

User Manual

IV. Administration

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 and handling 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

| Depiction | Meaning |
|---|--|
| <u>HABEL MEMO.plus</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:

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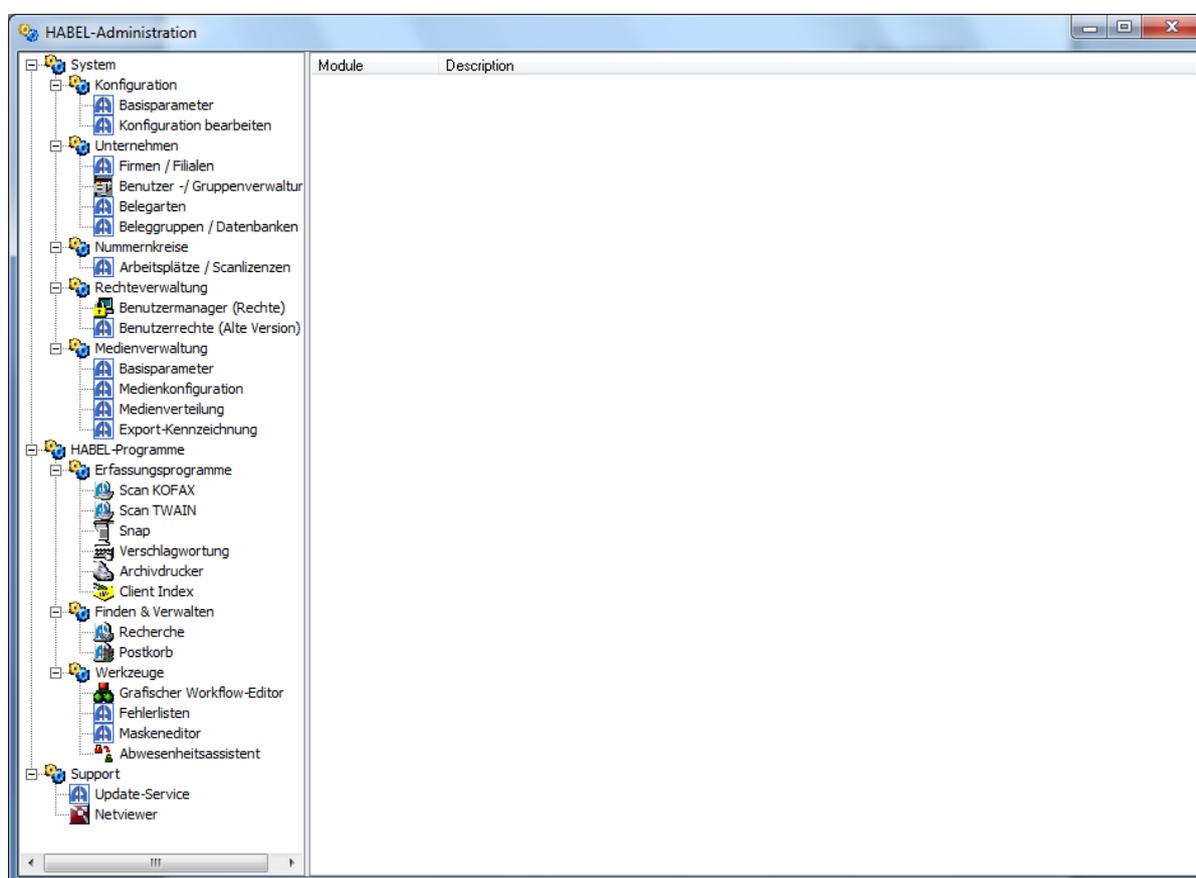
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IV. Administration

HABEL administration

All the important administration programs of HABEL are brought together in a graphical interface. You can access the HABEL administration program via the corresponding icon or execute hphab888.exe in the 32-bit directory.



The HABEL administration includes the programs for defining the companies/branches and document types/sub-document types and the administration of the users and their rights. In addition, programs can be placed in the quick start and called up from here. The structure is developed via an INI file. If a program is called up in the left-hand column, this is normally to be seen and used in the right-hand window of the HABEL administration.

1. Basic parameters



Changes within the basic parameter are only made by HABEL employees!

In the "Basic parameters" section, various basic settings are executed. The award of rights is decisive for changes being permitted. As a fundamental principle, the settings/adjustments of the basic parameters are done by HABEL employees; the administrator has the option here of querying various settings.

Filing structure

Changes in the filing structure are only to be done by HABEL!

There are two filing structures (old + new) in HABEL. With the old filing structure, the documents are placed in a directory; with the new filing structure, the filing of the documents is done in a directory with tree structure.

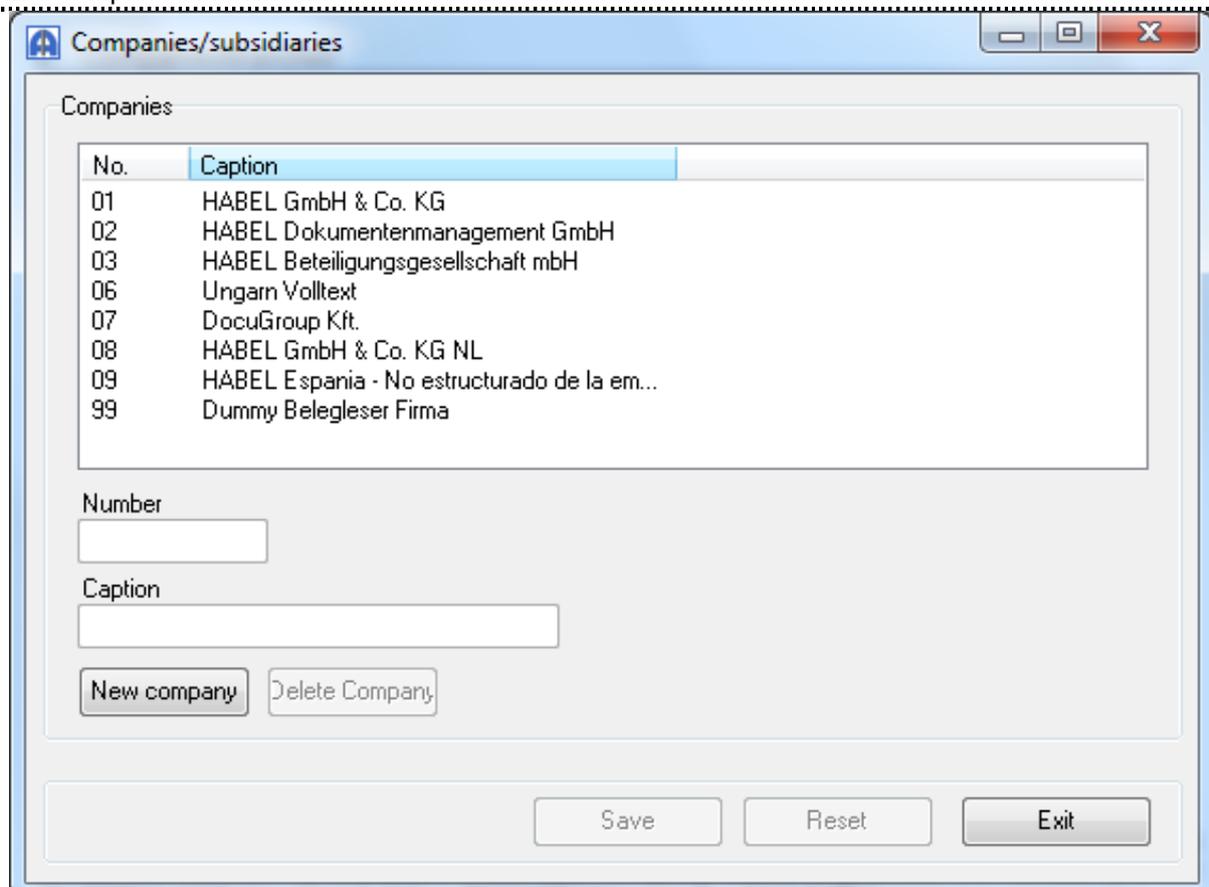
System parameter

Information on character length, use of auto log-in, number of assigned licenses, filing in container, etc.

SQL configuration

Information on the database, server type, etc.

2. Companies/branches



| No. | Caption |
|-----|---|
| 01 | HABEL GmbH & Co. KG |
| 02 | HABEL Dokumentenmanagement GmbH |
| 03 | HABEL Beteiligungsgesellschaft mbH |
| 06 | Ungarn Volltext |
| 07 | DocuGroup Kft. |
| 08 | HABEL GmbH & Co. KG NL |
| 09 | HABEL Espania - No estructurado de la em... |
| 99 | Dummy Belegleser Firma |

Number

Caption

Additional companies/branches can be created here. It is also possible to delete existing companies/branches at this point. If the *New company* button is pressed, the number and the description are to be entered and confirmed by pressing the *Save* button.

3. User/group administration

General

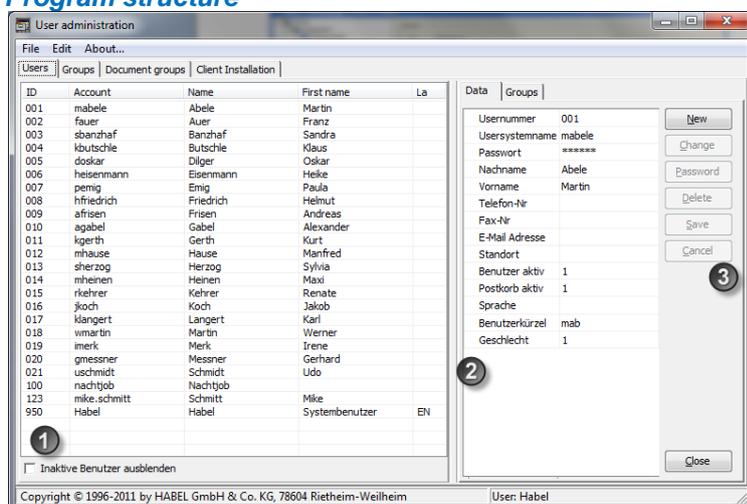
In the user administration, the names of the persons who work with the HABEL system are stored. There, comprehensive access rights of the users for databases, etc. are also stored. In order to be able to assign rights to users, these must be assigned to groups.

Note: Employees who have left the company should be set to inactive. The data for links to workflows and documents thus remain, but access by this user is no longer possible.

The user and document groups are administered in the group administration. Within the user groups, users are brought together who, for instance, are responsible for a department, team or area and thus also have the same or similar access rights and optionally represent post basket recipient groups. Document groups are the merging of document types, for example, according to departments such as financial accounting, HR. Functionalities are also managed via the document groups, such as, for instance, in the retrieval the "Correction" or "Export" functions.

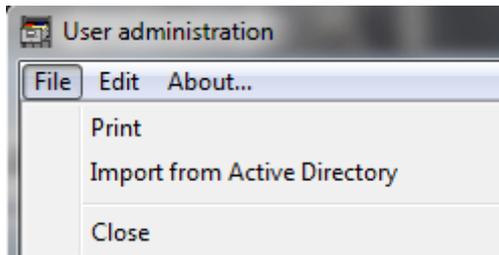
In addition, the administration of the settings for the client installation is done within this application.

Program structure



In the left-hand area, all the created users are displayed (1), the data for these are visible in the right-hand area according to the selected user (2). There, access is possible to the different functions such as "New", "Change", "Password", "Delete", "Save", "Cancel" and "Close" (3).

Menu bar – Symbols



Via the *File* menu, different functions can be reached:

Print

Overview of all users stored in this administration indicating all information entered under the "Data" section.

Import from Active Directory

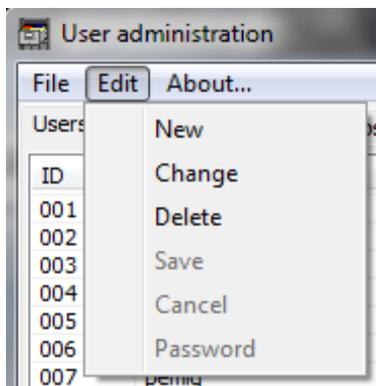
Users can also be adopted from Active Directory. After that, only the allocation of the rights needs to be done and/or the password stored (if required), etc.

Close

Quits the program. For this, the button "Close" in the right-hand section of the mask can be used or the window closed via "X".



In the *Edit* menu, different functions can be reached (also available as buttons in the right-hand section of the mask):



New

Creation of new users

Change

Change of the selected user. In "Change mode", the three additional commands "Save", "Cancel" and "Password" become active for selection.

Delete

Deletion of the selected user.

User administration

To create a new user, select the "New" command.

| Data | | Groups |
|----------------|---|--------|
| Usernummer | | |
| Usersystemname | | |
| Passwort | | |
| Nachname | | |
| Vorname | | |
| Telefon-Nr | | |
| Fax-Nr | | |
| E-Mail Adresse | | |
| Standort | | |
| Benutzer aktiv | 1 | |
| Postkorb aktiv | 1 | |
| Sprache | | |
| Benutzerkürzel | | |
| Geschlecht | | |

Buttons: New, Change, Password, Delete, Save, Cancel, Close

Please assign

User number
freely definable, three-digit, unique, numerical

User system name
corresponds to the log-in name for the registration of the HABEL applications. Requirement for the auto log-in: Windows user name

other personal data
are optional

E-mail address
If an e-mail address is entered, this user can also be defined as the recipient of the Autojob log

The following fields are pre-defined

User active

not highlighted means that the user is not active (no usage of HABEL applications possible). Inactive users can be hidden in the overview.

| V.Nr | M.Nr | M.Nr | M.Nr | | |
|------|--------------|----------|----------------|----|--|
| 020 | qmessner | Messner | Gerhard | | |
| 021 | uschmidt | Schmidt | Udo | | |
| 100 | nachtjob | Nachtjob | | | |
| 123 | mike.schmitt | Schmitt | Mike | | |
| 950 | Habel | Habel | Systembenutzer | EN | |

Buttons: Inaktive Benutzer ausblenden, Close

Copyright © 1996-2011 by HABEL GmbH & Co. KG, 78604 Rietheim-Weilheim | User: Habel

Post basket active

not highlighted means that the user cannot use any post basket and is thus not available as a recipient of a post basket.

Language

Definition in what language the system interface is available to the user

Please allocate a password. This can be changed by the user in the registration window by clicking on the key symbol. If the auto log-in is in use and the user system name (log-in name) corresponds to the log-in name of the computer, you can work with HABEL without having to tab anew each time.

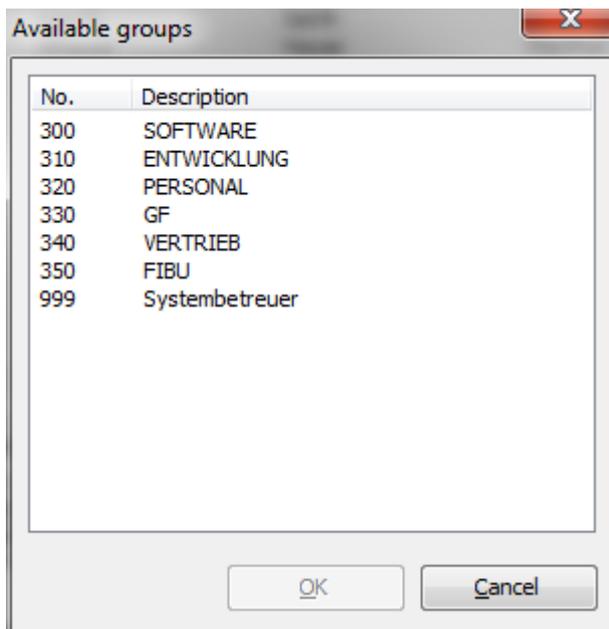
If the module **HABEL_AUTO_LOG-OFF** exists on your system, the settings for this can be carried out in the "Data" section. The respective user is logged out automatically after a defined time of "non-use" of the retrieval. This means license access points become free again. This is expedient because the access licenses are competing licenses that can be effectively managed with the auto log-off.

It can also be defined for certain users that these are excluded from the auto log-off rule if 0 is entered in the field.

Note: The entry has the unit "minutes".

| | |
|-------------------|--------------------------|
| Sprache | Deutsch |
| LogOff | 0 |
| Email PK-Mailinfo | <input type="checkbox"/> |

When you create new users, the document group allocation opens automatically after activation of the "Save" button.



You should select one or more group(s) for this new user here in which he or she then becomes a member. Based on this user group, the first rights that the user will have are assigned. If no user group or a user group that has not received any rights assigned to it is selected, the user may have full rights!

Users that are already created can be subsequently assigned to other groups ("Groups" tab).

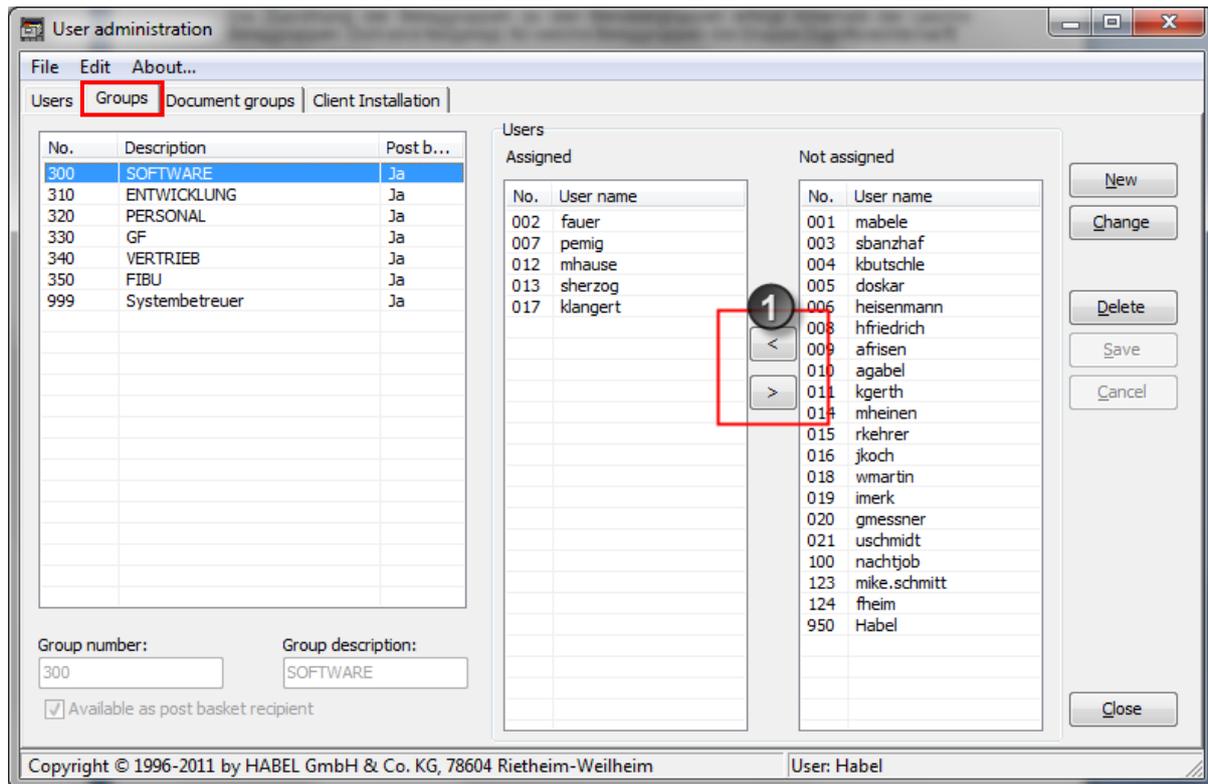
| No. | Description |
|-----|-------------|
| 310 | ENTWICKLUNG |

Via the "Add" button, the user can become a member of other groups, and via "Delete" excluded as a member of groups accordingly.

Note: No changes to the groups are made in this mask but rather to the membership of the selected user in these groups.

User administration

The administration of the groups is to be done within the user/group administration tab groups



Here, it is depicted in a clearly structured manner which groups exist and which users are assigned to which groups. At this point, an allocation and/or removal to/from a group can be carried out by clicking on the arrows (1).

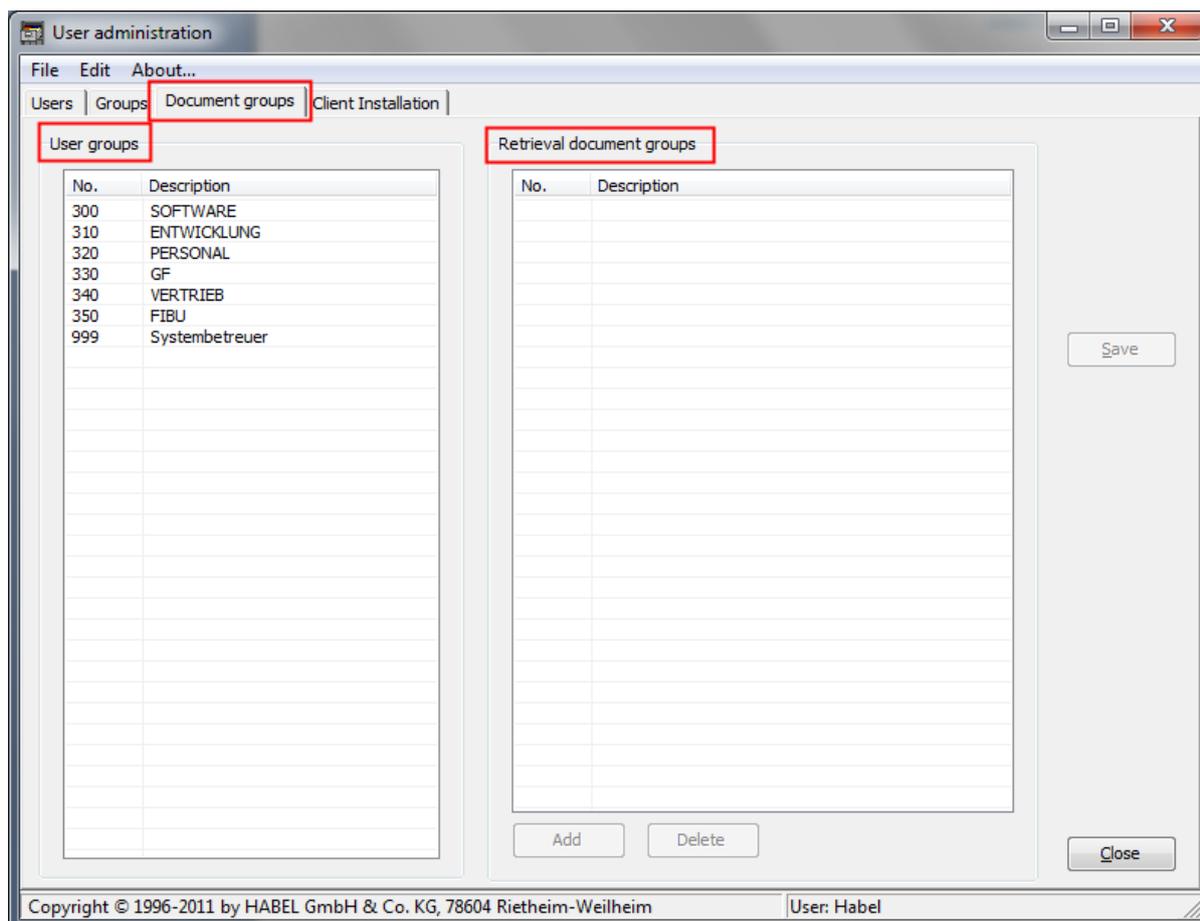
New groups can be created via the *New* button. *Changes* and the *Deletion* of the groups are also possible. If the *New* button is clicked, the "Group number", "Group description" and "Available as post basket recipient" fields are emptied. These are to be supplemented and confirmed by pressing the button *Save* as a new group.



If groups are deleted and this means that users are no longer assigned to a group, these acquire full rights if no rights are defined at user level. Consequently, it must therefore be checked before deleting groups which user is assigned to this group and whether he or she is a member of other groups.

Document groups

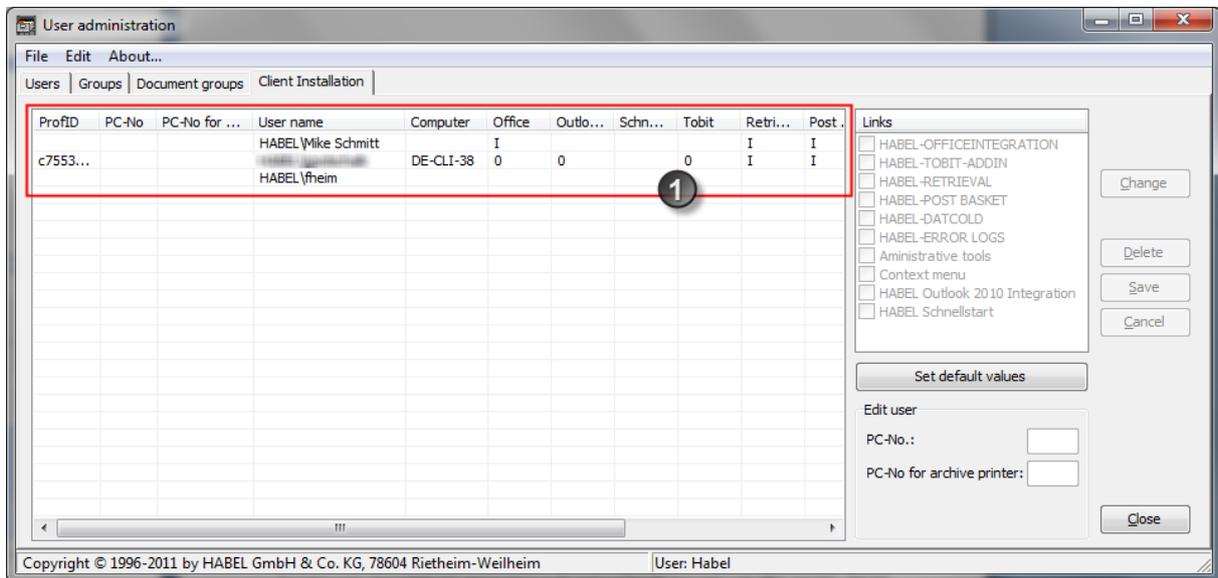
The allocation of the document groups to the user groups is done within the "Document groups" tab. There it is defined for which document groups the group has access rights.



The administration of the document groups is done within the "Document groups / Databases" menu item, which is also integrated in the HABEL administration. Details on this are described later on.

Client installation

The client installation is used for the uniform and rapid set-up of workstations. Settings for the client installation are carried out within the user/group administration. New users can be incorporated via the import from Active Directory into the administration or by carrying out the program hphab859 (client installation) at the respective workstation. This procedure is described in the chapter *Client installation*.

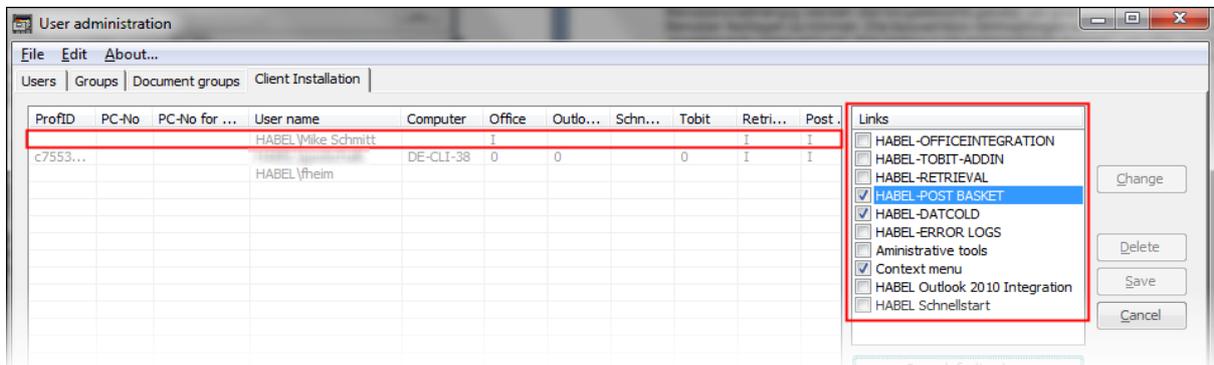


In the administration, the users / workstations created are depicted as an overview (1). In addition to the profile ID, the assigned PC no. and PC no. for the archive print, and the user name are also stored. In addition, the overview includes the links and programs that are assigned to this user.

Explanation of the flags

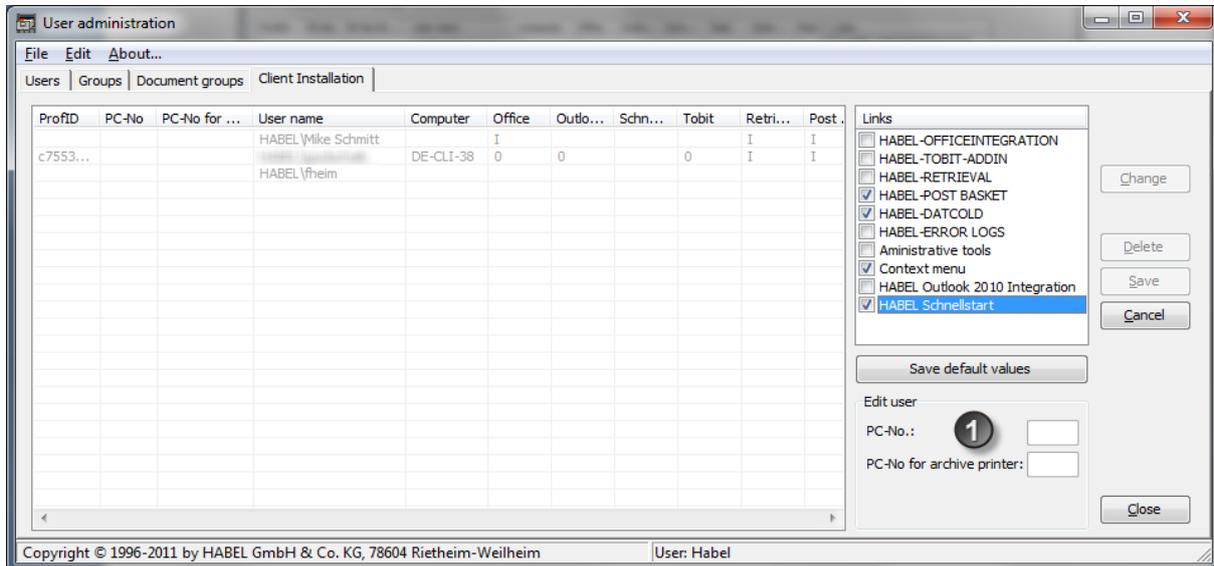
| | |
|---|--|
| i | Uninstallation/installation will be done during the next start |
| 0 | Not installed / no installation necessary |
| 1 | Has been successfully installed |
| U | Uninstallation is being carried out |

Changes to the links can be done per user with the *Change* button. The *Links* selection box becomes active and is available for the extension or reduction of the assigned links.



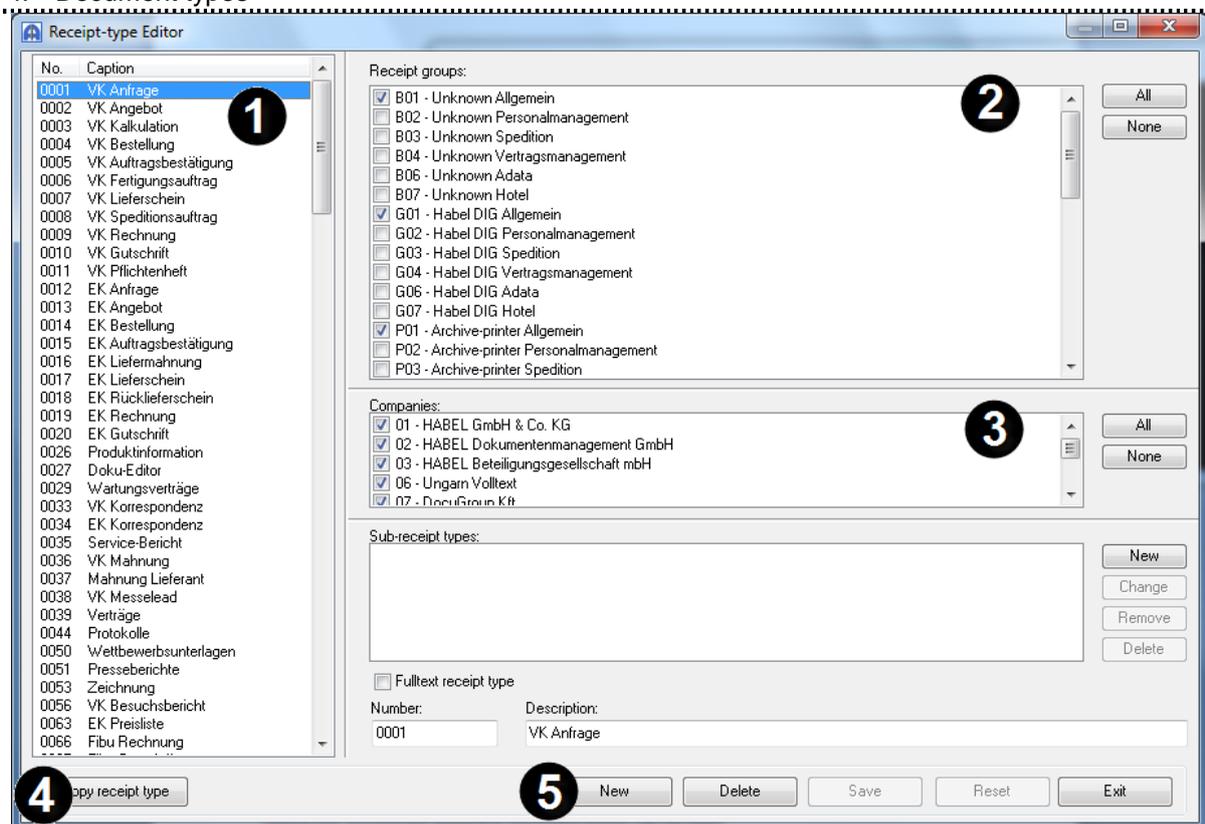
In our example, the "Office" and "Retrieval" links are uninstalled (U) during the next start and the post basket reinstalled (I) for the user HABELMike Schmitt. Each further application that is selected is available after activation of the "Save" button for the installation during the next start. The column then also contains the flag I.

Depending on the user, the default values are set in order to be able to define the fundamental setting for new users. The *Links* selection box is activated by pressing the *Set default values* button. Here, the corresponding selection can now be made which is seen as a basic setting for future users. With *Save default values*, the setting is adopted.



The PC number and the PC number for archive printers must be different **(1)**. These numbers are used to issue the names of archive files. If a computer number was not issued, the user will be automatically assigned a free computer number the next time a HABEL data entry program starts. "PC no. for archive printer" is required when two HABEL data entry programs have to be opened simultaneously such as the scanning program and archive printer.

4. Document types



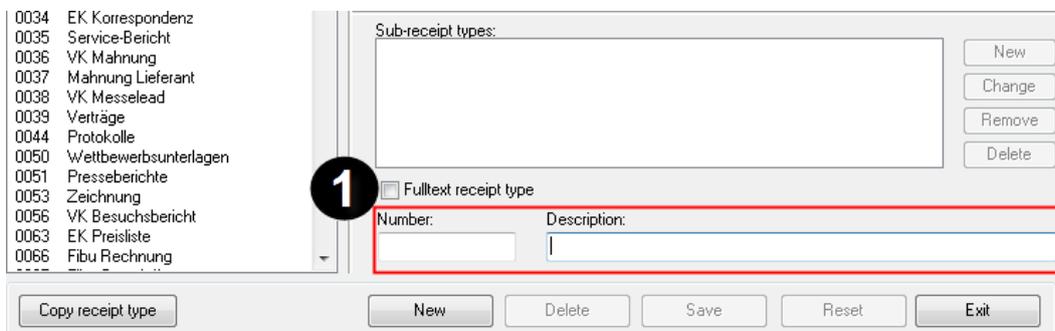
New document types (1) can be created and also assigned to the respective document groups (2) and clients (3). In our case, the SLS Enquiry with the document type key 0001 is assigned to the document groups HABEL DIG General, Archive Printer General and General. This means that the document type is available in original format in the keywording and for selection for the archive print, and is also visible within the retrieval. The allocation to the clients defines in which clients this document type (taking into account the respective document group) can be used.

Via the *All* / *None* icons, a rapid selection and/or a prompt deactivation of the document groups and client allocation can be done.

In order to create a new document type, existing document types can firstly be accessed and these copied (4) or a corresponding mask can be called up via the *New* button (5).

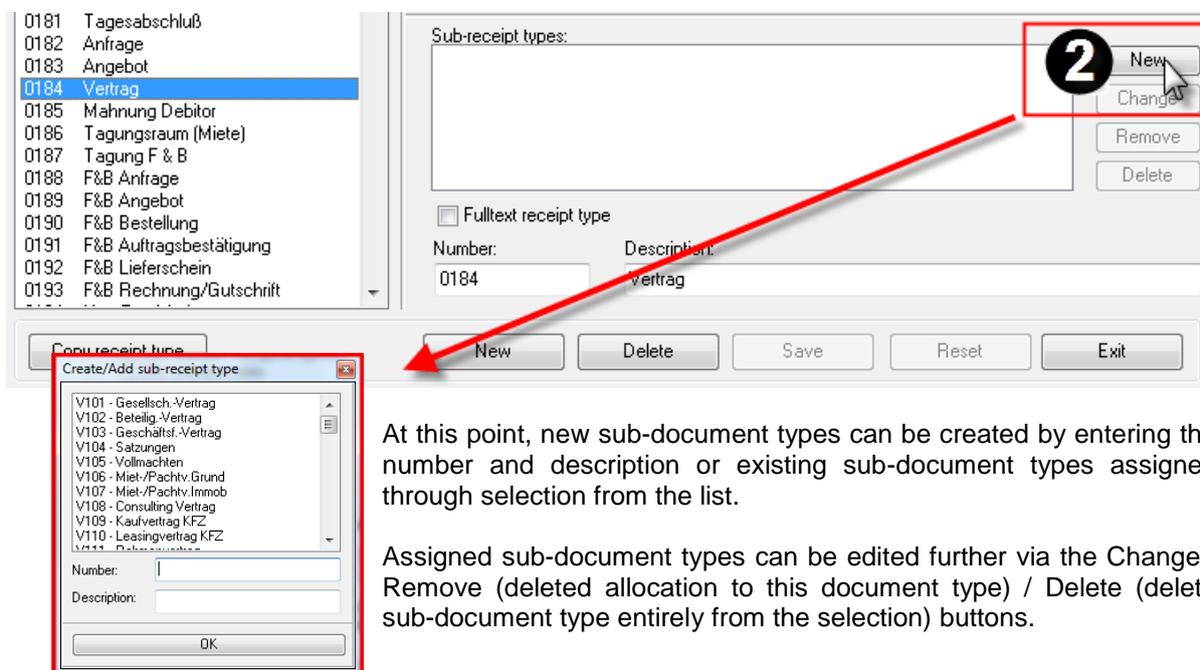


For the document types created in this way, further settings need to be carried out with regard to the masks and rights. The administrator training at HABEL is to be attended and/or the HABEL mask configuration used for this purpose.



If a document type is selected and the button *Copy document type pressed*, the mask only changes to the extent that the description is emptied. The corresponding information (description and number) is to be entered here and the new document type is to be saved. During this process, it can e.g. also be defined whether the document type is to be a full-text document type (1). This is implemented by ticking the field. With existing document types, the document type for full-text document type can be changed by ticking the field (note: already archived documents, however, will not be full-text recognized subsequently).

Sub-document types cannot be assigned until after the new document type has been saved. The *New* button (2) becomes active as soon as the new/existing document type is clicked in the selection of the document type.



At this point, new sub-document types can be created by entering the number and description or existing sub-document types assigned through selection from the list.

Assigned sub-document types can be edited further via the *Change* / *Remove* (deleted allocation to this document type) / *Delete* (delete sub-document type entirely from the selection) buttons.

The creation of new document types is done in a similar manner to the copying of document types – but via the *New* button. After the button has been pressed, document group and client allocation as well as the name and number are emptied. The data for the new document type can be entered and the document type created.

The deletion of individual document types is also possible in this program. Firstly, the document type has to be selected and removed from the database by *Delete*.

0181 Tagesabschluß
0182 Anfrage
0183 Angebot
0184 Vertrag
0185 Mahnung Debitor
0186 Tagungsraum (Miete)
0187 Tagung F & B
0188 F&B Anfrage
0189 F&B Angebot
0190 F&B Bestellung
0191 F&B Auftragsbestätigung
0192 F&B Lieferschein
0193 F&B Rechnung/Gutschrift

Sub-receipt types:

Fulltext receipt type

Number: 0184 Description: Vertrag

Buttons: Copy receipt type, New, Delete, Save, Reset, Exit



The deletion of the document type does not result in the deletion of the entries. These remain in the database.



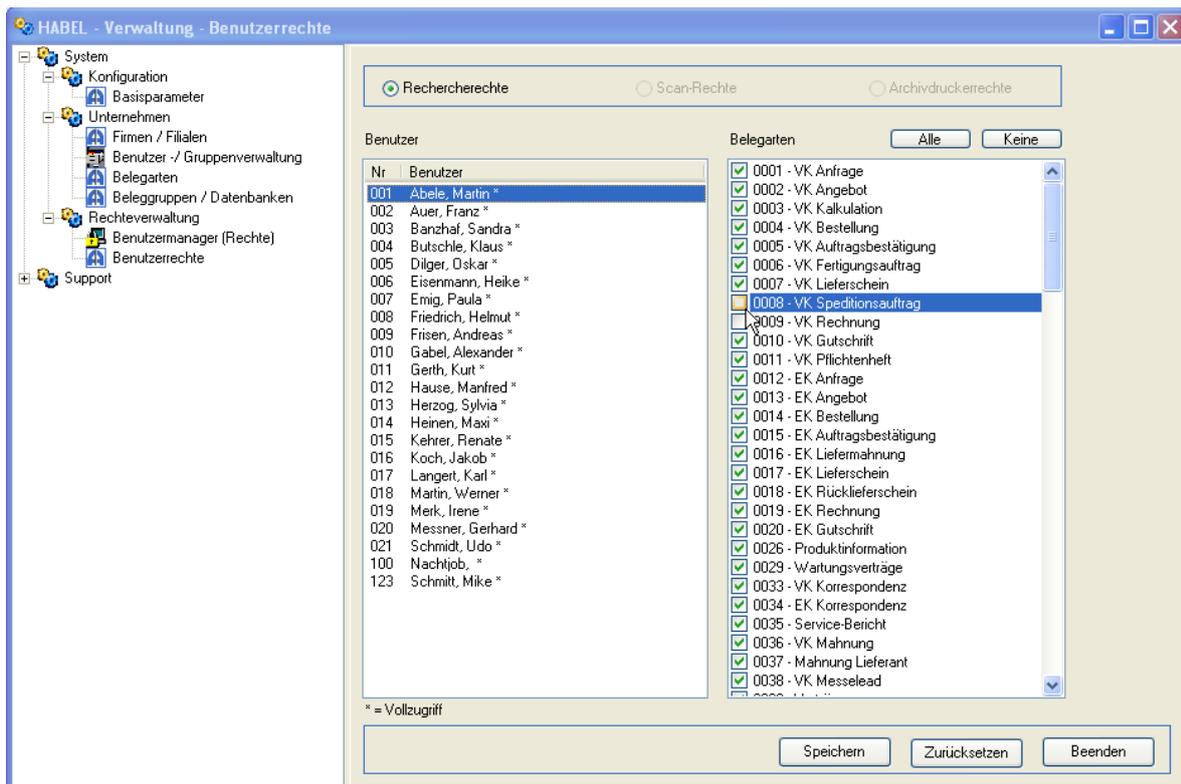
With "Close", only the document type administration is closed; the HABEL administration continues to be opened for the use of other functions.

5. User manager

See detailed information in the chapter *User manager*

6. User rights

Within the user rights, the setting is created whether the user has the right to see or archive the type of document. Detailed rights cannot be assigned within this administration; for this, the **HABEL USER MANAGER** is used.



Client installation

The program hphab859, the client installation, is available for the prompt and uniform installation and maintenance of workstations. The requirement is that with systems that were installed before 2009, a corresponding changeover of the existing client installation to the new option has been done. It is also conceivable to operate the existing and new client installation in parallel, but at this point reference is made to the fact that "older" workstations then have to be maintained manually. The following information only applies in conjunction with the new client installation.



If a drive letter was set up to access HABEL, you should use it to start the installation program HPHAB859.EXE. Alternatively you can use an UNC path such as \\habel-server\habel\gedosod\32-bit\hphab859.exe.



HABEL workplace installation is divided into three program parts that must be globally installed on the workplace:

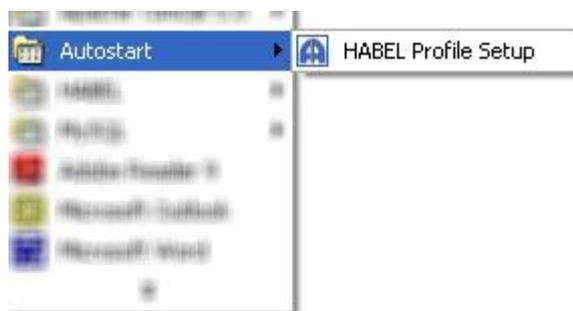
- Profile update
- Archive printer driver
- Outlook interface

1. Installing the profile update

When installing the profile update, the program "HABEL Profile Setup" (HPHAB854.EXE) is added to the workplace's system-wide autostart menu.



"HABEL Profile Setup" checks which HABEL program links should be available for the logged-on user. The "user administration" program is used for administration.



If the HABEL user is new, the user must first be created using the program "HABEL user administration".

After the user has been created using the "user administration" program, a new entry is saved automatically for this user in the "Client Installation" tab. The user name consists of both the domain and Windows user name. In HABEL, the Windows user name is also termed the "User system name". Details on this are described in the chapter "HABEL administration" at the start of the manual.

| ProfID | PC-No | PC-No for archive prin... | User name | Computer | Office | Outlo... | Schn... | Tobit |
|--------|-------|---------------------------|--------------------|----------|--------|----------|---------|-------|
| | | | HABEL\Mike Schmitt | | I | | | |
| | | | HABEL\ | | | | | |



If the corresponding entry is not in the list, manually execute "HABEL Profile Setup" (HPHAB854.EXE) on the workstation. The program automatically generates a new entry for the corresponding user. The program can be found under Start → Programs → Autostart.

2. Setting up the links

When you start the "HABEL Profile Setup", the program checks if there is already an entry in the "Client Installation" for the logged-in user. If there is no entry, one is automatically created, and the profile ID (**G**lobally **U**nique **I**dentifier) is automatically entered. HABEL identifies the logged-in user using the profile ID.

| ProfID | PC-Nr. | PC-Nr. für Archivdrucker | Benutzername | Office | Rech... | Postk... | DATC... | Verwa... | Konte... |
|----------------------------------|--------|--------------------------|--------------------------|--------|---------|----------|---------|----------|----------|
| 3494404b73a84167b617befebddd7221 | 2 | | SYSTEM3\kop | 1 | 1 | 0 | 0 | 1 | 0 |
| 7bebfc37998f4677a3593db15c98080b | 3 | | SYSTEM3\vasch | 0 | 1 | 0 | 0 | 0 | 0 |
| 8e7b989648ae4f39bec5a6248a406116 | 4 | | SYSTEM3\bluit | 0 | 1 | 0 | 0 | 0 | 1 |
| 63462fb1c1fd4830b967bc5b5be0480f | | | VM-ADMINSCH\mike.schmitt | 1 | 1 | 1 | 1 | 0 | 1 |

In Control Panel → Software, an uninstallation routine "HABEL Client" is generated if it does not yet exist.

"HABEL Profile Setup" continues to check which links should be available for the logged-in user. The corresponding links such as retrieval, post basket, etc. are automatically placed on the desktop and start menu (or removed if necessary) for the logged-in user.



Functions such as the expansion of the pull-down menu with "Archive (HABEL)", HABEL Office Integration and the e-mail archiving from TOBIT are installed or removed if necessary.

Depending on which version of Microsoft Office is used, the function buttons are provided in the Office programs. The Office integration can be used for Microsoft Office 2000 to 2007.



A standard Windows user is not authorized to remove the program "HABEL Profile Setup" from the system-wide autostart menu.

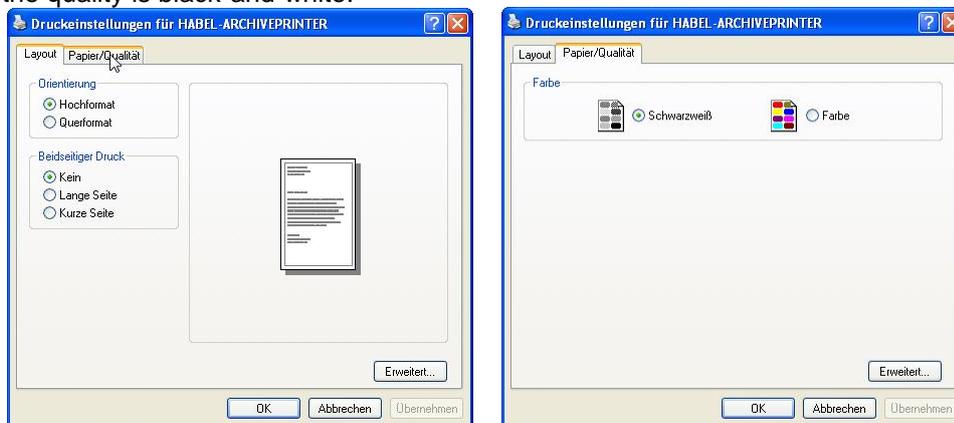
The required links can also be manually set up using the program hphab857. You can get help with the call parameters by starting the program hphab857.exe in a DOS prompt.

3. Installing the archive printer driver

Installing the archive printer driver adds a local printer "HABEL archive printer" to the workstation. This printer allows you to archive documents in HABEL from a wide range of applications.



Each user can change the layout, paper and quality settings using the printer settings. The default for the quality is black-and-white.



4. Installing the Outlook interface

The installation routine adds an add-in to Microsoft Outlook that is supported for Microsoft Outlook 2000 to 2007.

By installing the Outlook interface, three function buttons are added to the user-based e-mail archiving in Outlook. Outlook 2000 to 2007 is supported starting with the Windows 2000 operating system.



5. Uninstalling the HABEL workstation installation



You need local administrator rights to uninstall a workstation. Close all open programs before you start with the installation.

Uninstalling the links

Start the "HABEL user administration" program, and select the user entry to be deleted in the "Client installation" tab. The following options exist for deleting the entry:

- Right click → Delete
- Edit menu → Delete
- Delete button
- Or press the "DEL" key

Then go to Control Panel → Software. Select the entry "HABEL Client (logged in user)" and uninstall it.

Uninstalling the "HABEL Profile Setup"

To uninstall the "HABEL Profile Setup", delete the corresponding entry in the system-wide autostart menu, such as C:\Documents and settings\All Users\Start menu\Programs\Autostart\HPHAB854.EXE

In addition, check the following entries in the registry:

- HKEY_CURRENT_USER\Software\Microsoft\Windows\CurrentVersion\Run
- HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Windows\CurrentVersion\Run

Archive printer

It is sufficient to delete the printer "HABEL archive printer" as a user with local administration rights.

Outlook interface

Go to Control Panel → software. Select the entry "HABEL Outlook Add-In" and uninstall it.

Office integration

Go to Control Panel → software. Select the entry "HABEL Office Add-In" and uninstall it.

HABEL USER MANAGER

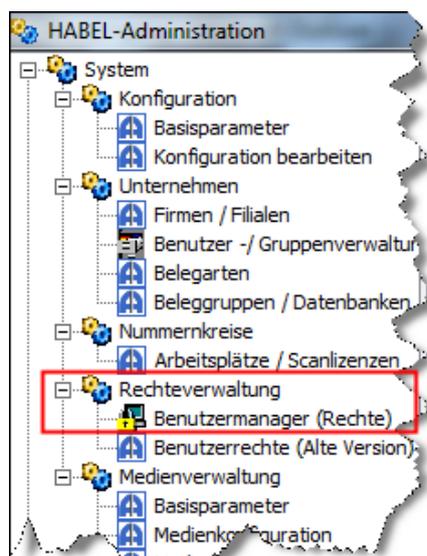
1. General

You have granted higher-level rights (access to document groups) to the users created in the user administration through the allocation to user and document groups in the document group administration. The HABEL USER MANAGER enables you to control the access rights of users down to field level. Within the HABEL USER MANAGER you can assign rights for groups and/or single users, and therefore protect the entire archive from unauthorized access.



You can access the HABEL USER MANAGER via the button or by selecting the program hdnab881. If you have the HABEL administration in use, you can access the program directly from there.

Usermanager



In general:

- 1) If there are no rights assigned to the user, he or she will be fully authorized! The moment you define at least one authorization, the user can only use the assigned rights. Exception: HABEL can set up system-wide access protection, i.e. users have no access to HABEL until the corresponding authorizations have been assigned.
- 2) An assigned right cannot be abrogated by another right. This means, for example, that if a right is assigned to a single user, the right will not be abrogated because the user is a member of a user group for which the same right was not assigned.
- 3) All positions of an archived document are checked for rights and not just the first position.

Example 1



User level
No defined rights



Group system administrator
No defined rights

→ Result: Full right

Example 2



User level
No defined rights



Group system administrator
No defined rights

→ Result: **Full right**

Example 3



User level
No defined rights



- Group Sales
- Execute program
 - Search "Database general"
 - Display
 - Export
 - Information
 - Print

→ Result:

- Execute program
- Search "Database general"
- Display
- Export
- Information
- Print

Example 4



User level
Execute program



Group system administrator
No defined rights



- Group Sales
- Execute program
 - Search "Database general"
 - Display
 - Export
 - Information
 - Print

→ Result:

- Execute program (via user)
- Search "Database general" (via Sales Group)
- Display
- Export
- Information
- Print

Example 5



User level
No defined rights



- Group system administrator
- Execute program
 - Search "Database general"

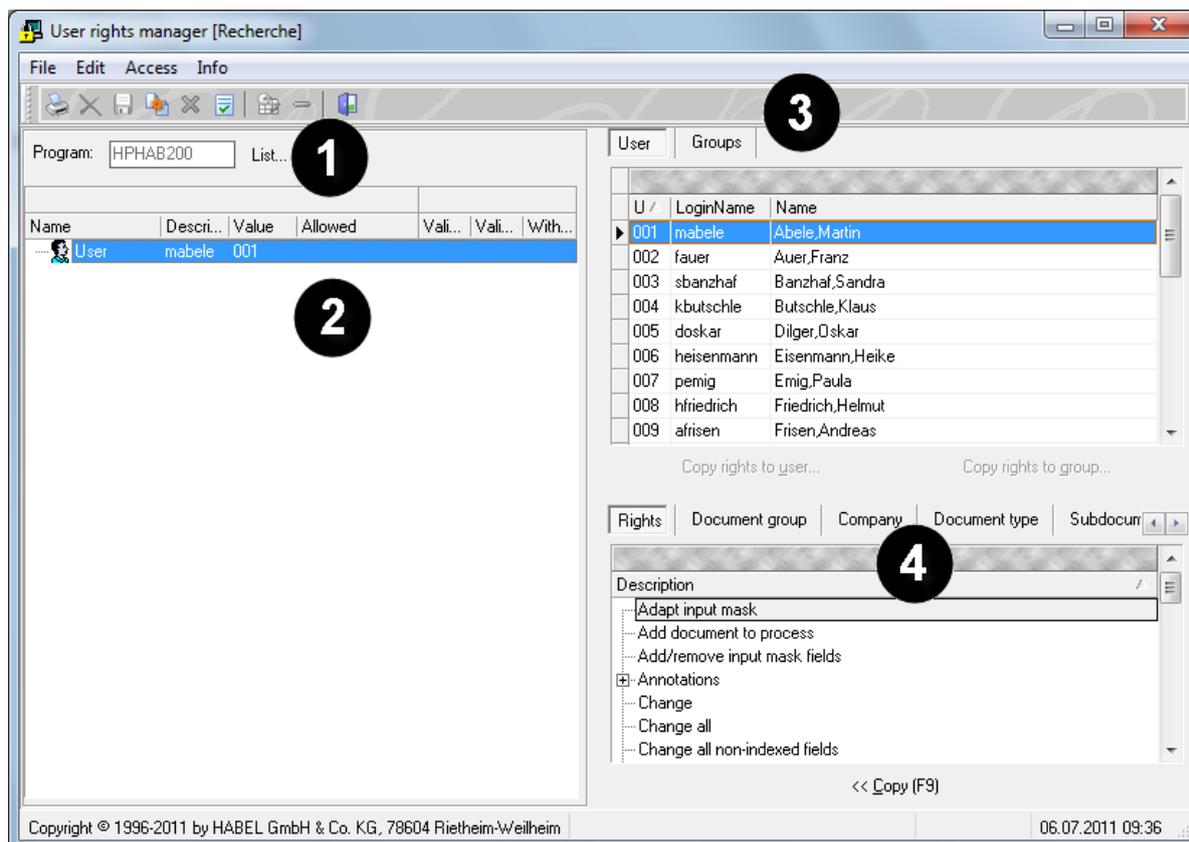


Group Sales
No defined rights

→ Result:

- Execute program (via user)
- Search "Database general"

2. Program structure

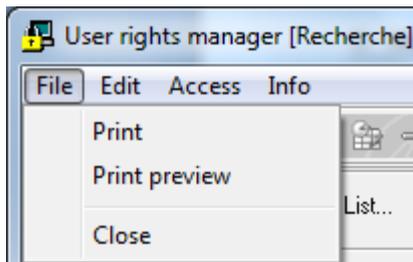


| | |
|---|--|
| ① | Selection of the program for which you are assigning rights to the respective user/group |
| ② | Display of the selected user and the assigned rights (tree structure) |
| ③ | Selection of the users and/or groups |
| ④ | Administration of the rights down to the level of the individual database field |

Please note that you must assign rights to the users for each program (retrieval, data entry, post basket)! Due to different functions or the existence of additional functions, it would not be expedient for the rights stored in the program to be transferred to other programs.

3. Menu bar – Symbols

Within the "File" menu, various functions are available:

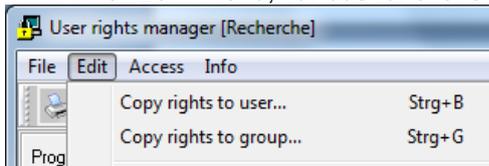


Print (symbol bar )
Overview of the rights of the selected user is printed out

Print preview
Preview of the print

Close (symbol bar )
Quits the program

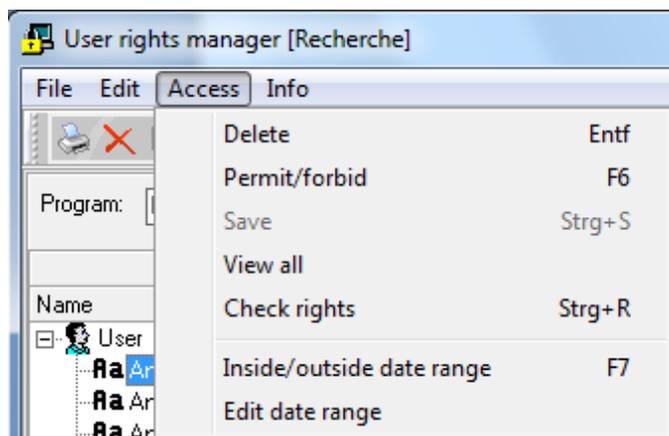
Within the "Edit" menu, various functions are available:



Copy rights to user (CTRL+B)
Assigned rights can be copied to other users

Copy rights to group (CTRL+G)
Assigned rights can be copied to groups

Within the "Access" menu, various functions are available:



The commands Delete, Permit/Forbid, Inside /outside date range and Edit date range are available as soon as a right has been selected within the user/group. You can save the settings as soon as you have made changes to the rights.

Delete (symbol bar )

If you want to delete assigned rights for a user / a group, select the right in the left-hand area and delete this via menu access or the Del key.

Permit/Forbid (F6) (symbol bar  )

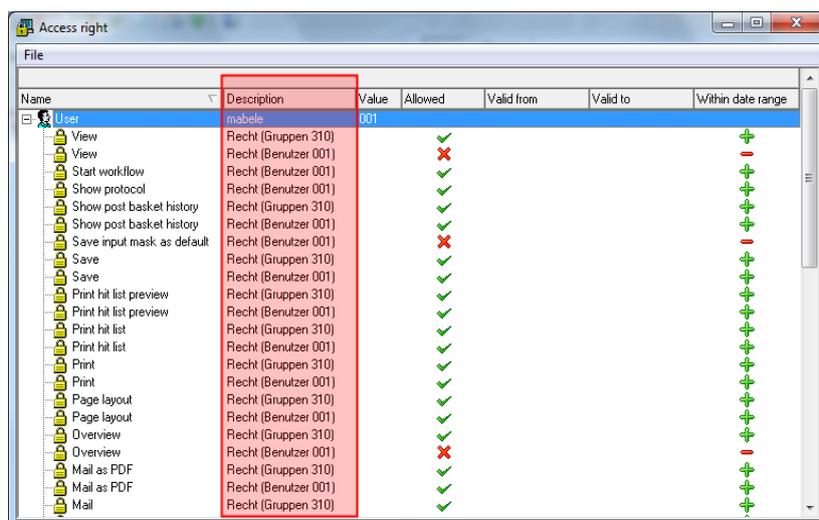
If a right is assigned and is marked as forbidden (symbol ) , the opposite applies for the user. For example, the Display right is assigned for documents for which the field "Subject" is filled with "Complaint". If this right is then inverted with "Forbid", the user may see everything except for the documents for which the "Subject" is filled with "Complaint". With this function, for instance, assigned rights for a user can be temporarily deactivated without deleting these from the rights tree. The command can be reached via menu access (alternatively functional key F6).

Save (CTRL + S) (symbol bar )

Changes carried out are to be saved.

Complete display (symbol bar )

With this menu item, you gain a complete overview of the user selected and his/her assigned rights (from user allocation but also from group allocation). Under the "Name" column, you can see the origin of the right in each case.

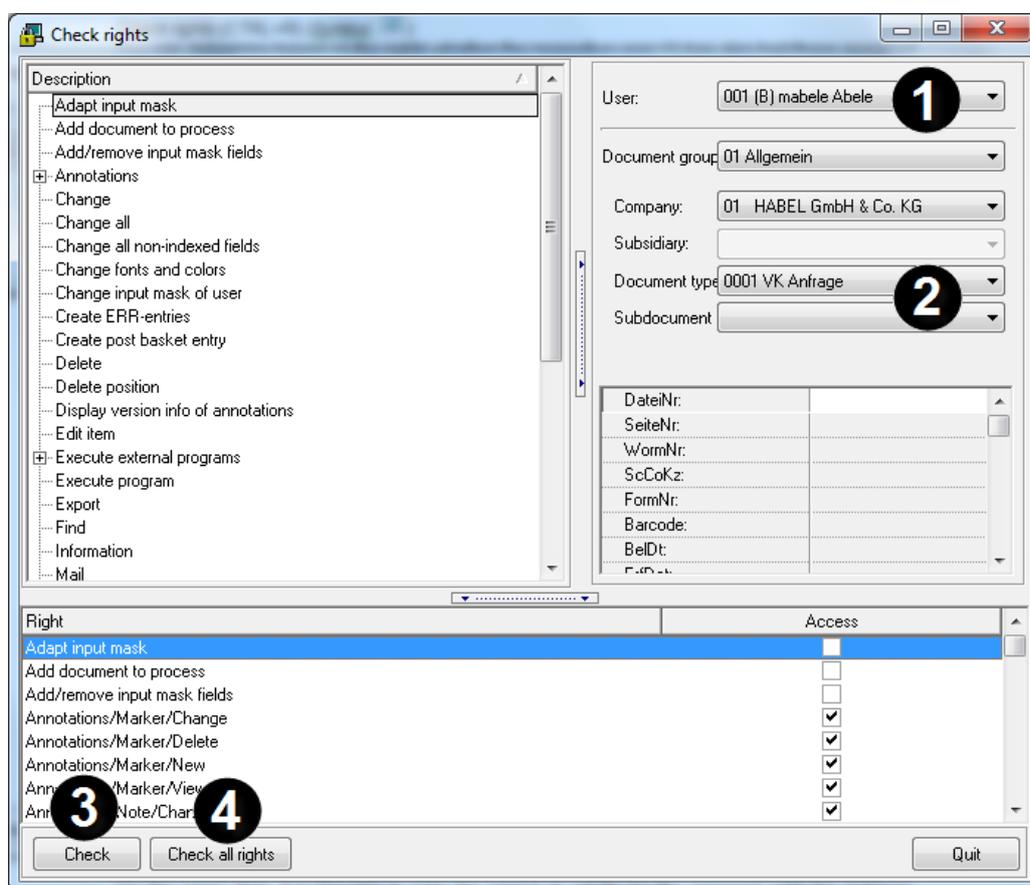


| Name | Description | Value | Allowed | Valid from | Valid to | Within date range |
|----------------------------|---------------------|-------|---------|------------|----------|-------------------|
| User | mabele | 001 | | | | |
| View | Rech (Gruppen 310) | | ✓ | | | + |
| View | Rech (Benutzer 001) | | ✗ | | | - |
| Start workflow | Rech (Benutzer 001) | | ✓ | | | + |
| Show protocol | Rech (Benutzer 001) | | ✓ | | | + |
| Show post basket history | Rech (Gruppen 310) | | ✓ | | | + |
| Show post basket history | Rech (Benutzer 001) | | ✓ | | | + |
| Save input mask as default | Rech (Benutzer 001) | | ✗ | | | - |
| Save | Rech (Gruppen 310) | | ✓ | | | + |
| Save | Rech (Benutzer 001) | | ✓ | | | + |
| Print hit list preview | Rech (Gruppen 310) | | ✓ | | | + |
| Print hit list preview | Rech (Benutzer 001) | | ✓ | | | + |
| Print hit list | Rech (Gruppen 310) | | ✓ | | | + |
| Print hit list | Rech (Benutzer 001) | | ✓ | | | + |
| Print | Rech (Gruppen 310) | | ✓ | | | + |
| Print | Rech (Benutzer 001) | | ✓ | | | + |
| Page layout | Rech (Gruppen 310) | | ✓ | | | + |
| Page layout | Rech (Benutzer 001) | | ✓ | | | + |
| Overview | Rech (Gruppen 310) | | ✓ | | | + |
| Overview | Rech (Benutzer 001) | | ✗ | | | - |
| Mail as PDF | Rech (Gruppen 310) | | ✓ | | | + |
| Mail as PDF | Rech (Benutzer 001) | | ✓ | | | + |
| Mail | Rech (Gruppen 310) | | ✓ | | | + |

Note: Each element is assessed individually. For instance, the "Find" right is assigned to several groups. Within the first group, a document type is excluded for the search (e.g. correspondence), which means that everything may be looked for apart from the document type "Correspondence". In the second group, the search for just a document type (e.g. applications) is explicitly approved, which means that no document type apart from this may be searched. If the rights of these two groups are taken together, the user would only be able to search according to the document type "Applications" as one right is assigned, according to which the others are sorted out.

Check rights (CTRL+R) (Symbol )

You can determine based on the rights whether the respective user (1) has also had these assigned too. You either select the individual rights and check whether the user has access (2) to this function by activating the "Check" button (3). Alternatively, you can call up a complete overview of all rights with display (access yes/no) regarding the respective user via the "Check all rights" button (4). The selection of the assigned rights can be restricted to document groups, companies, branch, document type, sub-document type, etc.



Inside/Outside date range (F7) (symbol bar  )

It would thus already be possible to define today in what time range the right for an employ should apply (e.g. he or she may only use the function on a particular day (in the date range) or if applicable also vice versa: not use (outside of the date range)).

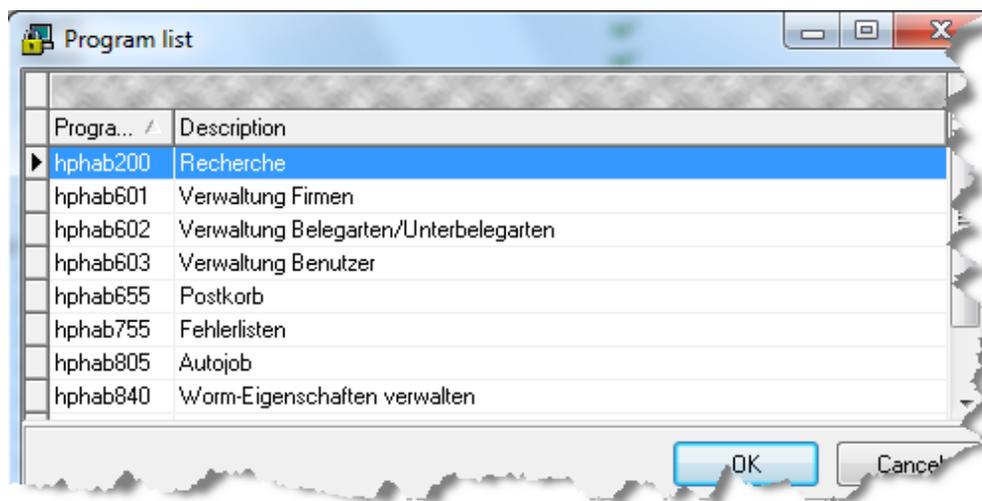
Edit date range (symbol bar )

Via this menu item, it is possible to enter the period of validity for the assigned right (for instance, activities over a certain period of time).

4. Rights management

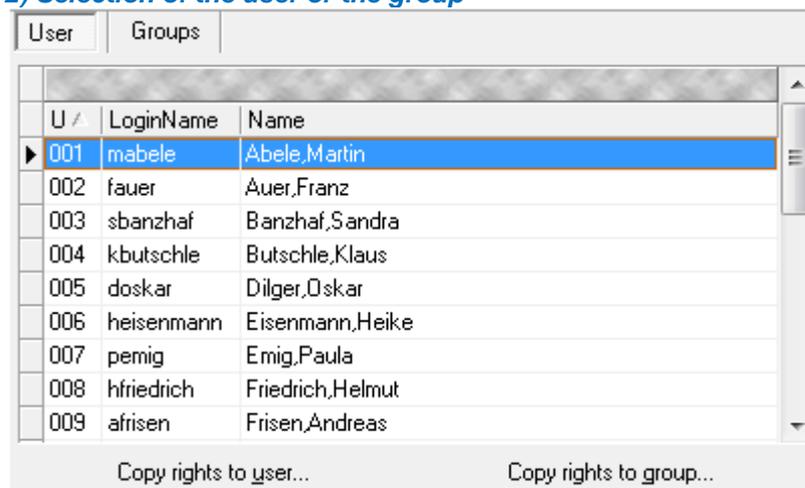
In order to assign rights to the users or groups, the following steps are required:

1) Selection of the program via the "List" button



You will receive a program list for the selection of the program (program name and description of what is behind this program name).

2) Selection of the user or the group



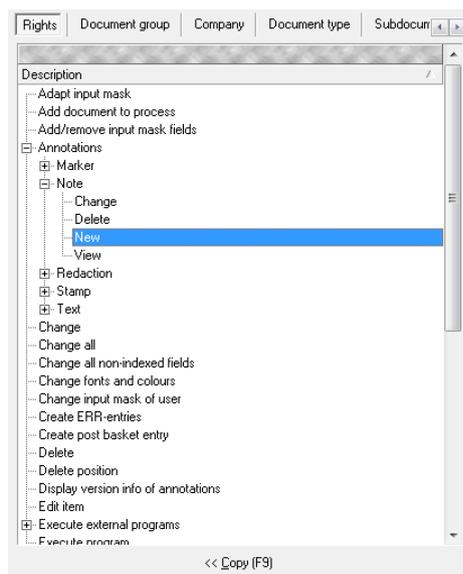
3) Assign rights

After you have selected the user, you ensured that this is marked as selected in the left-hand overview window.

| Name | Description | Value | Allowed | Valid from | Valid to | Within date range |
|---------------------------|-------------|-------|---------|------------|----------|-------------------|
| User | mabele | 001 | | | | |
| Change input mask of user | Recht | | ✗ | | | ⊖ |
| Create post basket entry | Recht | | ✓ | | | ⊕ |
| Change | Recht | | ✓ | | | ⊕ |

You can now assign the desired rights on the right. For this, always move from tab to tab (from left to right). If you have selected an allocation that cannot be allocated in this way, the "Copy" button does not become active. Please note that on the left the right directly "above it" must always be marked in order to be able to also assign the next level below it.

Note: The user requires the "Find" right in order to be able to search at all and also be able to receive other rights such as e.g. attach note, print, etc. Display is important in order to be able to have the hits displayed as a document (also in relation to the document preview). Care should therefore be taken that these rights are assigned.

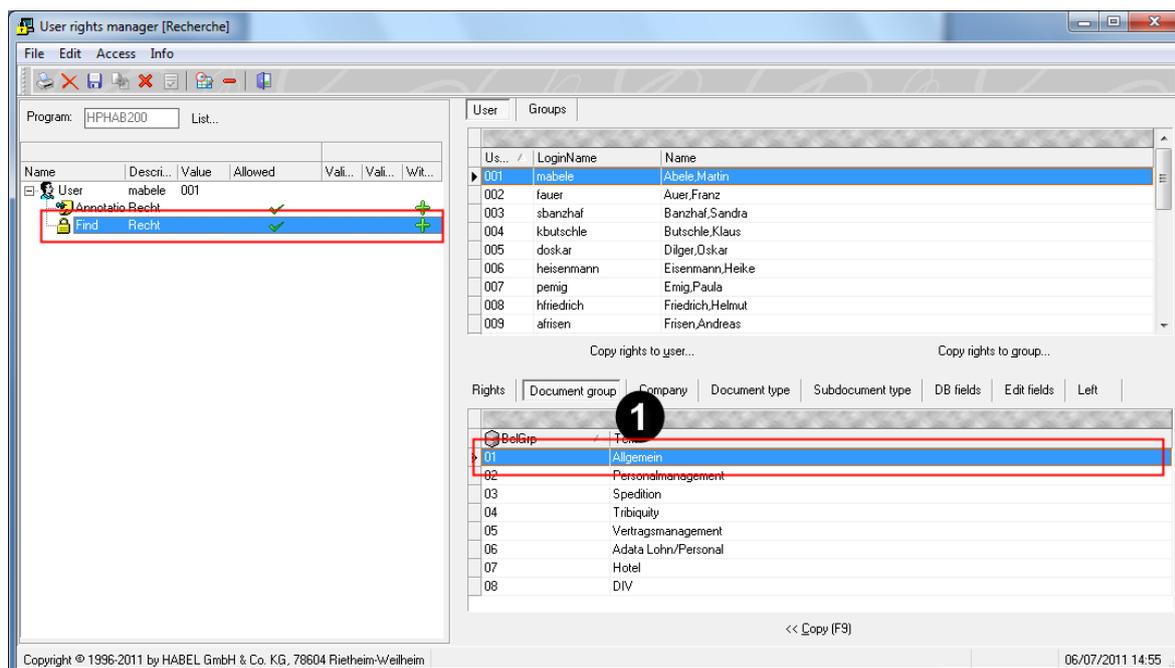


First assign the right to the user or the group, such as for instance in this case the creation of notes. After selection of the required right, click on Copy (or use the functional key F9). The right is assigned to the user.

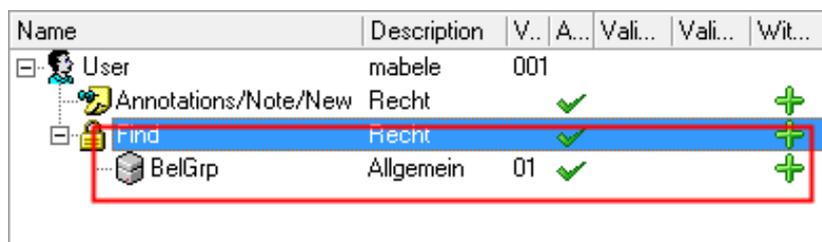
| Name | Description | Value | Allowed | Valid from | Valid to | Within date ra... |
|----------------------|-------------|-------|---------|------------|----------|-------------------|
| User | mabele | 001 | | | | |
| Annotations/Note/New | Recht | | ✓ | | | ⊕ |

4) Assign document group

If necessary or expedient, you can restrict assigned rights to document groups in the second tab (1). Here too it applies that if nothing has been selected, the user has the right for all document groups listed here.

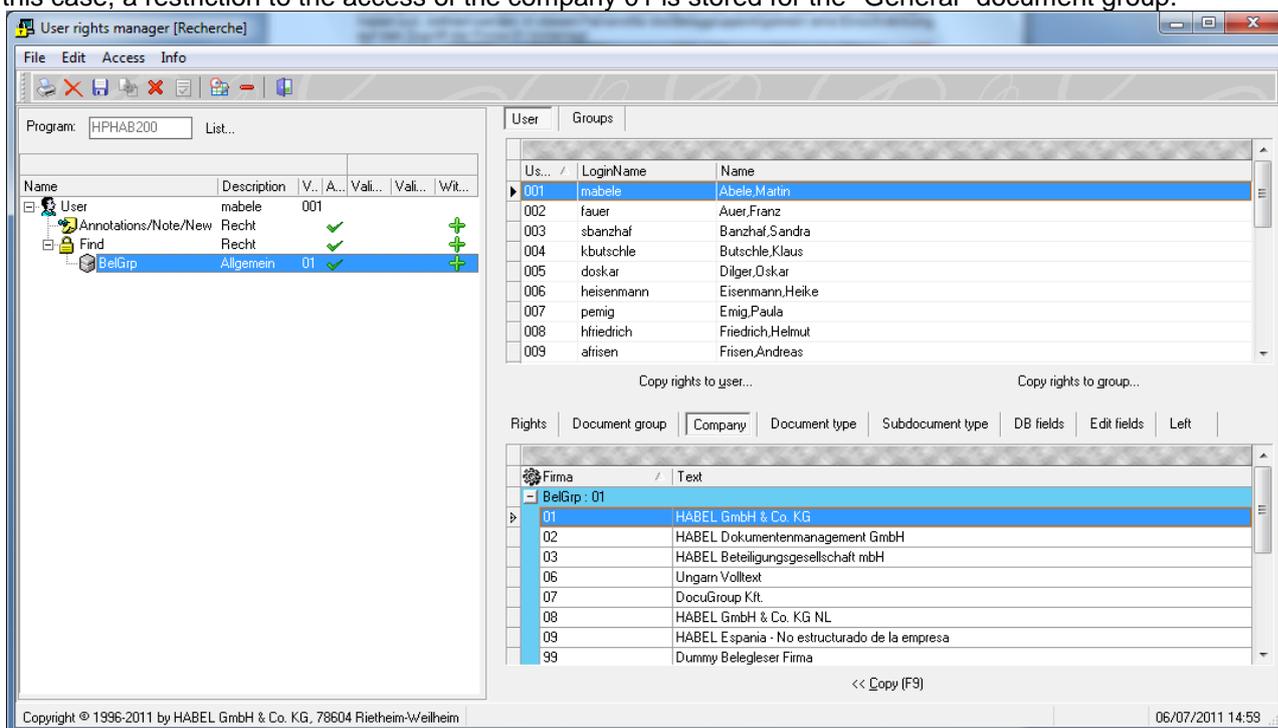


In our case, we restrict the right to find to the "General" document group, in which we select the "Find" right on the left-hand side, and, on the right, under the "Document group" tab, the "General" document group. With Copy or F9 we adopt the restriction of the "Find" right to the "General" document group into the assignment of rights of mabele. Incidentally, this user must also be assigned to this document group in the document group administration; otherwise, an assignment of rights is not possible.

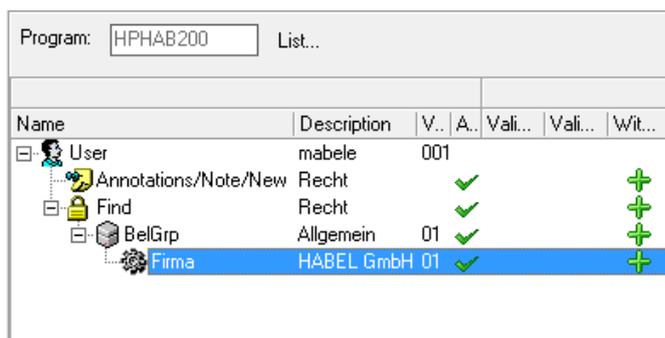


5) Assign company

Within the next tab, the companies to which the user or the group is to have access can be defined. In this case, a restriction to the access of the company 01 is stored for the "General" document group.

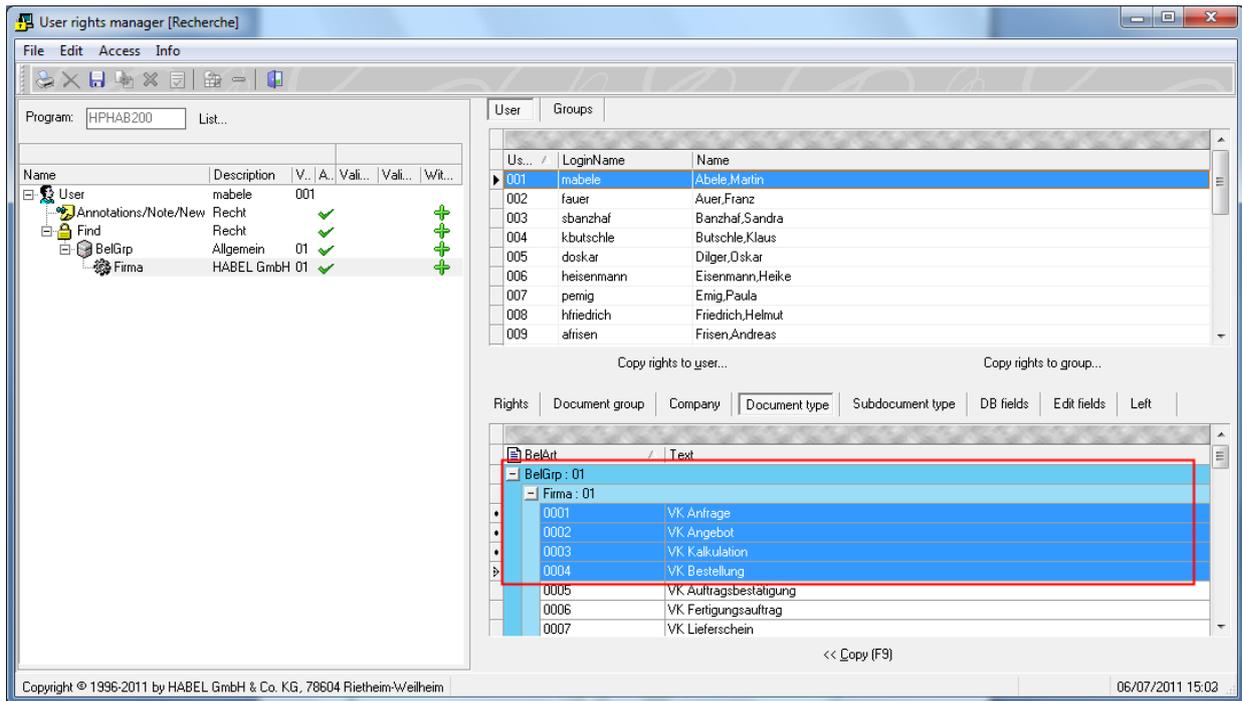


The rights tree of mabele is extended; his access rights have been restricted further.



6) Assign document type

If the user is to be restricted with regard to the access to document types, this can be defined under the "Document type" tab. By pressing the CTRL key and clicking on different document types, several can also be selected at once. These are adopted into the rights tree with "Copy".



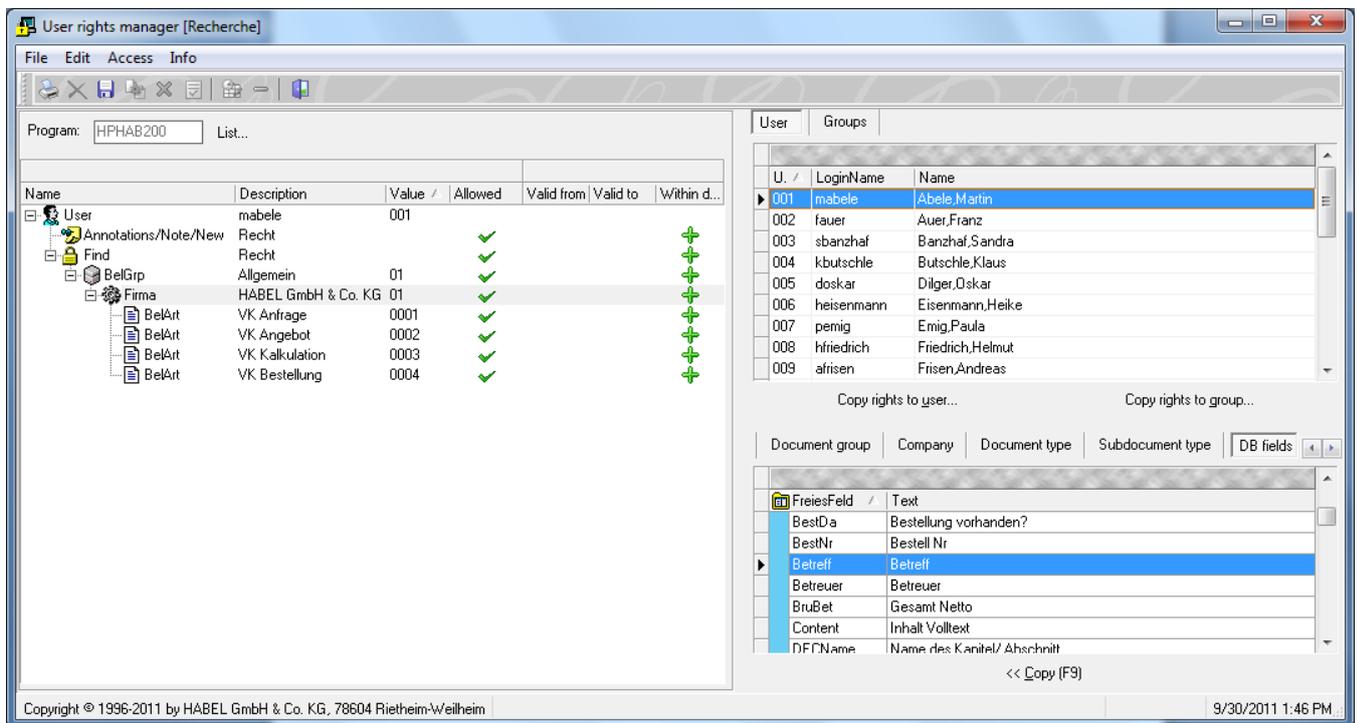
| Name | Description | Value | Al... | Valid ... / | Valid to | Within d... |
|----------------------|-------------------|-------|-------|-------------|----------|-------------|
| User | mabele | 001 | | | | |
| Annotations/Note/New | Recht | | ✓ | | | + |
| Find | Recht | | ✓ | | | + |
| BelGrp | Allgemein | 01 | ✓ | | | + |
| Firma | HABEL GmbH & C 01 | | ✓ | | | + |
| BelArt | VK Anfrage | 0001 | ✓ | | | + |
| BelArt | VK Angebot | 0002 | ✓ | | | + |
| BelArt | VK Kalkulation | 0003 | ✓ | | | + |
| BelArt | VK Bestellung | 0004 | ✓ | | | + |

7) Assign sub-document type

In the next level, the restrictions can also be done on sub-document level if sub-document types are also available for the previously selected document type.

8) Assign database fields

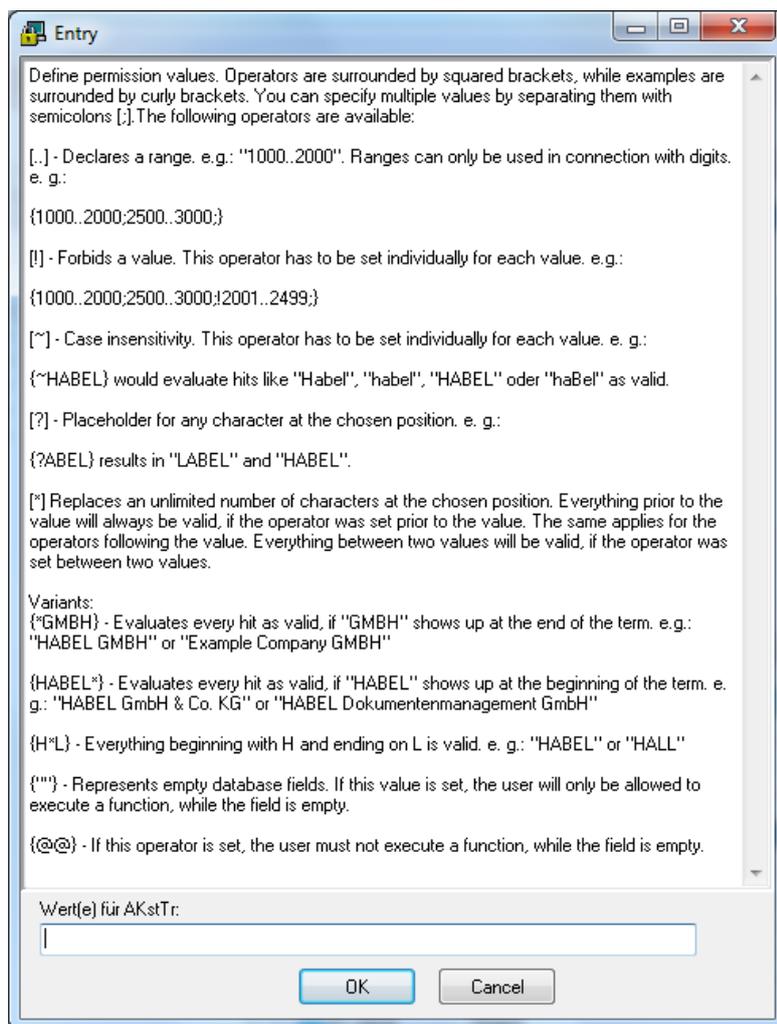
Within the document types, rights can also be assigned to individual database fields. If a corresponding field is selected under the "DB fields" tab, it is possible to enter which content the field should have so that the user can also have access to this.



After activation of the "Copy" button (or F9), you will receive a selection window to make entries for the field content.

E.g.

User mabele may search for everything at the company HABEL GmbH & CO. KG (document group general) within the document type correspondence if the "Subject" field is not filled with the "Secret" term.



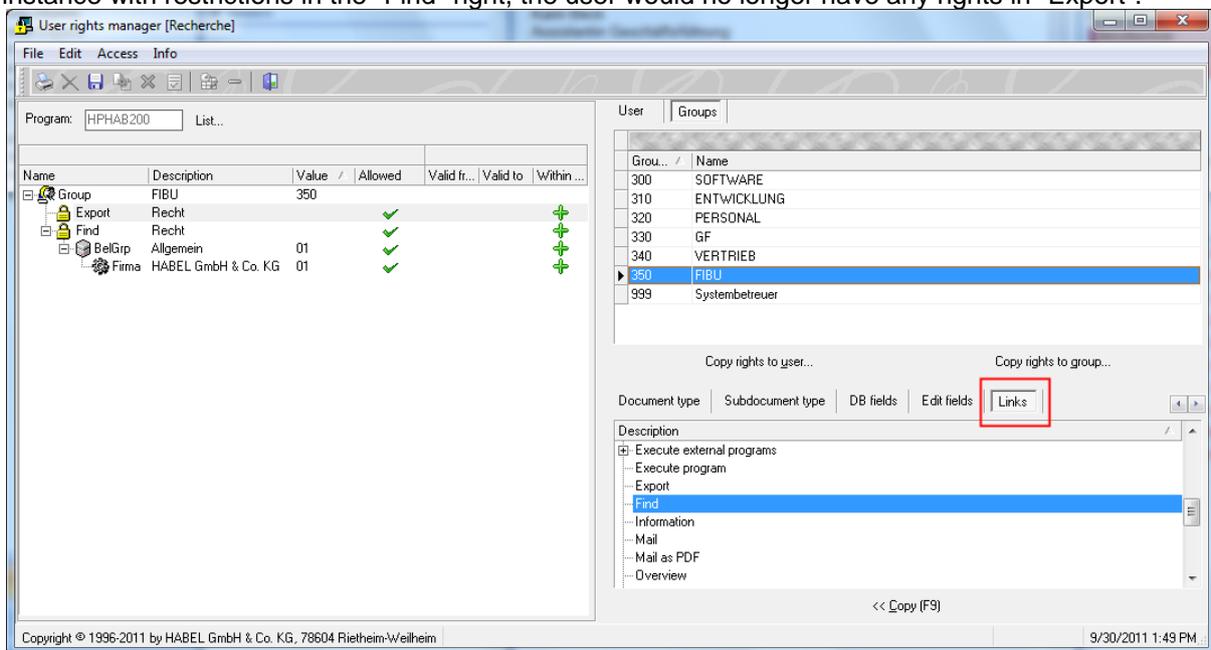
With what characters values can be excluded or specifications entered is described in the input box. Please note that if empty database fields are to be excluded from the awarding of rights, the character @@ must be entered.

9) Assign edit field

Edit fields are editing fields and control the "Change" right. In combination with the information about database fields, the change rights can also be permitted for certain fields/values.

10) Links

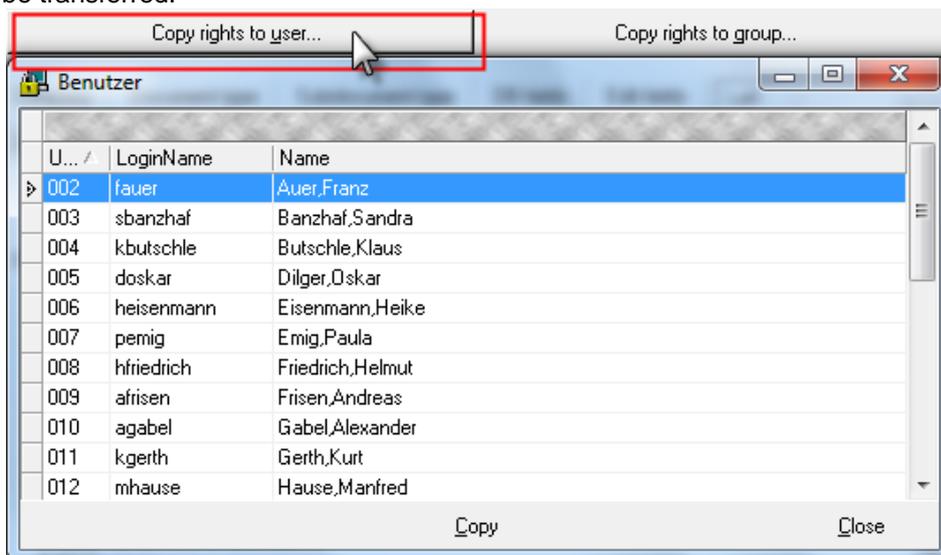
If rights are to be linked to one another, such as e.g. the "Find" right and "Export" right (user may export the same what he or she is also allowed to search for), this can be done via the last tab "Links". Select the right on the left (*here: Export*) and the right to be linked under the tab "Links" (*here: Find*) and adopt the link by pressing the "Copy" button or F9. The user may now export in an identical manner to searching. If changes are made within the right "Find", this has the same effects on the "Export" right. It is thus ensured that changes to the "Find" right also affect the "Export" right and for instance with restrictions in the "Find" right, the user would no longer have any rights in "Export".



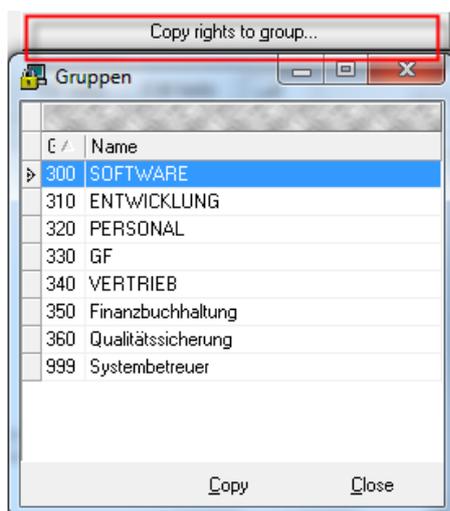
| Name | Description | Value | Allowed | Valid fr... | Valid to | Within ... |
|--------|---------------------|-------|---------|-------------|----------|------------|
| Group | FIBU | 350 | | | | |
| Export | Recht | | ✓ | | | + |
| Find | Verknüpfung | | ✓ | | | + |
| Find | Recht | | ✓ | | | + |
| BelGip | Allgemein | 01 | ✓ | | | + |
| Firma | HABEL GmbH & Co. KG | 01 | ✓ | | | + |

5. Copy rights

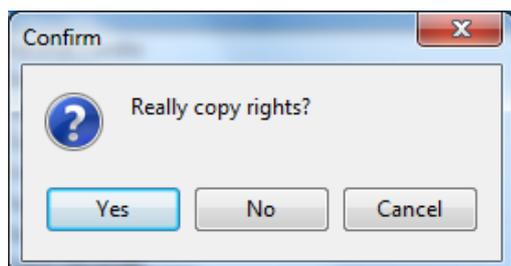
Existing rights can be transferred to users or groups. Select a user and activate the "Copy rights to user" button. You will then receive a selection of the users to whom the rights of the selected user can be transferred.



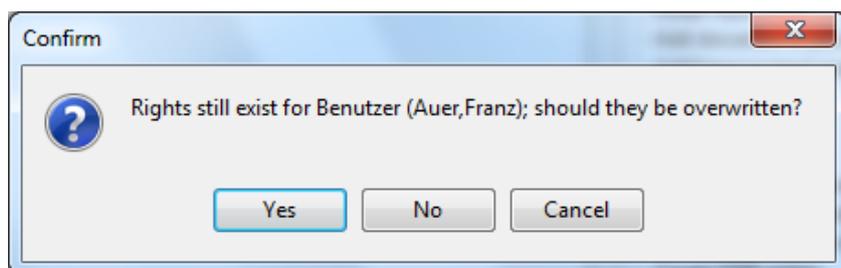
If you would like to transfer user rights to groups, activate the "Copy rights to group" button after you have selected a user.



You have to confirm the final copying process with the following prompt for confirmation or can also end the copying process ("No") or cancel it at this point.



If the user has already been assigned rights, the system enquires whether these should be overwritten with the new rights. The copying process can be ended ("No") or cancelled at this point. If it is confirmed with "Yes", the existing rights will be overwritten and not just the new rights.



This copying option is also available in the "Group" tab in order to transfer rights from the group to another group or from the group to users.



Tip: If you have users/groups that largely have the same rights, it is worthwhile copying these and then assigning further rights to the user/group who are to have more rights. This has no effect on the other users/group.

6. Overview of the rights within the retrieval

Change all

The right "Change all" is linked to the "Information" right. The access to the "Change all" button is thus managed in the search information which makes it possible for you to change all fields if you are using the module **HABEL CORRECT**.

Change all non-indexed fields

If fields are empty, these can be changed when the right has been assigned. Note: If there are no rights assigned to the user, he or she will be fully authorized. The "Change all non-indexed fields" right, however, is not covered by this rule and needs to be explicitly assigned.

Change

The "Change" right is linked to the "Information" right. The access to the "Change" button is controlled in the search information (as a standard feature, only the content of the "Info" field can be edited). The "Change" right is controlled via edit fields.

Annotations

In the tree selection "Annotation" you will find the different elements of the module **HABEL ANNOTATIONS** for the search. The tools "Marker", "Note", "Redaction", "Stamp" and "Text" can be administered here according to the specific user's requirements. The award of the rights for the respective tool, however, is only possible on the lowest level ("Change", "New", "View", "Delete").

Two special rules apply here:

- For the "Redaction" tool, the "View" right cannot be explicitly awarded; it is always active.
- A user may always delete his or her own comments that he or she has created himself/herself, even if the "Delete" right has not been explicitly assigned to him/her.

View

If you have found documents in the hit list, the "Display" right controls whether you can also display the document or not. The "Display" button is activated accordingly.

Information

This right controls the access whether you are allowed to display all the available index data for a document found. The activation of the "Information" button in the hit list view is also done here accordingly.

Add document to process

This right controls whether the user can also add documents to retrieved processes. Add document to process is started from the search, but is part of the data entry programs.

Print

Documents founded can be printed out with the "Print" button or via the menu bar. The access to this button can be managed with this right.

Save input mask as default

With this right it is defined whether the user can save the arrangement of the fields in the retrieval/information mask as a standard setting for all users.

Adapt input mask

The "Adapt input mask" right controls whether the user can change the arrangement of the fields in the retrieval/information mask or not.

Change input mask of user

If the user has been assigned this right, he or she can call up and display the input masks of the other users.

Add/remove input mask fields

Database fields can be hidden or displayed for the display in the mask. The right must be assigned in order to be able to use this function. Important: If users are allowed to add or remove fields, it could affect the functionality of the entire system. Consequently, this right should only be awarded to a few users.

Settings for annotations

In the module **HABEL_ANNOTATIONS** various basic settings can be made for annotations and tools. The award of the "Settings for annotations" right gives or withdraws from you the right to carry out changes to these settings and then to save them.

Execute dialog

"Execute dialog" controls access to the "Comment" menu item.

Export

If a user is allowed to export data from the retrieval and thus also the "Export" button is activated, control is via the award of the "Export" right if one of the **HABEL_EXPORT** modules is part of your system.

Execute external programs

If scripts are stored in your system that access external programs, you hereby award the right for the user to use this function.

Delete

If **HABEL_CORRECT** is one of the modules used by you, entries can be removed from the archive. This entry controls whether the user may delete entries (index data) from the archive or not.

Mail

The right "Mail" is coupled to the use of the module **HABEL_E-MAIL_sending**. Here, the option is managed of sending retrieved documents or also just individual pages as an e-mail.

Mail as PDF

Like "Mail", "Mail as PDF" is a right that is coupled to the use of the module **HABEL E-MAIL sending**. The only difference is that documents or pages retrieved through the acquisition of PDF licenses can be sent as e-mails in PDF format.

Edit item

In conjunction with the module **HABEL CORRECT**, this right can generate the possibility of position recording (adding, removing) in the information mask.

Create post basket entry

If the **HABEL POST BASKET** is one of the modules used by you, the authorization can be assigned here for generating a post basket entry from the retrieval or if a workflow is defined, starting it.

Show post basket history

The selection of the same name is available during the display of the document, e.g. in the "File" menu. Control via this right whether the user may have access to this selection if the **HABEL POST BASKET** is part of your system.

Execute program

If general access protection was saved for the system so that the user may do nothing before rights have been assigned, this is a very important right. If this right is not assigned (as soon as any other right is assigned), the retrieval can no longer be started as Execute program means the actual program is called up.

Change fonts and colors

With this right, the user can set colors and fonts in the retrieval.

Page layout

With this right, you have the opportunity of carrying out settings in order to freely create, for instance, the design of the print-out of the hit list (e.g. insertion of the company logo, etc.).

Save

This award of rights controls whether a document displayed may be saved using the menu option "File – Save under" as a file (*.tif) in any directory or whether attachments can also be saved. The menu option "File – Save dossier" remains unaffected by this right.

Find

The award of "Find" rights controls whether a user can search and thus the "Find" button is activated.

Print hit list

You can thus print the hit list displayed.

Print hit list preview

Like right *Print hit list*. Here, it is controlled whether the "Print hit list – Print preview" menu option is activated or not.

Overview

The "Overview" right is coupled to the module **HABEL_ANNOTATIONS**. Via the "Annotations – Overview" menu option, you can display all the comments in an overview window.

Display version info of annotations

If **HABEL_ANNOTATIONS** is one of the modules used by you, comments or editorial changes that have been inserted with the tools "Marker", "Note", "Redaction", "Stamp" and "Text" are logged in a version administration. This right controls whether you are able to see the version info of the annotations.

Start workflow

The right permits the re-start of a defined workflow if this has not started automatically or should restart.

7. Overview of the rights within the data entry programs

Annotations

Within the data entry programs, the module **HABEL_ANNOTATIONS** can also be used. The tools "Marker", "Note", "Redaction", "Stamp" and "Text" can be administered here according to the specific user's requirements. The award of the rights for the respective tool, however, is only possible on the lowest level ("Change", "New", "View", "Delete").

Two special rules apply here:

- For the "Redaction" tool, the "View" right cannot be explicitly awarded; it is always active.
- A user may always delete his or her own comments that he or she has created himself/herself, even if the right "Delete" has not been explicitly assigned to him/her.

Print

Documents can be printed out with the "Print" button or via the menu bar. The access to this button can be managed with this right.

Save input mask as default

With this right, it is defined whether the user can save the arrangement of the fields in the data entry mask as a standard setting for all users.

Adapt input mask

The "Adapt input mask" right controls whether the user can change the arrangement of the fields in the data entry mask or not.

Change input mask of user

If the user has been assigned this right, he or she can call up and display the input masks of the other users.

Add/remove input mask fields

Database fields can be hidden or displayed for the display in the mask. The right must be assigned in order to be able to use this function.

Settings (in deviation in the data entry programs Scan and Archive print)

The "Enhanced settings" right makes it possible to use different setting options in the data entry programs. For instance, with the award of the "Delete empty pages" right, the user can make settings in the data entry program with regard to the file size from which empty pages can be deleted. With the "Preview settings" right, the user can set individually how the document preview should work. In the list for the data entry by scan, other rights exist for the setting of the barcode recognition, scanner and directory settings, and graphic filters that can be assigned to the users. Rights can also be assigned for the saving of the settings/saving of the standard settings.

Execute program

Important right for if this right is not assigned (as soon as any other right is assigned), the data entry program can no longer be started as Execute program means the actual program is called up.

Change fonts and colors

With this right, the user can set colors and fonts in the search.

Save

This award of rights controls whether a document may be saved using the "File – Save under" menu option as a file (*.tif) in any directory. The "File – Save dossier" menu option remains unaffected by this right.

8. Overview of the rights within the post basket

React to payment approval

This right is relevant for users who have to start a special function at the end of a workflow chain, such as e.g. create a special file after the payment approval. This right controls whether the user may carry out this activity.

Set up automatic clean-up

If this right has been assigned, you thus have the option of automatically cleaning up your recycle bin and your outgoing mails according to a defined number of days.

Database information

This right controls whether you are entitled to display the index data via the Information button. If the information is called up based on your authorization, you move into the view of the "First page".

Database information (additional details)

This right is based on the right of the "database information". If there are further details on transactions in your system (e.g. from the financial accounting division), this information is displayed on another page (can be set per page). In addition to the "First page" tab, another tab is displayed. If you are assigned the right "Database information (additional details)", the other tab and thus also the other details can also be displayed.

Display document

If this right has been assigned, you thus have the option of having the dossier displayed as a full image or in the document preview in the post basket via the View - document preview menu option.

Save input mask as default

With this right it is defined whether the user can save the arrangement of the fields in the post basket mask as a standard setting for all users.

Adapt input mask

The "Adapt input mask" right controls whether the user can change the arrangement of the fields in the post basket mask or not.

Save input mask with document type

This right defines whether the user can save the arrangement of the fields depending on the type of document.

Change phrases

As specification in the selection box of the notifications with post basket entries, texts are stored. With the "Change phrases" right, the user can add, change or remove other texts. The changes apply for all users (globally)

Delete protected entries

Protected post basket entries that are still open or which are subject to certain rules, e.g. a specified workflow. If a document has been captured that is not meant to go through the workflow as e.g. an employee is not meant to see this document in the workflow, entries of this kind can be deleted after granting authorization. However, this right should only be transferred to the administrator and employees in corresponding positions.

Edit item – Remove item – Add item

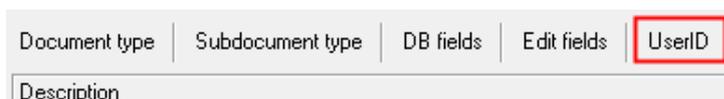
With this right, field content filled by item recording can be either edited, deleted or added.

View post basket

This right defines which post basket can be viewed by the user. At least the user's own post basket must be assigned as otherwise the user cannot call it up.

Note:

In the award of rights for the post basket, there is also the additional tab "User ID" in order to control access to third-party post basketes.



Edit post basket entries

The "Edit post basket entries" right controls the "Changes permitted" option.

Remove post basket entries definitively

Here, the authorization to definitively remove entries from the recycle bin is administered.

Redistribute post basket entries

Makes it possible e.g. for a team leader to forward the documents distributed from a group post basket to an administrator to another employee (for instance if the first administrator is ill).

Execute program

Important right for if this right is not assigned (as soon as any other right is assigned), the post basket can no longer be started as Execute program means the actual program is called up.

Change fonts and colors

With this right, the user can set colors and fonts in the search.

Change column properties

Right to display and hide columns, and to change their order and labeling.

Refuse payment approval immediately

Cancel payment approval chain

Start payment approval chain

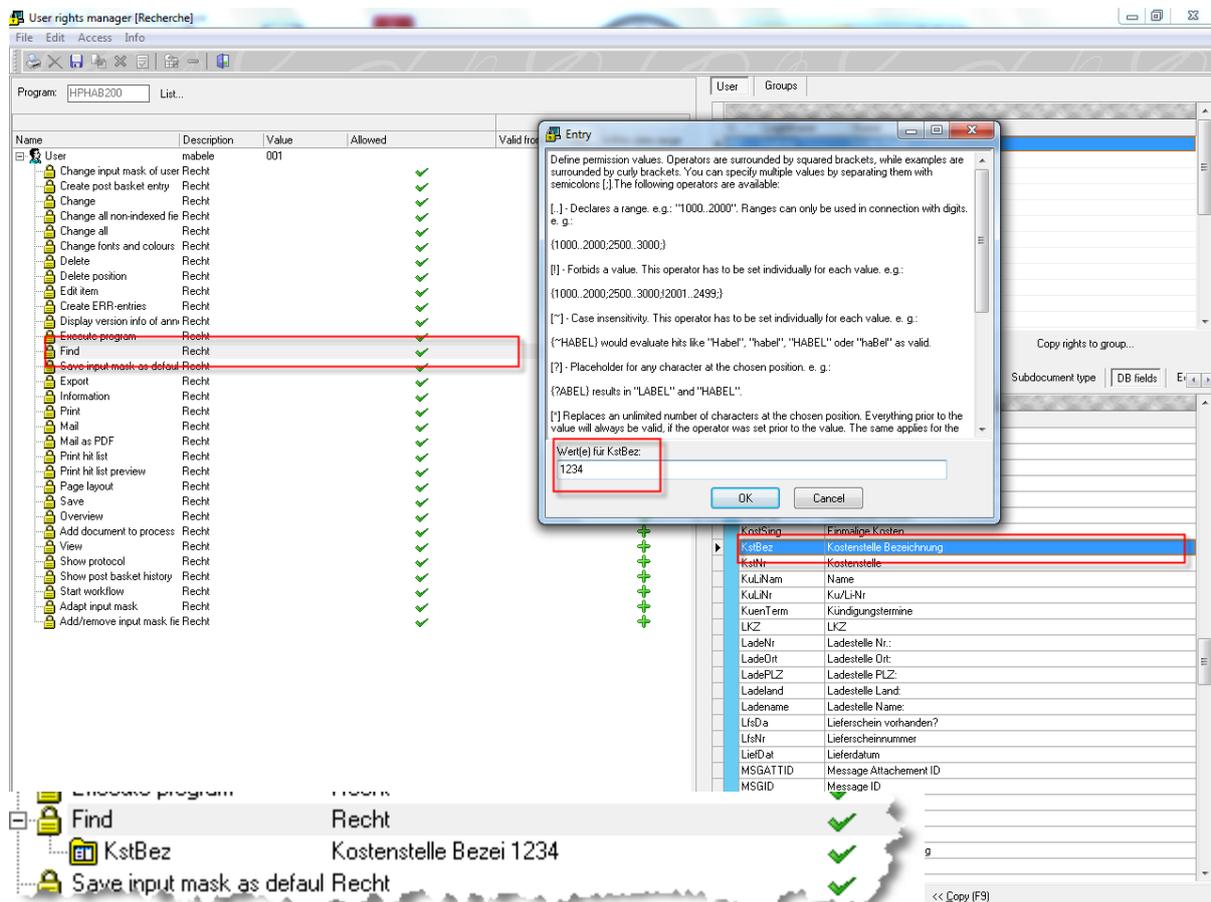
These rights in turn are those that relate to a special workflow and with which e.g. payment approvals are also awarded. These rights control whether the user may intervene at certain points or not.

Practical examples:

If employees are to receive rights that are only to apply for a particular value in the database field but across all document types, this can be done by assigning the database field at rights level.

For instance, user Auer should only be able to search for documents with which the cost center field is filled with 1234 or is empty (empty is therefore important as e.g. document types exist such as correspondence that do not require any cost center). If empty fields are to be excluded, the characters @@ are to be inserted as values.

If several employees exist who have the same rights but variable values would have to be entered in the database field, these values can only be depicted via variables. A separate file is maintained on the variable that is linked to the rights tree.



HABEL MASK CONFIGURATION

1. General

The structure of a retrieval, data entry or post basket mask is configured individually pursuant to your specifications. If changes are to be carried out subsequently, this is possible with the corresponding effort. For this purpose, configuration files are available in HABEL that you are familiar with and learn to edit after completion of the administrator training courses. In addition, you can also carry out a large number of these changes with a graphical interface with the program **HABEL MASK CONFIGURATION**. These are, for instance:

- Activate/deactivate database fields
- Create new database fields
- Define the sequence of database fields
- Define mandatory/optional/item fields
- Properties of the database fields

Important note:

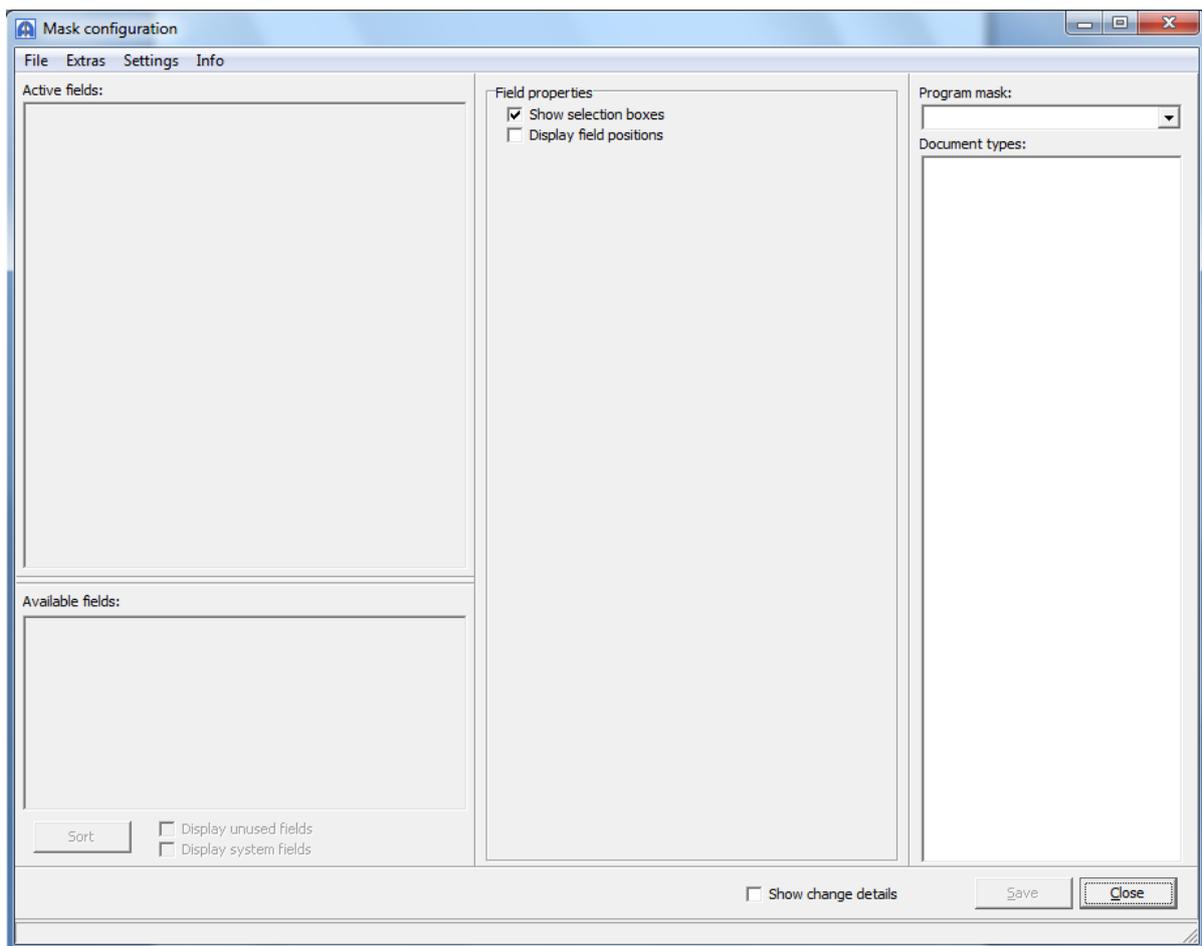
The **HABEL MASK CONFIGURATION** is a graphical interface for carrying out the adjustments. There are no plausibility checks whether the changes carried out entail further adjustments. Consequently, changes that are not carried out completely/correctly and taking into account further adjustments to masks, databases, for example, result in the system no longer running properly. In order to work with the **HABEL MASK CONFIGURATION**, it is therefore necessary to undergo the administrator training at HABEL. If the processes are understood that bring about changes, the program can be used as a convenient tool.

Changes to the system that you carry out with the **HABEL MASK CONFIGURATION** can be made in ongoing operations. In order to start the **HABEL MASK CONFIGURATION**, you need the program *hphab882*.

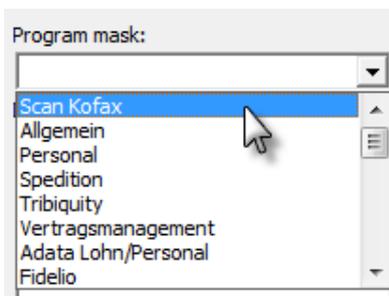


Mask configuration

2. Program structure

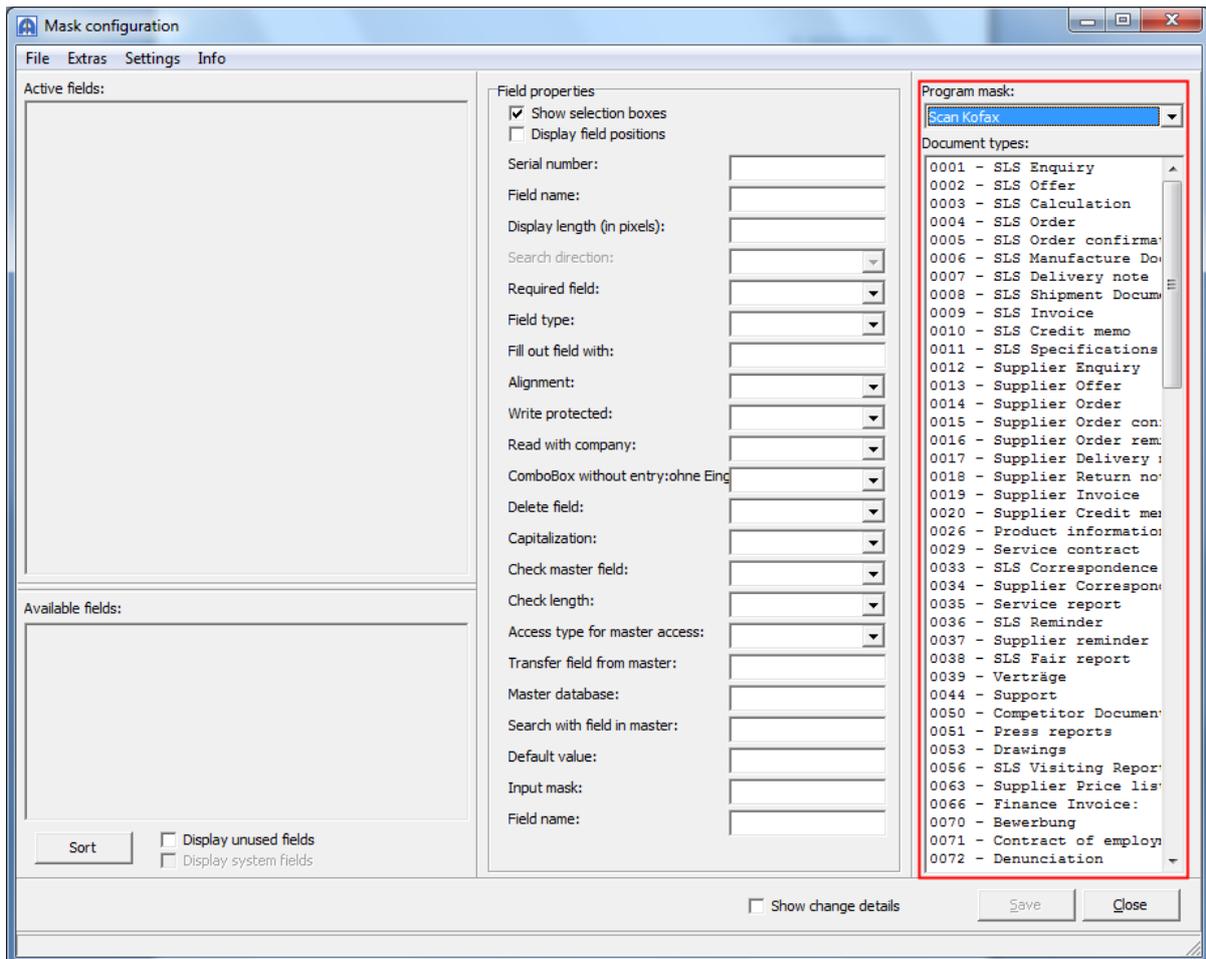


When you started the HABEL MASK CONFIGURATION, this initially appears "empty". The first step is the selection of the mask to be edited. For this purpose, you can use the Program mask selection box on the right-hand side.

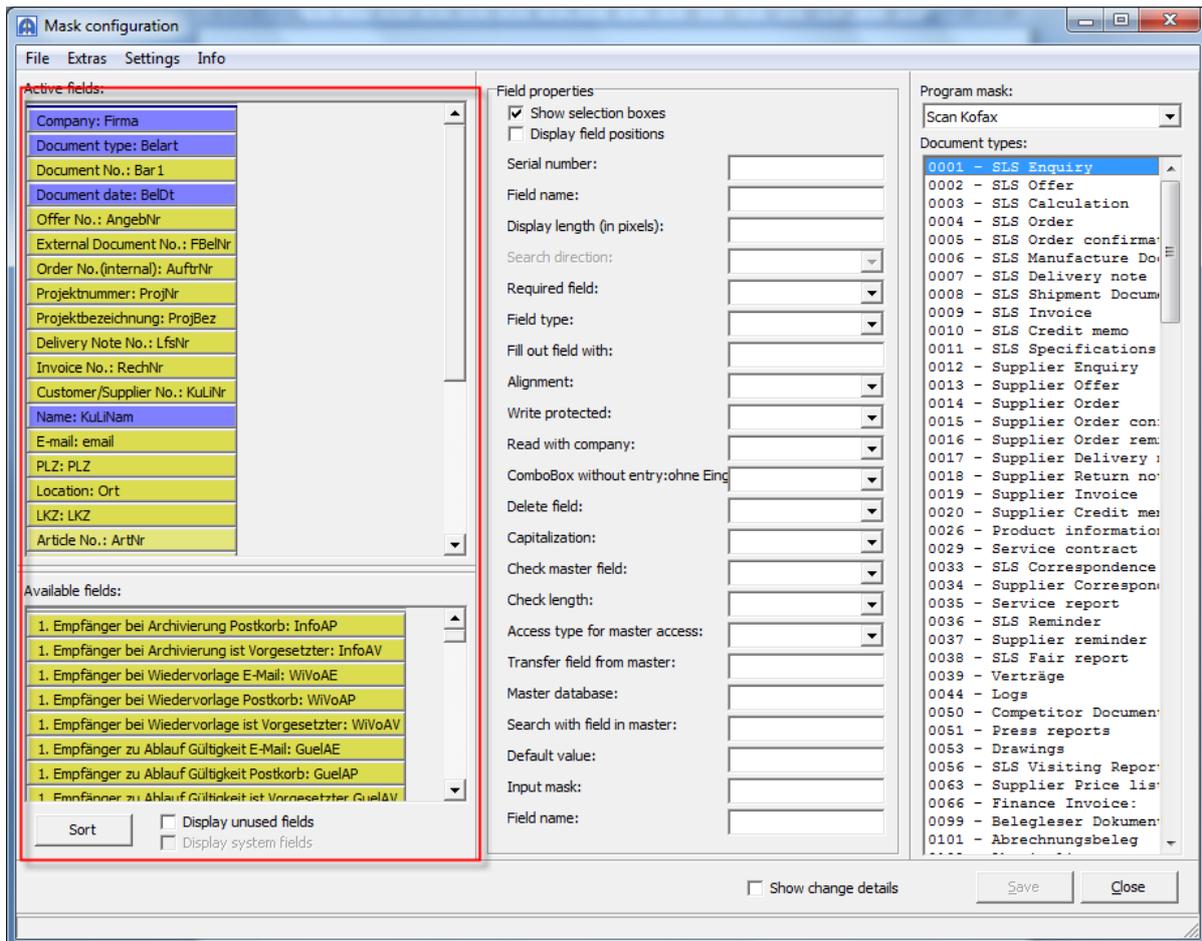


Select the mask here that you want to edit. Generally, the masks in HABEL are to be seen separately from one another so that each mask could differ from the others. If you are carrying out changes and would also like to assign these for other masks, you must adopt the changes accordingly.

If you have selected the program mask, you will have the document types displayed in the column below that have been activated for this program.



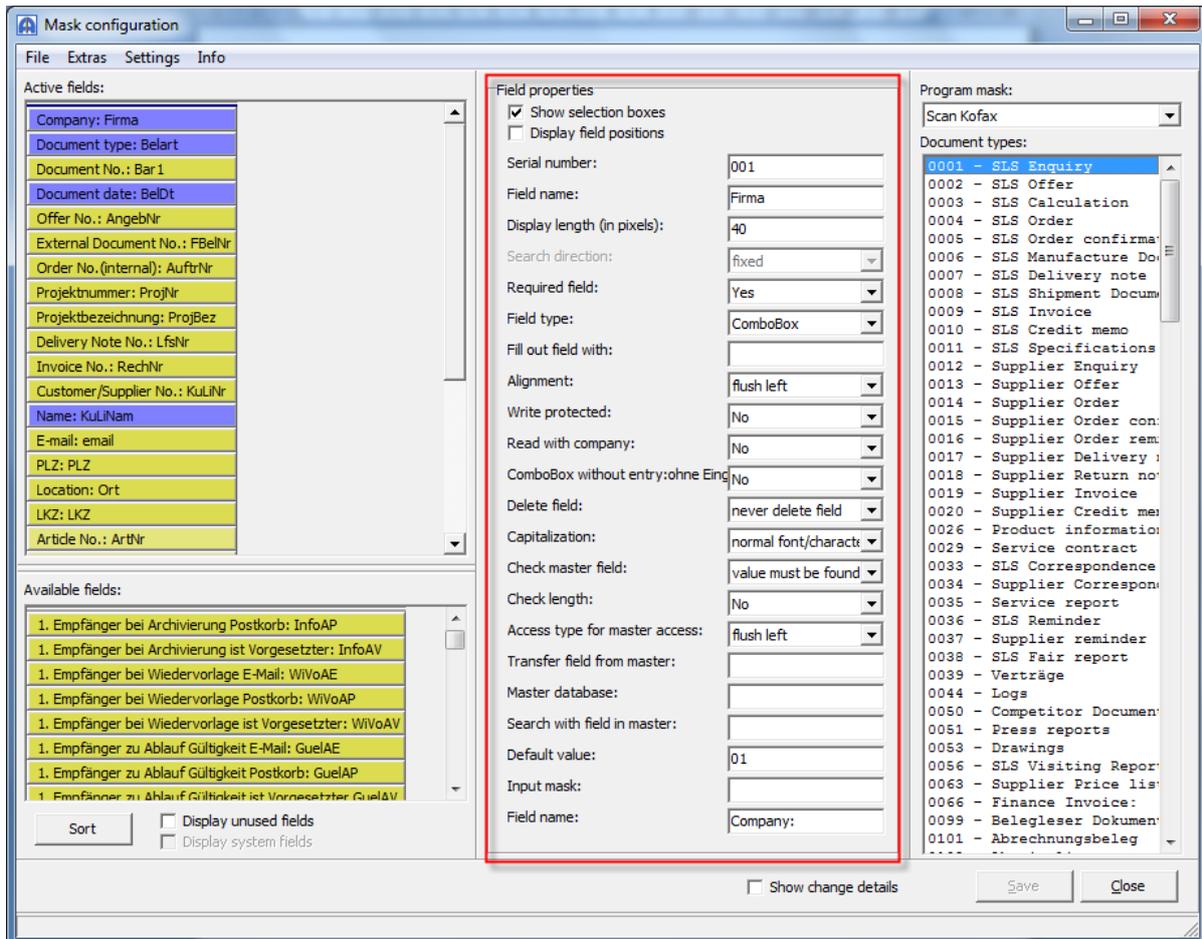
After selection of a document type, the fields active for this document type and available are displayed in the left-hand section of the HABEL MASK CONFIGURATION.



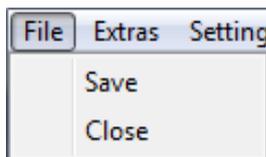
Note:

Blue fields are required fields, light blue fields are mandatory fields with item recording; yellow fields are optional fields, light yellow fields are optional fields with item recording.

If you then click on a field, the middle area is also filled with the field properties.



3. Menu bar

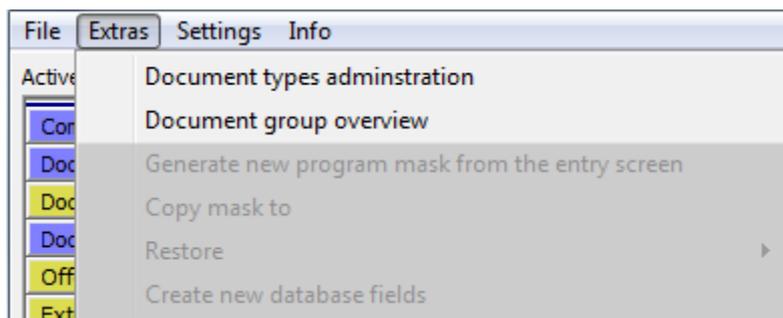


File – Save (1)

With this command, the changes made are implemented. Alternatively, a button in the footer is also available.

File – Close (2)

With this command, the HABEL mask configuration is ended. If you have not saved the changes that you have made, these will also not be adopted. You can also close the program via the button "Close" in the footer or the X in the top right hand corner of the mask.

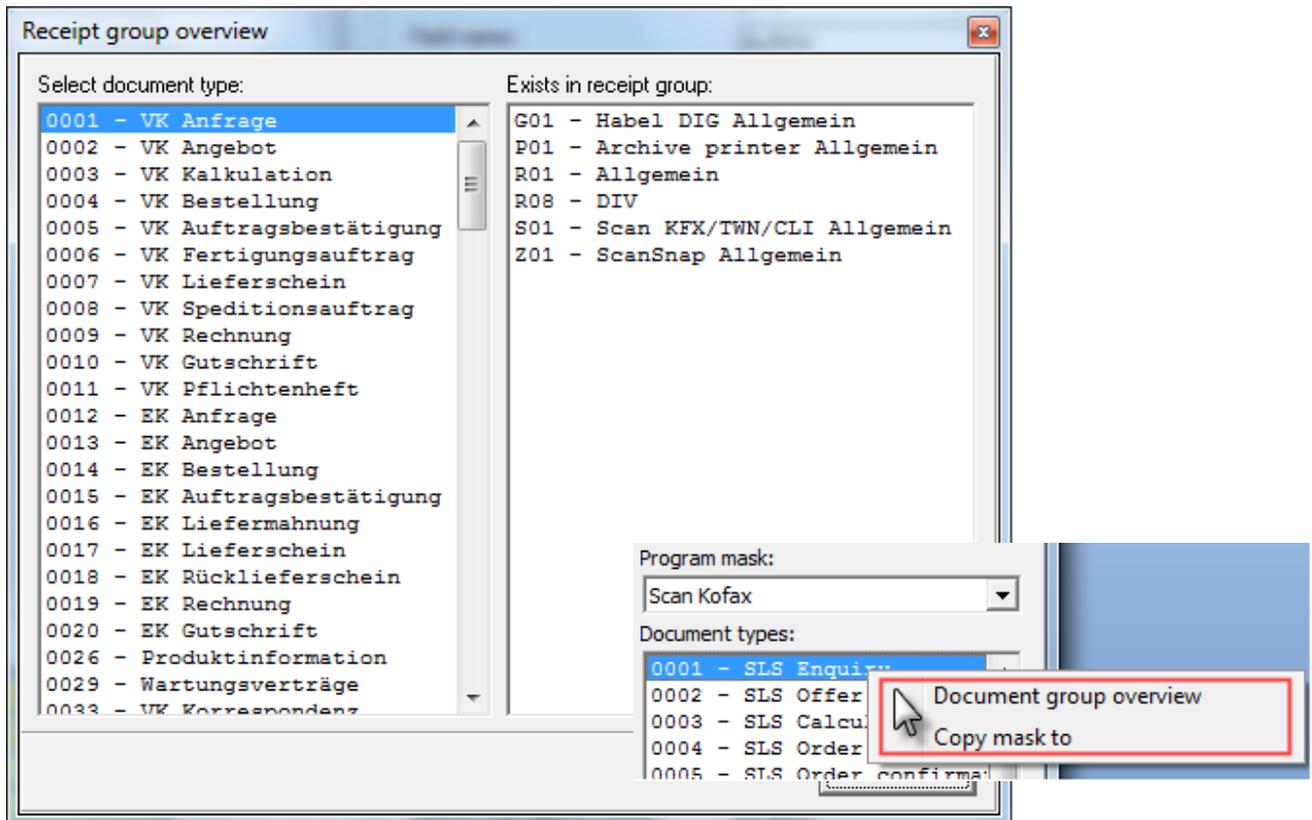


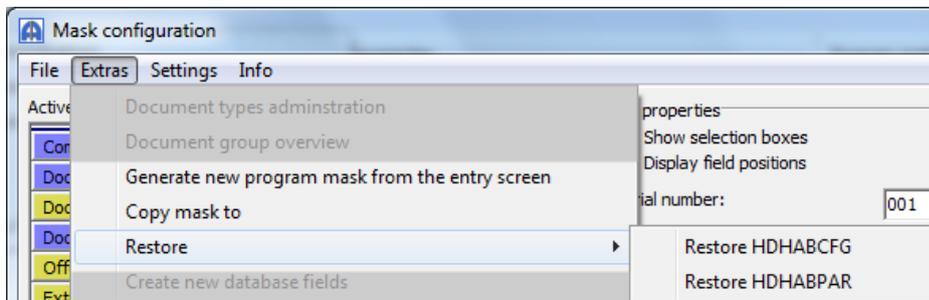
Extras – Document type administration

With this menu item, the document type administration is started. There, the clients, document groups and masks are assigned to the document types, among others. Details see Point 6 (Document types administration).

Extras – Document group overview

Overview which document type is assigned to which document group. What is a document group? A document group is the combination of similar document types. There are document groups for the retrieval, data entry programs, etc. Different program functions can be coupled to the document group; this is normally derived from the document group name (e.g. retrieval HR correction). Can also be reached via the pull-down menu in the selection of the program mask





Extras – Generate new program mask from the entry screen

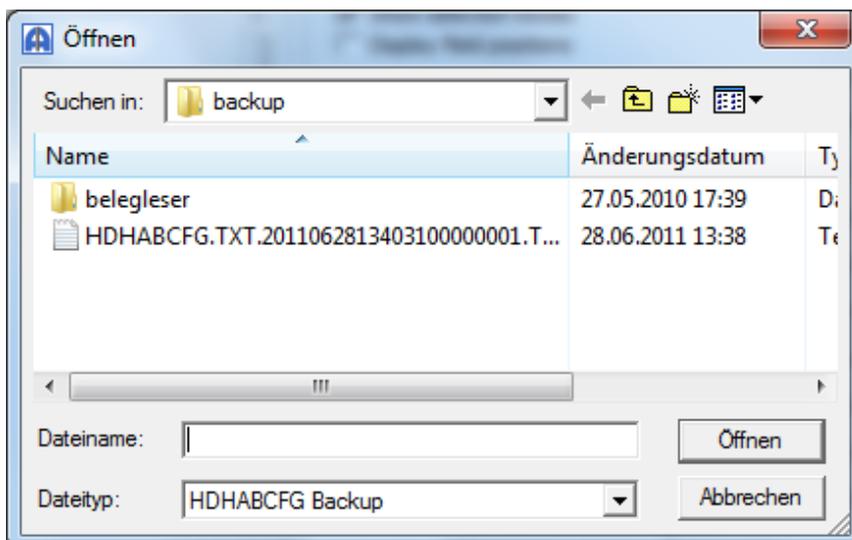
With this command, new masks can be generated from existing data entry masks. Important: Via the menu Settings – Default values for new fields, it is defined how the field properties of a new mask will be. If a new program mask is generated from a data entry mask, it should be ensured that expedient data are stored here. For instance, required fields that make little sense in a retrieval mask are stored in the data entry mask. Details see Point 7 (Creating and copying masks).

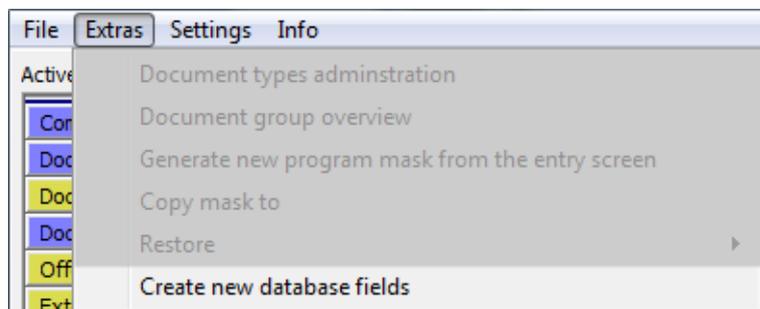
Extras – Copy mask to

With this command, any masks can be copied to other masks (e.g. after changing the retrieval masks, these can also be adopted to the data entry masks or post basket masks). Details see page X

Extras – Restore

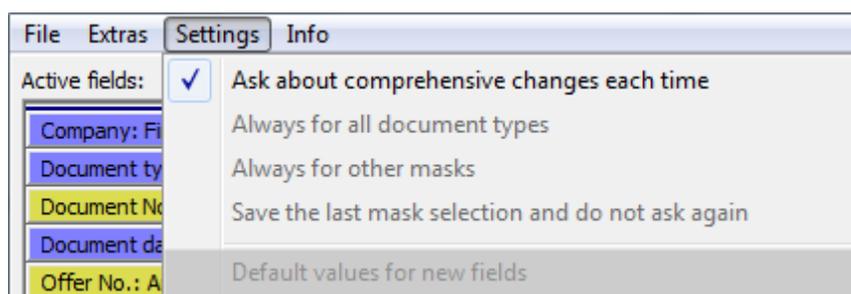
Each change in the **HABEL MASK CONFIGURATION** is saved by back-up. With the "Restore" menu item, the changes can be reset accordingly. You will receive a query which of the back-ups you would like to use for the restoration.





Extras – Create new database fields

Via this menu item, it is possible (if MySQL and/or MSSQL database is available) to create new fields (i.e. search criteria) for the database. Details see Point 5 (create new database fields).



Settings – Ask about comprehensive changes each time

"Comprehensive changes" means changes that could possibly also be adopted into other masks or document types. If "Ask about comprehensive changes each time comprehensive" is activated (recognizable by the tick before the menu item), the other commands "Always for all document types", "Always for other masks" and "Save last mask selection and do not ask again" are grayed out and cannot be selected any more. With each comprehensive change, it is now asked whether these changes should also be adopted into other document types or masks. If this command is not activated, the following three commands can be used:

Settings - Always for all document types

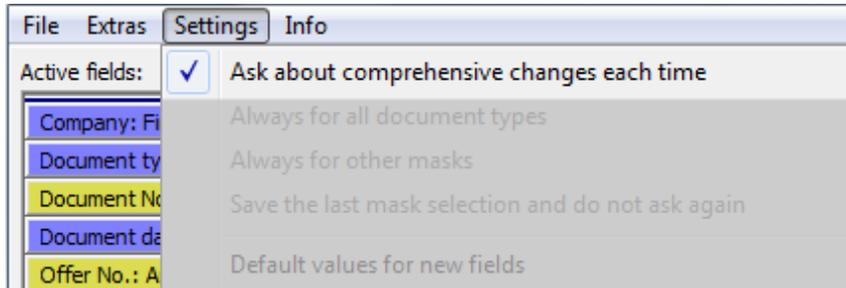
All comprehensive changes such as e.g. the adding of fields that have not been active up to now are adopted for all document types. **Important:** If you have this function active, the changes are adopted for all document types without a renewed request!

Settings - Always for other masks

All comprehensive changes such as e.g. the activation of required fields are adopted for all masks. **Important:** If you have this function active, the changes are adopted for all document types without a renewed request!

Settings - Save last mask selection and do not ask again

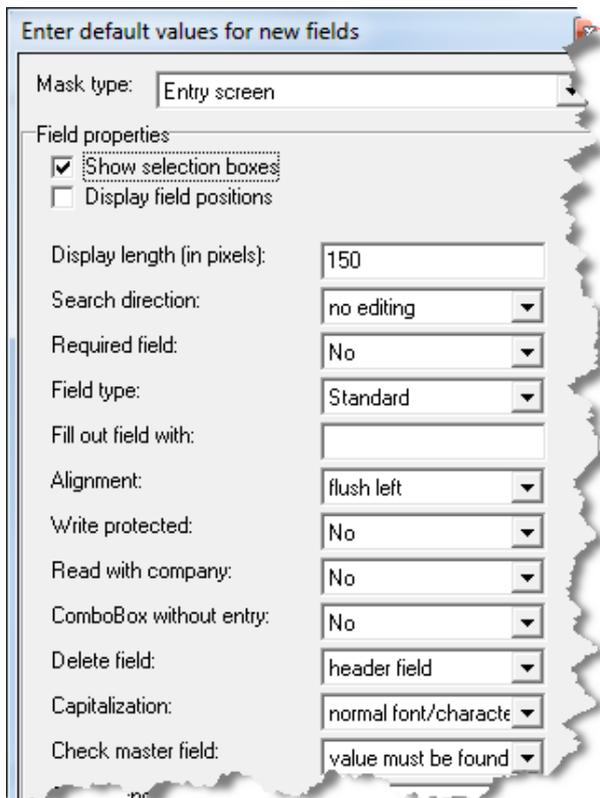
The last selection made after the query will be adopted in future without a renewed request.



Settings – Default values for new fields

If you frequently use the same values for new database fields, you can store specifications that are used when creating new fields. For this, you use the command "Default value for new fields" and store the required definitions.

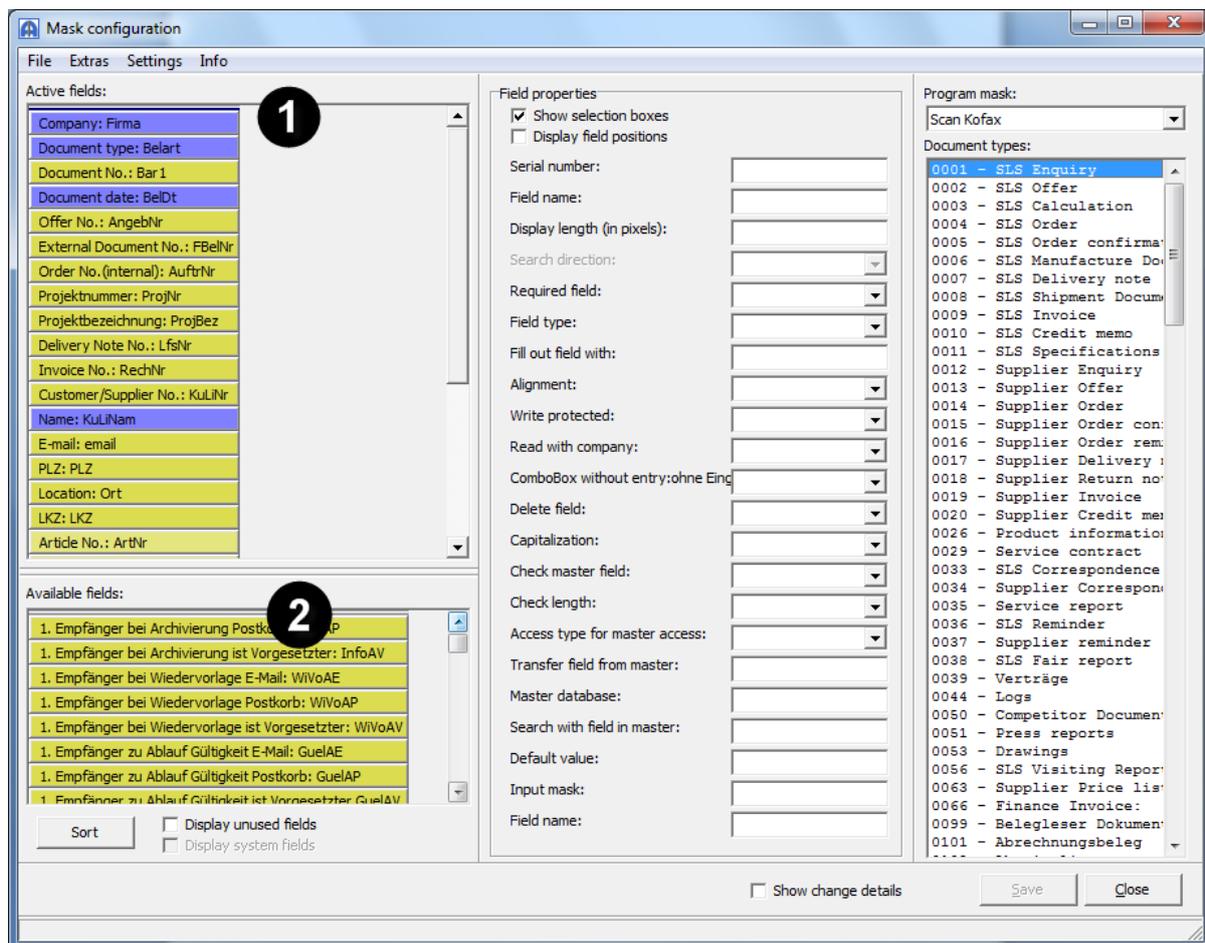
If program masks are created from data entry masks via menu Extras - Generate new program mask from the entry screen, it is absolutely necessary that the correct data are pre-defined for retrieval masks (required field: no, etc.).



4. Administration of search criteria (database fields)

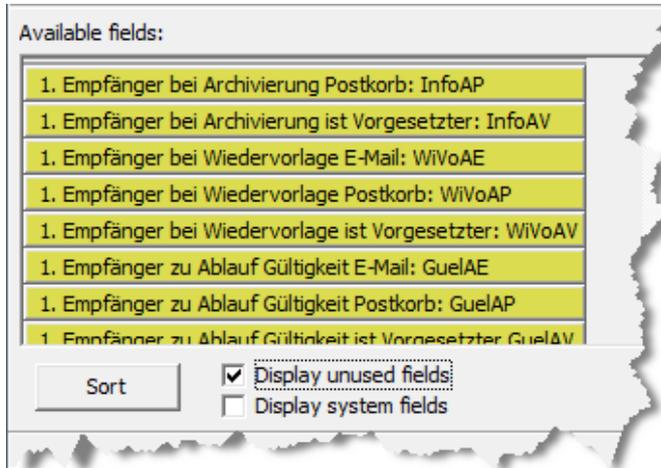
In order to activate existing fields within document types, to carry out changes with regard to required/optional fields, etc. or to create new fields, comprehensive options are available in the HABEL MASK CONFIGURATION.

When you have selected the program mask and within this the document type, the active and available fields are displayed in the left-hand section of the program.



The active fields (1) indicate all database fields that are visible for this document type in the mask. The different colorings of the fields indicate whether it is optional fields (yellow), optional fields with position recording (light yellow), required fields (blue) or required fields with position recording (light blue).

All database fields that have not been used for this document type to date but are available in the database are classified under "available fields" (2).

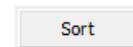


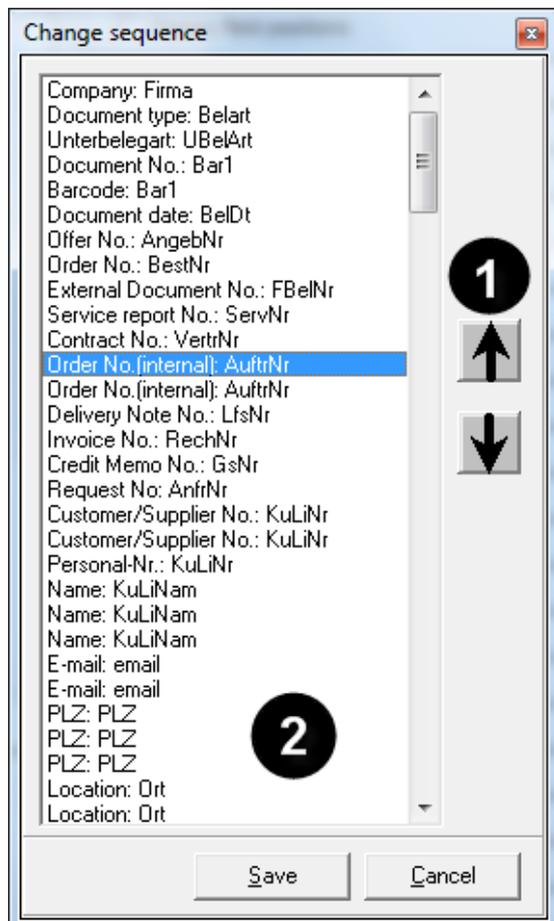
If there are fields available in the database that have not been used to date in any mask, these are "unused fields". You can have these displayed by setting a tick next to "Display unused fields". In addition, the command "Display system fields" becomes active. The "System fields" term refers to the fields that are not intended for the actual search but are important for internal purposes.

These fields are displayed in light gray font in the "Available fields" section.

In order to activate database fields for this document type, to move them from the "Available fields" column into the "Active Fields" section, the available fields are to be pulled to the active fields by drag&drop. Conversely, active fields can also be hidden for the usage by them being pulled back into the "Available fields" column.

After the change has been saved, the order of the fields can also be changed. For this purpose, the "Sort" button is to be activated and the order set in the selection box.





The order of the fields, as they are set here, is the standard order of the mask. Each user can set the order of the fields himself/herself within the mask (user-dependent, in the respective mask such as e.g. retrieval mask, data entry mask, etc.). Fields that are not used by the user can also be hidden individually there.

In order to move fields for the standard mask to another place, the "Sort" command is used in the HABEL MASK CONFIGURATION.

Initially, the field is to be highlighted with a click and can then be moved up and down with the arrows (1).

Via the "Save" button, the changes are adopted; with "Cancel" you can leave the box without any changes (2).

In order to carry out changes for the database field yourself, various options are available under the "Field properties" section.

Field properties

Show selection boxes
 Display field positions

Serial number: 013

Field name: **1** AuftrNr

Display length (in pixels): 150

Search direction: no editing

Required field: No

Field type: **2** master with Aimdex

Fill out field with:

Alignment: **3** flush left

Write protected: No

Read with company: No

ComboBox without entry: ohne Eingabe No

Delete field: header field

Capitalization: normal font/character

Check master field: **4** a beep sounds if not

Check length: No

Access type for master access: float(free)

Transfer field from master: AuftrNr

Master database: **5** HDHBL925

Search with field in master: KuLiNam

Default value:

Input mask:

Field name: Order No. (internal):

Only after clicking on the field in the "Active fields" section or "Available fields" do the field properties in the medium range of the HABEL MASK CONFIGURATION become active.

You can choose whether you want the view of the field properties mnemonic with or without selection boxes or as field positions with or without selection boxes.

In order to work without selection boxes or with field items, you should be familiar with the existing administration of the search criteria. You get the view of the field properties in the form of number abbreviations and parameters in order to administer them.

Field properties

Show selection boxes
 Display field positions:

| | |
|-------|---------|
| 18-20 | 012 |
| 21-28 | AuftrNr |
| 29-31 | 150 |
| 32-32 | ... |

What is behind the individual field properties is described in the sections below.

Field properties

Show selection boxes

Display field positions

Serial number:

Field name:

Display length (in pixels):

Search direction:

Required field:

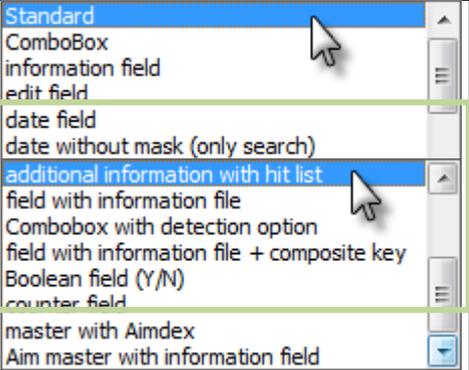
| | |
|------------------|--|
| Serial number | The position of this database field |
| Field name | Internal description of the field. |
| Display length | Indication of the display length of the field with non-shiftable fields in pixels (1 character incorporates around 8 pixels). |
| Search direction | <p><i>flush left/right</i> The value of the term sought is left/right-flush aligned in the field.</p> <p><i>Fixed or float(free)</i> The value must tally precisely with the term sought (fixed) or it is sufficient if only parts of the database field content match the term sought.</p> <p><i>*SQL search*</i> * are placed before and behind the value entered, which triggers a float search with SQL databases.</p> <p><i>No editing</i> No longer active</p> <p><i>Information field</i> Definition of this field for use as an information field. Information fields are displayed as a note on the document and can be changed by users via the "Change" button in "information" mode (without the existence of the HABEL CORRECT module).</p> |
| Required field | <p>Here, it is set whether the field is to be a required field. Yes means: It is possible to leave the field without input, but the field cannot be saved without input. Yes with check means: Leaving the field without input is not possible.</p> |

Field type: **2**

| Field type | Definition of the field type |
|------------|--|
| | <p><i>Standard</i> Free entry of individual numbers, letters, words, etc.</p> <p><i>ComboBox*</i> Definition as a selection box with pre-defined terms.</p> <p><i>Information field</i> no longer active</p> <p><i>Edit field</i> no longer active</p> <p><i>Date field*</i> Date input can be carried out within this field. For this, the input of . as a divider between day/month/year is not necessary. Abbreviations such as ., +1, -10, etc. can also be used. The field has the format DD.MM.YYYY</p> <p><i>Date without mask (only search)*</i> Unformatted field with the option of entering a date.</p> |

Standard
 ComboBox
 information field
 edit field
 date field
 date without mask (only search)
 additional information with hit list
 field with information file
 Combobox with detection option
 field with information file + composite key
 Boolean field (Y/N)
 counter field
 master with Aimdex
 Aim master with information field

***Other settings necessary at different points (part of the advanced administrator training)**

| | | |
|------------|--|--|
| Field type | <p>Definition of the field type</p> <p><i>Additional information with hit list*</i> Access to index master with hit list.</p> <p><i>Field with information file*</i> Access to index master without hit list.</p> <p><i>ComboBox with detection option*</i> Definition as a field with selection box and also for free input.</p> <p><i>Field with information file + composite key*</i> Access to index master without hit list, but to other key (example: the company and name from the index master is taken into consideration for the result).</p> <p><i>Boolean field (Y/N)*</i> Setting option whether it is a field with a selection "Yes/No".</p> <p><i>Counter field*</i> Setting option whether it is a counter field. A serial number is awarded within a counter field via the functional key or menu access and this number can be used, for instance, to merge host data (see I. Recording – The Electronic Barcode)</p> <p><i>Master with Aimdex*</i> Definition of this field as a field with master access. After entry of a value in this field, data from a master are used in order to be able to adopt the values from this in the defined fields.</p> <p><i>Aim master with information field*</i> As master with Aimdex, but a value is displayed in the field (example: Entry post basket recipient name – Display of post basket recipient name and post basket recipient number in the split field).</p> |  |
|------------|--|--|

Delimitation index master – Aimdex master

With the index master, the search result is case-sensitive and the term must be entered in such a way that it matches the hit starting from left to right.

***Other settings necessary at different points (part of the advanced administrator training)**

3

Fill out field with:

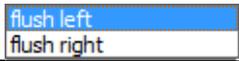
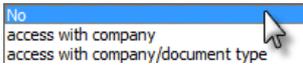
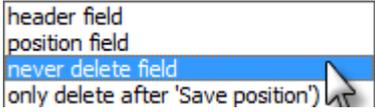
Alignment: flush left

Write protected: No

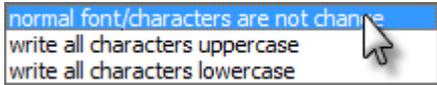
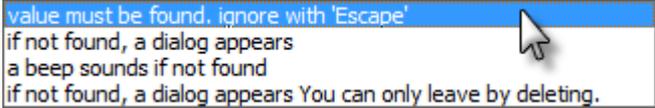
Read with company: No

ComboBox without entry: ohne Eingabe No

Delete field: header field

| | |
|------------------------|---|
| Fill out field with | Definition with what character free spaces until the end of the field (depending on field alignment left or right) are to be filled. |
| Alignment | Definition, whether the values are to be aligned left- or right-flush in the database fields.  |
| Write-protected | Definition (yes/no) whether the field content is write-protected so that this cannot be filled by the user. |
| Read with company | For fields with a master access or ComboBox, it can be defined that an Aimdex access applies. During access, a filter with the company or the compiled key is thus placed over the company and document type for this.  |
| ComboBox without entry | Definition (yes/no) whether the field has a one-part (yes) or a two-part ComboBox (no) (<i>frequent example: Document type: key + name</i>) |
| Delete field | Can only be defined for the fields in the data entry masks  <i>Head field</i> The field is defined as a head field and is emptied after saving the data entry. <i>Position field</i> The field is defined as an item field and is emptied after the item is saved. <i>Never delete field</i> The value is retained also after the captured data are saved. <u>Note</u> : is the standard setting with the creation of new database fields. <i>only delete after "Save position"</i> Field is emptied after "Save position" but remains filled after saving (of the entire dossier). |

| | |
|--------------------------------|------------------------|
| Capitalization: | normal font/charact: ▾ |
| Check master field: | a beep sounds if not ▾ |
| Check length: | No ▾ |
| Access type for master access: | float(free) ▾ |
| Transfer field from master: | AuftrNr |

| | |
|-------------------------------|--|
| Capitalization | <p>If normal font/characters are not changed is selected, the characters entered are not changed. With fields that have been assigned "Write all characters uppercase", everything is displayed in capitals after the characters have been entered; with "Write all characters lowercase", the characters are written in small letters. Depending on the definition of this field property, the display is done independently of the actual syntax convention on entry.</p>  |
| Check master field | <p>For fields with which a master access is stored, the reaction can be defined here. "Value must be found, ignore with Escape" is a standard feature and means that it is possible to leave the field without a value having been found.</p>  |
| Check length | Definition (yes/no), whether it should be checked if the number of characters corresponds to the length of the database field. |
| Access type for master access | Definition how the type of search should be done in the master (flush left/right or fixed according to the value in the field or freely according to parts of the value in the field). |
| Transfer field from master | Is used if the value of another field can be adopted from the master into the search field. E.g. Search in Customer numbers field with the customer name; with selection of the hit (master access), the number is entered. Here, it is entered which value (field name from master database) is written into the database field. |

| | |
|------------------------------|-----------------------|
| Master database: | HDHBL925 |
| Search with field in master: | KuLiNam |
| Default value: | |
| Input mask: | |
| Field name: | Order No. (internal): |

5

| | |
|-----------------------------|---|
| Master database | Definition of the file name of the master file/master database when the master is accessed |
| Search with field in master | Definition in which field in the master database the search is carried out with the field content entered (field name from master database is to be entered). |
| Default value | Definition of values that are stored in the field in fixed form such as, for instance, date of the present day (@Date). |
| Input mask | Definition of the field formatting (any number of characters, numerical characters or dividers, etc.). Even if the field is not a required field, it can be controlled how this field has to be filled. |
| Field name | Text that describes the field in the mask (external description) |

If you have activated "Show change details", you will receive the information as to how the change would be reflected in the hdhabcfg after activating the "Save" button in order to be able to check the changes again.

| | | |
|---|------|-------|
| <input checked="" type="checkbox"/> Show change details | Save | Close |
|---|------|-------|

| Status | N.. | DB | Action | Status | Record |
|--------|-----|-------|--------|--------|---------------------------------------|
| todo | 0 | hd... | UPDATE | before | 00100100000000100120GebDat 1500000 0 |
| | | | | after | 00100100000000100120GebDat 1500000 0 |
| todo | 1 | hd... | UPDATE | before | 00100100000000100119Eintritt1500000 0 |
| | | | | after | 00100100000000100119Eintritt1500000 0 |
| todo | 2 | hd... | UPDATE | before | 00100100000000100048FBelNr 1500000 0 |
| | | | | after | 00100100000000100048FBelNr 1500000 0 |

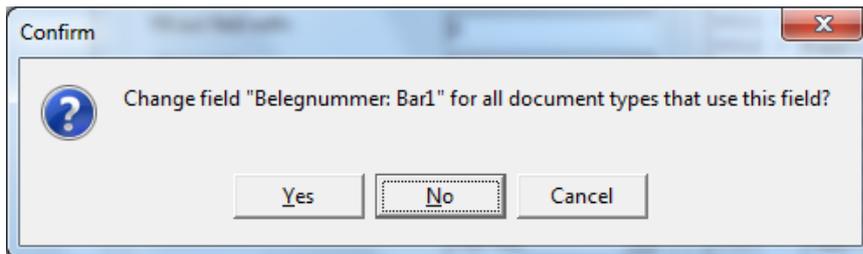
You can then undo the changes (F6) or execute them (F9). If you end the program, the change will not be adopted.

| | | | | |
|----------------------|--------------------|----------------|-------------------------|-------------|
| Undo everything (F6) | Back one step (F7) | Next step (F8) | Execute everything (F9) | Close (ESC) |
|----------------------|--------------------|----------------|-------------------------|-------------|

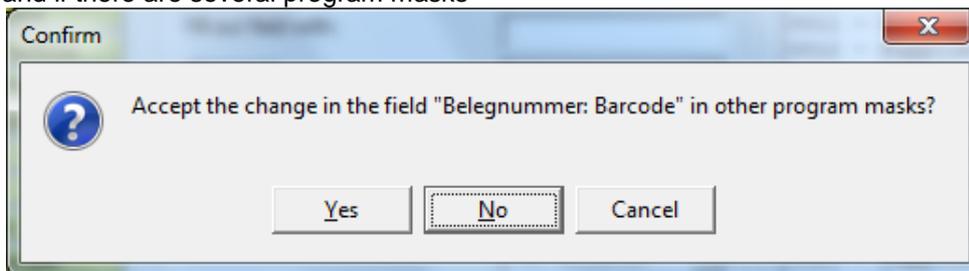
After successful saving, you will receive a corresponding confirmation.



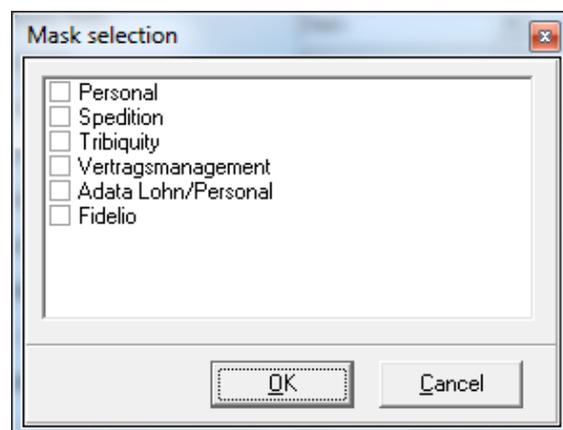
Changes that you make to field properties can also be automatically adopted for other document types and masks. If you have activated this function under menu *Settings – Ask about comprehensive changes each time*, you will receive the following queries:



and if there are several program masks

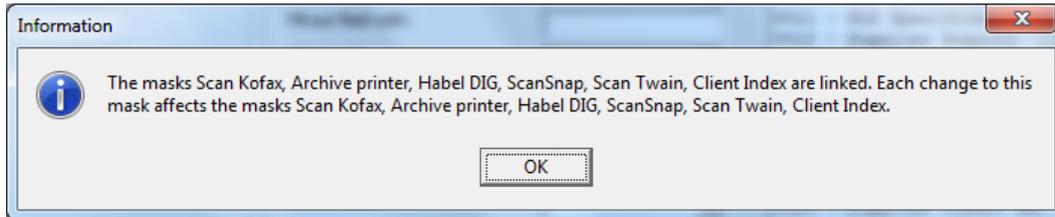


you can select the respective mask here.



Note:

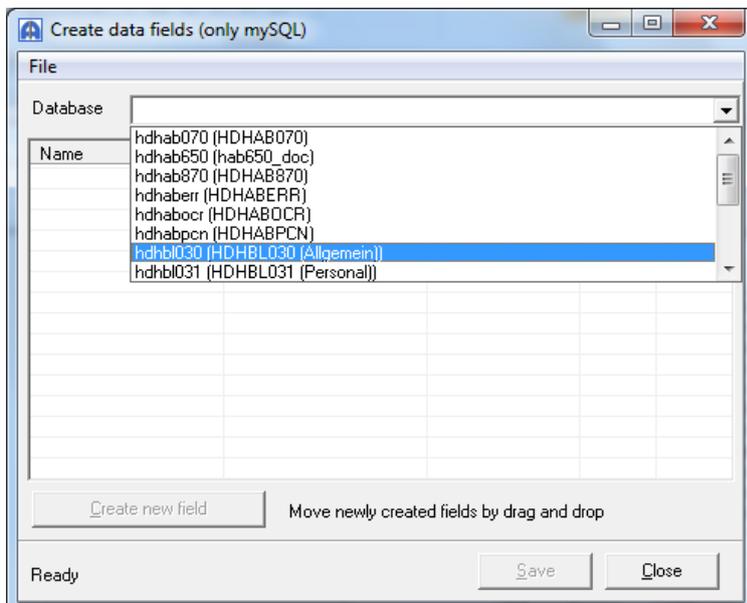
Subject to the requirement that the data entry masks are identical, changes in the masks of the data entry programs have reciprocal effects on each other.



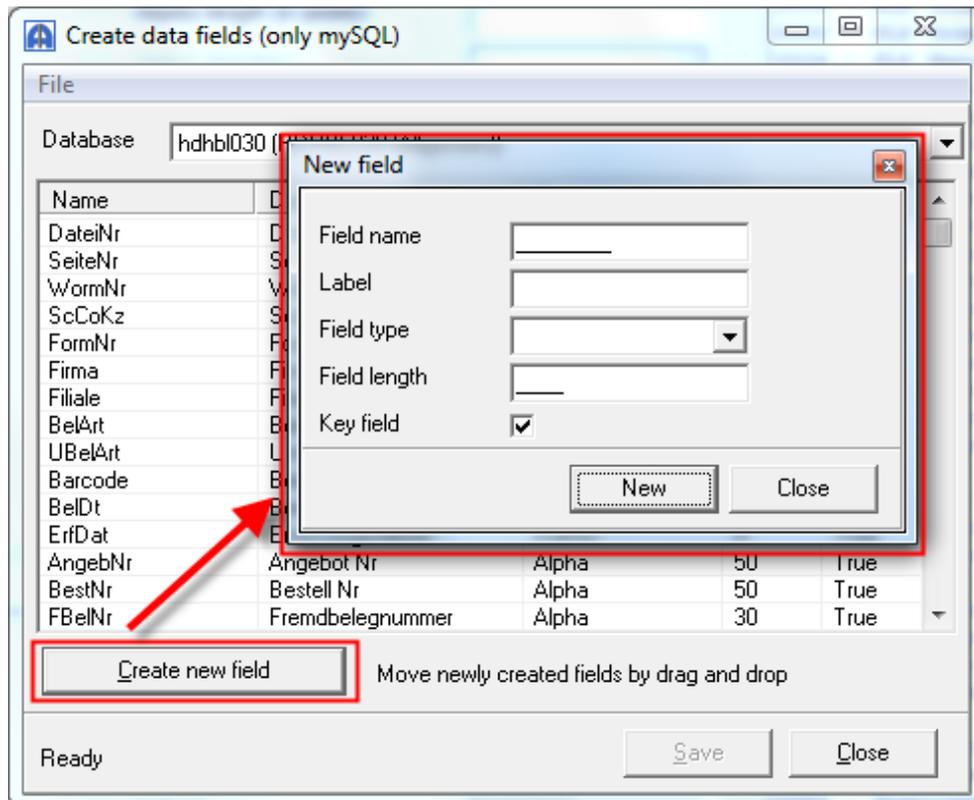
Masks are identical if the search criteria are identical and the field properties have identical characteristics. Although non-identical masks are more individual, they are more time-consuming to maintain.

5. Create new database fields

Database fields that have not existed up to now can be set up via menu access *Extras – Create new database fields*. After calling up the command, you will see a window in which you first have to select the database for which the database field is created. First start with the "Retrieval" document group. You will be automatically asked after creating new database fields whether you would also like to adopt the changes into the data entry mask. If database fields are created for the COLD archiving and the merging, you should start with the HDHAB070.



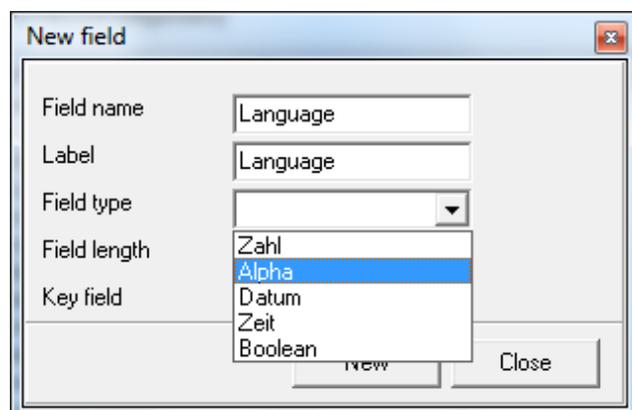
The existing database fields are displayed to you. You can reach the next menu via the "Create new field" button.



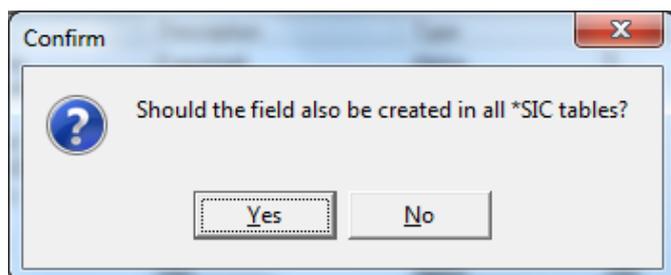
Please enter the queried criteria such as field name (internal description) and label (external description). Via Field type, you select the type of field (numbers, letters, date, time, yes/no).

By selection, the entry of the field length becomes active if it does not concern the date, time or Boolean field (here, the field length is defined in fixed form).

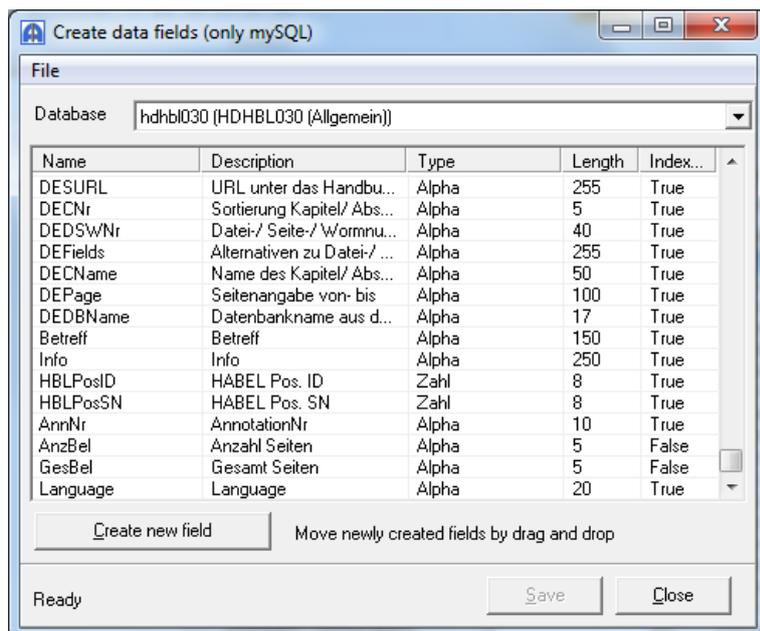
In order to include the field in the Aimdex or index, it must be defined as a key field. Only then is it possible to make a retrieval according to this field.



Before adoption of the new field into the database by activating the "Create" button, it is asked whether the changes should also be adopted into the back-up tables:



The field was adopted into the database and is now displayed without * in the table of the database fields. The newly created field will stand at the very bottom of the order of fields and should be correctly placed via Drag&Drop.

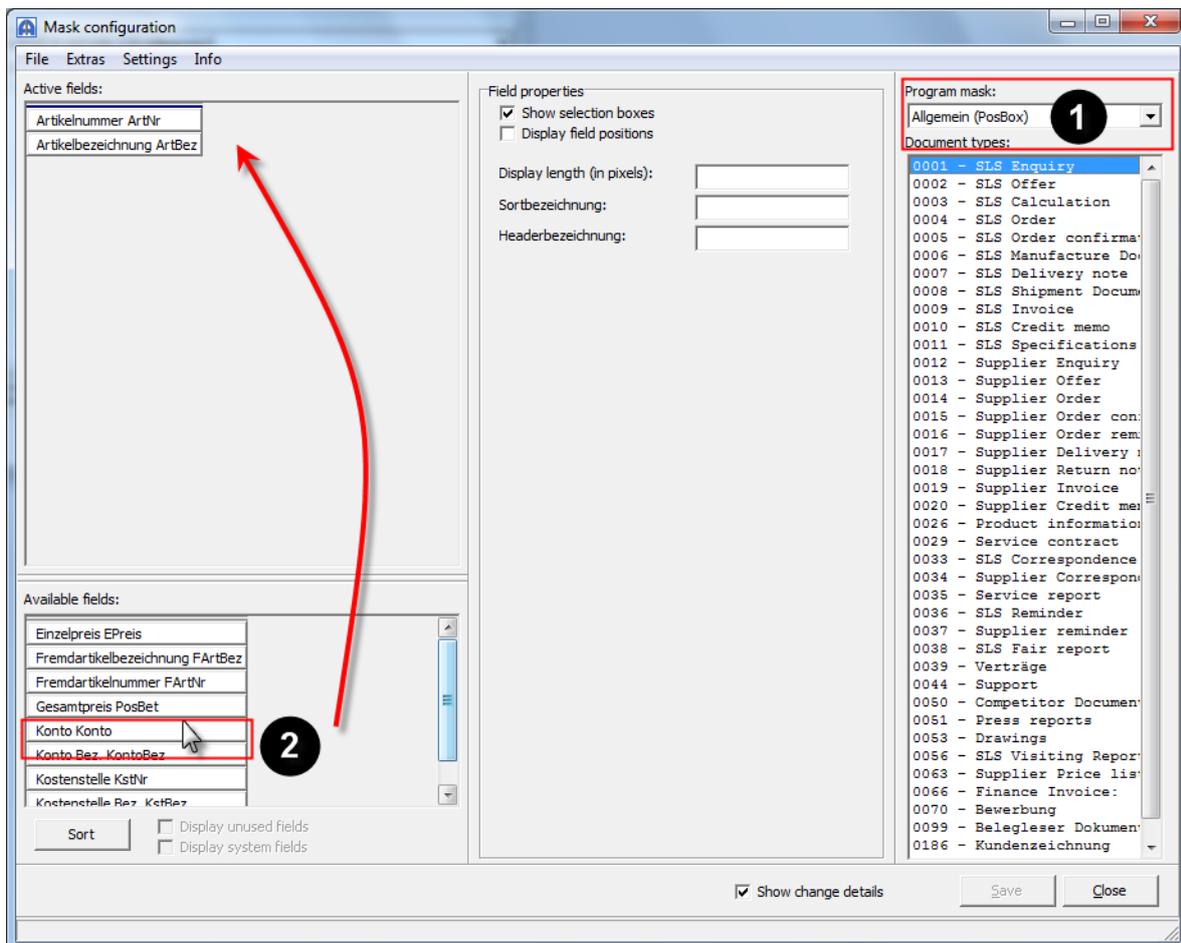


In order to be able to assign the field to the document types, you change back into the program mask and tick "Display unused fields" below "Available fields". The new field is displayed among the available fields and can be moved into the "Active fields" section. You can then also "fine-tune" the new field via field properties.

Note: New fields are automatically adopted into all databases that are defined as identical to one another. The fields are to be entered manually for all other databases.

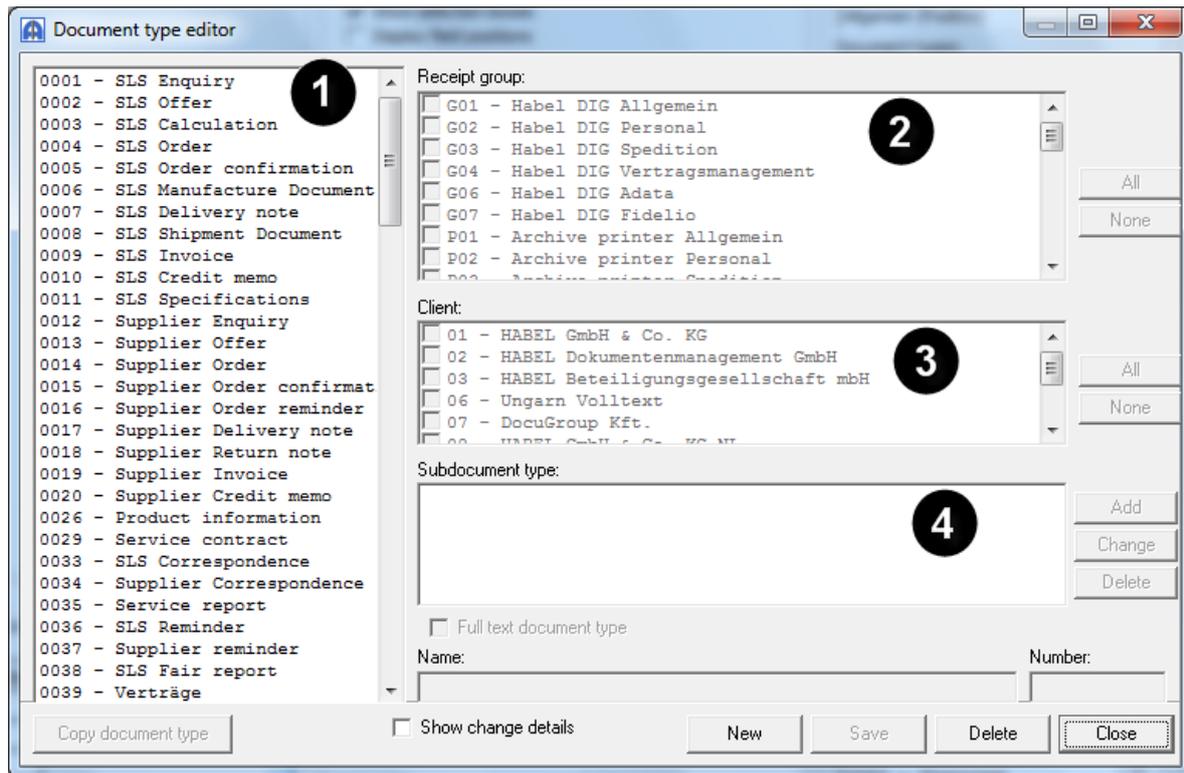
6. Administer item fields

In order to define database fields as item fields, a separate program mask is defined in the mask configuration for the respective database and mask (retrieval/data entry/post basket mask). If this is selected, you will see all the database fields displayed in the "Active fields" overview that have already been activated for recording items. In order to activate other fields to record the item, these are moved from the "Available fields" box into the "Active fields" box.



7. Document types administration

In order to create new document types, select the document type editor via menu access *Extras - Document types administration*.



Selection of the document type (1)

In the left-hand section, you can select the document type that you want to edit or use as a basis for a new document type.

Document groups (2)

The existing document groups are listed in the upper middle section. By selecting the check box, the respective document group is assigned to the currently marked document type. The selection can be speeded up by selecting "All" or "None".

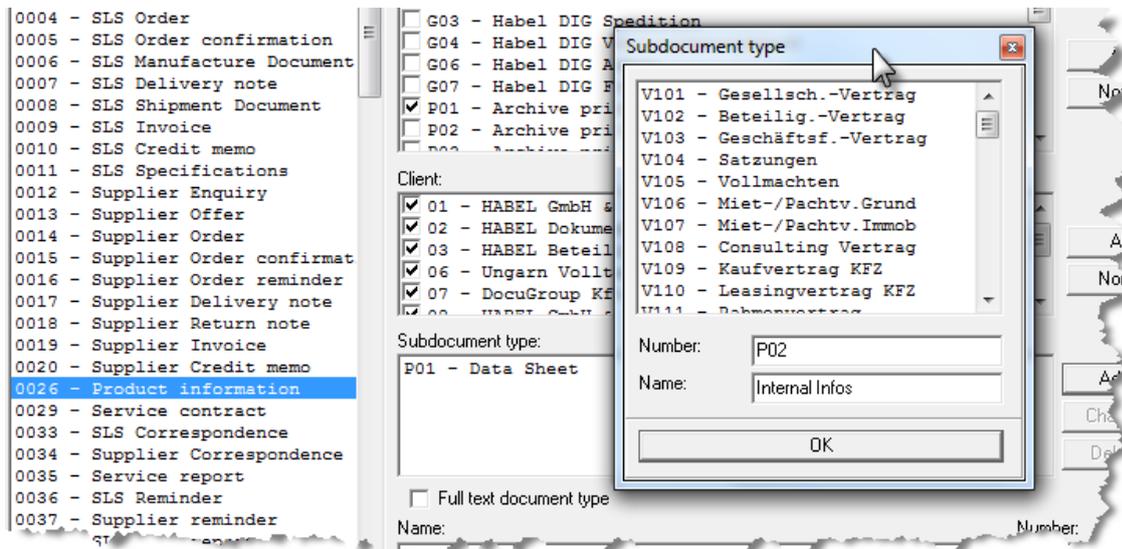
Client (3)

In the middle section, you select the clients in which this document type is to be active. Here too, you can use the "All" or "None" buttons.

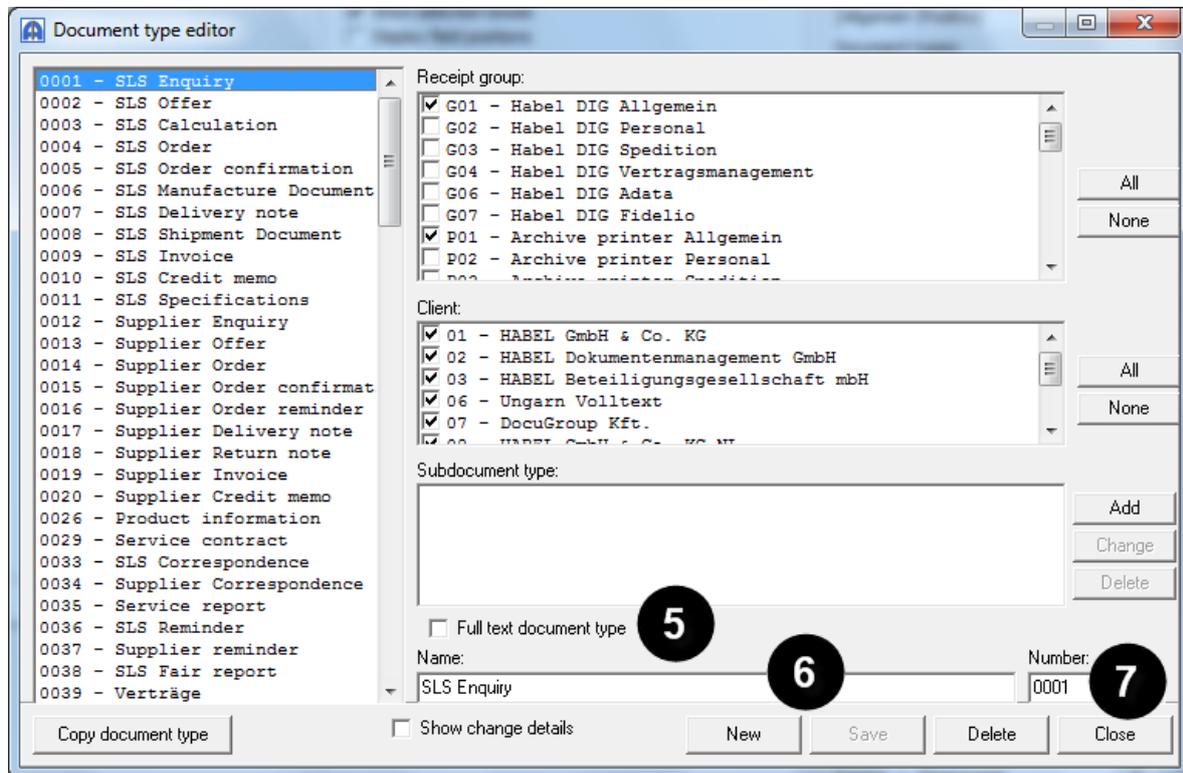
Sub-document type (4)

If the document type has a sub-document type, these are displayed here and can be amended ("Change" button: only the description can be changed) or deleted ("Delete" button). With the "Add" button, you create new/additional sub-document types for the selected document type. If you create new document types that should also have sub-document types, the new document type first needs to be saved and then selected to create sub-document types.

You are shown an input window with the option of entering the number and the name of the sub-document type. After confirming the input, this sub-document type appears in the overview.



For the definitive adoption of the new sub-document type to the highlighted document type, it is necessary to save it. If the saving process is forgotten and the user changes to another document type or if the program is closed, there is a prompt for confirmation whether the change is to be saved for the document type (in this case product information).



Full-text document type (5)

By selecting this box (provided that **HABEL FULL TEXT** and corresponding full-text licenses are in use), the highlighted document type is defined as a full-text document type (exception: COLD document types). Via Autojob, the documents archived in future in this document type are now fully text-indexed and can be searched correspondingly via full text (see II. Retrieval – full-text search). If documents are to be full-text indexed subsequently, this is not possible via this function. Instead, this must be done by HABEL.

Name (6)

Here, you can define the external description (i.e. the text as it appears in the mask as a description of the database field). The internal description cannot be changed.

Number (7)

Here, you can enter the document type key (is also a retrieval field in combination with the document type) (only possible for creation of new entry).



Copy document type

If you activate the "Copy document type" button, a new document type with the same criteria is prepared (the "Name" and "Number" fields are emptied). Please enter the new values in the "Name" and/or "Number" field and save the process. The new document type is inserted.

Show change details

As already with changes in the field properties, you can also display the details for changes in the document types and these are carried out in the hdhabpar in the background. With functional keys, you adopt the changes or undo them.

| Status | N.. | DB | Action | Status | Record |
|--------|-----|-------|--------|--------|--|
| todo | 7.. | hd... | UPDATE | before | HDALGBELEGART 0001 |
| | | | | after | HDALGBELEGART 000101;02;03;06;07;08;09;10; |
| todo | 7.. | hd... | DELETE | befor | HDALGBELEGART000100101;02;03;06;07;08;09;10; |
| todo | 7.. | hd... | UPDATE | before | HDALGBELEGGRP P0220082;0083;0084;0085; |
| | | | | after | HDALGBELEGGRP P0220082;0083;0084;0085;0086; |

New

With the "New" button, all activated fields for the document group and client allocation as well as for full text, name, number and sub-document are emptied. You can create the new document type by entering the name and number and carrying out the allocations to the document groups and clients accordingly. If the new document type is to be indexed by full text, activate the field "Full-text document type". The new document type is available to you in the overview on the left-hand side after saving.

Save

Creating new entries or changing document types is concluded by the saving process. For this, you use the "Save" button.

Delete

If you do not require any document types any longer, you can remove these via the "Delete" button. Please note that you will then only have access to documents that were archived under this document type during the retrieval without selection of a document type.

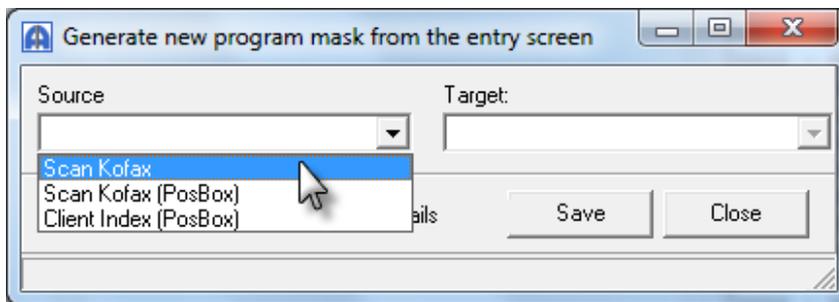
Close

To quit the document type administration, activate the "Close" button.

8. Creating and/or copying masks

New masks can be created under the menu item *Extras – Generate new program mask from the entry screen*. Masks can always only be generated from data entry masks as a retrieval mask has not usually defined any required fields or item entry.

The data entry program is to be selected as a source that is to provide the mask for another program (goal – selection of the databases already created). Irrespective of which program mask has been selected in the right-hand selection, only the masks which are possible for copying are displayed as a source.

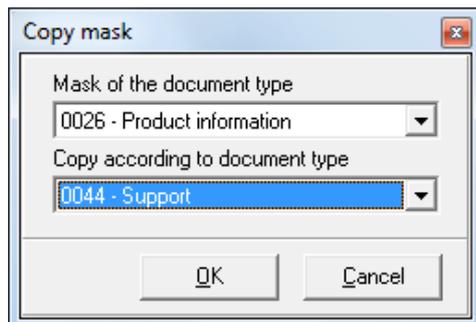


If you have activated "Show change details", you will receive an overview of the hdhbcfg with the changes carried out.

| Status | N.. | DB | Action | Status | Record |
|--------|------|-------|--------|--------|--|
| todo | 7... | hd... | DELETE | befor | 00100100000000200001Firma 40X101 0 00 |
| todo | 7... | hd... | DELETE | befor | 00100100000000200002Belart 40X001 0 00 |
| todo | 7... | hd... | DELETE | befor | 00100100000000200003BelDt 100F000 0 00 |
| todo | 7... | hd... | DELETE | befor | 00100100000000200004Barcode 200F000 0 00 |
| todo | 7... | hd... | DELETE | befor | 00100100000000200005AngebNr 200W000 0 00 |
| todo | 7... | hd... | DELETE | befor | 00100100000000200006AuftrNr 200W000 0 00 |
| todo | 7... | hd... | DELETE | befor | 00100100000000200007LfsNr 200W000 0 00 |
| todo | 7... | hd... | DELETE | befor | 00100100000000200008RechNr 200W000 0 00 |
| todo | 7... | hd... | DELETE | befor | 00100100000000200009GsNr 200W000 0 00 |
| todo | 7... | hd... | DELETE | befor | 00100100000000200010AnfrNr 200W000 0 00 |
| todo | 7... | hd... | DELETE | befor | 00100100000000200011BestNr 200W000 0 00 |

At this point, you have the option of undoing the change (F6) or adopting it after checking it (F9).

You can copy masks from document type to document type in order to adopt the same structure of database fields for the other document type. For this, you use the menu *Extras – Copy mask to* or the pull-down menu via a right-hand click in the area of the program mask selection. You will receive a selection window in which you select the source mask and the target mask.



The settings that have been made for the source document type (here document type 26) will be adopted for the target document type (here document type 24) after saving. Changes that are made subsequently to one of the two masks do not have any effect on the respective other masks as no link has been created as a result of the copying.

Delimitation "Generate new program mask from the entry screen" compared to "Copy mask to"
With "Generate new program mask from the entry screen", entire masks with their complete content incl. all document types are adopted; with "Copy masks to", a selection of the document type is necessary, which is why the masks can only be copied from document type to document type.

Error lists

1. General

With the introduction of the document management system, primarily in conjunction with the modules "Cold" and "Autoindex", a large number of rules is usually agreed, set up and activated. This set of rules results from specification/organization discussions. Errors may be a result of unknown processes as part of the archiving or due to deviation from defined processes.

For the editing of the errors, the so-called error lists (program *hphab755*), consisting of the "List of missing host data" and the "List of documents not yet scanned", are available. In the "List of missing host data", the transactions are listed for which there are no data for the indexing of the documents from another system such as ERP, financial accounting, etc.; in contrast, the "List of documents not yet scanned" includes the dossiers with which these systems have already supplied HOST data but no scanned document or archived dossier is available for this.

Terminology:

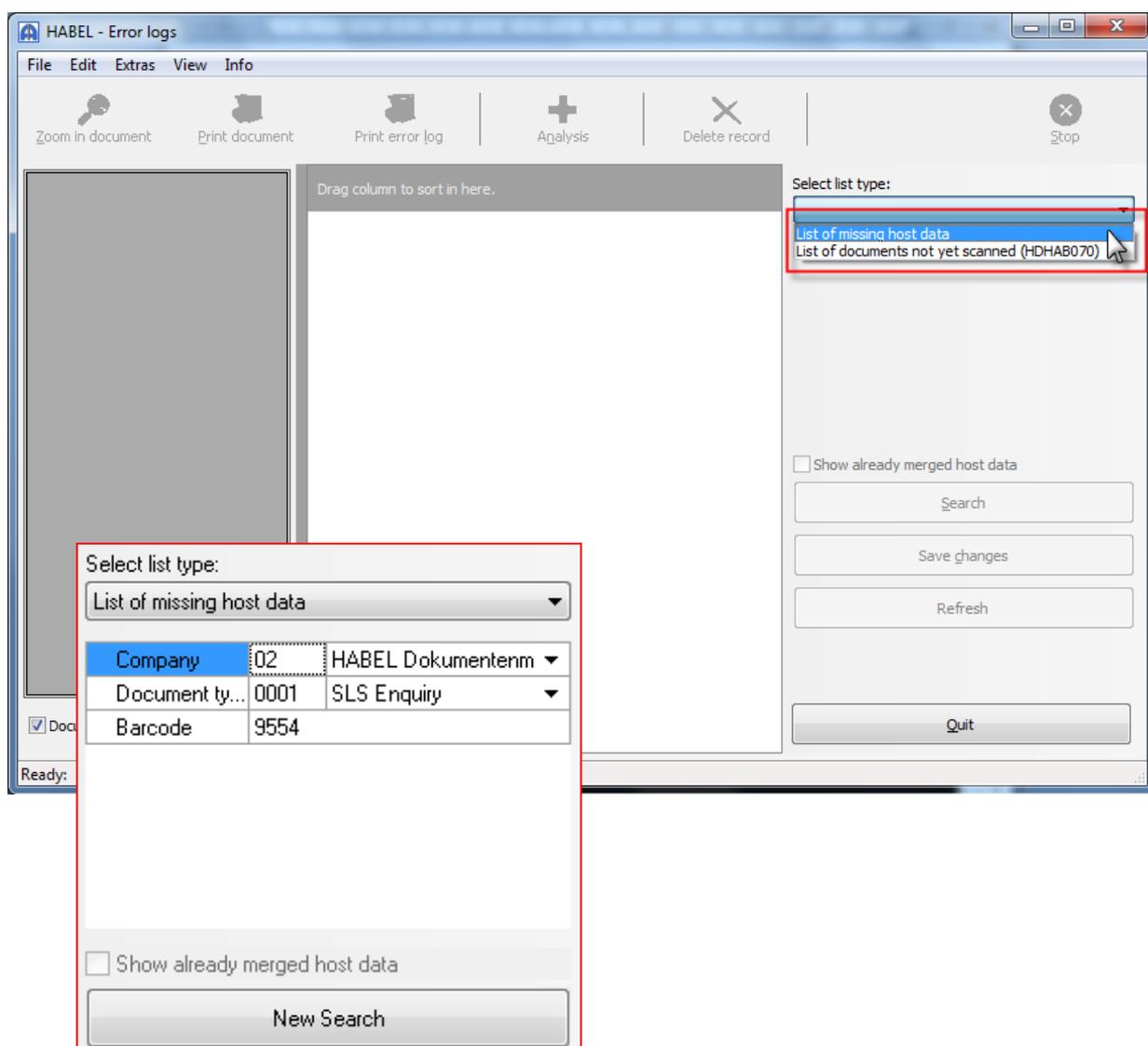
Host data are data that are provided by another system (e.g. ERP, financial accounting, HR, etc. or consignment data of a forwarding network). Host data are also called index data.

Merging means the bringing together of the index data with the respective document. For this, a unique criterion is awarded that is concluded in both the index data and in the document (for instance a barcode).

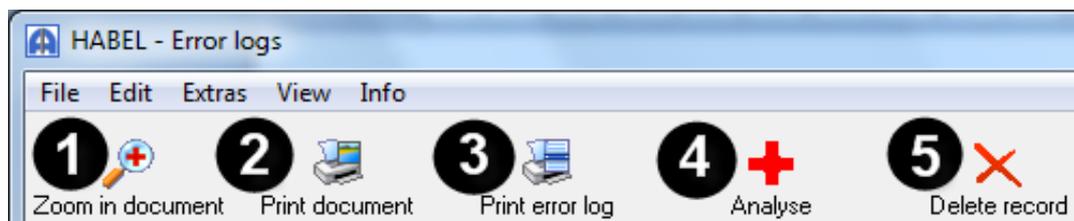
How such errors can occur and how they can be solved is dealt with in detail in the Error lists training. We therefore recommend that the employee responsible for the error lists participates in the training course. Note: The employee does not have to be an administrator.

2. Program structure

A program that contains both lists is available for the editing of the error lists. It can be selected via a selection box which of the two lists is to be currently edited. After selection of the list, various search criteria can be pre-defined for which the error entries are to be checked (e.g. different companies or individual document types and scanning periods). By activating the search button, the corresponding data are then displayed in the window.



Overview of the buttons and respective menu selection / functional keys

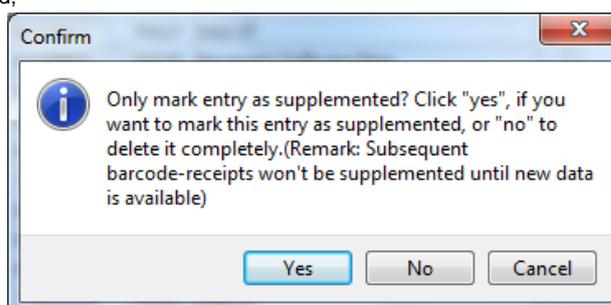


| Meaning | Explanation | Menu selection / Functional key |
|--------------------|--|--|
| 1 Enlarge document | The document is displayed in full-image mode. To close this preview, click on X | Display – Zoom in document F11 |
| 2 Print file | The document is printed out. | File – Print – Print document CTRL + D |
| 3 Print error list | The list (not the respective documents) is printed out. | File – Print – Print error log CTRL + L |
| 4 Analysis | Start the analysis (this point is dealt with in more detail below) | Edit – Analysis CTRL + W |
| 5 Delete record | Deletes the highlighted record from the error list (document remains in the archive). * Note: The hit list is updated after the deletion process has finished. | Edit – Delete record CTRL + R |

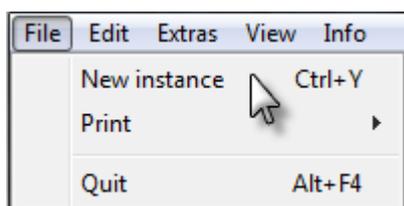
Note:

Zoom in document and Print document does not apply with the list of documents not yet scanned as no document exists there.

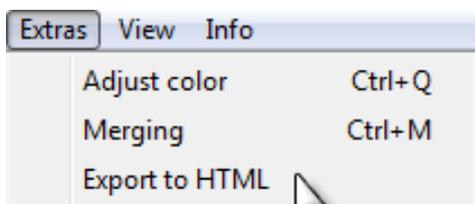
* If entries are to be deleted in the list of documents not yet scanned, the following query asks whether the entry should be deleted in full and thus not be available for further merging processes or should only be highlighted as merged.



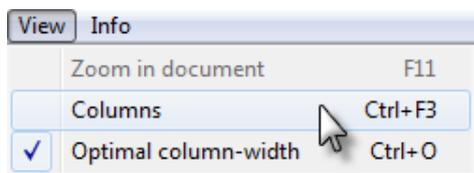
Additional commands that can be reached via the menu selection



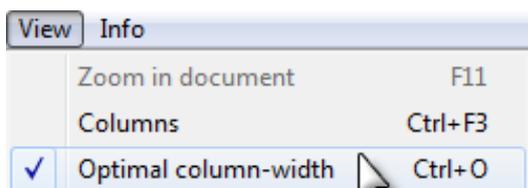
New instance in the menu file means that the program can be opened again in order to call up e.g. other error lists in parallel.



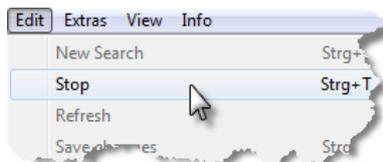
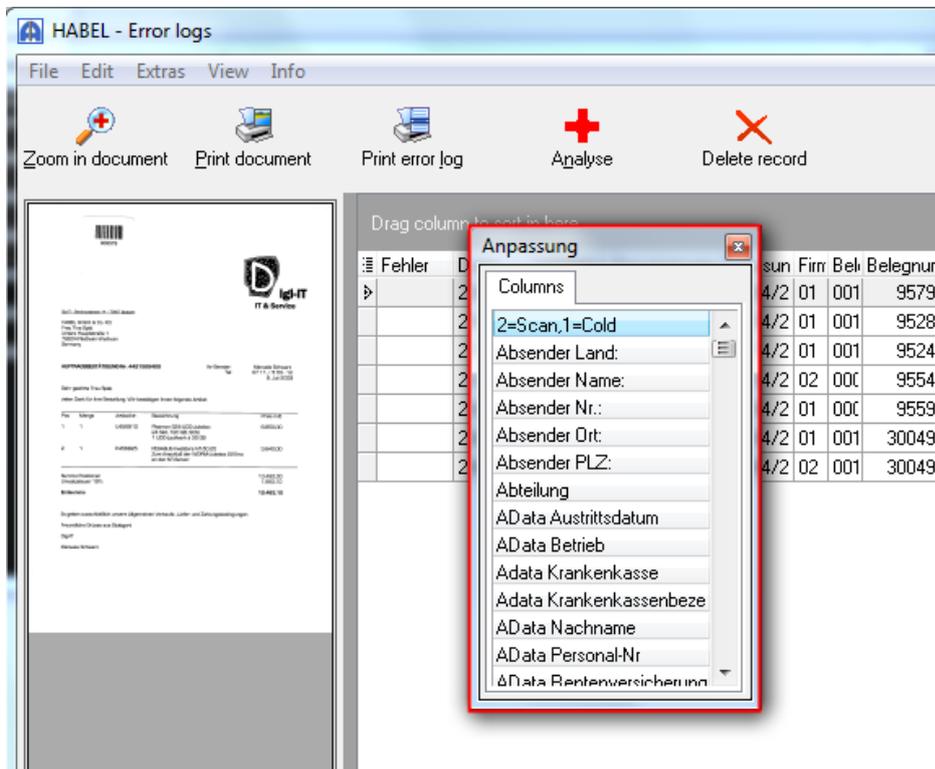
With the command "Export to HTML", the table displayed in the error list can be exported to HTML.



With the command "Columns" under the "View" menu, additional columns can be adopted into the hit list.



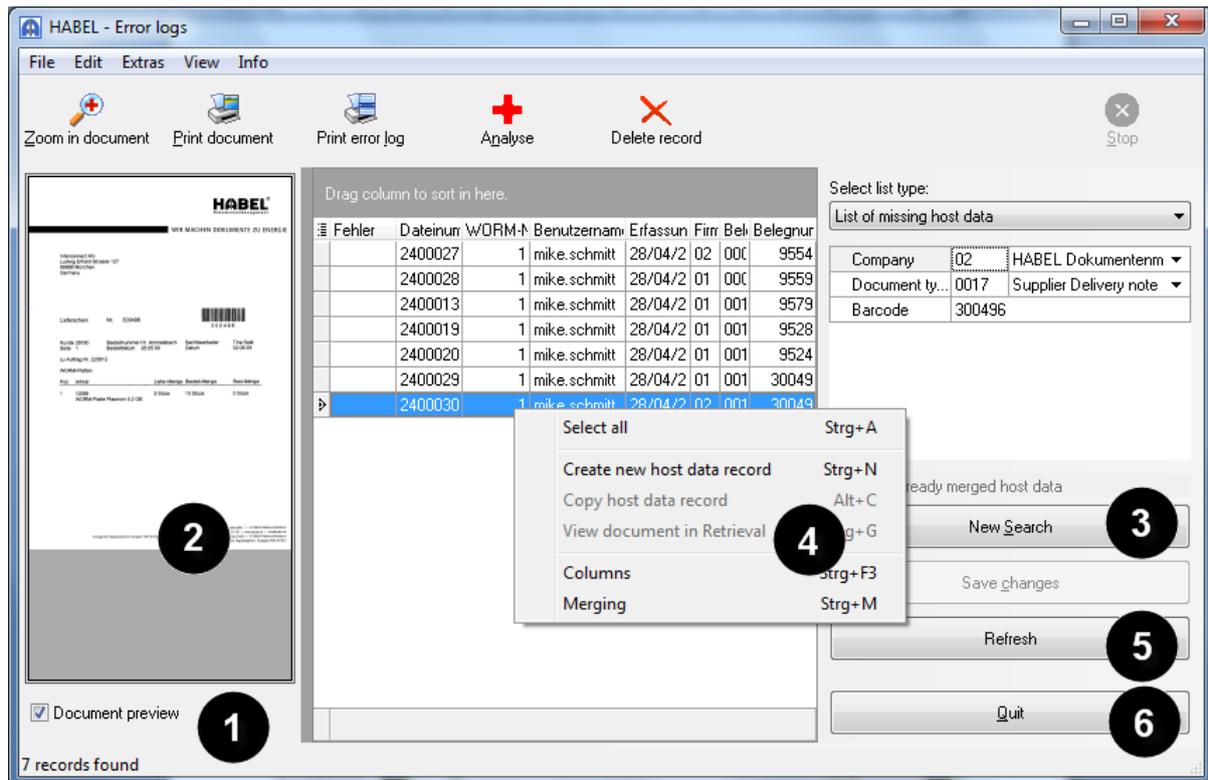
With "Optimal column width", you can adjust the hit list.



With the Stop command (or CTRL + T), queries (e.g. analyses) that last a long time can be stopped. The command is only active when a stop is also possible.

3. List of missing host data

To edit the list of missing host data, you activate the document preview (1) so that the document which is in the retrieval is displayed to you for each selected process (2).



By activating the button "New search" (3), the entered criteria can be emptied. It can also be reached via menu selection *Edit – New search* or functional key combination CTRL + S.

When using the separate module **HABEL CONNECTION plus** there is a command available via the pull-down menu (right-hand mouse key on the hit list entry) (4) with which the document can be displayed directly in the retrieval or access is possible for the selection of the columns.

If you have carried out changes, the "Refresh" button (5) is available and with this you can restructure the list.

Via the "Quit" button (6), you can end the entire program, in addition to menu access or X.

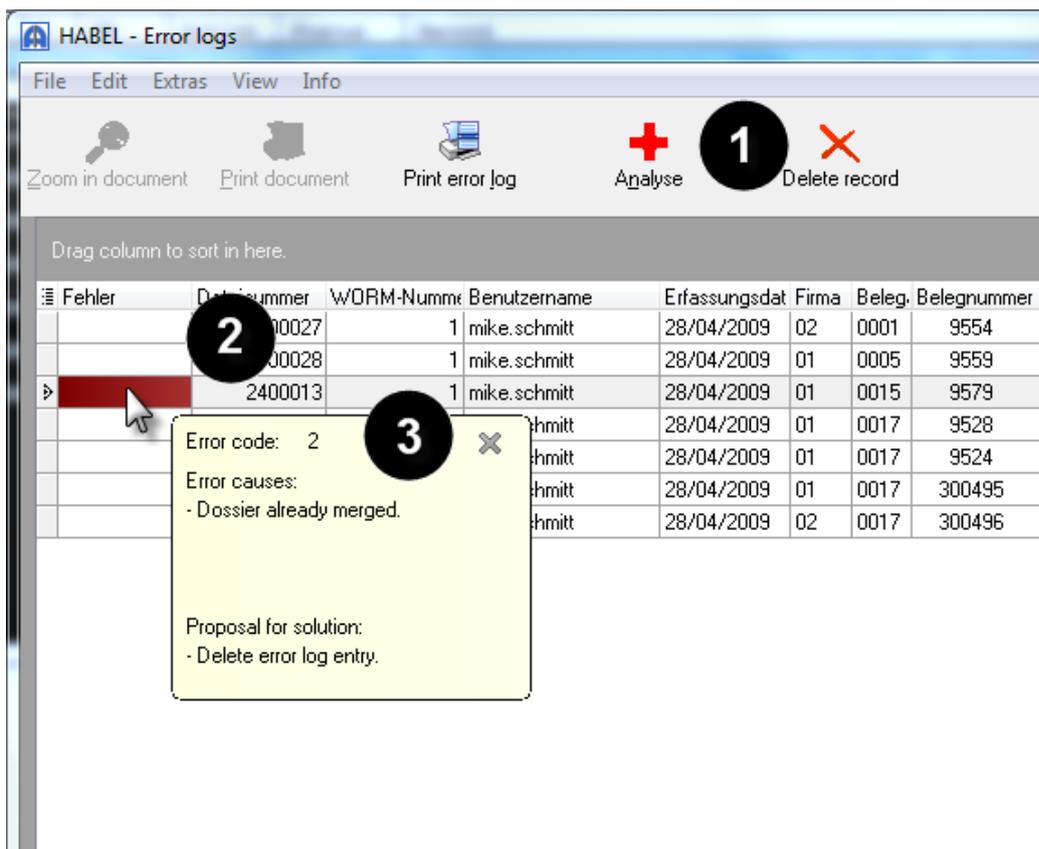
Grouping and sorting options in the error list

By simply pulling the required fields into the grouping field above the columns, the hit list is displayed in grouped form. Groupings can be done based on all (and also several) fields. This means e.g. that processes that consist of several pages can also be combined in a clearly structured manner. By clicking on the respective column, this can also be sorted. The sort direction is displayed by the triangle on the column title.

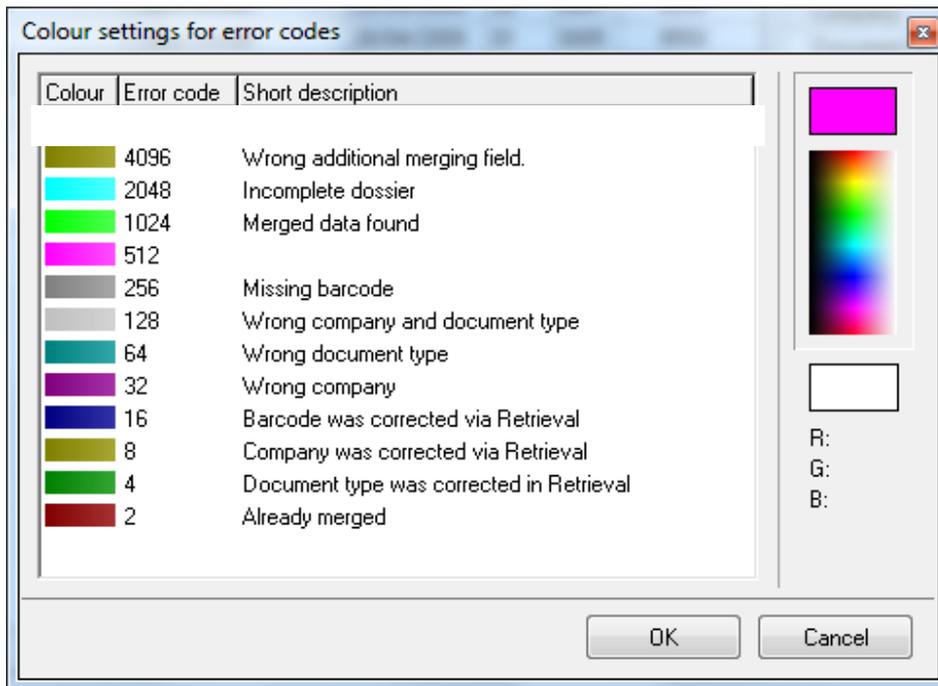


Analysis (only with the use of MySQL database)

After pressing the Analysis button (1), proposals for solution are displayed per highlighted line. These are highlighted in color (depending on error) (2) and described in detail via a comment window (3).

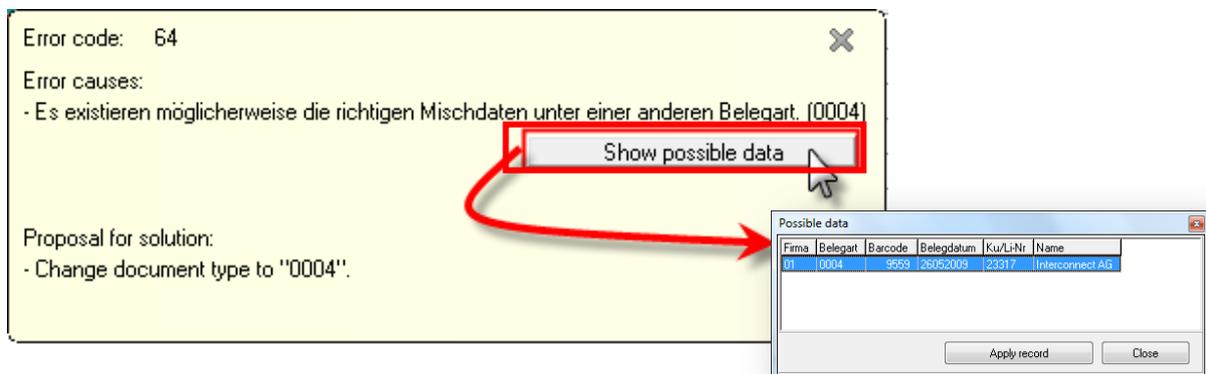


The following error codes are set as a standard. The color highlighting can be adapted individually via the menu - Extras - Adjust color or functional key combination CTRL + Q.

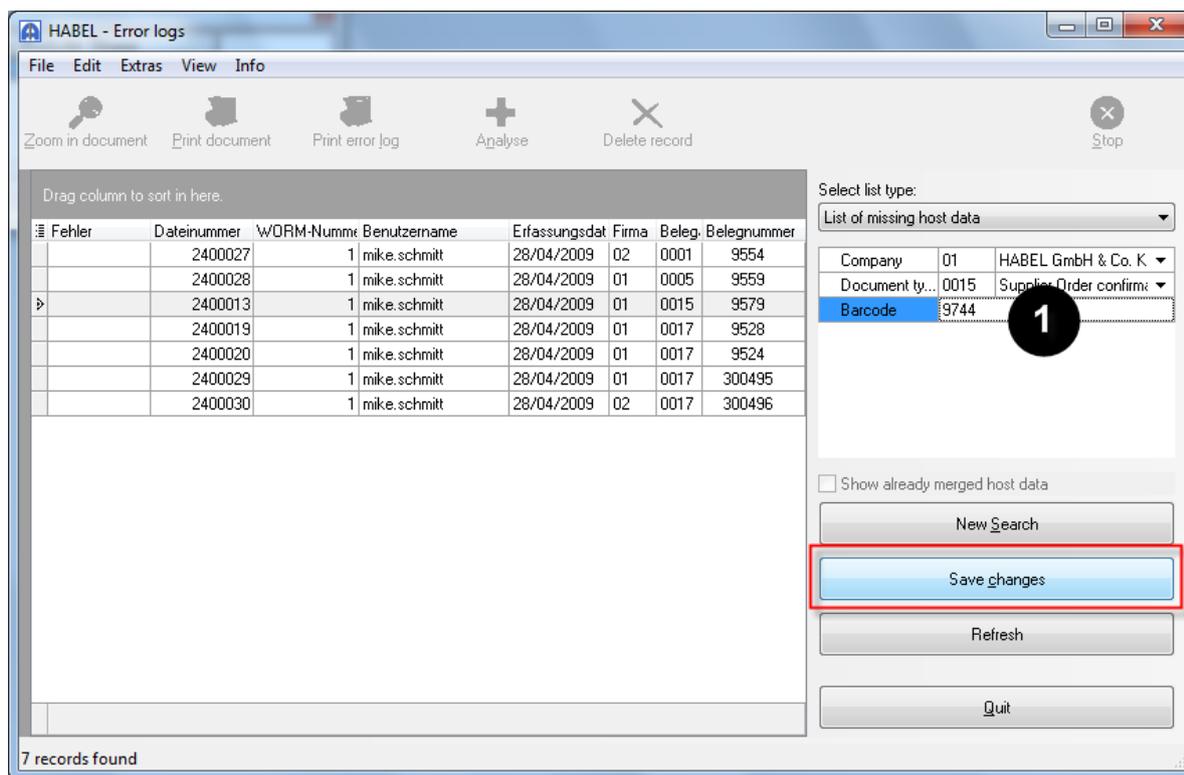


The errors and solution proposals need to be checked. With the following error codes, a correction is proposed by the program:

- 512 Barcode wrongly aligned
- 128 Wrong company and document type
- 64 Wrong document type
- 32 Wrong company



If merged data are available that could, however, not be assigned to the document due to the wrong barcode no., a correction is possible in the error list (1).



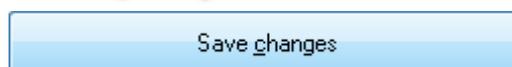
| | | |
|----------------|------|------------------------|
| Company | 01 | HABEL GmbH & Co. K |
| Document ty... | 0015 | Supplier Order confirm |
| Barcode | 9744 | |

For the change, click on the corresponding field in the right-hand section. Please note that always only the entry of the highlighted line is changed.

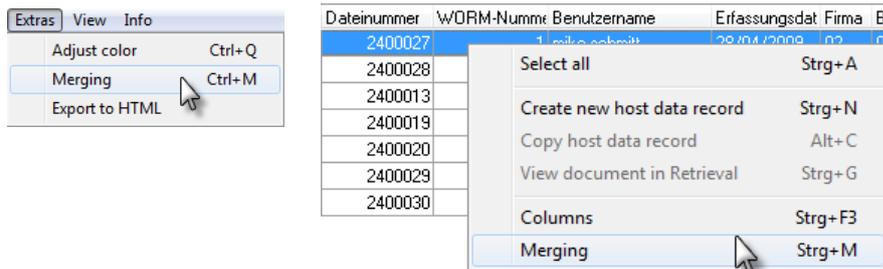
If you would like to change the entire dossier (e.g. all pages of the document), highlight all the lines that belong together by clicking on them with the CTRL key (2) pressed down.



The data are adopted with the "Save changes" button or menu *Edit – Save changes* or CTRL + E.



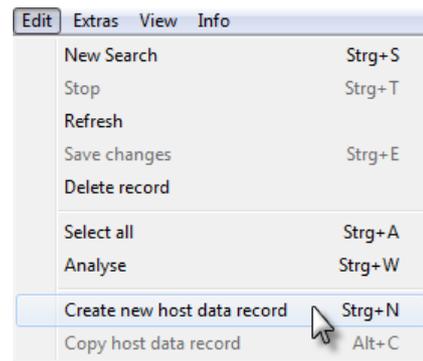
In order to be able to link the data with one another and to be able to classify the correction in the error list as correct, the merging can also be started manually at this point. For this, select in the menu bar the entry *Extras - Merging*, the functional key combination CTRL + M or the pull-down menu. The data are merged by transfer program; the entry no longer appears any more in the list.



Error code 1024 merged data found is also corrected with the manual starting of the merging.

With dossiers for which no host data are provided any more, there is the option of creating a new host data record. This is done via the menu *Edit - Create new host data record*, functional key combination CTRL + N or pull-down menu.

A separate data entry mask opens up (see next page), in which all search terms are entered and can be assigned to the document using the identical barcode number. When the host data record is created, it is checked whether the host data already exist in this combination – if this is the case, you will receive an error message.

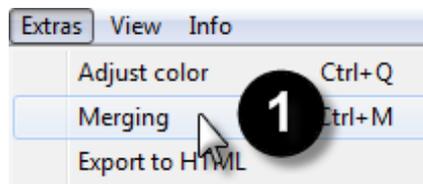


| | | |
|---------------------|-------------|-------------------------|
| Company | 02 | HABEL Dokumentenmana... |
| Document type | 0001 | SLS Enquiry |
| Document No. | 0000009554 | |
| Document date | | |
| Offer No. | | |
| External Docum... | | |
| Order No.(intern... | | |
| Delivery Note No. | | |
| Invoice No. | | |
| Customer/Supp... | | |
| Name | | |
| PLZ | | |
| Location | | |
| LKZ | | |
| Article No. | | |
| Article name | | |
| Serial No. | | |
| Subject | | |
| Info | | |

Buttons: Create record, Cancel

Note: Fields marked in bold represent the key for the merging database and should be filled.

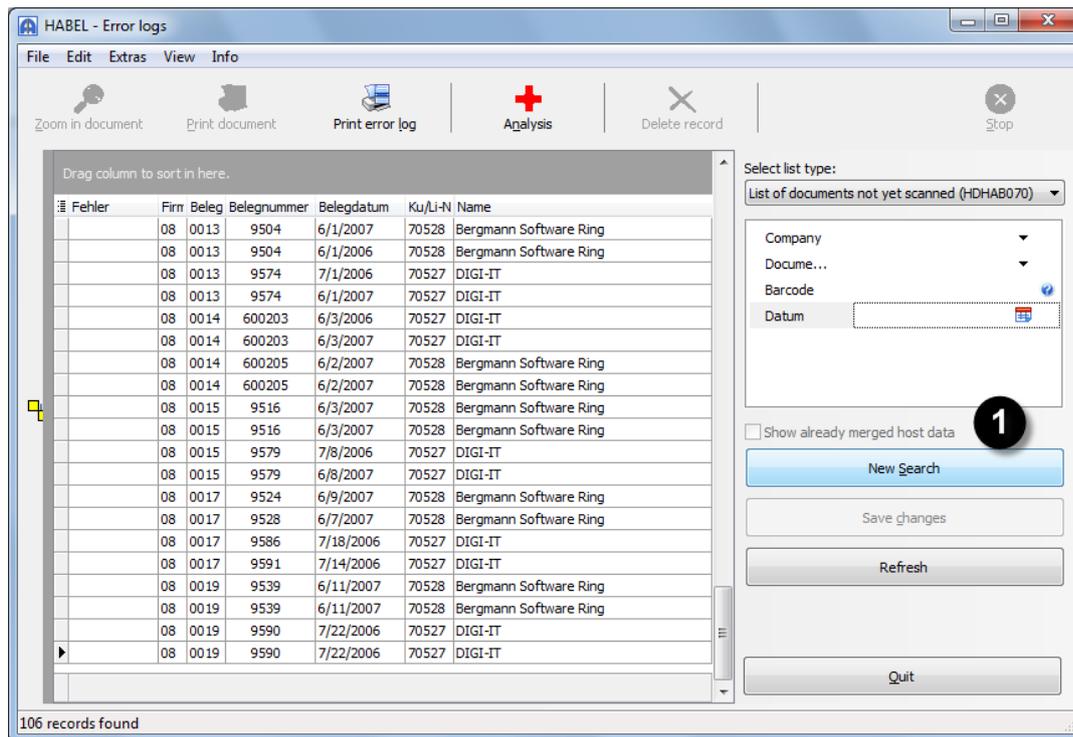
The host data record is included in the list of documents not yet scanned and linked after manual merging (1) via the menu *Extras* – *Merging* or the functional key combination CTRL + M with the appropriate document.



In order to update the list after the merging, use the "Refresh" button.

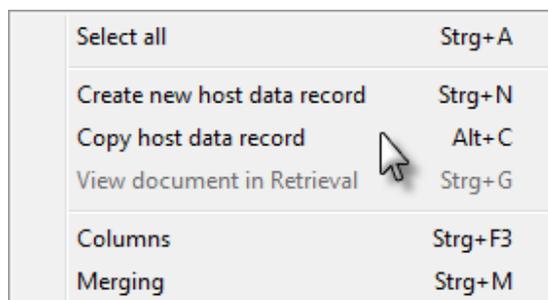
4. List of documents not yet scanned

In the list of documents not yet scanned, there is also the possibility of filtering according to selected criteria or to have all the data displayed. The hit list displays all host data that were handed over from other systems and cannot be assigned to any document.



Already merged dossiers can also be displayed if "Show already merged host data" (1) is activated before clicking the "New search" button.

Host data records can also be copied in this list and these can be used for documents that exist in the list of missing host data. This is done via the menu *Edit – Copy host data record*, functional key combination CTRL + C or pull-down menu.



The following data entry mask appears and is already filled with data that correspond to the selected data record.

| | | |
|----------------------|-------------------------|------------------------|
| Company | 08 | HABEL GmbH & Co. KG NI |
| Document type | 0013 | Supplier Offer |
| Document No. | 9574 | |
| Document date | 01/07/2006 | |
| Order No. | 600203 | |
| External Docum... | 3348761589 | |
| Order No. (intern... | 225615 | |
| Delivery Note No. | | |
| Invoice No. | | |
| Customer/Supp... | 70527 | |
| Name | DIGI-IT | |
| PLZ | 7206 MK | |
| Location | Winterswijk | |
| LKZ | NL | |
| Article No. | 10099 | |
| Article name | Plasmon G24-UDO-Jukebox | |
| Serial No. | | |
| Subject | | |
| Info | | |

If the data are not to be adopted in identical form, changes are to be carried out directly in the data entry mask "Create host data". After the record has been created, this is to be found in the list of non-scanned documents and is linked with the appropriate document based on the barcode number after manual merging.

Analysis (only with the use of MySQL database)

After pressing the Analysis button, proposals for solution are displayed per highlighted line. These are highlighted in color (depending on error) and described in further detail via a comment window. Here, there are the error codes known from the list of missing host data (with the exception of the codes that can be attributed to changes in the retrieval). In addition, there is also the error code 0 "Error unknown (e.g. the dossier is not available or the document still has to be scanned).

Drag column to sort in here.

| Fehler | Firm | Beleg | Belegnummer |
|--------|------|-------|-------------|
| • | 07 | 0012 | 500018 |
| • | 07 | 0012 | 500018 |

Completeness check

1. General

Serial numbers are awarded in your ERP program for offers, order confirmations, delivery notes and invoices. You can check using the module **HABEL CONTROL** whether the documents in the archive are complete with regard to these numbers.

The program hphab310 is started via the icon.



2. Program structure

In the upper part of the program, you select the database, the company, branch, document type and sub-document type (depending on request), via which you would like to carry out the control (1). To empty selected entries, you activate the back key on your keyboard.

Zeitraum: BelDt [] [] []

Belegkreis: Barcode [202130] [202150] Maske: []

Schritt: [1]

Zusammenfassen? Neu selektieren

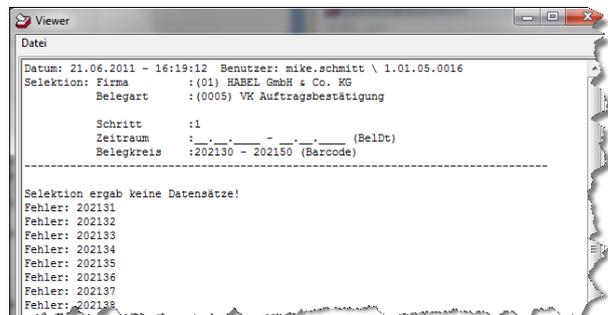
At the bottom, you enter whether you would like to check over a certain period of time (selection of all date fields possible) or via a certain group of documents (selection of defined fields that can contain numbers as a value is possible). In the "Mask" field, you can also store conditions that are complied with for this document group (e.g. only 6-digit numbers, etc.).

Via the "Increment" selection field, you define at what intervals the search should be done from one number to the next (1=every number, 2=every second number, etc.).

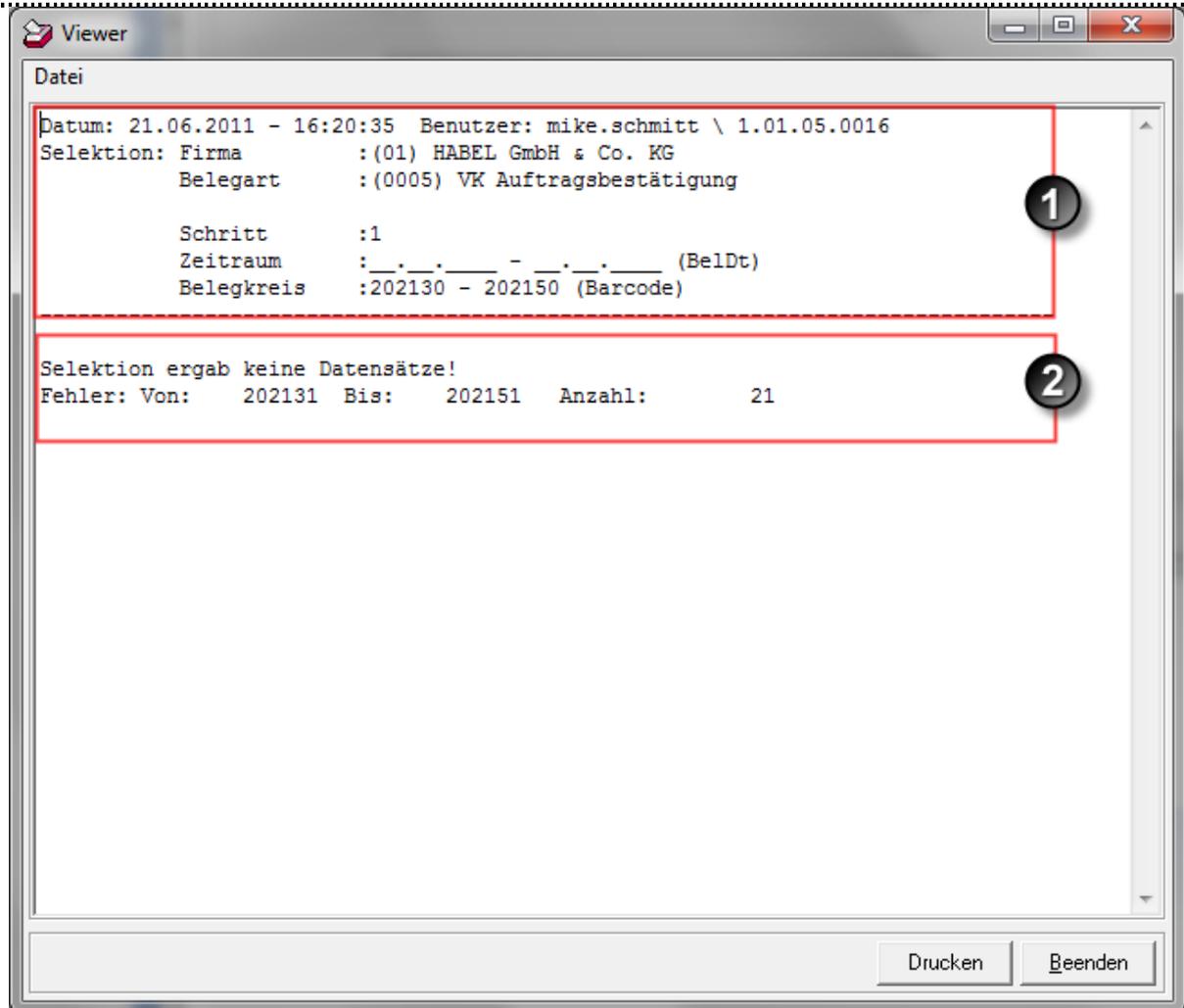
You can control the type of depiction with grouping:

Group = Yes
(Depiction of results from ... to)

Group = No
(Depiction of results individually)



3. Result



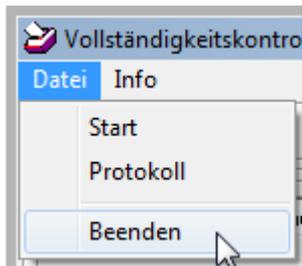
As a result, you receive an overview of the selection criteria (1) and the errors (2).

An error is when document numbers that cannot be found in the defined field in the archive are displayed.

The group of numbers (with grouped display) that is missing and the number are displayed. In this case, the document numbers 225612 and 225615 are available in the system; the others in the document number group 225600 to 225680 are missing.

With the "Print" button, this overview can be printed out; with "Quit" you can return to the selection program for the next test run. Incidentally: The values entered in the selection fields are retained so that it is possible to recognize the number or period reached in the previous search when they are next called up.

4. Menu bar – Symbols



Via *File* menu, you can access various commands that are also available as symbols.

Start 

To start the program and display the results log based on the currently selected criteria.

Log 

To display the result log based on the currently selected criteria.

Quit 

Quits the program.

Autojob

1. General

The Autojob is responsible for the time-controlled (or triggered), automatic processing of stored jobs/routines such as e.g. the adoption of COLD documents, the import of master data or the back-up of the MySQL databases. The program activities are logged and on request, the data can be outputted on a printer or any mail recipient. As a general rule, the log must be checked on a daily basis as errors in the processing are listed in this log, and also in combination with the update service information about updates is given, which should be called up, if critical.

You can gain access to the Autojob via the program hphab805 and icon.



Autojob

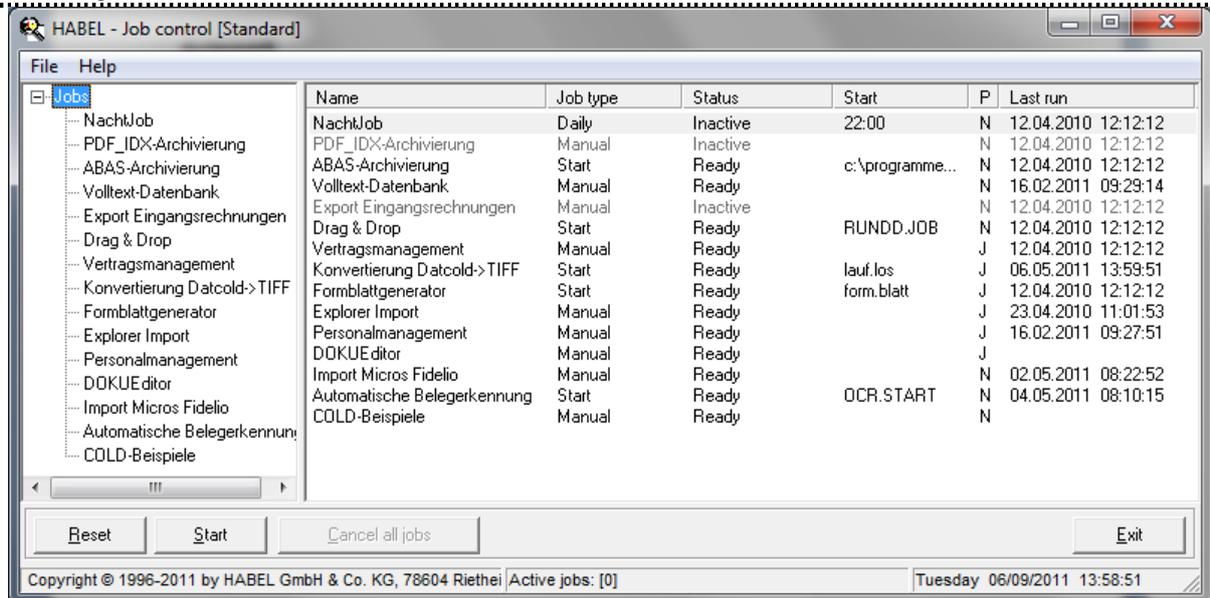


So that the Autojob can process its tasks, this must be active on the server at all times. If the program is closed by mistake, it has to be started manually.

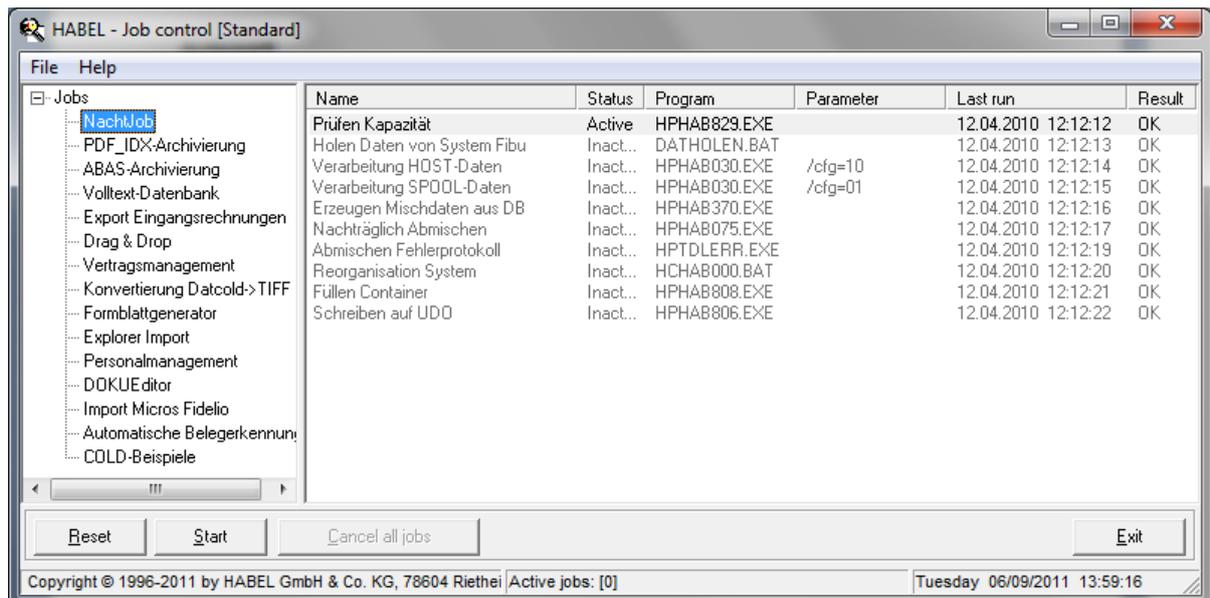


Programs (exe files) that are started with the Autojob are to be placed in the 32-bit directory; commands (batch files) are to be kept in the GEDOSOD directory.

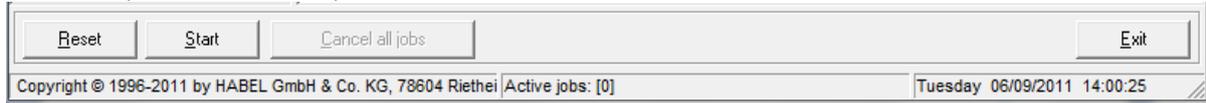
2. Program structure



By clicking on "Jobs", an overview of the jobs in the Autojob are displayed and these are described in more detail on the right (name, job type, status, start, print, last run). When one of these jobs is clicked, the activities with the respective status are visible (see illustration below). For instance, it is explained which steps are carried out within the night job, what the status is, what program/what parameters is/are affected, and the time of the last run and the result.



In addition, to the File menu, various buttons are also available:



In order to reset canceled jobs for the next run, you can press the *Reset* button. Note: There are reasons for canceled jobs (errors, wrong processes, etc.). It is therefore important initially to check why the cancelation occurred. If the job is not reset, the other jobs that follow and which may be based on it are carried out nevertheless. This could result in additional errors under certain circumstances. In order to stop the following jobs too, the *Cancel all jobs* button is to be activated.

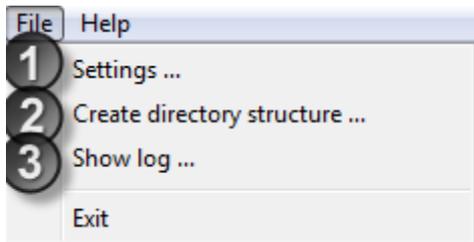
With *Start*, individual jobs can be started manually, independently of the stored interval. For this, the required job is to be highlighted on the left. The job can then be initiated with "Start" and stopped with "Stop".



With *Exit* the program is ended; the jobs are **no** longer executed.

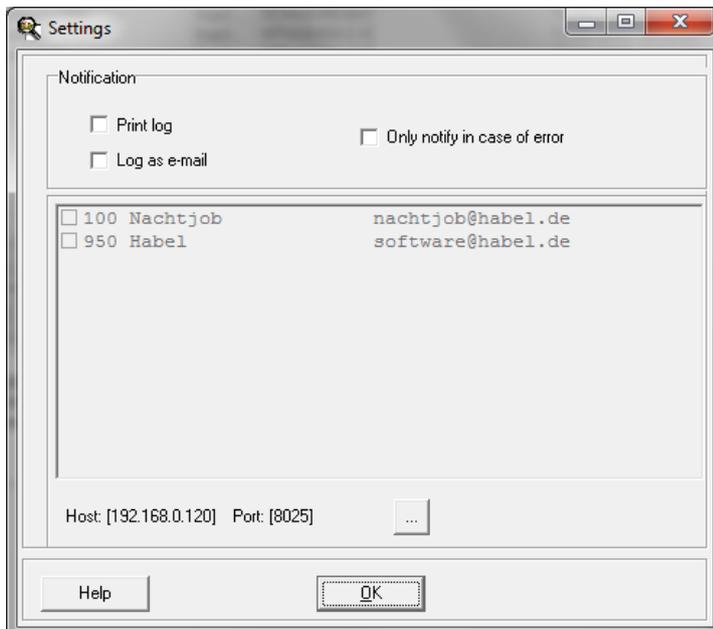
Jobs that are based on one another and have defined temporal sequences may be placed in the queue if the previous job has not yet been fully processed. In addition, the usage of the Autojob (execution of further commands, manual starts, etc.) is blocked as long as there are still active jobs running.

3. Menu bar



Within the "File" menu, various functions are available.

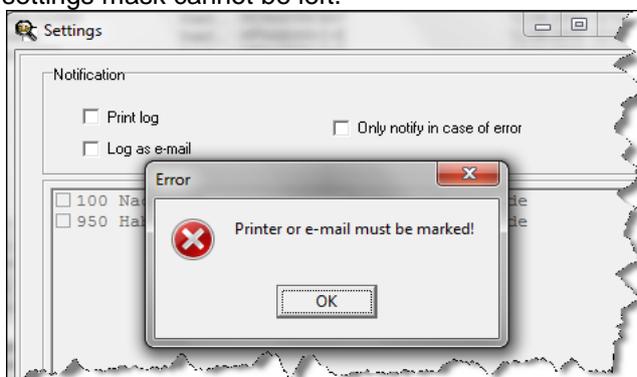
With settings (1) various *Settings* can be made for the log.



It is defined, for instance, whether the log is printed (on a Windows standard printer) or sent by e-mail. It can also be set whether the notification is only given e.g. with errors.

If it is sent by e-mail, a choice of recipients is available. To appear in this list, the storing of the e-mail address is necessary in the user administration (hphab603). A connection to the mail server is the requirement for sending e-mails. This connection can be checked via a click on the host/port.

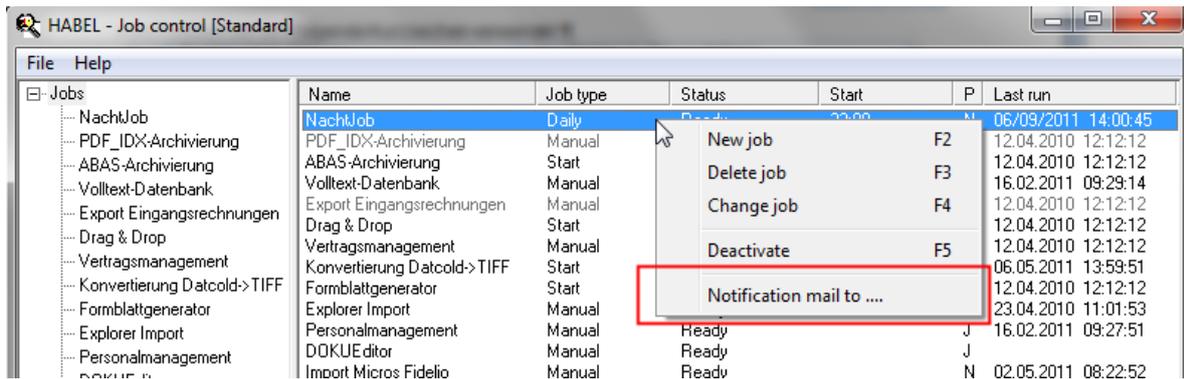
settings mask cannot be left.



If no selection has been made, this

IV. Administration
HABEL AUTOJOB

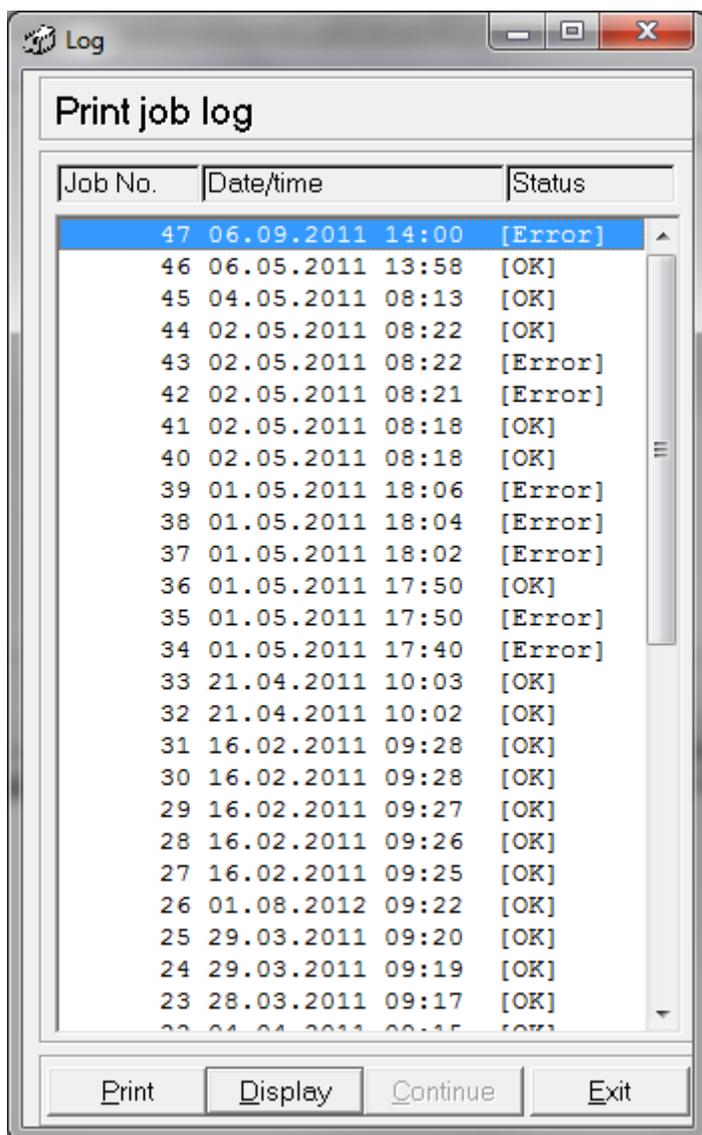
In addition, notifications about individual jobs can be sent to special e-mail addresses. These notifications will be sent with each individual run. To store a recipient, the dialog menu is opened by clicking with the right-hand mouse button on the respective job and selecting the command "Notification mail to...". As with the general notification, a selection can also be made here from all HABEL users stored with an e-mail address.



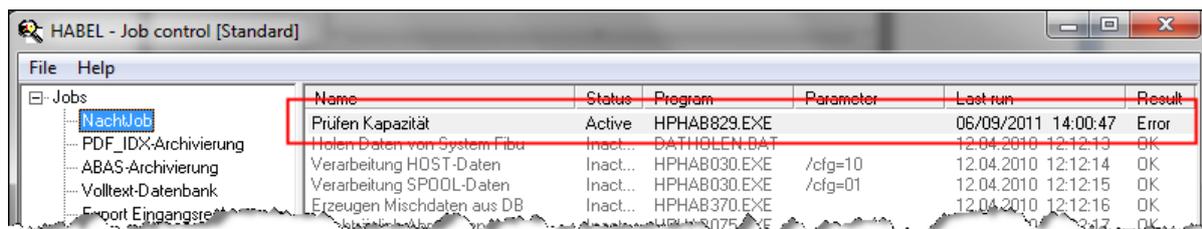
The *Create directory structure (2)* menu item is reserved for the HABEL employees or can be used by the administrator after corresponding instruction. Here, no changes should be made here as otherwise it could result in problems in the storing of the documents.

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The log can be selected under *Show log (3)* and be printed. With "Display", the log of the erroneous job can be viewed.



The Autojob is to be checked every day. Despite the tools, such as notification by e-mail, it can only be ensured via the daily control that no deviations or disruptions have occurred. If there were errors in an activity, this is depicted in red and marked with the word "Error" as a result. In the job log, additional information is provided on what caused the error.



The following abbreviations are used in the log:

- > Start of an activity
- .. Interim logging
- <- End of an activity
- .! Error in this activity
- .? Warning in this activity

When reading the log, all entries with .! and .? indicate errors and/or irregularities. In the present example, the cause of the error is a lack of data definition.

```

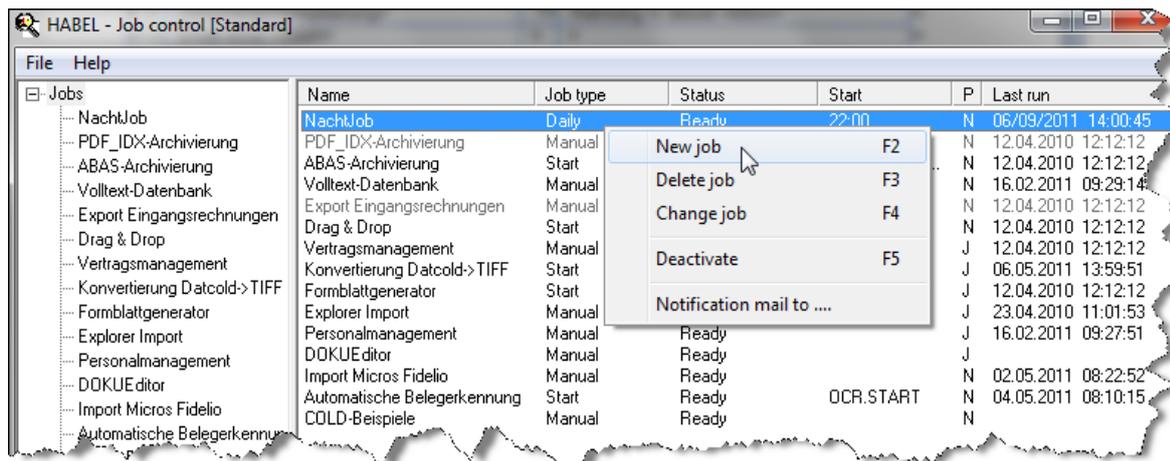
Job No. 42

02.05.2011 08:21 -> Jobstart Import Micros Fidelio
02.05.2011 08:21 .. Job wurde manuell gestartet.
02.05.2011 08:21 .. 00 111110011011111112011110110110111121211111110011010521010100
02.05.2011 08:21 .. 01 11111001010000000011B100000010001201111000000000000;75;
02.05.2011 08:21 .. 02 11111001010000000011B100000010001201111000000000000;75;
02.05.2011 08:21 .. 03 11111001010000000011B100000010001201111000000000000;75;
02.05.2011 08:21 .. 04 11111001010000000011B100000010001201111000000000000;75;
02.05.2011 08:21 .. 05 11111001010000000011B100000010001201111000000000000;75;
02.05.2011 08:21 .. 06 11111001010000000011B100000010001201111000000000000;75;
02.05.2011 08:21 .. 07 11111001010000000011B100000010001201111000000000000;75;
02.05.2011 08:21 .. 08 11111001010000000011B100000010001201111000000000000;75;
02.05.2011 08:21 -> HPHAB030.EXE /cfg=07 (Import COLD-Belege aus Fidelio)
02.05.2011 08:21 .. DB-WriteLog ist nicht aktiv.
02.05.2011 08:21 .. Konfiguration (CFG=07) wird verarbeitet.
02.05.2011 08:21 .. 0 Spools in c:\messe\habel\spools\fidelio\*.pdf gefunden.
02.05.2011 08:21 .. 3 Spools ohne Indexdatei.
02.05.2011 08:21 <- HPHAB030.EXE /cfg=07 (Import COLD-Belege aus Fidelio)
02.05.2011 08:21 -> HPHAB030.EXE /cfg=08 (Import Nachtreporte a. Fidelio)
02.05.2011 08:21 .. DB-WriteLog ist nicht aktiv.
02.05.2011 08:21 .. Konfiguration (CFG=08) wird verarbeitet.
02.05.2011 08:21 .. 135 Spools in c:\messe\habel\spools\fidelio\nachtreport\*.pdf gefunden.
02.05.2011 08:21 .. Erste Datei: TA_1_Seite_22012010_1900.pdf
02.05.2011 08:21 .. Letzte Datei: TA Zahlungen der Tage 05022010 1033.pdf
02.05.2011 08:21 .! Fehler in Datei(TA_1_Seite_22012010_1900.pdf): Feld <BelDat> nicht in DB gefun
02.05.2011 08:21 .! Fehler in Datei(TA_Au\u00e4u\u00dfenstand_22012010_1901.pdf): Feld <BelDat> nicht in DB gef
02.05.2011 08:21 .! Fehler in Datei(TA_Offene_Salden_22012010_1901.pdf): Feld <BelDat> nicht in DB
02.05.2011 08:21 .! Fehler in Datei(TA_Offene_Salden,_nur_Vorausbuchungen_22012010_1901.pdf): Feld
  
```

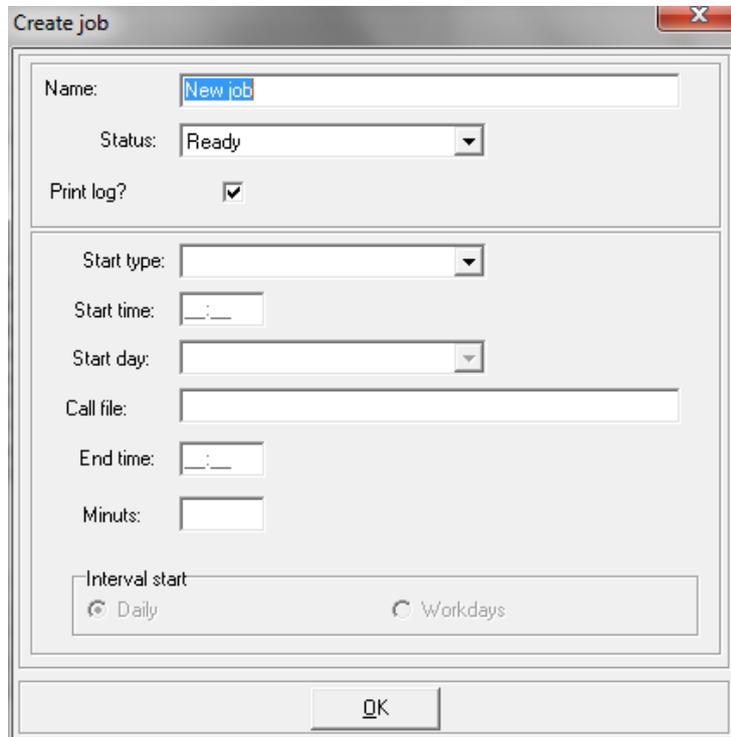
The correction of the errors is done by the administrator. If there are error messages or warnings in the Autojob that are unclear or cannot be corrected themselves, the HABEL support (support@habel.de) should be contacted.

4. Pull-down menu in the Autojob

A pull-down menu is available for the processing of the jobs.



The pull-down menu can be reached by right-hand click on the job in the right-hand window. Jobs can be created here, existing ones changed or deleted, and also (*de*)activated. *New job* and *Change job* have identical masks. Here, the key data of the job are defined:



Status

Defines whether the job is executed (ready) or not (inactive).

Print log?

This job is taken into account on the log.

Start time / Start day

Time or information about the day on which the job should start.

Call file

If the file listed here already exists in the GEDOSOD directory, this Autojob is started (if it is stored as a start type: call-up).

End time / Minutes / Interval start

Only in combination with start type "interval start" is it possible to indicate the end time or the time of the interval in minutes. It can also be defined whether the interval start is done every day or only on every worday.

Start type

Selection of the interval

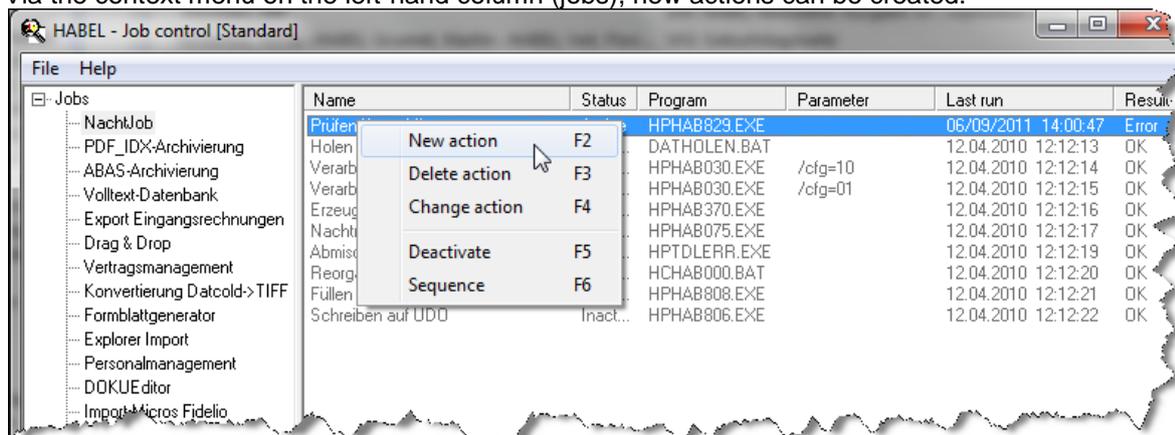
- daily
- weekly
- monthly
- on call-up*
- on every workday
- manually
- Interval**

| Start type | Meaning | Option to be set |
|------------------|---|--|
| Daily | Job is executed on a daily basis | Start time |
| Weekly | Job is executed on a weekly basis | Start day and start time |
| Monthly | Job is executed on a monthly basis | |
| Call-up | Job starts when the trigger file has been found | Which file is expected where as a trigger |
| Manually | Job does not start automatically | |
| On every workday | Job is executed on every workday | Start time |
| Interval | Job is executed at intervals of X minutes | Start time, end time and interval in minutes |

*If tasks are defined on a call-up basis, these normally start when a certain file is located in a defined directory. Example of use: spool processing during which new files are added at irregular intervals that have to be adopted immediately. If data are added, the job recognizes based on certain files that the job has to be started.

**With the interval jobs, there are several start times a day.

Via the context menu on the left-hand column (jobs), new actions can be created.



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The name of the job is reflected in the log. Consequently, a meaningful name should be selected here. The program name must always be written out in full. The program must be under .\gedosod\32-bit so that it can be executed. In addition, the programs can be called up with parameters.

The screenshot shows a 'Create task' dialog box with the following fields:

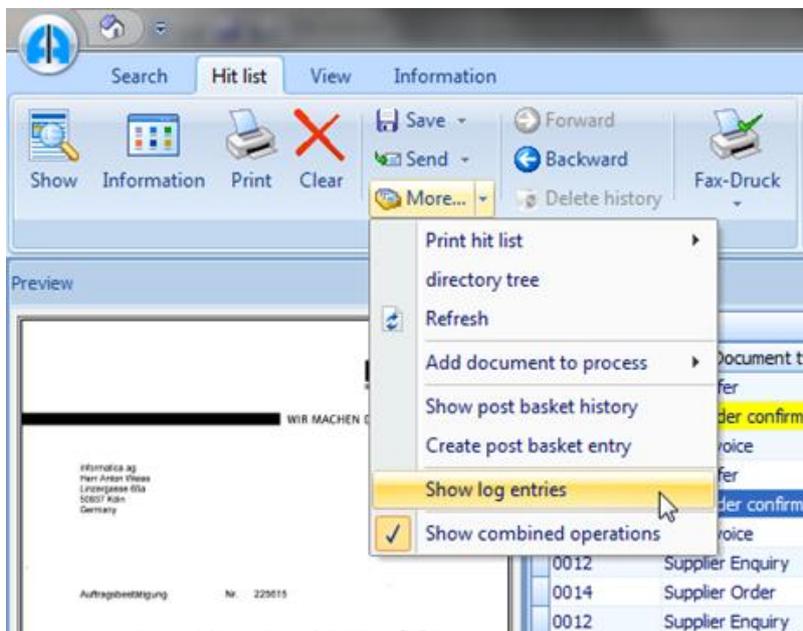
- Name: Transfer TIF + IDX
- Status: Active (dropdown menu)
- Program: HPHAB030.EXE
- Parameter: /c/g=11

An 'OK' button is located at the bottom of the dialog.

Analysis programs

1. General

In the retrieval, there is already the option of creating analyses of the respective document: What was done with the document (printed, displayed, sent by e-mail?) and by whom or when?



| Aktion | Datei nr | Sei | W | Datum / | Zeit | Benutzer |
|----------|----------|-----|---|-----------|-------|----------|
| Export | 240000! | 0 | 1 | 12/13/200 | 09:58 | |
| Export | 240000! | 0 | 1 | 12/13/200 | 09:58 | |
| Anzeigen | 240000! | 0 | 1 | 12/13/200 | 09:58 | |
| Anzeigen | 240000! | 0 | 1 | 3/9/2007 | 09:14 | |
| Anzeigen | 240000! | 0 | 1 | 3/9/2007 | 09:57 | |
| Anzeigen | 240000! | 0 | 1 | 3/9/2007 | 10:14 | |
| Anzeigen | 240000! | 0 | 1 | 5/2/2007 | 18:16 | |
| Anzeigen | 240000! | 0 | 1 | 5/3/2007 | 17:37 | |
| Anzeigen | 240000! | 0 | 1 | 5/3/2007 | 17:37 | |
| Anzeigen | 240000! | 0 | 1 | 5/3/2007 | 17:41 | |
| Anzeigen | 240000! | 0 | 1 | 6/5/2007 | 13:07 | |
| Anzeigen | 240000! | 0 | 1 | 8/30/2007 | 10:30 | |
| Anzeigen | 240000! | 0 | 1 | 10/18/200 | 08:08 | |
| Anzeigen | 240000! | 0 | 1 | 12/13/200 | 20:11 | |

Another program is available for comprehensive analyses, **HABEL STATISTICS**.

Firstly, activities can be analyzed in the document

management system: which user uses which functions how e.g. display, change, send by e-mail, etc. and/or which document was involved in an activity.

Secondly, analyses are carried out by the user himself/herself on the documents archived with regard to the database fields: Which document types were archived most frequently, which document types were never archived, for which customers have we archived the most documents, etc.

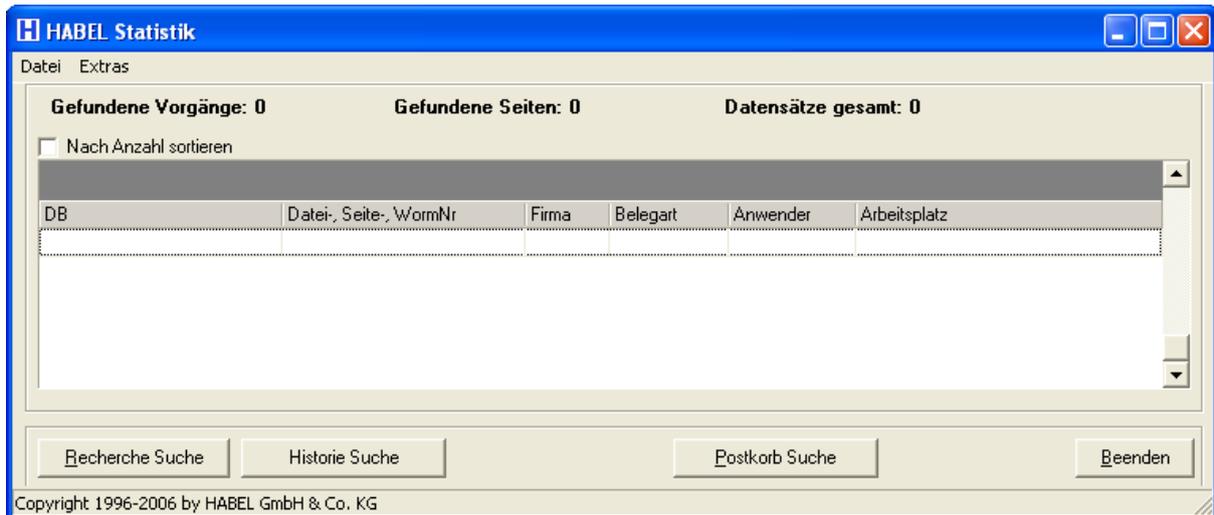
The module helps to recognize, for instance, wrong behavior in the archiving, deactivate superfluous document types, and also to create analyses on customers.

There is the option of defining and saving several recurring query patterns and also using sorting/grouping functions and export to MS Excel.

You start the analysis program via hphabstk and/or icon

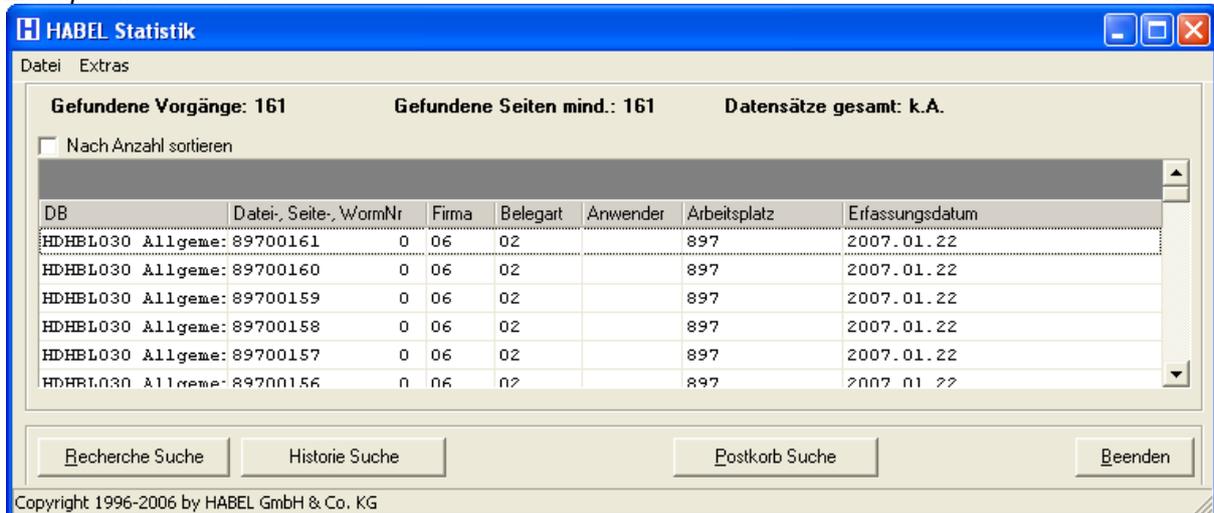


2. Program structure



When you have started the program, you will see the mask via which you are provided with the analyses.

Example with data:



3. Analyses



Via menu access, the same commands are available as there are buttons in the footer

Retrieval search → *Statistics*

Post basket search → *Analyses for post basket*

History search → *History*

When you activate the *Retrieval search* button (or menu access File – Retrieval search), another input mask for the analysis criteria is displayed. After entering the criteria (are described in more detail below), you start the analysis with the *Start search* button.

Each criterion that you want to have displayed must be activated by checking a box. If the fields are to be filled with certain terms for the analysis, you select these accordingly in the Search term selection box.

Search pattern

Suchschema:

After entering the analysis criteria, you can save them as a pattern in order to be able to call these up quickly with frequently recurring queries. For saving, you use the *Save pattern* button, the criteria currently entered are saved as a pattern for which you are asked to give a name.

Via the *Search pattern* selection box, you can access the query patterns saved and start them with the *Load pattern* button. If patterns that you no longer require are available, delete them with the *Delete pattern* button.

Determine analysis criteria

Datumssuche: bis Datumfeld:

Datenbankfeld: Suchbegriff:

Datenbankfeld: Suchbegriff:

Datenbankfeld: Suchbegriff:

Verknüpfung Suchfelder:
 Oder
 Und

Tick the fields that you would like to use for the analysis. You can access the respective fields via the selection boxes and opt for those that you require for the analysis. With "More database fields", there are other fields available. You can also decide via the link or/and whether the fields should be taken into account for the analysis in linked or non-linked form.

Define databases

Zu durchsuchende Datenbank: HDHBL030 Allgemein

Verfügbare Datenbank: HDHBL031 Personal, HDHBL032 Spedition

First select from the existing databases the databases that you want to use for the analysis (with Add/Remove).

History search

To determine which users use which functions and what happened to which document, the same mask is available when clicking the History Search button. The database fields that are available for selection vary because the search is made, for instance, according to users.

Post basket search → Analyses in the post basket

The database fields of the post basket that are used here are taken for the analysis of the post basket. An analysis can thus take place in what way the post basket is used in the company (for instance, it is determined which post basket groups are used most frequently).

In all masks, the zero positions can also be displayed, i.e. values whose result would be zero (in other words the database field and/or the document type "empty").



4. Examples of use

Possible analyses are for instance

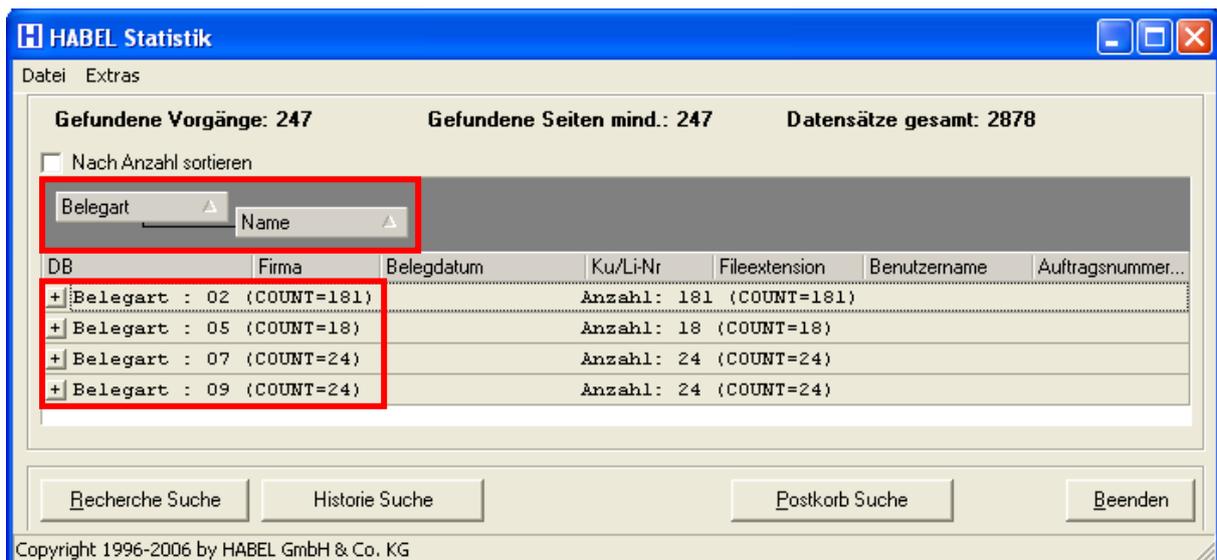
- How many documents were archived of which document type in a certain period of time, or not ("zero positions")?
- How many documents were archived on a particular date?
- How many documents were archived at a particular workstation?
- How many documents were archived by a particular user?
- Which products were sold most?
- What customer has the largest share of the archiving?
- What file formats were archived most?

5. Utilization of results



You receive an overview of the transactions, number of pages (at least), and if necessary data records (include e.g. also the items). In the overview, the database fields are displayed according to the selection of columns which the selection criteria entered apply to.

By pulling the columns into the grouping field, a transparent depiction of the result is possible. By clicking on the respective column, the sorting (ascending/descending) is done according to this criterion.



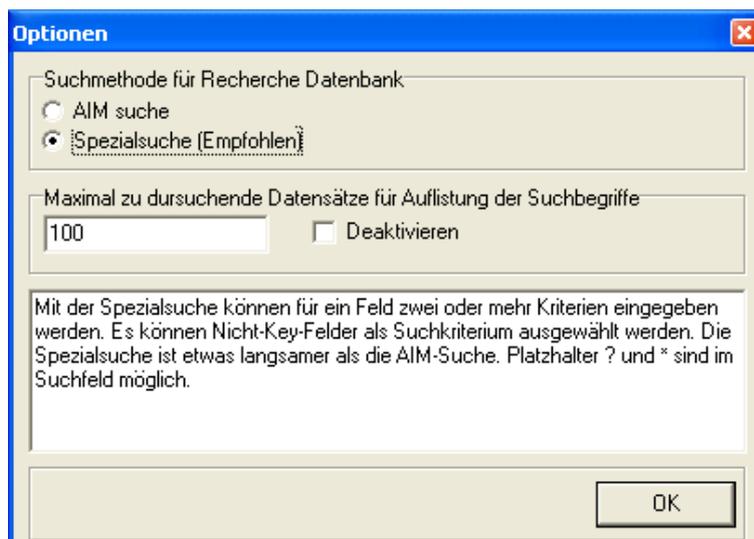
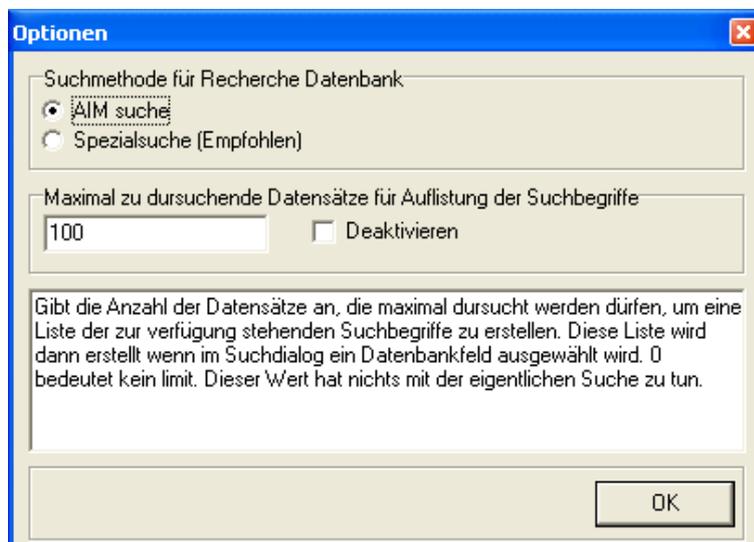
Menu access



Pop-up menu



Command options



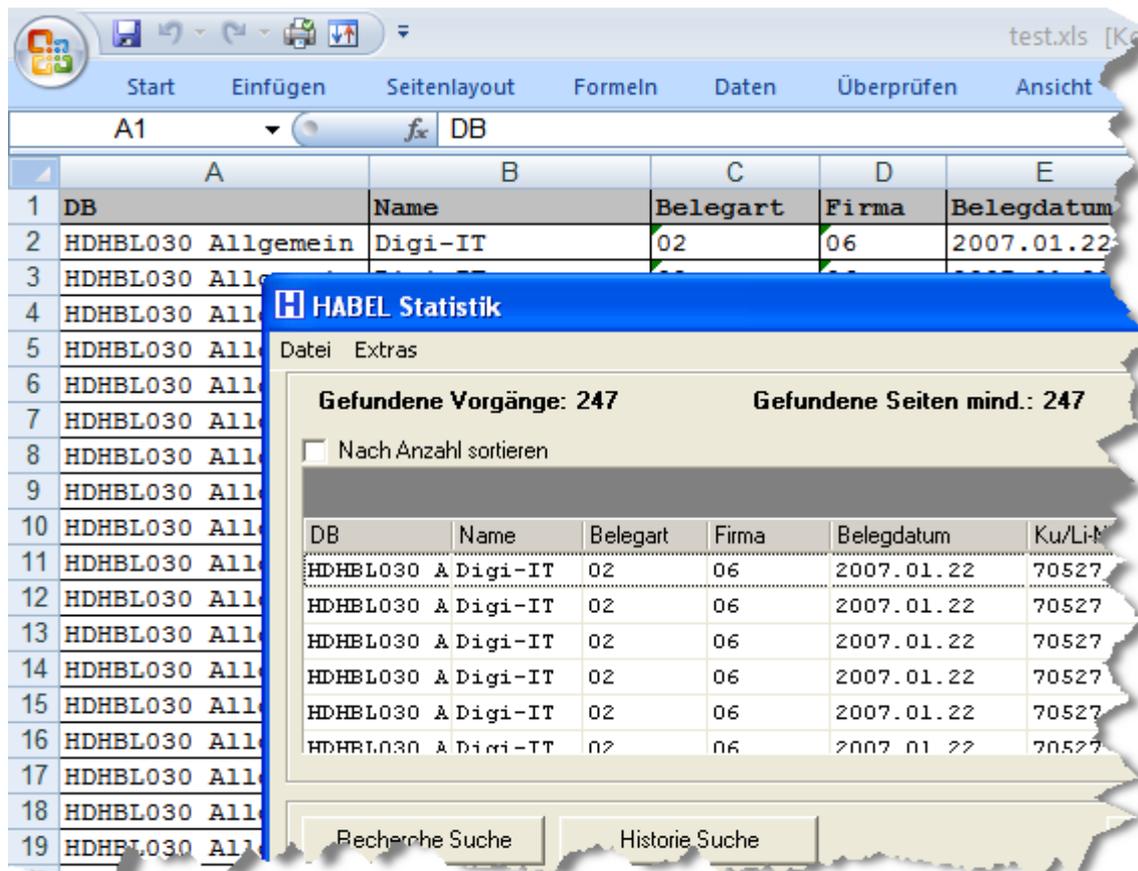
Columns command

The "Columns" command is used to add or remove columns in the display. By simply pulling the columns out of the box or into the box, the columns are displayed or hidden. There are always only the columns available that have also been defined as database fields during the analysis.

Export command

Export current view

After selecting the command, you are asked to award a place to save the file, and the name of the file. The export is done into an Excel table, which is also displayed to you immediately. Note: The current view is exported so that you also only receive the grouped presentation in Excel with grouped displays. It therefore makes more sense to export an ungrouped or at least opened table.



Document-based volume statistics

With this function, the absolute quantity found per document type is displayed.

| Belegart Nummer | Belegart Bezeichnung | Anzahl |
|-----------------|----------------------|-----------------|
| 2 | (COUNT=181) | 181 (COUNT=181) |
| 5 | (COUNT=18) | 18 (COUNT=18) |
| 7 | (COUNT=24) | 24 (COUNT=24) |
| 9 | (COUNT=24) | 24 (COUNT=24) |

| DB | Name | Firma | Belegdatum | Ku/Li |
|-----------------|-------------|-------|------------|-------------|
| + Belegart : 02 | (COUNT=181) | | | Anzahl: 181 |
| + Belegart : 05 | (COUNT=18) | | | Anzahl: 18 |
| + Belegart : 07 | (COUNT=24) | | | Anzahl: 24 |
| + Belegart : 09 | (COUNT=24) | | | Anzahl: 24 |

Enhanced

In the output, the grouping is done according to this field.

Display document command

With this function, the selected entry appears as a document display in the retrieval.

HABEL SEARCH and REPLACE

1. General

In some cases, it is necessary for a large number of database fields in the stack to be changed.

Examples:

- A corporate change means that the customer name entered has changed.
- Terms that were available in different versions previously in-house are now being standardized.
- Several supplier names were used by mistake for one supplier during archiving.

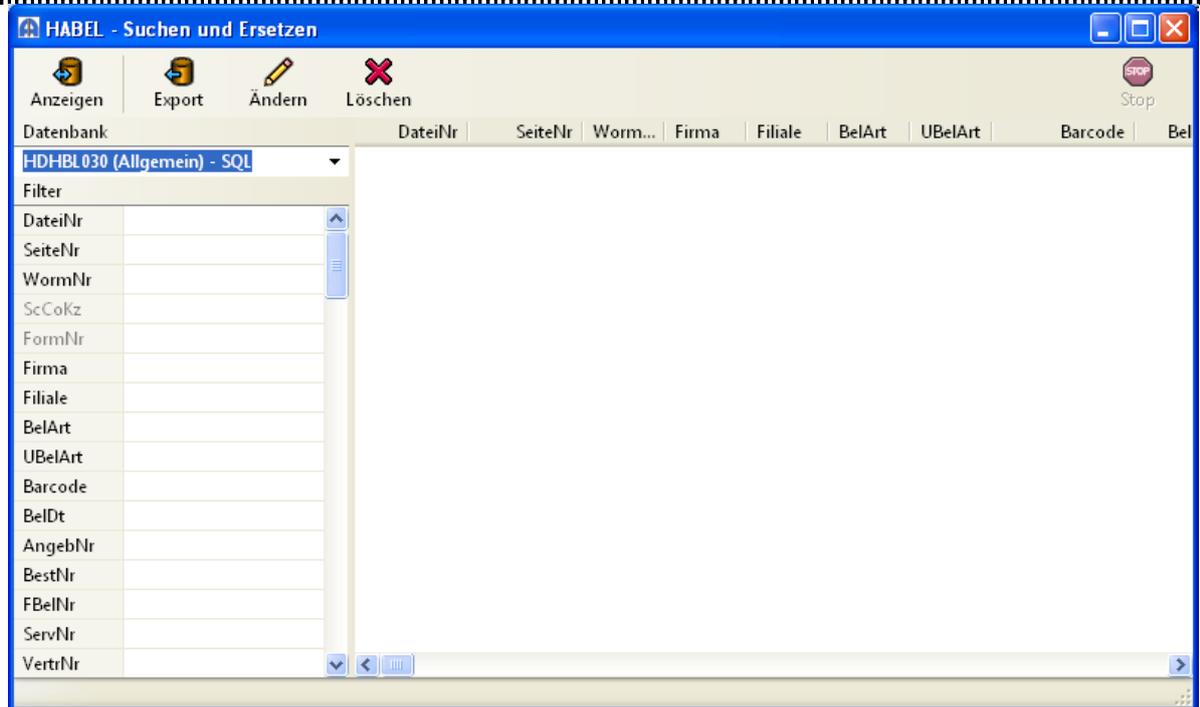
So as not to have to change each entry individually with the module **HABEL CORRECT**, there is the option of using the functions "Search" and "Replace" known from MS Office. HABEL provides the module **HABEL SEARCH and REPLACE** for this purpose.

Important: As with the awarding of rights for **HABEL CORRECT** we recommend that this module and/or the access right for it are only available to a few employees. This helps to ensure that the archiving is done in a conscientious manner as subsequent changes are not possible for all employees.

You open the program via hphab834 or icon



2. Program structure



Various commands are available via symbols in the top section

| | |
|---|--|
|  | Display of the data records that are found based on the search term entered (no display of document). |
|  | Export of the data records in a txt file (fixed field/sentence length) which are found based on the search term entered. |
|  | Carry out change – This is followed by the query which field is to be changed how. |
|  | Deletion of the data records that this filter applies to – there is a prompt for confirmation whether they should really be deleted. |

You also have a selection box to define in what database you would like to search and replace.

To get the required hits that have to be changed, use the database fields for entering the search terms in the "Filter" section. The result is displayed to you in the right-hand section.

3. Search and replace

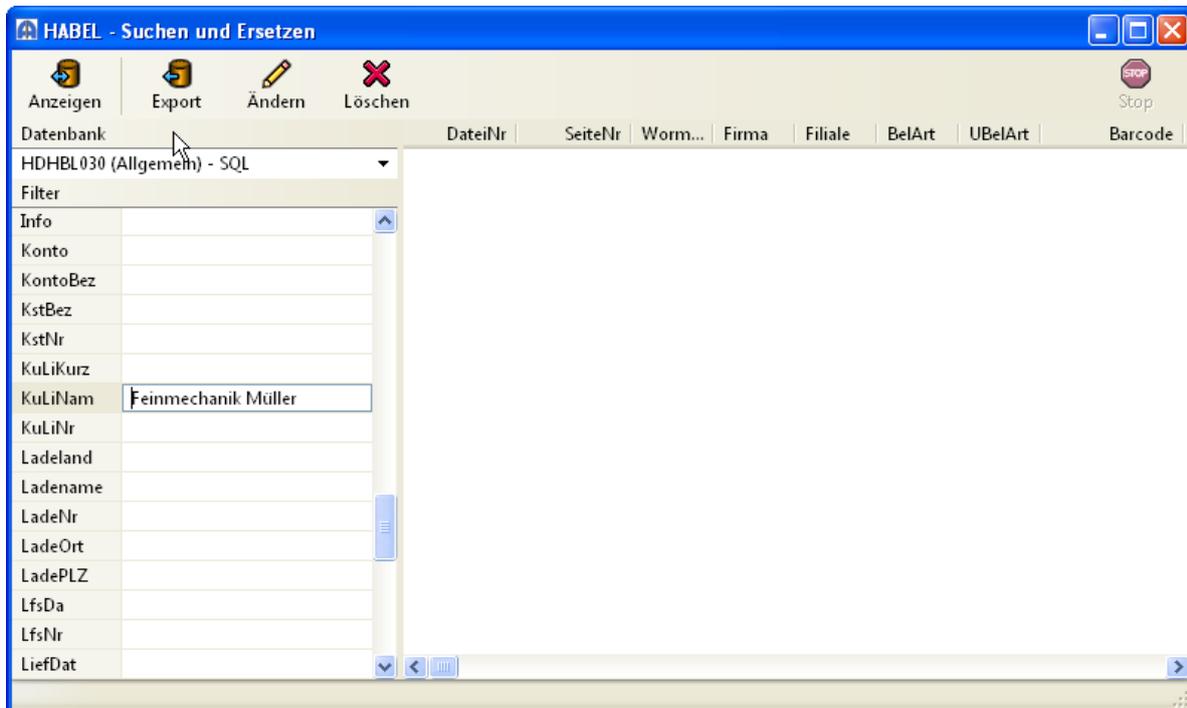
The first step is the entry of the search term in the filter to get the result that has to be changed. The filter can be sorted alphabetically via pull-down menu.



All known options which are also used in the retrieval can be used for the entry.

E.g.

- Word fragments in the SQL database are sought using the placeholder *
- ? in the date fields means that this can include any value
- ? in other input fields means that this field has to be empty, etc.

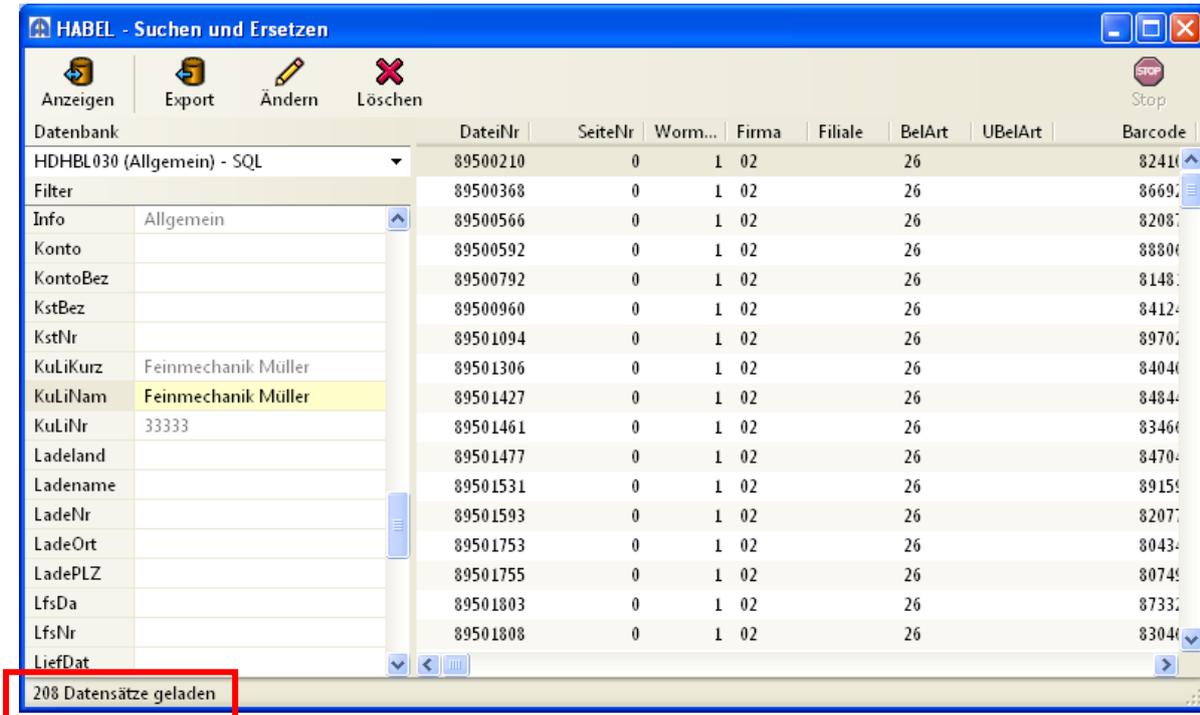


With the "Display" symbol, all the data records that match this search term are displayed to you in the right-hand field. Please ensure that it relates to the right records (cross-check: start the same search in the retrieval and check the number of hits).

You can also empty the value entered again for a new entry (pull-down menu).



Display of results (the number of hits is displayed in the status bar, here: 208 data records).



By double-clicking on the database fields, these are included in the search as further filters. In this case, the filtering is done as follows:
 KuLiNam Feinmechanik Müller
 RechNr 409090

The database fields filtered for the search are highlighted in yellow. If the "Display" icon is pressed again, the result is narrowed down to these fields (i.e. the result includes all hits for which the name is Feinmechanik Müller and the invoice number is 409090). Any number of filters can be added. By double-clicking on the database field again, this is removed from the filter.

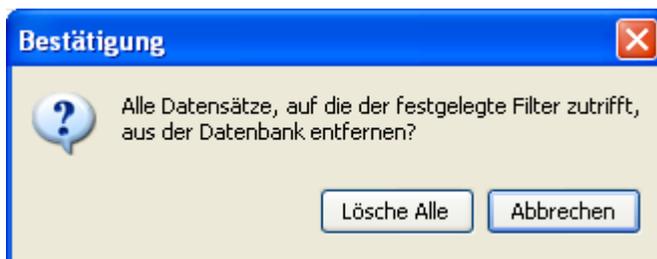
The next step is to carry out the change by pressing the "Change" symbol or to delete it by pressing the "Delete" symbol. If you make the change, select in the next input mask which field you want to fill with which new value. Under the "Flags" tab, you can reset flags for Export/Subsequent merging and Scan/Cold.



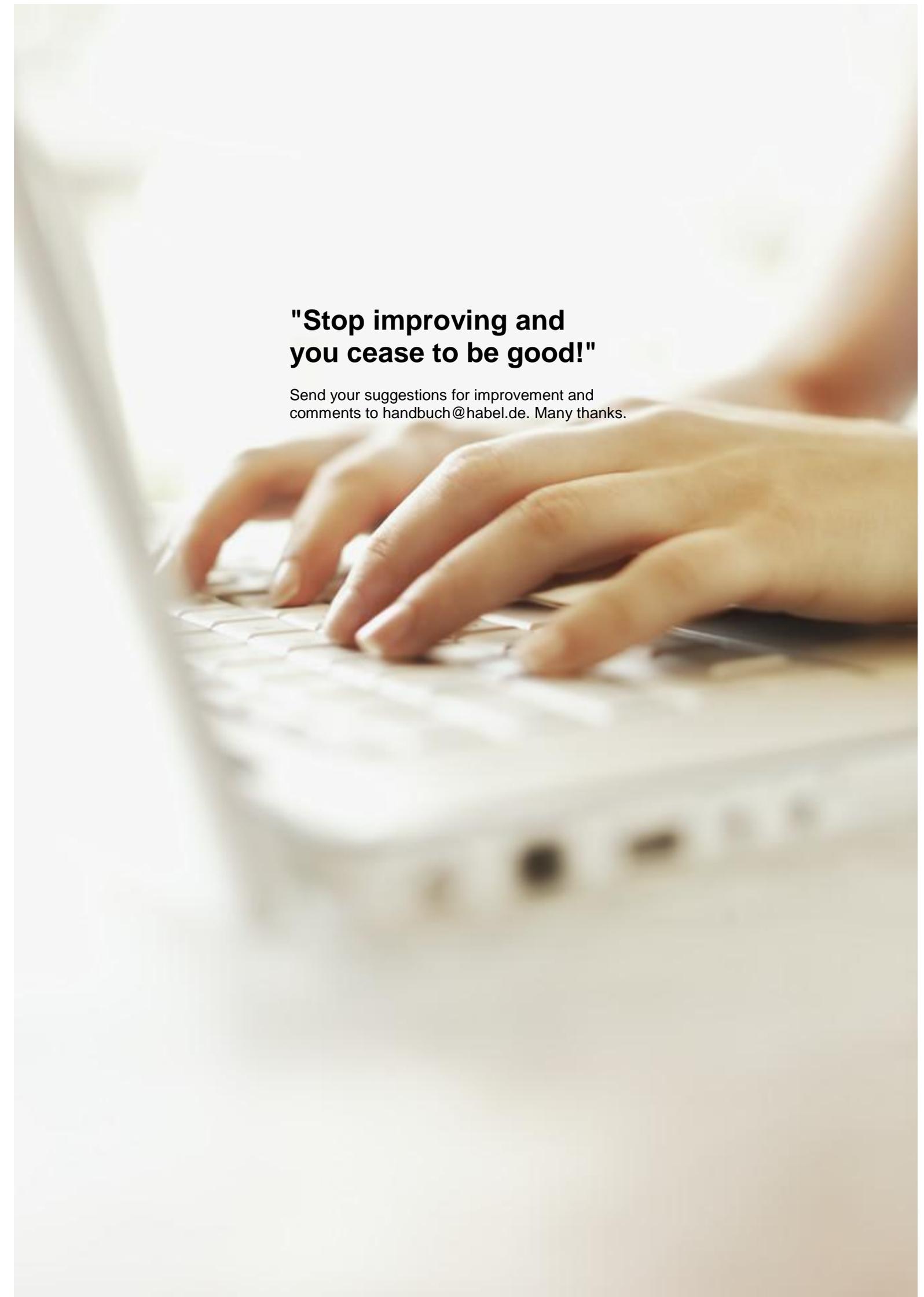
Note: With "Change values", the new value is adopted for all data records that currently match the filter!

If no entry is made in the new value, the field is emptied.

If you have selected the "Delete" symbol, this is followed by a prompt for confirmation whether you really want to delete it.



If so, the filtered data records are removed in full from the database. **Note:** Not only the field is "deleted" (emptied).



**"Stop improving and
you cease to be good!"**

Send your suggestions for improvement and
comments to handbuch@habel.de. Many thanks.