount	<input type="checkbox"/> RwiAbmKz		ochingen	Turm AG
	<input type="checkbox"/>	Barcode	<input type="checkbox"/> HABEL Pos. ID	<input type="checkbox"/> Sales Blanket order no.		ochingen	Turm AG
	<input type="checkbox"/>	Batch no.	<input type="checkbox"/> HABEL Pos. SN	<input type="checkbox"/> Sales Delivery note no.		ochingen	Turm AG
	<input type="checkbox"/>	Clearance 1	<input type="checkbox"/> information box	<input type="checkbox"/> Sales Invoice/Credit note no.		lida	Turm AG
	<input type="checkbox"/>	Clearance 2	<input type="checkbox"/> Invoice existing?	<input type="checkbox"/> Sales Offer no.		ochingen	Turm AG
	<input type="checkbox"/>	Clearance Employee 1	<input type="checkbox"/> Kunden-/Lieferanten Nr.	<input checked="" type="checkbox"/> Sales Order no.		amburg	Turm AG
	<input type="checkbox"/>	Clearance Employee 2	<input checked="" type="checkbox"/> Location	<input type="checkbox"/> Scan/Cold		amburg	Turm AG
	<input type="checkbox"/>	Company	<input type="checkbox"/> Loginname	<input type="checkbox"/> Serial no.		lida	Turm AG
	<input type="checkbox"/>	Complaint no.	<input type="checkbox"/> Managed	<input type="checkbox"/> Sha1		ochingen	Turm AG
	<input type="checkbox"/>	Conversion-Flag	<input type="checkbox"/> Master ID	<input type="checkbox"/> Single price		amburg	Turm AG
	<input type="checkbox"/>	Cost center account	<input type="checkbox"/> Mehrwertsteuer 8%	<input type="checkbox"/> Sub Document Type		lida	Turm AG
	<input type="checkbox"/>	Cost center object	<input type="checkbox"/> Message Attachment ID	<input type="checkbox"/> Subject		ochingen	Turm AG
	<input type="checkbox"/>	Country code	<input type="checkbox"/> Message ID	<input type="checkbox"/> Subsidiary		amburg	Turm AG
	<input type="checkbox"/>	Currency code	<input type="checkbox"/> Net amount	<input type="checkbox"/> Terms of payment		amburg	Turm AG
	<input type="checkbox"/>	Customer/Supplier Name	<input type="checkbox"/> OCR	<input type="checkbox"/> Total Cost		amburg	Turm AG
	<input type="checkbox"/>	Date of archiving	<input type="checkbox"/> Offer existing?	<input type="checkbox"/> Total pages		lida	Turm AG
	<input type="checkbox"/>	Delivery note existing?	<input type="checkbox"/> Order confirmation existing	<input type="checkbox"/> Value added tax		lida	Turm AG
	<input checked="" type="checkbox"/>	Document date	<input type="checkbox"/> Order existing?	<input type="checkbox"/> Value added tax 0%		ochingen	Turm AG
	<input type="checkbox"/>	Document no.	<input type="checkbox"/> Originaldateiname	<input type="checkbox"/> Value added tax 19%		ochingen	Turm AG
	<input type="checkbox"/>	Document Rotation	<input type="checkbox"/> Originaldateipfad	<input type="checkbox"/> Version Outdated		ochingen	Turm AG
	<input type="checkbox"/>	Document type	<input type="checkbox"/> Page No.	<input checked="" type="checkbox"/> Versioniert?		amburg	Turm AG
	<input checked="" type="checkbox"/>	Document-type description (1)	<input type="checkbox"/> Pagecount	<input type="checkbox"/> Wormnummer		amburg	Turm AG
	<input type="checkbox"/>	Drawing description	<input checked="" type="checkbox"/> Postcode			amburg	Turm AG
	<input type="checkbox"/>	Drawing No.	<input checked="" type="checkbox"/> Project Name				

Fig. 73: Column selection

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

Change column order

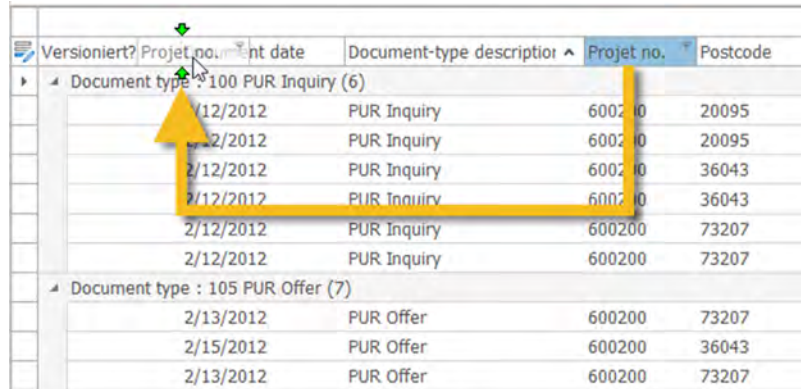


Fig. 74: Change column order

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

Use column context menu

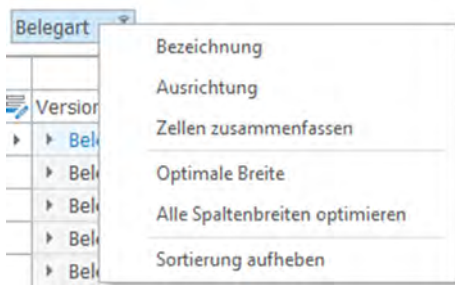


Fig. 75: Column context menu

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-aligned, right-aligned or centered. This setting 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 columns.

Filter columns

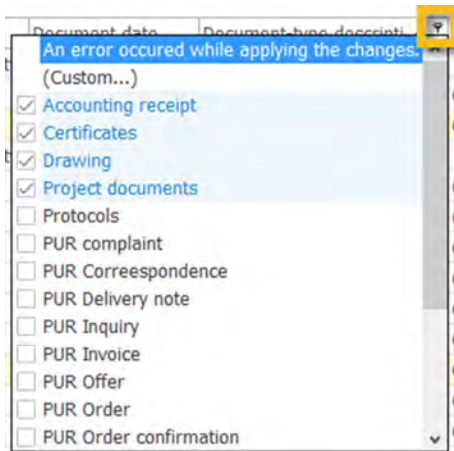


Fig. 76: Filter selection

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 hitlist. ↪ “Settings → Hitlist” on page 29

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.

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

Modify filter settings



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.



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

Versior	Document	Documer	Document-type description (1)	Sales Orc	Postc
		425	Certificates		2009;
		425	Certificates		6030t
		425	Certificates		6030t
		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.

Cancel sorting

If you have sorted the hitlist, you can cancel the whole sorting operation of a column. The hits will then be displayed in the list according to the archiving date ☞ *“Use column context menu” on page 64.*

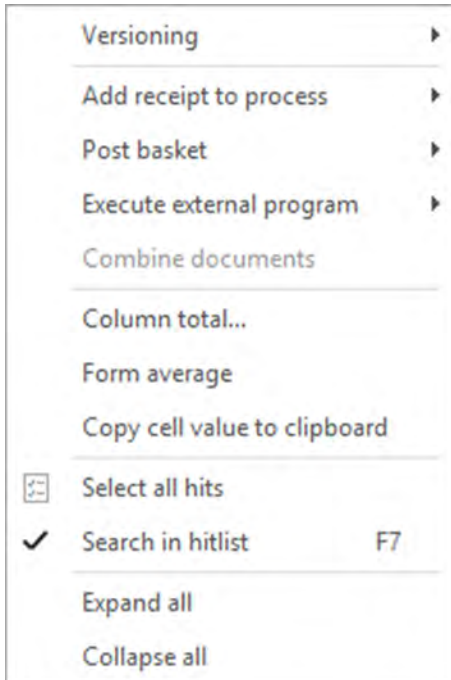
By pressing the *[Ctrl]* key, you can cancel the sorting with a click on the respective column.

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

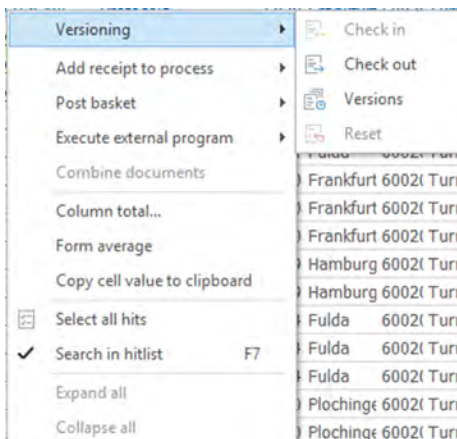
Context “right mouse button”



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

Fig. 80: Hitlist context menu

Versioning



Caption	Description
Check in	↪ Chapter 3.2.2 “Versioning” on page 21
Check out	↪ Chapter 3.2.2 “Versioning” on page 21
Versions	↪ Chapter 3.2.2 “Versioning” on page 21
Reset	↪ Chapter 3.2.2 “Versioning” on page 21

Fig. 81: Versioning context

Post basket

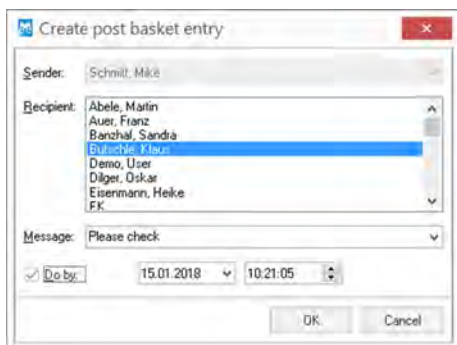


Fig. 82: Create post basket entry

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

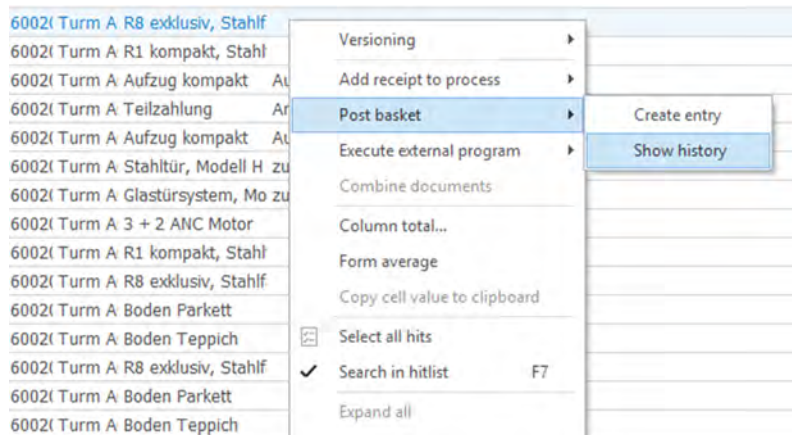


Fig. 83: View history

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.

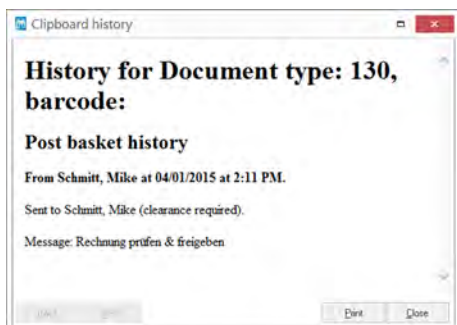


Fig. 84: History

Via the context, use the right mouse button to select “Post basket → View 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.

Document type description	Sales Order no.	Document type	Document date	Postcode	Location	Projekt
Product information	290001	400	2/14/2009	60308	Frankfurt am M	
Product information	290001	400	2/14/2009	60308	Frankfurt am M	
Product information	290001	400	2/14/2009	60308	Frankfurt am M	
▶ Sales Correspondence	290001	255	2/14/2009	60308	Frankfurt am M	
Sales Correspondence	290001			09	60308	Frankfurt am M
Product information	290001			09	60308	Frankfurt am M
Sales Correspondence	290001			09	60308	Frankfurt am M
Product information	290001			09	60308	Frankfurt am M
Sales Correspondence	290001			09	60308	Frankfurt am M
Sales Invoice	290001					
Sales Correspondence	290001					
Product information	290001			09	60308	Frankfurt am M
Sales Correspondence	290001			09	60308	Frankfurt am M
Product information	290001			09	60308	Frankfurt am M
Product information	290001			09	60308	Frankfurt am M
Product information	290001			09	60308	Frankfurt am M
Product information	290001			09	60308	Frankfurt am M
Product information	290001			09	60308	Frankfurt am M
Product information	290001			09	60308	Frankfurt am M
Sales Correspondence	290001			09	60308	Frankfurt am M
Sales Correspondence	290001			09	60308	Frankfurt am M
Product information	290001			09	60308	Frankfurt am M
Product information	290001			09	60308	Frankfurt am M

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.

Combine documents

A combination of the hits is created ↪ Chapter 4.3.1 “Process chains” on page 72.

Column total and Form average

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.

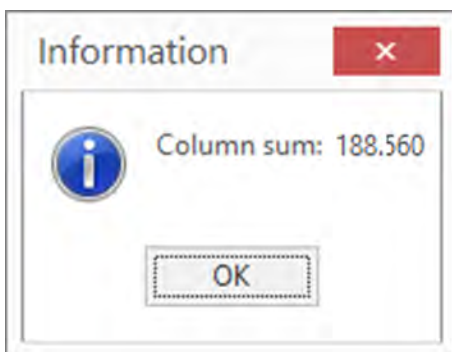


Fig. 86: Column total

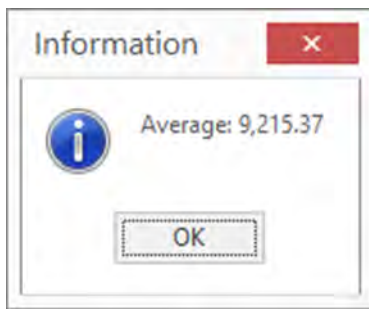


Fig. 87: Form average

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

Copy cell value to clipboard

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

Select all hits

All hits in the hitlist are marked.

The following actions are performed for all marked hits.

Search in hitlist

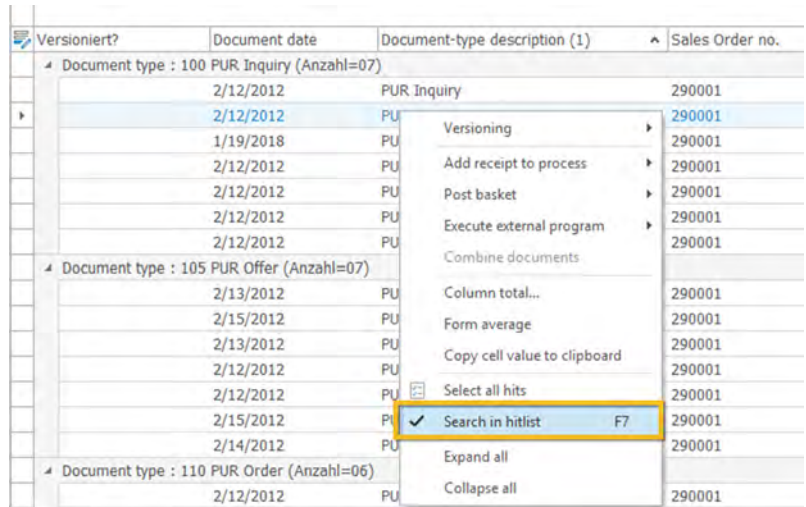


Fig. 88: Search in hitlist

- 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”.

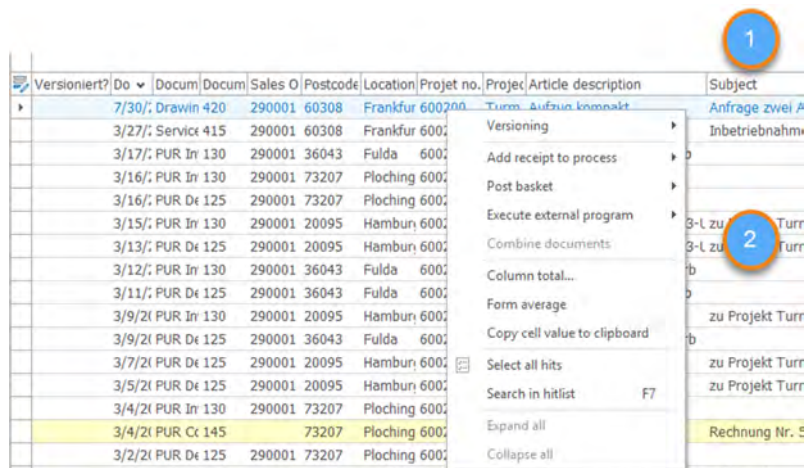


Fig. 89: Columns search in hitlist

- 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).


Example:

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

Expand all

i This function is only available if there is a grouping
 ↳ Chapter 4.2.3 “Group” on page 62.

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.
 - ⇒ 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.

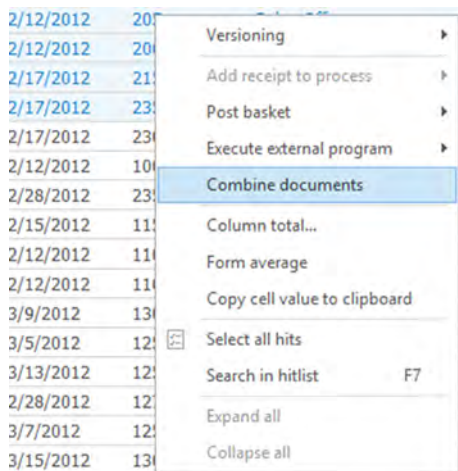


Fig. 90: Combine documents

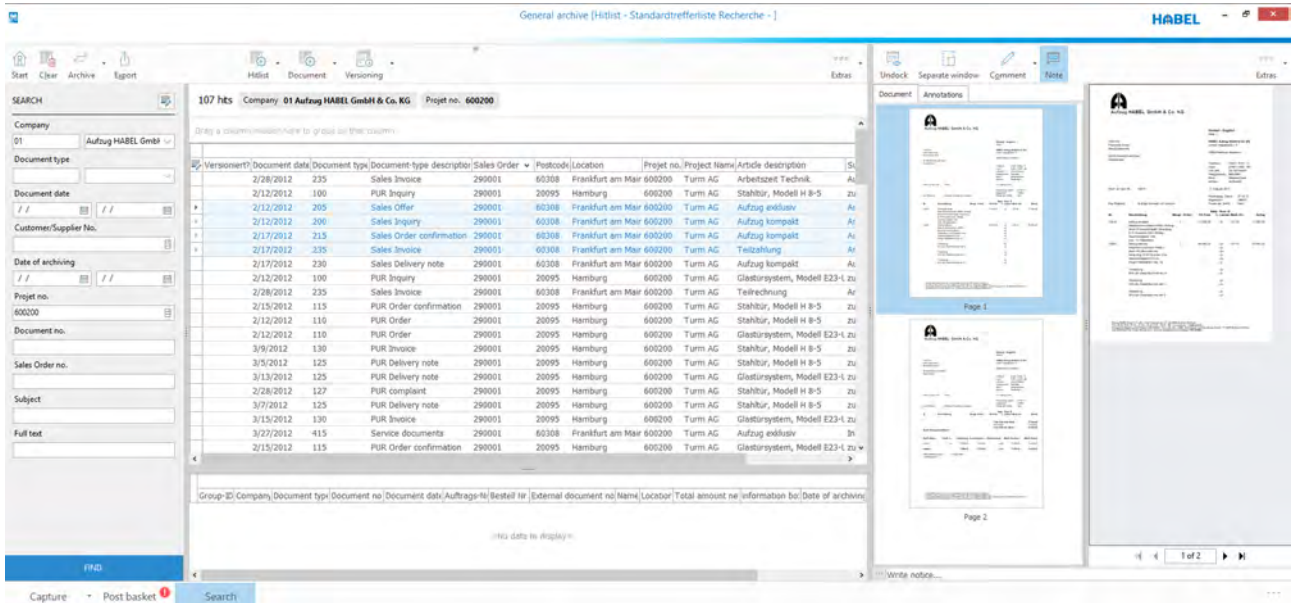


Fig. 91: Combine documents

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.

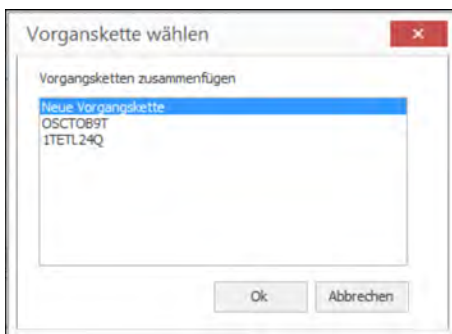


Fig. 92: Join process chains

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.

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.

Examples:

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.

Document type description	Postcor	Sales Order no.	Document type	Document date	Location	Pr
Sales Correspondence	60308	290001	255	2/14/2009	Frankfurt am M	
Sales Correspondence	60308	290001	255	2/14/2009	Frankfurt am M	
Sales Correspondence	60308	290001	255	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			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			2/14/2009	Frankfurt am M	
Sales Correspondence	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			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			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			2/14/2009	Frankfurt am M	
Product information	603			2/14/2009	Frankfurt am M	

Fig. 93: External program

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

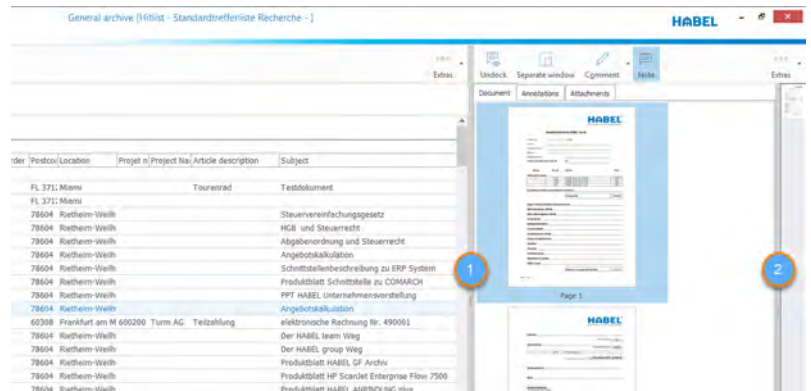


Fig. 94: Activate/deactivate document view and document preview

- 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.

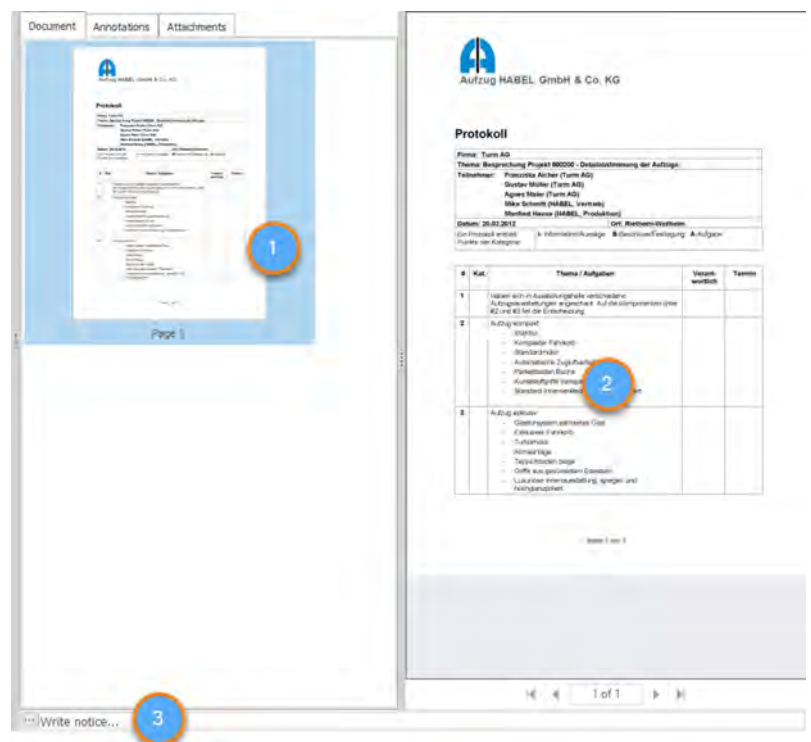



Fig. 95: Document view

- 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



Fig. 96: Document view area

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. 97: Zoom within the document view

Use the zoom function to display parts of the document in more detail.



Zoom in/zoom out

Document is enlarged or reduced in the document preview.



Rotate

Document is rotated.

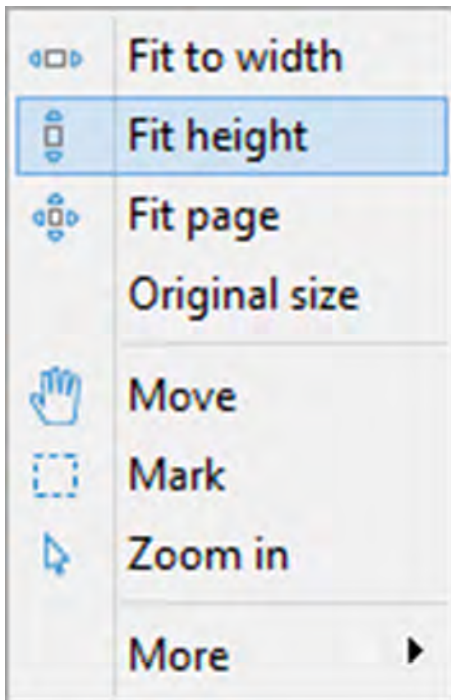


Fig. 98: More

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 document upwards or downwards in the display if the document is bigger than the screen size. Click in the document and move the cursor up or down while holding down the mouse button.
Mark	There are two different functions: <ul style="list-style-type: none"> ■ You can add a border around text by clicking "Mark". As soon as the left mouse button is released, the text content is already copied into the clipboard! ■ If this is subsequently copied with [Ctrl] + [C], an image section is copied from the marked area to the clipboard.
Zoom in	You can enlarge areas in the document view using the cursor. To do this, hold down the mouse button and drag a frame around the area to be enlarged. When you release the mouse button, this area will be 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 → 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 [Ctrl] + [C]. (Only for documents that were read with HABEL-FULLTEXT).

5.1 Command bar — Document preview

Undock

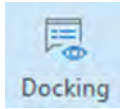


Fig. 99: Undock

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

Separate window

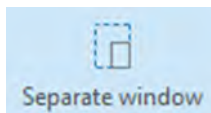


Fig. 100: Separate window

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

Annotation

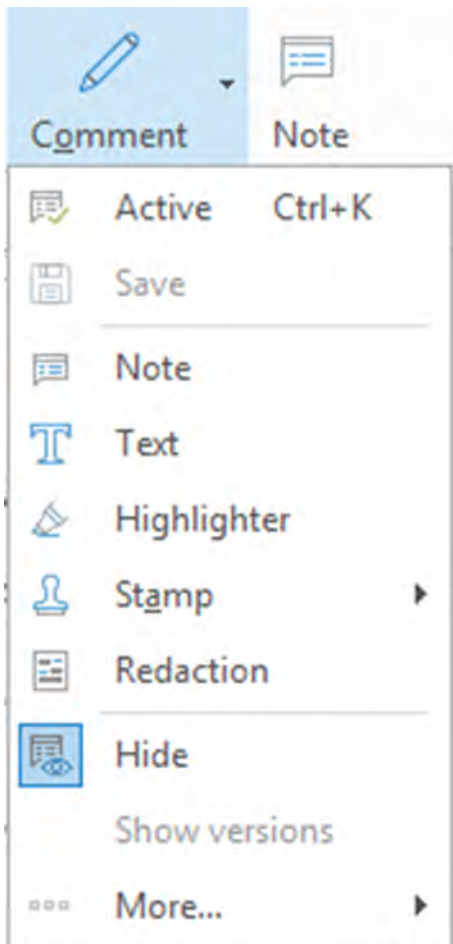
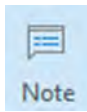


Fig. 101: Annotations

“Annotation → 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 “Right-click → Edit”. You can now change annotations provided that you have the corresponding rights. During deactivation, you will be asked whether you would like to save the edits you made.
“Annotation → Save”	All annotations that are added to the document must be saved. If you do not save them, a confirmation prompt appears.
“Annotation → Note”	After clicking the symbol, you can add notes. To do this, hold down the mouse button and drag a frame on the document. The note is preallocated with your name and the capture date and ready to capture the information.
“Annotation → Text”	If you only want to add text passages to the document, you can create free text with this function.
“Annotation → 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. Highlighting in the context menu: Foreground color changes the font color, background color changes the fill color.

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

Note



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.

Fig. 102: Note

More

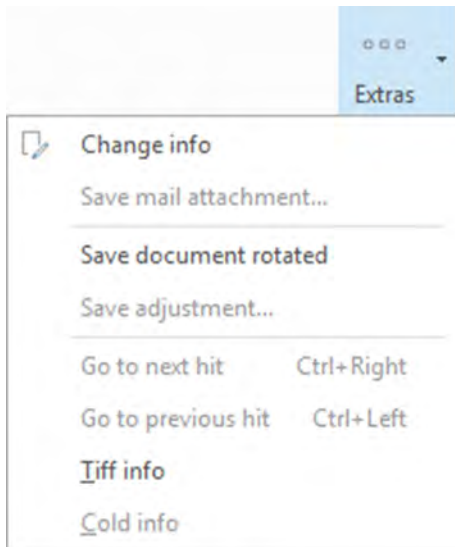


Fig. 103: Document information More

“More → Change info”	For sending the document by e-mail (↪ Chapter 4.1.2 “Document” on page 59). If you have defined within the settings (mail settings ↪ “Settings → Mail settings” on page 35) that a page selection is to be displayed, a prompt will appear for multi-page documents asking which pages are to be included in the e-mail as attachments.
“More → Save attachments...”	The attachments are saved.
“More → Save document rotated”	Rotated procedures can be saved in this state.
“More → Save adjustment...”	Adjustments can be saved. You can also save on a document-dependent basis. After saving, the following prompt appears: This setting can be undone with the <i>[Delete]</i> button.
“More → Go to next hit”	The next hit is shown.
“More → Go to previous hit”	The previous hit is shown.
“More → TIFF info”	Opens the information for the TIFF file ↪ “TIFF info and Cold info” on page 80.
“More → Cold info”	Opens the information for the text files ↪ “TIFF info and Cold info” on page 80.

TIFF info and Cold info

Example (based on TIFF info):

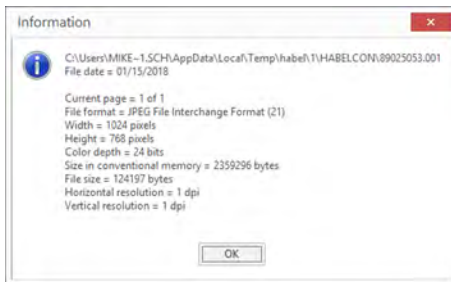


Fig. 104: TIFF info

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

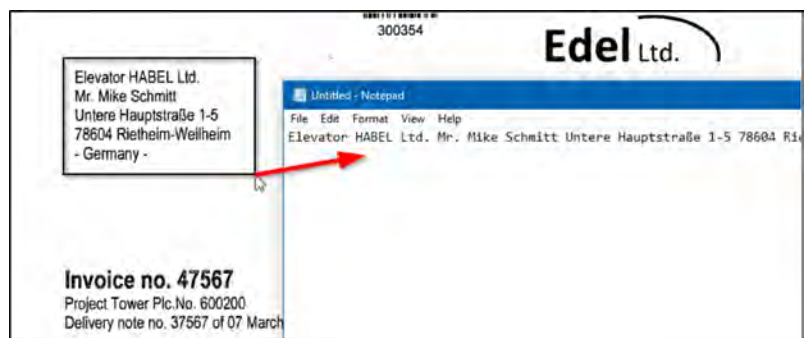


Fig. 105: Copy document contents

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.

Company	01	Aufzug HABEL GmbH & Co. KG
Document type	130	PUR Invoice
Document date	03/12/2012	
Date of archiving	11/18/2013	
Customer/Supplier No.	30001	
Customer/Supplier Name	Novadyn Antriebstechnik GmbH	
Project no.	600200	
Project Name	Turm AC	
Document no.	85926	
Subject		
Full text		
Einkauf		
PUR Inquiry no.	590001	
PUR Order no.	680001	
PUR Delivery note no.	75052	
PUR Invoice/Credit note	85926	
Verkauf		
Sales Offer no.	190001	
Sales Order no.	260001	
Sales Delivery note no.	390001	
Sales Invoice/Credit note	490001	
Fiktiv		
External document no.	85926	
gross amount	1233913.00	
Net amount	1038181.00	
Expense account		
Expense account descrip...		

Qualitätsmanagement	
StoerStige Sachverhalte	
Contact Name	
Location	Fulda
Postcode	36043
E-mail address	info@novadyn.de
Message ID	
File no.	100166
Country code	
Barcode	274154
Batch no.	
Seller / Purchaser	
Serial no.	
External article no.	
Article description	R1 kompakt, Stahlfederschub
Article no.	10015
Offer existing?	
Order confirmation exist...	
Delivery note existing?	
Order existing?	
Invoice existing?	
information box	

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 → 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.



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

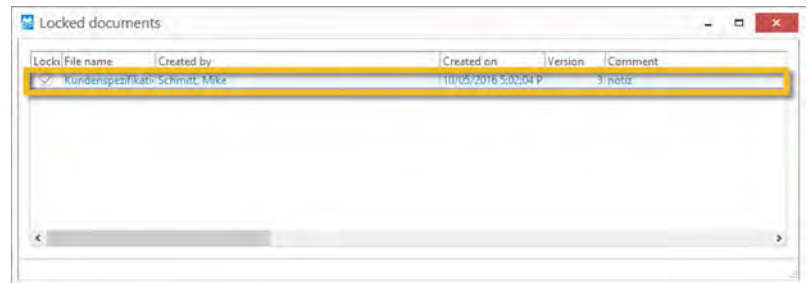


Fig. 108: Overview of locked documents

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.



Fig. 109: Comment on changes

To view version information such as the version number, click on “Versioning → Versions”.

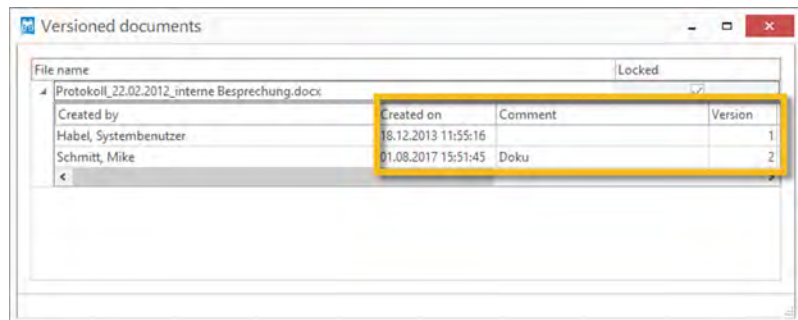


Fig. 110: Versioned documents

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 (🕒) or has already taken place (📁).

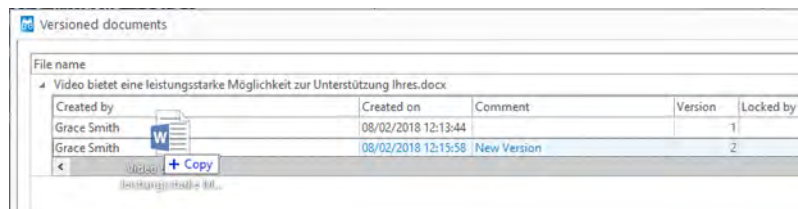


Fig. 111: Archiving with drag & drop

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



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

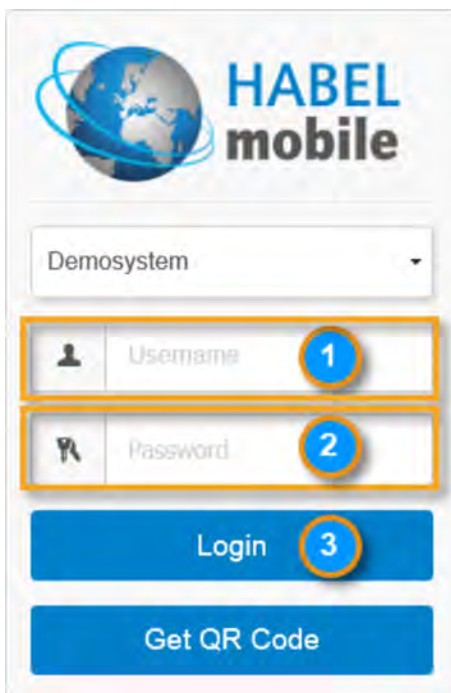
Program	Function	
All	Print	[Ctrl] + [P]
All	Back	[Esc]
Retrieval	Master data access	[Ctrl] + [L]
Retrieval	Start search	[Ctrl] + [F]
Retrieval	Search history (forward, backward)	[Alt] + [arrow keys]
Retrieval	Open information	[F6]
Retrieval	End search	[Alt] + [F4]
Retrieval	Help	[F1]
Retrieval	Overview 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 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:

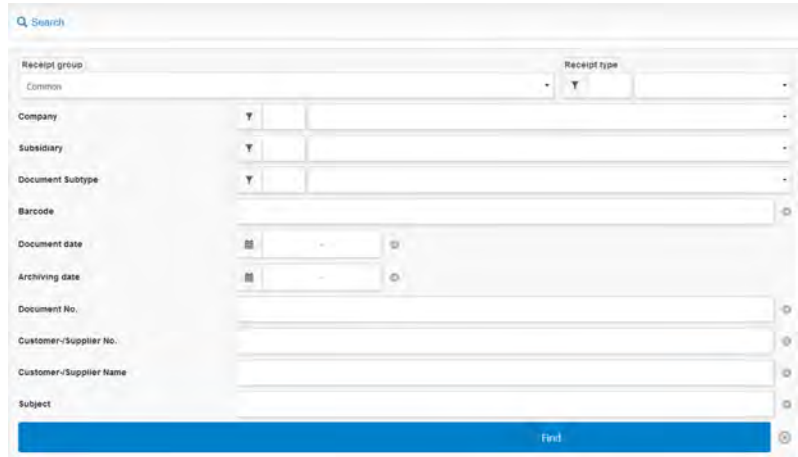


Fig. 113: Display on a notebook with web browser

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

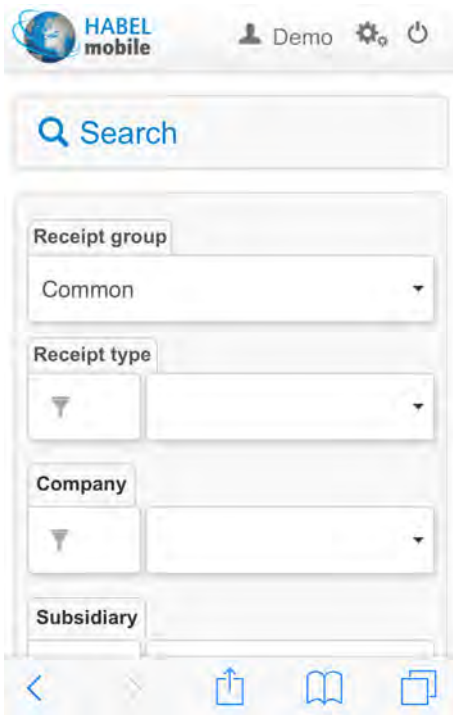
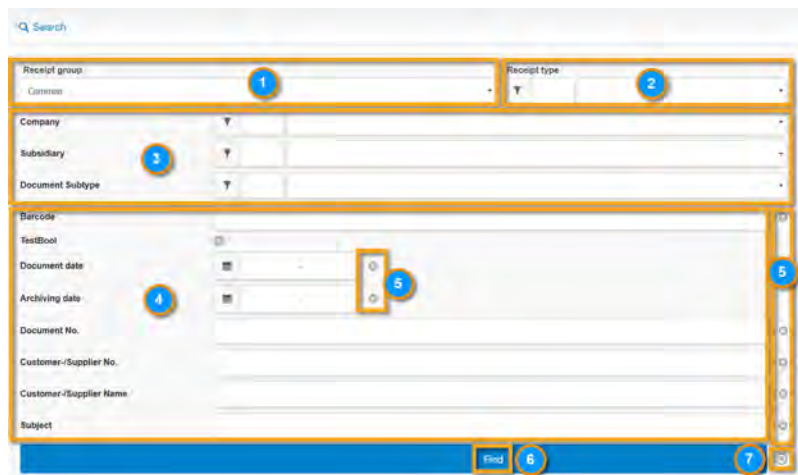


Fig. 114: Display on a smartphone



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

Item	Caption	Description
6	[Find] button	The search is started based on the values entered — the hitlist opens.
7	Delete all entries	Selecting “X” 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:

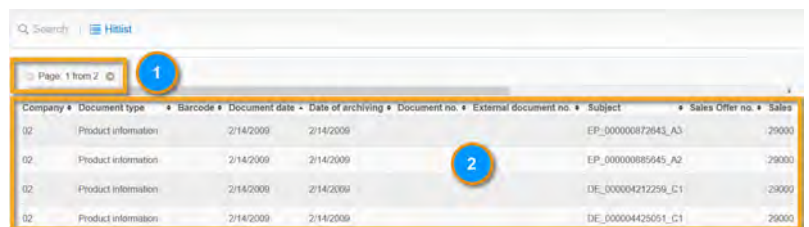
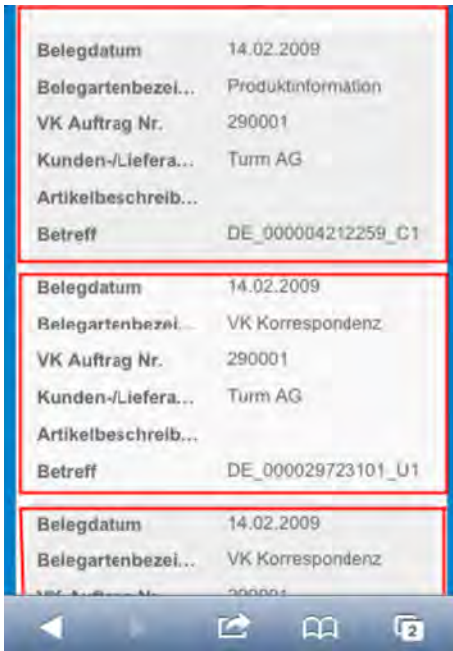


Fig. 115: Display version 1

Item	Caption	Description
1	Change sorting order	Selecting the arrows initiates sorting based on the search criterion in ascending or descending order
2	Scroll	The number of hits shown on a page is limited to a preset number — selection of the arrows to scroll from page to page.

Display version 2:



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

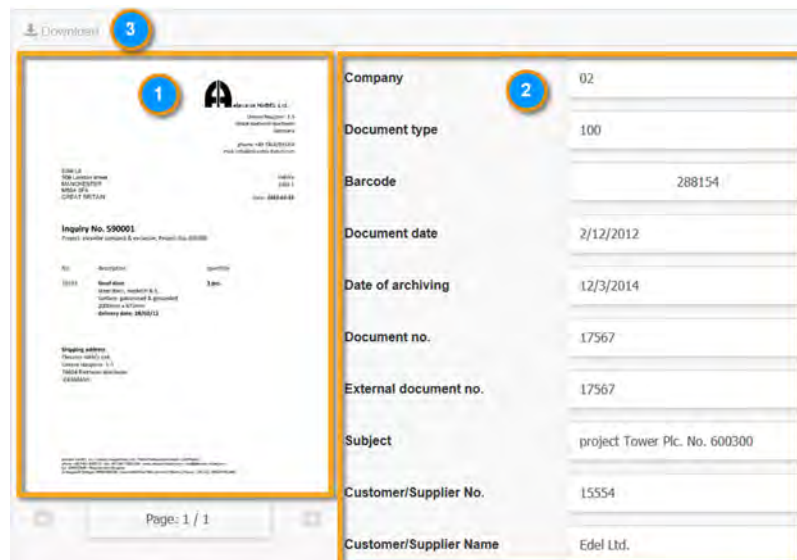


Fig. 117: Display version 1

Item	Caption	Description
1	Document view	Display of the document — The document is displayed in full 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 document 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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