

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
<u>HABEL ANNOTATIONS</u>	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.
	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

All rights reserved. No part of this manual may be reproduced or electronically processed, copied or disseminated in any way (by printing, photocopying, microfilming or other process) without the prior written authorization of HABEL. The contents of the manual are subject to revision without notice on the part of HABEL.

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.

HABEL GmbH & Co. KG
Untere Hauptstraße 1
D-78604 Rietheim-Weilheim
Fon: +49 (0) 74 61 / 93 53 – 0
Fax: +49 (0) 74 61 / 93 53 – 99
www.habel.de

HABEL Dokumentenmanagement GmbH
Niederlassung Schweiz
Rheinstrasse 36
CH-8212 Neuhausen am Rheinfl
Fon: +41 (0) 52 / 6 74 81 – 51
Fax: +41 (0) 52 / 6 74 81 – 50
www.habel.ch

Copyright © 2008 – 2011 by HABEL / as at September 1st 2011 / Version 5

Table of contents

General	3
Menu/tool bar or multi-function bar (ribbon).....	3
Using shortcut keys.....	5
Search mask.....	6
Docking of windows.....	8
Search	11
1. Input fields.....	11
2. Index search and full text search.....	16
3. Special mode: Detail search.....	26
4. Special mode: HABEL-SYNONYM.....	28
5. Special mode: Search using the hotkey.....	30
6. Special mode: Search over file directory tree.....	33
7. HABEL CONNECTION and HABEL CONNECTION plus.....	35
Hit list	36
1. Hit list settings.....	38
2. Using the contents of database fields.....	51
3. Document preview.....	54
4. Add another document.....	56
5. Combining operations.....	57
Document display	60
1. Settings.....	61
2. Options for editing archived documents.....	65
3. Affix annotations.....	67
4. Logs and history.....	75
5. Printing of text lines.....	77
6. HABEL-ACCOUNT ASSIGNMENT STAMP.....	77
Document information	78
Options / settings	82
1. Settings.....	83
2. Adapt input mask.....	103
Export functions	106
General.....	106
HABEL-EXPORT Retrieval.....	107
Using export profiles.....	111
HABEL-EXPORT Disc.....	112
HABEL-WEB	113
Overview function keys and/or shortcut keys	115

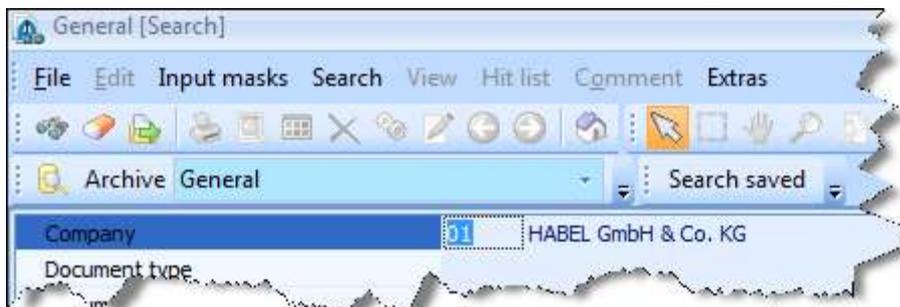
General

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.

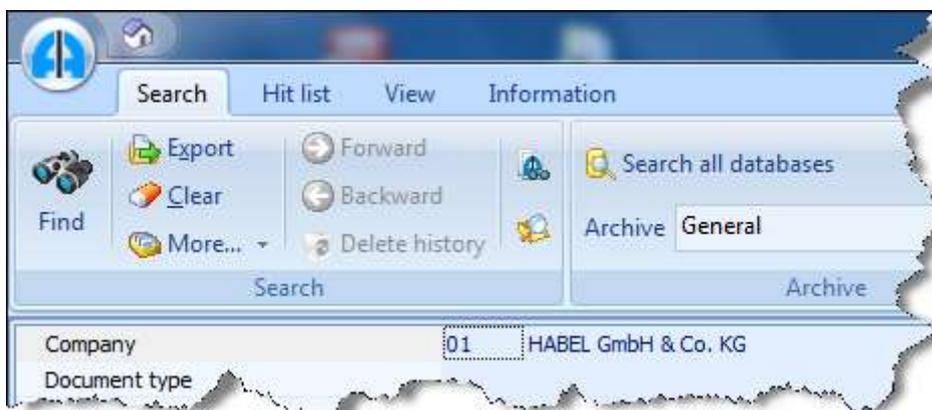
The documents in the hit list can be displayed, printed, edited or emailed, to name just a few of the options available. This also depends on your system configuration and access rights.

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

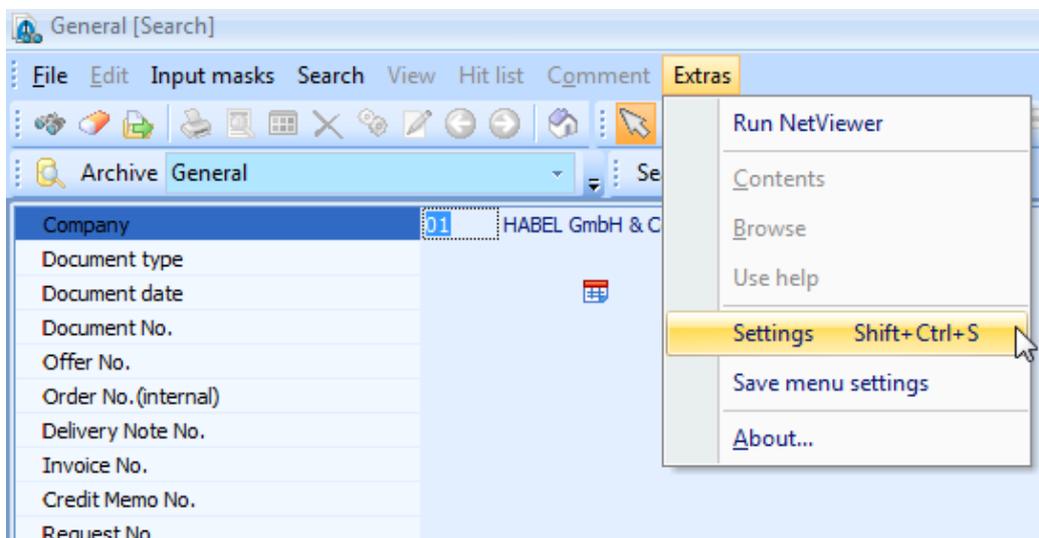


Multi-function bar (ribbon)

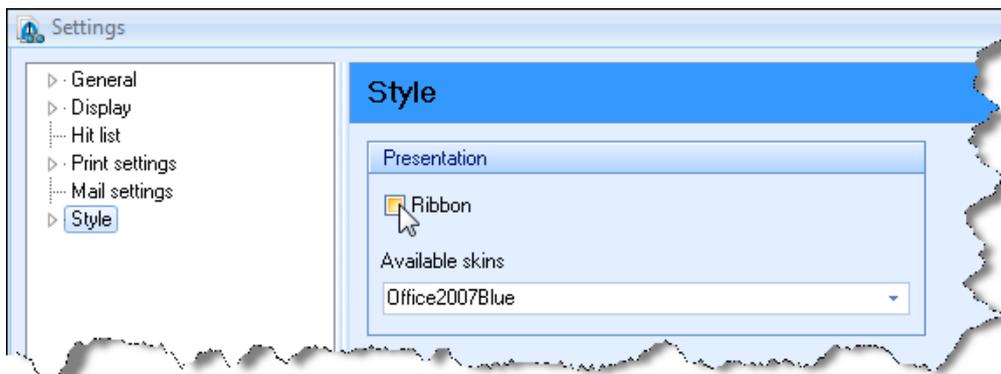
For displaying the functions within this manual, the multi-function bar (ribbon) is used by default.

	<p>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.</p>
---	---

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.



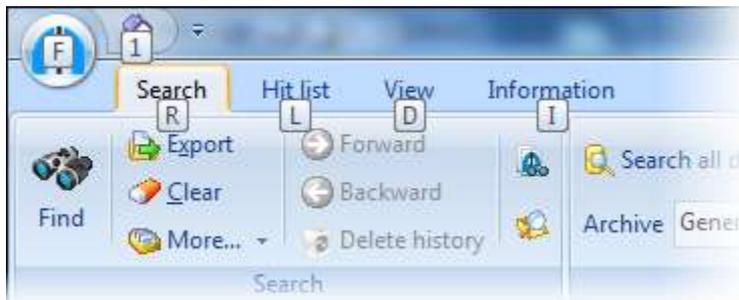
Click on the multifunction bar (ribbon) and close the search. The next time you start the search, the multifunction bar (ribbon) version will be displayed.

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

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.



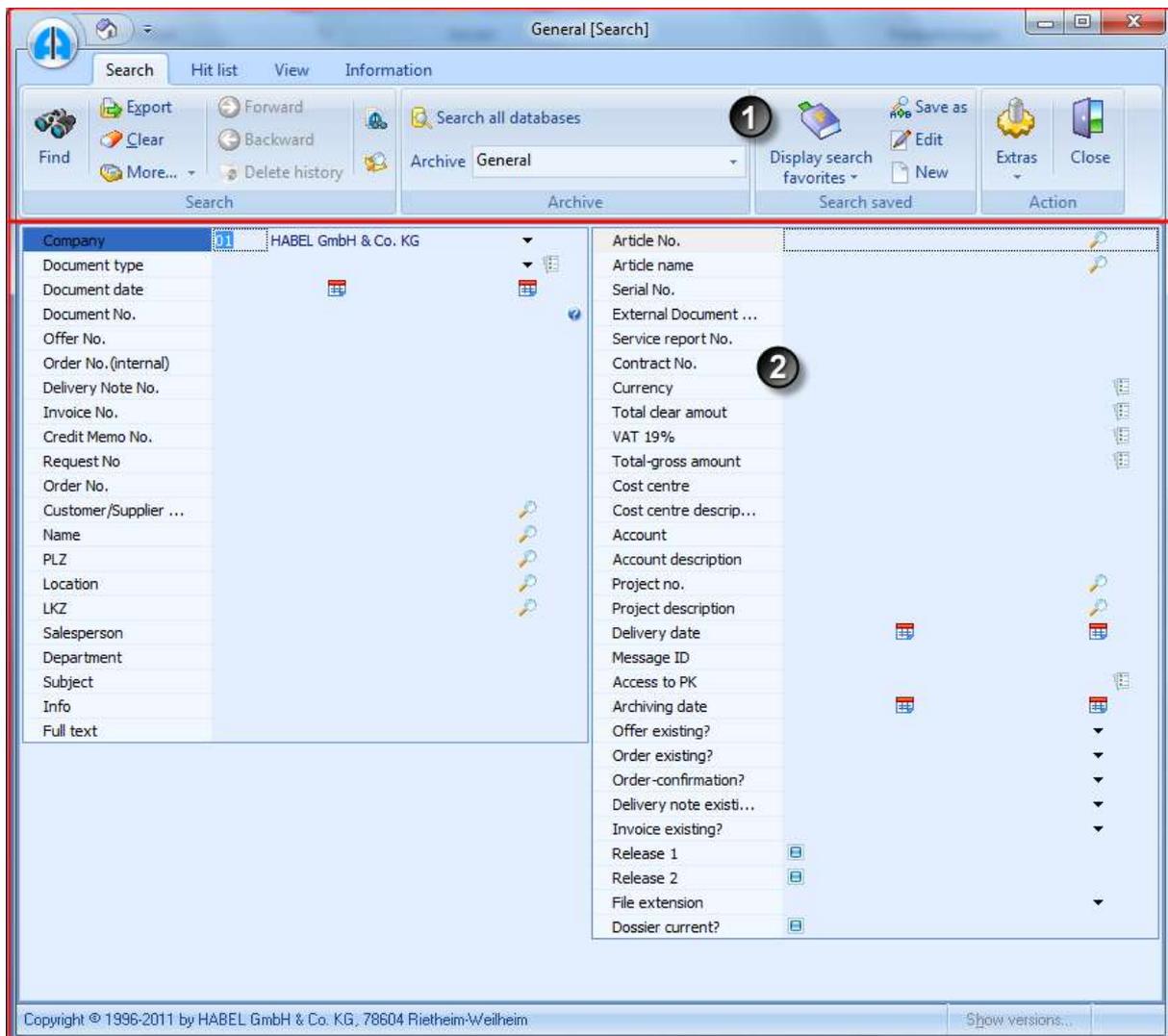
Some functions also have shortcut keys CTRL + key or function key (F1, F2 etc.) and can be accessed in this way. Over the shortcut editor within the settings, you can define own shortcut keys. Details about this will be handled in chapter Options/Settings.

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



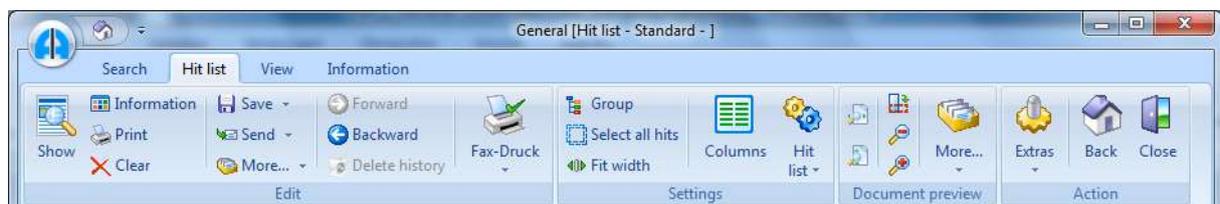
The multifunction bar consists of tabs, groups and buttons. The respective tab contains the most important functions subdivided into groups in which the respective commands are available as buttons. Depending on the time, the appropriate tab is in the foreground (active):

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



Hit list tab



View tab

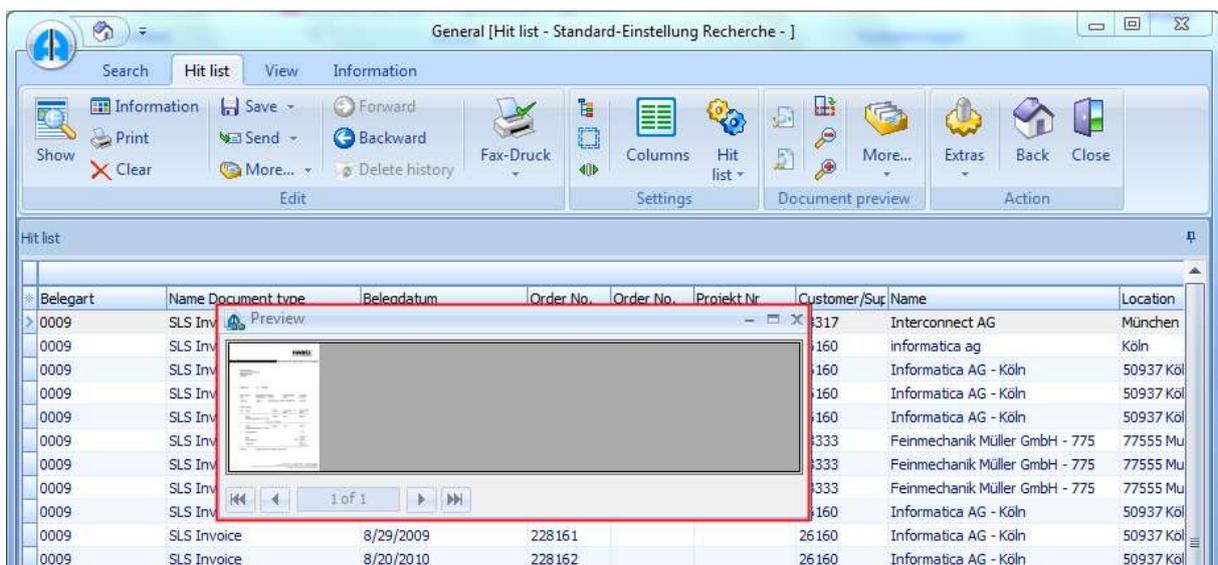
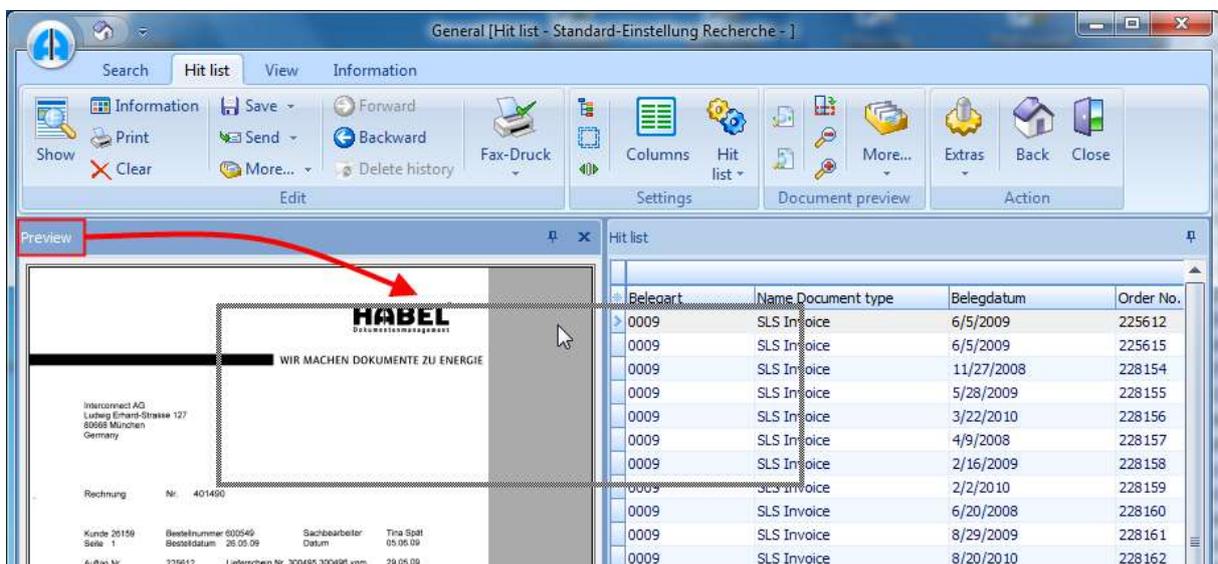


Information tab

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.

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.

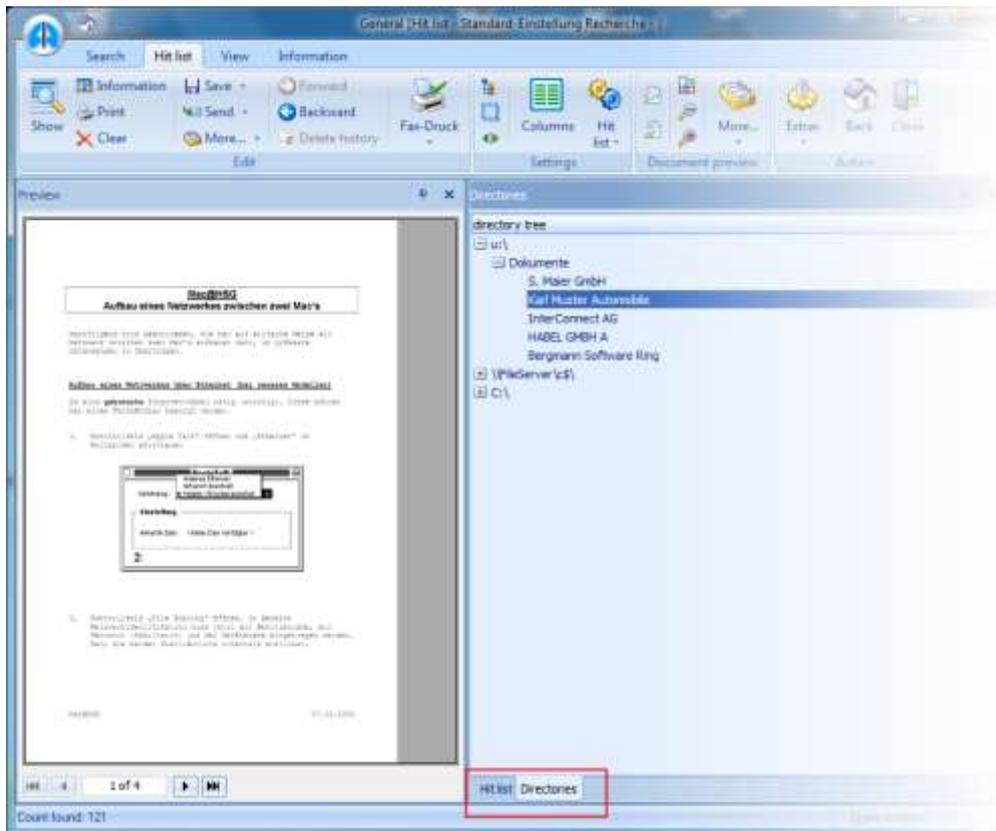
0009	SLS Invoice	5/26/2009
0009	SLS Invoice	3/19/2010
0009	SLS Invoice	10/22/2008
0009	SLS Invoice	4/15/2009
0009	SLS Invoice	8/9/2010
0009	SLS Invoice	4/15/2008
0009	SLS Invoice	2/3/2009
0009	SLS Invoice	2/19/2010
0009	SLS Invoice	12/10/2008

Register mark

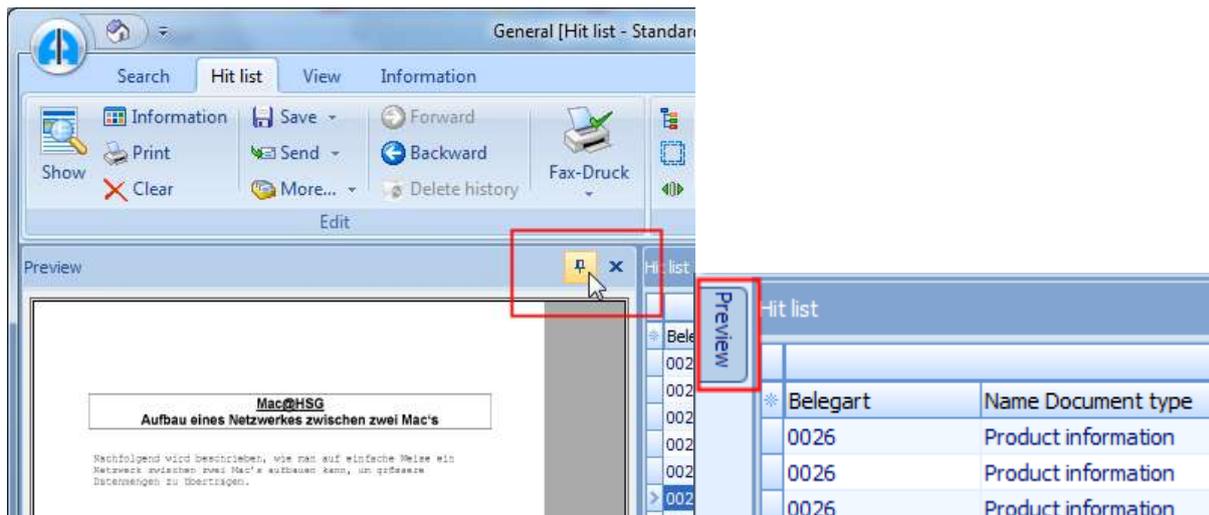


Register view

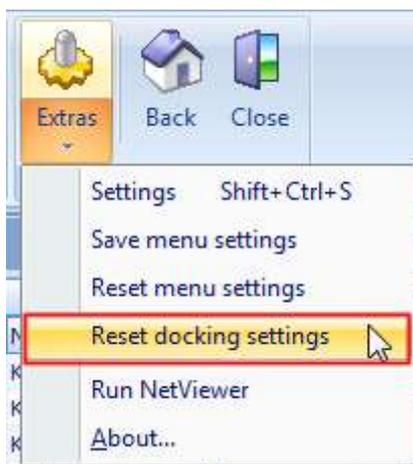
The register view is for example interesting in connection with the file directory tree. This way the preview is displayed on one side and the hit list parallel to the file directory tree as registers.



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.



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
Document date		
Document No.		
Offer No.		
Order No. (internal)		
Delivery Note No.		
Invoice No.		

Company	01	HABEL GmbH & Co. KG
Document type	0001	Enquiry
Document date		

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  Document date 

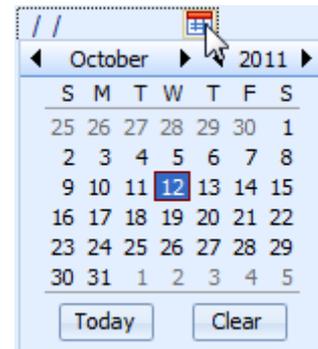


For date fields it is also possible – if configured – to search over a certain period of time. If you only enter a date in the first field, the system searches for this date, if you enter a from-till date it searches over this period. Remember: You cannot use the wildcard ? here.

Document date  

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

- . (dot) Today's data
- +1, +2, +3 etc. Today's date +1 day, +2 days, +3 days etc.
- 1, -2, -3 etc. Today's date -1 day, -2 days, -3 days etc.
- 1+, 2+, 3+ etc. 1st, 2nd, 3rd, etc. day of the current month/year
- 01, 02, 03 etc. 1st, 2nd, 3rd, etc. day of the current month/year (only for from-to fields)



You can also write beyond the point separation of the field (in this example: +10)

Document date 

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.	



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.).

Name

MÜLLER*

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.



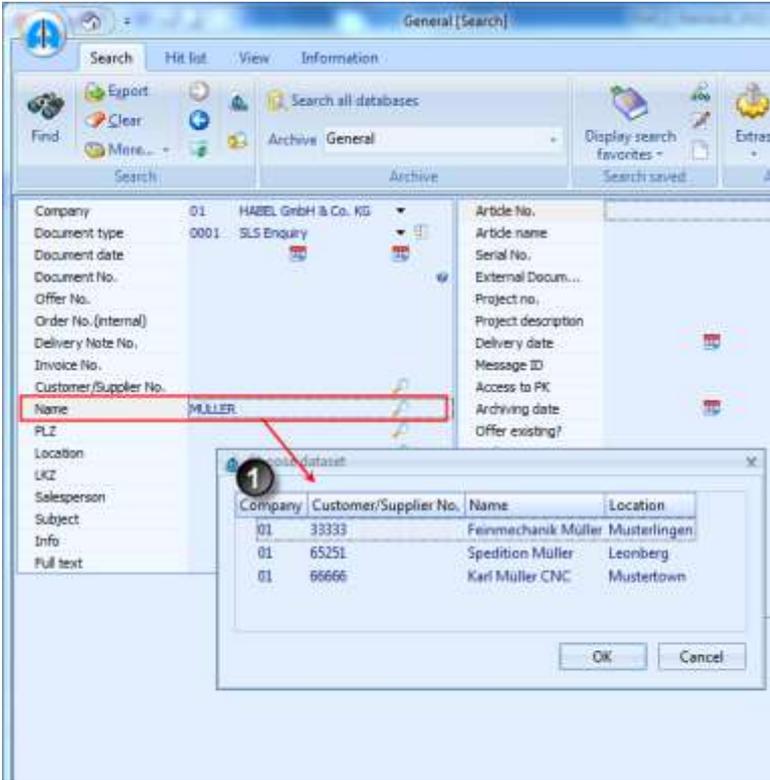
The search with placeholders is more complex than the precise search. For this reason it takes a little bit longer. To search empty fields, enter ? in the field. To search fields, which are not empty, enter the placeholder * (the empty fields will then not be displayed).

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.	
Name	

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)**.

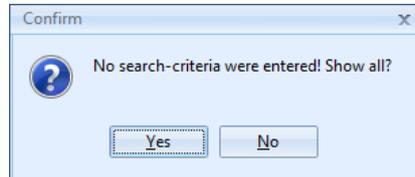


The screenshot shows the 'General [Search]' window with a search result for 'MULLER' highlighted in red. A dialog box titled 'Master Data' is open, showing a table of master data entries. A red circle with the number '1' points to the first entry in the table.

Company	Customer/Supplier No.	Name	Location
01	33333	Feinmechanik Müller	Musterlingen
01	65251	Spedition Müller	Leonberg
01	66666	Karl Müller CNC	Mustertown

On accepting the data, the terms are added to the search field as specified by the master **(2)**.

If you do not enter a term and click on the symbol or **CTRL + L**, all data stored in the master file will be displayed.



A 'Confirm' dialog box with a question mark icon and the text 'No search-criteria were entered! Show all?'. It has 'Yes' and 'No' buttons.

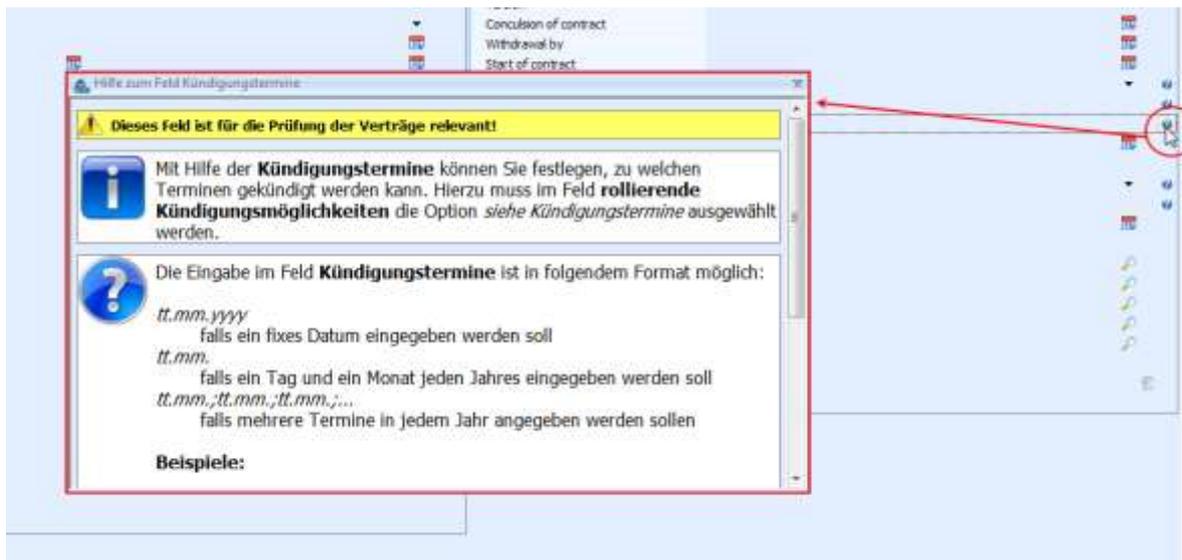
Fields with checkboxes

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	<input checked="" type="checkbox"/>
Release 2	<input type="checkbox"/>

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).



2. Index search and full text search

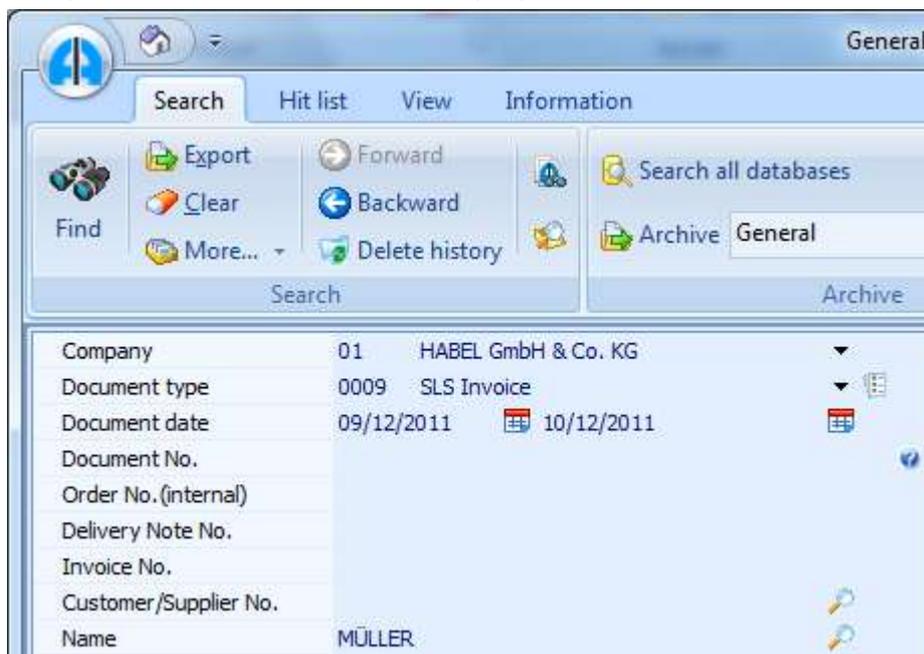
So-called Boolean fields (yes or no selection) can be represented by means of checkboxes. If the checkbox is ticked, the search is based on the answer for this field being yes; if the checkbox is not ticked and the background is white, the answer is no. A gray, un-ticked checkbox is ignored in the search.

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).

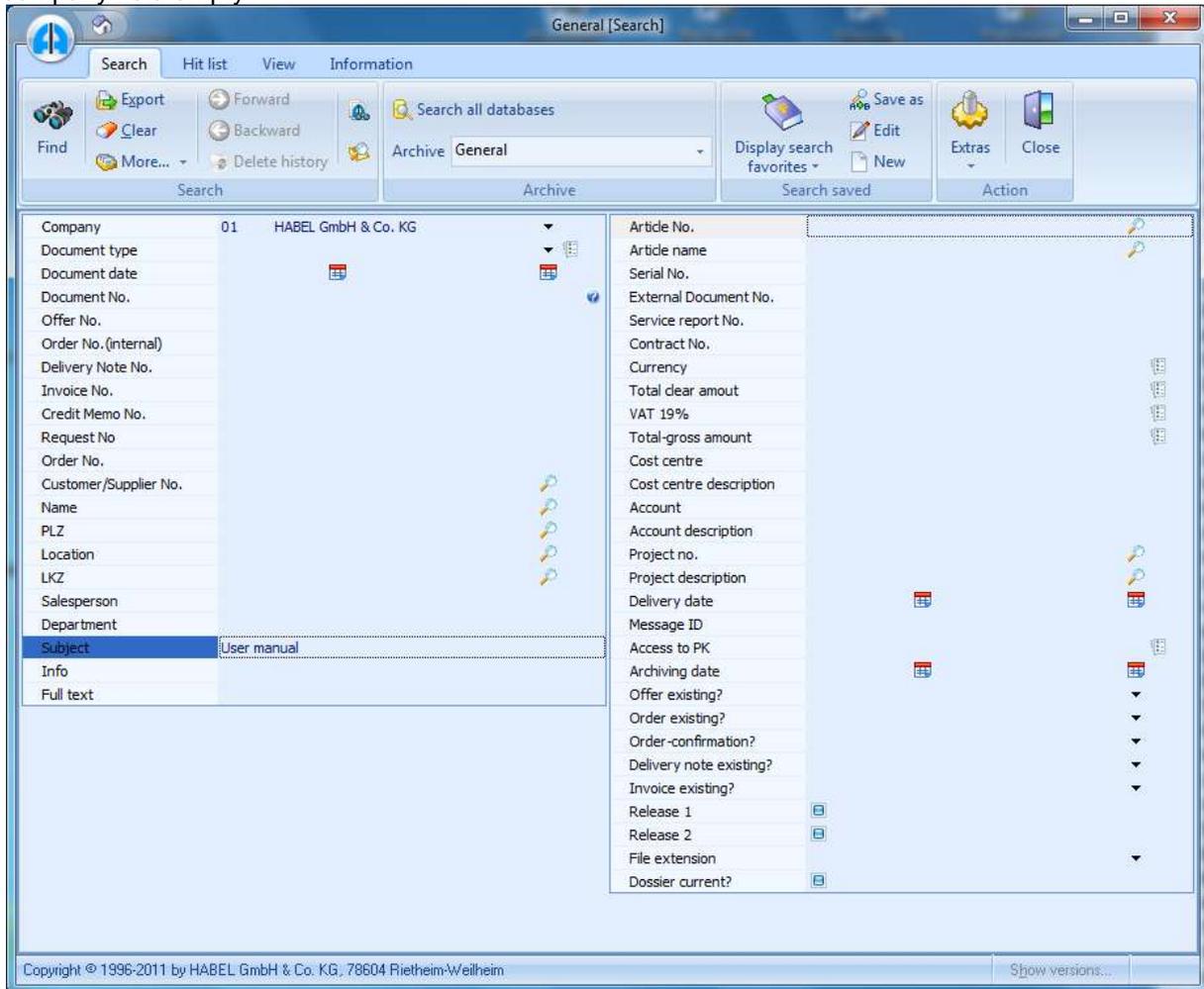
Example 1:

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.



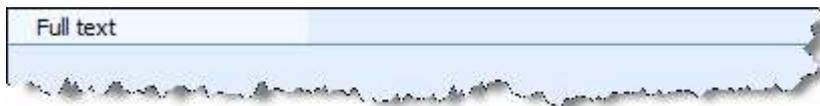
In our example, a restriction exists for the company 01.

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.



Full text search

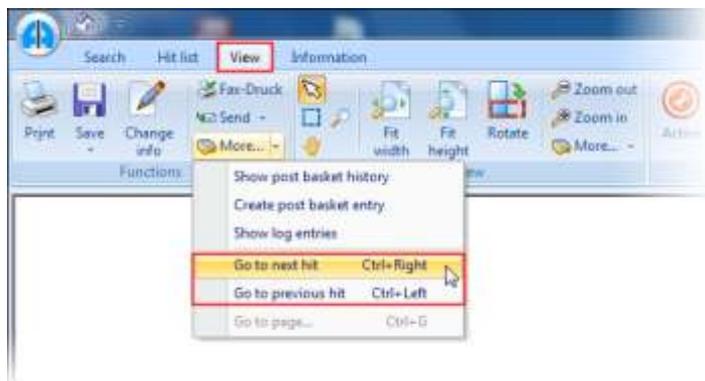
For a full text search, you need the additional module HABEL FULL TEXT and the related text recognition license. Full text search is generally installed only for selected document types such as manuals, minutes of meetings, correspondence etc. and can be identified by the additional "Full text" input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



Enter the term you are looking 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.



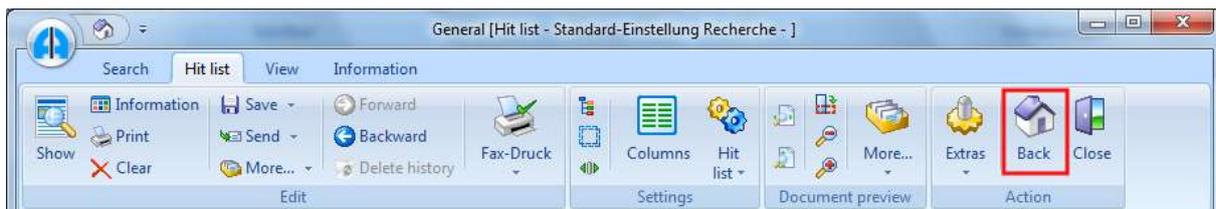
As well as full text search or index search only you can also combine them. This is done by entering search terms in the same way as for the index search and entering an additional term into the "Full text" or "Content" field, via which the full text is searched (limited to documents which could be relevant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

Finding

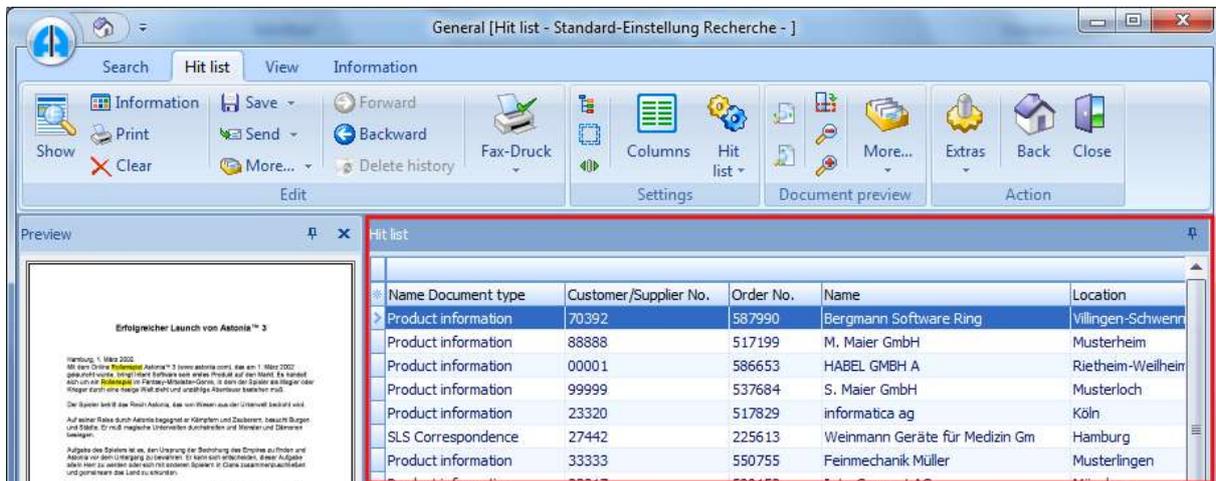
After entering the search criteria, starts the search by pressing the *Find* button or the *F3* function key, and the hits are displayed. The *hit list* tab becomes active. You will obtain the so-called "hit list" as your result. This shows you all documents containing all input search terms in combination.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



Search tab – Find



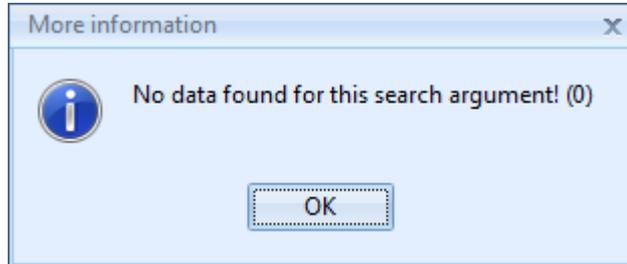
Hit list tab – Back button



Hit list

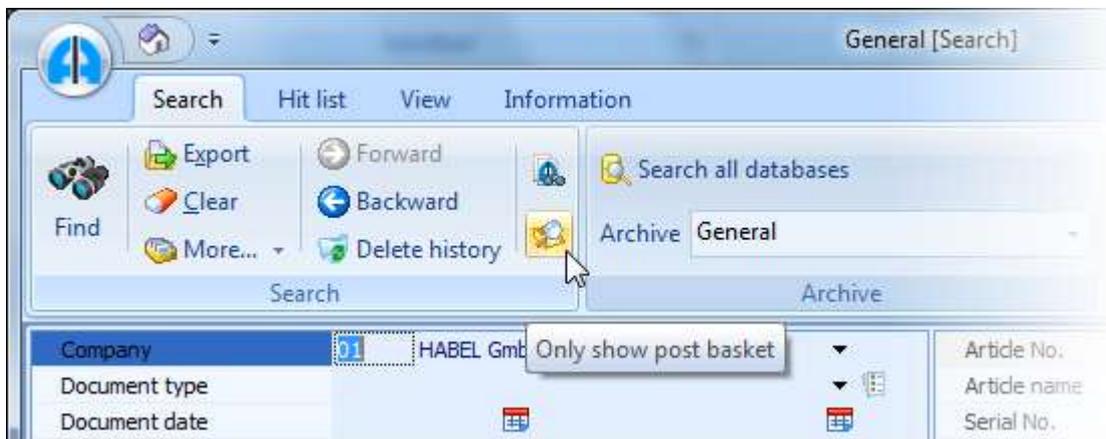
If no documents contain the entered terms, no hits are shown.

	<p>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.</p>
---	--



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.



Search tab – Only display post basket entries button

Name	Document type	Order No	Order No	Customer/Supplier Name	Name
SLS Offer		225615		26160	inform
SLS Order confirmation		225615		26160	inform
SLS Invoice		225615		26160	inform
SLS Enquiry		225615		26160	inform

A red box highlights the 'SLS Order confirmation' row. A tooltip above the 'Schmitt, Mike' cell in the 'Customer/Supplier Name' column indicates the post basket owner.

Hit list tab

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*.



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.



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.



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.



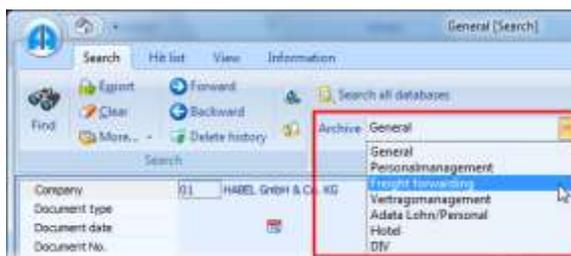
However, you can configure it so that the history is still available after closing the search. This setting option can be found in the group *Extras – Settings – General*. If the function *Save history upon closing* is not activated, the history is deleted when you end the search. Up to 10 searches can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



Search tab – Extras – Settings – General

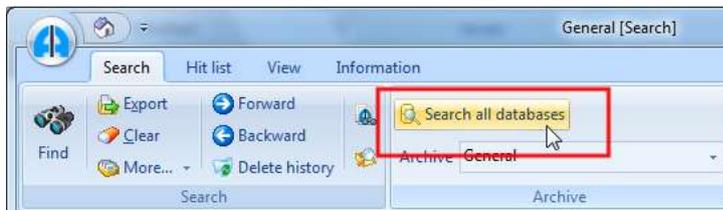
Select several databases – search all databases

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.



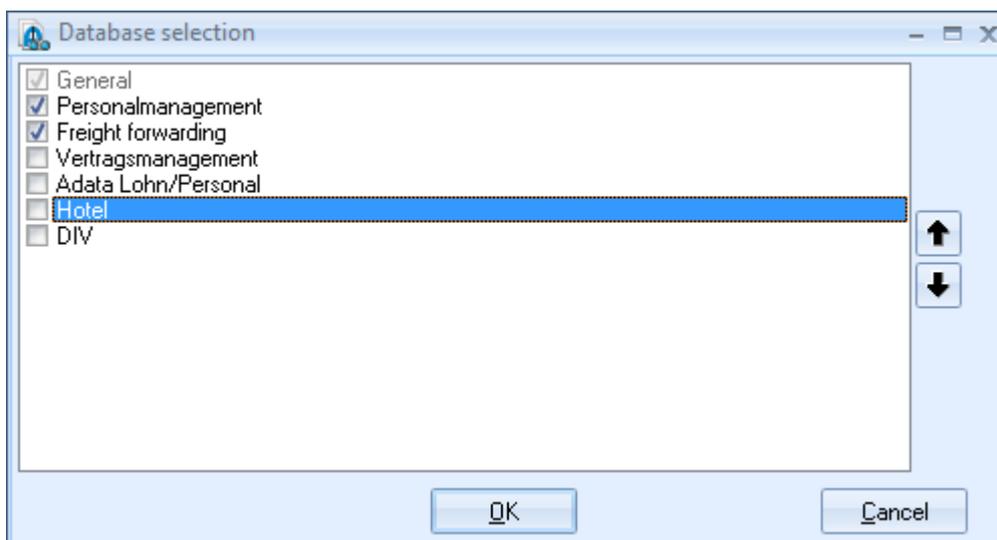
Search tab – Select archive

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



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.



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.

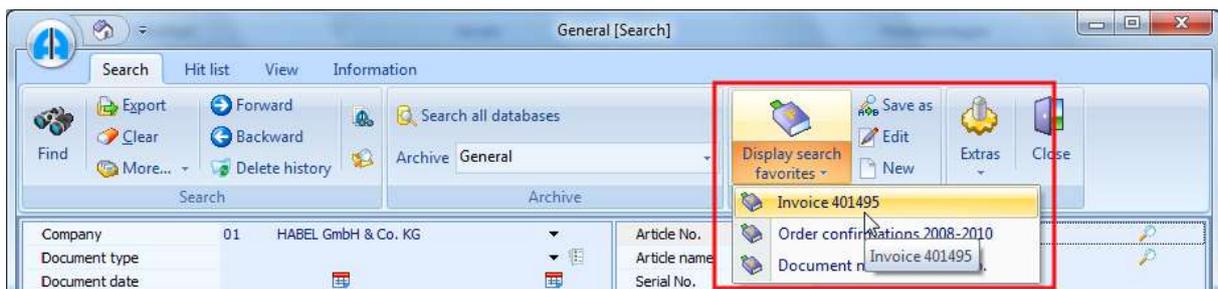
Search favorites

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.



Search tab – Search favorites group – New button

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".



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).



Quit

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

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



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.

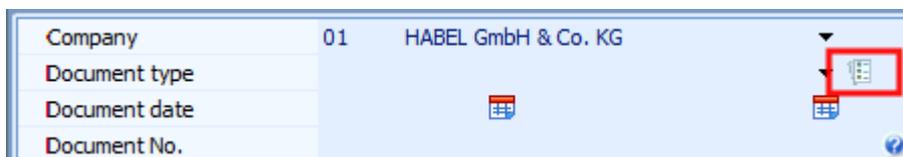


All tabs – Action group – Extras button – Settings menu item

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.



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 to12
- 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

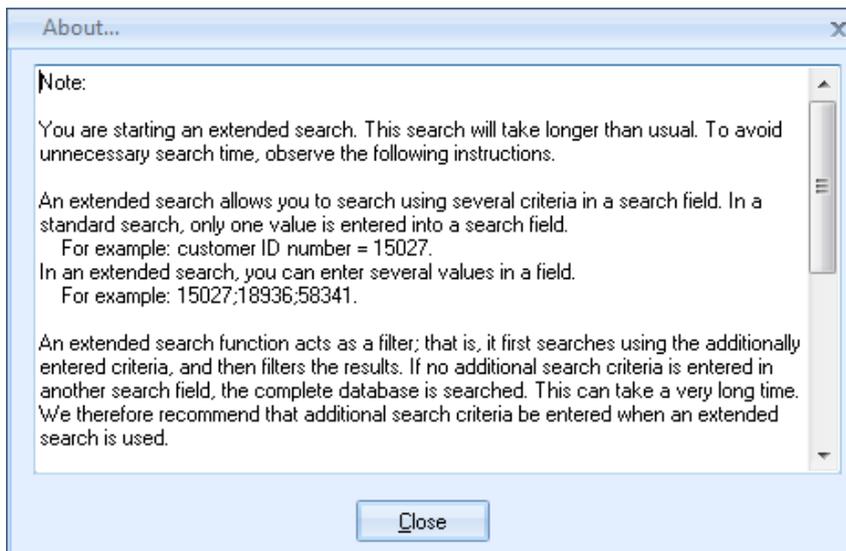
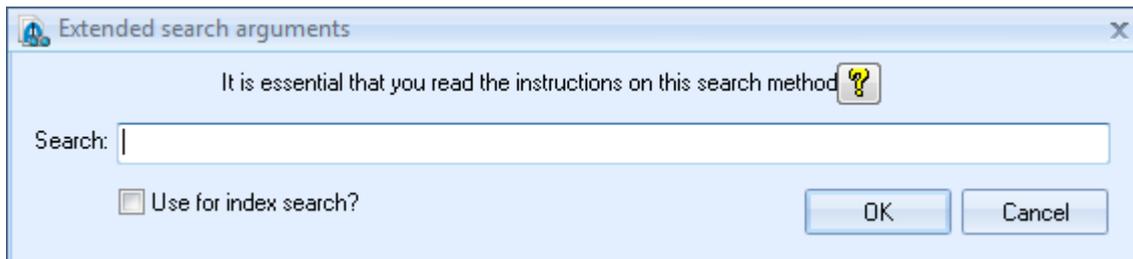
or

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.  Make sure that you observe these instructions!



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.



4. Special mode: HABEL-SYNONYM

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



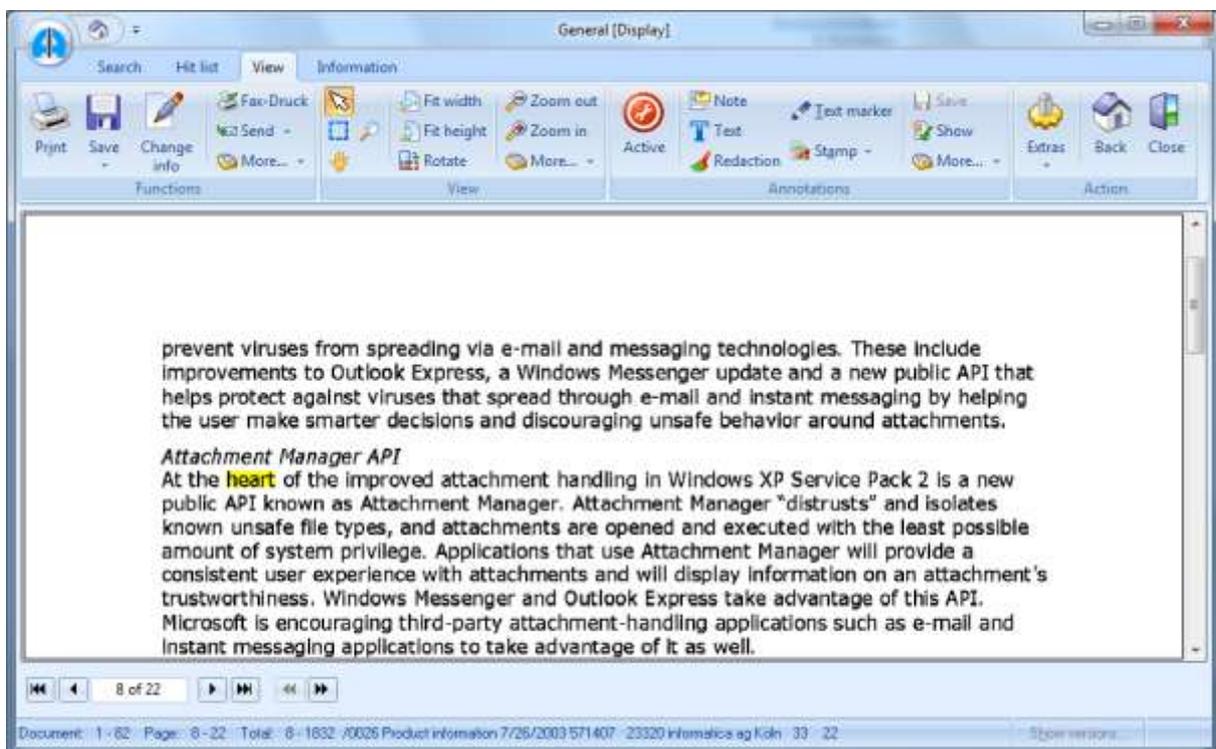
You must provide HABEL with a table showing which terms are regarded as synonymous. For example, you could also store a foreign language equivalent of the term.

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 **HABEL FULL TEXT** or for the term assigned in the table (in this example: heart and the German word Herz).



The displayed result is highlighted in the document.



Document display

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

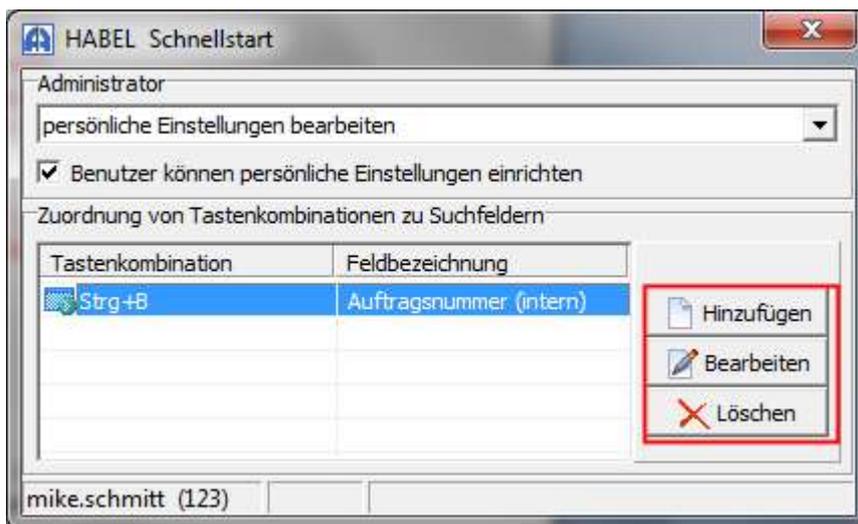
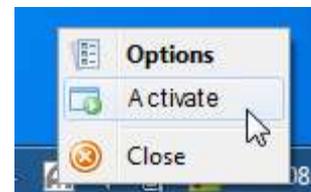
5. Special mode: Search using the hotkey

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 and enables the use of the hotkey function.



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).



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



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.



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.

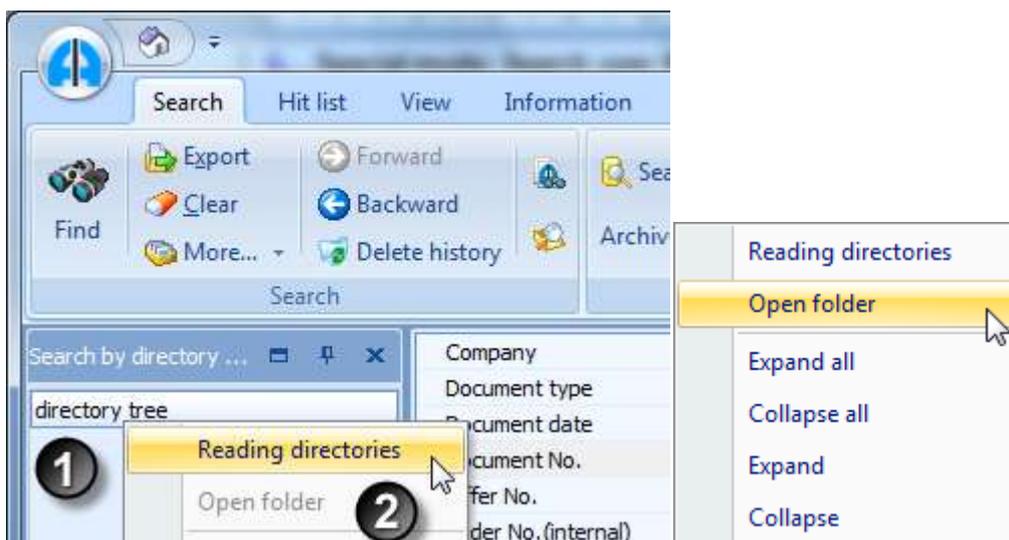


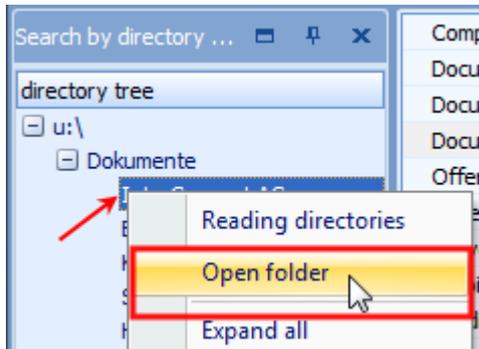
Some hotkeys are already occupied by Windows, e.g. CTRL + C for copy.

6. Special mode: Search over file directory tree

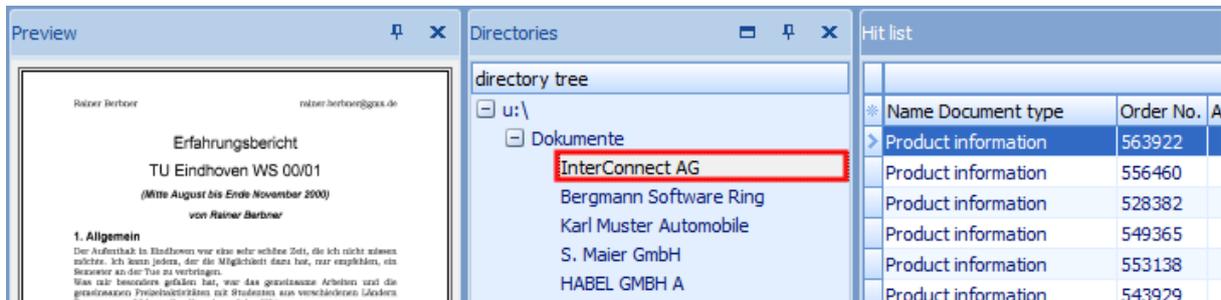
In connection with the use of the module HABEL-EXPLORER Import it is possible to search or display the documents over an explorer structure in the Retrieval. If the search over file directory tree is activated, within the *tab search – search group – button more* the command directory tree appears.

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.



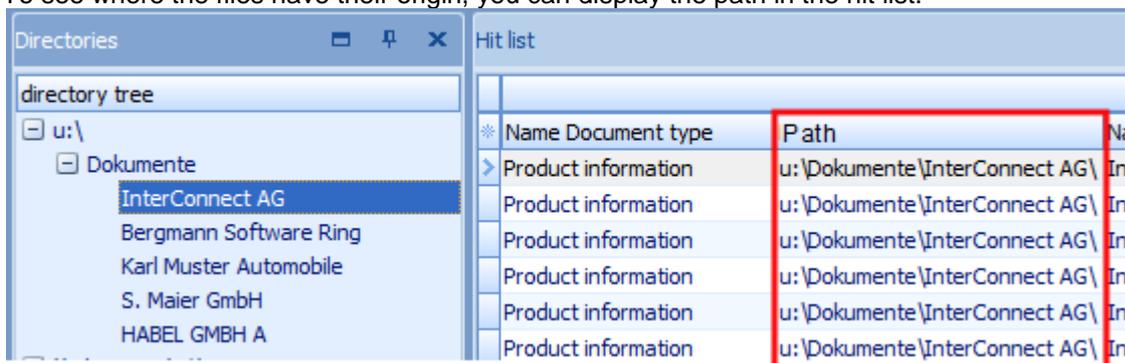


For the search you have to decide in which directory you want to search and then mark it and load it over the command *Open folder*. Afterwards the hit list will be displayed with all the results which lie under this file level. The requested result can now be chosen.



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 origin, you can display the path in the hit list.



7. HABEL CONNECTION and HABEL CONNECTION plus

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

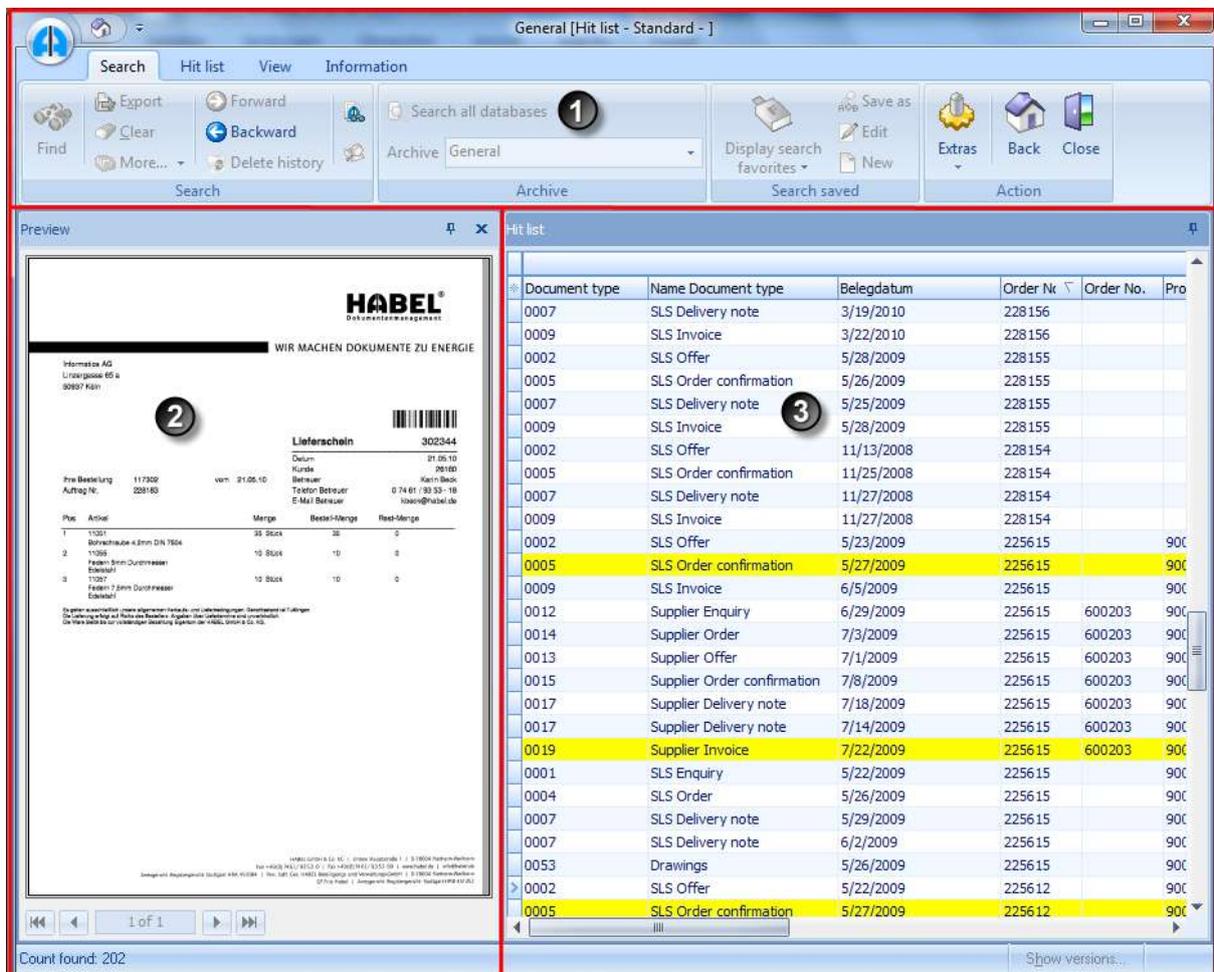
In this case the results are displayed by the external application and HABEL RETRIEVAL itself is not opened. Either the first hit matching the search criteria is made available as a document or alternatively a hit list is provided as an xml file from which you can select the document to be displayed.

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



The screenshot shows the HABEL software interface with a hit list and a document preview. The interface is divided into three main sections:

- Search Bar (1):** Located at the top, it includes a search input field, a search button, and various options like 'Export', 'Forward', 'Backward', 'Delete history', 'Archive', 'General', 'Search all databases', 'Save as', 'Edit', 'New', 'Display search favorites', 'Extras', 'Back', and 'Close'.
- Document Preview (2):** On the left, it displays a document titled 'HABEL' with a barcode and a table of items. The table has columns for 'Pos.', 'Artikel', 'Menge', 'Bestell-Menge', and 'Rest-Menge'. The document also includes contact information for Informatica AG and a 'Lieferschein' (Delivery Note) section.
- Hit List (3):** On the right, it displays a table of search results. The table has columns for 'Document type', 'Name Document type', 'Belegdatum', 'Order Nr.', 'Order No.', and 'Pro'. The table contains 202 entries, with several rows highlighted in yellow.

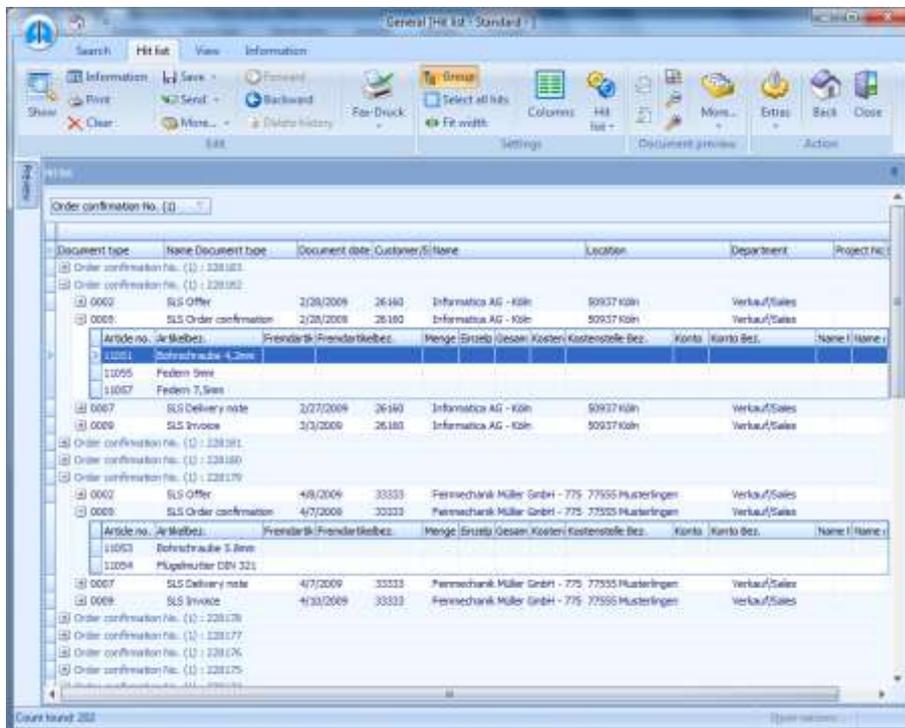
At the bottom of the interface, there is a 'Count found: 202' label and a 'Show versions...' button.

Hit list tab

The hit list has the following layout:

* Name Document type	Customer/Supplier No.	Name	Location	Order No.	Article No.	Article name
> SLS Offer	23317	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						
Supplier Delivery note						
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).



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.

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.



Hit list tab – Settings group – Fit width button

Name Belegart	Belegdatum
VK Angebot	22.05.2009
VK Auftragsbes	27.05.2009

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).



Hit list tab – Settings group – Group button

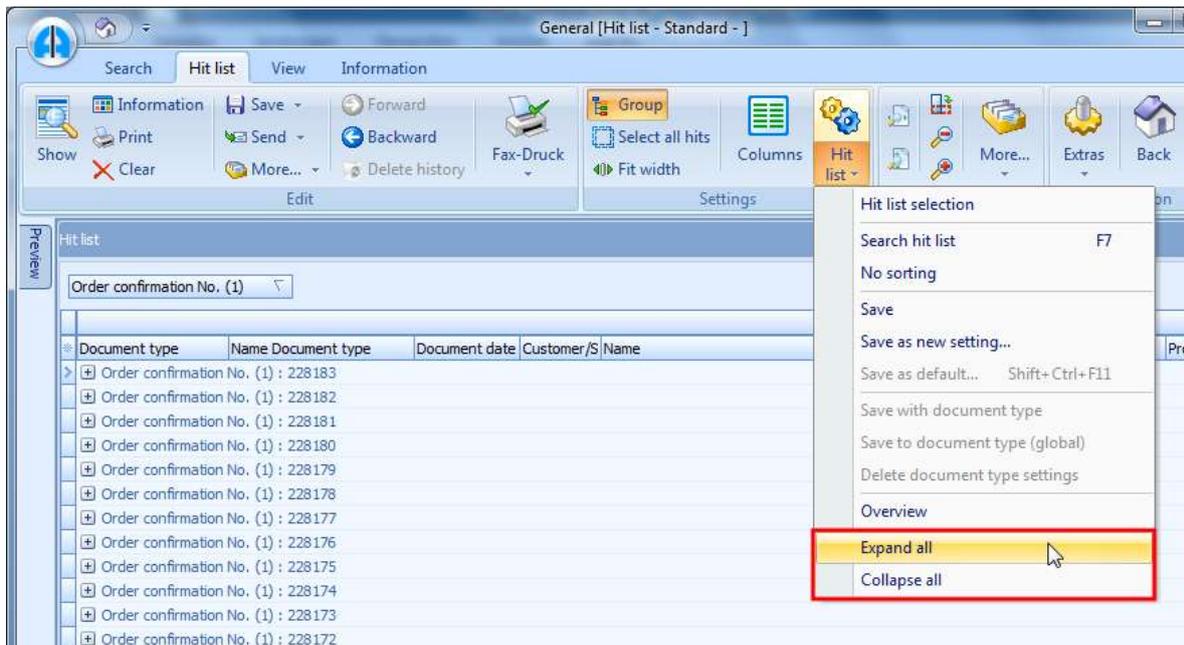
Press the *Group* button for the grouping function. A new bar appears into which you drag the column to be grouped.

Order No.	Name Document type	Customer/Supplier No.
228183	SLS Offer	26160
228183	SLS Order confirmation	26160
228183	SLS Delivery note	26160
228183	SLS Invoice	26160

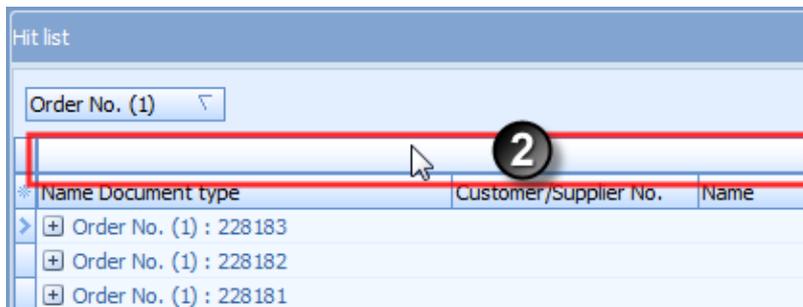
Result:

Order No. (1)	Name Document type	Customer/Supplier No.
Order No. (1) : 228183	SLS Offer	26160
	SLS Order confirmation	26160
	SLS Delivery note	26160

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.



Hit list tab – Settings group – Hit list button



Select all hits

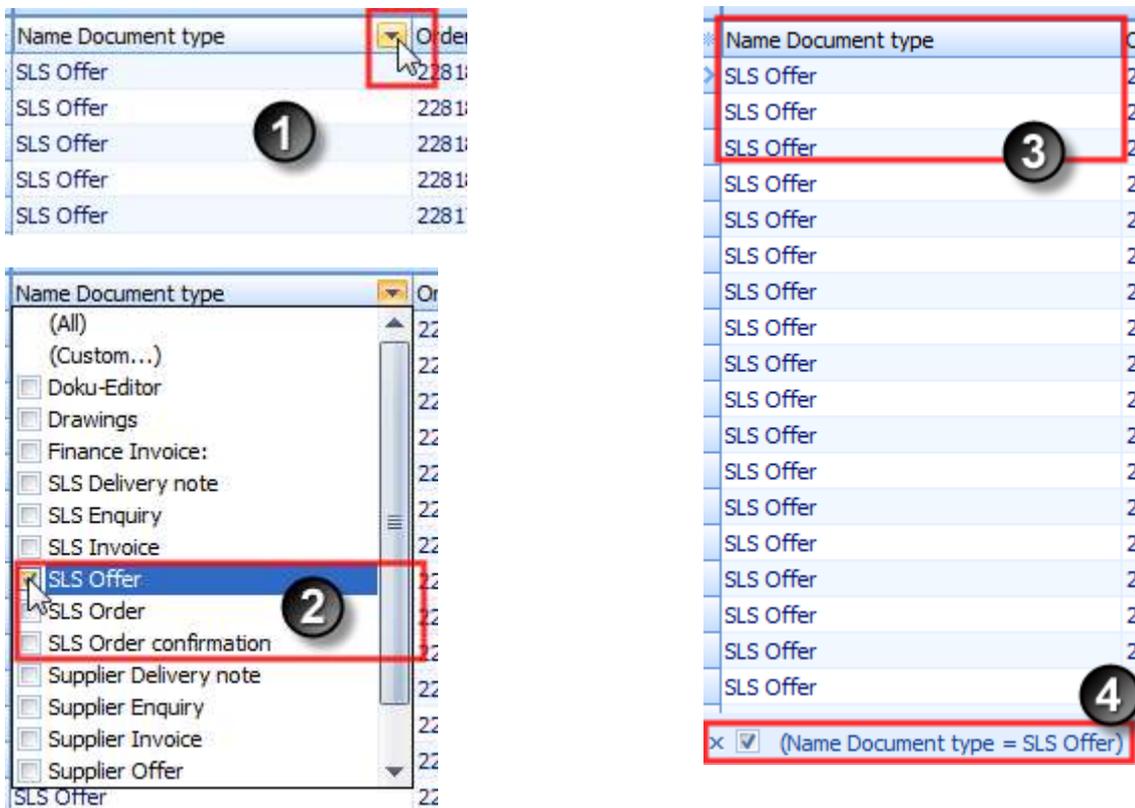
To mark all the hits in the hit list, in order to initiate further functions, the button in the menu can be used. In addition you can also use the shortcut CTRL + A.



Hit list tab – Settings group – Select all hits button

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.



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

Sorting

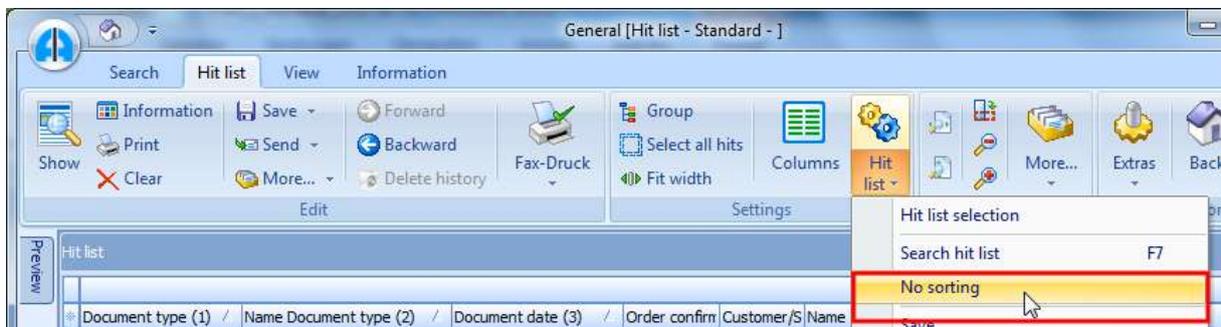
You can sort in ascending and descending order by simply clicking on the respective column. The **arrow** shows the sorting direction.

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.

The screenshot shows a table with the following columns: Name Document type, Order No., and Offer No. Red arrows point to the sorting arrows in the header row. Callout '1' points to the first arrow, and callout '2' points to the second arrow.

Name Document type (1)	Order No. (2)	Offer No. (3)
> SLS Invoice	228183	104005
SLS Invoice	228182	104004
SLS Invoice	228181	104003
SLS Invoice	228180	104002

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.



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	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)**.

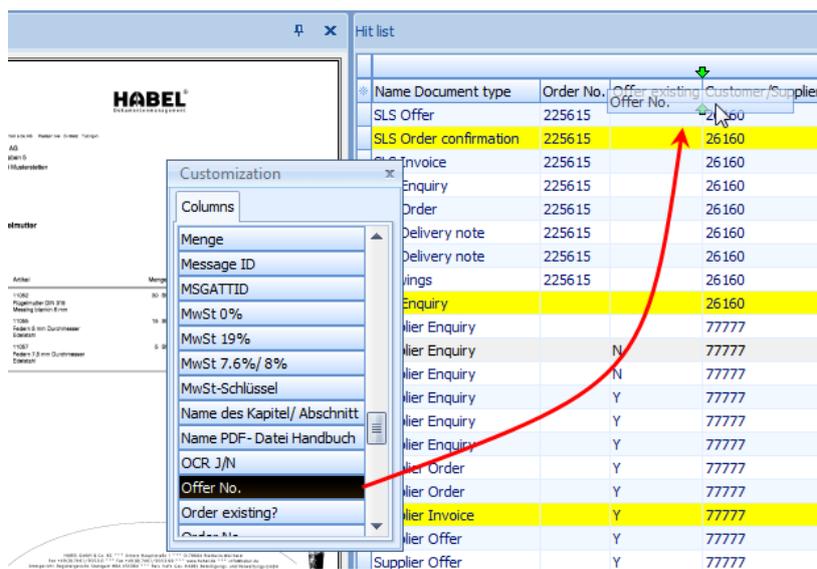
Selecting columns

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.



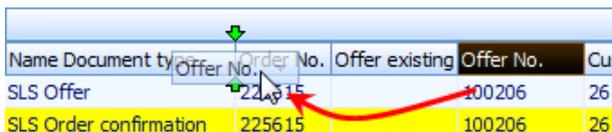
Hit list tab – Settings group – Columns button

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.



Adding the Offer No. column to the hit list

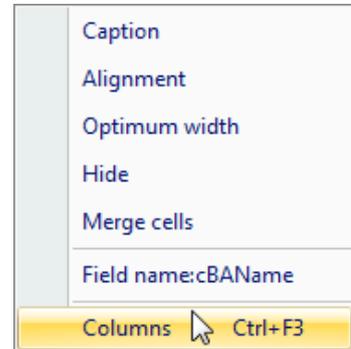
The sequence of columns can be varied by simply moving them from left to right or right to left. The new position for column is marked with two green arrows



Placing the column within a different location within the hit list

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

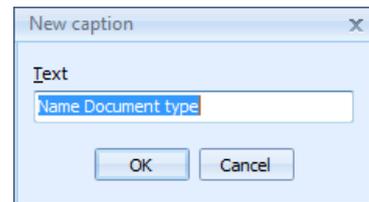
In addition, other functions are offered by the *Context menu* (right-click the column header).



SElecting columns over the context menu

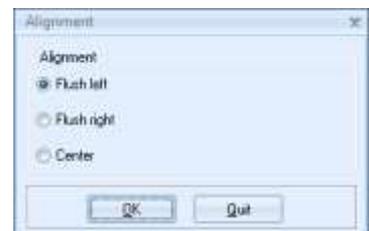
Caption

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

Hide

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

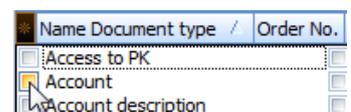
Compile cells

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

Offer No.	Customer/Supplier No.	Name
	70528	Bergn
100206		Inform
100206		Inform
103976	26160	Inform
103977		Inform
103978		Inform
103979		Feinm
103980	33333	Feinm
103981		Feinm

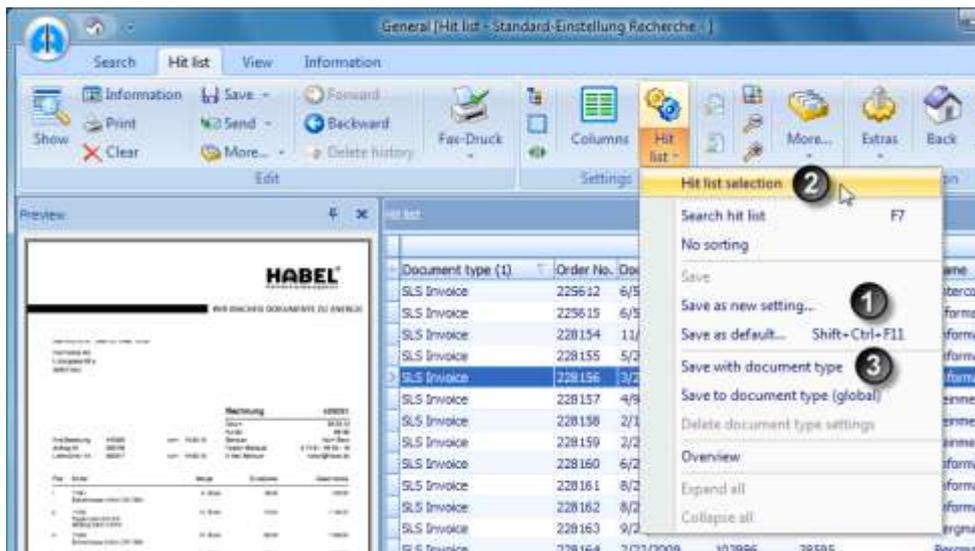
Columns

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

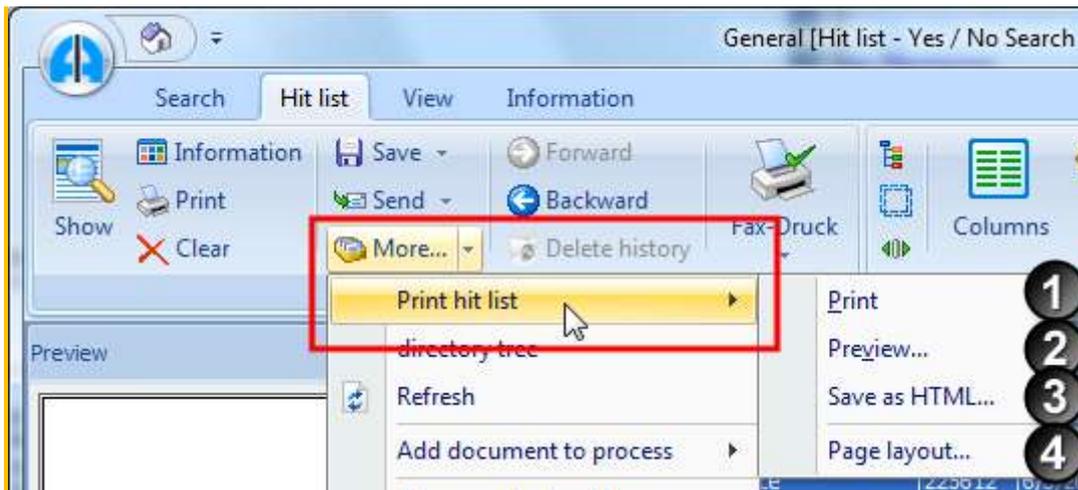


Overview Hit list selection

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.

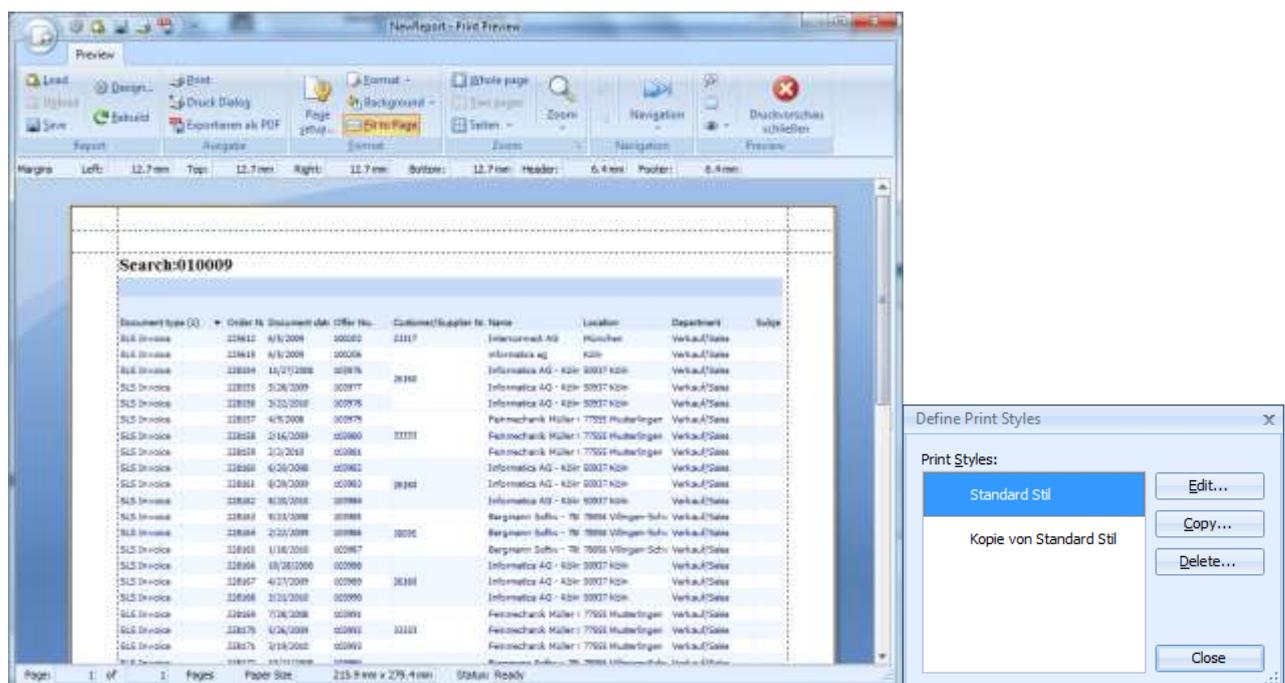
Printing the hit list

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*.



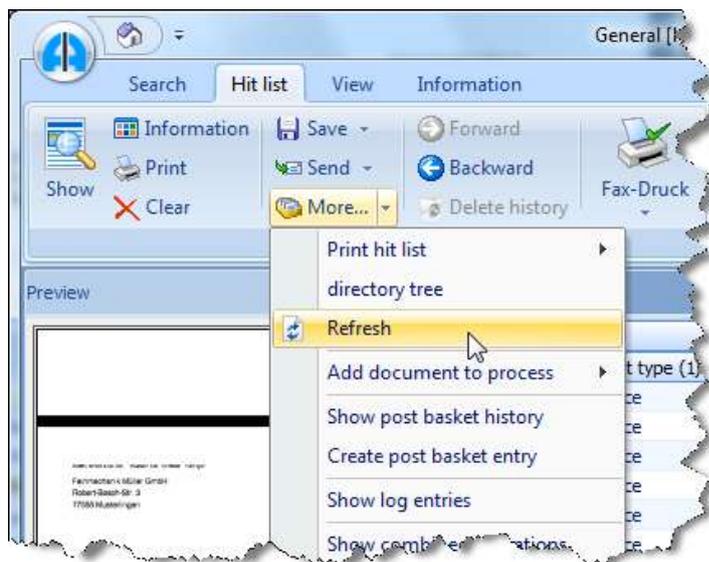
Hit list tab – Edit group – More button

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).



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

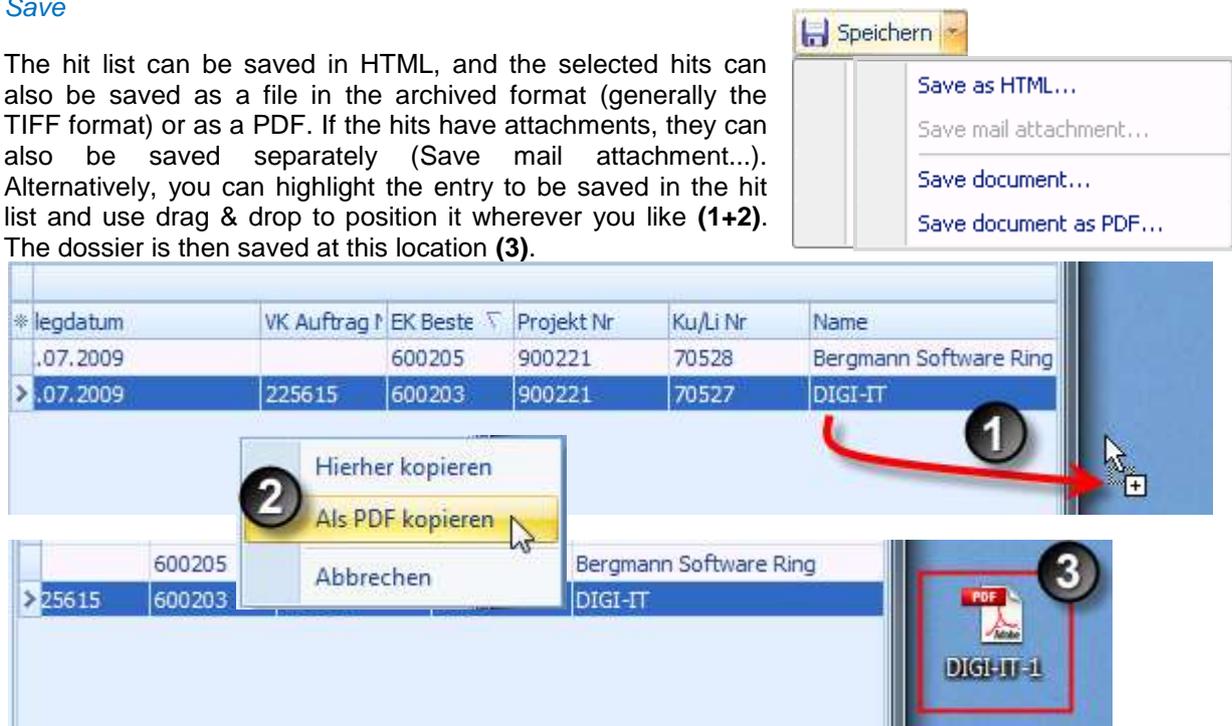
The currently displayed document can be printed out by clicking the printer symbol. Depending on settings, you will be asked about various options (printout with text: then the background text e.g. "print archive" is also printed on the document; print annotations: the attached information such as notes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

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)**.



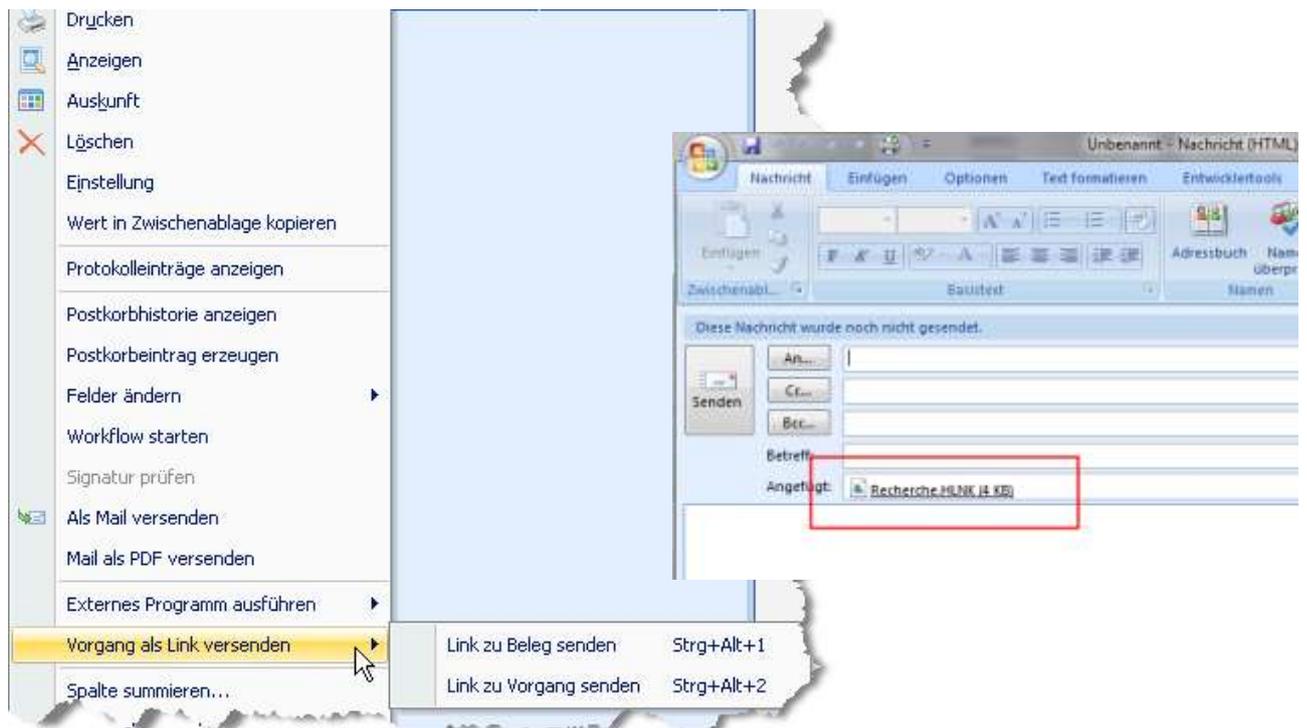
Sending

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 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.



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.



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:

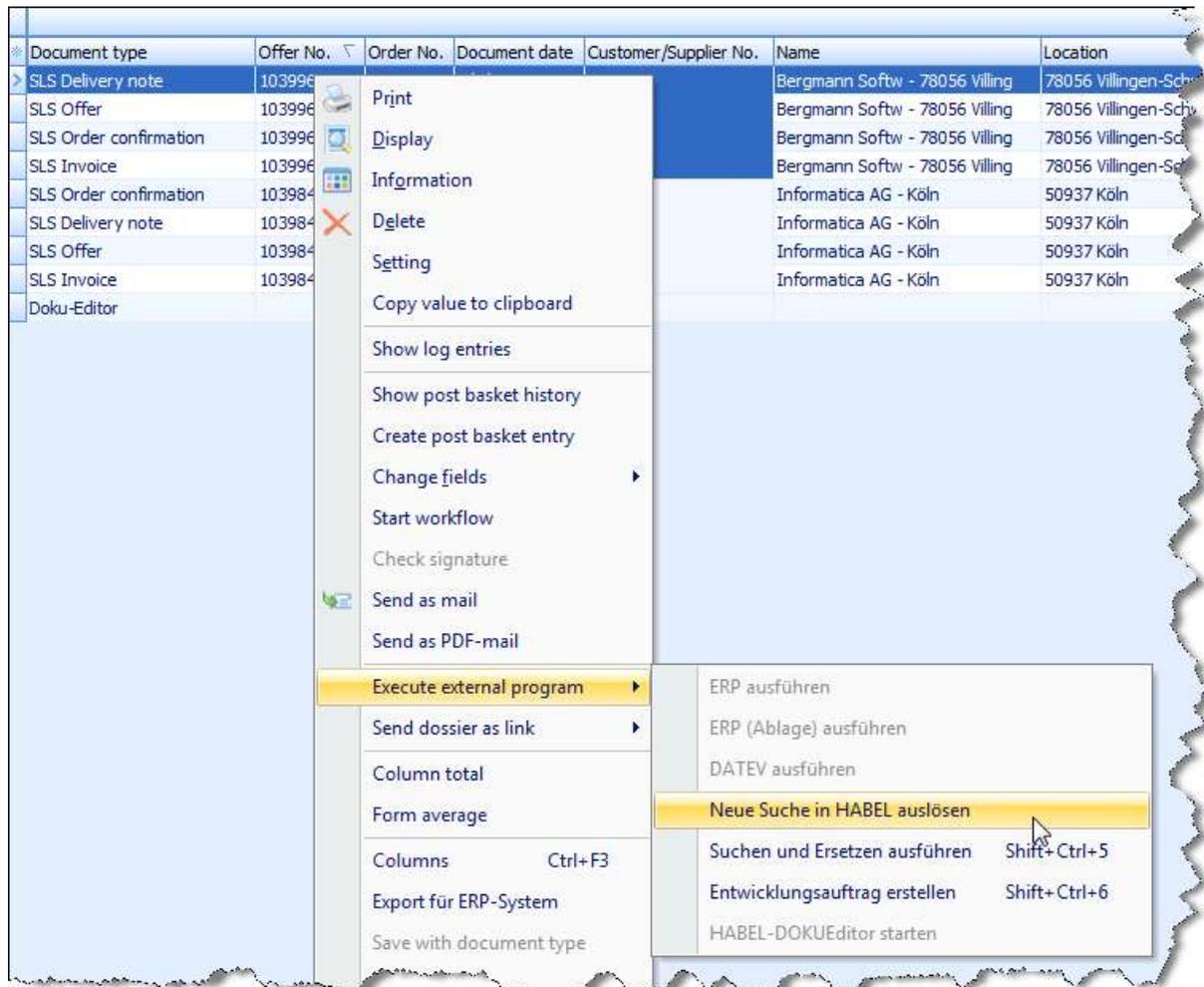
Only the currently clicked document is linked – there are no search criteria in the search path.



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.

Execute external program

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



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.

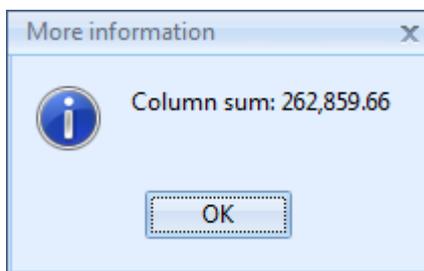
External programs such as an ERP program or financial accounting program can also be opened.

2. Using the contents of database fields

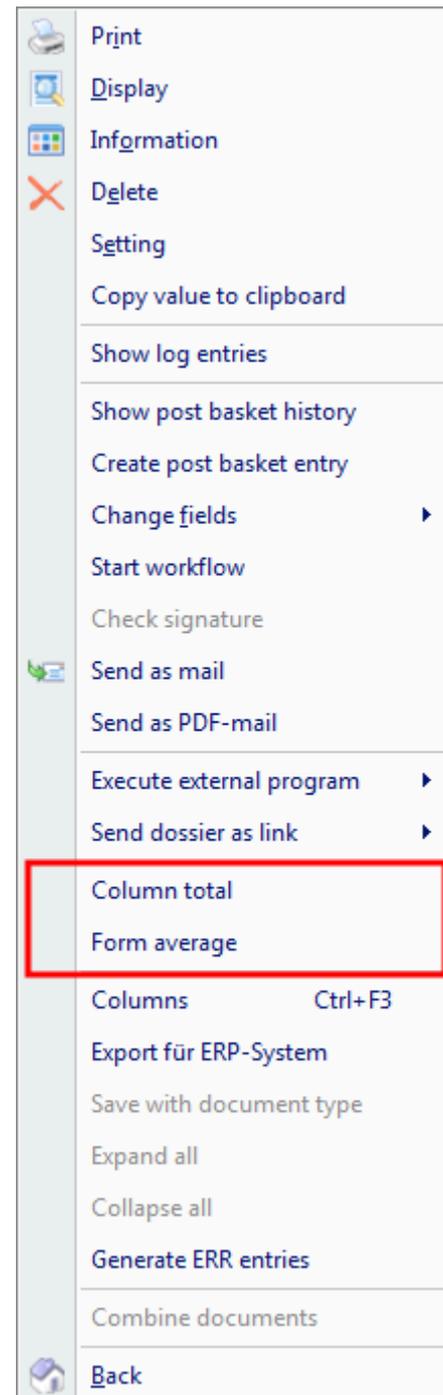
Additional functions can be accessed through the context menu in the hit list.

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.



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.

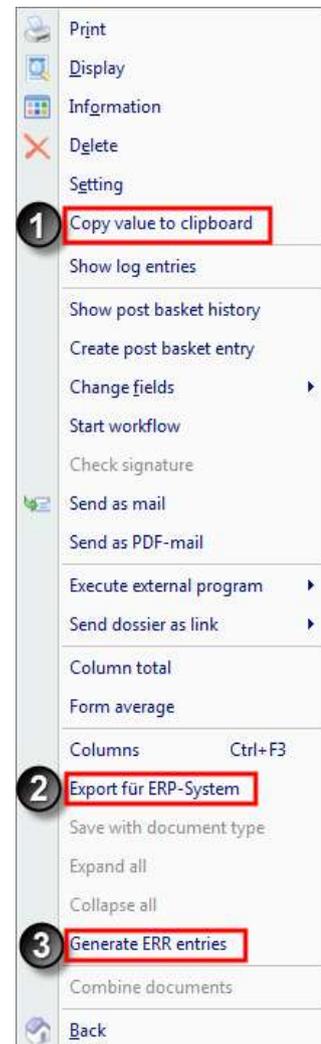
Generate ERR entries

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:

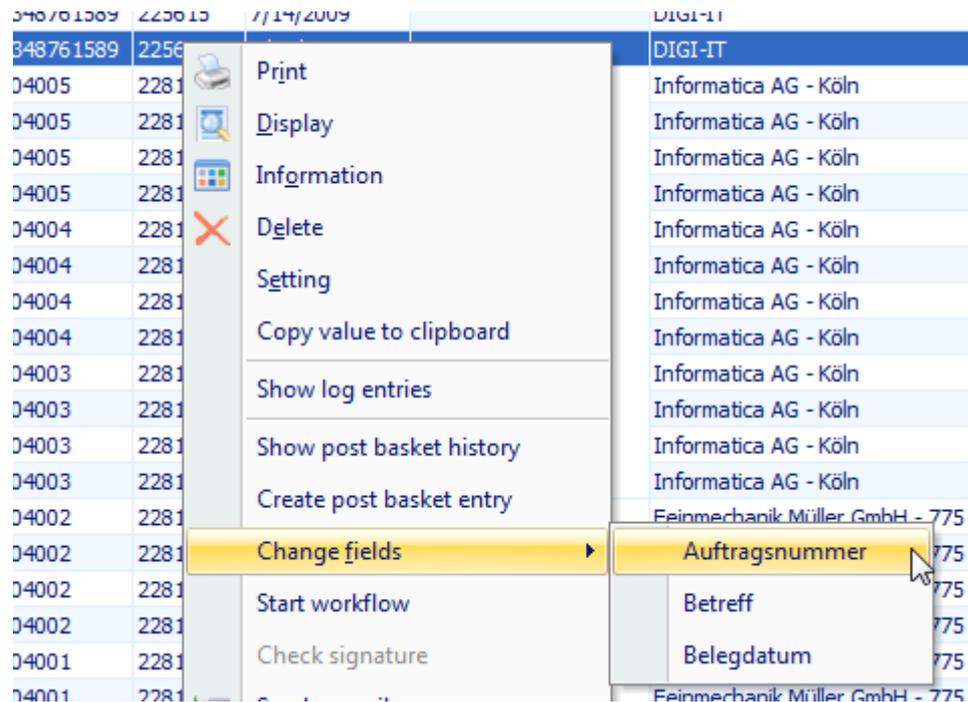
The necessary index criteria are already available for many documents when they are captured by external programs such as an incoming invoice in an ERP program. HABEL can use this for indexing. The document is therefore only captured by entering a unique criterion (ideally a barcode that is automatically 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.

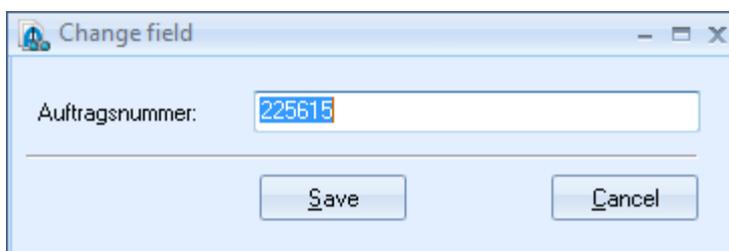


Change fields

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



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.



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.



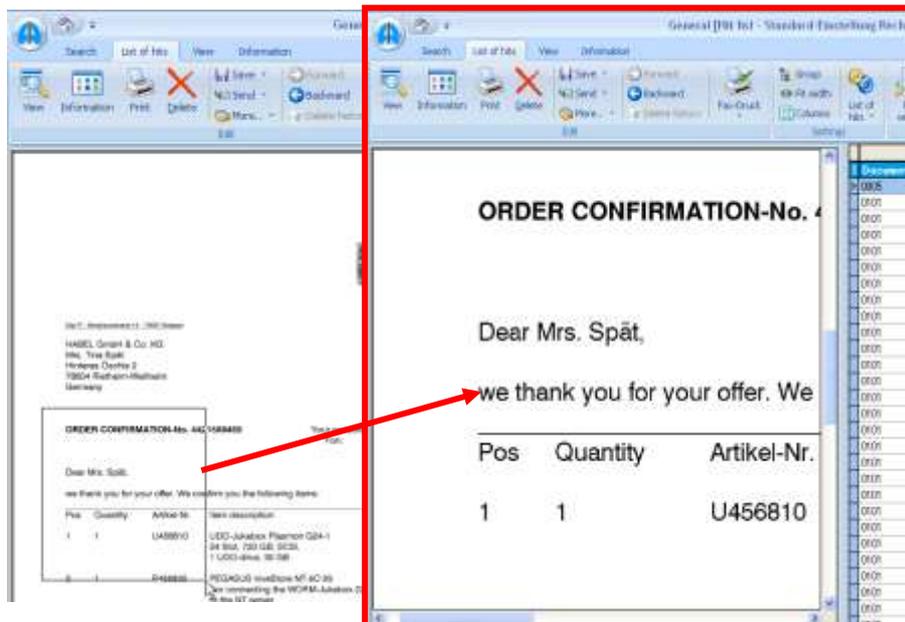
Hit list tab – Document preview group – More button

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)**.

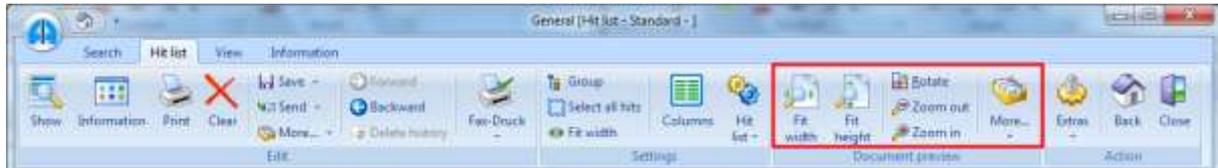


Zoom within the document preview



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 complete preview window. Return the document to normal size by double-clicking in the document preview.

Adapting the document preview



Hit list tab – Document preview group

	<p>Fit width The document is expanded to the maximum width of the document preview.</p>
	<p>Fit height The document is expanded to the maximum height of the document preview.</p>
	<p>Rotate The document is rotated.</p>
	<p>Zoom in/zoom out The document is enlarged or shrunk in the document preview.</p>

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

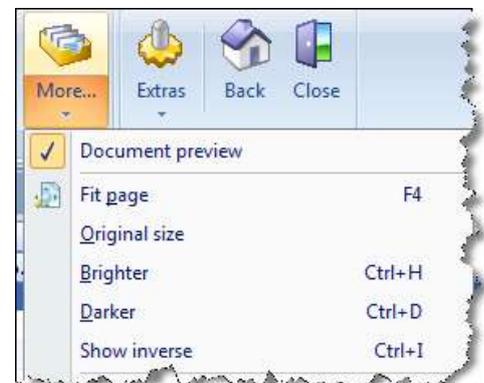
Display in the preview in original size.

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).

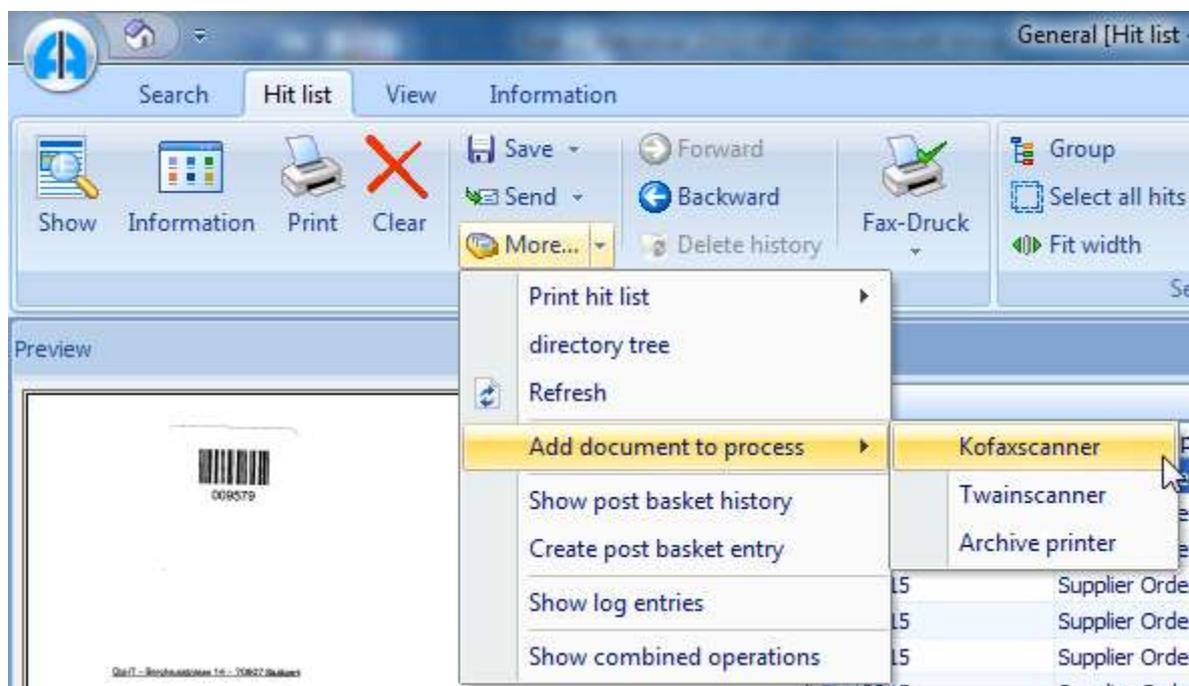


Inverse view of a document

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.



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.

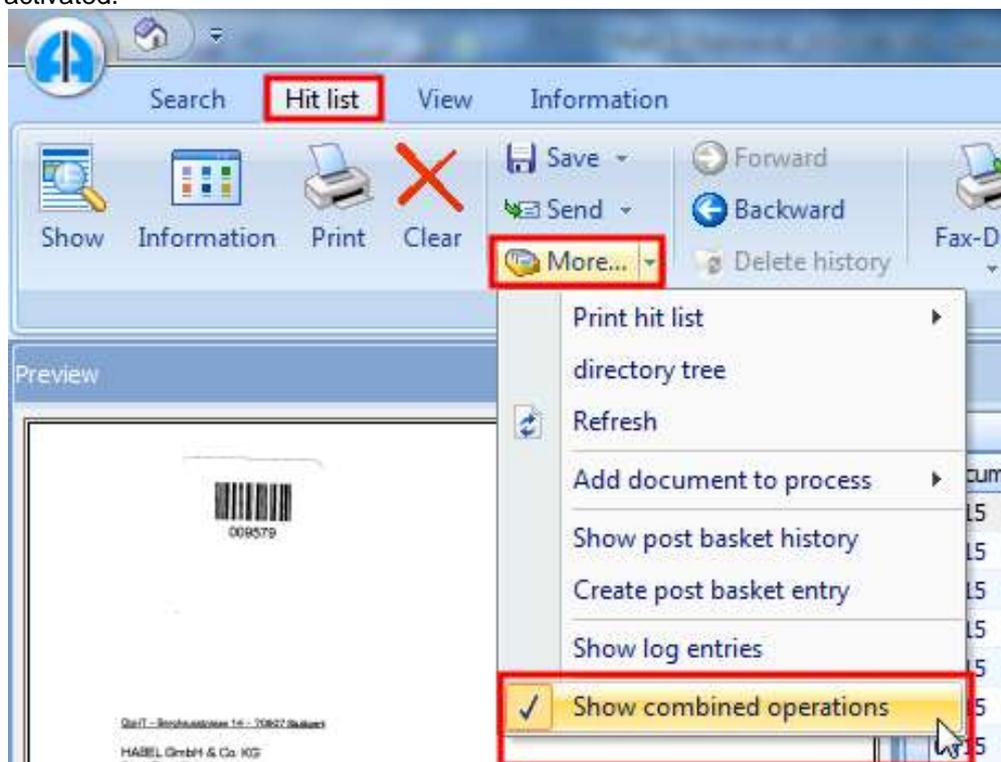
5. Combining operations

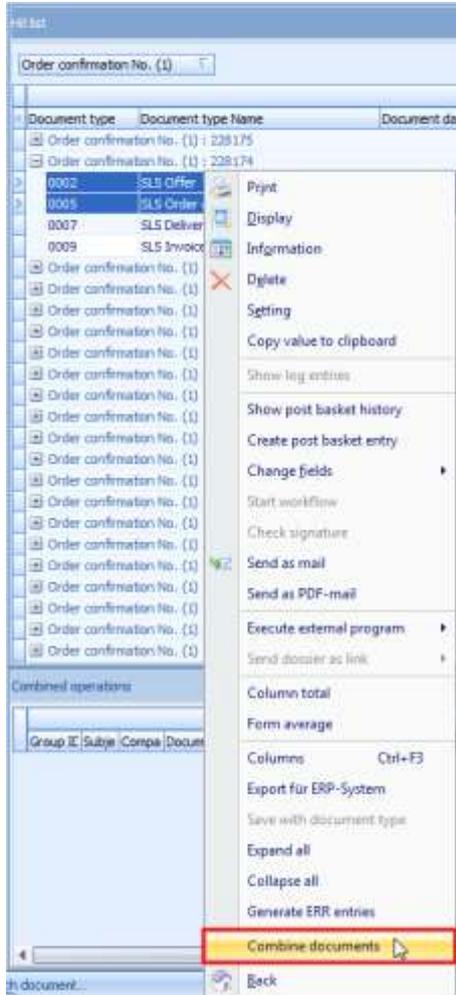
For combining single entries to operations, the function *Combining operations* was developed.

Examples for use:

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

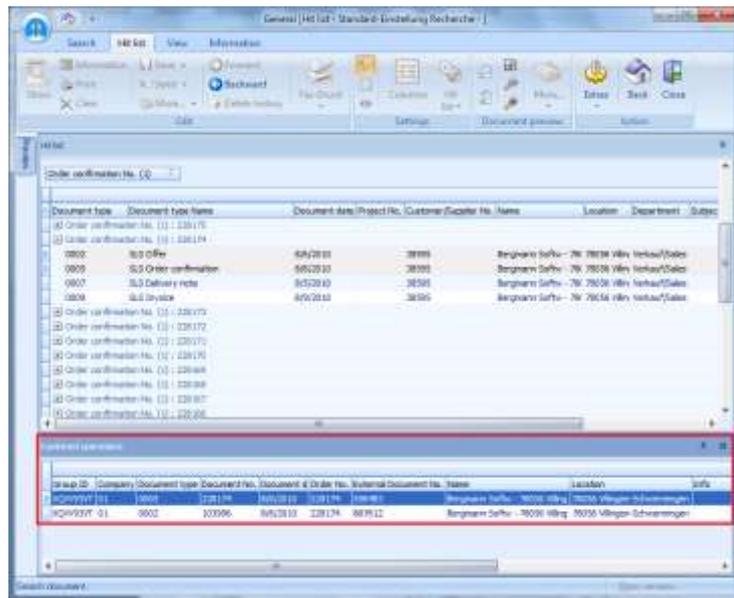
To combine operations, virtual groups are created. They can be created either manually or through a special development also automatically. For the manual combining at first the command has to be activated.



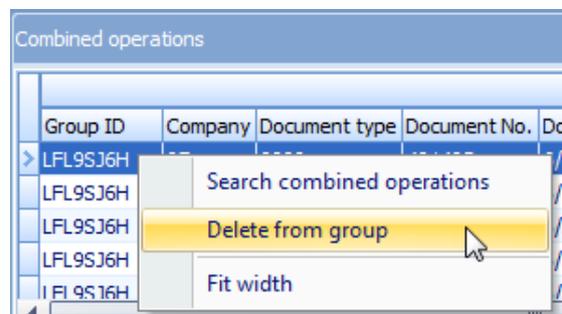
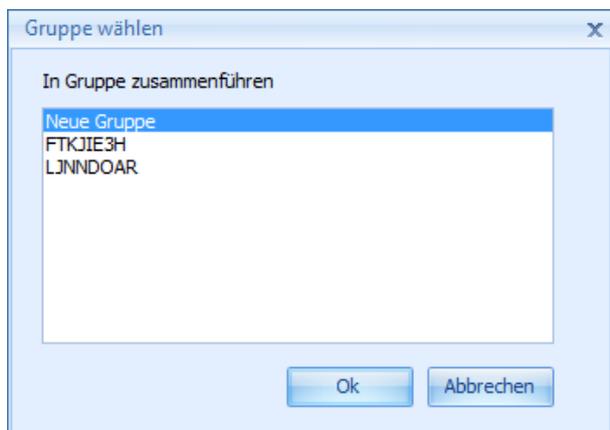


As a second step, the results are to be highlighted and summarized in a virtual group over the context menu *Combine operations*.

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

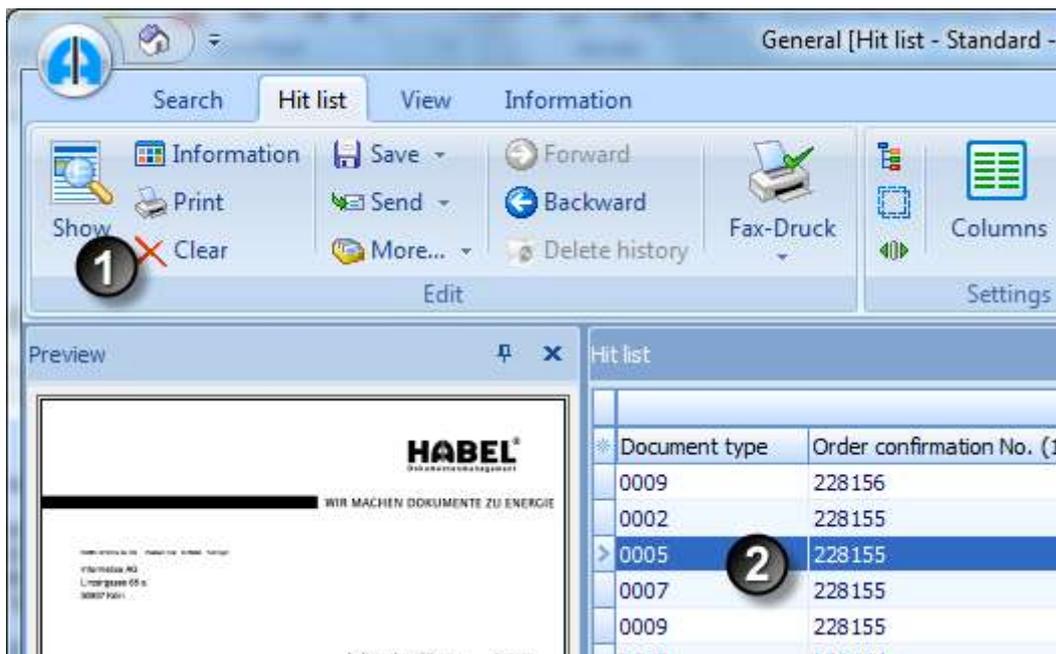


If documents, which already belong to a group, are combined, a query is executed whether the document should be added one of the groups or a new group should be created. It is also possible to remove documents from groups and to search summarized documents. The function is available via the context menu. 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*. Therefore 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.



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.



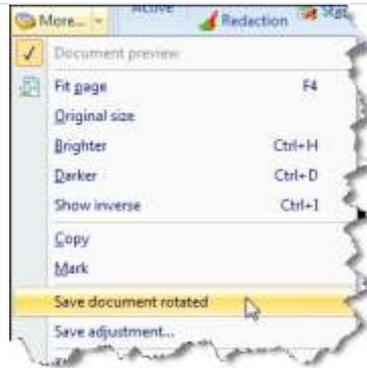
View tab

1. Settings

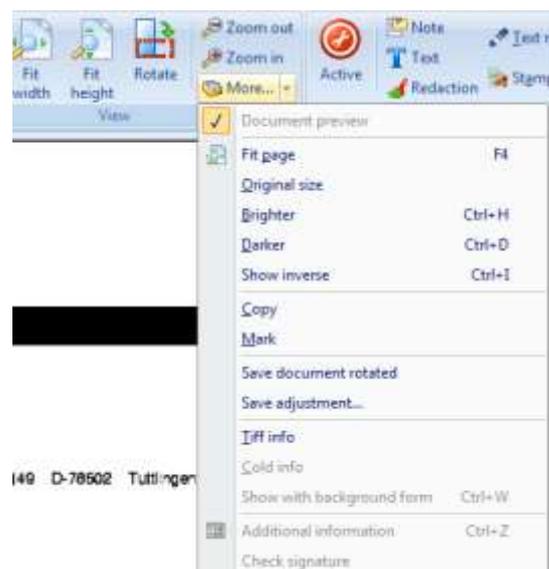
Adapting the document display

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

	<p>Fit width The document is expanded to the maximum width of the document preview.</p>
	<p>Fit height The document is expanded to the maximum height of the document preview.</p>
	<p>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>.</p>
	<p>Zoom in/zoom out The document is enlarged or shrunk in the document preview.</p>



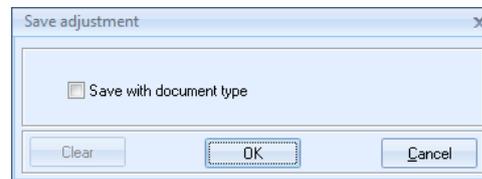
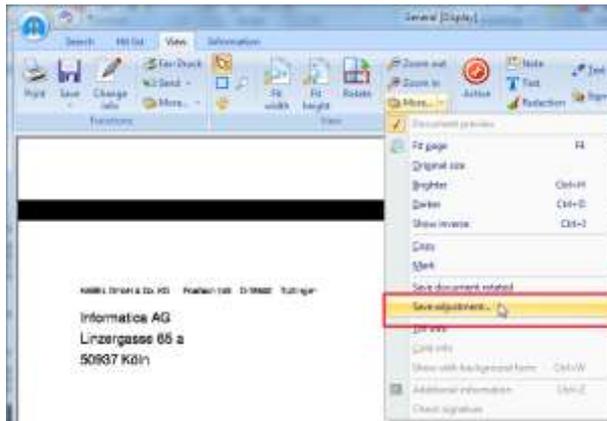
In the *View* tab – *View* group - *More* button, you can find numerous functions that can be used like the document preview: Fit page, original size, brighter, darker, and inverse.



View – View – More

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).



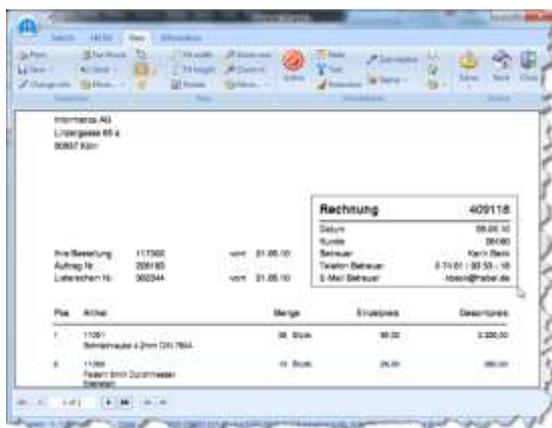
You can reset this setting by clicking the Delete button.

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.



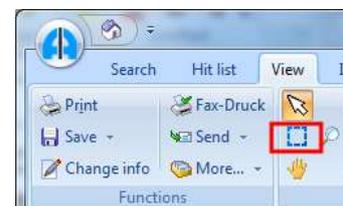
Rechnung **409118**

Datum 28.05.10
 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.



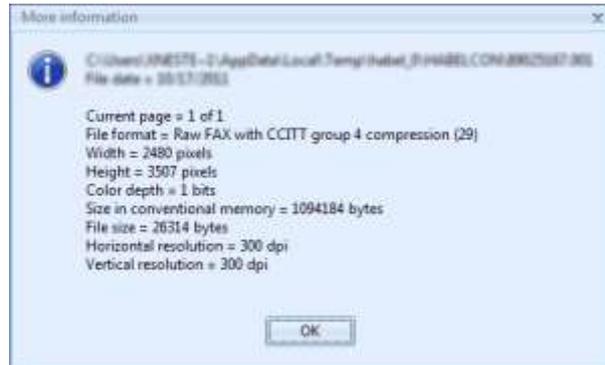
Additional functions in the More button

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**.



Check signature



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

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.



View tab – *View* group

	<p>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.</p>
	<p>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.</p>
	<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.</p>

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.).

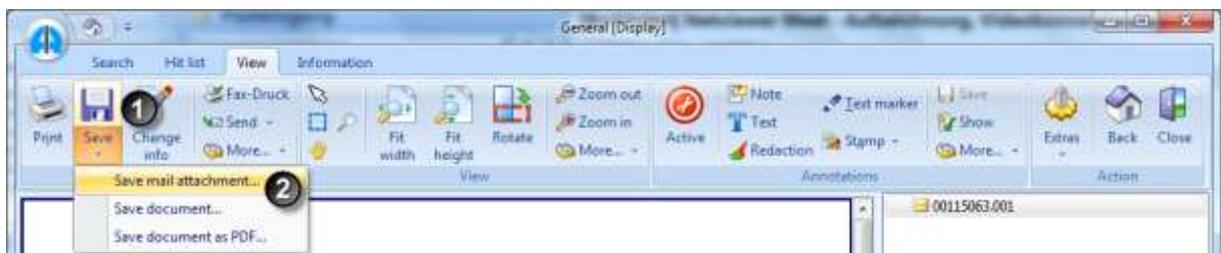


View tab – Functions group – Print button

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)**.



View tab – Functions group – Save button



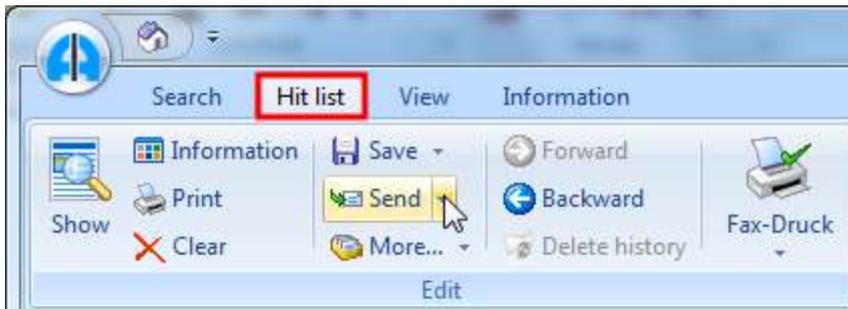
Below the button further functions are available **(2)**. Dossiers that have attachments (such as emails that are displayed condensed) can be saved separately by selecting the menu item *Save mail attachment*. After the command is selected, define the directory in which you want to separately save the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

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.



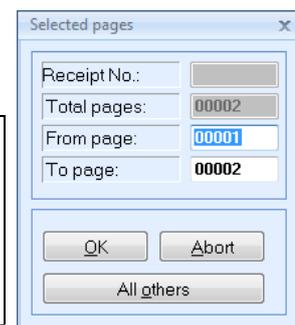
View tab – Function group – Send button



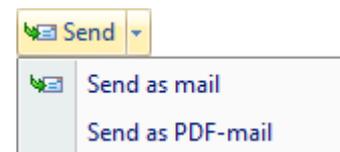
Hit list tab – Edit group – Send button

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

	<p>The commands can also be accessed by right-clicking the context menu.</p>
---	--



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.



3. Affix annotations

Various annotations can be affixed to the document in the document display:

- Notes
- Texts
- Markings
- Editings
- Stamps



View tab – Annotations group

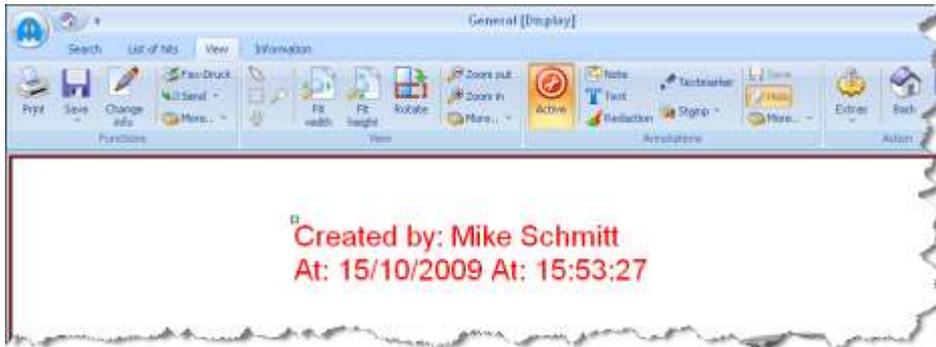
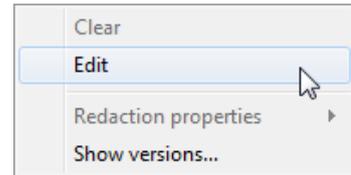
The following functions can only be used in conjunction with the module **HABEL ANNOTATIONS** and are also only active in document display mode.

	<p>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.</p>
---	---



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.

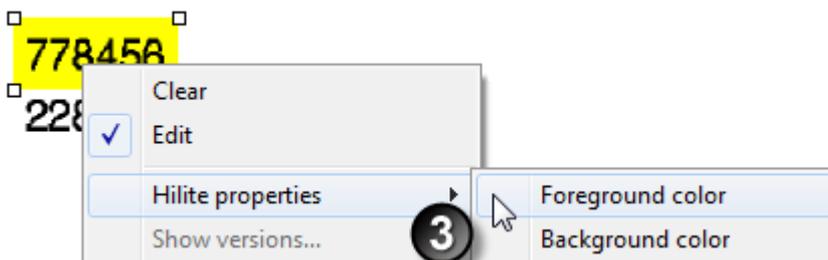


Text marker

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).

Ihre Bestellung **778456** ①
Auftrag Nr. 228178

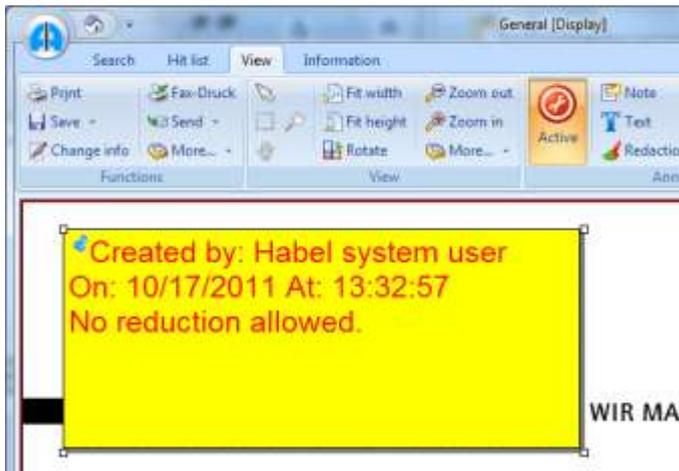
Ihre Bestellung **778456** ②
Auftrag Nr. 228178





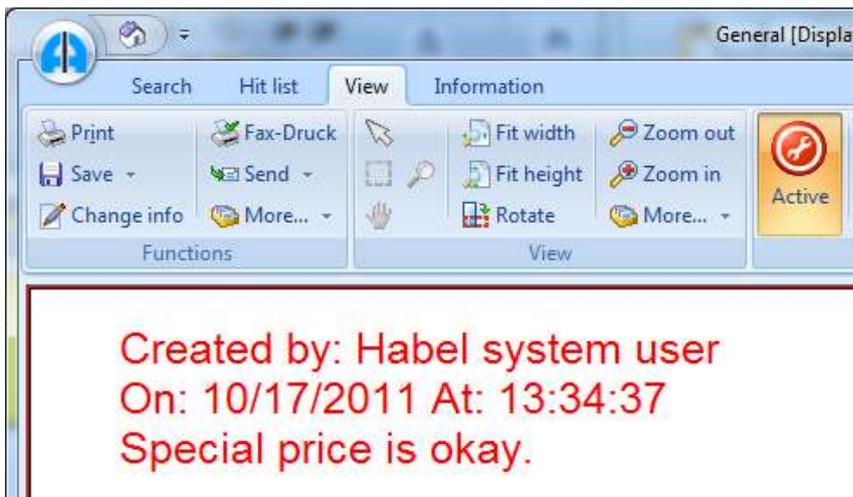
Notes

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.



Text

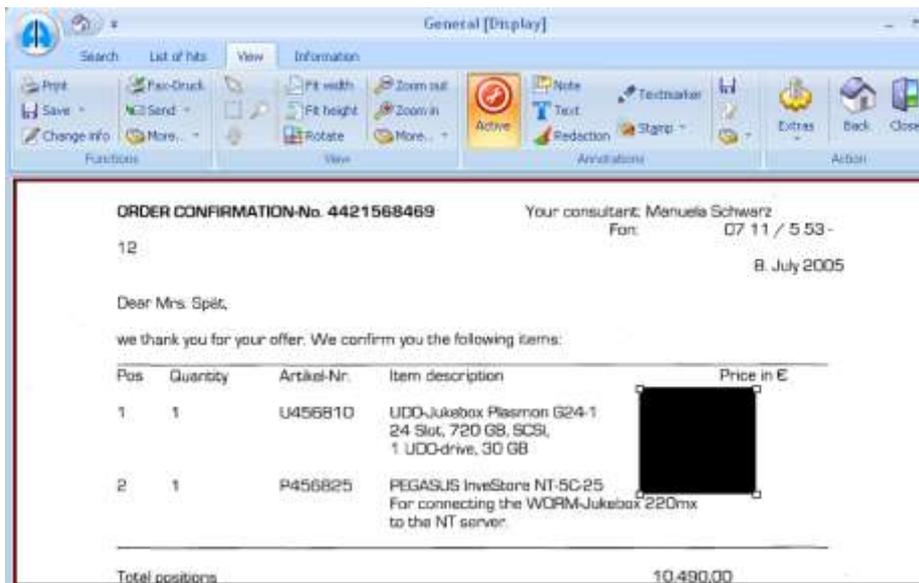
If you just want to add passages of text to the document you can use this function to compile free text.





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").



Stamp

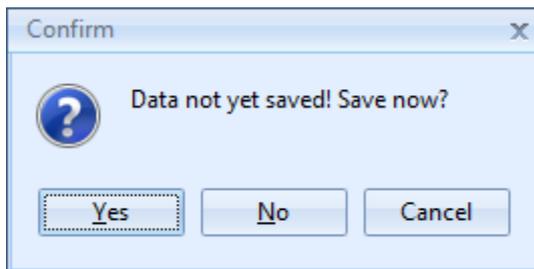
Use this icon to apply stamps to the document. The stamps available are predetermined. The individual stamps can be accessed via a selection box. To apply the stamp select your required stamp and use the mouse to drag it to the document into the correct position and size.





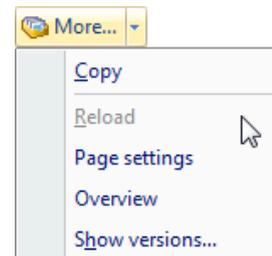
Save

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.



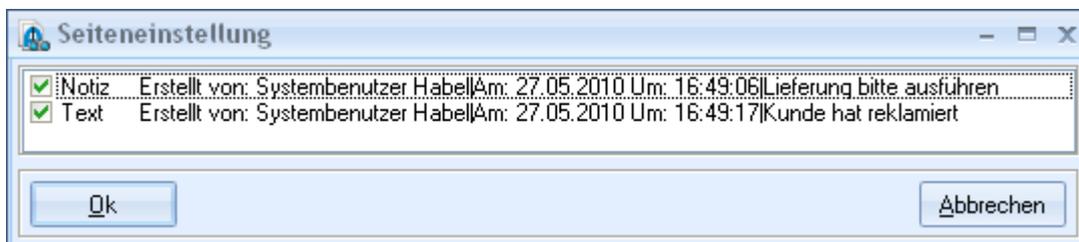
Reload

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



Page settings

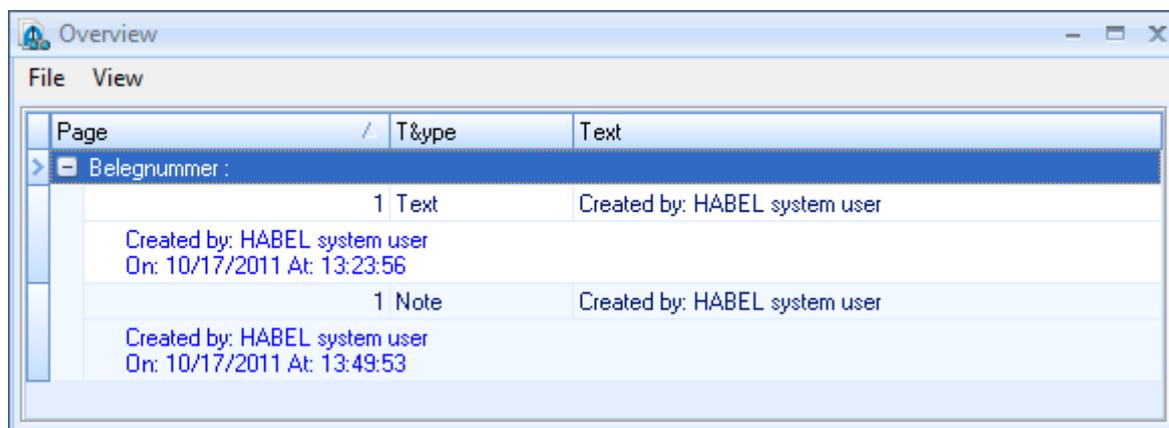
To print a document, the default settings can also be deactivated on a one-time basis via the page settings function. A selection box appears with information on text and notes and how they are to be processed in accordance with the default print settings. If, for example, you do not want to include 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.



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.



The screenshot shows a window titled 'Overview' with a 'File View' menu. The main content is a table with three columns: 'Page', 'T&ype', and 'Text'. The table contains two entries, each with a sub-row for details.

Page	T&ype	Text
Belegnummer :		
1	Text	Created by: HABEL system user
Created by: HABEL system user On: 10/17/2011 At: 13:23:56		
1	Note	Created by: HABEL system user
Created by: HABEL system user On: 10/17/2011 At: 13:49:53		

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

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.

Created by: Habel system user
On: 10/17/2011 At: 14:03:56
No discount!

HABEL[®]
Dokumentenmanagement

WIR MACHEN DOKUMENTE ZU ENERGIE

Version	Benutzer	Datum	Zeit	Aktion
1	Habel	10/17/2011	14:04	Preparation
2	Habel	10/17/2011	14:04	Change

Display Close

HABEL GmbH & Co. KG Postfach 149 D-78602
Informatica AG
Linzergasse 65 a
50837 Köln

Ihre Anfrage 998078 vom 15.08.10
Auftrag Nr. 228182

Angebot 100504
Datum 18.08.10
Kunde 26160
Betreuer Karin Beck
Telefon Betreuer 0 74 61 / 93 53 - 18
E-Mail Betreuer kbeck@habel.de

Hide / show annotations

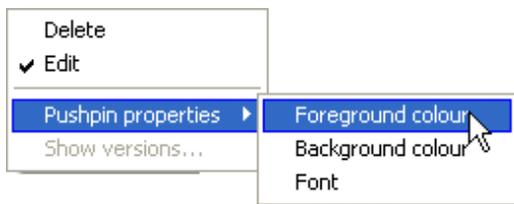
By clicking on this icon you can hide and show all annotations applied to the document such as notes, highlights and stamps.



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



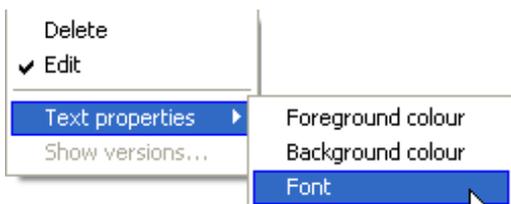
Delete removes the attached note, the tick beside the "Edit" command shows that the editing mode is active for the note. *Properties* allows you to change the foreground and background color and the size, type and color of the font.

Redaction



Delete 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*.

Text



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

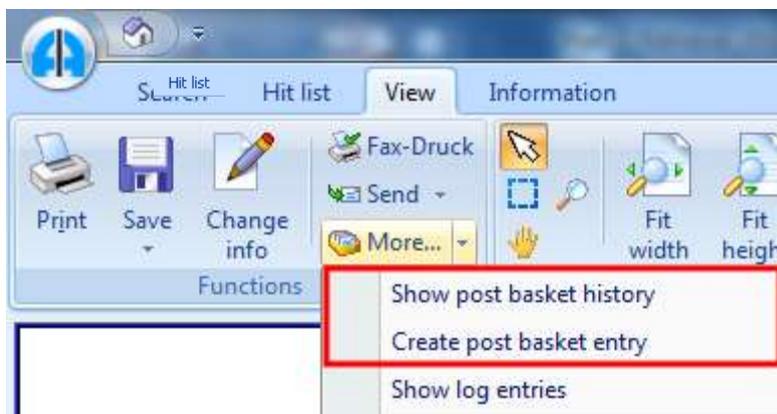


Delete removes the attached note, the tick beside the "Edit" command shows that the editing mode is active for the note. You cannot make adjustments to the stamp as it is a graphics file.

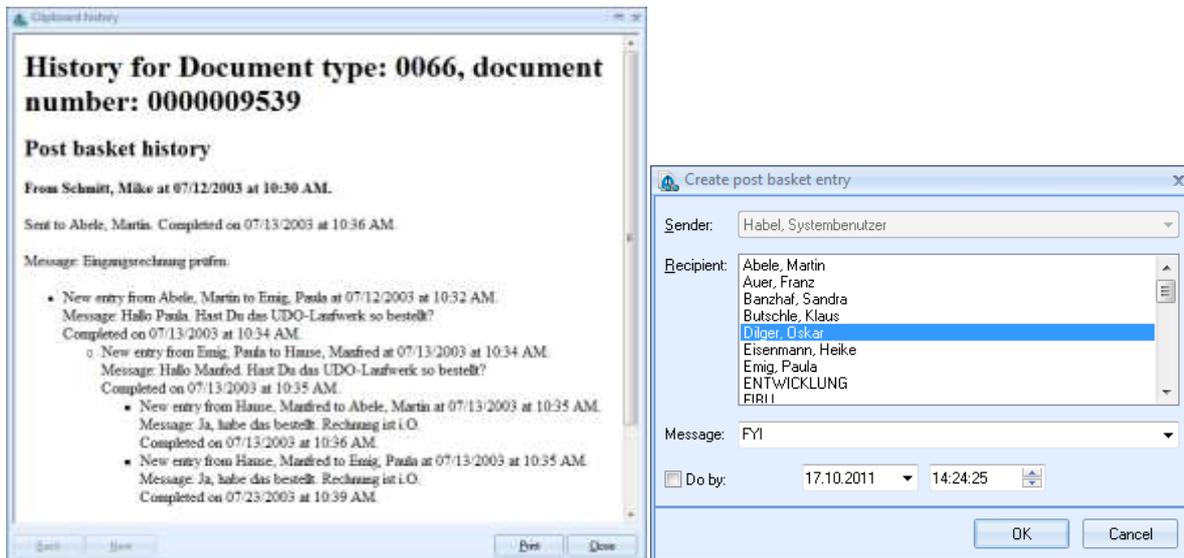
4. Logs and history

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*.



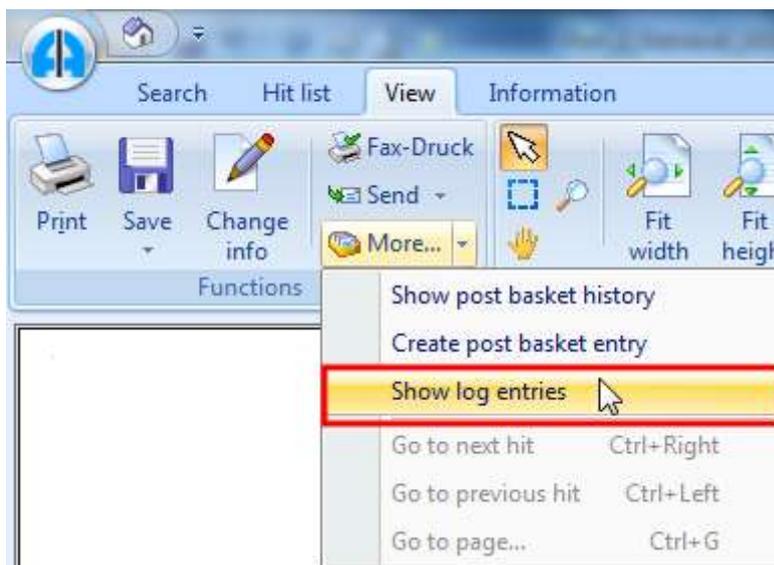
View tab- Functions group – More button



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

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

The screenshot shows the 'Log' window with a table of document actions. The table has columns for File No., Page No., Date, Time, User, and Action. The data is as follows:

File No.	Page No.	Date	Time	User	Action
2400021	0	5/14/2008	10:00:20	mike.schnitt	Show
2400021	0	5/14/2008	10:00:20	mike.schnitt	Show
2400021	0	5/14/2008	10:03:41	mike.schnitt	Print
2400021	0	5/14/2008	10:03:48	mike.schnitt	Show
2400021	0	5/14/2008	10:06:35	mike.schnitt	Show
2400021	0	6/18/2008	13:12:34	Habel	Show
2400021	0	8/25/2008	10:58:19	Habel	Show
2400021	0	8/25/2008	10:58:19	Habel	Information
2400021	0	8/25/2008	10:58:19	Habel	Information
2400021	0	8/25/2008	10:58:40	Habel	Show
2400021	0	2/23/2009	09:44:44	Habel	Show
2400021	0	2/23/2009	09:48:11	Habel	Show
2400021	0	2/23/2009	10:00:17	Habel	Show
2400021	0	2/23/2009	13:31:24	Habel	Show
2400021	0	2/23/2009	13:32:13	Habel	Show
2400021	0	2/23/2009	13:33:36	Habel	Show



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

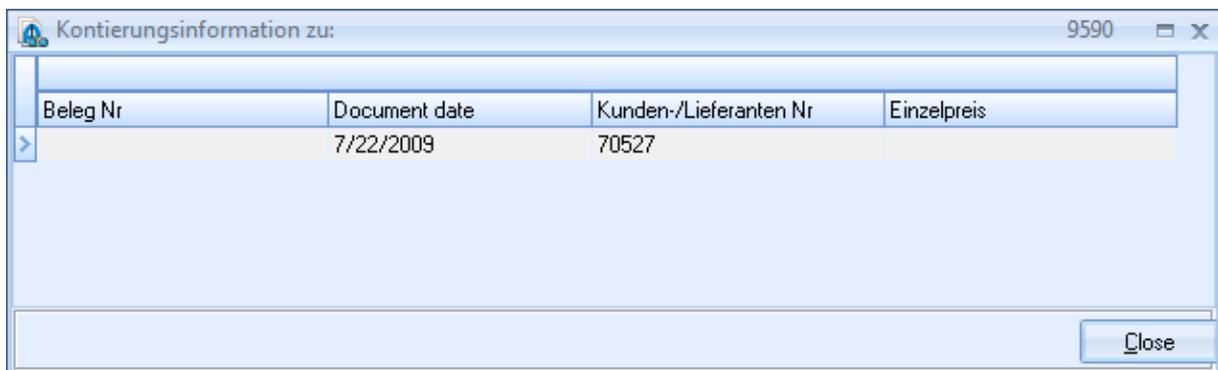
5. Printing of text lines

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.

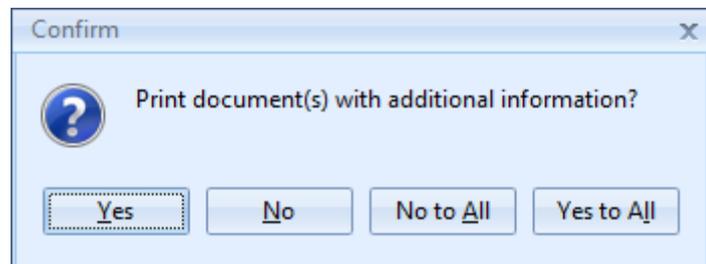


6. HABEL-ACCOUNT ASSIGNMENT STAMP

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.

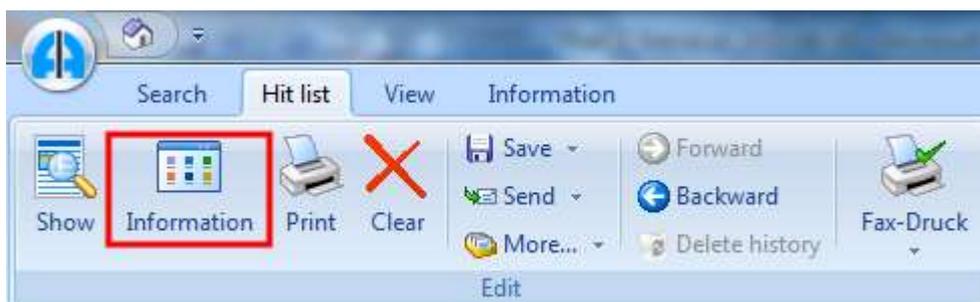


When printing you will be asked whether you also want to print the additional information (account assignment) on the document.

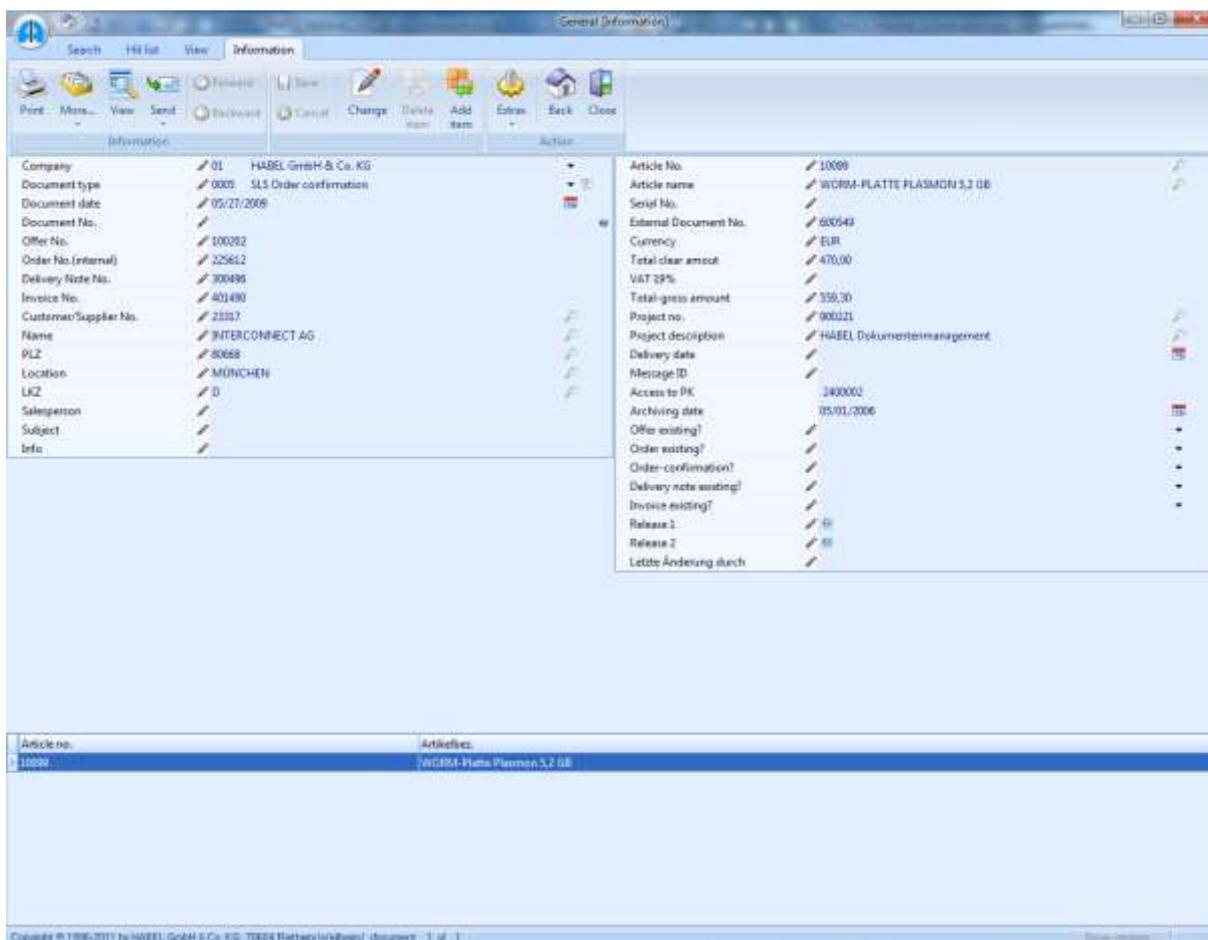


Document information

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



Document information

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

Printing and viewing

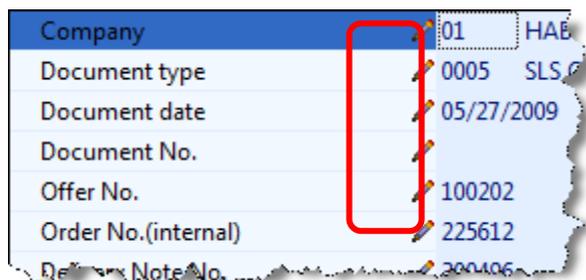
Select *Print* to print out the document from the current dossier. Select *View* to view the dossier.



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.



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.

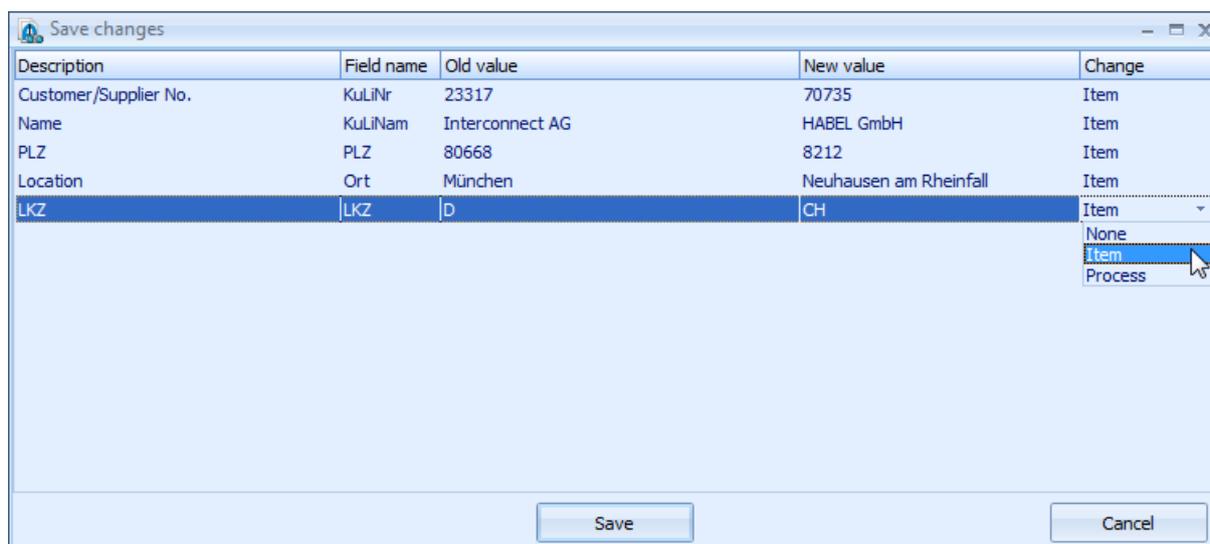
With *Change* the editing mode will be activated. You can execute the changes by clicking in the input fields. The changes will be saved with *Save* or cancelled with *Cancel*.



Information tab – Changes group

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.



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



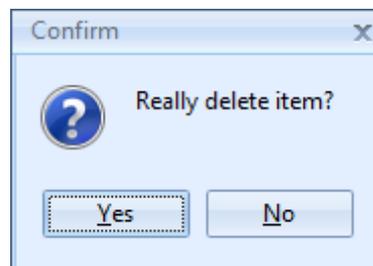
nach Klick auf die Schaltfläche Position hinzufügen

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

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.



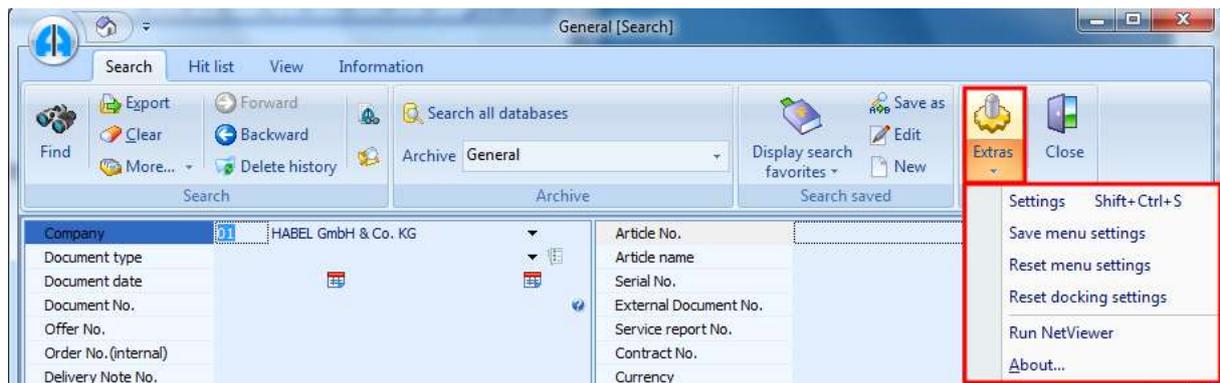
If you select several entries in the hit list and switch to Information, you can change back and forth between the individual entries with the *Forward* and *Backward* buttons.



Information tab – Information group – Forward / Backward button

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

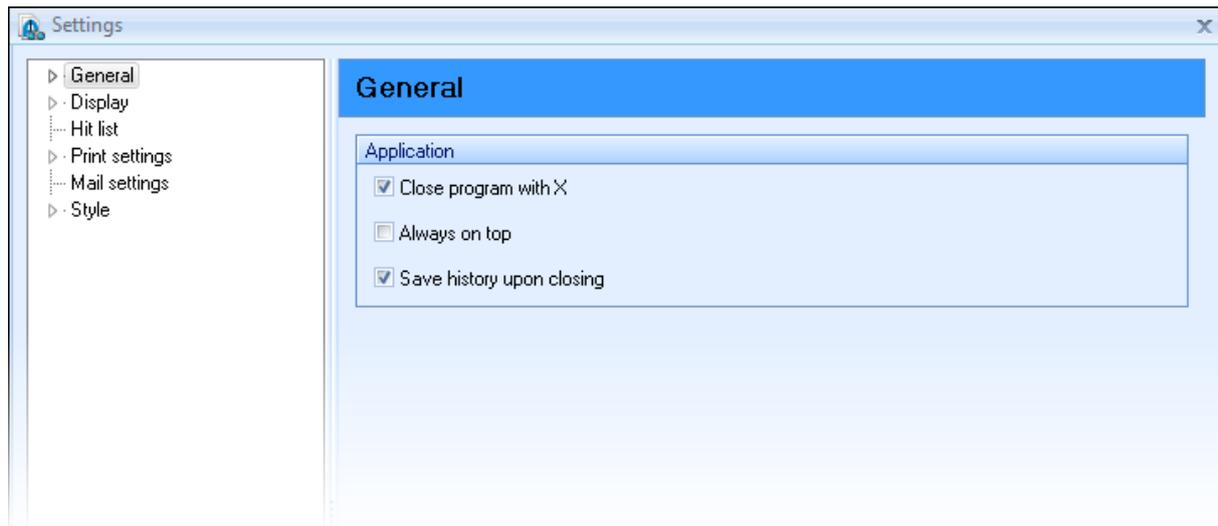
The command *Run NetViewer* automatically starts downloading and running the NetViewer that is used by HABEL employees to contact each other at their workplace and make arrangements or provide help.

Information

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

1. Settings

General



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.



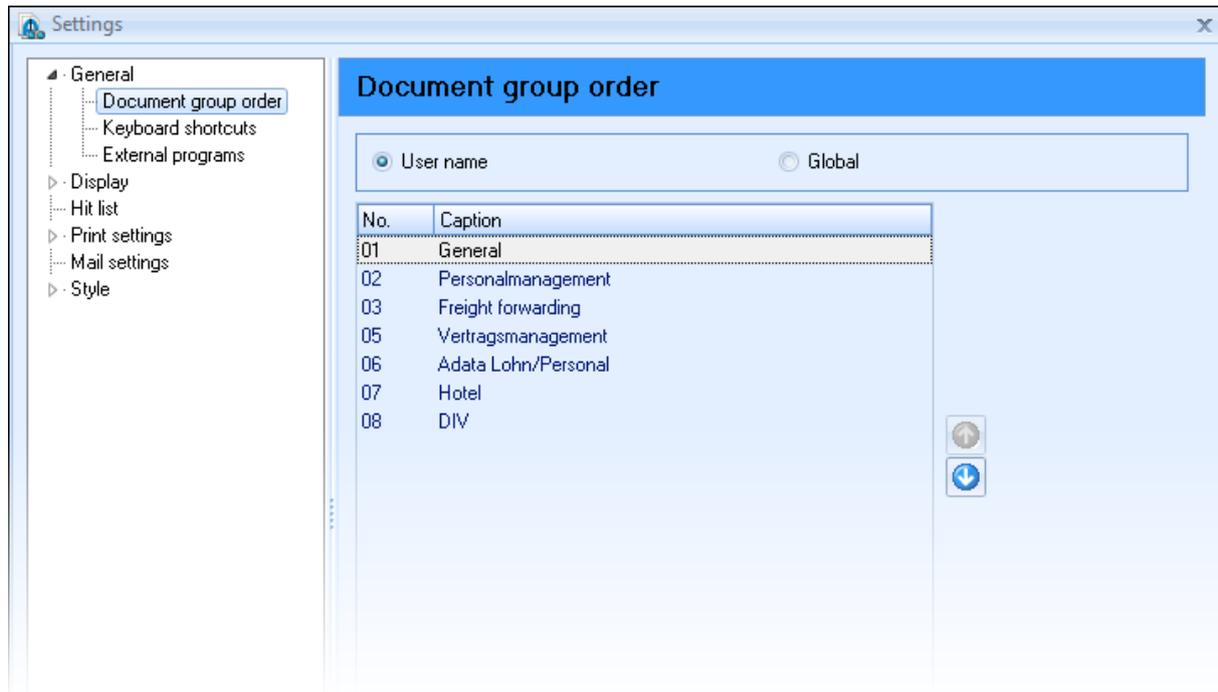
The selected function continues beyond the end of the search.

- 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)

General – Document group order

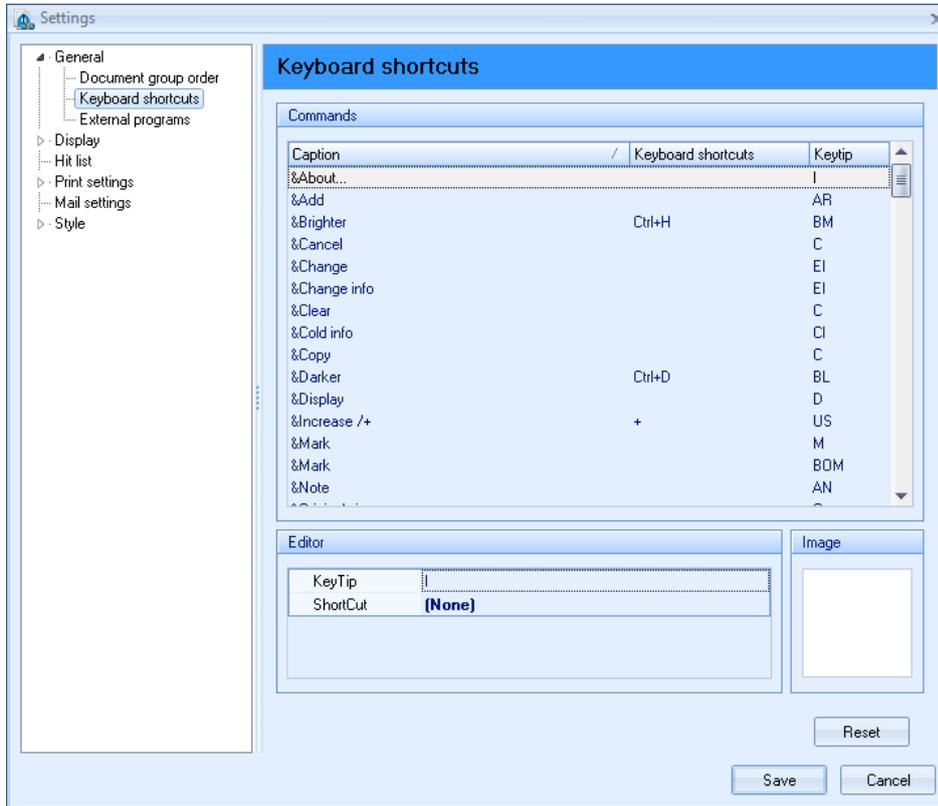


All tabs – Action group – Extras button – Settings menu item

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.

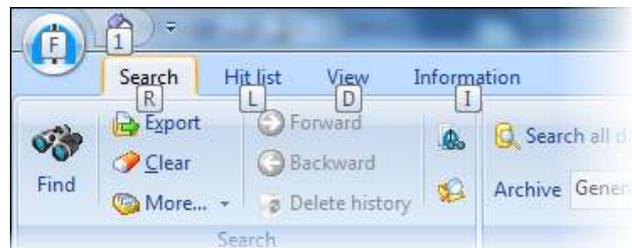
General – Keyboard shortcuts



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

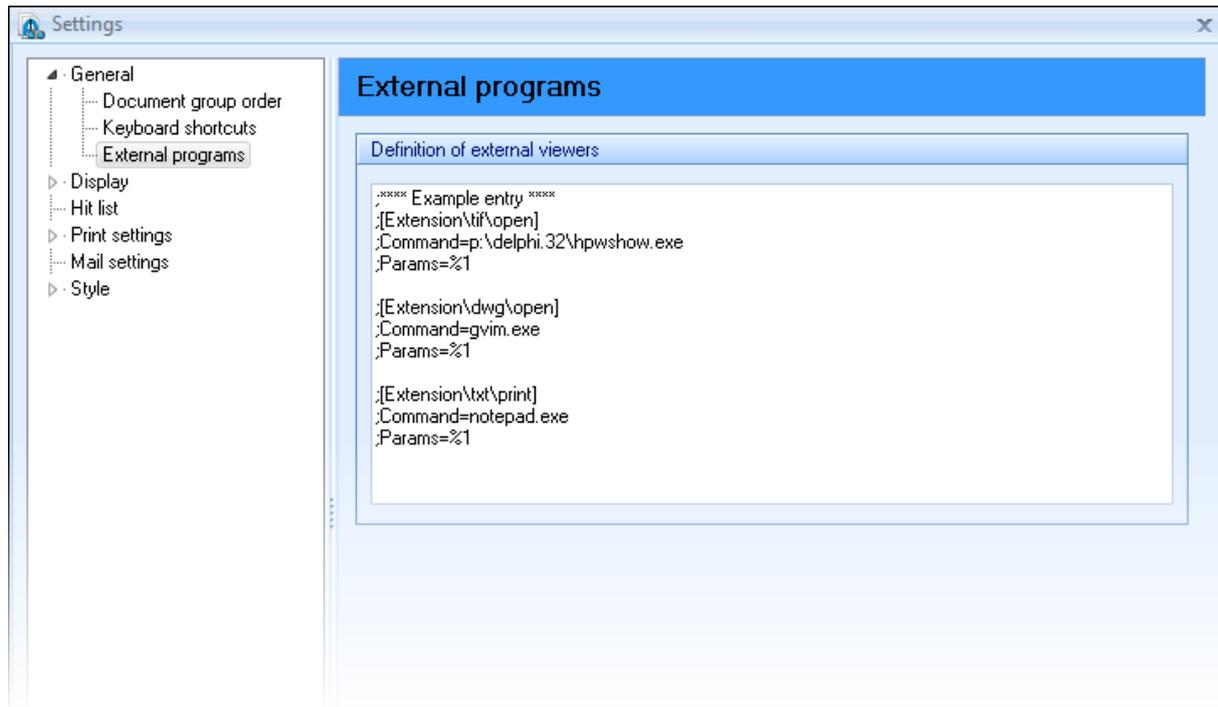
You can define own shortcuts for the quick call of commands with the editor. Choose the corresponding command in the table. The definition or edit of the shortcut is executed in the editor. Under KeyTip you can enter the combination of letters / numbers, which will be visible in the menu by pressing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

General – External programs



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).

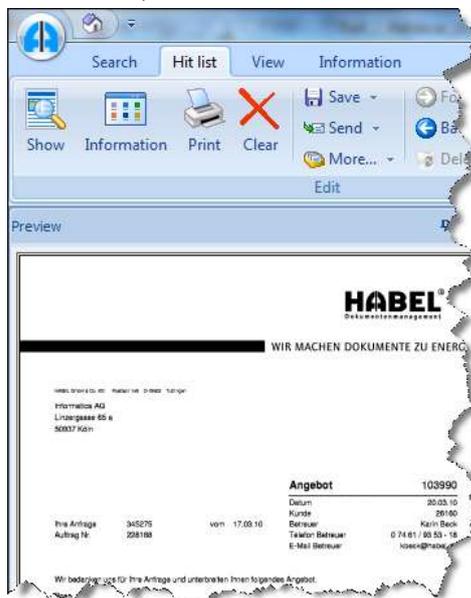
Display



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).



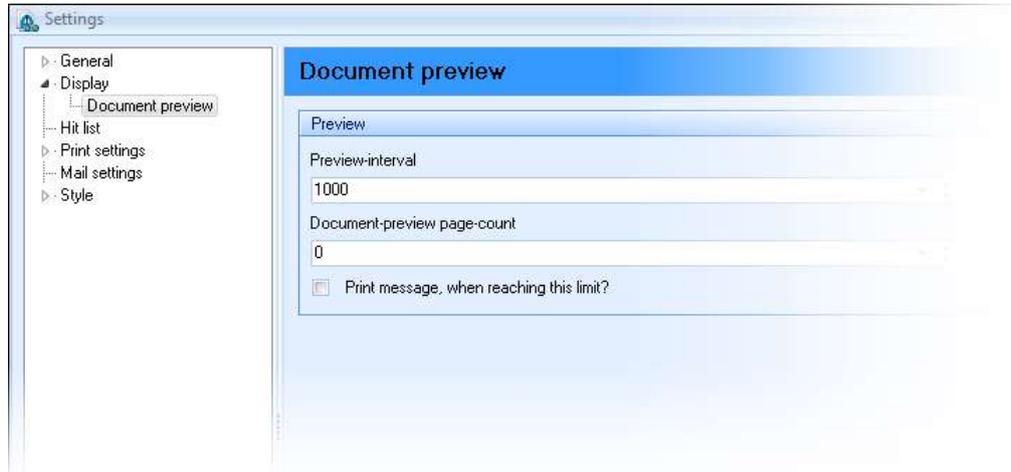
with document optimizing



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.

Display – Document preview



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.

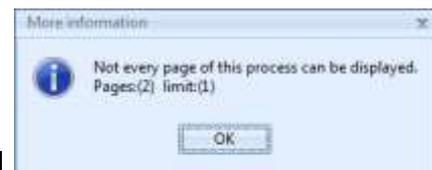


If the documents are not in the cache directory (but e.g. on a jukebox) and the interval will be adjusted very low (<1000 ms), almost every document will be recognized as identified while you scroll through the hit list. For each identified document a query will be sent to the Jukebox to deliver the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

Document preview page count

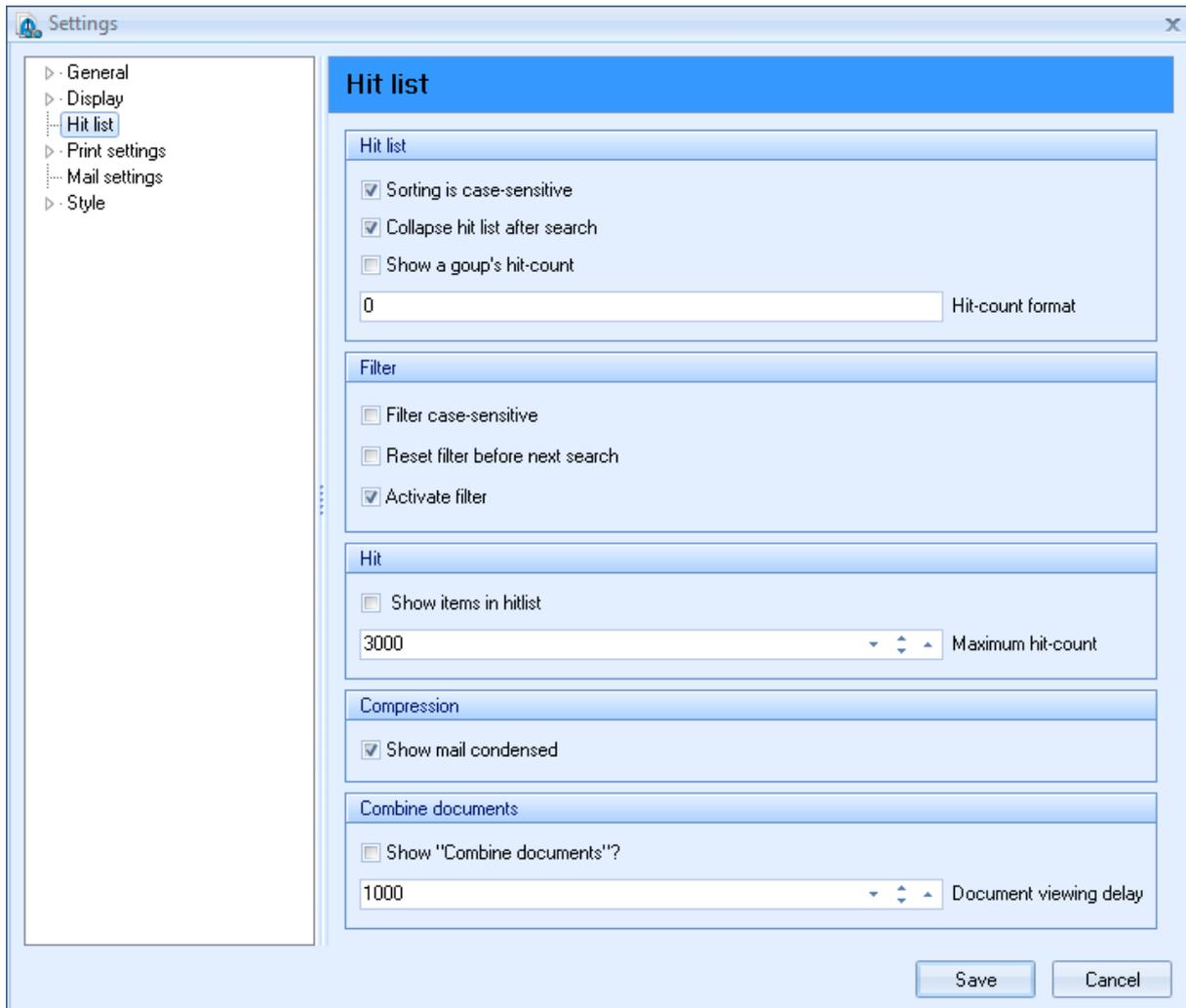
This is where you can define how many pages are to be loaded into the document preview and which can then also be displayed in the document preview using the navigation function. 0 means no limit. It is worth setting limits here if documents with a large number of pages, such as extensive accounting 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.

Hit list - General



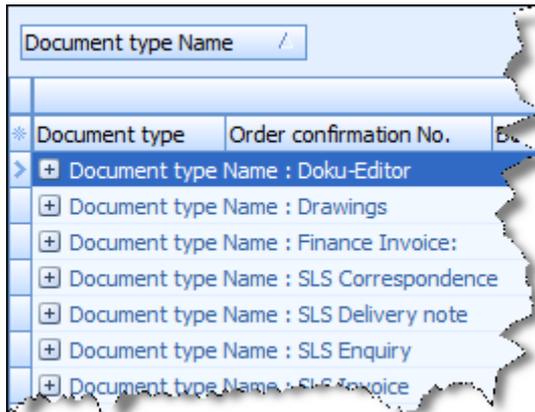
All tabs – Action group – Extras button – Settings menu item

General

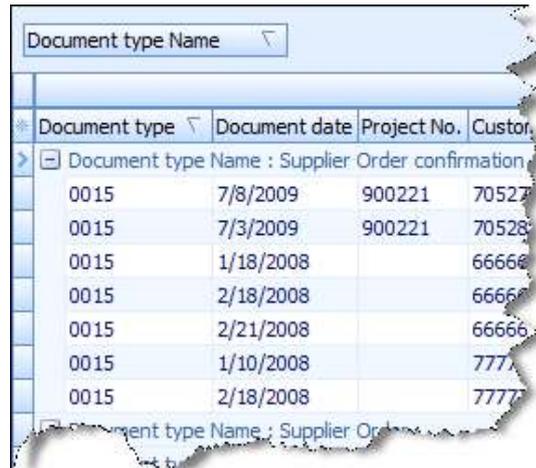
- Case-sensitive sorting
If this function is not activated (checked), the sorting procedure does not take into account if the field contents are upper or lower case.

II. Retrieval
Export functions

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



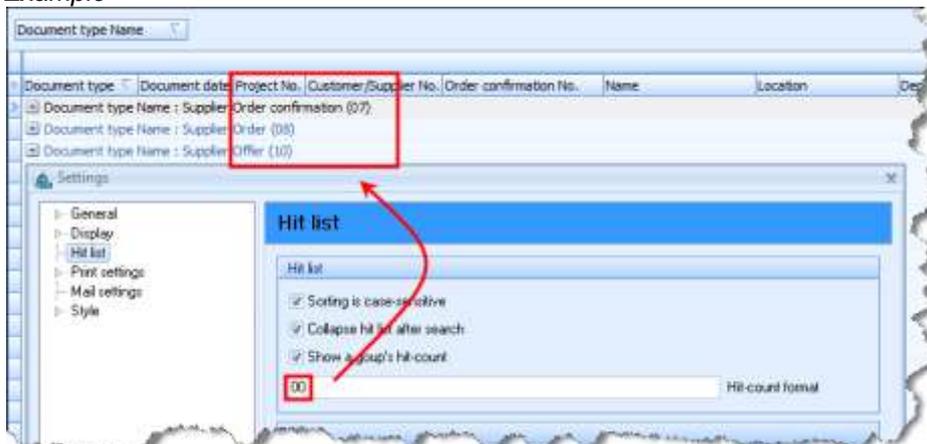
minimized View



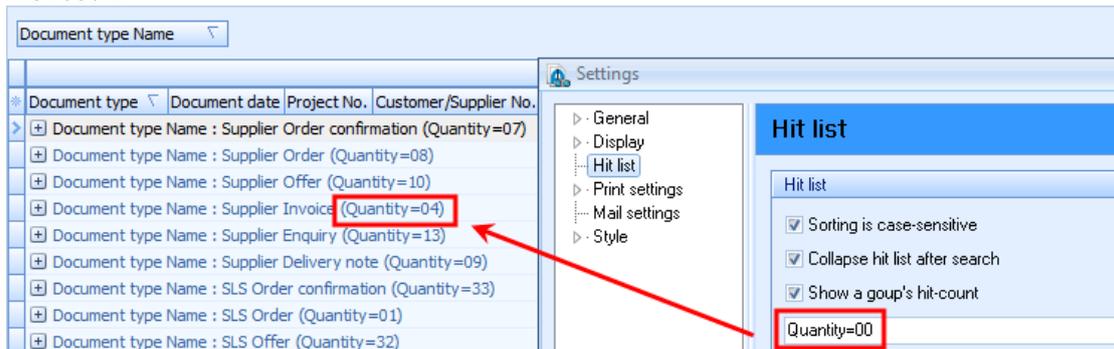
expanded View

- 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).

Example



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



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.
- Reset filter for new search
If this function remains activated, the filter stays active even when a new search will be executed, so that the results may be limited.
- Activate filter
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

- Show items in the hit list
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.

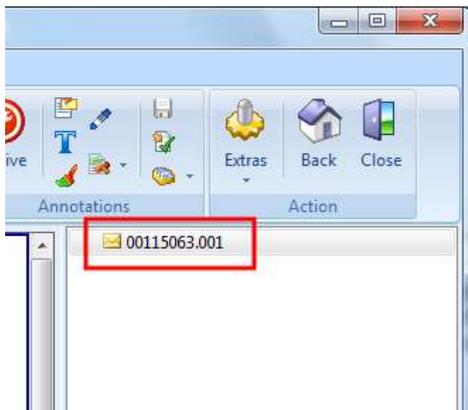
Compression

- 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.)



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-V	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
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

- Show combined documents
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.

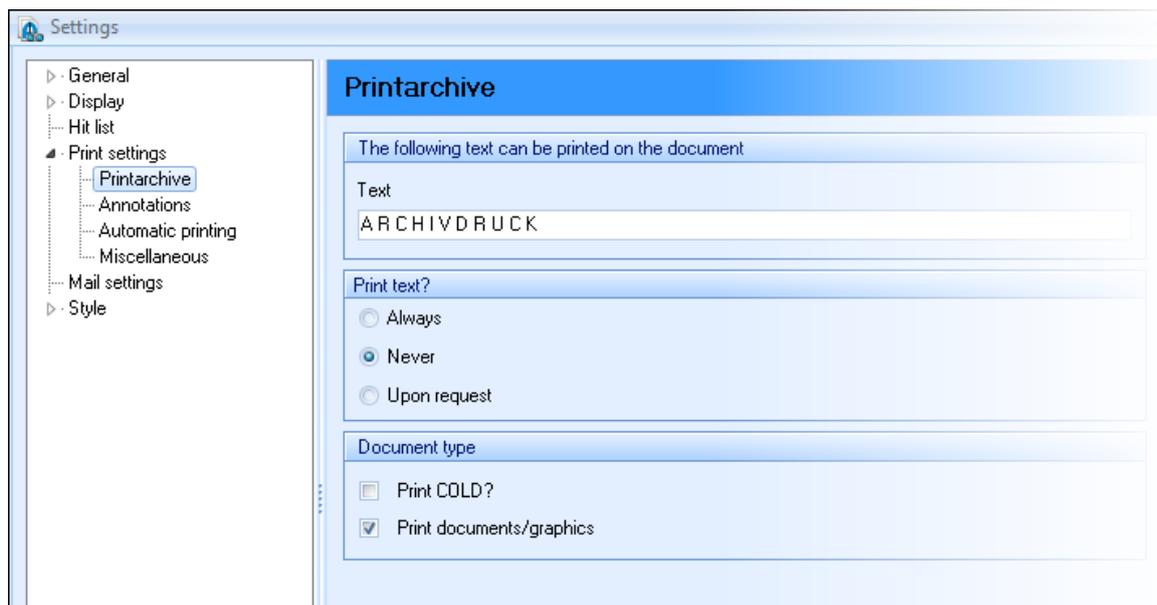
Print settings



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

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

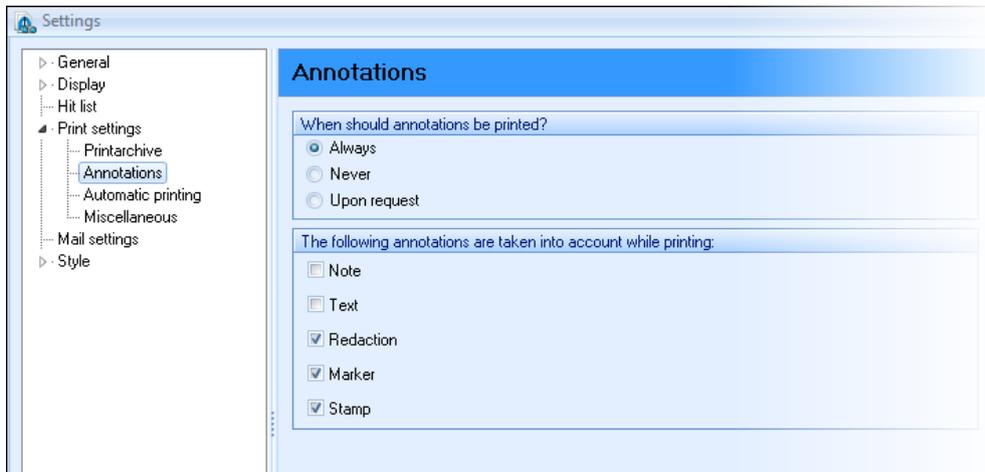
Print settings – Archive print



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.

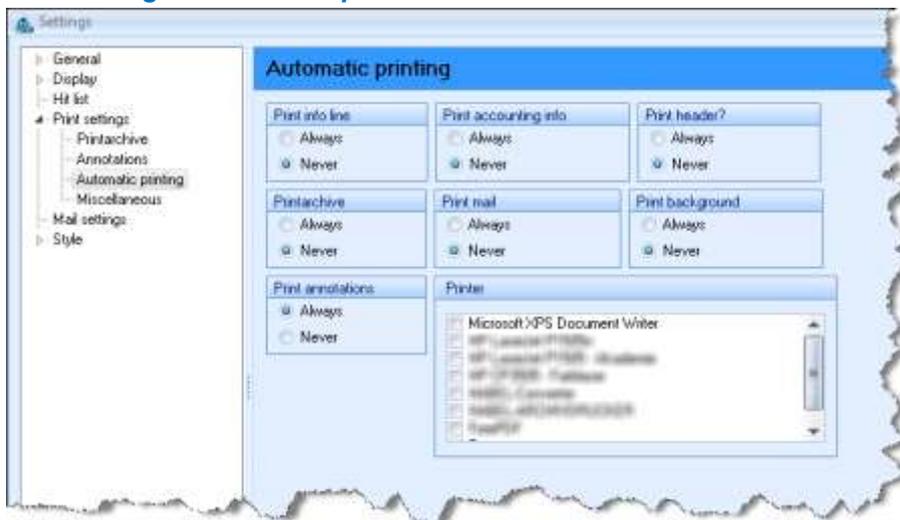
Print settings – Annotations



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.

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*.

Print settings - Miscellaneous



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

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.

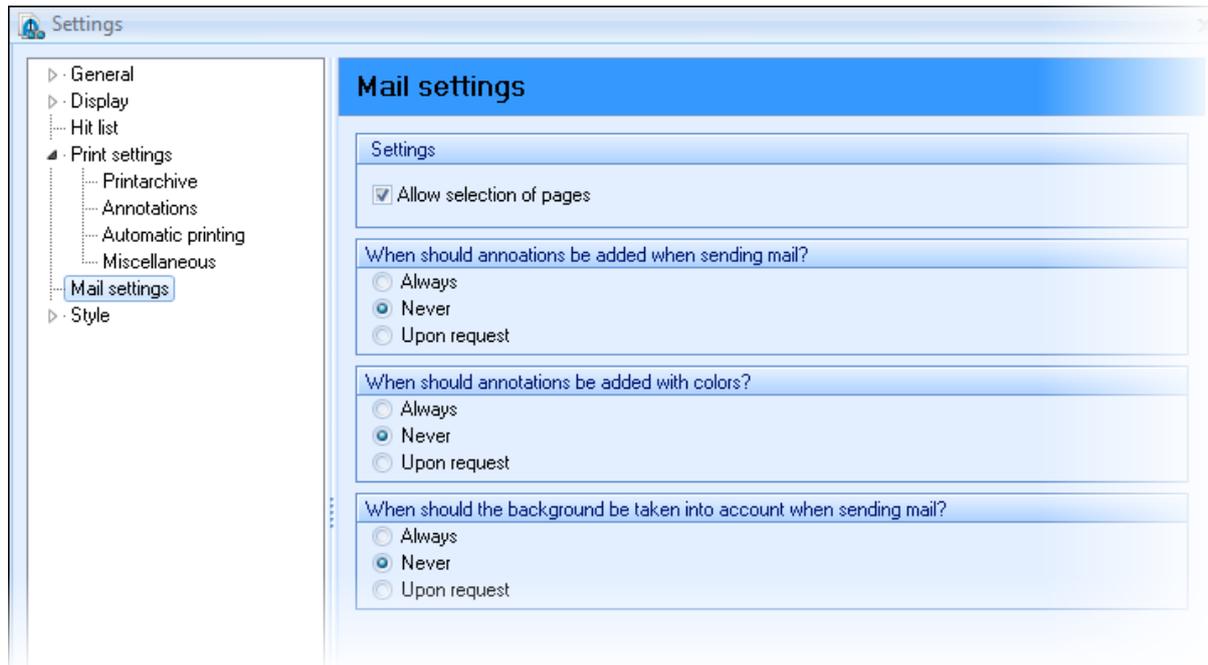
If your document has been provided with account information via the extra module **HABEL ACCOUNT ASSIGNMENT STAMP** you can determine in the *Print account assignment information* whether this account information is to be printed (always, never, on request). Detailed information on the **HABEL ACCOUNT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

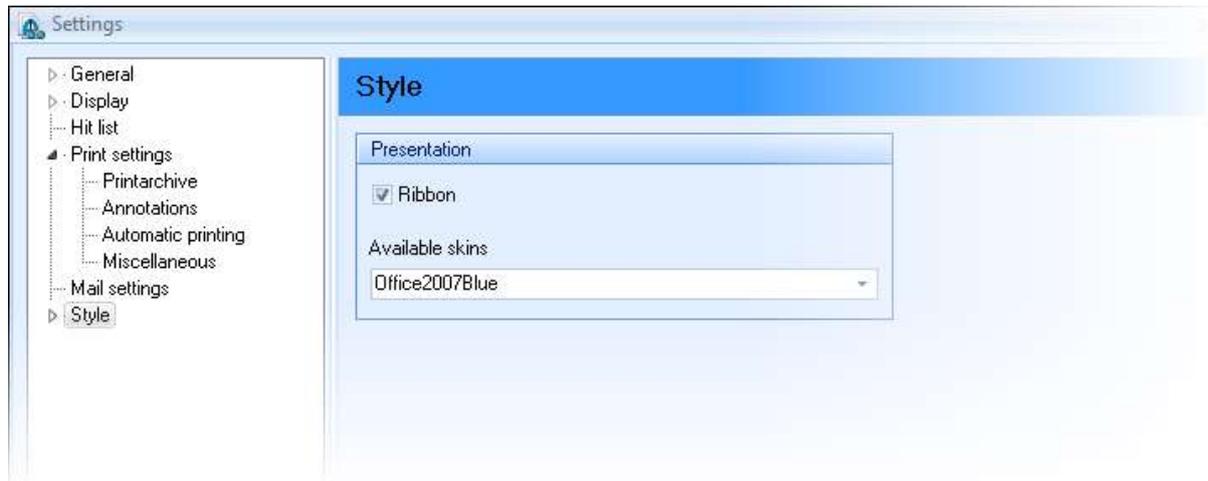
Email settings



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).

Style



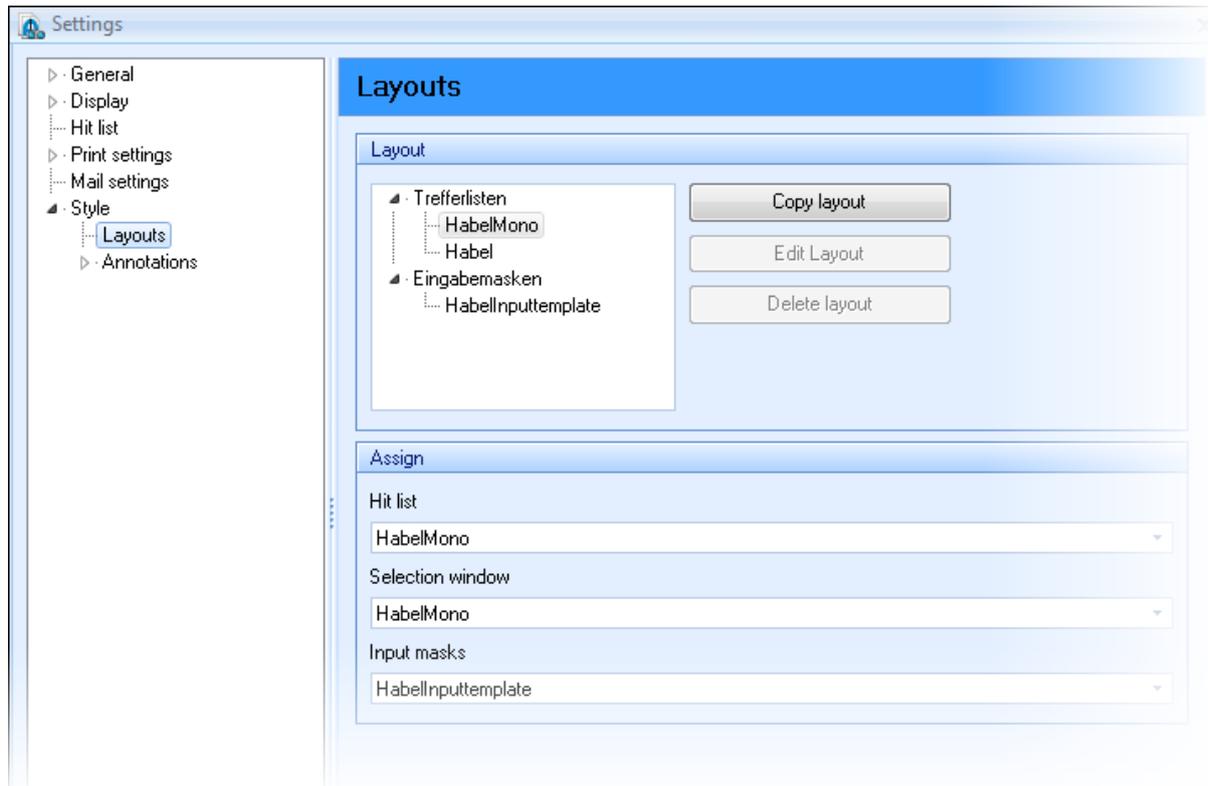
- Multi-function bar (Ribbon)

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.

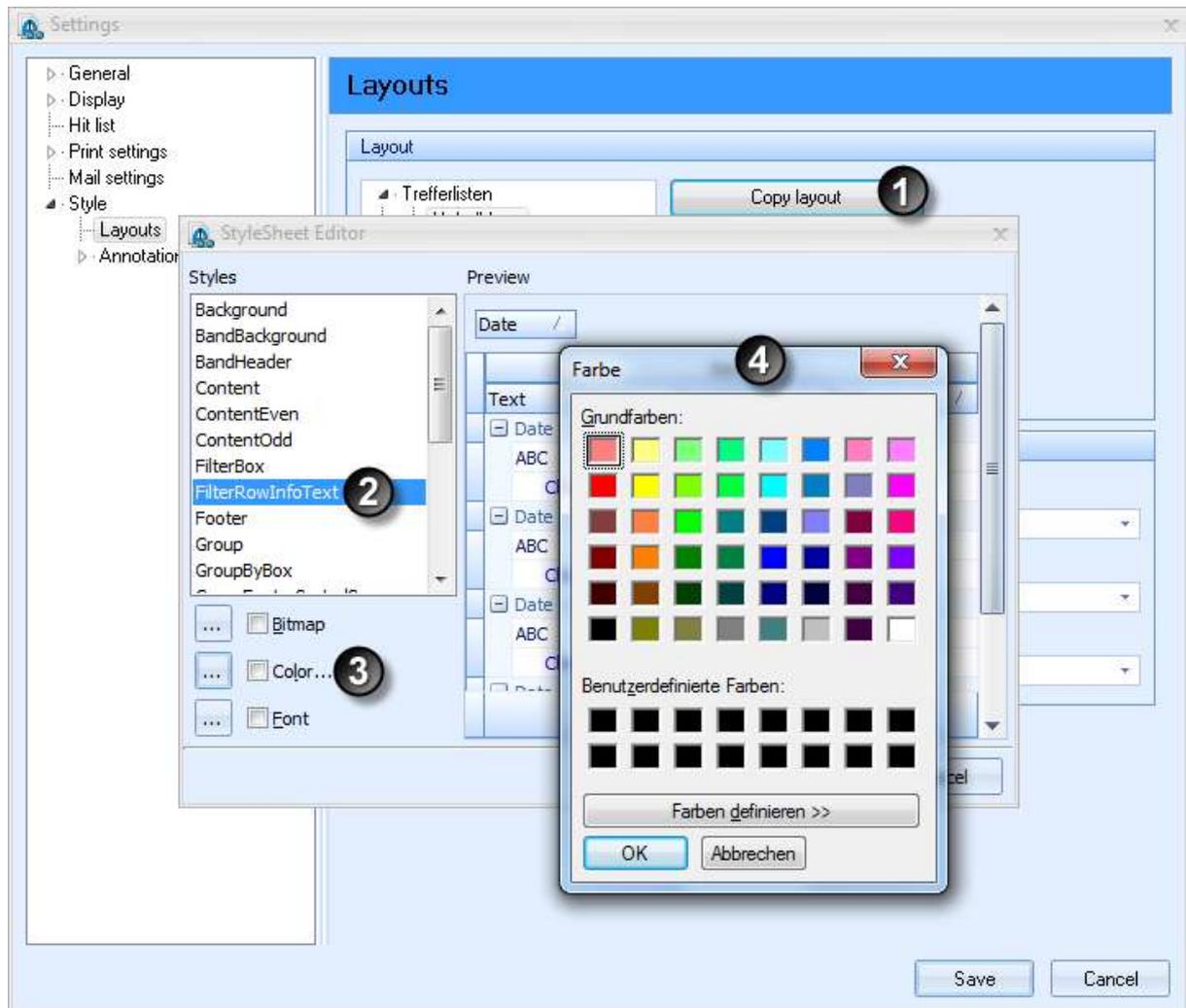
Style – Layouts



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

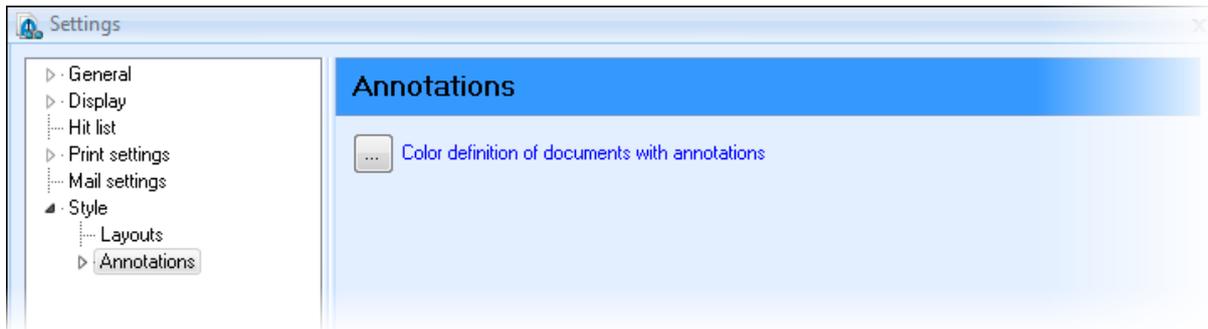
This is where the layouts for the graphic representation of the hit list are defined and are available for editing. Here you can make settings concerning colors, fonts and font sizes of all components of the masks. For this you can choose the Layout and work on it by pressing *edit layout*.

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.



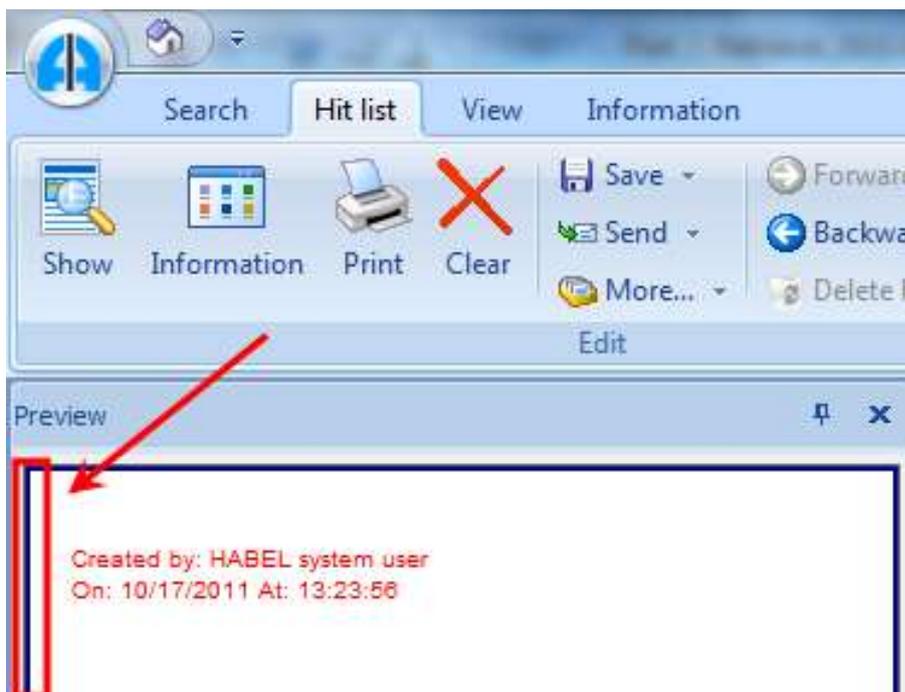
To create a new layout, you have to copy an existing layout **(1)**. Afterwards you have to choose the respective fields, backgrounds, etc. Over Bitmap (providing of images), Color (providing of colours **(3+4)**) and Font (providing of fonts) you can define the layouts. You receive a preview of your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

Style – Annotations – General

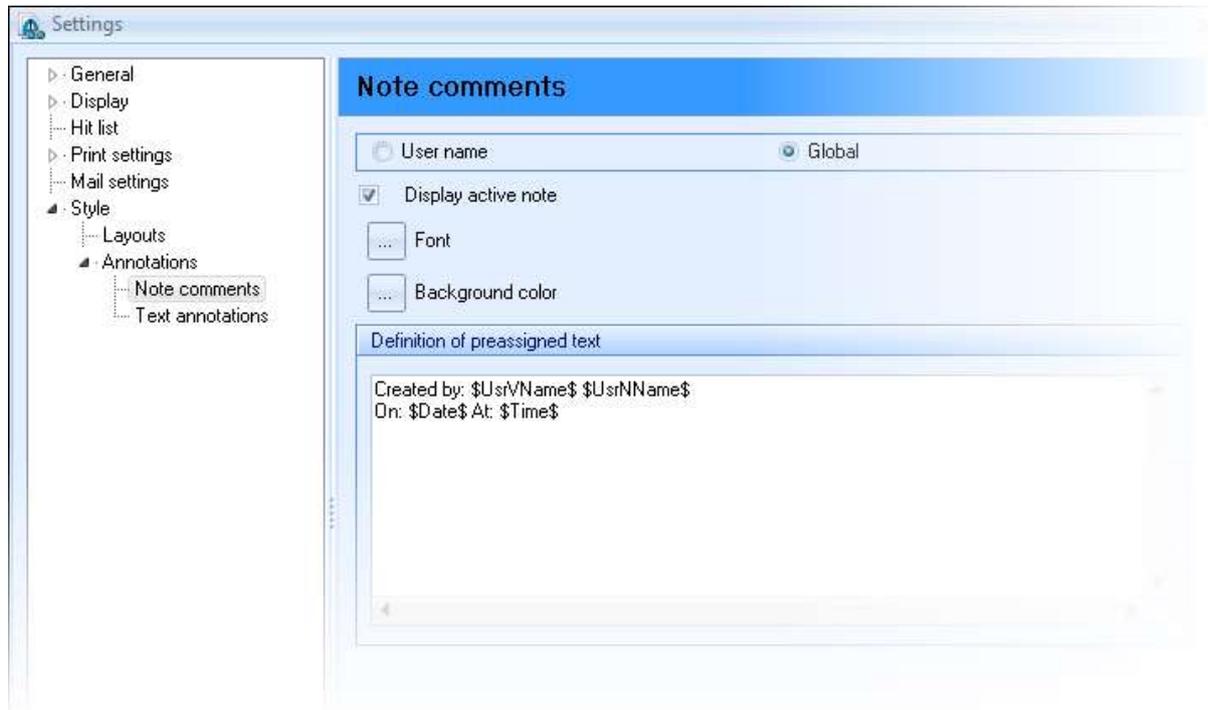


All tabs – Action group – Extras button – Settings menu item

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



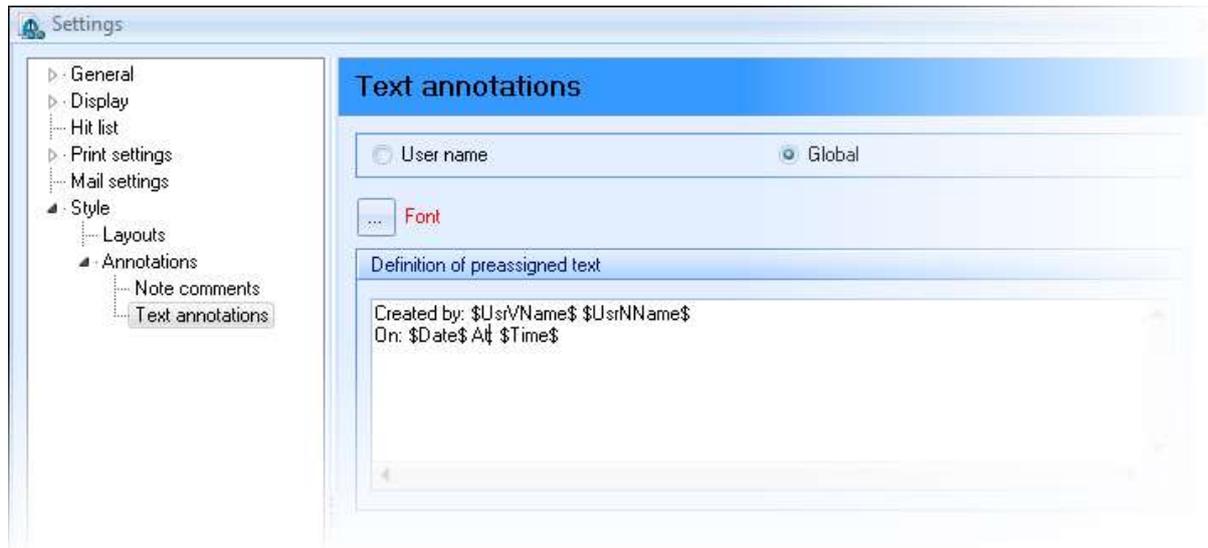
Style – Annotations – Notes



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*.

Style – Annotations – Text



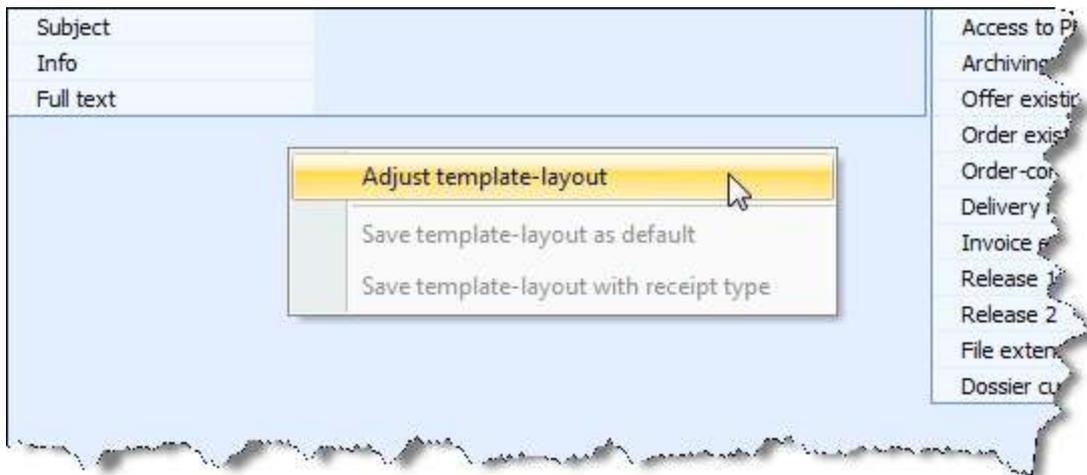
All tabs – Action group – Extras button – Settings menu item

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

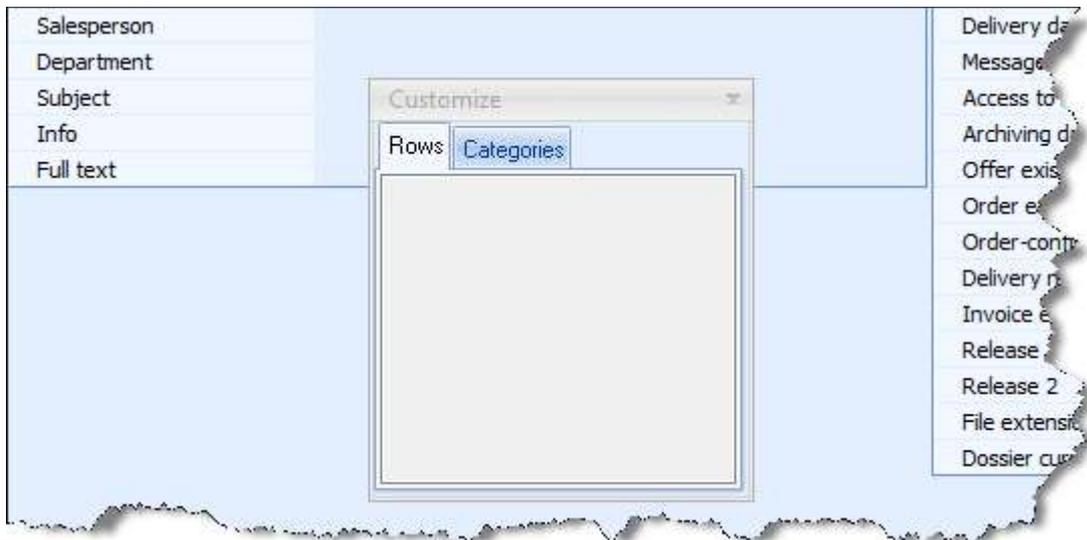
2. Adapt input mask

(only active within Search and Information)

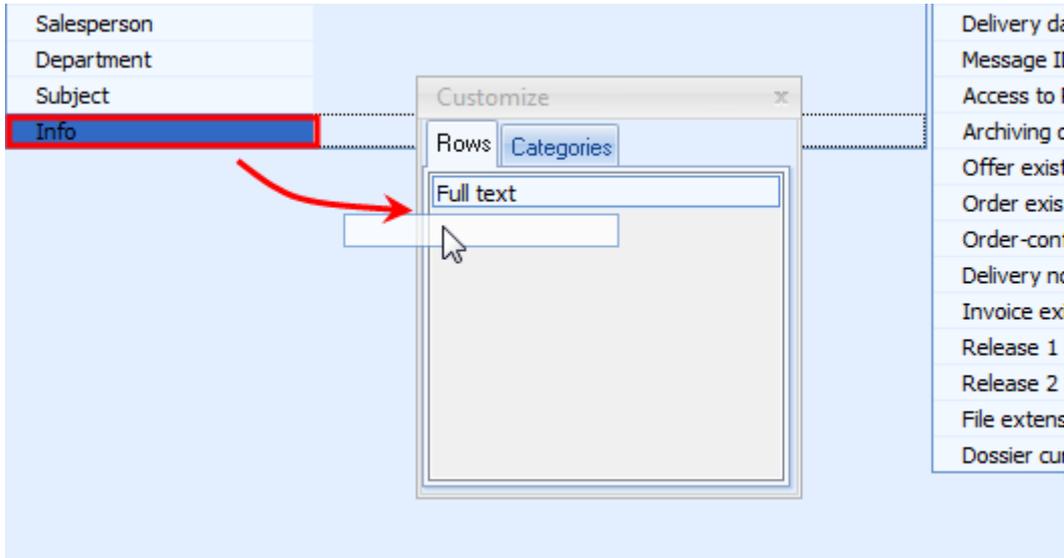
Using the context menu it is possible to change the layout of the mask, that means you can fade in and out fields individually, because you (don't) need them for using.



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



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

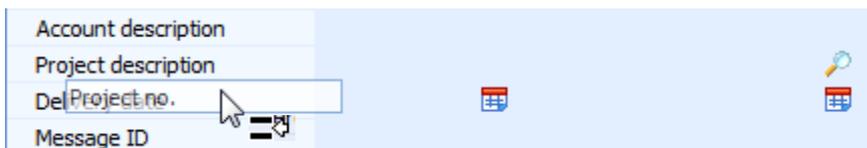


Likewise, it can be pulled back into the mask. With the same method database fields can be moved from one place to another and this way individualize the mask for the user.

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).



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).





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.

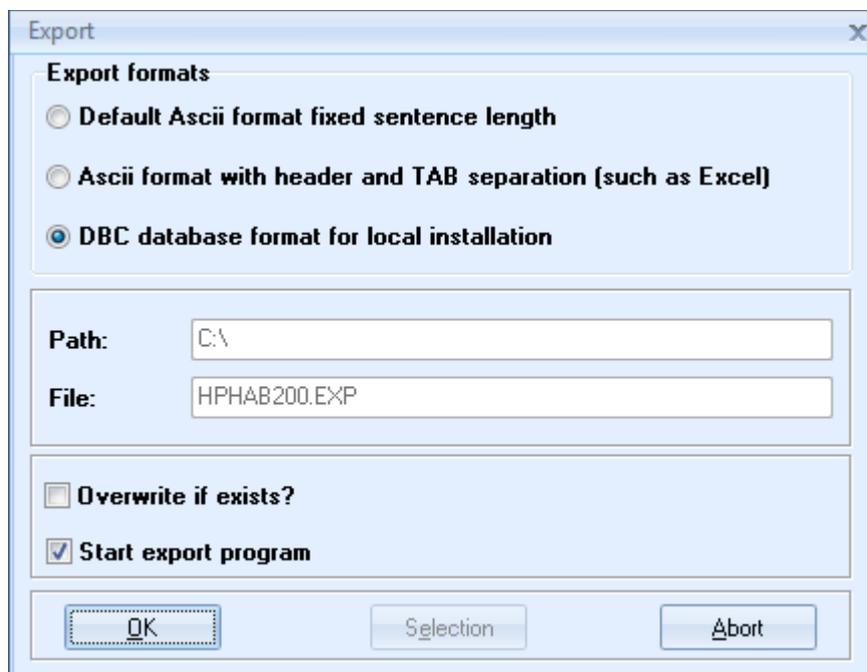


Export functions

General

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.



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.

As necessary choose another path using the selection button, to save the data, and start the export process with OK.

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

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

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

Result:

	A	B	C	D	E	F	G	H	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	
7	115014	0	1	7		1		33			09.05.2008	
8	115015	0	1	2		1		19			29.05.2008	
9	115016	0	1	2		1		5		800253	29.05.2008	
10	115024	0	1	2		1		33			29.05.2008	

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?".

The screenshot shows the 'Export' dialog box with the following details:

- Export formats:**
 - Default Ascii format fixed sentence length
 - Ascii format with header and TAB separation (such as Excel)
 - DBC database format for local installation (highlighted with a red box)
- Path:** C:\
- File:** HPHAB200.EXP
- Overwrite if exists?
- Start export program (marked with a circled '1')
- Buttons:** OK, 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.

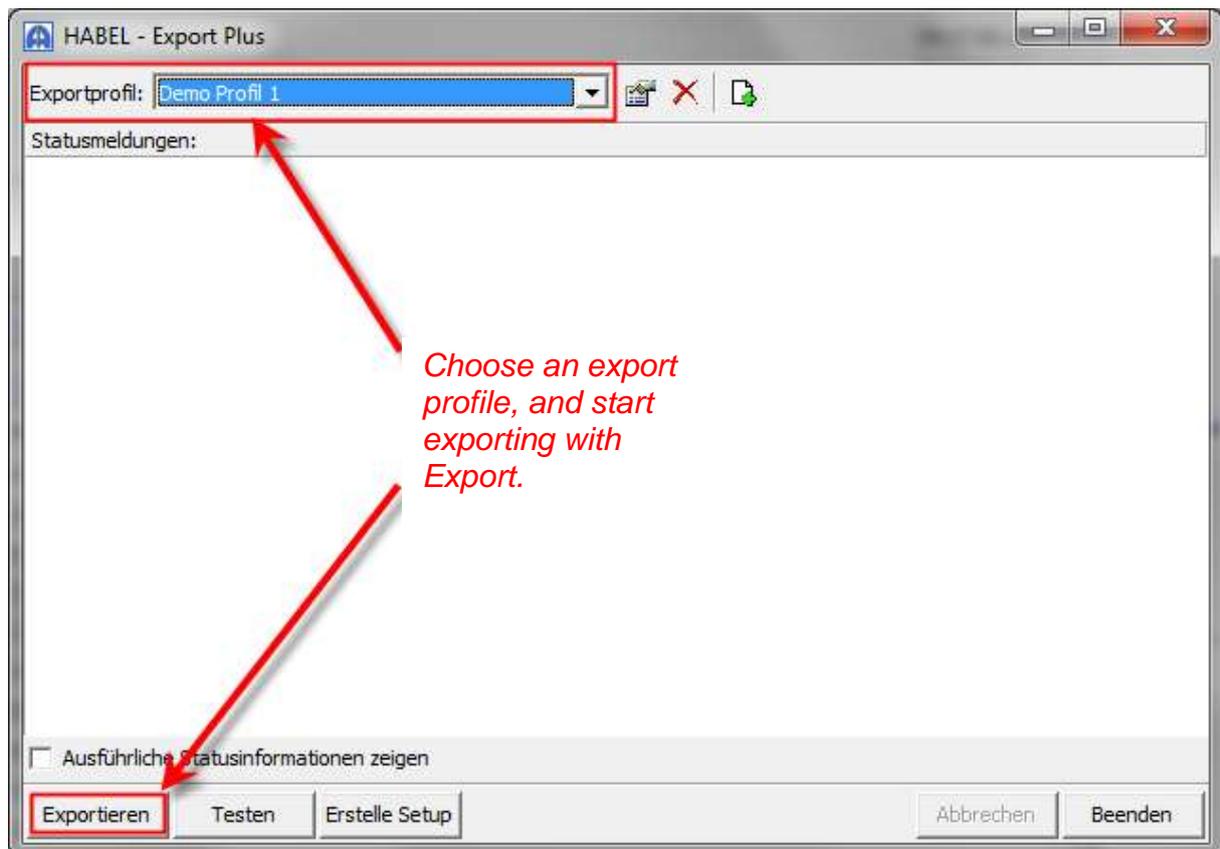


Menu for compiling the local archive; it becomes active on starting the export program. The data to be exported are copied from the source and saved in the destination. If the existing archive is to be overwritten this function has to be ticked. You have the option of activating "Do not delete documents", 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.

Using export profiles

With the **HABEL_EXPORT** module, you can store profiles for the export that can then always be re-used 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.



Edit the profile



Delete the profile

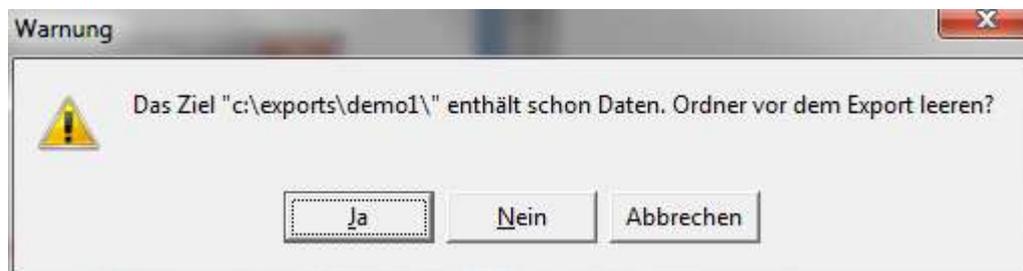


New profile

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



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.



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.

HABEL-WEB

HABEL WEB 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: Passwort:

[Kennwort ändern] [Neues Konto]

WebRecherche Suchmaske - Windows Internet Explorer

http://www.habel-archiv.de/habelweb/EXEC/111109C2201CAF4EB440C58E3

Recherche Allgemein Trefferliste verdichten Suchen Leeren Logout

Firma: HABEL GmbH Artikelnummer:

Belegart: Alle Belegarten Artikelbezeichnung:

Belegnummer: Seriennummer:

Belegdatum: Betrag:

Angebot Nr.: Betreff:

Bestell Nr.: Info:

Fremdbelegnummer: Message ID:

Service-Bericht Nr.: Zugriff Postkorb:

Vertrags Nr.: Erfassungsdatum:

Auftrags Nr.(intern):

Reparatur Nr.:

RMA Nr.:

Produktparte:

Hersteller:

Ku/Li-Nr.:

Name:

Ku/Li-Kurzbeschr.:

EMail:

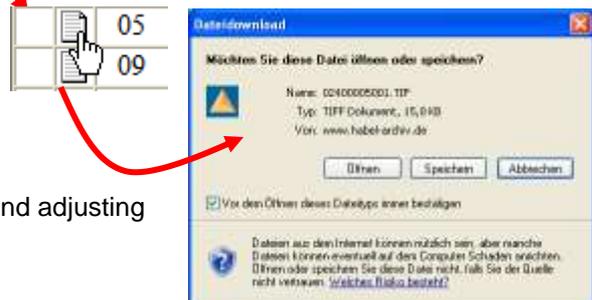
Ort:

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

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

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	401490	13.03.2002	26159	Interconnect AG	80668 München	
02	100206	23.05.2003	26160	informatica ag	50937 Köln	
05	225615	27.05.2003	26160	informatica ag	50937 Köln	
09	401495	05.06.2003	26160	informatica ag	50937 Köln	
12	50020	28.06.2003	70528	Bergmann Software Ring	78056 Villingen-Schwenningen	
14	600205	02.07.2003	70528	Bergmann Software Ring	78056 Villingen-Schwenningen	
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	70528	Bergmann Software Ring	78056 Villingen-Schwenningen	
19	9539	11.07.2003	70528	Bergmann Software Ring	78056 Villingen-Schwenningen	
01	9543	22.05.2003	26160	informatica ag	50937 Köln	
04	9546	26.05.2003	26160	informatica ag	50937 Köln	100
07	300503	29.05.2003	26160	informatica ag	50937 Köln	
07	300504	29.05.2003	26160	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

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.

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.