

User Manual

II. Retrieval



Overview

The content of this user manual is directed specifically at users who archive, search, retrieve and manage documents using HABEL. The manual provides detailed instructions regarding the use of the system and its user interfaces. The necessary background information and definitions are also provided for better comprehension. In addition, we offer further support via a wide range of training courses at HABEL or on your own premises.

Syntax conventions used in this manual

Representation	Meaning
HABEL ANNOTATIONS	Indication that the function described here constitutes an additional module that may possibly not be included in the scope of the system.
	A symbol is used to denote (warning) instructions and/or information to be observed.
Ĩ	A symbol is used to denote background information and tips.

Discrepancies

The screenshots may differ in detail from your HABEL[®] document management program, as functions may be included that have not been purchased and/or activated for your system. Generally it is easy to add to your system. Please contact your consultant for details.

Note

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Liability and warranty

This manual has been compiled and checked with the greatest possible care. However, the possibility of errors cannot be completely excluded. HABEL does not accept any legal responsibility, liability or warranty for incorrect information and the consequences thereof.

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User manual II. Retrieval General

General

Without doubt the Retrieval plays a central role in the HABEL[®] document management system. You can use this program to retrieve documents (i.e. search for and locate documents) that have been saved in your archive over the years. It does not matter whether the documents have been saved on the server or on media such as WORM, Blu-ray, etc. Depending on your system configuration various search methods are available in addition to the standard search function, e.g. multi-database search, if your system comprises several databases, or also a full text search, if **HABEL FULL TEXT** is included in your system.

The documents in the hit list can be displayed, printed, edited or emailed, to name just a few of the options available. This also depends on your system configuration and access rights.

Menu/tool bar or multi-function bar (ribbon)

Depending on user the *Extras* – *Settings* menu can be used to define whether access to commands will be via menu and toolbars or using a multifunction bar (ribbon).



Menu/tool bar



Multi-function bar (ribbon)



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For displaying the functions within this manual, the multi-function bar (ribbon) is used by default.



The advantage of the ribbon is that it is context-sensitive (i.e. the active commands are those that can currently be used). In addition, the important commands are immediately accessible by clicking on them.

To switch from main menu/toolbar version to multifunction bar (ribbon), select *Extras* – *Settings* in the menu bar.



The following menu appears in which you can define that the multifunction bar (ribbon) is to be displayed.

Settings ▷ · General ▷ · Display	Style
···· Hit list ▷ · Print settings ···· Mail settings ▷ Style	Presentation Ribbon
	Available skins Office2007Blue

Click on the multifunction bar (ribbon) and close the search. The next time you start the search, the multifunction bar (ribbon) version will be displayed.

Within the ribbon interface you can find the command for switching to the menu / tool bar within *all* tabs – Action – Extras.



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Using shortcut keys

Within the ribbon user interface commands can also be accessed via shortcut keys:

Pressing the ALT key displays letters in the tabs via which the respective tab and then command can be activated.



Some functions also have shortcut keys CTRL + key or function key (F1, F2 etc.) and can be accessed in this way. Over the shortcut editor within the settings, you can define own shortcut keys. Details about this will be handled in chapter Options/Settings.



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Search mask



Start the Retrieval by double-clicking the icon installed as a link on your desktop. If you do not have the symbol on your desktop speak to your administrator. After starting the application, the search mask appears that has the following layout.

(1) Multi-function bar for all program functions(2) Input fields for search terms





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The multifunction bar consists of tabs, groups and buttons. The respective tab contains the most important functions subdivided into groups in which the respective commands are available as buttons. Depending on the time, the appropriate tab is in the foreground (active):

Example

- 1. While entering the search criteria, the "Search" tab is active.
- 2. After the search is triggered, the hits are displayed, and the Hit list tab is active.
- 3. The "View" tab is active within the document display.
- 4. You can obtain details on the search criteria when the "Information" tab is active.



Search tab

	(G) =		-		Gene	ral [Hit list - Standar	d -]			-			
	Search	Hit list	View	Information									
Show	Informa	ition 6	Save - Send - More	Forward Backward	Fax-Druck	Group Select all hits	Columns	Hit Hit *		More	Extras	Back	Close
			Edit			Set	tings		Documen	t preview		Action	

Hit list tab

(A) (A) =	General [Display]									
Search	Hit list	View 1	nformation							
😓 Print	Sax-Druck	c 🔂	💭 Fit width	🔎 Zoom out	0	I Note	a 🖬	db		
🔒 Save 👻	MEI Send 👻		💭 Fit height	🔊 Zoom in		T Text				
📝 Change info	💿 More 👻	1	Rotate	😳 More 🔻	Active	of Redaction	8 T 💿 -	Extras	Back	Close
Funct	ions		View			Annotations			Action	

View tab

4		(3) =				-	General [Informati	on]					23
	9	Search	Hit list	View	Inform	ation								
	5	6	Q 4	E OF	orward	Save		B	5	٨				
	Print	More	View Ser	d GB	ackward	🛞 Cancel	Change	Delete item	Add item	Extras	Back	Close		
			Information	Ú.							Action			

Information tab



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Docking of windows

The elements of the Retrieval, e.g. the document preview, the hit list, the file directory tree (will be described more detailed in the next chapter) etc. can be arranged individually by drag & drop. Furthermore you can create tabs out of the individual elements.

The following example shows how the document preview is moved in the hit list. The frame on the screen shows, where the preview would be when it was dropped.



Thus the preview can be put on the hit list or alternatively on the left, or right, above or below it.



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In the following example the preview is created as register next to the hit list. For this, the preview is dropped when the frame is displayed as a register.

				Endo	and a second
0009	SLS Invoice	5/26/2009		Zahlung:	Zahlbar innerhals 10 Tagen ohne Alboug
0009	SLS Invoice	3/19/2010			
0009	SLS Invoice	10/22/2008			
0009	SLS Invoice	4/15/2009			HARD, CARRY & C. (1998) A second statement of the seco
0009	SLS Invoice	8/9/2010			tit marannal () waraynaith shipheoperitit Sartaan erib
0009	SLS Invoice	4/15/2008	144		LOFT N N
0009	SLS Invoice	2/3/2009	1979		
0009	SLS Invoice	2/19/2010	Hit list	Preview	
0009	JLJ IIVUICE	12/10/2000	Count fo	ound: 52	
				and a state of the	

Register mark

Register view

The register view is for example interesting in connection with the file directory tree. This way the preview is displayed on one side and the hit list parallel to the file directory tree as registers.

Gentral (Ht hat	Standard Einsteilung Racharching (
Show Clear C	Columns Het Lettings Lettings
Protes 9 x	De cento est
Decision Acting states Vertrected protection post Vertre Acting states Vertrected post of the state of the states of the state of the s	dectory bee U ut) S. Naier GrobH S. Maier GrobH Molt Matter Actives file HobBL, GMBH A Sergmann Software Ring (I) VPlicServer (cf) (II) Cr)
 Arencentell -/O.D. Research of Mercen, to Develop Harden Concentrations used (rout of Mariansanian), and Neuronal Ministration and Annual Marianess in a second second Neuronal Annual Research and Annual Marianess and Annual Neuronal Annual Annual Marianess and Annual Annual Neuronal Annual Annual Annual Marianess and Annual Annual Neuronal Annual Annual Annual Annual Annual Annual Annual Neuronal Annual Annual Annual Annual Annual Annual Annual Neuronal Annual Annual Annual Annual Annual Annual Annual Neuronal Annual Annual Annual Annual Annual Annual Annual Annual Neuronal Annual Annual Annual Annual Annual Annual Annual Annual Neuronal Annual Annual Neuronal Annual Ann	
HE 4 10F4 + HH	Hetas Directories
Court loand 121	



User manual II. Retrieval General

In addition there is the possibility to fold or expand the docked window. Therefore the fixing pin is provided. If the combined view is used (as e.g. in our example) you can expand it by moving the mouse over the field.



All performed docking settings persist over the closing of the Retrieval. If you want to undo the settings, use the menu *Reset docking settings* (*All tabs - Action Group – Extras*). After opening the Retrieval again it appears in the standard view.





User manual II. Retrieval Search

Search

Various options are available for searching dossiers. The starting point is the search mask, which impresses thanks to its simple structure. All users find it easy to navigate. After entering the search terms into the search mask you start the search and access the hit list. The Retrieval function offers a large number of customizable settings to optimize your daily work.

1. Input fields

Search terms are required for searching. Various input fields are available for this purpose. The available search criteria are defined and configured in the system beforehand. The more input fields you complete the more accurate the search. For the search, you can use any number of fields in combination with one another.

There are different types of input fields:

Selection boxes (also known as combo boxes)

In these fields, you can choose from predefined terms (1). To access the selection box click on the arrow at the end of the input field (2). The system has generally not been conceived for input of your "own" terms. Instead of selecting from the list you can also control the selection by entering a term into the field, where the matching term will be displayed. Standard search criteria that come with such selection boxes are e.g. the company, the type of document and the document sub-type. These checkboxes can also be saved in relation to the document type.

In addition, the input field for the checkboxes is divided in two and can therefore also be reached by a document type key (3). Therefore, for the divided input fields you can decide whether to enter the code (if known) or use the selection box. The other field is then completed automatically.

Company	01	HABEL GmbH & Co. KG	~ ·
Document type	0001	SLS Enquiry	(2) - 🗉
Document date		SLS Calculation	<u> </u>
Document No.		SLS Correspondence	
Offer No.		SLS Delivery note	
Order No. (internal)		SLS Enquiry	
Delivery Note No.		SLS Fair report SLS Invoice	15
Invoice No.		SLS Manufacture Document	¥
Company	01	HABEL GmbH & Co. KG	
Document type	0001	3 Enquiry	- WI
Document date			I



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User manual II. Retrieval Search

Date fields

By entering numbers *not* separated by dots you can input an exact date (i.e. 101011 or 10102011) or only parts of a date such as 10??2011 for October 2011 or ????2011 for the entire year 2011 (you do not have to enter the ??, start the input at the point at which the values have to be completed, the ?? will be added automatically).

Document date	10/12/2011	=	Document date	??/10/2011 🔠



In addition there is also the calendar or other aids for the entering of dates:

		•	0	ctob	ber	►	- 10	20	11)	*
. (dot)	Today's data	_	S	М	Т	W	Т	F	s	
+1, +2, +3 etc.	Today's date +1 day, +2 days, +3 days etc.		25 2	26 3	27 4	28 5	29 6	30 7	1 8	
-1, -2, -3 etc.	Today's date -1 day, -2 days, -3 days etc.		9 16	10 17	11 18	12 19	13 20	14 21	15 22	
1+, 2+, 3+ etc.	1st, 2nd, 3rd, etc. day of the current month/year		23 30	24 31	25 1	26 2	27 3	28 4	29 5	
01, 02, 03 etc.	1st, 2nd, 3rd, etc. day of the current month/year (only for from-to fields)		Т	oda	y		C	ear		







Standard fields

In standard fields terms to be searched for are input manually. To do so click in the field, this then becomes active for input. Enter the required term.

Document No.	
Offer No.	
Order No. (internal)	
Delivery Note No.	أريب ومريد ومندو ومنا ومنا ومن



The term entered has to coincide with the term recorded in the archiving process (not case-sensitive). If you are not sure how the term has been written or whether other terms can be contained in the field, use the so-called wildcard search using the placeholder *.

For example: you are looking in the name field for the customer "Miller", and you enter the term "Miller". You only find the hits in which Miller was entered in the name field. However, if you enter Miller*, you will also find, for example, Miller Co., Miller Construction etc. If you put the wildcard in front (i.e. *Miller), you will get all results ending in Miller, e.g. Katz & Miller, Carl Miller etc. By entering *Miller* you will find the documents in which Miller is part of the name (in this example: Miller Co., Miller Construction, Katz & Miller, Carl Miller, Richard Miller Ltd. etc.).

MÜLLER* Name

There is no need to enter the wildcard if the fields have been configured so that the wildcards are added automatically in the background. This is practical for fields that are indexed with freely chosen terms, e.g. the subject field. This function has to be configured by your administrator to apply to all users. Note: Searches using wildcards are more complicated than specific searches and therefore take a bit longer.



The search with placeholders is more complex than the precise search. For this reason is takes a little bit longer. To search empty fields, enter ? in the field. To search fields, which are not empty, enter the placeholder * (the empty fields will then not be displayed).



User manual II. Retrieval Search

Fields with master access

With the additional module HABEL MASTER DATA, you can access external master data from fields. The symbol at the end of the input field tells you whether a master access has been saved for a field.

Customer/Supplier No.	2
Name	13

Click on the symbol after entering the term, in order to access the master file provided externally (e.g. customer master, supplier master, article master). You can alternately use the function key combination CTRL + L. You will reach a selection box with the master data from which you can choose (1).



Fields with checkboxes

So-called Boolean fields (yes or no selection) can be represented by means of checkboxes. If the checkbox is ticked, the search is based on the answer for this field being yes; if the checkbox is not ticked and the background is white, the answer is no. A gray, unticked checkbox is ignored in the search.

Release 1	
Release 2	



User manual II. Retrieval Search

Fields with help function

Fields can also be provided with help functions, so that they there is a more detailed explanation. The content of the help message is to be maintained by the administrator (that means, the help fields are to create client-specific and they are controllable for each document type / field).

Dieses Feld ist für d	lie Prüfung der Verträge rei	wanti		10
Mit Hilfe der Terminen g Kündigung werden.	r Kündigungstermine k ekündigt werden kann. Hi Ismöglichkeiten die Op	innen Sie festlegen, zu welchen erzu muss im Feld rollierende ion <i>siehe Kündigungstermine</i> ausgewählt	t	-
Die Eingabe <i>tt.mm.yyyy</i> falls ei <i>tt.mm.</i> falls ei <i>tt.mm.</i> falls ei <i>tt.mm.</i>	im Feld Kündigungster in fixes Datum eingegeber in Tag und ein Monat jede	mine ist in folgendem Format möglich: n werden soll n Jahres eingegeben werden soll		44944
falls m	hehrere Termine in jedem	Jahr angegeben werden sollen		



User manual II. Retrieval Search

2. Index search and full text search

So-called Boolean fields (yes or no selection) can be represented by means of checkboxes. If the checkbox is ticked, the search is based on the answer for this field being yes; if the checkbox is not ticked and the background is white, the answer is no. A gray, un-ticked checkbox is ignored in the search.

Index search

To perform an index search you enter terms into the various input fields. Fields with no entries are identified as empty and therefore not included in the search. The more fields you complete the more accurate the result. You can combine all input fields with one another (these are "AND" dependencies).

Example 1:

You are looking for all outgoing invoices issued to your client Müller in the period September,12th to October, 12th 2011. To do this select document type outgoing invoices, enter Müller into the name field, and the dates 12th September 2011 and 12th October 2011 into the document date field. In our example, a restriction exists for the company 01.



In our example, a restriction exists for the company 01.



User manual II. Retrieval Search

Example 2: You are looking for all documents relating to the subject "User manual". Simply enter the term "User manual" into the subject field. Alternately, you can search all the companies by leaving the company field empty.

		General [Search]					- O X
Search Hit I	ist View Inform	ation						
Find Export (Clear (More + Searc	Forward Backward Delete history	Search all databases Archive General Archive	•	Display search favorites * Search s	Save as Edit New	Extras	Close	
Company		- KC -	Article No.	1				0
Company Document type Document date Document No. Offer No. Order No. (internal) Delivery Note No. Invoice No. Credit Memo No. Request No Order No. Customer/Supplier No. Name PLZ Location		o. KG ♥ ♥ ■ ₽ ₽ ₽ ₽ ₽ ₽ ₽	Article No. Article name Serial No. External Docur Service report Contract No. Currency Total dear ann VAT 19% Total-gross an Cost centre de Account Account descri Project no.	ment No. No. out escription				
Salesperson			Delivery date	Juon	Ħ			
Subject	User manual		Access to PK					12
Info Full text			Archiving date Offer existing Order existing Order-confirm Delivery note o Invoice existin	? ation? existing? g?	.			₩ • • •
			Release 1 Release 2 File extension	8				•



User manual II. Retrieval Search

Full text search

For a full text search, you need the additional module HABEL FULL TEXT and the related text recognition license. Full text search is generally installed only for selected document types such as manuals, minutes of meetings, correspondence etc. and can be identified by the additional "Full text" input field.

•	Full text
6	the second proving a path a company
	1 & anon from which a growing and

For into this field. The search covers all documents and their contents that have been activated for the full text search. Various options are available for input:

and Search for several terms, all of which should occur in the document

or Search for several terms, one or more of which should occur in the document

and not Search for several terms, one of which must not occur in the document

- * Wildcard for several letters, characters: The term is only part of the search term, e.g. user* will find user manual, user rights etc.
- ? Wildcard for individual letters or characters

After triggering the search, the hit list appears with all documents which match the selected term(s). The hits are highlighted in the TIFF documents if the system has been configured to do this. Select all hits, and press the *View* button to switch to the *View* tab to jump from hit to hit. In the *View* tab, select the menu item *Functions* group and *More* button for this function. This allows you to access the hits within the document. With this function, you can also retrieve hits from other documents that you have selected.



As well as full text search or index search only you can also <u>combine</u> them. This is done by entering search terms in the same way as for the index search and entering an additional term into the "Full text" or "Content" field, via which the full text is searched (limited to documents which could be relevant due to the search terms input).



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Finding

After entering the search criteria, starts the search by pressing the *Find* button or the *F3* function key, and the hits are displayed. The *hit list* tab becomes active. You will obtain the so-called "hit list" as your result. This shows you all documents containing all input search terms in combination. To return to the input fields in the search mask, press the *Back* button.

6		ج (🚱) ≠ General [Search]							
		Search H	Hit list View Information							
Ø.	3	ि Export ✓ Clear	S Forward		😡 Search all databases	Save as	4			
Fi	Find	💿 More 👻 🧊 Delete history	9	Archive General -	Display search favorites *	Extras Close				
		Se	arch		Archive	Search saved	Action			

Search tab – Find

	(B) =	-	Gene	eral [Hit list - St	andard	-Einstellung	Rechero	he -]			-		
	Search	Hit list View	Information										
Show	Informa	ition 🕞 Save - Mai Send - More	Forward Backward	Fax-Druck	1 ∎ □ ◆	Columns	Hit Hit *		More	Extras	Back	Close	
		Edit				Settings		Documen	t preview		Action		

Hit list tab – Back button

(M) =	General [Hit list - Si	tandard-Einstellung Ree	cherche -]		
Search Hit list View	Information				
Im Information → Print Show → Clear → Save → → Save → → → Save → → Save → → → Save → → → → → → → → → →	Forward Backward Delete history	Columns H		re Extras Back	Close
Edit		Settings	Document prev	ew Action	
	Name Document type	Customer/Supplier No.	Order No. Name		Location
	Product information	70392	587990 Bergmann	Software Ring	Villingen-Schwenn
Erfolgreicher Launch von Astonia * 3	Product information	88888	517199 M. Maier G	mbH	Musterheim
Hamburg, Y. Marz 2003 Mill (sen Children Bullemainte) Askenis ** 3 jewer skontis comit. des em 1: Marz 2003 mill dem Children Bullemainte Askenis and ender Mark is an den Mark 15 kinned	Product information	00001	586653 HABEL GM	BH A	Rietheim-Weilheim
Altr um Alt Rollingel im Farter Wealthe Game, is dan die Spaler zu fallingen der Klager durch die Seige Keit sicht und unbihige Aberteuer bestehen mit	Product information	99999	537684 S. Maier G	mbH	Musterloch
Der Spieler bei ift das Reich Astonia, das von Wiesen aus der Unterveit bestahl wird. Auf solner Reise durch Astonia begegnet er Kämptern und Zauberent, besucht Burgen	Product information	23320	517829 informatic	ag	Köln
und Stadie. Er muß megleche Unterviellen duschstreiten und Moneter und Dämeren Leelegen.	SLS Correspondence	27442	225613 Weinmann	Geräte für Medizin Gm	Hamburg
Aufgebe des Spielens eix es, éen Ursprung der Stechning des Emplese zu finden zwei Assonie wir dem Urtergeng zu beverhnen. Er kans eisen entscheiden, dieser Aufgebe allete Hen zu werden oder son mit socheren Spielern in Class zusammergruuschliefent	Product information	33333	550755 Feinmecha	nik Müller	Musterlingen
und gemeineum dae Land zu eikunten	Brown has to be formed to be	00047	500450 total		Minut

Hit list



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If no documents contain the entered terms, no hits are shown.



If a number greater than 0 is in parentheses, it means that there are documents for this criteria but they cannot be displayed because you do not have the appropriate access rights.

More inf	ormation	х
1	No data found for this search argument! (0)	
	ΟΚ	

Only show post basket entries

You can restrict the results so that only those hits are shown which are identified as undone in a post basket. The **HABEL POST BASKET** is required to use this function. This restriction is activated by a button. Within the search, only those entries are shown in the hit list that are set in at least one post basket and are identified as undone. Moving the mouse over the entry in the hit list displays an information field providing details of the post basket owner who has set this entry in the post basket and not yet completed it.

	ج (🚱		Genera	I [Search]
	Search H	it list View Inform	ation	
Find	Export	 Forward Backward Delete history 	C Search all databases	
	Sea	arch	Archive	
Compa Docum Docum	ent type nent date	01 HABEL Gmb Only	/ show post basket ▼ (E)	Article No. Article name Serial No.

Search tab - Only display post basket entries button

*	Name Document type	Order N	٧o	Order No	Customer/Supp	olier No Nan
1	SLS Offer	225615	i		26160	info
	SLS Order confirmation	2256	-	N	26160	info
1	SLS Invoice	225615	i	3	26160	info
	SLS Enquiry	225615	i	Schmit	tt, Mike	info
1			-	and the second se	and the second sec	1000

Hit list tab



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Export

In addition, by using the additional module **HABEL EXPORT**, you can start an export from the Search tab. First enter the search criteria, and then press the *Export* button. You can find additional details on how to use this module in the section *Export functions*.

		General [Search]									
		Search Hit list View Inform			ation						
Ó	1		Forward		😡 Search all databases	Save as	4				
F	ind	🌀 More 🔻	Delete history		Archive General -	Display search favorites *	Extras Close				
		Se	arch		Archive	Search saved	Action				

Search tab – Export button

Clear and start new search

If you want to start a new search, you can clear the entered search words in the search mask (press the function key F6) and enter new criteria. Alternately, you can start an additional search (function keys CTRL + N) so that there are two search masks for making entries and searching. You can open any number of search masks.

	D	(n) =	ر الم General [Search]									
		Search	Hit list View In	forma	tion							
ø	*	Export	Forward Backward	٩	😡 Search all databases		۵	Real Save as	٨			
F	ind	More	Delete history	1	Archive General		Display search favorites *	New	Extras	Close		
			Search		Archive		Search sa	ved	Act	tion		

Search tab - Clear button and Start new search button

Search history

If you have already executed number of searches, you can switch back and forth between them (search history; press ALT + arrow keys). By the way: The search history is available in the Search tab and in the Hit list tab.

Example:

Search A is executed Search B is executed Select Backward to go to search A, and select Forward to return to search B.



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								Jearci
6	D	(3) =			General [Search]			
		Search Hit list View Informa		ation				
Ó	*	Export	Forward		😡 Search all databases	Save as	4	
F	Find	More + V Delete history		Archive General +	Display search favorites • New	Extras Close		
		Se	arch		Archive	Search saved	Action	

Search tab - Forward, Backward and Delete history button

Select the Delete history button to delete the history so that the prior search is no longer available.



However, you can configure it so that the history is still available after closing the search. This setting option can be found in the group *Extras* – *Settings* – *General*. If the function *Save history upon closing* is not activated, the history is deleted when you end the search. Up to 10 searches can be saved. Once this maximum is reached, the oldest search is deleted.

Settings		х
▶ General ▶ Display	General	
Hit list ▷ · Print settings Mail settings ▷ · Style	Application Close program with X Always on top Save history upon closing	

Search tab - Extras - Settings - General

Select several databases – search all databases

If you are using several databases e.g. for different areas (general, human resources, accounting) or various time periods (years 2006, 2007, 2008), you can select the database (the archive) you wish to search in.

	(B) +				General (Search)					
1	Search	Hitlint	Hit list View Information			when				
53	Character Character	Egent Oferward			🕞 🔯 Search All defabases					
Find		IDA Mara		data hutor	. 53	Archice	General			
	Ca months to	Search				Seneral Personalmanagement	1			
Comp	MV.	91	01 HAREL GOOM		80	Freight terwarding				
Docum	Document type					Adeta Lohn/Personal	L.C.			
Docum	ient date ient No.		6			Hotel DIV				

Search tab - Select archive





Alternatively you can also search several databases at once. You can use the multiple database search to do this.

	(%) =	1	General [Search]				
	Search Hit li	st View Inform	ation				
Find	Export (Clear (More)	Forward Backward Delete history	General General				
	Searc	h	Archive				

Search tab - Archive - Search all databases

After you click the button, a selection window opens within which you can select the database(s) you want to search.

🕵 Database selection		x
General Personalmanagement Vertragsmanagement Adata Lohn/Personal Hote DIV	•	
<u>O</u> K <u>C</u> ano	el:	

The setting will be saved for each database. For example, when calling up the database "General" you can configure the search to be carried out in both "General" and "Human Resources" databases. In the "Human Resources" database you can configure the search to be performed in both the human resources and freight forwarding databases etc.

The listed order is also the determining factor for the display of the result. If e.g. a search is executed over the databases General and Human resources, first the results of the general and then the ones of the human resources database will be displayed. If you move the database human resources up using the arrow key, first the results of the human resources and then the results of the general database will be displayed.



As soon as you have selected additional databases, the multiple database search is active. This is indicated by the arrow next to the button.



To deactivate this function, click the symbol and deselect the relevant databases, and the symbol will change.



User manual II. Retrieval Search

Search favorites

You can select favorites for searching in HABEL. This is useful for example when you frequently use the same search criteria for a search. The entered search criteria are saved as "Search favorites" for quick access. Enter the desired search terms, in the group *Search favorites* select the *New* button, and then enter the name of the search favorite.

	(20) =] <mark>x</mark>			
	Search Hit list View	Inform	ation			
Find	Export Source Clear Backward More Delete history	&	Image: Search all databases Archive General	Display search favorites - New	Extras Close	
	Search		Archive	Search saved	Action	

If you want to use the search favorites or check which search favorites are already saved, you can retrieve them by pressing the "Display search favorites".

	(3) =			General	[Search]			-		
	Search H	it list View Ir	Information							
sigo 1	Export	Forward	٩	Search all databases		>	Ros Save as	٩		
Find	More +	lore 🧊 Delete history	Archive General		-	Display search favorites *	New	Extras	Close	
	Se	arch		Archive		🏷 Invoice 40)1495			
Compa Docum Docum	any nent type nent date	01 HABEL Gm	ЬН & С	o. KG ▼ ▼ (E)	Article No. Article name Serial No.	Order corDocumer	nfir Mations 200 nt n Invoice 401	18-2010 1495		P

Search tab - Search favorites group - Display search button

Use the *Edit* button to edit the search favorite: Change the criteria or name, or delete the search favorite. When you press the *Replace* button, the currently selected search criteria for the selected search favorite is saved as the new criteria (the existing search favorite is replaced).

Search saved		- = x
Caption	Field name	Value
Sample search		
Sample search	BelGrp	01
Sample search	Firma	01
Sample search	BelArt	0009
Sample search	RechNr	401495
Load Clear	Caption	Cancel



User manual
II. Retrieval
Search

Quit

There are various options for ending the search. Press the button in the *Action* group, our use the combination of function keys ALT + F4.



The search can only end when there are not more pending processes (such as the printing of a document).

) 🕫 General [Search]							
	Search Hit list View Inf	ormi	tion						
00	Export Forward		😡 Search all databases	Save as	۵				
Fin	nd 💿 More 🧊 Delete history	8	Archive General -	Display search favorites • New	Extras Close				
	Search		Archive	Search saved	Action				

All tabs – Action group – Close button

If you define in the settings that the program can be closed with X, you can also stop the search by clicking X.

General	
Application	₹
Close program with X	Ż



All tabs – Action group – Extras button – Settings menu item



User manual II. Retrieval Search

3. Special mode: Detail search

Expanded searches are possible with the detail search. The detail search corresponds to a filter, i.e. the initial search is via the additionally input terms and then the results filtered using the requested detailed terms. However, if no additional search term has been entered into other database fields, the search covers the entire database, which can make the search longer.

Fields, for which a detail search was activated, are marked with the corresponding symbol at the end of the line.

Company	01	HABEL GmbH & Co. KG	-
Document type			 1
Document date		E	H
Document No.			0

If you click on these three dots you go to advanced search. Here, you can search in three different ways.

from – to

Enter the lower value, followed by two dots (designates the term "to") and the highest value. In addition, other ranges can be entered separated by semicolons.

Example

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

or

Input of several terms separated by semicolons.

Example

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



The various input options are detailed in the description you access via the symbol. sure that you observe these instructions!

	Search
?	Make

User manual II. Retrieval

Extended search arguments	x
It is essential that	you read the instructions on this search method 💡
Search:	
🔲 Use for index search?	OK Cancel

About	X
Note:	*
You are starting an extended search. This search will take longer than usual. To avoid unnecessary search time, observe the following instructions.	
An extended search allows you to search using several criteria in a search field. In a standard search, only one value is entered into a search field. For example: customer ID number = 15027. In an extended search, you can enter several values in a field. For example: 15027;18936;58341.	
An extended search function acts as a filter; that is, it first searches using the additionally entered criteria, and then filters the results. If no additional search criteria is entered in another search field, the complete database is searched. This can take a very long time. We therefore recommend that additional search criteria be entered when an extended search is used.	Ŧ

The asterisk at the end of the search criterion indicates that several terms have been entered in a field or that it is a from-to search.

Document type



User manual II. Retrieval Search

4. Special mode: HABEL-SYNONYM

If you are looking for terms that are synonymous you can use the synonym search.



You must provide HABEL with a table showing which terms are regarded as synonymous. For example, you could also store a foreign language equivalent of the term.

The fields for which synonym searching will be activated will be defined and configured in advance. The following example was prepared using the "Content" field or "Full text" field:

The search term is entered into the "Content" field. A full text search for the term is performed in the background (provided you have the module **<u>HABEL FULL TEXT</u>** or for the term assigned in the table (in this example: heart and the German word Herz).

riedru

The displayed result is highlighted in the document.

Print Save C	Ange info inctions	Image: Second content Image: Second content Image: Second content Image: Second content <	Contraction Active	Show Show More A	Back Close
					*
	prevent viruses f improvements to helps protect age the user make sr	from spreading via e-mail and Outlook Express, a Windows ainst viruses that spread throu marter decisions and discourag	messaging technologies. These Messenger update and a new p gh e-mail and instant messagi ling unsafe behavior around at	e include public API that ng by helping ttachments.	×
	Attachment Man At the heart of the public API known known unsafe file amount of system consistent user et trustworthiness. Microsoft is encoo Instant messagin	ager API he improved attachment handl h as Attachment Manager. Atta e types, and attachments are of m privilege. Applications that u experience with attachments ar Windows Messenger and Outlo uraging third-party attachmen ig applications to take advanta	ing in Windows XP Service Pac ichment Manager "distrusts" ar opened and executed with the use Attachment Manager will pr nd will display information on a book Express take advantage of t-handling applications such as uge of it as well.	k 2 is a new nd isolates least possible rovide a an attachment's this API. s e-mail and	

Document display



User manual II. Retrieval Search

However, a synonym search can also be performed without the full text search option. In this case the search is done in the defined database fields for which a table of synonyms has also been defined. After input of the search term a check is carried out to verify whether the field content matches any of the defined synonymous terms. The search result is displayed as a hit in the hit list. The terms are not highlighted.

In the example, the search looked for the term WORM in the field "Article Name". The term UDO was also stored as synonymous with this term. The result shows hits with both terms.

Name Document type	Order No.	Article No.	Customer/Supplier	Name	Article name
SLS Offer	225612	10099	23317	Interconnect AG	WORM-Platte Plasmon 5,2 GB
SLS Order confirmation	225612	10099	23317	Interconnect AG	WORM-Platte Plasmon 5,2 GB
SLS Invoice	225612	10099	23317	Interconnect AG	WORM-Platte Plasmon 5,2 GB
SLS Offer	225615	10099	26160	informatica ag	WORM-Platte Plasmon 5,2 GB
SLS Order confirmation	225615	10099	26160	informatica ag	WORM-Platte Plasmon 5,2 GB
SLS Enquiry	225615	10099	26160	informatica ag	WORM-Platte Plasmon
SLS Order	225615	10099	26160	informatica ag	WORM-Platte Plasmon
SLS Delivery note	225615	10099	26160	informatica ag	WORM-Platte Plasmon
SLS Delivery note	225615	10099	26160	informatica ag	WORM-Platte Plasmon
Supplier Enquiry	225615	10796	70527	DIGI-IT	UDO-Jukebox Plasmon
Supplier Order	225615	10796	70527	DIGI-IT	UDO-Jukebox Plasmon
Supplier Offer	225615	10796	70527	DIGI-IT	UDO-Jukebox Plasmon G24-1
Supplier Order confirmation	225615	10796	70527	DIGI-IT	UDO-Jukebox Plasmon G24-1
Supplier Delivery note	225615	10796	70527	DIGI-IT	UDO-Jukebox Plasmon G24-1
Supplier Enquiry		10797	70528	Bergmann Software Ring	Plasmon UDO-Laufwerk
Supplier Order		10797	70528	Bergmann Software Ring	Plasmon UDO-Laufwerk
Supplier Offer		10797	70528	Bergmann Software Ring	Plasmon UDO-Laufwerk
Supplier Order confirmation		10797	70528	Bergmann Software Ring	Plasmon UDO-Laufwerk
Finance Invoice:		10797	70528	Bergmann Software Ring	Plasmon UDO-Laufwerk



User manual II. Retrieval Search

5. Special mode: Search using the hotkey

Using hotkeys (shortcut keys) you can initiate a search in HABEL RETRIEVAL via highlighted text passages in other applications. The module HABEL Hotkey will be integrated in the Windows task bar und enables the use of the hotkey function.

Verbun	H	ABELShortcut	hange 🔻
- 13	Ų	🕩 🛱 🎽	08:22

To use the hotkey search the shortcut must be activated. Right click on the icon to configure settings for the program.

Using the command Options you reach the settings menu for the hotkey search. Within the settings you can make individual as well as global definitions (depending on the user rights).

	111	Options	
	6	Activate	
Z	3	Close	

Administrator		
persönliche Einstellunger	n bearbeiten	
🗸 Benutzer können pers	sönliche Einstellungen <mark>e</mark> inrichten	
Zuordnung von Tastenko	mbinationen zu Suchfeldern	
Tastenkombination	Feldbezeichnung	I
Strg+8	Auftragsnummer (intern)	Hinzufügen
-		📝 Bearbeiten
		X Löschen

Using the button *Add* you can create new shortcuts. Using *Edit* you can edit existing shortcuts and using *Delete* you can delete existing shortcuts.



User manual II. Retrieval Search



For the definition of the hotkeys please chose first the document group (e.g. General, Human Resources, etc.) (1). By choosing the field name (2) you define in which field the marked value will be taken over. The corresponding internal database field will be automatically filled after choosing the field name. The shortcut (3) is defined by pressing the desired key combination.

You have further possibilities to influence the activated search for this key combination. (4)

Search with document groups

If this function is not ticked the search will be executed within the document group which is active in the Retrieval. The document group (1) will be ignored.

Stop in the hit list

If this function is activated, the search will be stopped in the hit list, not in the preview of the first result.

With wildcard search

The wildcard search allows a search for parts of the field content. For example not the whole document number 123456 is known, so it is possible to search for 3456. To get the correct result it is necessary that the number is preceded by a * (*3456). This means that all entries are found, which have 3456 at the end of their document number. It is irrelevant what is standing before. If the function is ticked, a * will be placed before and after the corresponding value.

Start Retrieval new for each search

If this function is activated, for each search a new Retrieval will be started.



User manual II. Retrieval Search

E.g. as shown in the graphic: If you highlight a value (e.g. a number) in an external application and press ALT + ALT +R, this value will be added to the invoice no. field in the background and the search initiated.

Beleggruppe		
01 - Allgemein (HDHBL03)))	•
Feld-Bezeichnung	DB-Feld	
Rech Nr	▼ RechNr	•
Tastenkombination		
STRG + ALT + R		
 Mit Beleggruppe suche Stop in Trefferliste Mit Wildcard-Suche Recherche f ür jede Su ✓ Aktiv 	n che neu starten	



Some hotkeys are already occupied by Windows, e.g. CTRL + C for copy.



User manual II. Retrieval Search

6. Special mode: Search over file directory tree

In connection with the use of the module HABEL-EXPLORER Import it is possible to search or display the documents over an explorer structure in the Retrieval. If the search over file directory tree is activated, within the *tab search* – *search group* – *button more* the command directory tree appears.

The column directory tree appears. Over the context menu (right-click on the column directory tree) the directories are read. In addition the commands *Open folder, Expand (all), Collapse (all)* are provided.





User manual II. Retrieval Search



For the search you have to decide in which directory you want to search and then mark it and load it over the command *Open folder*. Afterwards the hit list will be displayed with all the results which lie under this file level. The requested result can now be chosen.



In our case, all the documents which lie under InterConnect AG would now be available in the storage. The documents, which belong e.g. to the Bergmann Software Ring, are not loaded yet and for this reason not in accessible. If you want to have all the documents in access which lie under *document*, you will need to execute the command *open folder* on the level documents. This can cause a longer waiting time, because a higher volume is loaded.

To see where the	files have	their oriain.	vou can displa	v the path i	n the hit list.
			J	<i></i>	

Directories 🗖 🖣 🗙		Hit list					
directory tree	1	Γ			_		
🗆 u:\		*	Name Document type	Path	Na		
 Dokumente 		>	Product information	u: \Dokumente \InterConnect AG \	In		
InterConnect AG		Γ	Product information	u: \Dokumente \InterConnect AG\	In		
Bergmann Software Ring Karl Muster Automobile S. Maier GmbH HABEL GMBH A		Γ	Product information	u: \Dokumente \InterConnect AG\	In		
		Γ	Product information	u: \Dokumente \InterConnect AG\	In		
			Product information	u: \Dokumente \InterConnect AG\	In		
			Product information	u: \Dokumente \InterConnect AG \	In		



User manual II. Retrieval Search

7. HABEL CONNECTION and HABEL CONNECTION plus

You can also start a search for documents from other applications. You will need the module <u>HABEL</u> <u>CONNECTION</u> (displays the result in HABEL) or <u>HABEL CONNECTION plus</u> (displays the result in the other application).

Your external application will have a function key or button to initiate access to HABEL. On starting the program the criteria to be used for the search are transferred to HABEL. In the background these criteria are entered into the defined fields in the search mask and the search is initiated.

HABEL-CONNECTION

The hit list or the first hits matching the search criteria are displayed in HABEL RETRIEVAL.

HABEL CONNECTION plus

In this case the results are displayed by the external application and HABEL RETRIEVAL itself is not opened. Either the first hit matching the search criteria is made available as a document or alternatively a hit list is provided as an xml file from which you can select the document to be displayed.


User manual II. Retrieval Hit list

Hit list

After a successful search, the hits are displayed in a hit list. The hit list contains all files matching the input search terms. The database fields are displayed with the content, and you can individually set which of the fields are to be displayed. In addition, the document (for the selected process) can be displayed in the document preview.

The hit list has the following structure:

- (1) Multifunction bar for all program functions
- (2) Document preview
- (3) Hit list



Hit list tab



User manual II. Retrieval Hit list

The hit list has the following layout:

*	Name Document type	Customer/Supplier No.	Name	Location	Order No.	Article No.	Article name
>	SLS Offer	23317 3	Interconnect AG	München	225612	10099	WORM-Platte Plasmon 5,2 GB
	SLS Order confirmation	23317	Interconnect AG	München	225612	10099	WORM-Platte Plasmon 5,2 GB
	SLS Invoice	23317	Interconnect AG	München	225612	10099	WORM-Platte Plasmon 5,2 GB
	SLS Offer	26160	informatica ag	Köln	225615	10099	WORM-Platte Plasmon 5,2 GB
	SLS Order confirmation	26160	informatica ag	Köln	225615	10099	WORM-Platte Plasmon 5,2 GB
	SLS Invoice	26160	informatica ag	Köln	225615		
	Supplier Delivery note				0		
	Supplier Delivery note				G		
	SLS Enquiry	26160	informatica ag	Köln	225615	10099	WORM-Platte Plasmon
	SLS Order	26160	informatica ag	Köln	225615	10099	WORM-Platte Plasmon
	SLS Delivery note	26160	informatica ag	Köln	225615	10099	WORM-Platte Plasmon
	SLS Delivery note	26160	informatica ag	Köln	225615	10099	WORM-Platte Plasmon
	SLS Order confirmation						
	Supplier Delivery note						

The column heading (1) of the hit list shows the respective search criteria as found in the search mask. Within columns (2) the value given to the respective document as search term (in the archiving process) is displayed. To go from one hit to the next you can use the up/down arrow keys or click in the fields/lines to go there directly. The currently selected dossier is highlighted (in blue) (3) (an entire line is always selected).

) 22			eneral (He ad - Sondard -)			
Search F	it fat Van lieform	ution				
Born Contention Content Con	NEISent - Office Market - Office Market - 200	dward dward Iara Nictory	ck Dielect all hits Colo	1 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	More.	Sect Do
	141		Settings	Dottimes	t pitterne	liction
ALCONG D						
Order confirmation	Ho. [1]					
1	Market Street	- 01-11-11-11-11		0.000		
Dogment type	Name Document type	Opcument date: Cut	toner/5 flane	Lecition	Department	Property
Chiler sonfirms	Ann Ne. (1) : 328183					
Comments	THE CONTRACT OF THE PARTY OF TH	1000 (1000) - 100 (and the second second second	EXCUTE LINKS	Course of Manhard	
	US Date configuration	2/28/2009 28.2	10 Information AC, VOID	50017 Killer	Verbaul/Cales	
armida o	s dettaliant Ex	and the Description of the	Manual Terrals (Jamas Vice)	an d'astantale fan in de	other Minority Real	This part of the second
Autobert	or of second processing	sold portential dentes	Prenge control diesen Passa	er vasierside sez. //o	AND ADDRESS.	State () and
11746	Federa Serie	1915 - C			- N -	
11057	Federa 7. See					
141 0057	SES Pallueru note	2/22/2006 261	1 Infrantica aG - size	6/19/17 #1/#h	Wark to All Codes	
iii core	515 21/ope	3(3(2009 26)	ni Informatica AG - Kisin	5093710ahr	Verke Attalen	
B Over online	movine. (t): 228191	11-27/210 - 1-220	ale electronalessates	1000 051A	0.000000	
Drive confirm	altern fras. (1) : 228160					
C Orter unfirm	Nov Per: (1) 12281279					
0000	SLS Offer	+49,2009 333	33 Fermechanik Müller Smbri	- 775 77555 Musterlingen	Verkau//Sales	
E 0009	SLS Order confirmation	4/7/2008 333	20 Permethank Muller Gribt	- 775 77525 Husteringen	Verkau//Salas	
Article in	o. Artikebes. Fre	onlartik Frandertikebez	Menge Einzels Gesam Kost	er Kastenstole Bez. Ka	nto Nanto Bez.	Nome I Ran
11053	Rohrstmade 1.8mm		and the second s			
11054	Plugelmuiter DBN 321					
18 0007	SLS Delivery make	4/7/2009 333	33 Permetianik Müller Graht	- 775 775551%asterlingen	Verkau//Saler	
E 0009	SLS Invote	+(30/2009 333	 Fennechank Müller Linbi- 	- 775 77555 Musterlingen	Verkau//Sales	
(ii) Order confirm	(Northin, (1): 2201270					
B Order confirm	elicer Frill. (1) + 1281177					
B Online confirms	ritori bili. (1) : 220.076					
O Drifer sarringe	(tory No. (1) : 3281275					
A Printer and the			1			-

If "Show items in hit list" is activated (All tabs group action - Extras hit list), an overview of the positions which belong to the process and which match the search criteria is displayed. They can be accessed alternatively over the information mask.



User manual II. Retrieval Hit list

1. Hit list settings

For the individual design of the hit list, the user has a number of options within the *Hit list* tab – *Settings* group.

Fit width

The width of the hit list can be adapted so that there is an optimum distribution of columns over the available width.

	(g) =			and the second sec	Gene	ral [Hit list - Standar	d -]						• ×
9	Search	Hit	list View	Information									
Show	Informa	ition	Gave →	 Forward Backward Delete history 	Fax-Druck	Group C Select all hits I Fit width	Columns	Hit Hit		More	Extras	Back	Close
			Edit			Set	tings		Docume	nt preview		Action	

Hit list tab - Settings group - Fit width button

Name Beleg	art.	Bele	gdatum
VK Angebo		22.0	5.2009
VK Auftrage	sbes	27.0	5.2009

Double-click the respective end of the column to adapt the width of the column to the longest term in the hit list (requirement: the cursor needs to switch to a "cross-shape").

Grouping

The view of the hit list can be grouped (remains saved after the search is over).

	(g) =		-	-	Gene	ral [Hit list - Standar	d -]							
9	Search	Hit	list View	Information										
Show	Informa	tion	Gave →	 Forward Backward Delete history 	Fax-Druck	Group Select all hits	Columns	Hit list *	ja A		More	Extras	Sack	Close
			Edit			Set	tings		Doc	umen	t preview		Action	

Hit list tab - Settings group - Group button

Press the *Group* button for the grouping function. A new bar appears into which you drag the column to be grouped.

Н	t list			Result:	Hit li:	st	
	Order No.	er here to group by that column			Or	der No. (1) 🗸	
*	Order No. (1) 🗸	Name Document type	Customer/Supp		* N	ame Document type	Customer/Supplier No.
>	228183	SLS Offer	26160		G	Order No. (1) : 228183	
	228183	SLS Order confirmation	26160		Η-	SLS Offer	26160
	228183	8183 SLS Delivery note 26160				SLS Order confirmation	26160
	228183	83 SLS Invoice 26160				SLS Delivery note	26160



User manual II. Retrieval Hit list

To expand or reduce the grouped entries, use the menu below the hit list button (1), or click the bar above the column name (2). The entries are correspondingly expanded or reduced.

Gene	eral [Hit list - Standard -]
Search Hit list View Information	
Im Information Im Save → Im Save → <td< th=""><th>Image: Select all hits Image: Select</th></td<>	Image: Select all hits Image: Select
Edit	Settings Hit list selection P
Htt list	Search hit list F7
Order confirmation No. (1)	No sorting
	Save
Document type Name Document type Document date Custome	er/S Name Save as new setting
➤	Save as default Shift+Ctrl+F11
☑	Course of the American Street
Order confirmation No. (1): 228181	Save with document type
Order confirmation No. (1): 228180	Save to document type (global)
	Save to document type (global) Delete document type settings
Order confirmation No. (1) : 228180 Order confirmation No. (1) : 228179 Order confirmation No. (1) : 228178	Save to document type (global) Delete document type settings
(+) Order confirmation No. (1) : 228180 (+) Order confirmation No. (1) : 228179 (+) Order confirmation No. (1) : 228178 (+) Order confirmation No. (1) : 228177	Save to document type (global) Delete document type settings Overview
Order confirmation No. (1) : 228180 Order confirmation No. (1) : 228179 Order confirmation No. (1) : 228178 Order confirmation No. (1) : 228177 Order confirmation No. (1) : 228177 Order confirmation No. (1) : 228176	Save to document type (global) Delete document type settings Overview Expand all
Order confirmation No. (1) : 228180 Order confirmation No. (1) : 228179 Order confirmation No. (1) : 228178 Order confirmation No. (1) : 228177 Order confirmation No. (1) : 228176 Order confirmation No. (1) : 228175	Save to document type (global) Delete document type settings Overview Expand all Collapse all
Order confirmation No. (1): 228180 Order confirmation No. (1): 228179 Order confirmation No. (1): 228178 Order confirmation No. (1): 228177 Order confirmation No. (1): 228176 Order confirmation No. (1): 228175 Order confirmation No. (1): 228174	Save to document type (global) Delete document type settings Overview Expand all Collapse all

Hit list tab – Settings group – Hit list button

н	t list			
[Order No. (1) 🗸		•	
		A.	(2)	
1	Name Document type	- 0	Customer/Supplier No.	Name
>	+ Order No. (1) : 228183			
	+ Order No. (1) : 228182			
	🛨 Order No. (1) : 228181			

Select all hits

To mark all the hits in the hit list, in order to initiate further functions, the button in the menu can be used. In addition you can also use the shortcut CTRL + A.

		(g) =			And and a state of the local division of the local division of the local division of the local division of the	Gene	ral [Hit list - Standard	d -]						
		Search	Hit	list View	Information									
S	o how	Informa	ition	Gave →	 Forward Backward Delete history 	Fax-Druck	Group Select all hits	Columns	Hit Hit *		More	Extras	Back	Close
				Edit			Sett	tings		Docume	nt preview		Action	

Hit list tab – Settings group – Select all hits button



User manual II. Retrieval Hit list

Filters

There are a large number filtering options in the hits list. You need to define in the generally settings (All tab - Action group - Extras button - Settings menu item) that the filter is active for the hit list. You can tell if a filter is active because a downward arrow appears for each column when you drag the mouse over it. When you click on the arrow, the filter selection window opens. Once you select the desired term(s), the filter becomes immediately active. The selected filter can also be seen in the status bar, and it can be changed by clicking the "Customize" button.

1

Name Document type	🔄 Order
SLS Offer	W2281
SLS Offer	2281
Name Document type	Or 💌
(All)	▲ 22
(Custom)	22
Doku-Editor	27
Drawings	25
Finance Invoice:	22
SLS Delivery note	22
SLS Enquiry	≡ 22
SLS Invoice	22
SLS Offer	22
MSLS Order	2) 12
SLS Order confirmation	
Supplier Delivery note	25
Supplier Enquiry	25
Supplier Invoice	22
Supplier Offer	▼ 24

*	Name Document type	o
>	SLS Offer	2
	SLS Offer	2
	SLS Offer 3	2
	SLS Offer	2
	SLS Offer 4	D
>	 (Name Document type = SLS Offer) 	1

A large number of filter options can be set such as restricting the amounts.



User manual II. Retrieval Hit list

Sorting

You can sort in ascending and descending order by simply clicking on the respective column. The **arrow** shows the sorting direction.

If you want to sort several columns click on them one after the other *with the shift key held down*. A number shows which criteria are used for initial (1) sorting and subsequent sorting (2), (3) etc.



If the hit list has been sorted, all sorting can be discontinued by selecting a menu item within the *hit list* tab – *Settings* group – *Hit list* button – *No sorting*. The hits are then shown in the list according to archiving date.

	(B) =				Gene	ral [Hit list - Standar	d -]						
9	Search	Hit list	View	Information									
Show	Informa	ition 🔒	Save + Send + More +	 Forward Backward Delete history 	Fax-Druck	Group Select all hits	Columns	Hit list *	53 54		More	Extras	Back
			Edit			Set	ttings	F	lit list s	electio	n		or
Prev	list							S	earch h	it list		F7	
				200 200 M - 51	111.122		e lui	N	lo sorti	ng			
*	Document type	e (1) 🖉 🛛	ame Docume	nt type (2) / Docum	nent date (3)	Order confirm Cust	tomer/S Name	5	ave		N		_



User manual II. Retrieval Hit list

WE CONVERT DOCUMENTS INTO ENERGY

Search within the hit list

If the function is active (indicated by a check in the menu), you can search directly in the hit list for the content of database fields to obtain the desired results.

To do so click in the column you want to search (1) and start entering values using the keyboard. The cursor immediately goes to the result deriving from the values entered (2).

*	Ku/Li Nr	Name	Ort
	23317	Interconnect AG	München
	26160	informatica ag	Köln
	26160	informatica ag	Köln
	26160	informatica ag	Köln
	23317	Interconnect AG	München
	26160	informatica ag	Köln
	23317	Interconnect AG	München
	26160	informatica ag	Köln
	26160	informatica ag	Köln
>	70528 2	Bergmann Software Ring	Villingen-S
	70527	DIGI-IT	Stuttgart
	70528	Bergmann Software Ring	Villingen-S
	70527	DIGI-IT	Stuttgart

For example: You are searching the hit list under the contractual partner name (column: Name) for the name Bergmann. First click in the column Name (1), and then enter Bergmann (2).





User manual II. Retrieval Hit list

Selecting columns

All search terms configured in the system are available as columns. They can be shown or hidden as required. Use the column selection function to do this. If the columns are set within a list resulting from a search with a document type, this setting can also be saved in relation to the document type.



Hit list tab - Settings group - Columns button

Add the column by simply dragging it with the mouse button held down out of the box to the other column headings. In the same way any columns no longer required can be pushed back into the box and thus hidden.

	÷ ×	Hit	list				
							,
HORE	a*	*	Nan	ne Document type	Order No.	Offer existing	Customer/Sup plier
Dekomatannana			SLS	Offer	225615	onerno. 4	2 60
NALADAR BARANCE COME Tango AG			SLS	Order confirmation	225615		26160
aben 5 I Musterstetten	Customization		x	Invoice	225615		26160
	Custonnization		-	Enquiry	225615		26160
	Columns		_	Drder	225615		26160
olmutter	Menge	-	•	Delivery note	225615		26160
	Message ID			Delivery note	225615		26160
Arikei Menge	MSGATTID			vings	225615		26160
Frogeinister OIX 318 Rogeinister OIX 318 Meesing blankin 8 rum	MwSt 0%			Enquiry			26160
11086 16 Min Durchmesser Federa Simo Durchmesser Edwinten	MwSt 19%			lier Enquiry			77777
11057 5 St Peden 7.5 mm Ourshmesser Edelatah	MwSt 7.6%/8%			lier Enquiry		N	77777
	MwSt-Schlüssel			lier Enquiry		N	77777
	Name des Kasitel / Abache			lier Enquiry		Y	77777
	Name des Kapitel/ Abschr			lier Enquiry		Y	77777
	Name PDF- Datel Handbu		-1	lier Enquiry		Y	77777
	OCR J/N			lier Order		Y	77777
	Offer No.			lier Order		Y	77777
	Order existing?	_ ,	-	lier Invoice		Y	77777
				lier Offer		Y	77777
Teams controls Co. 82 1111 Jonane Responsabilit fair validat 266 (2001) 0111 7 air validat 266 (2001) Jonapariate Reprintigencials Galerguet Mills (2006) 1111 Rais haft	Constant Agencia and the second and the second and the second agency of the second age of the second a		Sup	plier Offer		Y	77777

Adding the Offer No. column to the hit list

The sequence of columns can be varied by simply moving them from left to right or right to left. The new position for column is marked with two green arrows

	₽			
Name Document ty Offer I	Order No.	Offer existing	Offer No.	Cu
SLS Offer	22 315		100206	26
SLS Order confirmation	225615		100206	26

Placing the column within a different location within the hit list



User manual

WE CONVERT DOCUMENTS INTO ENERGY

In order to add or remove columns in the hit list, you can open the alternative column selection function with a click.

In addition, other functions are offered by the *Context menu* (right-click the column header).



SElecting columns over the context menu

New caption	X
Text	
Name Document type	
OK Cancel	

Alignment	×
Alignment	
@ Fkahlett	
C Flush right	
Center	
QK Qui	

ting Offer No. Customer/Supplier No Name ergn 100206 form 100206 form 103976 26160 nforr 103977 nforr 103978 nforr 103979 einm 103980 33333 einm 103981 einm

*	Name Document type	Z.	Order No.
	Access to PK		
	Account		
đ	Account description		

Caption

For your customized view you can change the column caption by entering new text.

Alignment

The field contents in the hit list can be left-aligned/right-aligned or centered. This setting is also customized for your own use.

Optimum width

Set the column in the view to the optimum width

<u>Hide</u>

Hide the entire column. This can be redisplayed using the column selection function.

Compile cells

The cells within a column that have the same content can be merged for a better overview.

Columns

Open column selection for individually adding or removing the columns from the list.



User manual II. Retrieval Hit list

Save the settings

Changes in the view of the hit list remain active until the search is over. If you want the changes to remain, the new settings have to be saved. In the *hit list* tab within the *Settings* group, click the *Hit list* button with its additional menu subitems to save the settings.



Hit list tab - Settings group - Hit list button

The standard hit list cannot be changed. In order to save a new setting, a new hit list must be saved. Change the hit list as desired, and click the menu item *Save as new setting*.... (1) You will then be asked to enter a name for the new setting.

To open the hit list, in the same menu you can select the item *Hit list selection* from which you can open the desired hit list (2). You can see which hit list is active in the header of the search. If you want to save changes to your own hit list, you can save them by clicking the command *Save*.

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Ca	ption			Number	Usér	04
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	Tes / No. R	MACE.		m.	950	
	DOKUnder	ot		00	950 950	
£						

Overview Hit list selection

If you started a search by entering document types, you can save the settings according to the document types without having to create your own hit list (3). As an administrator, this preference can also be set globally for all users. The document type-dependent list is then automatically used for each search with the defined document type. This preference can be deleted in the menu.



User manual II. Retrieval Hit list

Printing the hit list

You can also print the hit list you obtained after entering search criteria and starting the search. Use the command *Print hit list* (1) under the button *More*.



Hit list tab – Edit group – More button

You can first open a *Preview* (2) of the printouts to make various settings for the margins, page breaks, etc. You can alternately save the hit list by clicking *Save as HTML* (3). There are also various printing styles available that you can add (by the command *Page layout*) (4).

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	5151	+cice	108167	4/21/2017	000969	20200	Informatics AQ - 4	se: 30007 kga	Verkaul/Selec	100			
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	GLG I	roice	THEFT	2/18/2010	disevel.		Ferreschank Mall	r 177951 Mutwinger	Verkaul/Gale	1			



User manual II. Retrieval Hit list

Refresh

The hit list can be refreshed without initiating a new search. For example an entry was archived by Drag & Drop in the meantime, which is only displayed after the processing of the autojob. By pressing the command *refresh* the hit list can be displayed updated (in the background a new search with the same criteria is executed).



Editing functions



Hit list tab - Edit group

Print

The currently displayed document can be printed out by clicking the printer symbol. Depending on settings, you will be asked about various options (printout with text: then the background text e.g. "print archive" is also printed on the document; print annotations: the attached information such as notes is also printed etc.).



🔚 Speichern 💌

Save as HTML...

Save document...

Save mail attachment...

Save document as PDF...

User manual II. Retrieval Hit list

Delete

The selected document is deleted by clicking the Delete command. "Delete" means that the dataset is deleted. The document itself is not deleted, but you will not be able to locate it as the search terms for it have been removed. For this function you require **HABEL CORRECT** and corresponding access rights (should be installed only for a small group of users).

Save

The hit list can be saved in HTML, and the selected hits can also be saved as a file in the archived format (generally the TIFF format) or as a PDF. If the hits have attachments, they can also be saved separately (Save mail attachment...). Alternatively, you can highlight the entry to be saved in the hit list and use drag & drop to position it wherever you like (1+2). The dossier is then saved at this location (3).



Sending

The found hits can also be sent by email if you are using the additional module **HABEL E-MAIL Dispatch**. Use the Send button. The email program opens and creates a new email with the displayed hit as an attached file. If you only want to send a page of the hit, switch to the display of the document, and click

Send as mail Send as PDF-mail

the *Send* button in the *Display* tab. In addition, a menu item is available in the *Send* button that lets you send documents in PDF format. Corresponding licenses are required to do this. The hit that you want to send is automatically converted to a PDF file in the email, provided these are TIFF documents. Files in WORD, EXCEL etc. are generally attached in the original format.



User manual II. Retrieval Hit list

Send dossier as link

If you only want to send a link to the document or the dossier, go to the context menu (right click the hit) for the commands Send dossier as link – Send document as link/Send dossier as link. The recipient merely receives the link (very small file size) to access the document (document display) or the dossier (hit list) directly in the archive.

S.	Drucken				
	Anzeigen		1		
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×	Löschen			· · · · · · · · · · · · · · · · · · ·	Unbenannt - Nachricht (HTML)
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	Protokolleinträge anzeigen		Beetagen 3	F X ∐	温 課 課 Adressbuch Nam Uberpr
	Postkorbbistorie anzeigen		Zwischenabl. G	Battited	G Stamen
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	Vorgang als Link versenden	Link zu Beleg senden	Strg+Alt+1		
	Spalte summieren	Link zu Vorgang senden	Strg+Alt+2		
	a part preserver	a pro annal	mill		

Link to dossier:

The field that you clicked to open the context menu is the criterion by which the search is triggered. This field is in the search mask when you switch from the hit list back to the search mask. This function is useful for example to display a thread of the customer number, order number, etc.

Link to document:

Only the currently clicked document is linked – there are no search criteria in the search path.



The recipient of the e-mail needs access to the retrieval. This is why the link can only be forwarded internally and e.g. not to customers.



User manual II. Retrieval Hit list

Execute external program

It is also possible to access external programs from the hit list in HABEL.

Document type	Offer No.	∇ Order No. Document date Customer/Supplie	er No. Name	Location
SLS Delivery note	103996	D. D. Cont	Bergmann Softw - 78056 Villing	78056 Villingen-S
SLS Offer	103996	S buur	Bergmann Softw - 78056 Villing	78056 Villingen-S
GLS Order confirmation	103996 🤇	1 Display	Bergmann Softw - 78056 Villing	78056 Villingen-S
LS Invoice	103996	Information	Bergmann Softw - 78056 Villing	78056 Villingen-S
LS Order confirmation	103984	In <u>ornation</u>	Informatica AG - Köln	50937 Köln
S Delivery note	103984 >	C Delete	Informatica AG - Köln	50937 Köln
S Offer	103984	Setting	Informatica AG - Köln	50937 Köln
.S Invoice	103984	Setting	Informatica AG - Köln	50937 Köln
oku-Editor	1.01.031.0000	Copy value to clipboard		
		Show log entries		
	16	Show post basket history Create post basket entry Change fields Start workflow Check signature Send as mail Send as PDF-mail		
		Execute external program	ERP ausführen	
		Send dossier as link	ERP (Ablage) ausführen	
		Column total	DATEV ausführen	
		Form average	Neue Suche in HABEL auslösen	N
		Columns Ctrl+F3 Export für ERP-System	Suchen und Ersetzen ausführen Sh Entwicklungsauftrag erstellen Sh	ift+Ctrl+5 ift+Ctrl+6

In the context menu, the command *Execute external program* is available to do this (requirement: **HABEL SCRIPT for Searches**. Depending on the definition, you have various options for running additional programs. As in the example used here this could be initiating a new search in HABEL. A new search in HABEL is initiated with the value you right-clicked to open the pop-up menu (*in this example* Order number: – new search in HABEL with the criterion order number). It is also possible to start the separate module **HABEL SEARCH and REPLACE** via *Execute external program* to carry out a search and replace process for all dossiers containing the highlighted value.

External programs such as an ERP program or financial accounting program can also be opened.



User manual II. Retrieval Hit list

2. Using the contents of database fields

Additional functions can be accessed through the context menu in the hit list

Add up columns and calculate average

You can add up the values of columns, for example to determine the total of all invoices for a specific time period. To do so search for all invoices from a specific period and highlight all lines (CTRL + A). Now right-click the "Amount" column, and select the command *Column total*. The total of the highlighted lines is displayed.



Proceed in the same way to calculate the average from the column of highlighted lines.



	Pr <u>i</u> nt	1				
0	<u>D</u> isplay					
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×	D <u>e</u> lete					
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	Copy value to clipboard					
	Show log entries	-				
	Show post basket history	-				
	Create post basket entry					
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	Start workflow					
	Check signature					
۶E	Send as mail					
	Send as PDF-mail					
	Execute external program					
	Send dossier as link					
	Column total	1				
	Form average					
	Columns Ctrl+F3					
	Export für ERP-System					
	Save with document type					
	Expand all					
	Collapse all					
	Generate ERR entries					
	Combine documents	-				
3	<u>B</u> ack	-				



User manual II. Retrieval Hit list

WE CONVERT DOCUMENTS INTO ENERGY

Copy value to clipboard (1)

This command is only active if you have accessed the pop-up menu by right-clicking on a database field actually containing a value. This value is copied to the clipboard and can be reinserted at any location.

Export for ERP system

Use this menu entry to issue the database field contents of the selected hits as an index file for further processing, e.g. for the ERP program.

Generate ERR entries

This command allows the archived document to appear as an entry in the error list "List of missing host data" (the document exists, but the index/host data are missing).

Background:

The necessary index criteria are already available for many documents when they are captured by external programs such as an incoming invoice in an ERP program. HABEL can use this for indexing. The document is therefore only captured by entering a unique criterion (ideally a barcode that is automatically recognized while scanning and assigned to the document). At the same time, this barcode is captured by the ERP program. The index data are made available with the new criterion (barcode in this instance) from this ERP program. HABEL links the index data to the associated document, and thereby makes available completely and uniformly indexed documents. Documents that do not have any index data are shown in the error list "List of missing host data". If an entry is accidentally deleted, you can restore it (context menu of the hit list, command Generate ERR entries).



The entry appears in the "List of missing host data" and is accessible for merging. This can for example be necessary when an entry is in the "List of non-scanned documents", the barcode is correctly entered, and the document was found in the search. Perhaps the originally archived document was not a merged document type (e.g. cost accounting for invoice within the post basket changed), or the barcode is missing. An entry is not added to the error list since the following is being checked for this entry: Is it a merged document type? Is there a barcode? The document must be generated again as an ERR entry once the data from the search are corrected.



User manual II. Retrieval Hit list

Change fields

Database field contents can be modified using the **HABEL CORRECT** module and the appropriate access rights. The document itself does not change.

240101203	223013	//14/2009	DIGI-II
348761589	2256		DIGI-IT
04005	2281 🥯	Print	Informatica AG - Köln
04005	2281 🧕	<u>D</u> isplay	Informatica AG - Köln
04005	2281 👝	Information	Informatica AG - Köln
04005	2281 🚥	mation	Informatica AG - Köln
04004	2281 🗙	D <u>e</u> lete	Informatica AG - Köln
04004	2281	Setting	Informatica AG - Köln
04004	2281	Security	Informatica AG - Köln
04004	2281	Copy value to clipboard	Informatica AG - Köln
04003	2281	Show log entries	Informatica AG - Köln
04003	2281	Show log entries	Informatica AG - Köln
04003	2281	Show post basket history	Informatica AG - Köln
04003	2281	Create part backet entry	Informatica AG - Köln
04002	2281	Create post basket entry	Eeinmechanik Müller GmbH - 775
04002	2281	Change <u>f</u> ields	Auftragsnummer 775
04002	2281	Start workflow	Betreff
04002	2281	Start Workhow	775
04001	2281	Check signature	Belegdatum 775
14001	2281	A 1 1	Feinmechanik Müller GmbH - 775

To do so click on the *Change fields* command in the pop-up menu and e.g. order number. The fields that can be modified using this command are pre-defined and configured. You now get to another menu in which you can perform the changes. The new value is written to the database after you save it.

🛕 Change field		- = x
Auftragsnummer:	225615	
	Save	Cancel



User manual II. Retrieval Hit list

3. Document preview

In the hit list, you can set if you want to receive a document preview. The preview lets you determine if the document was the searched document. How the document preview is displayed can also be set according to the user.

	General (Ht. htt. Ver. / Ne Starth 1)									CH (C) #134								
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				in .	-		Sec. 1	1091			Per	mand previous	V De	Current pla	nier -	D.		

Hit list tab – Document preview group – More button

If a document preview is activated, the document of the selected hit is previewed. To display the document preview in full screen mode, press *F11*. Press *F11* or *ESC* to return to the overview. The preview settings are set in *all* tabs – *Action* in *Settings* – *General* of the *Extras* button.

If a document comprises several pages you can scroll through the individual pages of the document using buttons (forward-back) (1) or navigate to the first or last page (2). You can go directly to the desired page by entering the desired page

number (3).

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HA O A O	1 von 2	

Zoom within the document preview

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You can display parts of the document in more detail using the zoom function. To do this hold down the left mouse button to select the area you want to zoom in on. The "selected" area is enlarged into the preview complete window. Return the document to normal size by double-clicking the document in preview.



User manual II. Retrieval Hit list

Adapting the document preview

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Hit list tab - Document preview group

4	Fit width The document is expanded to the maximum width of the document preview.
	Fit height The document is expanded to the maximum height of the document preview.
	Rotate The document is rotated.
J D J	Zoom in/zoom out The document is enlarged or shrunk in the document preview.

Additional functions are available under the "More" button.

Fit to page

The document display is expanded to the entire page of the preview.

Original size

Display in the preview in original size.

Lighter/darker

For documents with a background form this can be made brighter or darker for display purposes.

Show inverse

The document is shown inverse (black becomes white and white becomes black).



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Inverse view of a document



User manual II. Retrieval Hit list

4. Add another document

If you have opened a dossier in the search you have the option of adding further documents to this dossier. You can use the HABEL-SCAN or the virtual printer, which is integrated in the HABEL-OFFICE Integration (see User Manual I. Capture programs).

Search the desired dossier by entering the search criteria, and start the search by clicking the *Find* button or CTRL + F. Highlight the hit in the hit list by clicking on the respective entry. Click the *More* button – *Add document to dossier* to either start the archive printer, if you want to add an electronic document or choose a scanner to start the scanning program for the archiving of a paper document.

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Hit list tab – Edit group – More button

The usual document capture program for entering the relevant search terms is opened. The fields already contain the values from the original dossier, but they can be modified and added to.



When you subsequently retrieve the dossier by entering the search criteria in the retrieval process you will find two entries.



User manual II. Retrieval Hit list

5. Combining operations

For combining single entries to operations, the function Combining operations was developed.

Examples for use:

- Additional documents incur and have to be archived later.
- Delivery notes and invoices have to be seen as one operation.

To combine operations, virtual groups are created. They can be created either manually or through a special development also automatically. For the manual combining at first the command has to be activated.

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User manual II. Retrieval Hit list



As a second step, the results are to be highlighted and summarized in a virtual group over the context menu *Combine operations*.

The display, in which group the documents are, is evident in the footer.

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User manual II. Retrieval Hit list

If documents, which already belong to a group, are combined, a query is executed whether the document should be added one of the groups or a new group should be created. It is also possible to remove documents from groups and to search summarized documents. The function is available via the context menu. If documents should be shown or edited (mode display or information) they have to be part of the hitlist and not only shown in the category *combined operations*. Therefor the function Search combined operations can be used. The function is also available via the context menu. If the function is used there will be a search in the background for all these documents. They will then be shown in the hit list and can be used for display or the information.

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User manual II. Retrieval Document display

Document display

To display a document from the hit list, click the *View* (1) button within the *Hit list* tab – *Edit* group, or double-click the hit list entry (2).



Hit list tab - Edit group - View button

If you have activated document preview you can use *F11* to switch to document display in full screen mode. If the document consists of multiple pages, the page is displayed that is currently selected in the preview. When you switch from the hit list to the display, the *View* tab is activated. Various additional functions are available in the document display.



View tab



User manual II. Retrieval Document display

1. Settings

Adapting the document display

The document display can be adapted as in the document preview:

4	Fit width The document is expanded to the maximum width of the document preview.									
	Fit height The document is expanded to the maximur preview.	n he	eight of the document							
Ē	Rotate The document is rotated. Rotated documents can be saved in the document display. The command can be found in the <i>View</i> group – <i>More</i> .		More Pedaction Document preview Fit gage Original size Brighter Ctr Darker Ctr Show inverse Ct Copy Mark Save document rotated Save adjustment	H4 H+H H+D H+1						
J J	Zoom in/zoom out The document is enlarged or shrunk in the	doc	cument preview.							

In the *View* tab – *View* group - *More* button, you can find numerous functions that can be used like the document preview: Fit page, original size, brighter, darker, and inverse.







User manual II. Retrieval Document display

Save adjustment

You can adjust the height, width and page fit of the document for display. To save the setting for future document displays, go to the *View* tab – *View* group and select the relevant menu item within the *More*



button. You can also save this setting only for this specific type of document (you will be prompted to confirm this after selecting the command).

Save adjustment		X
Save with d	ocument type	
Clear	ОК	<u>C</u> ancel

You can reset this setting by clicking the Delete button.

Copy - Mark

In addition, passages can be cut out of the document and used in other applications. Use the command *Mark* and *Copy* that can also be found under the *More* button.



You will obtain graphical elements only and cannot copy any text contained in a TIFF file for further editing.

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Datum	26.05.10
Kunde	26160
Betreuer	Karin Beck
Telefon Betreuer	0 74 61 / 93 53 - 18
E-Mail Betreuer	kbeck@habel.de

Mark

Copy and paste

By the way: The marking function can also be found in the View tab as a button.

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(Debut Local Terrigi Hallar) (HHARE), CON 20025007-200

User manual II. Retrieval Document display

Additional functions in the More button

TIFF-Info and Cold-Info

Example (using TIFF-Info)

Show with background form (CTRL + W) If you are using the module **HABEL DYNAMIC FORM DEPOSIT** you can show the appropriate background form with the document, e.g. correspondence archived without letter headed paper. If desired, this can be shown by selecting the command **Show with background form**.

Additional information (CTRL + Z)

Select the command Additional Information to display the additional information appended by HABEL ACCOUNT ASSIGNMENT STAMP.

Mose information

Cillherd ANES75-2 Apr File date + 35/57 (2011

Height = 3507 pixels Color depth = 1 bits

Horizontal resolution = 300 dpi Vertical resolution = 300 dpi

Current page = 1 of 1 File format = Raw FAX with CCITT group 4 compression (29) Width = 2480 pixels

OK:

Size in conventional memory = 1094184 bytes File size = 26314 bytes

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Check signature



Only active if you are using the <u>HABEL</u> <u>ELECTRONIC SIGNATURE</u> module and are working with signatures. You will receive details separately when you are instructed in the use of <u>HABEL</u> <u>ELECTRONIC SIGNATURE</u>.



User manual II. Retrieval Document display

Display functions in the document display

To scroll through the document or zoom in, there are additional buttons that are available in the *View* tab – *View* group.

(A) (B) =		General [Display]		
Search Hit list	View Information			
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Functions	View	Annotati	ons	Action

View tab - View group

	You can enlarge areas of the document display using the cursor. Holding the mouse button down, draw a frame around the area to be enlarged. When you release the mouse button this area is enlarged.
4	You can use this function to move the document display from top to bottom and bottom to top if the document extends over the monitor size. To do so click in the document and move the cursor up or down with the mouse button held down.
\mathbf{P}	If you have activated the magnifying glass symbol any areas you move over with the mouse will be shown enlarged. To do this click on the areas you want to see enlarged.



User manual II. Retrieval Document display

2. Options for editing archived documents

In the *View* tab, there are various options for working with the archived document (print, send by email, affix notes, etc.).



The original version of the archived document is not changed; only the associated database entries are changed. With reference to the annotations, information is placed on the document that is also displayed while loading.

Print

The currently displayed document can be printed out by clicking the printer symbol. Depending on settings you will be asked about various options (printout with text: then the background text e.g. "archive print" is also printed on the document; print annotations: the attached information such as notes is also printed etc.).



View tab - Functions group - Print button

Press the Print fax icon to operate the fax machine (requirement: fax printer driver).

Save attachments and dossier

You can save attachments and documents from the archive. Click the Save button in the View tab – Functions group to save a dossier (document) in TIFF format, or you can alternately click the menu item of the Save button (1).

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View tab - Functions group - Save button



Below the button further functions are available (2). Dossiers that have attachments (such as emails that are displayed condensed) can be saved separately by selecting the menu item *Save mail attachment*. After the command is selected, define the directory in which you want to separately save the attachment(s) of the displayed document. To save the displayed document, select *Save document* or, to save it as a PDF: *Save document as PDF*.



User manual II. Retrieval Document display

Send as email or email as pdf file

You can also send the searched document by email if you are using the module **HABEL E-MAIL Dispatch**. Use the *Send* button. The email program opens and creates a new email with the displayed document as an attached file. If you want to send the entire dossier, go back to the hit list, select the entry, and press the *Send* button in the *Hit list* tab – *Edit* group.



View tab - Function group - Send button

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	Search	Hit list	View	Information	
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			Edit		

Hit list tab - Edit group - Send button

If you define in the settings (mail settings) under *Extras* to display a selected page, you will be asked which page will be the email attachment if the document has multiple pages



The commands can also be accessed by right-clicking the context menu.



In addition, documents can be sent in PDF format by selecting the menu item under the *Send* button. Corresponding licenses are required to do this. The hit that you want to send is automatically converted to a PDF file in the email, provided these are TIFF documents. Files that are archived in original format will be attached again as such.

₩ E S	end 👻
١ ١	Send as mail
	Send as PDF-mail



User manual II. Retrieval Document display

3. Affix annotations

Various annotations can be affixed tot he document in the document display:

- Notes
- Texts
- Markings
- Editings
- Stamps

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View tab - Annotations group

The following functions can only be used in conjunction with the module **HABEL ANNOTATIONS** and are also only active in document display mode.



The original document is not changed but stays in the archive in its original form (once only). The appended notes etc. are saved separately in the database linked to the document.



User manual II. Retrieval Document display

0

Active

To change comments (also called annotations) on the document you have to be in editing mode (active). To do so click on the icon; the document gets a red frame. You can now change comments as long as you have the appropriate authorizations.







Text marker

With this function you can mark (highlight) any passages in the document by holding down the mouse and drawing a frame around the areas to be marked (1+2). The default setting for the markings is yellow, but you can customize this using the pop-up menu. The foreground color changes the font color, the background color changes the fill color (3).





User manual II. Retrieval Document display



Notes

Use this icon to attach notes to the document. Attach a note to the document by holding down the mouse button and drawing a frame on the document. The note is already preconfigured with your name and the compilation date and is ready to record information.

(n) + General [Display] Hit list View Information Search 😹 Fax Druck 🔯 Print: Fit width 🛛 🖉 Zoom out. Note Ð Et height 🖉 Zoom in Mill Send > Tot I Save -11/ Action Rotate More -Z Change into S More. -& Redactio Fa Vie A Created by: Habel system user On: 10/17/2011 At: 13:32:57 No reduction allowed. WIR MA



Text

If you just want to add passages of text to the document you can use this function to compile free text.





User manual II. Retrieval Document display



Redaction

To cover certain areas, use the edit function by clicking this symbol. To do this hold down the mouse button to draw a frame round the area you want to conceal. You can choose any color (for example if you choose white the concealed area appears "invisible").

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Stamp

Use this icon to apply stamps to the document. The stamps available are predetermined. The individual stamps can be accessed via a selection box. To apply the stamp select your required stamp and use the mouse to drag it to the document into the correct position and size.

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User manual II. Retrieval Document display



Save

All comments attached to the document have to be saved using this icon. If you do not save these annotations before moving on to the next document or switching to the hit list you will be asked if you want to save the data.

Confirm	х				
Data not yet saved! Save now?					
Yes No Cancel					

Reload

By using the *Reload* command, the last annotation attached and deleted is restored (provided it has not been saved in the meantime).

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	<u>С</u> ору	
	<u>R</u> eload	
	Page settings	2
	Overview	
	S <u>h</u> ow versions	

Page settings

To print a document, the default settings can also be deactivated on a one-time basis via the page settings function. A selection box appears with information on text and notes and how they are to be processed in accordance with the default print settings. If, for example, you do not want to include the text or notes for this particular print job, although the setting is configured to include them, untick these items. The default settings will apply again for the next print job.

🕵 Seiteneinstellung	-		х
✓ Notiz Erstellt von: Systembenutzer Habel Am: 27.05.2010 Um: 16:49:06 Lieferung bitt ✓ Text Erstellt von: Systembenutzer Habel Am: 27.05.2010 Um: 16:49:17 Kunde hat re	e ausführen klamiert		
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User manual II. Retrieval Document display

Overview

If you are using *Overview* you can search the hit lists for documents that have a note or text appended to them. Select all the entries of the hit list (CTRL + A), and open the command *Overview* in the *Display* tab – *Annotations* group – *More* button.

You will get an overview of the documents with attached comments. The overview also shows what type of comment it is (text, note), who made it and what its content is.

	overview			-	х
1	File View				
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	11	Note	Created by: HABEL system user		
	Created by: HABEL system u On: 10/17/2011 At: 13:49:53	iser 3			

Double click on the entry to go directly to the document on which the comment is attached.



User manual II. Retrieval Document display

Show versions

The Show versions command is only active if there are annotations with different versions on the document. By clicking on the respective version information you will see this displayed on the document as originally applied.



Hide / show annotations

By clicking on this icon you can hide and show all annotations applied to the document such as notes, highlights and stamps.





User manual II. Retrieval Document display

Pop-up menu in conjunction with annotations

When you attach annotations to the document you also have access to a pop-up menu for editing these annotations. The settings apply only to the selected annotations. If other settings are generally applicable, this can be defined in all tabs by the default setting in the *Extras* button – *Settings* menu item.

Notes



Delete removes the attached note, the tick beside the "Edit" command shows that the editing mode is active for the note. Properties allows you to change the foreground and background color and the size, type and color of the font.

Redaction

Delete ✔ Edit	
Redaction properties 🔸	Foreground colour
Show versions	Background colour

Text



Delete removes the attached note, the tick beside the "Edit" command shows that the editing mode is active for the note. The foreground and background color can be modified via Properties.

Delete removes the attached note, the tick beside the "Edit" command shows that the editing mode is active for the note. Properties allows you to change the foreground and background color and the size, type and color of the font.

Stamp



Delete removes the attached note, the tick beside the "Edit" command shows that the editing mode is active for the note. You cannot make adjustments to the stamp as it is a graphics file.



User manual II. Retrieval Document display

4. Logs and history

Show post basket history / create post basket entry

When using the **HABEL POST BASKET** module, there are two additional functions that are available in the document display. Using the command *Show post basket history*, you can display a history of the document in the post basket (the route taken by the document through the company). To generate a new post basket entry from the search, use the command *Create post basket entry*. You can find additional information in *User Manual III. Post basket*.



View tab- Functions group - More button





With the *Hit list*, these functions are also available under *Edit* – *More* and also within *Information* under *Information* – *More*.



User manual II. Retrieval Document display

Show log entries

Provided you are using the module **HABEL STATISTICS** the actions performed with a document are logged (display, information, print, email dispatch, etc.). Display the log using the command *Show log entries*. You will be given an overview of which actions have been performed by which user with this dossier/document.



View tab - Functions group - More button

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2400021 0 2/23/2009 09/40:11 Habel Show 2400021 0 2/23/2009 10:00:17 Habel Show 2400021 0 2/23/2009 13:31:24 Habel Show	240	10021	0 2/23/2009	09.44.44	Habel	Show	
2400021 0.2/23/2009 10.0017 Habel Show 2400021 0.2/23/2009 13.31.24 Habel Show	240	10021	0 2/23/2009	09.48:11	Habel	Show	
2400021 0 2/23/2009 13.31.24 Habel Show	240	10021	0 2/23/2009	10:00:17	Habel	Show	
	240	10621	0 2/23/2009	13:31:24	Habel	5 how	
2400021 0 2/23/2009 13 32 13 Habel Show	240	10021	0 2/23/2009	13:32:13	Habel	Show	



With the *Hit list*, this function is also available under *Edit* – *More* and also within *Information* under *Information* – *More*.



User manual II. Retrieval Document display

5. Printing of text lines

During the document capture process information is printed at the top margin of the document. The fields concerned are predefined and configured. This might be information such as the input barcode and the date of capture.

🥪 Print 🔚 Save →	Fax-Druck		Fit width	🔎 Zoom out 🏓 Zoom in	Active	T
Change info Fund	tions	1	Rotate View	More., 🔻		Annotatio
Ва	rcode:		SCAN-Dat	:um: 17032	008	

6. HABEL-ACCOUNT ASSIGNMENT STAMP

If you are using the **HABEL ACCOUNT ASSIGNMENT STAMP**, you can retrieve the account information captured on the dossier in the *View* tab. The data shown as account assignment are predefined. This display is often used in conjunction with incoming invoices that have to be assigned to various cost centers.

Į	🕵 Kontierungsinformation zu	1:			9590		x
	Beleg Nr	Document date	Kunden-/Lieferanten Nr	Einzelpreis			
	>	7/22/2009	70527				
	-						
Г					_		_
					<u>_</u> [ose	
L							

When printing you will be asked whether you also want to print the additional information (account assignment) on the document.

Confirm	>	2
?	Print document(s) with additional information?	
<u>Y</u> es	No to <u>A</u> ll Yes to A <u>l</u> l	



User manual II. Retrieval Document information

Document information

The information mask can be opened from the hit list. This is where all values from the database fields for the selected dossier are displayed.



Hit list tab – Edit group – Information button

	and the second second	And in case of	6	tional (Dri	formation)	The Party of Concession, Name	CHE MAR
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	The second s			-			
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the state of the	Comment Comment	And Annual Property lies	The second	12108			
Information			Section.				
Company	2 01 HABEL GmbH &	Co.KG		÷	Article No.	/ 10090	10 C
Document type	/ 0005 SLS Order confin	mation		- 2	Article name	✓ WORM-FLATTE FLASMON 5,3 GE	2
Document date	/ 05/21/2009		1		Seriel No.	1	
Document No.	1				Esternal Document No.	/ 600543	
Offer No.	/ 100202				Currency	/ BR	
Order No. (Internal)	/ 225612				Total clear arrow	/ 470,00	
Delivery Note No.	¥ 300495				VAT 29%	1	
Invoice No.	/ 401490				Tetal-gress amount	/ 359.30	
Customer/Supplier No.	/ 22107				Project no.	/ 000021	3
Name	/ INTERCONNECT AG		19		Project description	/ HABEL Dokumentermanagement	1
PLZ	/ 80668				Delivery data	1	1
Location	/ MÜNCHEN				Message ID	1	
U(Z	/0				Access to PK	3400002	
Salesperton	1				Archiving date	05/01/2006	THE
Subject	1				Offer existing?	1	
lefs .	1				Order existing?	1	· · · · · · · · · · · · · · · · · · ·
					Order-confirmation?	1	
					Delivery note existing?	/	
					Involte existing?	1	· -
					Release 1	10	
					Referent 2	15	
					Letzte Änderung ilunch	1	
Article no.		Artikefires					
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Copyright IS 1996-2011 by HAREL Gro	bH & Co. K.S. TOKER Rathery WY	deal dealers 1 of 1					Distantion of the

Document information



User manual II. Retrieval Document information

The Information tab has several functions for editing the database fields.

Printing and viewing

Select *Print* to print out the document from the current dossier. Select *View* to view the dossier.



Information tab – Information group

Change

If you are using **HABEL CORRECT** and have the authorization rights to edit database fields, you can make changes to field contents or delete items in the information mask. Which fields can be changed, is marked by the editing pen.

Company	
Document type	🖌 0005 SLS 🦉
Document date	/ 05/27/2009
Document No.	1 1 1
Offer No.	100202
Order No.(internal)	225612
De Note No.	200406

It is possible to configure, that only the info field can be changed without using the module **HABEL-CORRECT**. So only this field will be provided with an editing pen – as long as you have the access rights.

With *Change* the editing mode will be activated. You can execute the changes by clicking in the input fields. The changes will be saved with *Save* or cancelled with *Cancel*.



Information tab - Changes group



User manual II. Retrieval Document information

Pressing *save* opens a window which contains all the changes you have made. Here you can check whether the changes, and also the allocations, were correct.

If you choose "Process" for the changes, the change will be executed for the whole process. If you choose "Item", the change is only valid for this position. Alternatively you can also choose "None", whereby the position will be excluded of the change.

🕵 Save changes				- = x
Description	Field name	Old value	New value	Change
Customer/Supplier No.	KuLiNr	23317	70735	Item
Name	KuLiNam	Interconnect AG	HABEL GmbH	Item
PLZ	PLZ	80668	8212	Item
Location	Ort	München	Neuhausen am Rheinfall	Item
LKZ	LKZ	D	СН	Item 👻
				None Item Process
		Save		Cancel

Editing items

Add item is used to make changes to the dossier items, e.g. add more items. To add items activate the "add" mode. The other buttons change.



vor Klick auf die Schaltfläche Position hinzufügen

🔇 Cancel	Ø	5	E.
Add 🛃	Change	Delete item	Add item

nach Klick auf die Schaltfläche Position hinzufügen

Other items can now be added to the corresponding fields by entering terms or by master access if they are fields with master access. Please note that the fields with master access have to be cleared before entering new terms into them. Click *Add*, and the new entry can be seen in the item box.

	Article no.	Artikelbez.
	10099	WORM-Platte Plasmon 5,2 GB
	10099	WORM-Platte Plasmon 5,2 GB
>	10418	CD-Writer

Item box



User manual II. Retrieval Document information

If you want to delete individual items, select the item and click the button *Delete item*. You will be asked whether you really want to delete the item. If you select yes, the entry is deleted.





If you select several entries in the hit list and switch to Information, you can change back and forth between the individual entries with the *Forward* and *Backward* buttons.



Information tab - Information group - Forward / Backward button



II. Retrieval Export functions

Options / settings

All tabs contain the *Extra* button under the *Action* group. Various setting options are available under this menu item.



All tabs - Action group - Extras button

Save menu settings / Reset menu settings

If you make changes to the menu (such as additions to the quick access bar or minimized display of the multifunction bar), save them with the command *Save menu settings*. They can be recessed with the command *Reset menu settings*.

Reset docking settings

To reset settings concerning the docking of windows, the command Reset docking stations is provided.

Run NetViewer

The command *Run NetViewer* automatically starts downloading and running the NetViewer that is used by HABEL employees to contact each other at their workplace and make arrangements or provide help.

Information

In the *Information* command, you are provided with additional details on your system version and important information.



II. Retrieval Export functions

1. Settings

General

Settings		Х
General Display Hit list Print settings Mail settings Style	General Application Close program with X Always on top Save history upon closing	

All tabs- Action group - Extras button - Settings menu item

In the General window, you can make general settings such as

• Close program with X

You can define whether the entire search program closes when you click on X within the hit list, or whether only the page with the hit list is closed and you are returned to the search input mask.



The selected function continues beyond the end of the search.

Always on top

If the function is activated, the search always remains active in the foreground, but it can also be minimized. Note: The selected function continues beyond the end of the search.

• Save history upon closing (search history)



II. Retrieval Export functions

General – Document group order

Settings				×
General Document group order Keyboard shortcuts External programs Displau	Doc o L	<mark>ument group o</mark> Iser name	rder © Global	
P · Display Im Hit list P · Print settings Im Mail settings D · Style	No. 01 02 03 05 06 07 08	Caption General Personalmanagemen Freight forwarding Vertragsmanagement Adata Lohn/Persona Hotel DIV	it t	

All tabs - Action group - Extras button - Settings menu item

The order of the databases in the selection box can be varied without having to modify internal numbering. The selected group is moved up and down by pressing the arrow symbols (you can alternately use drag & drop). The selected sequence is saved by clicking OK and transferred to the archive selection.

Using the User/Global buttons, the administrator can determine a sequence that applies to all users.



II. Retrieval Export functions

General Document group order	Keyboard shortcuts			
 Keyboard shortcuts External programs 	Commands			
Display Hit list	Caption	A Keyboard shortcuts	Keytip	
Print settings	&About		l	
Mail settings	&Add		AR	
Style	&Brighter	Ctrl+H	BM	
	&Cancel		С	
	&Change		EI	
	&Change info		EI	
	&Clear		С	
	&Cold info		CI	
	&Copy		С	
	&Darker	Ctrl+D	BL	
	&Display		D	
	&Increase /+	+	US	
	&Mark		м	
	&Mark		BOM	
	&Note		AN	-
	Editor		Image	
	KouTio			
	ChestCut (Nana)			
	Shorteat (None)			
			Reset	

General – Keyboard shortcuts

All tabs – Action group – Extras button – Settings menu item

You can define own shortcuts for the quick call of commands with the editor. Choose the corresponding command in the table. The definition or edit of the shortcut is executed in the editor. Under KeyTip you can enter the combination of letters / numbers, which will be visible in the menu by

pressing the ALT button. The literal hot key will be defined as shortcut. If you enter a shortcut, which is already used, an error message appears.

The settings will be saved user-dependent.





Shortcuts, which are used by other applications, e.g. MS Office, cannot be considered.



II. Retrieval Export functions

General – External programs

Settings		X
 Settings General Document group order Keyboard shortcuts External programs Display Hit list Print settings Mail settings Style 	External programs Definition of external viewers	×

Definition external viewer

You have the possibility of setting different viewer programs, which shall be used for the display or print of the archived files, over an editor access. Example: You want to open rtf-files (created in Wordpad) with your MS-Office Word. For this just erase the Semicolon out of your setting file (semicolon means, that the following information will not be considered). Afterwards you add the file extension and the program to open it (command).



II. Retrieval Export functions

Display

General Document group order	Display	
 Keyboard shortcuts External programs 	Settings	
Display Hit list Print settings Mail settings Style	Optimize document-display? E Keep zoom settings?	
Style		

All tabs - Action group - Extras button - Settings menu item

In the View window, you can make settings for the view such as

Optimize document display

Scale to gray means to display the document in grayscale, which allows a better quality image on the screen (if this box is not ticked the display will be in black and white).



with document optimizing

without document optimizing

Keep zoom settings

If you want to display the same area enlarged over several documents, you can save this setting. These setting remains active for all documents you have highlighted in the hit list and shown in document display, so that you can leaf through several documents comfortably in zoomed condition. To return to normal view from the zoom setting just click on the document. Zoom settings remain active until the command is deactivated.



II. Retrieval Export functions

Display – Document preview

- General - Display	Document preview	
- Document preview - Hit list	Preview	
Print settings	Preview-interval	
· Style	1000	
	Document-preview page-count	
	0	
	Print message, when reaching this limit?	

All tabs – Action group – Extras button – Settings menu item

With the preview-interval you can set, after how many milli-seconds the selected document will be displayed in the document preview. That means: after how many milli-seconds after you have highlighted the hit (by clicking or with the arrow keys) will HABEL begin to display the document.

If you e.g. want to move fast through the hits by using the arrow keys and only sometimes want to display the document, it is enough to set a higher interval value. Using a low interval value the document will be displayed very fast. This causes a "nervous" document preview, because the document will be displayed immediately, even if you only wanted to pass over them.



If the documents are not in the cache directory (but e.g. on a jukebox) and the interval will be adjusted very low (<1000 ms), almost every document will be recognized as identified while you scroll through the hit list. For each identified document a query will be sent to the Jukebox to deliver the document. This slows down the performance).

Document preview page count

This is where you can define how many pages are to be loaded into the document preview and which can then also be displayed in the document preview using the navigation function. 0 means <u>no</u> limit. It is worth setting limits here if documents with a large number of pages, such as extensive accounting journals, are likely to occur as hits, because all pages are prepared for display in the document preview and this results in a long loading time.

If the settings are such that a message appears when the page limit is reached, this will look as follows when selecting the hit (with more pages than the preset limit):





Use the display button to access **all** pages of the dossier in the preview.



II. Retrieval Export functions

Hit list - General

💽 Settings	x
⊳ · General ⊳ · Display	Hit list
Hit list ▷ · Print settings	Hit list
l Mail settings ⊳ - Style	Sorting is case-sensitive
	 Collapse hit list after search Show a goup's hit-count
	0 Hit-count format
	Filter
	Filter case-sensitive
	Activate filter
	Hit
	Show items in hitlist
	3000 👻 🗘 🔺 Maximum hit-count
	Show mail condensed
	Combine documents
	1000 • Combine documents •
	Save Cancel

All tabs – Action group – Extras button – Settings menu item

General

• Case-sensitive sorting

If this function is not activated (checked), the sorting procedure does not take into account if the field contents are upper or lower case.



II. Retrieval Export functions

 <u>Collapse the hit list after searching</u> If this function is activated, the hit list minimizes after the search is triggered if the grouping is activated based on a database field.

Τ				Document type 🗸	Document date	Project No.	Custo
	ocument type	Order confirmation No.	5.	🖃 Document type	Name : Supplier	Order confir	mation
1	 Document type 	Name : Doku-Editor	0	0015	7/8/2009	900221	70527
	+) Document type	Name : Drawings		0015	7/3/2009	900221	70528
-	Document type	Name : Einance Invoice:	1	0015	1/18/2008		66666
+	Document type	Name : SI S Corresponden		0015	2/18/2008		6666
-	Document type	Name : SLS Corresponden		0015	2/21/2008		66666
+)	Document type	Name : SLS Delivery note		0015	1/10/2008		777
+)	Document type	Name : SLS Enquiry		0015	2/18/2008		7777

minimized View

expanded View

• Show number of hits in the group

If this function is activated, the number of hits per group appears in the hit list (00 stands for two decimal places).

locument type Name		
Document type T Document date Document type Name : Suppler Document type Name : Suppler Document type Name : Suppler	Project No. [Customer/Suppler No.] Order confirmation No. Name Order confirmation (07) Order (08) Offer (10)	Location
Settings General Display Hit list Print retings Mal cettings Style	Hit list Hit lat If Sofing is case-so where Collapse hit on after search If Show accoupts hit count	Hill court formal



II. Retrieval Export functions

It is possible to prefix alpha-numeric signs, so that you can enter here e.g. "Quantity = 00" and see this result.

[Document type Name 🛛 🖓	
		Settings
*	Document type 🗸 Document date Project No. Customer/Supplier No.	
>	+ Document type Name : Supplier Order confirmation (Quantity=07)	Dieneral Hit list
	Document type Name : Supplier Order (Quantity=08)	- Display
	Document type Name : Supplier Offer (Quantity=10)	Print settings Hit list
	Document type Name : Supplier Invoice (Quantity=04)	Mail settings
	Document type Name : Supplier Enquiry (Quantity=13)	Style
	Document type Name : Supplier Delivery note (Quantity=09)	Collapse hit list after search
	Document type Name : SLS Order confirmation (Quantity=33)	Show a goup's hit-count
	Document type Name : SLS Order (Quantity=01)	
	Document type Name : SLS Offer (Quantity=32) ■	

Filter

Case-sensitive filtering

If this function is not activated (checked), the filter does not take into account if the field contents are upper or lower case.

- <u>Reset filter for new search</u> If this function remains activated, the filter stays active even when a new search will be executed, so that the results may be limited.
- <u>Activate filter</u> By using filter functions, the selection within the hit list can be made clearer. If you do not want to use the filter, you can deactivate it here.

Hits

- <u>Show items in the hit list</u> By activating this field, items will also be displayed in the hit list.
- Maximum hit-count

For setting the maximum number of hits in the hit list. This can shorten the search time when searches are performed that yield a very high volume of results. If more hits arise than the maximum number of hits, a message appears.

Compression

• Show mails condensed

If this function is activated, archived emails will be displayed condensed. E-mails will be archived for one as a TIFF file, as well as the original file (in MS-Outlook, Lotus Notes version 6, Mozilla Thunderbird). If *Show mails condensed* is selected, the e-mail is displayed as one hit in the hit list.

Document t 🛇	Document type Name	Document date	Customer/Supplier No.	Name	Location
0033	SLS Correspondence	10/10/2011	00001	HABEL GMBH & Co. KG A	Rietheim-Weilheim



II. Retrieval Export functions

With condensed displayed e-mails (if the archiving took place in the original format, with or without attachments) it is still possible to open the e-mail in the original format. If you display the item and open by double-clicking the file displayed separate. The e-mail can then be processed again (answer, forward, etc.)

notations Action	T 2	Extras Back Close
	notations	Action

- Company	Annerlungen	Extras	Zurück Beenden Aktion
		^	00115051.001 200115052.001

Document display condensed mails

Document display condensed mails with attachment

If the function Show mail condensed is deactivated, the e-mail will be listed with several hits (depending on the configuration either as a TIFF-file and original file or as TIFF file and separate the attachments.

Document type (1) 🗸	Document type Name (2) 🗸	Document date	Project No.	Customer/Supplier No.	Name	Location	File extension
0033	SLS Correspondence	10/10/2011		00001	HABEL GMBH & Co. KG A	Rietheim-V	
0033	SLS Correspondence	10/10/2011		00001	HABEL GMBH & Co. KG A	Rietheim-W	MSG

Display of a not condensed mail in the retrieval (as TIFF-file and original mail)

	0033	VK Korrespondenz	22.09.2009	00001	HABEL GMBH & Co. KG A	Rietheim-Weilheim	
	0033	VK Korrespondenz	22.09.2009	00001	HABEL GMBH & Co. KG A	Rietheim-Weilheim	DOC
Γ	0033	VK Korrespondenz	22.09.2009	00001	HABEL GMBH & Co. KG A	Rietheim-Weilheim	PDF

Anzeige in der Recherche als nicht verdichtet (in Form TIFF-Beleg und Anhänge separat)

Combine documents

<u>Show combined documents</u>

Here you can also activate, that combined documents will be displayed.

• Document viewing delay

Here it is activated after how many milliseconds, when scrolling the hit list, it shall be displayed whether there is a combination for this document or not.



II. Retrieval Export functions

Print settings

All tabs – Action group – Extras button – Settings menu item

A selection is available for defining the default printer for printing.

Print settings – Archive print

Settings	
⊳ General ⊳ Display 	Printarchive
 Print settings 	The following text can be printed on the document
- Printarchive	Text
- Automatic printing	ARCHIVDRUCK
Miscellaneous	
Mail settings	Print text?
p · style	Always
	Never
	O Upon request
	Document type
	Print COLD?
	Print documents/graphics

All tabs – Action group – Extras button – Settings menu item

The administrator can define which text is printed on the document (*in this case*: ARCHIVE PRINT). In addition, it is determined if the text specified by the administrator is printed always, never, or upon request. This can be selected by the user. This same applies when printing COLD documents or for documents archived in another way.



II. Retrieval Export functions

Print settings – Annotations

Settings	
⊳ General ⊳ Display	Annotations
 Display Hit list Print settings Printarchive Annotations Automatic printing Miscellaneous Mail settings Style 	Animotations When should annotations be printed? Always Never Upon request The following annotations are taken into account while printing: Note Text Redaction Marker Stamp

All tabs – Action group – Extras button – Settings menu item

Notes, markings, etc. can be applied to the document using the additional module **HABEL NOTE plus**. In the menu item *When should comments be printed?* you can set whether these comments are also to be sent by email (always, never or on request). In this menu, you can also define which of the comments will be printed.

Display	Automatic prin	nting	
Hit lat Print settings Printarchive Annotations Automatic nantra	Pint into line	Pint accounting into	Print header?
	Never	Never	W Never
Miscellaneous	Printarchive	Print mail	Pint background
Mail settings	C Always	C Always	C Always
ityle	Never	Never	 Never
	Print ennotations	Printee	- 18
	Ahvans Never	Microsoft XPS Docum	ern Winter

Print settings – Automatic print

All tabs – Action group – Extras button –Settings menu item

Unless it is defined that as part of HABEL CONNECTION plus the document will not be displayed but immediately printed, the same settings as for the archive printer are possible. Moreover, the option *Print annotations* and a printer selection for the direct printing can be used. It should be noted here that the only choices are *print always* or *never print*.



II. Retrieval Export functions

· General · Display	Miscellaneous		
 Hit list Print settings Printarchive Annotations Automatic printing 	Print info line Always Never	Print accounting info Always Never	Print header? Always Never
Miscellaneous Mail settings Style	Print mail C Always	Print background Always	
	 Never Upon request 	 Never Upon request 	

All tabs – Action group – Extras button – Settings menu item

Print settings - Miscellaneous

The headline presents the content of a information field. You can use the Print headline menu to determine whether the content of the information field is never to be printed, always to be printed or printed on request.

If your document has been provided with account information via the extra module HABEL ACCOUNT ASSIGNMENT STAMP you can determine in the Print account assignment information whether this account information is to be printed (always, never, on request). Detailed information on the HABEL ACCOUNT ASSIGNMENT STAMP can be found in the section Document display - HABEL ACCOUNT ASSIGNMENT STAMP.

Likewise, you can determine in the Print header menu whether the header is to be printed (always, never or on request). This header is only active when the additional HABEL TEXT LINE module was purchased and is composed of the defined database fields.

If the archived document is an email, you can define in the Print email with attachment menu whether any attachment is also to be printed (always, never or on request).

If you are using the additional module HABEL DYNAMIC FORM DEPOSIT the background form can be used on request. In the Print background form menu, set whether the background form is also printed out while printing (always, never or upon request).



II. Retrieval Export functions

Email settings

Settings		
⊳ · General ⊳ · Display	Mail settings	
Hit list	Settings	
Print seturgs Printarchive Annotations	Allow selection of pages	
Automatic printing Miscellaneous	When should annoations be added when sending mail?	
-Mail settings ⊳ Style	 Always Never Upon request 	
	When should annotations be added with colors?	
	O Always	
	 Never Upon request 	
	When should the background be taken into account when sending mail?	
	C Always	
	 Never Upon request 	

All tabs - Action group - Extras button -Settings menu item

Under the menu item Settings – *Display selected pages*, you can specify when sending email (requirement: the additional module **HABEL E-MAIL Dispatch**) which pages of archived multipage documents will be sent. If comments are added to the sent mail, you can also set in the menu if the comments are to be colored and if background should be included (always, never, upon request.



II. Retrieval Export functions

Style

General Display	Style	
·Hit list ·Print settings	Presentation	
Printarchive Annotations Automatic printing	Ribbon Available skins	
Mail settings	Office2007Blue	•
Mai seungs Style		

• Multi-function bar (Ribbon)

Change between the display in the menu / tool bar and the multi-function bar (ribbon). To activate the selection you have to restart the retrieval.

Available skins

The user interface can be displayed individually. Depending on the selected style sheet, the colors and symbols are represented differently in the masks.



II. Retrieval Export functions

Style – Layouts

 > General > Display → Hit list > Print settings → Mail settings ▲ · Style ↓ · Annotations 	Layouts	
	Layout • Trefferlisten • HabelMono • Habel • HabelMono • Habel • Habel • Habel • Habel • HabelInputtemplate • Delete layout • Delete layout	
	Assign Hit list	
	HabelMono	Ŧ
	Selection window	
	HabelMono	-
	Input masks	

All tabs- Action group - Extras button - Settings menu item

This is where the layouts for the graphic representation of the hit list are defined and are available for editing. Here you can make settings concerning colors, fonts and font sizes of all components of the masks. For this you can choose the Layout and work on it by pressing *edit layout*.

Which layout has an effect in which component, is to be defined over *Zuweisen. It can be defined differently for the hit list, the selection window and for the caption masks.*



II. Retrieval Export functions



To create a new layout, you have to copy an existing layout (1). Afterwards you have to choose the respective fields, backgrounds, etc. Over Bitmap (providing of images), Color (providing of colours (3+4)) and Font (providing of fonts) you can define the layouts. You receive a preview of your changes within the preview window.



II. Retrieval Export functions

Style – Annotations – General

Settings		
▷ · General ▷ · Display	Annotations	
Hit list ▶ - Print settings Mail settings ■ - Style Layouts ▶ Annotations	Color definition of documents with annotations	

All tabs – Action group – Extras button – Settings menu item

In the general comments menu, you can define the frame color of the documents with a comment (*in our example*: blue).

	<u>@</u>) =			the lot	passes the la
	Search	Hit list	View	Information	
Show	Informatio	n Print	X Clear	 ▶ Save ▼ ▶ Send ▼ ▶ More ▼ 	C Forward Backwa
Preview	/			Edit	₽×
Creat On: 1	ed by: HABEL 0/17/2011 At:	system use 13:23:56	r		



II. Retrieval Export functions

Style – Annotations – Notes

▶ General ▶ Display	Note comments		
 Hit list Print settings Mail settings Style Layouts Annotations Note comments Text annotations 	 User name Display active note Font Background color Definition of preassigned text Created by: \$UsrVName\$ \$UsrN On: \$Date\$ At: \$Time\$ 	Global	

All tabs – Action group – Extras button – Settings menu item

If *Display active note* is not ticked, then only a pin is shown to indicate that there is a note attached to the document. To display the note itself you have to click on this pin. You can make settings for the note in the *Font* menu and *Background color* menu. The default setting is a yellow background and red font. The administrator can make additional settings for the *Definition of pre-assigned text* per *user* or *global*.



II. Retrieval Export functions

Style – Annotations – Text

General Display	Text annotations		
Hitlist -Print settings Mail settings	User name	 Global 	
Style Layouts Annotations	Definition of preassigned text		
Text annotations	Created by: \$UsrVName\$ \$UsrNN On: \$Date\$ At \$Time\$	ame\$	
	9		

All tabs – Action group – Extras button – Settings menu item

For text entries, this menu offers the options of defining the *font* and *pre-assigned text_per user* and *global* (settable by the administrator).



II. Retrieval Export functions

2. Adapt input mask

(only active within Search and Information)

Using the context menu it is possible to change the layout of the mask, that means you can fade in and out fields individually, because you (don't) need them for using.

Subject		Access to
Info		Archiving
Full text		Offer exis
		Order exi
	Adjust template-layout	Order-cor
		Delivery i
	Save template-layout as default	Invoice e
	Save template-layout with receipt type	Release 1
		Release 2
		File exten
		Dossier cu

If you choose Adjust template-layout, a box appears to adjust lines and/or categories..

Salesperson		Delivery da
Department		Message
Subject	Customize 📼	Access to
Info	Bows Categories	Archiving d
Full text	Caleguies	Offer exis
		Order e
		Order-contr
		Delivery n
		Invoice e
		Release
		Release 2
		File extensit
		Dossier curi



II. Retrieval Export functions

Salesperson		Delivery da
Department		Message II
Subject	Customize ×	Access to I
Info	Bows Categories	Archiving c
×		Offer exist
	Full text	Order exis
		Order-cont
	~~	Delivery no
		Invoice exi
		Release 1
		Release 2
		File extens
		Dossier cur

Now you can fade out a database field just by pulling it into the box.

Likewise, it can be pulled back into the mask. With the same method database fields can be moved from one place to another and this way individualize the mask for the user.

If the field *Project no.* is dropped here, it will be added as sub-item of the *Project description* (visible because of the two bars, which don't stand among each other.

Account description		
Project description		P
Del Projectino.	₩	Ŧ
Message ID		
		0
Project description		1
Project no.		P
Delivery date	₩	=
Message ID		

If the field *Project no.* is dropped here, it will be added as the next item after the *Project description* (visible because of the two bars, which stand among each other).

Account description		
Project description		\sim
Del Projectino.	=	=
Message ID		



II. Retrieval Export functions

Project description	4	ρ
Project no.		$\hat{\rho}$
Delivery date	=	=
Message ID		

This logic is also valid for the placing of fields out of the selection box.



The settings are user-dependent.

To save the changes, a respective command is provided in the context menu. If these changes are only valid for special document types you have to choose the document type in the database field before making changes in the mask. If you do not save the changes you will be prompted to save them before closing the program.

Adjust template-layout		
	Save template-layout as default	
	Save template-layout with receipt type	W



II. Retrieval Export functions

Export functions

General

File:

Overwrite if exists?

🔽 Start export program

<u>0</u>K

HABEL provides various export functions, to make data available from the archive for other applications and to allow retrieval of information for searches independently of accessing the archive.

If the Export program is started by an icon, you are offered a selection box. The following selection box contains all possible export functions and may differ from your own system if you are not using all export modules.

X

Abort



Selection

HPHAB200.EXP



II. Retrieval Export functions

HABEL-EXPORT Retrieval

The **HABEL EXPORT Retrieval** module allows you to transfer selected index data from the HABEL archive in standard ASCII format. This data can be used e.g. for evaluations.

First of all enter the required search criteria into the search mask, so that you only retrieve the data you also want to export.



If you do not enter any data the content of the entire database will be transferred for export!

Start the program by clicking the export icon in the Search tab.

🗸 ок

Export x Export formats Default Ascii format fixed sentence length Ascii format with header and TAB separation (such as Excel) DBC database format for local installation		As necessary choose another pat using the selection button, to sav the data, and start the expo	
		If the file already exists, it can be replaced by activating "Overwrite if exists?".	
Path:	C/V		
File:	HPHAB200.EXP		
© Overw ✓ Start o	rite if exists? export program S <u>e</u> lection <u>A</u> bort		
Export	:\messe\habel\XX001030	The search terms including item data are exported and made available in the file for further use.	

Written: 473


II. Retrieval Export functions

If, for example, the data are exported to an Excel table, the result might look as follows.

Export	х									
Export formats © Default Ascii format fixed sentence length										
◉ Ascii f ⊙ DBC d	ormat with header and TAB separation (such as Excel) atabase format for local installation									
Path:	C:\									
File:	HPHAB200.EXP									
🔲 Overwi	rite if exists? export program									
<u> </u>	Selection <u>A</u> bort									
Export										
File: c:\	messe\habel\XX001030									
Written:	473									

🗸 ок

Result:

0	📭 🖬 🤊 - 🝽 - 🛱 🖽 = HPHAB200.xls - Microsoft												
0	Start	t Einf	ügen	Seitenlayo	ut Fo	rmeln	Date	en (Überprüfe	n Ansi	icht Entw	icklertools	Add
	K25		• (f_{x}									
	А	В	С	D	E	F	G	Н	- I	J	K	L	
1	DateiNr	SeiteNr	WormNr	ScCoKz	FormNr	Firma	Filiale	BelArt	UBelArt	Barcode	BelDt	AngebNr	
2	115003	0	1	2		1		33			24.04.2008		
3	115004	0	1	2		1		15			28.04.2008		
4	115011	0	1	2		1		33			08.05.2008		-
5	115012	0	1	7		1		33			08.05.2008		
6	115013	0	- 1	- 2		- 1		- 33			09.05.2008		1
7	115014	0	1	7		1		33			09.05.2008		1
8	115015	0	1	2		1		19			29.05.2008		1
9	115016	0	1	2		1		5		800253	29.05.2008		_
10	115024	· _ 0	1	. 2	م بر	1	100	33	11 A.		29.05.2008		



II. Retrieval Export functions

Furthermore you have the possibility of transferring index and document files for offline research. This type of export is useful, for example, for field sales consultants, who might like access to archived dossiers when visiting clients. To use the document retrieval function offline (i.e. disconnected from the link to the in-house archive) it has to be installed on the Notebook.

First of all enter the required search criteria into the search mask, so that you only retrieve the data you also want to export. If you do not enter any data the content of the entire database will be transferred for export. Start the program by clicking the export icon in the *Search* tab.

If the file already exists it can be replaced by activating "Overwrite if exists?".

Export for									
Caport ron	nats								
🔿 Default Ascii format fixed sentence length									
Ascii format with header and TAB separation (such as Excel)									
) DBC da	OBC database format for local installation								
Path:	C:V								
File:	HPHAB200.EXP								
Overwrite if exists?									
Start export program									
		_							
<u>o</u> k	Selection Abort								

By activating the function "Start export program" (1), the local archive is compiled immediately after exporting the data and documents. If you first want to collect various exports and then transfer all of them into the local archive at the end of the process, leave the tick out until the last export.



II. Retrieval Export functions

Quelle.: C:\MESSE\HABEL\	
Ziel: C:\MESSE\LOKALDIR\	
Bestehendes Archiv überschreiben	
🔲 Belege nicht löschen?	
Programme/Dlls nicht übertragen?	
🔲 Update Verzeichnis kopieren	
🥅 Programm nach Übertragung schließen?	
WySQL-Programm kopieren?	
Operation :	
Status :	

Menu for compiling the local archive; it becomes active on starting the export program. The data to be exported are copied from the source and saved in the destination. If the existing archive is to be overwritten this function has to be ticked. You have the option of activating "Do not delete documents", so that documents that have already been exported are not overwritten. This makes the export process quicker. Likewise, you can opt out of transferring the current programs for the local archive (saves time) and the search and find process is then based on the existing status.



II. Retrieval Export functions

Using export profiles

With the **HABEL EXPORT** module, you can store profiles for the export that can then always be reused for the export process. This is sensible if the same data are often used for offline searches.

A separate program is available for storing the profiles and for subsequent export.

HABEL - Export Plus		
Exportprofil: Demo Profil 1		
Statusmeldungen:		
Choose an export		
profile, and start		
Exporting with		
	1 - 20 - 1 - 1	
Exportieren Testen Erstelle Setup	Abbrechen	Beenden
Edit the profile		
X Delete the profile		
New profile		



II. Retrieval Export functions

To edit a profile you get a separate window for carrying out the changes:

Profil bearbeiten: Demo Profil 1	
[SETTINGS] DisplayName=Demo Profil 1 ExportDir=c:\exports\demo1 SetupCfg=c:\PATH_TO_GEDOSOD\ini\hpexpa Users=all MediumCap=680	dv\setup1.cfg
[EXPORTS] hdhbl030 BelDt:???200? BelArt:0007	
4	
	Schließen

If you then start the export and the previous directory is not empty, you will be asked whether you want to empty the file prior to export.

Warnung	ļa -				×
	Das Ziel "c	:\exports\demo1	\" <mark>enthält scho</mark> r	n Daten. Ordner vor o	lem Export leeren?
		<u></u> a	<u>N</u> ein	Abbrechen	

Then test the export using the "test" button and check whether the required data are available. Then create a setup file for offline searching using the button "Create setup".

HABEL-EXPORT Disc

The module **HABEL EXPORT disc** allows you to export to a CD not just index and document data but also your searches, so that people who do not have HABEL installed can be provided with data from the archive. Possible application: forwarding data to tax consultants.



II. Recherche HABEL WEB

HABEL-WEB

<u>HABEL WEB</u> offers another option for external searching. This module gives you access to archive data via a web interface (for example the entire archive or parts of it, which can also be stored on external web servers). This is useful, for example, for field sales consultants who want access to their own data, business partners etc. The access data will be made available to you by your administrator. Note: The archive for web access is not kept at HABEL but on your premises or at another vendor.

HABEL [®] Dokumentenmanagement	
Benutzer: habel	Passwort:
[Kennwort ändern] [Neues Konto]	Login

webRecherch	e - Sischwanke			0 · 0	
Recherche Aligen	ein Ϋ	21	offeniste verdicisten	Suchen Le	ieron Logo
Firma: Belegart: Belegnummer: Belegdatum: Angebot Nr: Bestell Nr: Fremdbelegnumme Senice-Bencht Nr: Vertrags Nr: Auftrags Nr(intern): Reparatur Nr: Reparatur Nr: RMA Nr: Produktsparte: Hersteller KufLi-Nr: Name: KufLi-Kurzbescht.	HABEL GmbH		Artikelnummer: Artikelbezeichnung: Senennummer: Betrag Betraff: Info: Message ID Zugntf Postkorb: Erfassungsdatum:		

You reach the web search mask, the design of which varies somewhat from the usual mask.



II. Recherche HABEL WEB

After entering the required search terms and starting the search with the search button, the matching hits will be displayed.

<i>(</i> We	🖉 WebRecherche - Trefferliste - Windows Internet Explorer									
G	•	🙋 http://www.ha	ıbel-archiv.de/habelw	eb/EXEC/12/103C2201CAF4E8440C58E3 🔽 🐓 🗙	Live Search	P -				
Datei	Datei Bearbeiten Ansicht Favoriten Extras ?									
🔶 e	😭 🍁 🌈 WebRecherche - Trefferliste 🍡 👘 🔹 📴 🗸 👘 🔹									
Z	Zurück (Standardeinstellung) 👻 Einstellungen << >> Logout									
	Beleg	Belegnummer	Belegdatum	Ku/Li-Nr Name	Ort	An ^				
	02	100202	04.03.2002	26159 Interconnect AG	80668 München					
	05	25612	06.03.2002	26159 Interconnect AG	80668 München					
	09	01490	13.03.2002	26159 Interconnect AG	80668 München					
	02	100206	23.05.2003	26160 informatica ag	50937 Köln					
	0.5	225615	27.05.2003	26160 informatica ag	50937 Köln	(a)				
	09	401495	05.06.2003	26160 informatica ag	50937 Köln					
	12	500020	28.06.2003	70528 Bergmann Software Ring	78056 Villingen-Schwenningen					
	14	600205	02.07.2003	70528 Bergmann Software Ring	78056 Villingen-Schwenningen	C 1 C				
	12	500018	29.06.2003	70527 DIGI-IT	70607 Stuttgart					
	14	600203	03.06.2003	70527 DIGI-IT	70607 Stuttgart					
	13	9574	01.07.2003	70527 DIGI-IT	70607 Stuttgart					
	15	9579	08.07.2003	70527 DIGI-IT	70607 Stuttgart					
	17	9586	14.07.2003	70527 DIGI-IT	70607 Stuttgart	334				
	17	9591	18.07.2003	70527 DIGI-IT	70607 Stuttgart	334				
	19	9590	22,07.2003	70527 DIGI-IT	70607 Stuttgart	334				
	13	9504	01.07.2003	70528 Bergmann Software Ring	78056 Villingen-Schwenningen					
	15	9516	03.07.2003	70528 Bergmann Software Ring	78056 Villingen-Schwenningen					
	17	9528	07.07.2003	70528 Bergmann Software Ring	78056 Villingen-Schwenningen					
	17	9524	09.07.2003	70528Bergmann Software Ring	78056 Villingen-Schwenningen	8				
	19	9539	11.07.2003	70528 Bergmann Software Ring	78056 Villingen-Schwenningen					
	01	9543	22.05.2003	26160 informatica ag	50937 Köln um en ten managem	ent				
	04	9546	26.05.2003	26160 informatica ag	50937 Köln	100				
	07	300503	29.05.2003	20160 informatica ag	50937 Köln					
	07	300504	29.05.2003	261 0 informatica ag	50937 Köln					
	01	9554	03.03.2002	26159 Interconnect AG	80668 München					
	04	9559	05.03.2002	26159 Interconnect AG	80668 München	100 🛩				
<						>				
				😜 Interne	t 🔍 100%	6:				

By clicking on the document display icon the relevant document is made available by download. A document preview is not possible.



Generally the web search offers only limited editing and adjusting options.



II. Recherche Function keys

Overview function keys and/or shortcut keys

Program	Function	
All	Print	CTRL + P
All	Back	ESC
Retrieval	Master data access	CTRL + L
Retrieval	Start the search	F3
Retrieval	Open new search	CTRL + N
Retrieval	Settings under EXTRAS	CTRL + Shift + S
Retrieval	Search direction (forward, backward)	ALT + arrow keys
Retrieval	Open information	F7
Retrieval	Change (all)	F12
Retrieval	Clear search fields	F6
Retrieval	End search	Alt + F4
Retrieval	Help	F1
Retrieval	Document display/full screen	F11
Retrieval	Overview of active users	CTRL + U
Retrieval	Send email	STRG + M
Retrieval	Lighter/darker	STRG + H /D
Retrieval	Reduce / increase	STRG + +/-
Retrieval	Fit width (hit list)	CTRL + Shift + 4
Document display	Rotate document clockwise	CTRL + R

"Stop improving and you cease to be good!"

Send your improvement proposals and ideas to handbuch@habel.de. Thank you.