

# User Manual

## III. Post basket

## Overview

The content of the user manual is directed specifically at users who archive, locate 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-NOTE plus</u>	Indication that the function described here constitutes an additional module that may possibly not be included in the scope of the system.
	(Warning) Notes or information to be followed are marked with this sign.
	Background information and tips are marked with this sign.

## Deviations

The screenshots may differ in detail from your HABEL<sup>®</sup> 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.

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

HABEL Dokumentenmanagement GmbH  
Swiss branch  
Rheinstrasse 36  
CH-8212 Neuhausen am Rheinfall  
Telephone: +41 (0) 52 / 6 74 81 – 51  
Fax: +41 (0) 52 / 6 74 81 – 50  
www.habel.ch

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### III. HABEL-POST BASKET

#### **General**

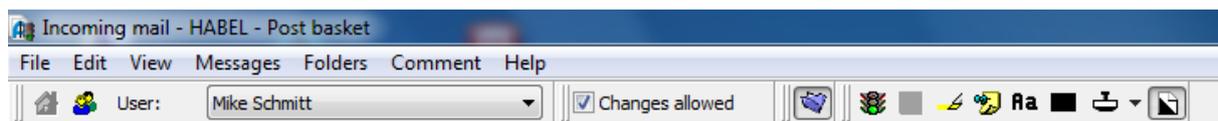
The post basket is used to electronically distribute and process incoming documents. The document is no longer carried from desk to desk, but archived and in the archiving process forwarded to the electronic mailbox of the person responsible for dealing with it.

The post basket improves transparency within the company, as the processing status of the document and the people currently dealing with it are visible at all times. Distributing documents electronically also dispenses with the time and effort involved in delivering mail throughout the company and copying and posting it to branch offices. The documents to be processed are at the right destination in the shortest possible time, allowing better use to be made of deadlines for discounts, for example, and also enabling parallel processing. The documents are simultaneously available in tamper-proof (read-only) format in your electronic archive. In case of absence (due to illness, vacation) procedures come into effect that can be customized and therefore also allow third party access to documents to be processed. This is only a small selection of the benefits offered to you by the post basket.

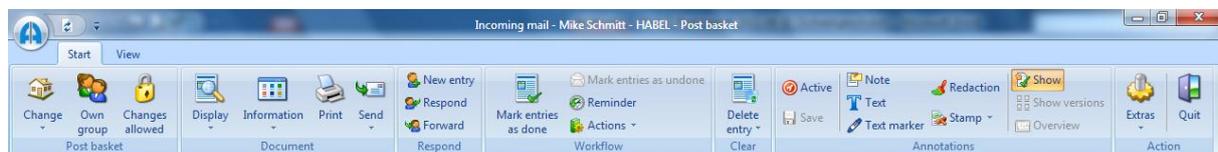
Generally, the entry in the post basket is only a link to the retrieval (search and find) function. The dossier (or "thread") is displayed in the retrieval. Equally, changes in the post basket immediately affect the entries in the retrieval.

#### **1. 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)

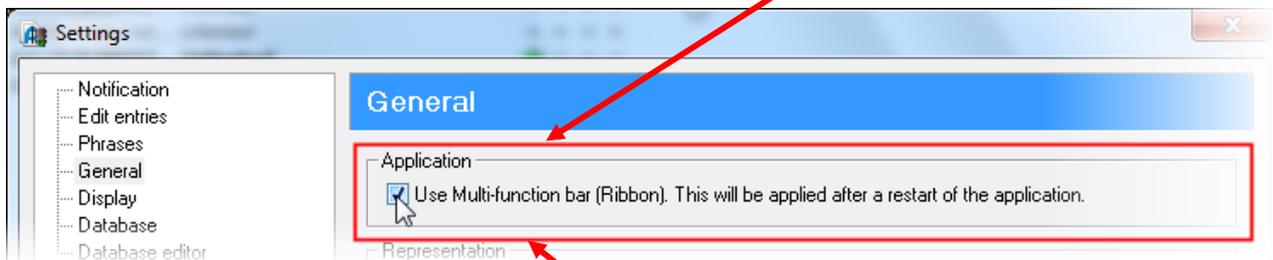
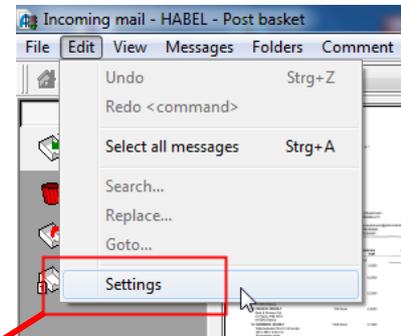
In the user manual employs the ribbon as standard for representing functions. An overview table is provided in the appendix for the placement of menus and commands in the menu/toolbar version.



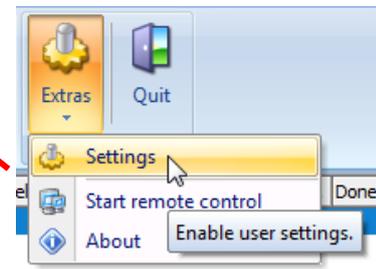
The advantage of the ribbon is that it is context-sensitive (i.e. the active commands are those that can currently be used). In addition, the important commands are immediately accessible by clicking on them.

In the post basket settings you have the possibility to choose, which type of view you want to use. You can reach the settings menu over Edit, Settings.

For activating the multi-function bar (Ribbon) tick Multi-function bar in the register General and close the post basket. With the next start of the post basket it will be displayed with the multi-function bar.



Using the Ribbon surface, you can find the command to change into the Menu / Function bar version within all tabs – Activity – Extras.



## 2. Using hot keys

Within the ribbon surface commands can also be issued via hot keys:

After pushing the ALT-key, letters will be displayed within the tabs. Using them you can open the tabs and afterwards the command.

Some functions are also selectable with key combinations CTRL + key or function key (F1, F1, etc.)

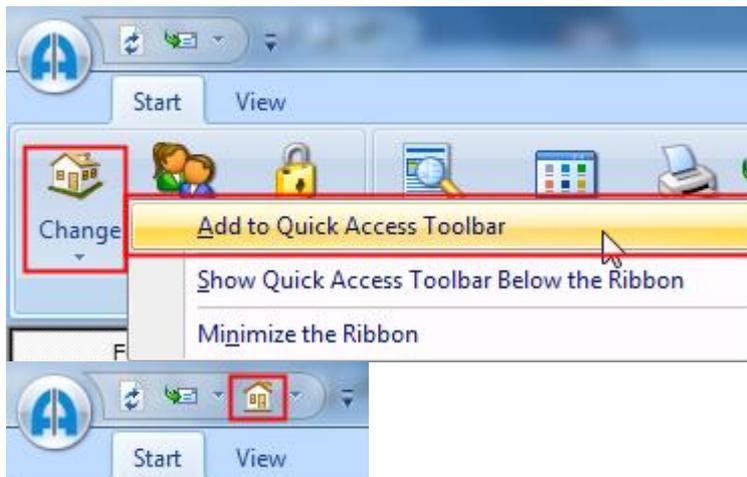


By the way:

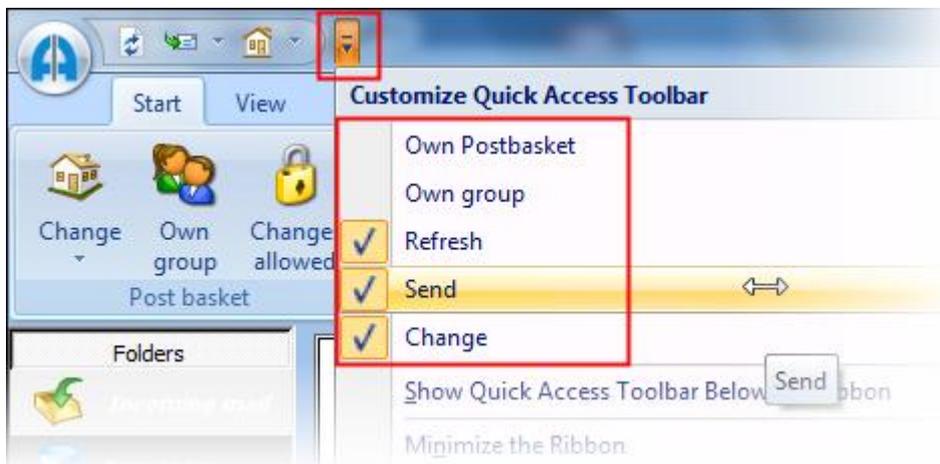
You can also add functions to the Quick Launch.

For this click with the right mouse button on the respective Function and choose the command "Add to Quick Launch".

The symbol appears in the Quick Launch for the direct access.



Alternatively some functions, which can be added to the Quick Launch, are available in the pick list.



## Create post basket entry

There are three options for placing a file in a user's post basket

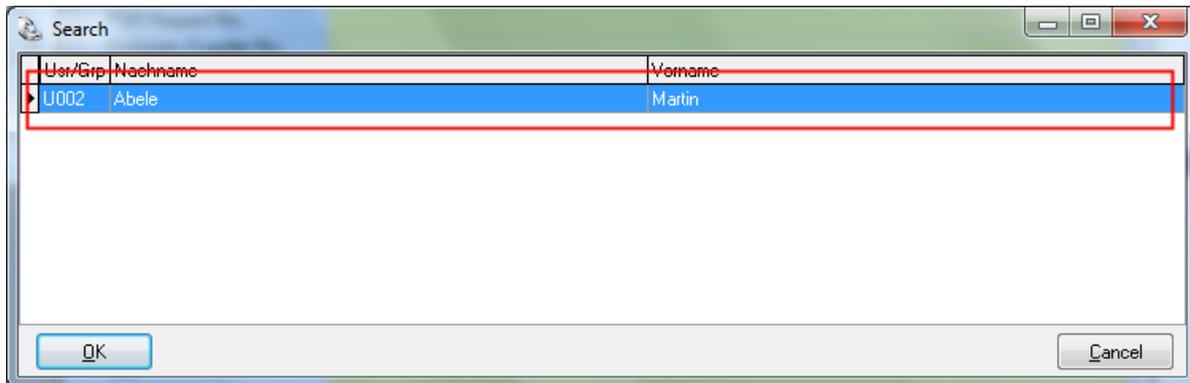
- 1) Select the post basket recipient in the capturing programs
- 2) Create new post basket entry from the retrieval
- 3) Predefined workflow with specific rules
- 4) COLD process
- 5) There are various possibilities, like e.g. the start of a workflow, when a database field content is changed. Just ask your person in charge.

### 1. Selecting the post basket recipient in the capturing programs

The post basket recipient can be selected manually within the capturing program (generally Scan). Several database fields are provided for this purpose:

#### PB recipient 1 and PB recipient 2

The recipient is accessed directly by entering the name or part of the name. If there are several hits to choose from these are shown in a selection box. Groups can also be entered as recipient (1). A group is a pool of recipients to which various members are assigned. Note: The documents are posted to the group post basket, not to the individual post baskets of all members



*PB deadline 1 and PB deadline 2*

This field is where you can specify a processing deadline for the recipient. If the field is left blank it is assumed that there is no deadline. (2)

*PB information 1 and PB information 2*

The recipient can be provided with brief information in this field. Generally a selection box is provided containing information frequently. (3)

PB recipient 1:	U002	Abele, Martin
Erledigen bis 1:	08/14/2011	1
PB message 1:	Create order	2
PB recipient 2:		
Erledigen bis 2:		
PB message 2:		
Outlook ID:		

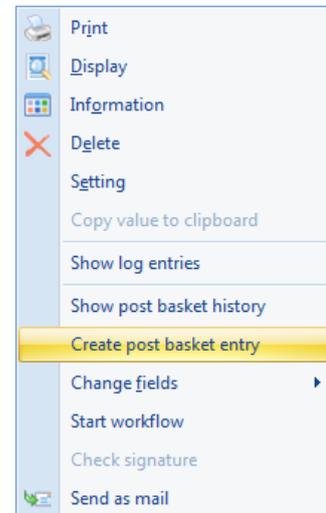
After the capturing process has been completed and the document has been transferred to the archive, the entry appears in the post basket of the selected recipient or group. At this point the document itself has already been archived.

## 2. Creating a new post basket entry from HABEL RETRIEVAL

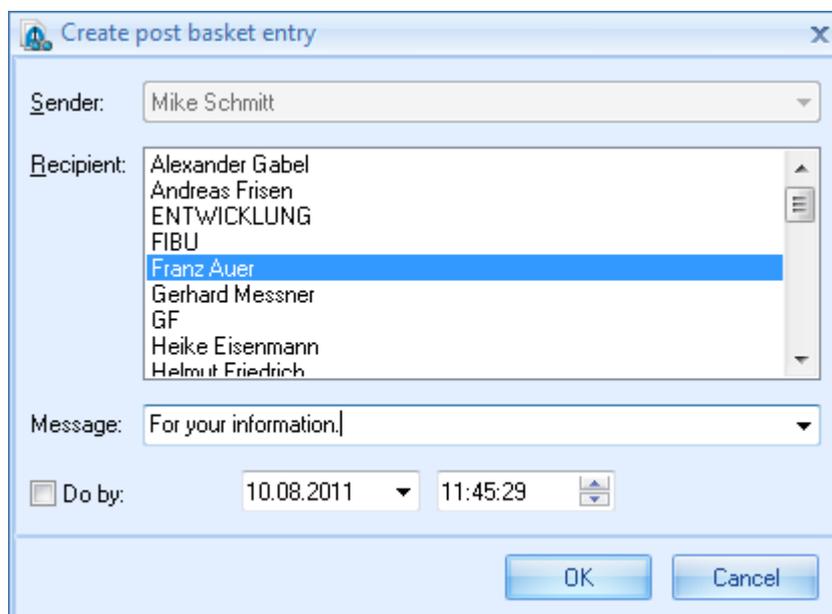
It may be necessary to forward documents already archived to HABEL users for information or processing purposes. If **HABEL EMAIL Dispatch** is used to send the document to other co-workers the subsequent processing of the document cannot be tracked. However, if it is forwarded using post basket a log is kept of all actions undertaken with the document and can easily be retrieved.

Search for the file in the usual way using the retrieval. Using the pop-up menu, right-click on the hit and select the command "Create post basket entry".

**This command is also accessible via the menu option File – Create post basket entry.**



Selecting the command takes you to a selection box via which you can select the recipient and determine information and deadline (tick the field "To be completed by"). Immediately afterwards the file is available in the post basket of the selected recipient or group. If you hold down the CTRL button when selecting the recipient you can select several recipients at once.

The 'Create post basket entry' dialog box is shown. It has a title bar with a close button. The 'Sender' field is set to 'Mike Schmitt'. The 'Recipient' field is a list box containing: Alexander Gabel, Andreas Frisen, ENTWICKLUNG, FIBU, Franz Auer (highlighted), Gerhard Messner, GF, Heike Eisenmann, and Helmut Friedrich. The 'Message' field is set to 'For your information.'. There is a 'Do by' checkbox, which is unchecked, followed by a date field set to '10.08.2011' and a time field set to '11:45:29'. At the bottom are 'OK' and 'Cancel' buttons.

### 3. Predefined workflow with specific rules

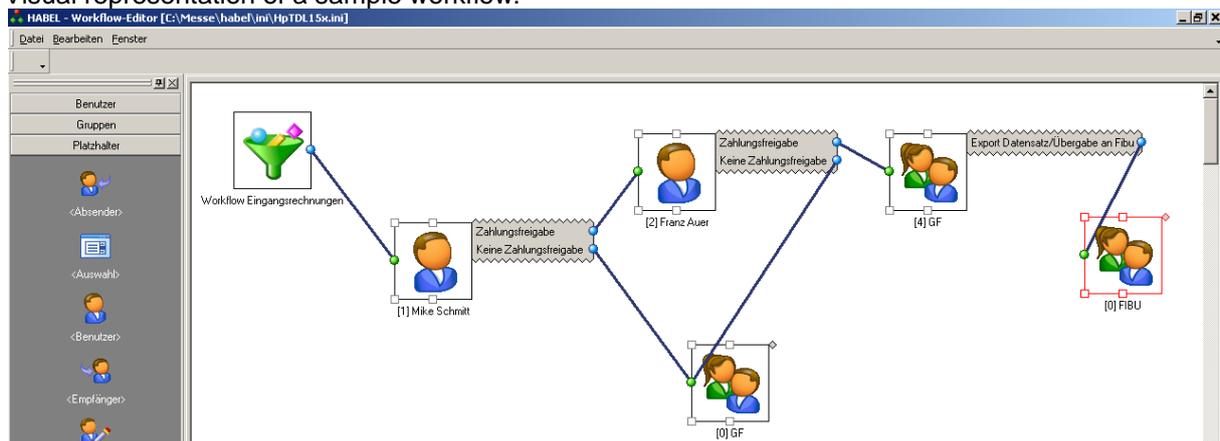
A workflow is a process that operates on the basis of specific criteria. Any database field can be exploited (including in combination with one another) to start a workflow. For example: specific document type, specific document type and name, specific zip code etc.

Application e.g. incoming invoice workflow:

All incoming invoices are passed to Mrs. Smith from Purchasing, as well as to the Managing Director and the Accounts Department. The system is configured such that the defined recipient automatically receives a post basket entry for this type of document, without having to select the recipient manually. The recipient can then use a menu entry to forward the document plus information to the accounts department, for example.

The icon  shows that an entry has been made via a workflow.

Visual representation of a sample workflow:

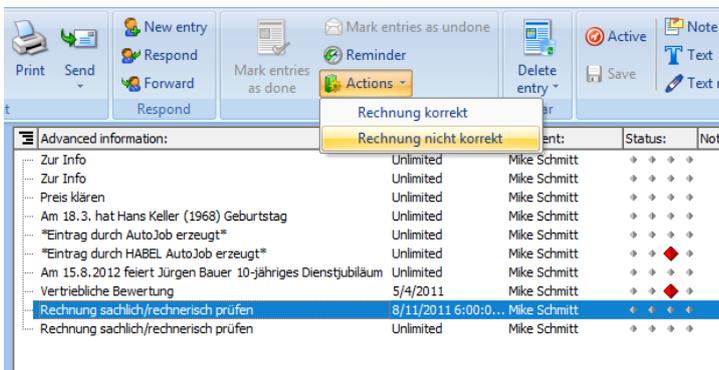


Workflows are compiled individually and can be adapted by the administrator using the **HABEL WORKFLOW Designer** module. The use of this program is described in User Manual IV. Administration.

### Release – Not released

The configuration of workflows is highly customer-specific and often very complex. You will receive instruction in the workflows defined at your company from your project management consultant. Here is a practical example based on the release of documents:

To accelerate the processing of a document within a workflow the functions “release” and/or “not released” can be added to the menu.



If you are in agreement with the content of a document (e.g. if the incoming invoice is correct) you select the command “release”. The next instance in the workflow (in this example the accounts department) will receive an entry with the information “released”.

If you decline the release of the payment (i.e. if you select “not released”) you have to specify a reason. The next instance receives the entry along with the information you have entered as reason for refusal.

If the workflow has reached the end of the chain, the hand icon is brighter and symbolizes the end of the workflow. The payment can then no longer be released or declined. The dossier can then only be set to “done”.

Other icons appear in the course of the workflow. An overview of them is provided on page 37.

#### **4. Post basket entry from a COLD process.**

Documents archived in HABEL directly from external applications such as ERP programs can be forwarded to defined post basket recipients using defined criteria (e.g. document type).

## ***Post basket entries in the retrieval***

### **1. Displaying post basket entries in the retrieval**

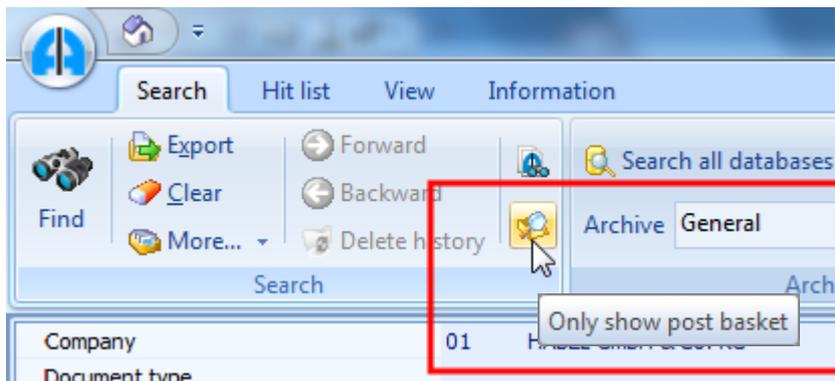
All dossiers that are also available as post basket entries are color highlighted in the retrieval. Moving the mouse over the entry will bring up the name of the post basket in which the entry is still pending.

If an entry is marked as “done” by all post basket owners who have received it, the color highlighting disappears.

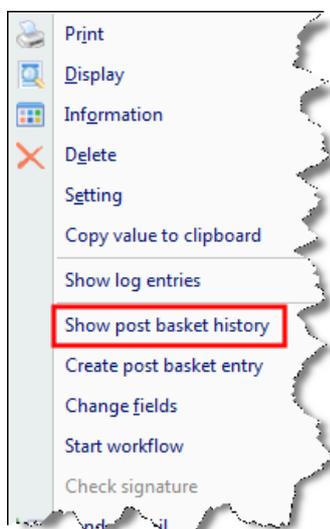
Name Document type	Order No.	Customer	Name	Location	Department
SLS Enquiry	225615	26160	informatica ag	Köln	Verkauf/Sales
SLS Enquiry		26160	informatica ag	Köln	Verkauf/Sales
SLS Offer	225612	23317	Interconnect AG	München	Verkauf/Sales

Mike Schmitt

It is possible to search specifically for post basket entries that have been activated in the search function via the menu option File – Settings – Display only post basket entries.



### **2. Displaying post basket entries in the retrieval**



In the retrieval you can display the route taken by the document via the post basket history. Access to the post basket history is via a pop-up menu (right-click on hit list entry). You will receive an overview of all forwarding, new entries, replies, payment releases and status notes.

Clipboard history

## History for Document type: 0019, document number: 9590

### Post basket history

From Mike Schmitt at 07/23/2003 at 10:40 AM.

Sent to Gerhard Messner. Completed on 07/24/2003 at 10:41 AM.

Message: Eingangsrechnung prüfen.

- Forward from Gerhard Messner to Kurt Gerth at 07/24/2003 at 10:41 AM.  
Message: Eingangsrechnung prüfen.  
Completed on 07/27/2003 at 1:13 PM.
  - New entry from Kurt Gerth to Karl Langert at 07/26/2003 at 10:42 AM.  
Message: Ist die Rechnung i.O.?  
Completed on 07/27/2003 at 1:11 PM.
    - New entry from Karl Langert to Kurt Gerth at 07/27/2003 at 1:11 PM.  
Message: Ware ist in Ordnung. Rechnun kann bezhalt werden.  
Completed on 07/27/2003 at 1:13 PM.
      - **New entry from Kurt Gerth to Irene Merk at 07/27/2003 at 1:13 PM.**  
Message: Zahlungsfreigabe  
*Overdue since 07/29/2003 at 5:00 PM.*

Clearance was granted for these entries.

Back Next Print Close

## Working with the post basket

The post basket is used to electronically distribute and process documents. It is a tool for sending information with the document to various recipients while keeping a record of the route taken by the document. There is no need for the copying and passing on necessitated by hard copies. There is an icon on your user interface for accessing the post basket. If this icon is not available consult your administrator.



### 1. Structure of the post basket mask

On opening your HABEL POST BASKET you will get an overview of all messages sent to you.

The screenshot shows the HABEL Post Basket interface with four numbered callouts:

- 1**: Points to the menu bar at the top.
- 2**: Points to the folder selection pane on the left.
- 3**: Points to the document preview area in the center.
- 4**: Points to the hit list table on the right.

Advanced information:	ToDo until:	Recipient:	Status:	Customer/Supp
Info	Unlimited	Mike Schmitt	→ → →	66666
Info	Unlimited	Mike Schmitt	→ → →	77777
Preis klären	Unlimited	Mike Schmitt	→ → →	
Am 18.3. hat Hans Keller (1968) Geburtstag	Unlimited	Mike Schmitt	→ → →	
*Eintrag durch AutoJob erzeugt*	Unlimited	Mike Schmitt	→ → →	26160
*Eintrag durch AutoJob erzeugt*	Unlimited	Mike Schmitt	→ → →	23317
Am 15.8.2012 feiert Jürgen Bauer 10-jähriges Dienstjubiläum	Unlimited	Mike Schmitt	→ → →	
Vertreberliche Bewertung	5/4/2011	Mike Schmitt	← → →	26160
Rechnung sachlich/rechnerisch prüfen	8/11/2011 6:00:00 PM	Mike Schmitt	→ → →	00001
Rechnung sachlich/rechnerisch prüfen	Unlimited	Mike Schmitt	→ → →	70528

<b>1</b>	Menu bar
<b>2</b>	Folder selection
<b>3</b>	Document preview (can also appear below, above or to the right of the hit list)
<b>4</b>	Hit list with the dossiers sent to this HABEL POST BASKET

## 2. Menu bar in the post basket

### Register „Start“



### (1) Tab post basket



#### Switch

Under the command Switch all post baskets of the other post basket user and the group post baskets are listed. Group post baskets could e.g. be the purchase department, the sales, the management, etc. The members of these groups have access to their group post basket and can carry entries over to their own post basket, in case they have got the rights to do this.

Via the drop down menu you can choose the post basket which you want to look in. A requirement is that you have the access right for the particular post basket. The sort sequence in the drop down menu is adjustable. By clicking the button Switch you will arrive in your own post basket again. If there was a new entry in the own post basket, the Home button will change like shown on the right.



#### Own Group



By clicking on this command the monitored group post basket will be opened. (Note: only one group post basket can be monitored. If there is a new entry in the group post basket, the command receives a letter symbol.)

#### Changes allowed

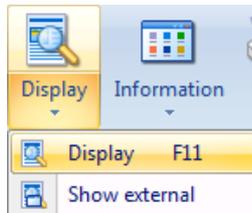


Depending on authorizations assigned it is shown whether you can or may carry out changes in the selected post basket (may have to be done manually).

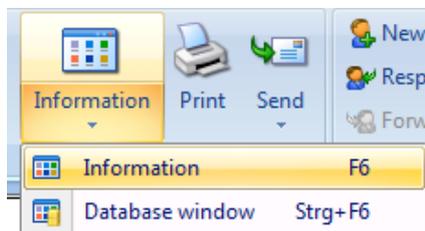


If the lock is open, changes are allowed.  
If the lock is closed, changes are not allowed.

## (2) Tab Document



To display the document use the command display or the key function F11 or a click on the button. The document will be displayed in the full screen mode. By clicking on the button again you will get back to the initial view. With a click on the command display external or a double click on the hit list entry the document will be opened - depending on the document format either in the retrieval or in the corresponding application.

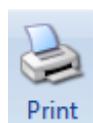


To get into the information mask (display the field contents of the process), you can use the command information, the F6 function key, the button information in the footer or the pop-up menu on the entry. The information screen is displayed instead of the hit list. There you can - if you have got the appropriate rights – enter into the edit mode and change or supplement field contents.

By selecting database window you can decouple the information mask and open and change the field contents of the marked document. Your advantage: You have the hit list and the document preview or the document preview in the full screen mode on your screen and can control or change / complete the database fields with the help of the information, which is standing on the document. With Cancel you will close the decoupled window.

Note: If you have selected in Extras- Settings that the information mode shall be skipped, you will get directly in the edit mode by choosing „Information“.

The information and edit masks will be described more detailed under point 6.

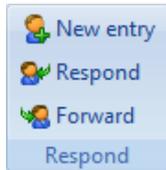


Using the command Print, you can print the document belonging to the entry selected. For this a printer selection will be opened, so that you can choose the desired printer and regulate the page number, etc.

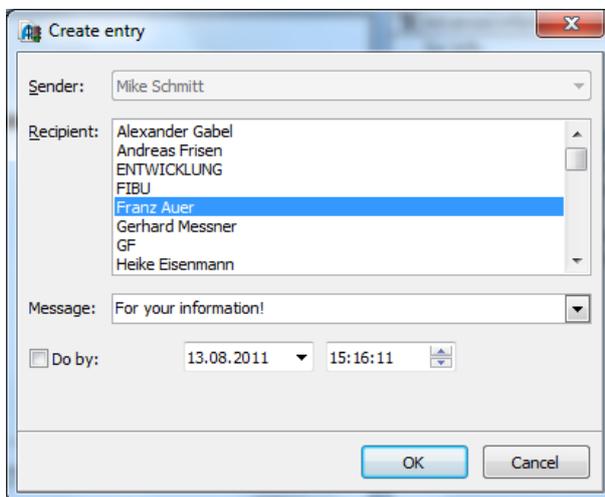


If you are using the HABEL- E-MAIL Shipping and if necessary pdf-licences), you can send selected processed via E-Mail (e.g. to a third, who has no access to the archive.) By choosing this command the e-mail program will be started with the selected thread in the attachment. If you want to send the document as pdf-file, you have to choose the command Send mail as pdf.

### (3) Tab Respond



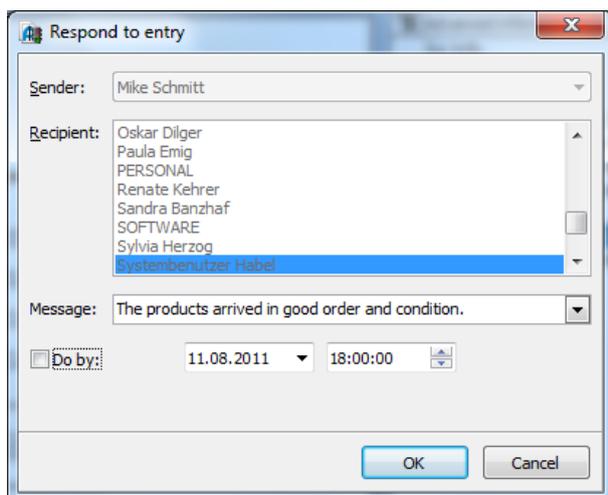
If you want to send an entry in your post basket to another person along with additional information such as queries, order for further processing etc., choose – New entry



You can select one or several recipients in the menu box Create Entry, as well as select messages from the list box or enter your own text. Of course you may also specify a deadline for completion.

The entry stays in your post basket until you delete it. By displaying “Complete Thread” you get a tree view showing the person to whom the document has been sent as a new entry.

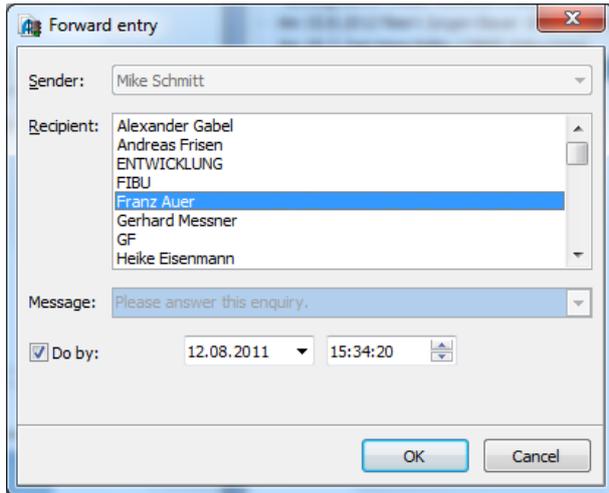
Alternative you can reply to post basket entries if you wish to provide the sender with information. When you have executed the command you will get a selection box “Respond to entry”.



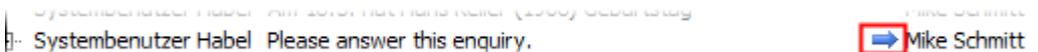
The recipient is already defined and cannot be changed. A list box allows you to select a predefined message or alternatively/additionally you can enter free text into the message field. In this case too you can advise a deadline for completion, by checking “To be done by”. The entry stays in your incoming post unchanged, while the tree structure (complete thread) shows that the thread has undergone a further processing step.

Systembenutzer ...	Please answer this enquiry.	Mike Schmitt	8/12/2011 3:34:20 PM
Mike Schmitt	Heike will do this.	Franz Auer	Unlimited
Mike Schmitt	Please answer this enquiry.	Heike Eisenmann	8/12/2011 3:34:20 PM

Entries to be forwarded with the same message (and without additional information) to other post basket users can be processed using the “Forward” command. The menu box offers you the option of selecting one or several recipients and of advising a new processing deadline.

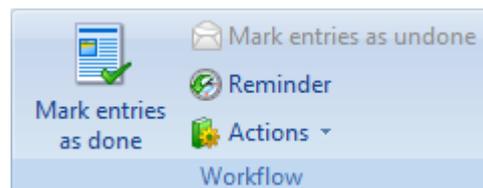


If within the options it has not been configured that forwarded entries will be deleted immediately the file stays in your post inbox. The entry is marked in such a way that the recipient knows that it has been sent via forwarding in the workflow.



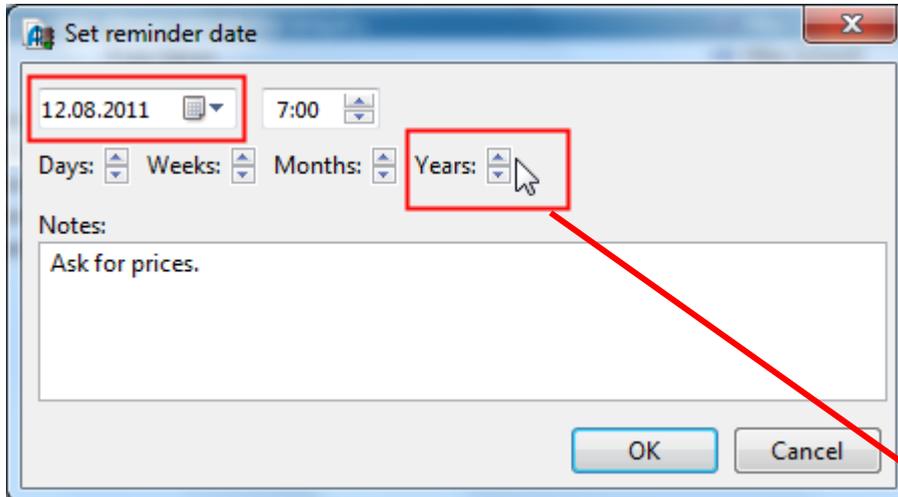
#### (4) Tab Workflow

just for your inform... Unlimited	→ Mike Schmitt (mmi)
*Eintrag durch HA... Unlimited	Systembenutzer H...
*Eintrag durch Aut... Unlimited	Systembenutzer H...



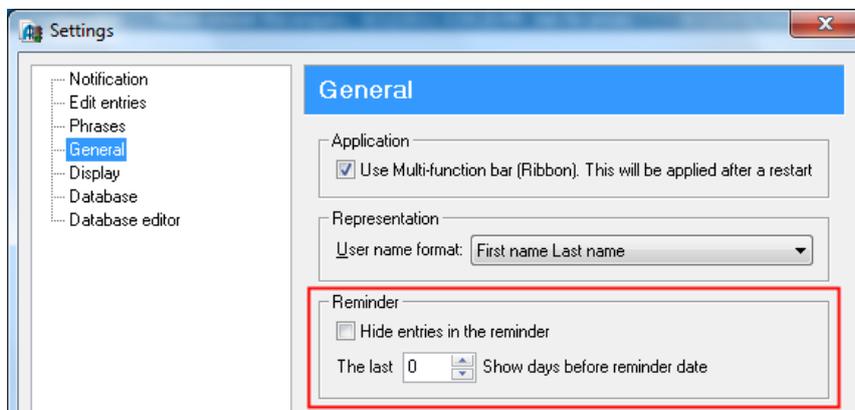
If entries in post basket have been dealt with, you can highlight them accordingly using the menu “mark as done” or the pop-up menu. The entry is only moved to the recycle bin (i.e. deleted) if this has been set in the options or selected. Entries which are marked as done can be reactivated by choosing “mark as undone”.

Entries to be processed at a later date and hidden in the incoming post until this date can be provided with a reminder date. The reminder date is associated with the post basket (not the document) and is seen only by the post basket owner or users who access this post basket.



Sender:	Advanced information:	ToDo until:	Notes:	Reminder Date:	Status:
Systembenutzer ...	Please answer this enquiry.	8/12/2011 3:34:20 PM	Ask for prices.	8/12/2011 7:00:0...	◀ ▶ ◀ ▶

You can enter a specific date when the document should be shown again (access calendar via arrow key next to date field) or set the reminder date in day, week, month and year steps using the arrow keys. In addition you can store notes relating to this thread to act as a memory aid for the reminder.

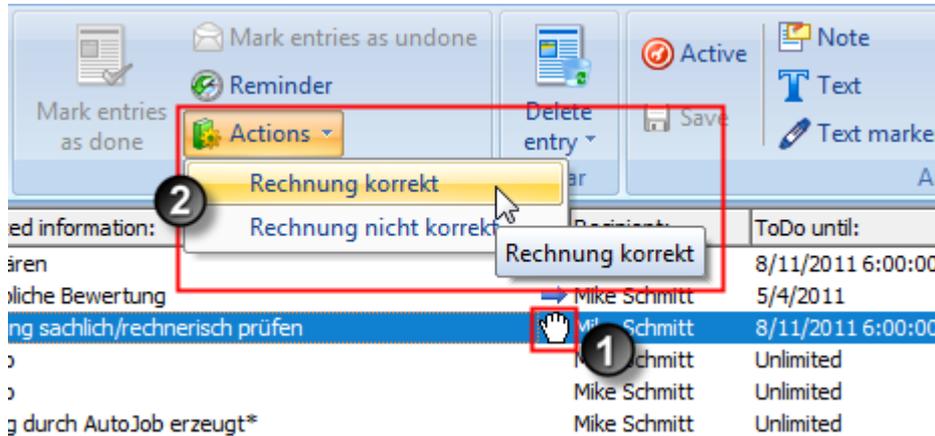


In the settings (Tab – Activity – Extras) within the sub menu you can define how many days before the reminder date the entry is to be shown again.

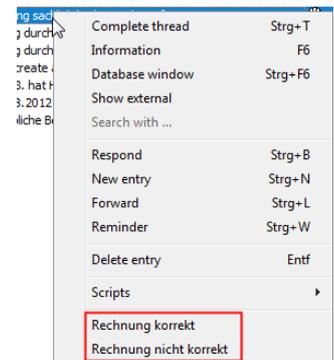


However, at any time you can show those entries currently on hold in your incoming post by using the button display reminder in the tab View - Entries.

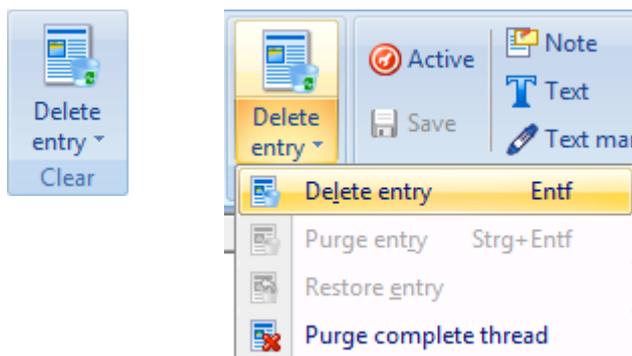
III. HABEL-POST BASKET  
Working with the post basket



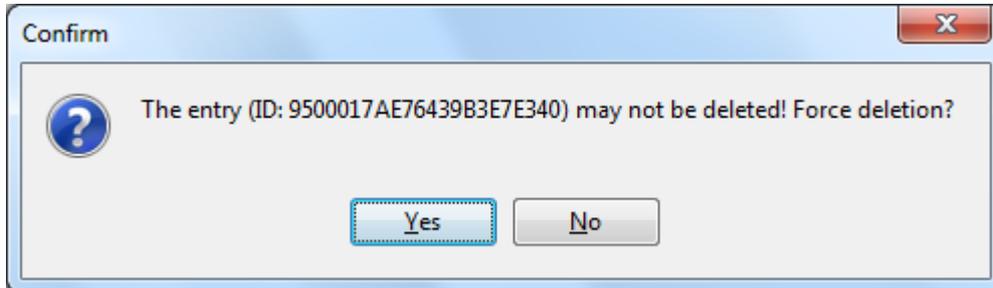
Post basket entries, which have a connection to a workflow, are marked with a hand (1). For this you have within the tab Workflow the command “Activities” (2). Here you can choose how to valuate the thread. Depending on the activity selected the entry will be forwarded (e.g. invoice correct: Information goes to the FINAC or invoice not correct: Information goes to the responsible member of staff). The activities, which are provided here, will be defined customized. You can also reach the activities over the pop-up menu (right-click on the entry).



(5) Tab Clear



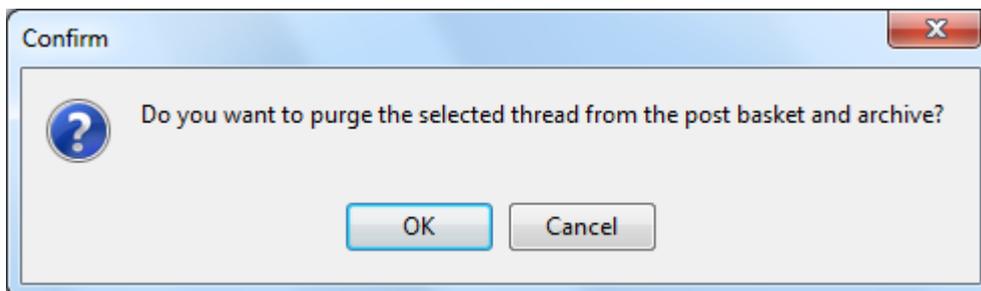
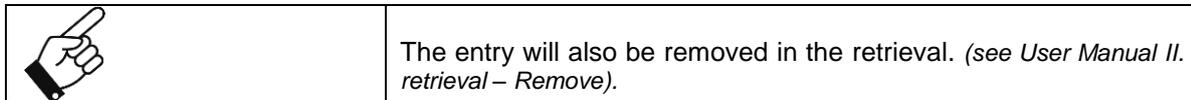
Over menu, DEL-key or pop-up menu you can remove entries out of the post basket. If the thread is in the workflow the user needs to have the right to “delete protected entries”, and will receive the following prompt:



The entries removed from the incoming post will be moved in the recycle bin. Here they can be finally deleted (pop-up menu "Purge entry"). If you want to recycle an entry, you can do with via the command „Recycle entry“ or just pull the entry via drag & drop into the folder incoming post.

The both commands „Delete entry finally“ and „Recycle entry“ are also provided in the pop-up menu (right-click on the entry).

Over the command „Delete document out of the archive“ you can, provided you have the rights to clear documents and the module HABEL-CORRECT, remove documents directly out of the post basket.



**(6) Tab Annotations**



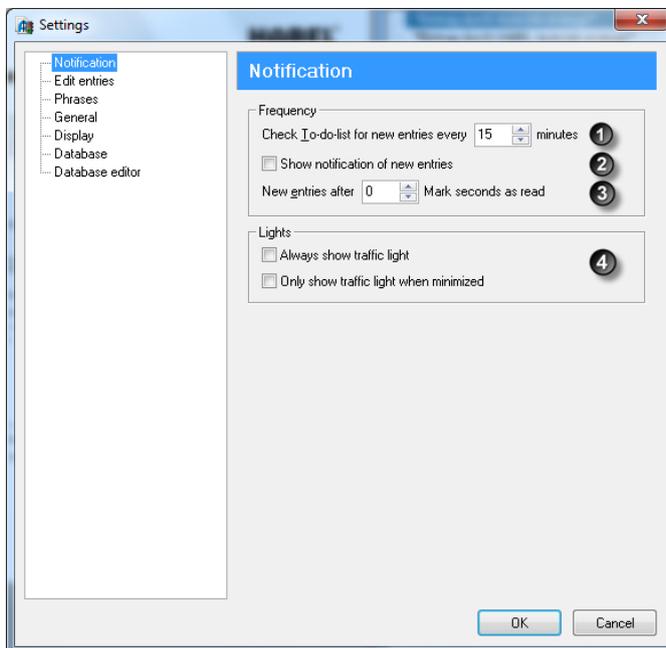
In the post basket it is possible too to affix annotations on the document. For this you have various edit icons, which are only active when you have the right to make changes in the post basket and when you are using the module HABEL-ANNOTATIONS. The functions of this module can also be used in the post basket. The annotations are visible in the retrieval.

①	Active means, that the edit mode is active and the annotations, which are affixed on the document,
②	can be edited. You can see that the edit mode is active when the document preview is framed in red (the color settings are individually changeable). The active mode will also start, when one of the annotation symbols in the register is clicked. If the active mode is turned off over the menu and the changes have not been saved yet, a query will be started, which asks if you want to save the changes or not. Elsewise changes can be saved over the command "Save".
③	With these commands you can affix annotations on the document and also carry out changes in the settings for the annotations. For further details, please see our User manual retrieval – Document display – Affix annotations.
④	You can also show/hide the attached comments for document preview. If the annotations are hidden the blue frame around the document preview indicates that there are comments on the document.
⑤	Overview of who attached which comment to the document and when (version display).
⑥	If an annotation is affixed on one of the entries, you can get to it by using this button. (Show all entries with annotations).

**(7) Tab Action**



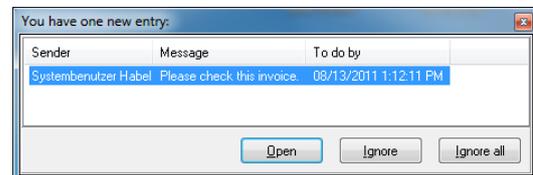
Over the command Extras – Settings different settings can be carried out. After selecting the command “Settings” a further menu will be opened.



Picture 1: Extras – Settings- Notification

In the column frequency you can configure how often the post basket should be checked for new entries and updated. **(1)** Caution: If you specify values that are too low you have to check your network capacity. You can update manually at any time using the F5 key.

The receipt of a new entry can also be displayed **(2)**. If the field is activated a notification appears on receipt of a new entry and via which you can go directly to the dossier in the post basket (open).

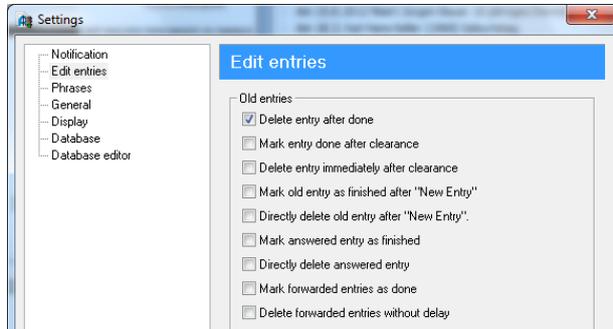


In this menu you can also define the number of seconds after which the new entry should be marked as seen **(3)**. The seconds are counted from the display of the entry.

The post basket icon is the traffic light. This can always be displayed in the status bar of your screen or only whenever the post basket is minimized **(4)**. If the light is red that means that the post basket contains overdue entries, entries due are yellow and new entries green.

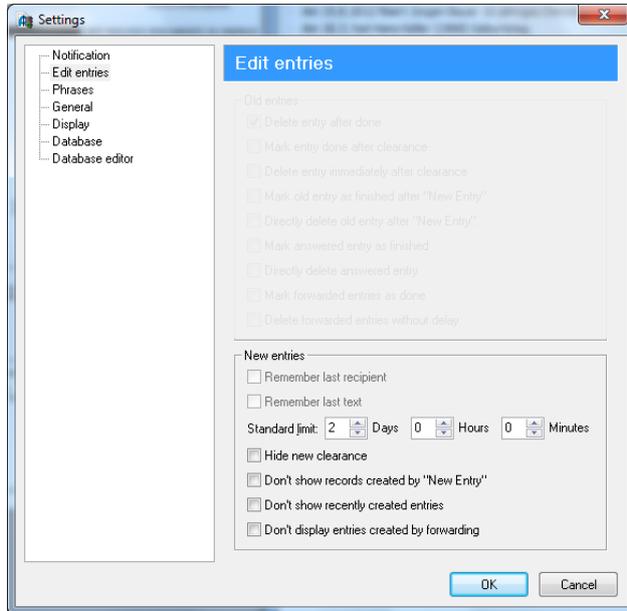


III. HABEL-POST BASKET  
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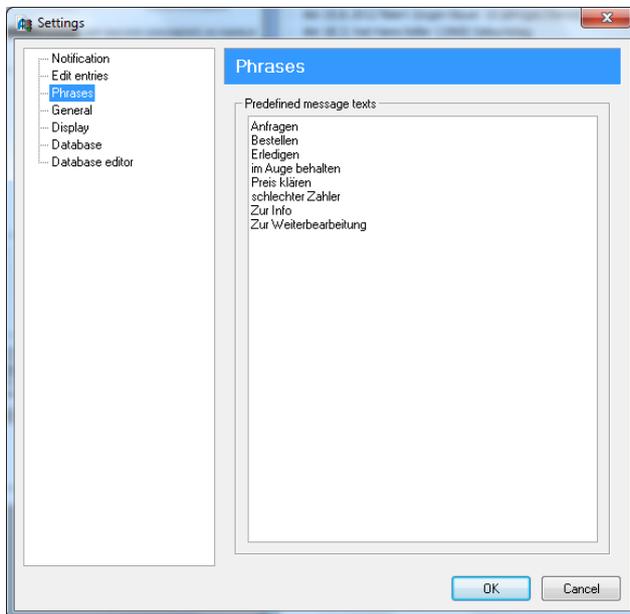
Picture 2: Extras – Settings – Edit entries – Old entries

Delete entries when done	If an entry is marked “done” it is deleted immediately (moved to recycle bin). Otherwise it stays in incoming post marked “done”.
Mark entry done after clearance	If a clearance (release) option has been installed the entry is marked done after clearance.
Delete entry immediately after clearance	If a clearance (release) option has been installed the entry is deleted (moved to recycle bin) after clearance. Note: The document is not deleted in the archive.
Mark former entry done after "New entry"	If a new entry was created out of an existing entry, it remains unchanged in the incoming post. If this function is activated, the former entry will be marked as done, but still remains in the incoming post.
Delete former entry immediately after "New entry"	If a new entry was created out of an existing entry, it remains unchanged in the incoming post. If this function is activated, the former entry will be marked as done and deleted immediately (moved to recycle bin).
Mark replied entry as done	If entries are replied they remain unchanged in incoming post. If this function is activated the forwarded entry is marked as done.
Delete replied entry immediately	If entries are replied they remain unchanged in incoming post. If this function is activated the entry is deleted (moved to recycle bin) after forwarding. Note: The document is not deleted in the archive.
Mark forwarded entries as done	If entries are forwarded they remain unchanged in incoming post. If this function is activated the forwarded entry is marked as done.
Immediately delete forwarded entries	If entries are forwarded they remain unchanged in incoming post. If this function is activated the entry is deleted (moved to recycle bin) after forwarding. Note: The document is not deleted in the archive.

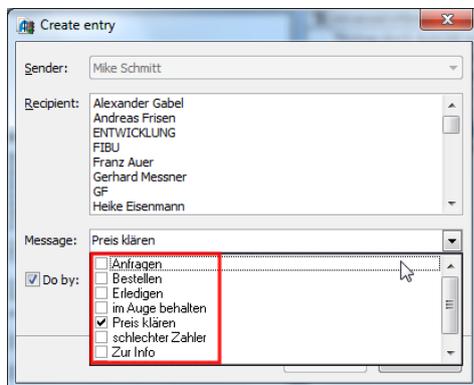


Picture 3: Extras – Settings – Edit entries – New entries

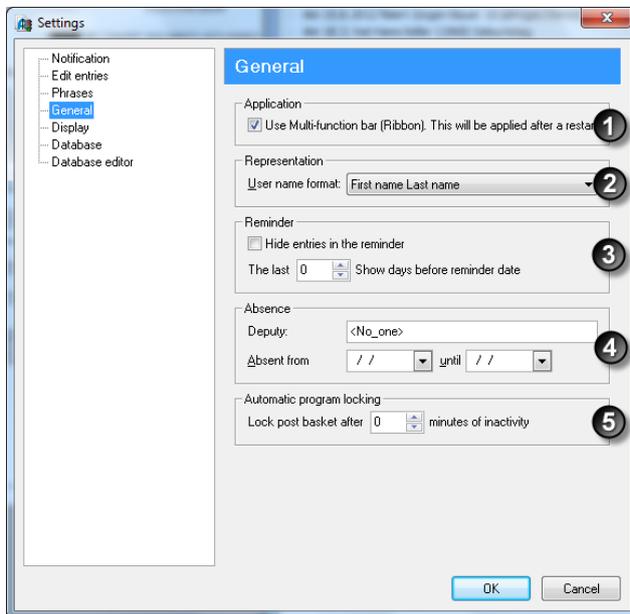
Remember last recipient Remember last text	You can set the program to remember the last recipient. This makes sense, for example, if you often use the same recipient for forwarding/new entries. The same option is possible for remembering the last notification. You also define here the standard period for forwarding and for new entries. This period can be changed manually or deleted (i.e. no deadline).
Hide new clearance	If a clearance option has been installed and has initiated clearance in your own post basket, the entry is not sent to you again (e.g. in the case of dossiers undergoing clarification).
Hide new entries created by „New entry“	If this function is activated, new entries, which were created by „New Entry“, will be moved to the recycle bin. Otherwise the entry will be forwarded to own post basket in the folder outgoing post and maybe would need to be deleted (moved to the recycle bin).
Hide new replies	If this function is activated, entries, which have been replied, will be moved to the recycle bin. Otherwise the entry will be forwarded to own post basket in the folder outgoing post and maybe would need to be deleted (moved to the recycle bin).
Hide new entries created by forwarding	If this function is activated, entries, which have been forwarded, will be moved to the recycle bin. Otherwise the entry will be forwarded to own post basket in the folder outgoing post and maybe would need to be deleted (moved to the recycle bin).



Picture 4: Extras – Settings - Phrases



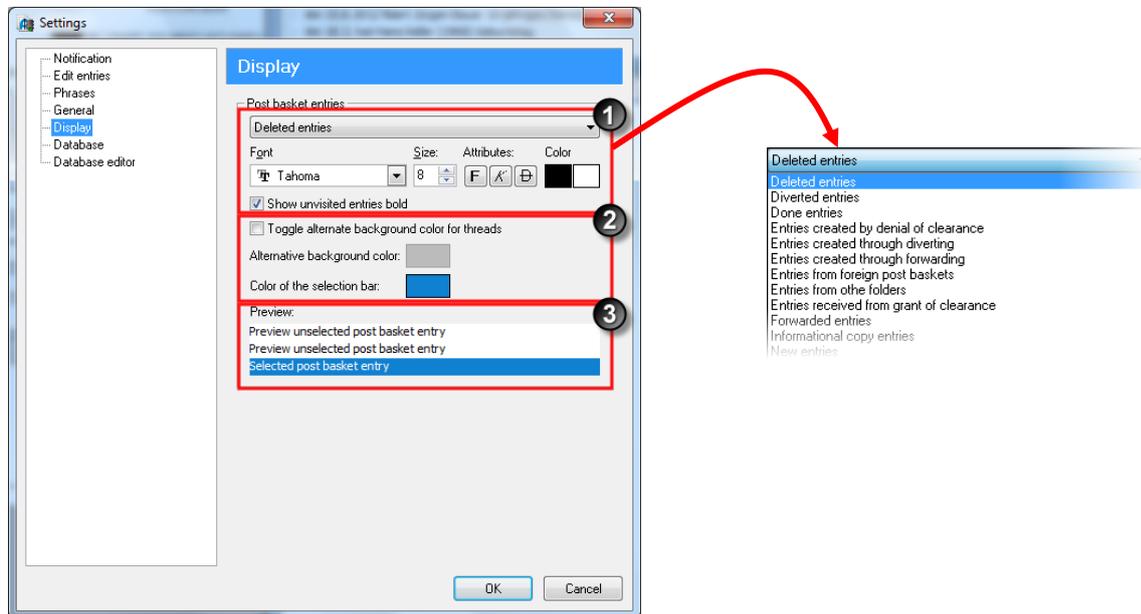
When you create new entries you may add text as information (known as phrases). Other phrases can be added via the menu Edit – Options - Phrases and can be performed by the administrator. The phrase added appears next to “new entries” in the selection box. Note: The phrases are all the same for all users.



Picture 5: Extras – Settings - General

Application (1)	Here you can define whether you want to use the multi-function bar (Ribbon) or the menu and toolbar.
Representation (2)	This is where you configure the sort/sequence of user names for selecting post basket recipients. This sort/sequence will also be used for selection of other (third party) post baskets
Reminder (3)	Dossiers to be processed at a subsequent point in time can be put on hold (reminder). So that these entries are not kept in the incoming post, where they are a nuisance, they can be hidden until they are resubmitted. You can also determine from which day prior to actual reminder date the entry should be displayed again.
Absence (4)	This shows who is deputizing for an employee in the event of absence. The absence cover arrangements are defined in a separate program (cf. item <b>Fehler! Verweisquelle konnte nicht gefunden werden.</b> Absence Cover Arrangements)
Automatic program lock (5)	To protect your entries in the post basket you can set up an automatic program lock, so that access is locked via login after expiry of the set period. <b>Remember:</b> Please speak to your administrator before setting the password protection to find out which password has been set for you in the user administration.

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Picture 6: Extras – Settings - Display

For a better overview you can configure your entries according to urgency, type of setting etc. with different colors of formatting.

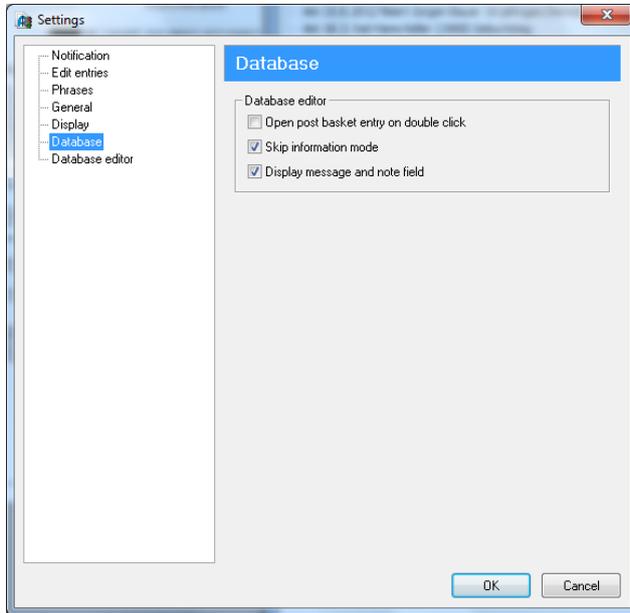
This is where you can format the entries **(1)**

- Font
- Font size
- Bold, italic, strikethrough
- Color of font selected / unselected

This is where you can format the hit list **(2)**

- Alternative background color for threads (yes/no)
- Color of selection bar

The preview **(3)** shows the effect of the respective formatting on the entries, so that these may be corrected as necessary before saving the setting.



Picture 7: Extras – Settings - Database

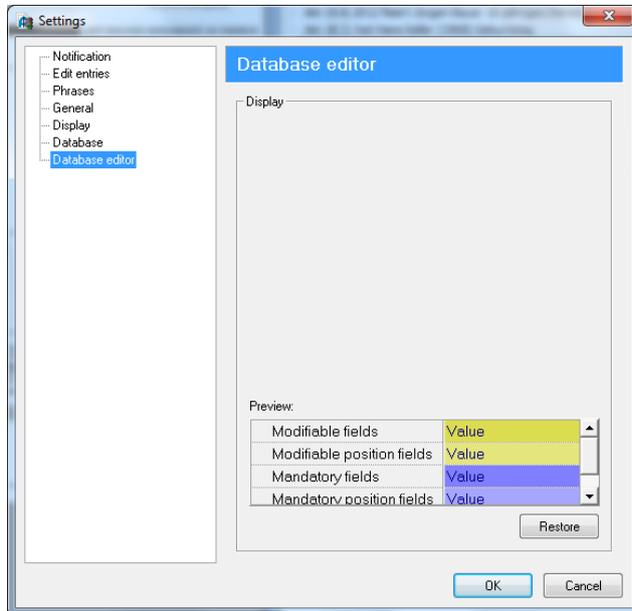
Open post basket entry on double click	If you want to call up the dossier for processing you can access the entry in the information mask by double clicking. If this function is not checked double-clicking will take you to document display (i.e in search mask).
Skip information mode	If you want to access the editing mask without going into information mode, check the field "skip information mode". When using the function "Open post basket entry on double click" or deselecting the "information" button you go directly to editing mode.
Display message and note field	In editing mode you can display the message attached to the dossier when creating the post basket entry as well as a note field for your own notes on this thread (not attached to document). To do so activate this function.

Example of a thread in information mode with message and note field displayed

Message:	Please check this invoice.		Notes:	
To do by:	08/13/2011, 1:12 PM			
Company	01	HABEL GmbH & Co. KG		
Document type	0009	SLS Invoice		
Document No.	409113			
Document date	12/16/2008			
Service report No.				
Order No.(internal)	228178			
Project no.				
Project description				
Delivery Note No.	302339			
Invoice No.	409113			
Customer/Supplier No.	33333			
Name	FEINMECHANIK MÜLLER GMBH - 775			
E-mail				

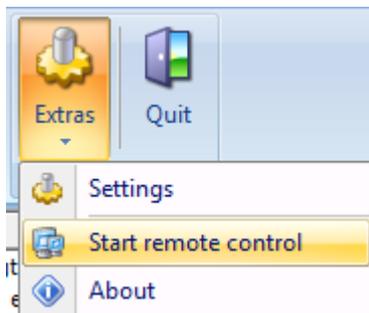
Example of a thread in editing mode without display of message and note field

Company	01	HABEL GmbH & Co. KG		
Document type	0009	SLS Invoice		
Document No.	409113			
Document date	12/16/2008			
Service report No.				
Order No.(internal)	228178			
Project no.				
Project description				
Delivery Note No.	302339			
Invoice No.	409113			
Customer/Supplier No.	33333			
Name	FEINMECHANIK MÜLLER GMBH - 775			



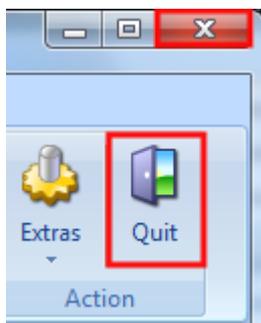
Picture 8: Extras – Settings – Database editor

The editing mask can be formatted in respect of font types, font and field colors. Various setting options can be accessed in the column editing mask.



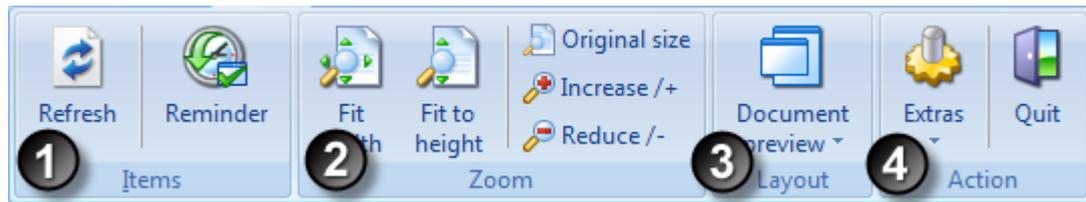
If a member of the HABEL staff asks you to start the remote, in the case of a support, you can do this with the command Extras – Remote.

If you may need information about the version, you can find them under the command Extras – Info.



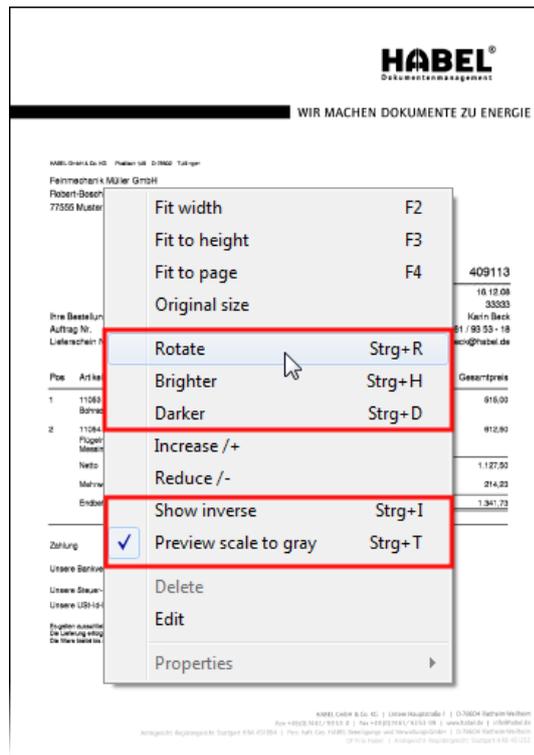
To close the whole post basket, choose the command Exit or click on the X in the right corner of your screen.

Register „View“



Refresh entries (1)	You can refresh the view manually (i.e. the overview of the entries in the post basket in order to make new entries visible) by pushing F5 or the Refresh button.
Show reminder (1)	Entries, which you have put on hold, will only be displayed at a specific time. To display all reminders you can use the command Reminder. This symbol shows you, that the reminders are displayed. 
Zoom (2) Fit to width Fit to height Original size Increase / + Reduce / -	If a document preview is shown, the document can be fitted to width or height, as well as displayed in its original size. Also the document can be increased or reduced in the preview. Alternatively you can pull a frame with your mouse to increase special areas. By a double click the preview fits its size to the initial size. This function behaves analogue to the retrieval. Specials: Even when the document preview is not active, you can display the document in the full screen mode with F11.
Layout (3) Document preview	Here you can define whether you want to see a preview of the document and where it should be shown (at the top, at the bottom, on the left or on the right).
Aktion (4) Extras Exit	Here you will find the same functions as already described in the tab "Activities".

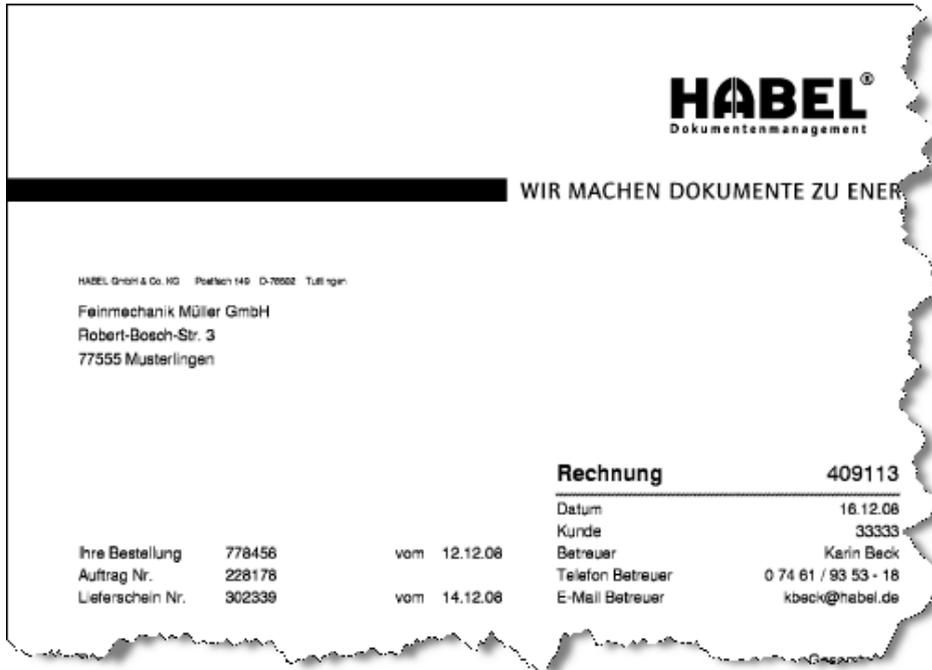
Pop-up menu



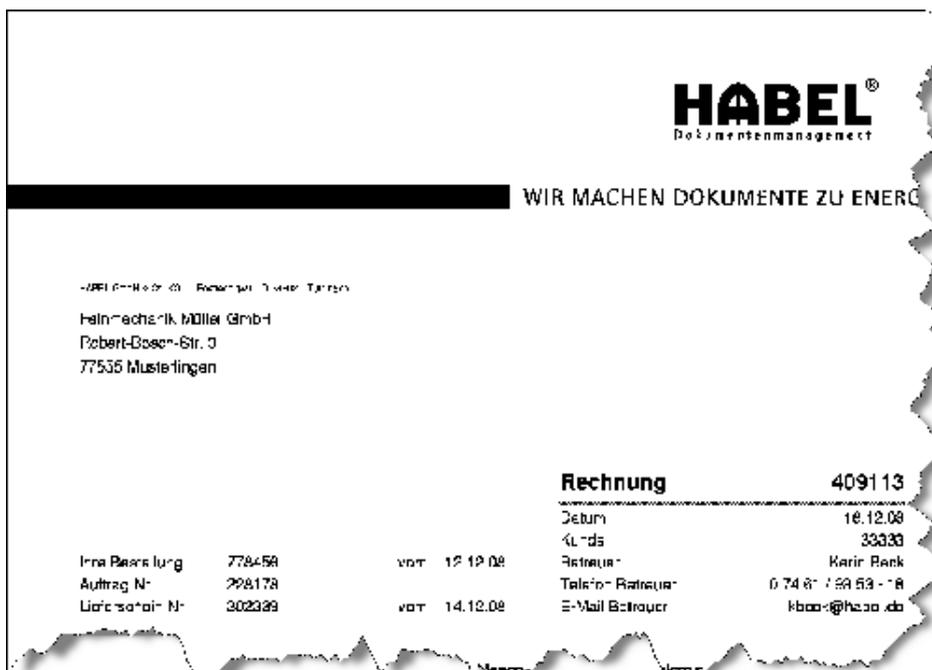
The pop-up menu contains further settings in connection with the document preview:

Rotate	If the document has been archived the wrong way round use CTRL + R or this command to rotate it.
Brighter Darker	The document can be made brighter (CTRL + H) or darker (CTRL + D).
Show inverse	The document can be shown inverted (CTRL + I) (black areas become white and white areas become black)
Scale to gray	Set whether the document should be shown with or without scale-to-gray. The difference in display with or without scale-to-gray is shown on the following page.

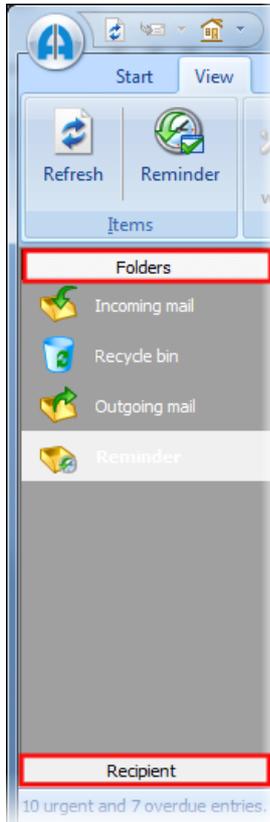
Without scale-to-gray



With scale-to-gray



### 3. Usage of the column Folder/Recipient



On the left there are folders and recipients provided. They can be used for a better overview / structure and the fast access in the post basket.

Four folders are standard (Incoming post, recycle bin, outgoing post, reminder). Others can be created yourself.

Incoming post: Here you will find the new entries.

Recycle bin: All entries which are deleted are moved automatically into the folder recycle bin. Here they can be finally deleted (pop-up menu Purge entry).

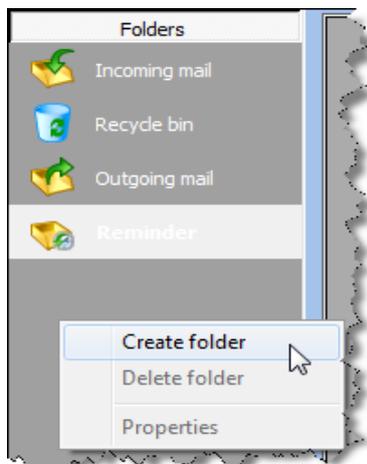
Outgoing post: In the folder outgoing post there are all entries, which you have forwarded to other post basket owners (over the commands Forward, New entry, Reply).

Reminder: In the reminder folder you will find all entries which you have put on hold. You can also access the reminder in the incoming post, but there they are displayed between all the other entries.

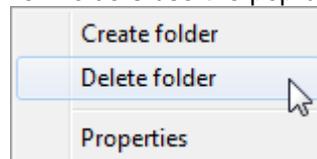
Entries, which belong into special folders, can be put there by drag & drop. If the entry is situated in a workflow and the destination folder is a self made folder, the entry cannot be moved.

The folder Recipient is used for post basket user, who you often forward entries to.

#### Folder

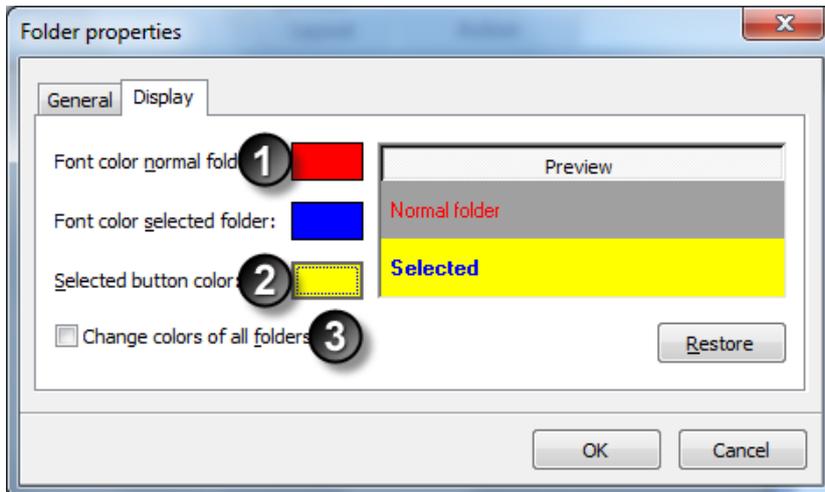


The order of the folders can be changed by drag&drop. To create new folders use the pop-up menu (right click on the column Folder).



Folders that you have created can be deleted again (pop-up menu).

Settings in the folder properties can also be carried out in the pop-up menu.



You can adjust the color for the folders **(1)** and the selection bar **(2)**. If you check the command “Change colors of all folders” **(3)** this color setting will be adopted for all folders, otherwise it will apply only for the selected folder (within your own post basket or the post basket in which the changes have been made)

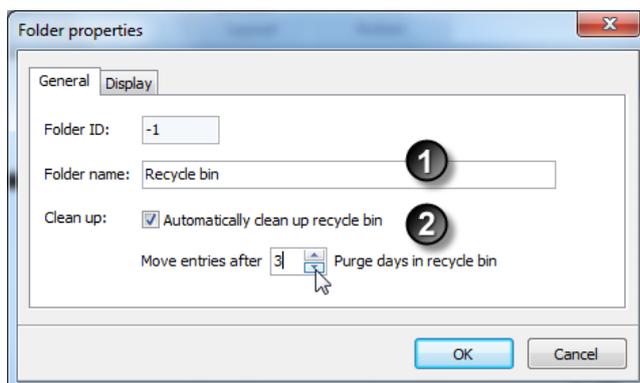
That would be the effect of this setting:  
*Folder not selected (i.e. normal)*



*Folder selected (i.e. clicked)*



The recycle bin as well as the outgoing post can be cleaned up automatically. For this select with a right click the particular folder the pop-up menu and the command Properties.



Here you can also change the name of the folder (possible for each folder) **(1)**.

All entries you move to the recycle bin by deleting them from the incoming post folder are deleted in the recycle bin after a specific period (defined by you) **(2)**.

Recommendation: You should specify a period here otherwise the post basket can get very slow in the long term.

## Recipient

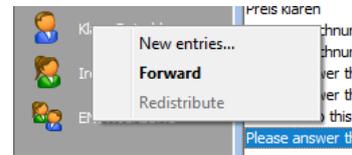


In the folders column you can save a list of recipients for post basket users to whom you often forward entries. To create a recipient click with the right mouse button on the empty field below the entry "Recipients" and select "Add" **(2)**.

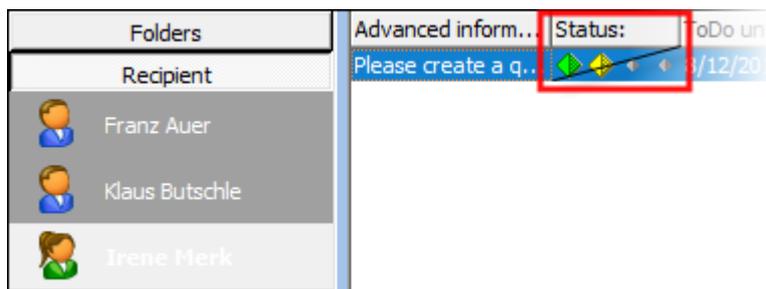
You obtain the recipient selection box from which you can also select several recipients at once (click with CTRL button held down).

If you click on a recipient with the right mouse button all entries become active in the pop-up menu. You can also use this command to remove the recipient from the list again **(3)** or call up all the recipient's unfinished entries **(1)**. Clicking on the respective recipient provides a view of the entries which you sent and have not yet been accomplished.

To send a message to a recipient from the list, move the required entry to the recipient using Drag & Drop. The recipient then receives the entry as a forwarded entry. On the other hand, if you want to create a new entry and send it to the recipient on the list, move the message from your incoming post to the recipient with the right mouse button held down. You will then get another pop-up menu for creating new entries (advantage of creating a new entry: you can select other recipients and also enter messages and notes).



Under the recipients tab you can also redistribute the entries. This is done by simply dragging the entry via Drag & Drop from one recipient to another. The original recipient keeps the entry along with the indication (strikethrough) that the entry has been deleted by sender (i.e. no longer needs to be processed by this recipient).



#### 4. Overview of the symbols

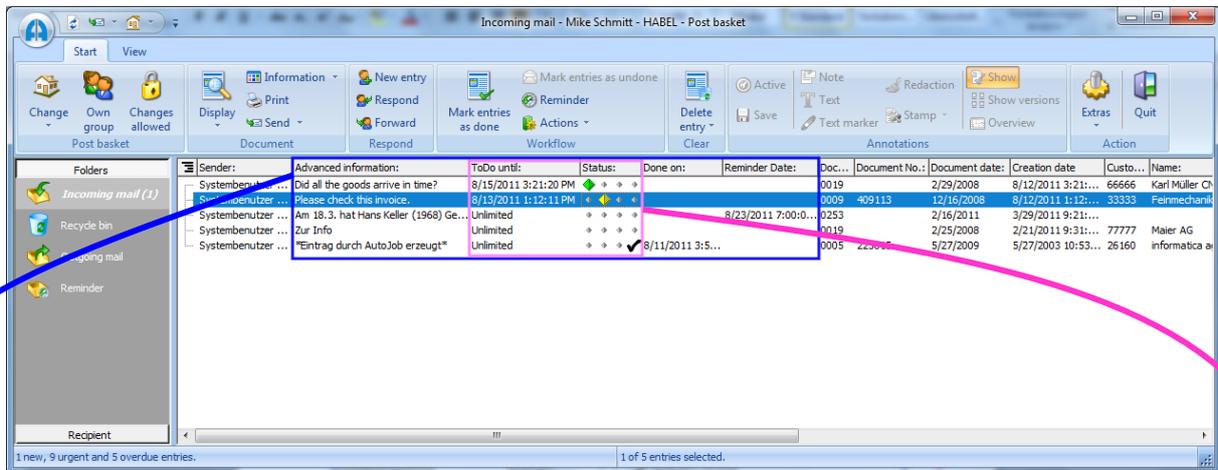
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Various symbols are displayed within the post basket entries as a result of forwarding, releases, workflows etc. Here is an overview of the symbols and their meaning.

-  The entry is in the workflow and should be processed by the recipient
-  The entry is in the workflow but is blocked for some reason  
(This symbol is not part of the standard. It designates all entries that may not yet be processed due to the envisaged processing sequence)
-  The entry is at the end of a workflow or payment release sequence
-  The entry has been processed in the workflow / Payment release has been issued
-  Payment release has been declined
-  The entry has been forwarded by the recipient

## 5. Hit list

You are already familiar with the hit list from the retrieval. In the post basket the hit list is not produced by entering search terms and the result but by selecting the corresponding folder (in this example: incoming post) and the post basket entries that have been created for you. However, the view is the same – you obtain a selection of columns with respective values from the database fields assigned to the document thread.



Post basket, unlike retrieval, employs a number of other database fields relating to deadlines, traceability and structuring.

Advanced information:	ToDo until:	Status:	Done on:	Reminder Date:
Did all the goods arrive in time?	8/15/2011 3:21:20 PM	◆ ◆ ◆ ◆		
Please check this invoice.	8/13/2011 1:12:11 PM	◆ ◆ ◆ ◆		
Am 18.3. hat Hans Keller (1968) Ge...	Unlimited	◆ ◆ ◆ ◆		8/23/2011 7:00:0...
Zur Info	Unlimited	◆ ◆ ◆ ◆		
*Eintrag durch AutoJob erzeugt*	Unlimited	◆ ◆ ◆ ◆	8/11/2011 3:5...	

*Additional information* contain the messages added when creating the post basket entry and constitute the “task” for the post basket recipient. *Status* shows by means of color markings to what extent the specified deadline (shown in the column “To be completed by”) is being met:

- Green status: New
- Yellow status: Due
- Red status: Overdue
- Ticked status: Marked as done

ToDo until:	Status:
8/15/2011 3:21:20 PM	◆ ◆ ◆ ◆
8/13/2011 1:12:11 PM	◆ ◆ ◆ ◆
Unlimited	◆ ◆ ◆ ◆
Unlimited	◆ ◆ ◆ ◆
Unlimited	◆ ◆ ◆ ◆

Entries marked in bold type are entries that have not yet been viewed. They will change to normal font as soon as selected. Use the menu option Extras - Settings - Notification to define the number of seconds until the status should change to “seen”.

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Documents with a reminder date should ideally be hidden in the incoming post and appear again when the reminder date is reached or after a preset X number of days. However, the entries can still be shown at any time. If entries with reminder date and notes exist and are shown, the fields *Notes* and *Reminder date* are displayed. The display is associated with the post basket (and not with the document), which means that only the post basket owner or those with access to the post basket can see the notes/reminder date for the document.

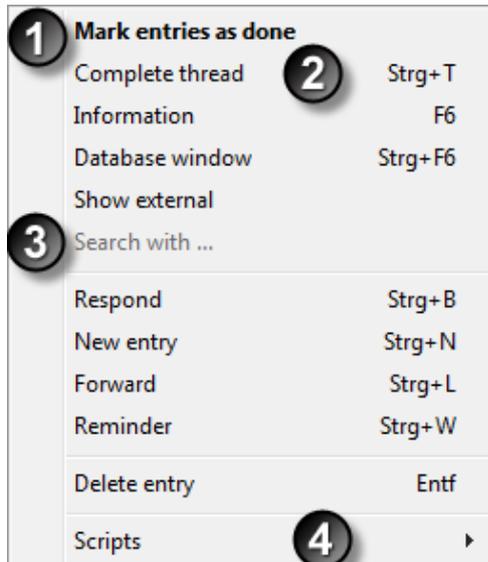
Notes:	Reminder Date:
--------	----------------

Under "Notes" you will see the information you have entered when setting the reminder date. Alternatively, you can enter a note by clicking in this field directly in the hit list. This note field is also displayed in the information mask when activated.

Don't forget!	9/21/2012
	8/23/2011 7:00:0...

Other database fields that are not available in the retrieval or the document capture programs are *Sender* and *Recipient*, naming the person who created the entry for this post basket as well as the person who received the entry.

Pop-up menu in hit list (right-click on entries)



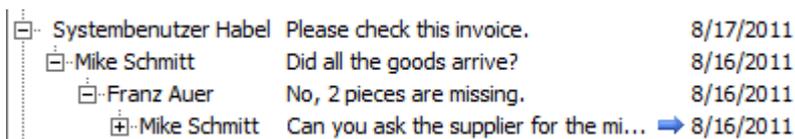
The pop-up menu contains the familiar functions

- Information (F6)
- Database window
- Display external
- Respond
- New entry
- Forward
- Reminder
- Delete entry

as well as the functions *Mark entries as done*, *complete thread*, *search with and* – provided that you have the module **HABEL-SCRIPT for post basket** – *Scripts* (4).

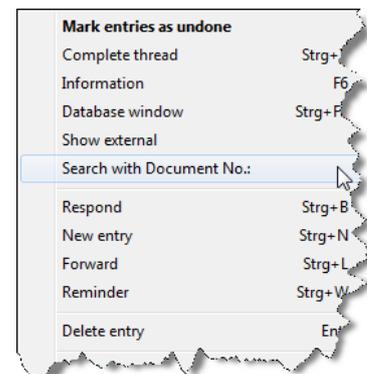
The entry can be given a tick in the status using the function “Mark entries as done” (1) and is regarded as done, but remains in the incoming post. To move the document to the recycle bin (i.e. to delete it), it has to be deleted in addition (Delete entry or Del. button). Alternatively, use the menu Edit – Options – Edit entries to determine that completed threads are to be deleted immediately. If the file has been marked as done, the “Mark as done” changes to “Mark as not done”.

“Complete thread” (2) means that all movements concerning this entry will be displayed in a tree view. This could be forwarding, new entries, questions, clearances, etc. which concern this document (over different post baskets).



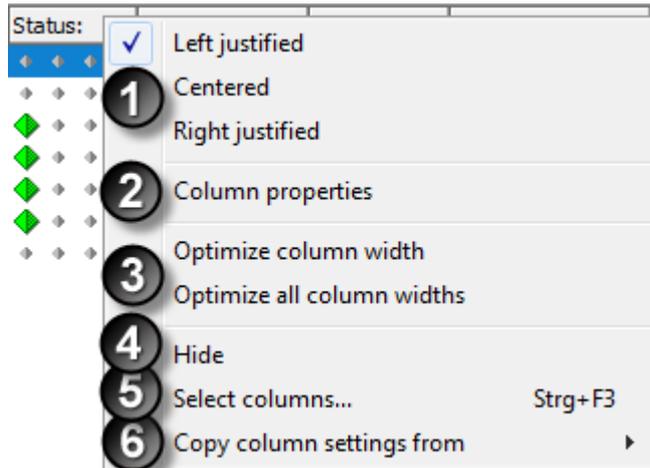
With clicking on plus / minus the tree can be faded in or out. New entries are to be found on the same level, forwardings are inserted.

The command *Search with* is only active for fields for which there is a link to external programs (in this example: document number). If you select the command “Search with document number”, the document number of the highlighted entry is passed to the retrieval to carry out a search using this document number (document number field in search mask is completed with this value and the search started).



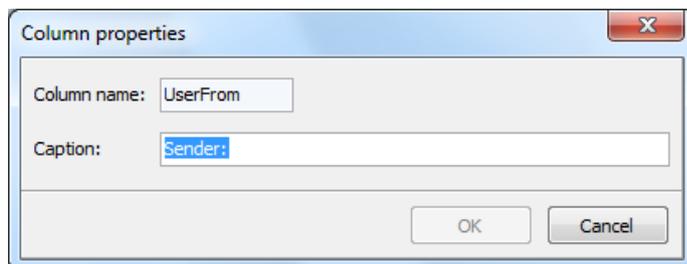
Pop-up menu in hit list for columns (right-click on column heading)

Right clicking on a column heading will give you another pop-up menu for implementing settings related to the column view.



You can change the alignment of the entries in the columns *left* or *right justified* and *centered*. **(1)**

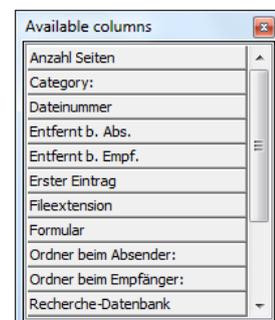
Under *Column properties* you can modify the column heading (without changing the internal name, which stays the same in the retrieval too) **(2)**



Via *Optimize column width* **(3)**, the column via which the pop-up menu has been called is adjusted to the optimum width of the longest entry. The next command is available if you want to *Optimize all column widths*.

Columns can be faded out (command Fade out) **(4)** and be made available via *Select columns* **(5)**. Also there are columns provided over *Select columns* which are currently not displayed.

If you want to copy the column settings from one folder to another use the menu *Copy column settings* **(6)** and select the corresponding folder



Sort / Change order

By clicking on the column heading you can sort the entries based on this criterion in ascending and descending order (arrow in column heading shows direction). If you hold down the shift key when clicking on the column you can also sort according to other sub-criteria. The settings remain saved when closing the program.

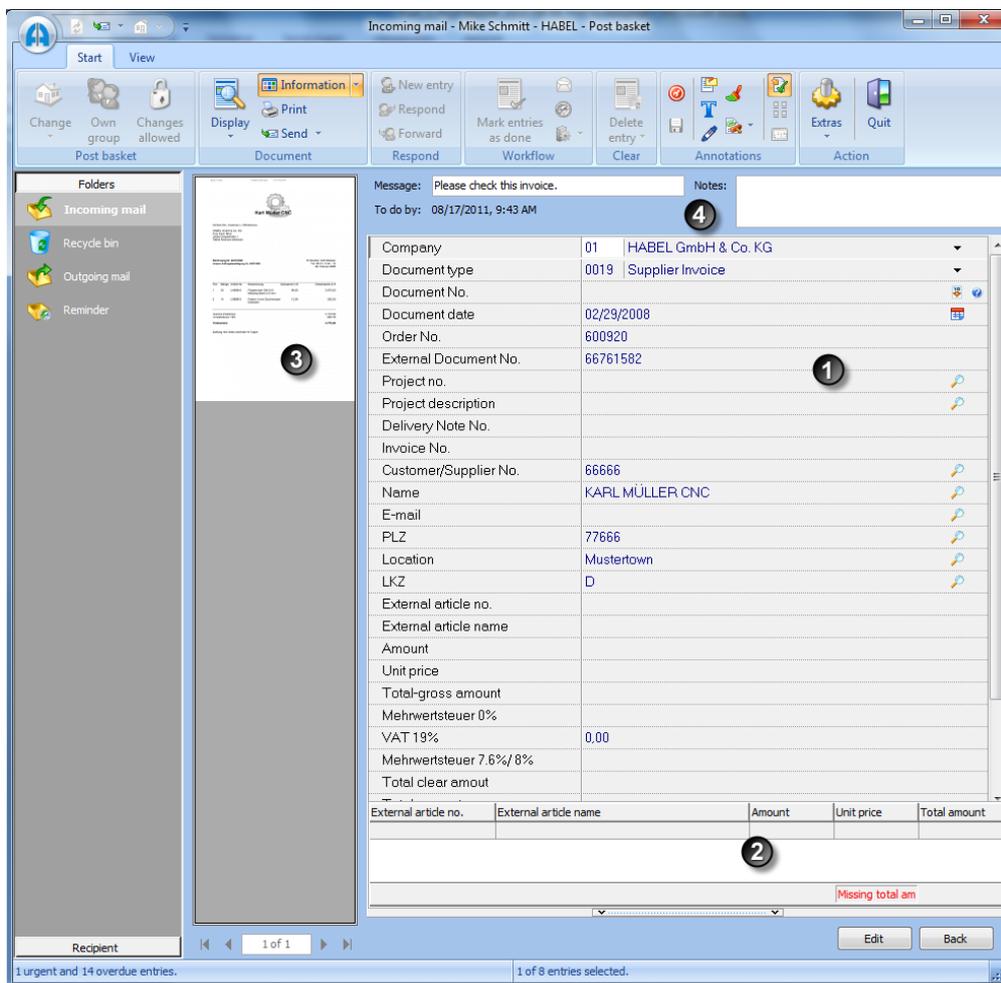
Sender:	Advanced information:	W	ToDo until:
<input type="checkbox"/> Systembenutzer Habel	Please check this invoice.		8/17/2011 9:43
<input checked="" type="checkbox"/> Mike Schmitt	Did all the goods arrive?		8/16/2011 9:43

The columns themselves can be placed at any position using Drag & Drop (hold mouse button down on the column and move).

Sender:	Status	Advanced information:
Systembenutzer Habel		Antrag durch AutoJob erzeugt*
Systembenutzer Habel		Am 18.3. hat Hans Keller (1968) Ge...
<input checked="" type="checkbox"/> Systembenutzer Habel		Please check this invoice.
Systembenutzer Habel		Zur Info

## 6. Information and editing mask / input mask

You can access the *Information mask* via the command *Information* in the register *Start – Tab Document* as well as via function key F6. If you have used *Extras – Settings – Database* to configure the editing mask to open on a double-click, you can also open the information mask by double-clicking on the entry (provided you have not activated the skipping of the information mode). If you have ticked “skip information mask” you can go straight to the editing mask via the buttons/menus/function keys relating to information.



The input mask displays the database fields belonging to the dossier **(1)** (including fields with multiple entries **(2)**) and – if activated – the document preview **(3)** and message/notes. The message/notes are not to be confused with the annotations **(4)** affixed to the document using **HABEL-ANNOTATION**. Message is the information included when creating the entry and forwarding it. Notes are for your own information and are added to the entry in post basket, for example as processing aids for your own use (affects only the entry and under certain circumstances not the archived file as such).

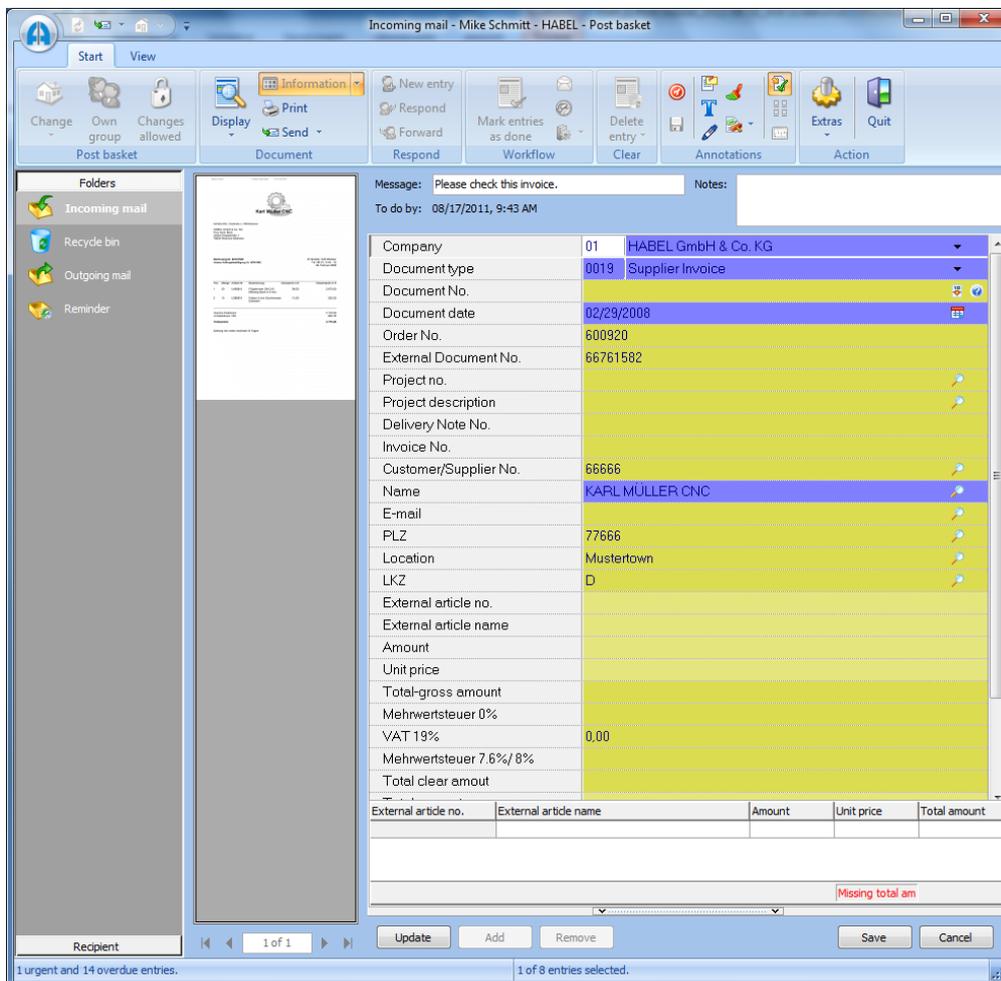
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Notes, markings etc. can also be attached in this status via the register *Start - Annotations* and if you have **HABEL-ANNOTATION** on the document (directly above the document preview).

You have to switch to editing mode in order to change database fields as well. If you have not reached the editing mask directly you can do so via the edit button in the information mask. Use “back” to return to the hit list.



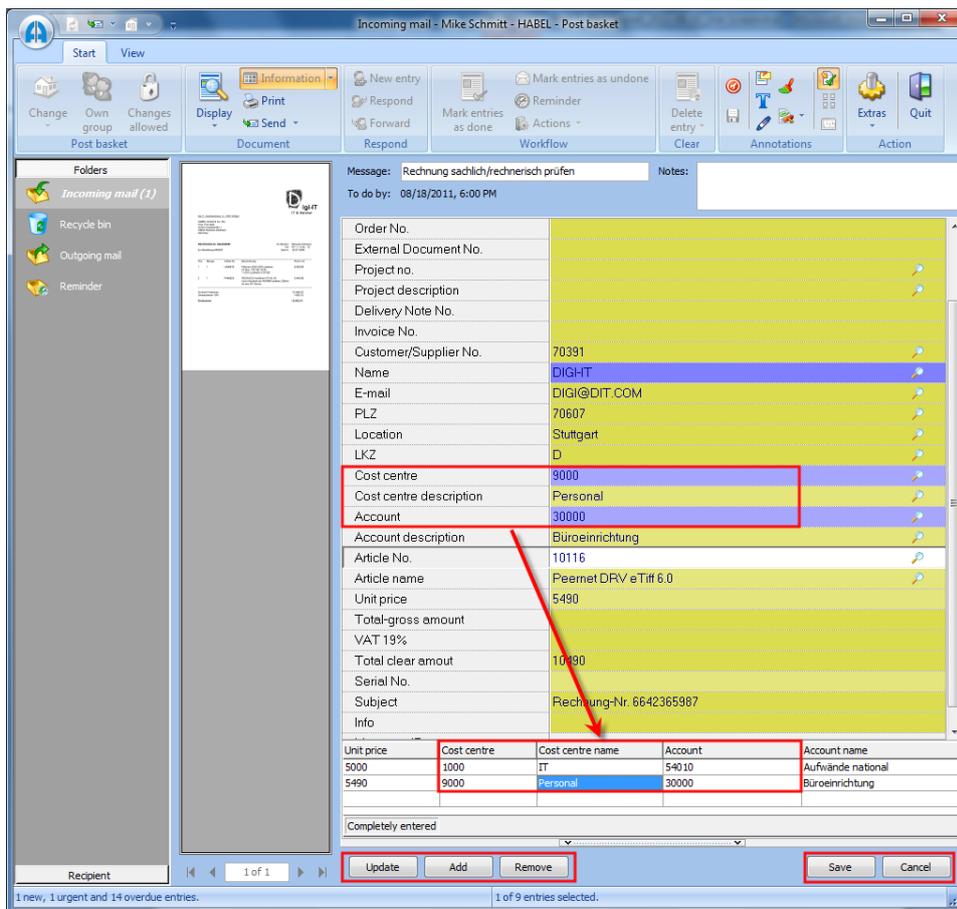
The editing mask differs from the information mask in respect of the database fields and the command buttons.



The database fields have different colors depending on type of field:  
*Optional fields*      yellow /      *Optional fields with multiple entry*      pale yellow  
*Mandatory fields*    blue /      *Mandatory fields with multiple entries*    light blue  
*Blocked fields*        gray

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The colors can be adjusted using *Edit – Options – Editing mask*. The system has configured which fields are optional, mandatory or multiple entries. To carry out changes, click directly on the field to be changed and overwrite the contents. If items have to be modified or deleted, click in the item table (1), the entry is highlighted. The content of the highlighted item is displayed in the mask where you can carry out changes.



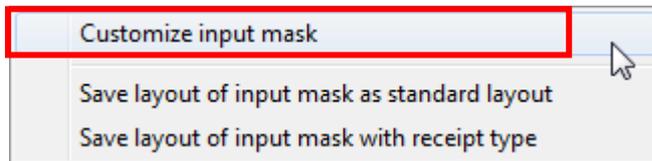
(2) Use *Update* to transfer the changes to the item table. If you want to insert the same item again, select it and copy it by pressing the *Add* button. You can still carry out changes in the fields – close this thread with *update*. To delete table rows use the *Delete* button after highlighting the row.

(3) When all changes have been made save them with the *Save* button. If the changes are not to be saved use *Cancel*.

Generally:

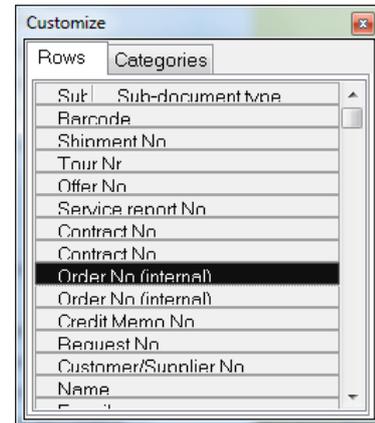
In order to make changes you have to have the appropriate authorizations. All data recorded in the post basket can also be searched for in the retrieval, as the databases are identical.

Layout Adjustments in the Information/Editing Mask

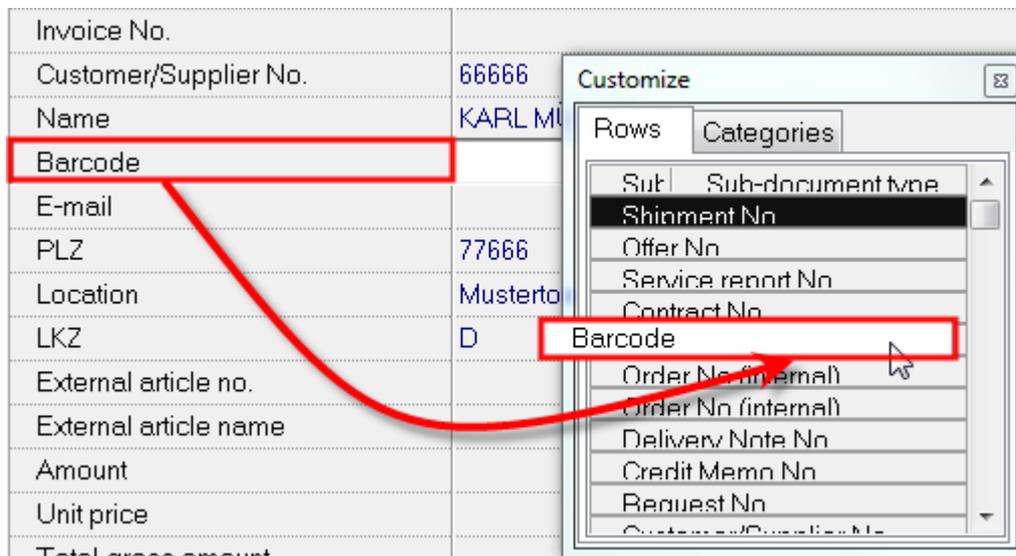


Right click to access an additional pop-up menu in the information or editing mask.

By selecting the command *Customize input mask* a box opens with the tabs rows and categories.

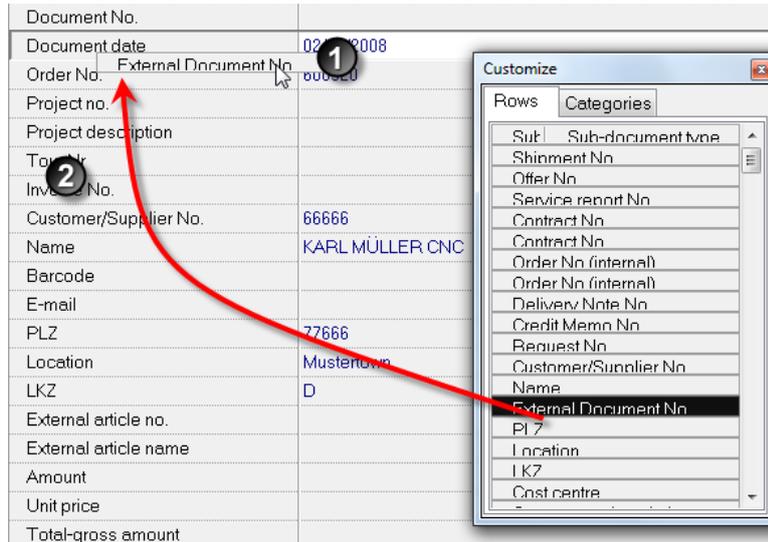


The rows tab can be used to hide rows from the mask, for example if they are not of interest to the user. To do this drag the rows into the box with the mouse button held down. The hidden row is shown there. To enter the row into the mask again, drag it back. You can also define rows nested with other rows and create categories (see examples on following page).



Examples

Here the row *external document number* is taken out of the box back into the mask.



The bars (1) in combination with the selected target field are decisive for the placing of the field (2).

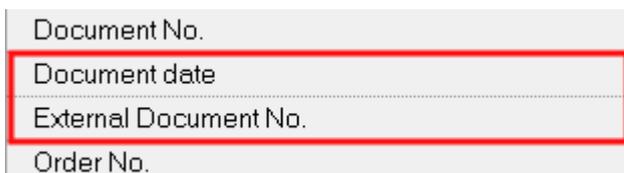
If you release the mouse button at this point, the external document number is added grouped with the invoice number. You can use the grouping, for example, if you want to show rows summarized (identifiable by means of the + (summarized) and/or – (nested representation) in front of the row name).



If you want to place the field at the same level as the invoice number, drag the row to be shown to the right until both bars are over one another and an arrow appears. (3) If you then release the mouse button the row is inserted at the same level.

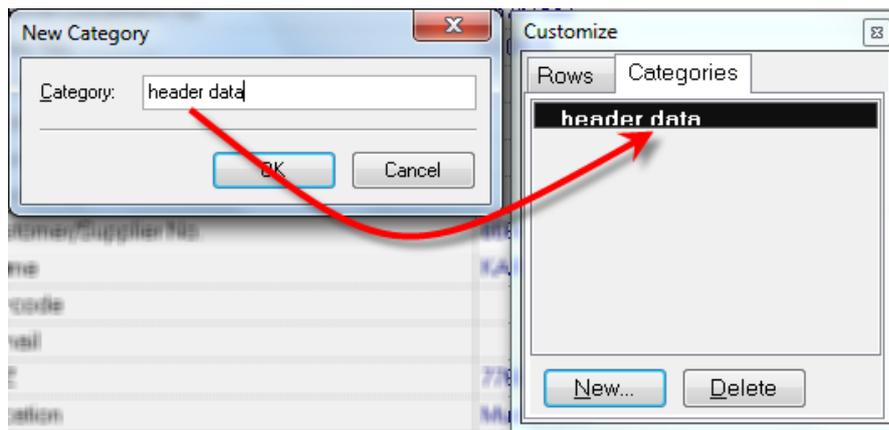


Note: The row is inserted over the selected target field.



You can also create categories for your own editing structure. As specific field groups may not be of interest to you, as you do not need them for processing, they can be combined into a category.

Switch to the adjustment box on the categories tab and create new categories using the new categories button. The categories are shown in the box and can be moved to the input mask.



Here too, please note when dragging categories into the mask:

- Bars offset to one another – grouping
- Bars over one another + arrow – same level

Now drag the rows grouped to the category you would like to combine.

Order No.
<b>header data</b>
Project no.
Project description

Order No.
Project no. <b>header data</b>

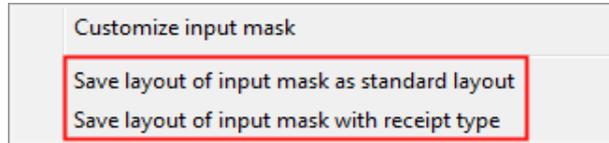
“Expanded” display

<input type="checkbox"/> External Document No.	66761582
<b>header data</b>	
Order No.	600920
Offer No.	
Delivery Note No.	

Combined display

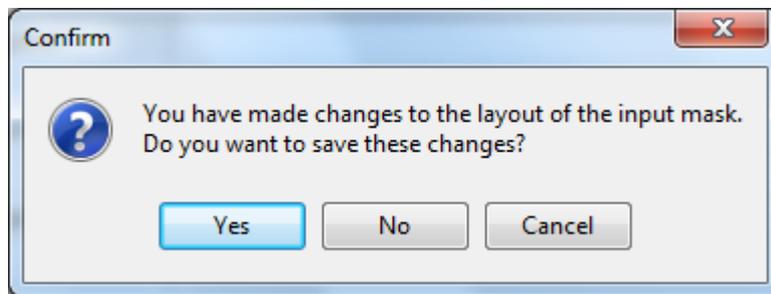
<input type="checkbox"/> External Document No.
<b>header data</b>
Project no.

You still have to save your settings in the mask. There are two options: standard layout or with document type.



If you save the layout as standard, the setting is saved as default setting for you, so that all documents will have this structure (if the respective fields are available). If you save the layout with document type, the setting will be adopted and represented only for this document type.

If you do not save the changes you will receive a corresponding prompt on closing the mask.

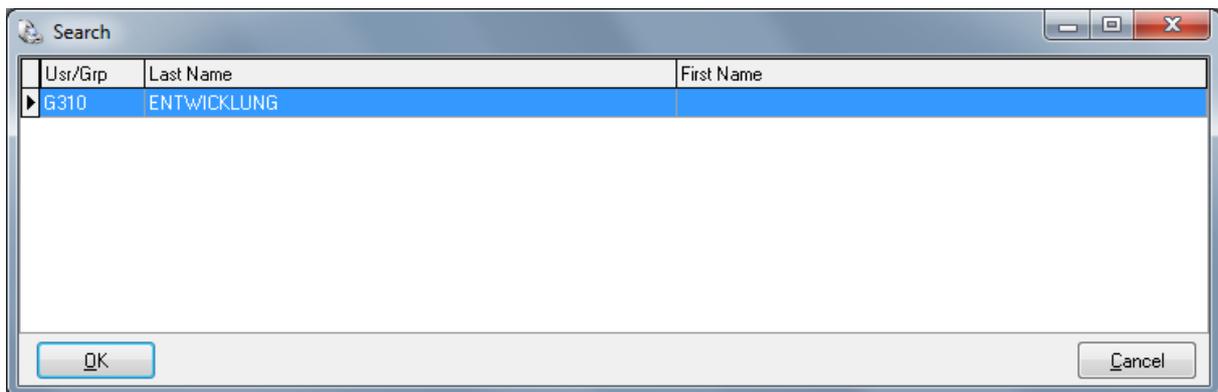


Additional pages can also be configured for the input mask. For example, to allocate fields only of interest for certain departments like the accounts department. By means of special assignment of authorizations the additional pages can be hidden for access.

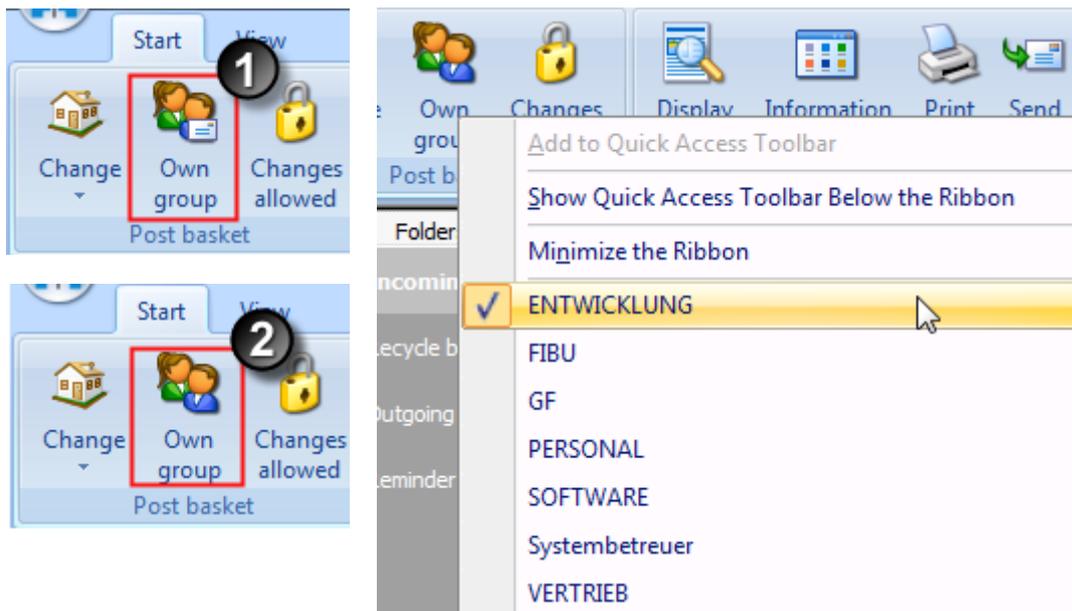


## 7. Group post baskets

As already mentioned, there are also group post baskets comprising several members in addition to the individual post baskets. A group post basket is often used in the case of teams that are sent the respective files from the group post basket for processing or retrieve these themselves. To send a message or an entry to a group post basket the required group post basket must be selected in the input (capturing) process.



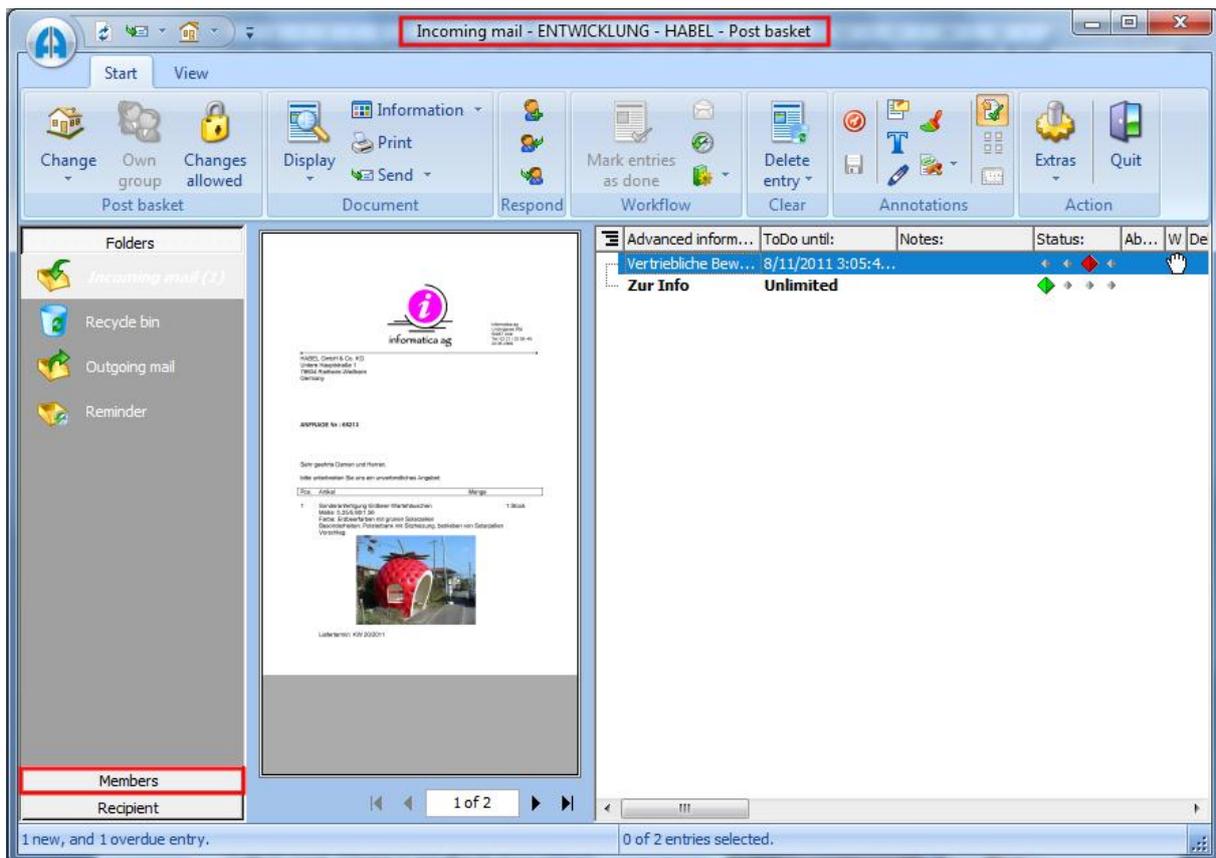
To open a group post basket, select the group (e.g. Development) in the user selection box and view the contents of the group post basket. You can also switch to the group post basket using the icon **(1)**. If you are a member of several group post baskets, you can also right click on this icon to define which group post basket you wish to change to by clicking on the icon and/or which group post basket you want to monitor. It is called monitoring because a letter symbol appears whenever there is a new entry in the group post basket. **(2)**



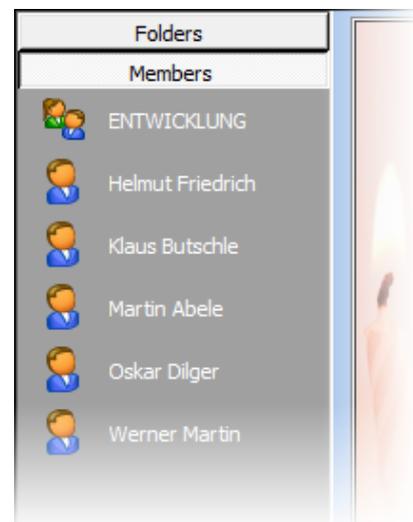
WE CONVERT DOCUMENTS INTO ENERGY

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The folder *members* shows who are the members of this group. You can also have access to group post baskets if you are not a member of the group. However, if you are to receive entries from group post baskets of which you are not a member, this is only possible via the forward/new entry menus. However, the entry itself stays in the group post basket, unless it is moved to the recycle bin (i.e. deleted).

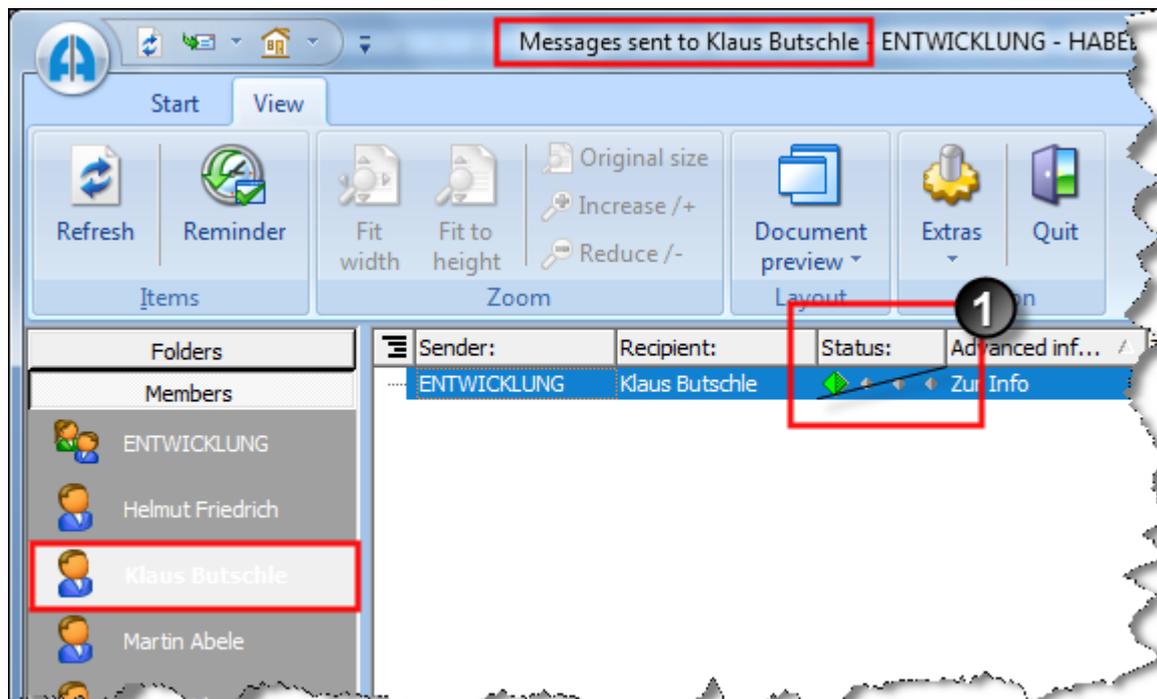


Otherwise the entries in the group post basket can be moved simply to the members using Drag & Drop. This process is equivalent to forwarding. The entry disappears in the group post basket and is available for processing in the recipient's post basket. A tree structure shows that the original entry started in the group post basket.



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Of course it is still possible to subsequently redistribute entries, e.g. if too many tasks have been assigned to one person or this person is absent. Generally the group leader has the right to redistribute entries and therefore can access the members' post baskets. This is done by selecting the group post basket and accessing the members (clicking on a member shows the entries sent from the post basket and not yet accomplished). Using Drag & Drop the entries can be redistributed to other members. The entry stays in the original post basket but is marked in such a way as to indicate that it no longer has to be processed by this person (1).



## 8. Absence cover arrangements

If people are absent (due to vacation or illness) an absence cover procedure can be configured so that entries are passed on to the person deputizing for the absentee, and do not remain unprocessed in the post basket until the person's return. The absence cover procedure is not configured in the post basket but via a separate program, the Absence Assistant.



When you have opened the program with a double-click, you will get an overview of the post basket users for which absence cover rules have been configured and where you can add other arrangements.

The screenshot shows a window titled "HABEL - Abwesenheit und Vertreter". On the left is a table with columns: Anwender, Deputy, Absent from, and Absent until. The table contains the following data:

Anwender	Deputy	Absent from	Absent until
Franz Auer	Alexander Gabel		
Oskar Dilger	Martin Abele	5/5/2011	12/31/2013
Mike Schmitt			
Systembenutzer Habel			

On the right side of the window, there are four dropdown menus labeled: Anwender (set to Mike Schmitt), Vertreter, Abwesend von, and Abwesend bis. Below these are three buttons: Delete, Add, and Update. At the bottom right of the window is a button labeled "Beenden".

On the left you see the users and their representatives that are already established. Because no absence dates have been entered the absence cover rules are not active. By selecting the users on the left the fields on the right are completed and are available for entries (e.g. details of absence period).

You can use *Delete* to delete existing rules, and activate modified rules using *Apply*.

With *Delete* you can *delete* existing rules and with *Accept* you can *accept* changes rules.

Anwender	Deputy	Absent from	Absent until
Franz Auer	Alexander Gabel		
Oskar Dilger	Martin Abele	5/5/2011	12/31/2013
Mike Schmitt			
Systembenutzer Habel			

Anwender: Oskar Dilger  
 Vertreter: Martin Abele  
 Abwesend von: 5/5/2011  
 Abwesend bis: 12/31/2013

Delete Add Update

If you want to store new rules with users and their representatives who are not yet listed, select a new user from the selection box behind the “user” field. The *Add* command becomes active and adopts the required data (user, representative, period of absence) after they have been input.

Anwender: Klaus Butschle  
 Vertreter: Franz Auer  
 Abwesend von: 6/22/2011  
 Abwesend bis: 7/1/2011

Delete Add Update

Anwender	Deputy	Absent from	Absent until
Franz Auer	Alexander Gabel		
Oskar Dilger	Martin Abele	5/5/2011	12/31/2013
Mike Schmitt			
Systembenutzer Habel			
Klaus Butschle	Franz Auer	6/22/2011	7/1/2011

Anwender: Klaus Butschle  
 Vertreter: Franz Auer  
 Abwesend von: 6/22/2011  
 Abwesend bis: 7/1/2011

Delete Add Update

Messages now sent to Klaus Butschle are forwarded automatically to Franz Auer.

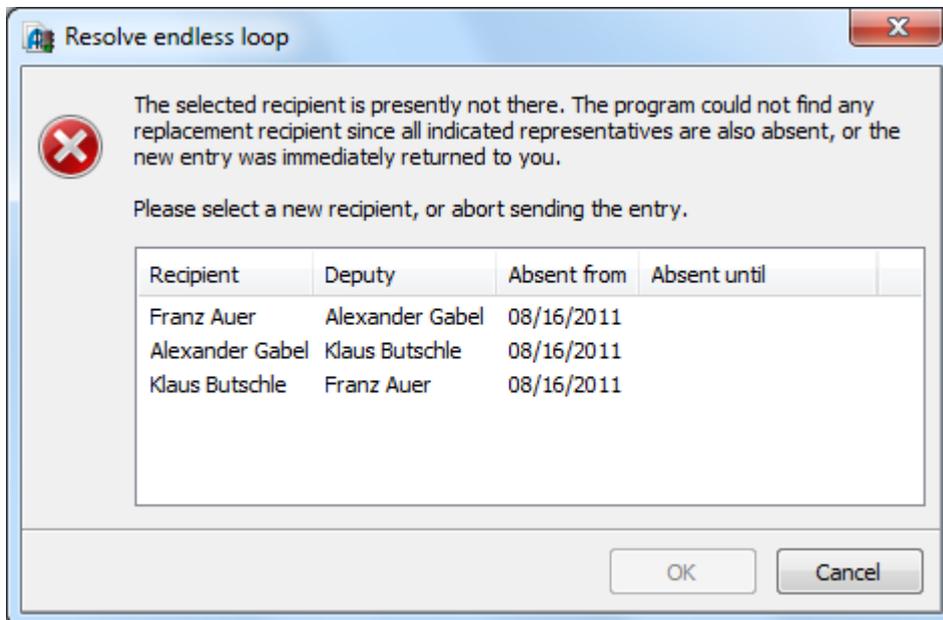
There is no entry in the post basket of Klaus Butschle, while in the post basket of Franz Auer the entry appears with indication of the original sender and the note: Forwarded due to absence (shown by green arrow). He then processes this file just like his own.

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Sender:	W Recipient:	Advanced information:	ToDo until:	Status:	Not
Mike Schmitt	Klaus Butschle	Please check this invoice.	8/17/2011 9:43:31 AM	◆ ◆ ◆ ◆	
Mike Schmitt	→ Klaus Butschle	Please answer this enquiry.	8/12/2011 3:34:20 PM	◆ ◆ ◆ ◆	◆ ◆ ◆ ◆
Mike Schmitt	Klaus Butschle	For your information.	Unlimited	◆ ◆ ◆ ◆	◆ ◆ ◆ ◆

If several absence cover rules have been created and the deputizing staff are also absent, the entry is passed on until it reaches a post basket user who is present. If an absence "loop" has been created, so that none of the deputizing staff are actually present, you will receive information when forwarding the entry to the effect that it cannot be sent due to an "endless loop". You can then select a new recipient (choose the abort button and decide on another colleague) or completely stop the forwarding process.

Anwender	Deputy	Absent from	Anwender
Franz Auer	Alexander Gabel	6/22/2011	Vertreter:
Klaus Butschle	Franz Auer	6/22/2011	Abweser:
Alexander Gabel	Klaus Butschle	6/22/2011	Abweser:
Oskar Dilger	Martin Abele	5/5/2011	Abweser:
Mike Schmitt			Abweser:
Systembenutzer Habel			Abweser:



## Special features

In conjunction with the post basket there can be created functions, which can have customized influences. As desired a description being a system documentation can be made in within the project.

Below you will see a small choice of additional functions.

### 1. Account assignment in the post basket

Within the scope of incoming invoice verification the post basket can also be used for account assignment purposes. The person responsible records the relevant accounts and cost centers directly in the post basket using multiple entry fields (master access possible if there is an account and cost center master file). The respective item is saved using the *Apply* button. The account assignment is not completed with the *Save* button until all data and items have been input.

Message: Rechnung sachlich/rechnerisch prüfen Notes: [ ]  
To do by: 08/18/2011, 6:00 PM

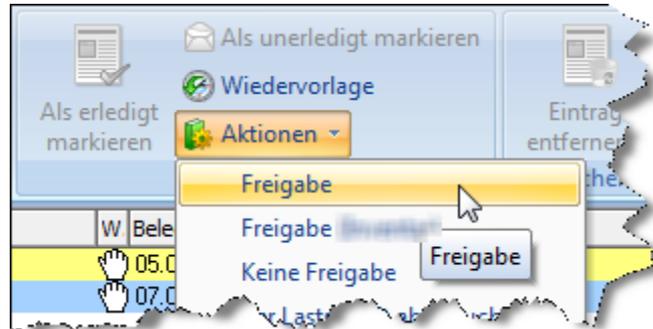
Company	01	HABEL GmbH & Co. KG
Document type	0066	Finance Invoice:
Document No.		
Document date	08/16/2011	
Order No.		
External Docu...		
Project no.		
Project descri...		
Delivery Note ...		
Invoice No.		
Customer/Sup...	70391	
Name	DIGHT	
E-mail	DIGI@DIT.COM	
PLZ	70607	
Location	Stuttgart	
LKZ	D	
Cost centre	7800	
Cost centre de...	Einkauf national	
Account	30000	
Account descri...	Büroeinrichtung	
Article No.		
Article name		
Unit price		
Total-gross a...		
VAT 19%		
Total clear am...	10490	
Serial No.		

Unit price	Cost centre	Cost centre name	Account	Account name
4000	7800	Einkauf national	30000	Büroeinrichtung
3750	8000	Finanzbuchhaltung	30000	Büroeinrichtung

Remaining amount to be [ ]

If you have to perform split entries (divide the invoice amount among several accounts and/or cost centers), you can use the module **HABEL POSTING CONTROL**, which calculates and shows the respective amount still to be allocated after each item.

The account assignment is generally completed with a payment release. Via a linked workflow the document is sent to the next instance for checking. The data are then transferred to the financial accounting system by the last instance.



## 2. HABEL-SCRIPT for post basket

In the Archiving, the retrieval and the post basket there is the possibility to create scripts. These scripts cause, regarding defined criteria, activities / reactions.

Examples:

- Dynamic change of field properties (e.g. fields become mandatory according to other fields)
- Check of field contents and maybe start a coupled activity (e.g. entered character length doesn't match with the requirement or isn't conform to a specific format)

Ask your administrator whether and under what circumstances scripts can be configured and how you can use them.

## 3. HABEL-POST BASKET News

To be notified automatically by email about post basket entries you need the module **HABEL POST BASKET News**. All users are notified via their email address stored in user administration. It does not matter where the post basket entry originates or what type of document is involved. As user you do not need to configure any settings. The notification takes the form of the information: There are new entries in your post basket.

**“Stop improving and you cease to be good!”**

Send your improvement proposals and ideas to [handbuch@habel.de](mailto:handbuch@habel.de). Thank you.

