

# 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
HABEL MEMO plus	Indication that the function described here constitutes an additional module that may possibly not be included in the scope of the system.
<b>F</b> B	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<sup>®</sup> document management program, as functions may be included that have not been purchased and/or activated for your system. Generally, it is easy to add to your system. Please contact your consultant for details.

#### Note:

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HABEL administration

# **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.



IV. Administration HABEL administration

## 1. Basic parameters

Base parameters				
eposition structure			SQL configuration	
New: Deposit receipts in a	sub-directory structure		Servertype	MySQL
<ul> <li>Inside the directory "Belege</li> </ul>			Server	127.0.0.1
Uld: Deposit receipts in the without a sub-directory stru	: "Belege"-directory cture		Port	3306
			Database	messe
Company	2 signs	-	User name	root
Sut	Without		Password	
Receipt type	4 signs		Display password encrypted	🔘 Yes 💿 No
Sub-receipt type	4 signs		Compress	
can with booking year			Character-set	
ABEL-Autologin	$\checkmark$		MySQL Post-basket	$\checkmark$
Jsercount	20		Ability to start server existent	
COLD-support	$\checkmark$		Protocol	
uto-logoff after	1 Minute	-		
Number of months Belsic	12		Address and serial number	HAREL GrobH & Co. KG
Container	<b>V</b>		Street	Untere Hauptstraße 1.5
Access control				Bietheim-Weilheim
ivoli Storage Manager			tru	
Vew license measuring			Imber	24972-881-131918
Version 2 Password				

 $\triangle$ 

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.

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ompanie	3		
No.	Caption		
01	HABEL GmbH & Co. KG		
02	HABEL Dokumentenmanagement GmbH		
03	HABEL Beteiligungsgesellschaft mbH		
05	Ungarn Volitext		
07	HABEL GoobH & Co. KG NI		
09	HABEL Espania - No estructurado de la em		
99	Dummy Belegleser Firma		
Number			
Caption	ompany Delete Company		

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.



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## 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

sers	Groups Document groups	Client Installation					
ID .	Account	Name	First name	La	Data Groups		
001	mabele	Abele	Martin				
002	fauer	Auer	Franz		Usernummer	001	New
003	sbanzhaf	Banzhaf	Sandra		Usersystemname	mabele	
004	kbutschle	Butschle	Klaus		Deservent	******	Change
005	doskar	Dilger	Oskar		Passwort		
006	heisenmann	Eisenmann	Heike		Nachname	Abele	Password
007	pemig	Emig	Paula		Vorname	Martin	
800	hfriedrich	Friedrich	Helmut		Telefon-Nr		Delete
009	afrisen	Frisen	Andreas		East No.		
010	agabel	Gabel	Alexander		FdX-IN		Save
011	kgerth	Gerth	Kurt		E-Mail Adresse		
012	mhause	Hause	Manfred		Standort		Cancel
013	sherzog	Herzog	Sylvia		Benutzer aktiv	1	
014	mheinen	Heinen	Maxi		Dendaer die		- 3
015	rkehrer	Kehrer	Renate		Postkorb aktiv	1	-
016	jkoch	Koch	Jakob		Sprache		
017	klangert	Langert	Karl		Benutzerkürzel	mah	
018	wmartin	Martin	Werner		Carablasht	1	
019	imerk	Merk	Irene		Geschiedrit	1	
020	gmessner	Messner	Gerhard				
021	uschmidt	Schmidt	Udo		(2)		
100	nachtjob	Nachtjob					
123	mike.schmitt	Schmitt	Mike				
950	Habel	Habel	Systembenutzer	EN			
1							

In the left-hand area, all the created users are displayed (1), the data for these are visible in the righthand 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).



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#### Menu bar – Symbols

🔄 User administration	Via the File menu, different functions can be reached:		
File Edit About	Drint		
Print Import from Active Directory	Overview of all users stored in this administration indicating all information entered under the "Data" section.		
Close	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):

🔄 User administration					
File	Edit	About			
Users		New			
ID		Change			
001		Delete			
002		Save			
004		Cancel			
005	005 Cancel				
006		Password			
007	_	Demid			

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.



IV. Administration HABEL administration

#### **User administration**

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

Data Groups		Please assign
UsernummerUsersystemnamePasswortNachnameVornameTelefon-NrFax-NrE-Mail AdresseStandortBenutzer aktiv1Postkorb aktivSpracheBenutzerkürzelGeschlecht	<u>New</u> <u>Change</u> <u>Password</u> <u>Delete</u> <u>Save</u> <u>Cancel</u>	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 <i>E-mail address</i> If an e-mail address is entered, this user can also be defined as the recipient of the Autojob log
	Olose	

#### 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.

111	012	IIICIN	PICIN	TICHE		
	020	gmessner	Messner	Gerhard		
	021	uschmidt	Schmidt	Udo		
Ш	100	nachtjob	Nachtjob			
	123	mike.schmitt	Schmitt	Mike		
	950	Habel	Habel	Systembenutzer	EN	
I٢	Inaktiv	ve Benutzer ausblenden				Close
IL	AL.					
1	Copyright © 1996-2011 by HABEL GmbH & Co. KG, 78604 Rietheim-Weilheim User: Habel					



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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 <u>HABEL AUTO LOG-OFF</u> 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	

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!



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

Data	Groups	
Membe	r of:	Add
No.	Description	Save
310	ENTWICKLUNG	Bave
		Delete

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

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



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#### **User administration**

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

o.	Description	Post b	Users					
00	SOFTWARE	Ja	Assigi	hed		Not as	signed	New
10	ENTWICKLUNG	Ja	No.	User name		No.	User name	<u>New</u>
20	PERSONAL	Ja	002	fauer		001	mahele	Change
30	GF	Ja	007	nemia		003	shanzhaf	Change
10	VERTRIEB	Ja	012	mhause		004	kbutschle	
50	FIBU	Ja	013	sherzog		005	doskar	
99	Systembetreuer	Ja	017	klangert	1	006	heisenmann	Delete
						008	hfriedrich	
					<	009	afrisen	Save
						010	agabel	
					>	011	kgerth	Cancel
						014	mheinen	
						015	rkehrer	
						016	jkoch	
						018	wmartin	
						019	imerk	
						020	gmessner	
						021	uschmidt	
						100	nachtjob	
						123	mike.schmitt	
						124	fheim	
						950	Habel	
up nu	imber: Group	o description:						
0	SOF	TWARE						

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.





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#### **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.

ன User adm File Edit	inistration About				
Users Grou	ps Document groups Client Installation	Retrieval	document groups		
No. 300 310 320 330 340 350 999	Description SOFTWARE ENTWICKLUNG PERSONAL GF VERTRIEB FIBU Systembetreuer	No.	Description		Save
		Ad	d Delete		Close
Copyright ©	1996-2011 by HABEL GmbH & Co. KG, 7	78604 Rietheim	Weilheim	Jser: Habel	

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*.



#### IV. Administration HABEL administration

rs   Grou	ups Doci	ument groups	Client Installation									
ProfID 7553	PC-No	PC-No for	User name HABEL Wike Schmitt HABEL \fheim	Computer DE-CLI-38	Office I 0	Outlo 0	Schn	Tobit 0	Retri I I	Post . I I	Links         HABEL-OFFICEINTEGRATION         HABEL-TOBIT-ADDIN         HABEL-TOST BASKET         HABEL-POST BASKET         HABEL-TOST BASKET         HABEL-ATCOLD         HABEL-ERROR LOGS         Aministrative tools         Context menu         HABEL Outlook 2010 Integration         HABEL Schnellstart	<u>C</u> hange <u>D</u> elete <u>S</u> ave <u>C</u> ancel
•			111							•	Set default values         Edit user         PC-No.:         PC-No for archive printer:	<u>C</u> lose

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

	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.



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ProfiD       PC-No       PC-No       PC-No       PC-No       PC-No       PC-No       PC-No       Links         Image: transmission of transmissing transmission of transmission of transmissi	Jsera <u>E</u> di ers (C	lient Installation	
HABEL Wike Schmitt     I     I     I       c7553     DE-CLI-38     0     0     0     I       HABEL TOBIT-ADDIN       HABEL \fheim     HABEL-FTOBIT-ADDIN       HABEL \fheim     HABEL-TOBIT-ADDIN       HABEL \fheim     HABEL-TOBIT-ADDIN       HABEL TOBIT-ADDIN     HABEL-TOBIT-ADDIN       HABEL \fheim     HABEL-TOBIT-ADDIN       HABEL-TOBIT-ADDIN     HABEL-TOBIT-ADDIN       HABEL-TOBIT-ADDIN     HABEL-TOBIT-ADDIN	rofID	iser name Computer Office Outlo Schn Tobit Retri Post Links	
c7553 DE-CLI-38 0 0 0 I I HABEL-TOBIT-ADDIN HABEL\fheim HABEL\fheim HABEL_COBIT-ADDIN HABEL-POST BASKET HABEL-DATCOLD HABEL-PROR LOGS HABEL-OBIT-ADDIN		IABEL Wike Schmitt I I I I	TEGRATION
Aministrative tools	7553	DE-CLI-38 0 0 0 I I HABEL-TOBIT-AD	DDIN AL Change
		Aministrative too	Delete
✓ Context menu HABEL Outlook 2010 Integra HABEL Schnellstart		Context menu HABEL Schnelst HABEL Schnelst	010 Integration

In our example, the "Office" and "Retrieval" links are uninstalled (U) during the next start and the post basket reinstalled (I) for the user HABEL\Mike 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.

rs Gro	oups   Do	cument groups	Client Installation									
rofID	PC-No	PC-No for	User name HABEL\Mike Schmitt	Computer DE-CLI-38	Office I 0	Outlo 0	Schn	Tobit 0	Retri I I	Post . I I	Links HABEL-OFFICEINTEGRATION HABEL-TOBIT-ADDIN	
			HABEL \fheim								HABEL-RETRIEVAL HABEL-POST BASKET HABEL-DATCOLD HABEL-ERROR LOGS Aministrative tools	<u>C</u> hange
											Context menu HABEL Outlook 2010 Integration HABEL Schnellstart	<u>S</u> ave
											Save default values	
											PC-No.:	
											PC-No for archive printer:	Close

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.



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Receipt-type Editor			
Io. Caption	•	Receipt groups:	
VK Anfrage           002         VK Angebot           003         VK Kalkulation           004         VK Bestellung           005         VK Auftragsbestätigung           006         VK Fertigungsauftrag           007         VK Lieferschein           008         VK Speditionsauftrag           009         VK Speditionsauftrag           009         VK Rechnung           010         VK Gutschnift           011         VK Pflichtenheft           012         EK Anfrage           013         EK Angebot           014         EK Bestellung           015         EK Auftragsbestätigung           016         EK Vitragsbestätigung		ØD1       Unknown Allgemein       2         B02       Unknown Spedition       803         B03       Unknown Spedition       806         B04       Unknown Vetragsmanagement       806         B05       Unknown Vetragsmanagement       806         B07       Unknown Hotel       9         G01       Habel DIG Allgemein       602         G02       Habel DIG Spedition       603         G04       Habel DIG Spedition       606         G05       Habel DIG Adata       607         G07       Habel DIG Hotel       9         P01       Archive-printer Allgemein       902         P02       Archive-printer Personalmanagement       902	E All None
016 E.K. Lietermannung 017 E.K.Lieterschein 018 E.K.Rücklieterschein 020 E.K.Ructschrift 026 Produktinformation 027 Doku-Editor 027 Wartungsverträge 023 W.K.rucespondenz		P03 - Archive-printer Spedition Companies:     O1 - HABEL GmbH & Co. KG     O2 - HABEL Dokumentenmanagement GmbH     O3 - HABEL Beteiligungsgesellschaft mbH     O6 - Ungam Volltext     O7 - DocuGraup K ft	
Alter Storespondenz     Service-Bericht     Service-Bericht     Service-Bericht     Service-Bericht     VK Mahnung     VK Masselead     Veträge     Veträge     Veträge     Veträge     Veträge     Veträge     Veträge     Seconservice     Seconservice     Zeichnung     So     VK Besuchsbericht		Sub-receipt types:	Change Remove Delete
063 EK Preisliste 066 Fibu Rechnung	-	0001 VK Anfrage	

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).





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0034	EK Korrespondenz		Sub-receipt types:		
0035	Service-Bericht				Marri
0036	VK Mahnung				New
0037	Mahnung Lieferant				Change
0038	VK Messelead				onango
0039	Verträge				Remove
0044	Protokolle				
0050	Wettbewerbsunterlagen				Delete
0051	Presseberichte				
0053	Zeichnung		Fuiltext receipt type	,	
0056	VK Besuchsbericht	-	Number:	Description:	
0063	EK Preisliste				
0066	Fibu Rechnung	-			
Co	py receipt type		New	Delete Save Reset E:	xit

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.

0181 Tagesabschluß	
0182 Apfrage	Sub-receipt types:
0102 Annage 0192 Angebot	News
0103 Angebot	
0195 Mohnung Dobitor	Changes
0100 Mannung Debitor 0100 Tagungaraum (Mista)	
0100 Tagungstaum (miete) 0197 Tagung E t P	Remove
	Delete
0100 F&D Arillage	
0100 F&D Destallung	Fulltext receipt type
0101 F&D destellung	
0100 EVD Listerschein	Number: Description:
0102 F&D Deeleware/Cuterbailt	0184 Vertrag
	·
[	
Copu receipt tupe	New Delete Save Reset Exit
Create/Add sub-receipt type	
V(101 Geodlech V(ottag	
V102 - BeteiligVertrag	
V103 - GeschäftsfVertrag	At this point, new sub-document types can be created by entering the
V105 - Vollmachten	number and description or existing sub-document types assigned
V106 - Miet-/Pachty.Grund V107 - Miet-/Pachty Immob	through a lasting from the list
V108 - Consulting Vertrag	
V109 - Kaufvertrag KFZ V110 - Leasingvertrag KFZ	
Vitit Beberender	Assigned sub-document types can be edited further via the Change /
Number:	Provide the second
Description:	
a compton.	Remove (deleted allocation to this document type) / Delete (delete
	sub-document type entirely from the selection) buttons.

OK



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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		Sub-receipt types					
0182	Anrrage							Nou
0183	Angebot							INEW
0184	Vertrag							Change
0185	Mahnung Debitor							Contango
0186	Tagungsraum (Miete)							Remove
0187	Tagung F & B							
0188	F&B Anfrage							Delete
0189	F&B Angebot							
0190	F&B Bestellung		Fulltext receip	ot type				
0191	F&B Auftragsbestätigung		Number:		Description:			
0192	F&B Lieferschein		0104		Vedee			
0193	F&B Rechnung/Gutschrift 🛛 🚽		0184		vertrag			
Co	py receipt type	[	New			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



**IV. Administration** HABEL administration

 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 <u>HABEL USER</u> MANAGER is used.

Sentence - Werwaltung - Benutzerrechte			
System     System	Rechercherechte     Scan-Re	chte Archivdruckerrechte	
<ul> <li>W Unternehmen</li> <li>Firmen / Filialen</li> <li>Belegarten</li> <li>Beleggruppen / Datenbanken</li> <li>Rechteverwaltung</li> <li>Benutzerranager (Rechte)</li> <li>Benutzerrechte</li> <li>Support</li> </ul>	Benutzer           101         Abele, Mattin *           002         Auer, Franz *           003         Banzhaf, Sandta *           004         Butschle, Klaus *           005         Diger, Oskar *           006         Eisenmann, Heike *           007         Emig, Paula *           008         Friedrich, Helmut *           009         Frisen, Andreas *           010         Gabel, Alexander *           011         Geth, Kurt *           012         Hause, Manfred *           013         Herzog, Sylvia *           014         Heinen, Maxi *           015         Kehrer, Renate *           016         Koch, Jakob *           017         Langert, Karl *           018         Matin, Werner *           020         Messner, Gethard *           021         Schmidt, Udo *           021         Schmidt, Mike *	Belegarten     Alle     Keine       V     0001 - VK. Anfrage     Image: Comparison of the second of the secon	
	* = Vollzugriff		
		Speichern Zurücksetzen Bee	enden



IV. Administration Client installation

## **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 - Arbeitsplatzinstallation	
HAB	
Profilaktualisierung	Installieren
Archivdruckertreiber	Installieren
Outlookschnittstelle	Installieren

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

- Profile update
- Archive printer driver
- Outlook interface



IV. Administration **Client installation** 

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.

Inform	ation 🛛
į)	Die Verknüpfung zur Profilaktualisierung wurde erfolgreich ins systemweite Autostartmenü eingetragen.
	ОК

"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.

🔄 User administr	ation					27		
File Edit Abou	ut							
Users Groups	Document gr	roups Client Installation						
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  $\rightarrow$  Programs  $\rightarrow$ Autostart.



IV. Administration **Client installation** 

#### 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 (Globally Unique Identifier) 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\rasch	0	1	0	0	0	0
8e7b989648ae4f39bec5a6248a406116	4		SYSTEM3\bluft	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.

HABEL DATCOLD 🖬 HABEL











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.



IV. Administration **Client installation** 

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.

Informa	ation 🛛 🛛 🔀
(į)	Der Archivdruckertreiber wurde erfolgreich eingerichtet.
	ОК

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

<ul> <li>Hochformat</li> <li>Querformat</li> </ul>	
Beidseitiger Druck	
CLange Seite	
V Kurze Seite	

Layout Papier/Qualität				
Schwarzweit	в	🚫 Farbe		
			Erweitert	

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.





IV. Administration Client installation

#### 5. Uninstalling the HABEL workstation installation

. A

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  $\rightarrow$  Delete Edit menu  $\rightarrow$  Delete Delete button Or press the "DEL" key

Then go to Control Panel  $\rightarrow$  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  $\rightarrow$  software. Select the entry "HABEL Outlook Add-In" and uninstall it.

#### Office integration

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



IV. Administration HABEL USER MANAGER

# 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 hdhab881. If you have the HABEL administration in use, you can access the program directly from there.

#### Usermanager



In general:

- 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.



IV. Administration HABEL USER MANAGER



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.....

IV. Administration HABEL USER MANAGER

# 2. Program structure

🛃 User rights manager [Recherche]	
File Edit Access Info	-
Program: HPHAB200 List	User Groups
	U / LoginName Name
Name Descri Value Allowed Vali Vali With	▶ 001 mabele Abele,Martin =
····· 👷 User mabele UU1	002 fauer Auer,Franz
	003 sbanzhaf Banzhaf,Sandra
	004 kbutschle Butschle,Klaus
	000 doskar Dilger, Uskar
	007 pemia Emia Paula
	008 hfriedrich Friedrich Helmut
	009 afrisen Frisen,Andreas
	Copy rights to user Copy rights to group Rights Document group Company Document type Subdocurr
	Change all Change all Change all non-indexed fields
	<< <u>C</u> opy (F9)
Copyright © 1996-2011 by HABEL GmbH & Co. KG, 78604 Rietheim-Weilheim	06.07.2011 09:36

0	Selection of the program for which you are assigning rights to the respective user/group
0	Display of the selected user and the assigned rights (tree structure)
₿	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.



IV. Administration HABEL USER MANAGER

# 3. Menu bar – Symbols

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

ĺ	🛃 User rights manager [Recherche]	Print (symbol bar ) Overview of the rights of the selected user is printed out
	File Edit Access Info	
	Print 🔐 =	Print preview Preview of the print
	Print preview	Close (symbol bar 💷 )
	Close	Quits the program

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

🛃 User rig	hts manager [Recherche]	
File Edit	Access Info	
	Copy rights to user	Strg+B
Prog	Copy rights to group	Strg+G

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



IV. Administration HABEL USER MANAGER

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

🛃 User rights m	anager [Recherche]	
File Edit Acc	ess Info	
	Delete	Entf
	Permit/forbid	F6
Program:	Save	Strg+S
	View all	
Name	Check rights	Strg+R
Ba Ar	Inside/outside date range	F7
-Ra Ar	Edit date range	

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.



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 🚩 X )

If a right is assigned and is marked as forbidden (symbol  $\Join$ ), 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.



IV. Administration HABEL USER MANAGER

# Complete display (symbol bar h )

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.

Access right		_	-			
lame 🗸	Description	Value	Allowed	Valid from	Valid to	Within date range
)– 👷 User	mabele	001				
	Recht (Gruppen 310)		~			+
	Recht (Benutzer 001)		×			-
- 🔒 Start workflow	Recht (Benutzer 001)		~			+
Show protocol	Recht (Benutzer 001)		~			+
Show post basket history	Recht (Gruppen 310)		×			+
Show post basket history	Recht (Benutzer 001)		~			+
	Recht (Benutzer 001)		×			-
	Recht (Gruppen 310)		~			+
	Recht (Benutzer 001)		×			+
Print hit list preview	Recht (Gruppen 310)		~			+
Print hit list preview	Recht (Benutzer 001)		×			+
	Recht (Gruppen 310)		~			+
	Recht (Benutzer 001)		~			+
	Recht (Gruppen 310)		×			+
Print	Recht (Benutzer 001)		~			+
	Recht (Gruppen 310)		~			+
- 🔒 Page layout	Recht (Benutzer 001)		~			+
	Recht (Gruppen 310)		~			+
	Recht (Benutzer 001)		×			-
	Recht (Gruppen 310)		~			+
	Recht (Benutzer 001)		~			+
	Recht (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.



IV. Administration HABEL USER MANAGER

# Check rights (CTRL+R) (Symbol 토)

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.

Check rights							х
Description		] [					
			User:	001 (B) mabe	ele Abele		•
						V	
			Document group				-
- Annotations			Document group				_
Change			C		C		
Change all	=		Company:	UI HABELI	umpH & Lo	i. Na	<u> </u>
Change all non-indexed fields	-		Subsidiary:				-
Change fonts and colors			_	[			51
- Change input mask of user			Document typ	10001 VK Anfi	rage	9	•
Create ERR-entries			Subdocument			4	-
- Create post basket entry							_
Delete							
Delete position		j,					_
- Display version info of annotations			DateiNr:				<b>A</b>
Edit item			SeiteNr:				
⊕ Execute external programs			WormNr:				
Execute program			ScCoKz:				
- Export			FormNr:				
- Find			Barcode:				
- Information			BelDt				-
Mail	Ŧ		Г.ю				
		• •					
Right				A	locess		_ ^
Adapt input mask							
Add document to process							
Add/remove input mask fields							
Annotations/Marker/Change					✓		
Annotations/Marker/Delete					✓		
Annotations/Marker/New					✓		
Anny Marker/View					<ul><li>✓</li></ul>		
Ann Note/Chan 4					<b>~</b>		*
Check Check all rights						Quit	t
		-			The second		

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

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).



IV. Administration HABEL USER MANAGER

#### 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 Program: HPHAB200 List, 🛺 Program list Progra... 🛆 Description hphab200 Recherche hphab601 Verwaltung Firmen hphab602 Verwaltung Belegarten/Unterbelegarten hphab603 Verwaltung Benutzer hphab655 Postkorb hphab755 Fehlerlisten hphab805 Autojob hphab840 Worm-Eigenschaften verwalten ΟK Cance

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

Γ	lser	Groups			
		12/5/3	12221222	12/2/2/2/2/	-
	U∧	LoginName	Name		
Þ	001	mabele	Abele,Martin		Ξ
	002	fauer	Auer,Franz		
	003	sbanzhaf	Banzhaf,Sandra		-
	004	kbutschle	Butschle,Klaus		
	005	doskar	Dilger,Oskar		
	006	heisenmann	Eisenmann,Heike		
	007	pemig	Emig,Paula		
	008	hfriedrich	Friedrich,Helmut		
	009	afrisen	Frisen,Andreas		Ŧ
		Copy rights t	o <u>u</u> ser	Copy rights to group	



IV. Administration HABEL USER MANAGER

#### 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				
			×			-
	Recht		✓			+
	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.

<u>Note</u>: 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.

Na	me	Description	Value	Allowed		Valid from	Valid to	Within date ra
<b>_</b>	🚯 User	mabele	001					
	🏹 Annotations/Note/New	Recht			<b>~</b>			4



IV. Administration HABEL USER MANAGER

#### 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.

User rights manager [Recherche]		
File Edit Access Info		
🎘 💫 🖶 🧏 🗶 🗔   🄮 🗕   🕼 /		
Program: HPHAB200 List	User Groups	
		·
New Devid With Allowed Mick Web 1976	Us 🛆 LoginName Name	
Name Descri Value Allowed Vall Vall Wit	O01 mabele Abele,Martin	
Annotatio Recht	002 rauer Auer, Franz	
Find Recht 🗸 🕂	003 sbanznai banznai, sanura 004 khutschle Butschle Klaus	
	005 doskar Dilger,0skar	
	006 heisenmann Eisenmann,Heike	
	007 pemig Emig,Paula	
	008 hfriedrich Friedrich,Helmut	
	UU9 arrisen Frisen,Andreas	· •
	Copy rights to user	Copy rights to group
	Bights Document group Company Document type Subdocum	nent tune DB fields Edit fields Left
	> 01 Allgemein	
	Contraction Contractico Contra	
	03 Spedition	
	04 Tribiquity	
	05 Vertragsmanagement	
	07 Hotel	
	08 DIV	
	<< <u>С</u> ору (F9)	
Copyright @ 1996-2011 by HABEL GmbH & Co. KG, 78604 Rietheim-Weilheim		06/07/2011 14:55 🔐

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.

Name		Description	V., A., Vali	Vali Wit
🖃 🕵 U	ser	mabele	001	
	Annotations/Note/New	Recht	×	+
📄 🖻 🔒	Find	Recht	×	÷.
	🚱 BelGrp	Allgemein	01 🖌	+



IV. Administration HABEL USER MANAGER

#### 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.

User rights manager [Recherche]	-	and the second	Briggs age of prost and the			- 0 <b>X</b>
File Edit Access Info						
🏷 🗙 🖬 🛰 🗩 🗐 🏠 🗕 🗍						
Program: HPHAB200 List	User	Groups				
	Us	A LoginName	Name			•
Name Description V. A. Vali. Vali. Wit.	▶ 001	mabele	Abele,Martin			=
E 🕵 User mabele 001	002	fauer	Auer,Franz			
Mannotations/Note/New Recht 🖌 🔶	003	sbanzhaf	Banzhaf,Sandra			
Eng Find Recht V P	004	kbutschle	Butschle,Klaus			
	005	doskar	Dilger,Oskar			
	006	heisenmann	Eisenmann,Heike			
	007	pemig	Emig,Paula			
	800	hfriedrich	Friedrich, Helmut			
	009	arrisen	Frisen,Andreas			*
		Сору	rights to <u>u</u> ser		Copy rights to group	
	Rights	Document group	Company Document type	Subdocument type	DB fields Edit fields	Left
	19520	AL 2010 AL 2010			0.000.000.000.00	
	si Fi	rma 🛆	Text			
	- B	elGrp : 01				
		1	HABEL GmbH & Co. KG			=
	0.	2	HABEL Dokumentenmanagement	GmbH		
	03	3	HABEL Beteiligungsgesellschaft m	ьн		
	06	6	Ungarn Volltext			
	07	7	DocuGroup Kft.			
	08	3	HABEL GmbH & Co. KG NL			
		9	HABEL Espania - No estructurado	de la empresa		
	9	9	Dummy Belegleser Firma			•
			<<	<u>C</u> opy (F9)		
Copyright © 1996-2011 by HABEL GmbH & Co. KG, 78604 Rietheim-Weilheim						06/07/2011 14:59 🔐

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

Program: HPHAB200 Li	st					
Name	Description	V.,	A	Vali	Vali	Wit
⊡- 👷 User	mabele	001				
Annotations/Note/New	Recht		~			+
📄 🚊 Find	Recht		×			+
📄 📴 BelGrp	Allgemein	01	×			+
🔤 👬 🖓 Firma	HABEL GmbH	01	$\checkmark$			+


IV. Administration HABEL USER MANAGER

### 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".

User rights manager [Recherche]		
File Edit Access Info		
Program: HPHAB200 List Name Description V A. Vali Vali Wit User mabele 001 Subser Macht Annotations/Note/New Recht Find Recht A Find Rech	User         Groups           Us /         LoginName         Name           001         mabele         Abele, Matin           002         fauer         Auer, Franz           003         sbanzhaf         Banzhaf, Sandra           004         kbutschle         Butschle Klaus           005         doskar         Dilger, Oskar           006         heisenmann, Heike         007           007         pemig         Emig, Paula           008         hrifedrich         Friedrich, Helmut           009         afrisen         Frisen, Andreas           Copy rights to gser         Copy rights to gser	Copy rights to group Subdocument type   DB fields   Edit fields   Left
	BelArt / Text	
	Ellip: UI	
	Firma: UI     W Anfrace	
	0001 VK Annage	
	0003     VK Kalkulation	
	> 0004 VK Bestellung	
	0005 VK Auftragsbestätigung	
	0006 VK Fertigungsauftrag	
	0007 VK Lieferschein	<b>v</b>
	· · · · · · · · · · · · · · · · · · ·	Copy (F9)

Name	Description	Value	Al Valid 🛆 Valid to	Within d
🖃 🕵 User	mabele	001		
Sections/Note/New	Recht		×	+
🖻 🔒 Find	Recht		×	+
🛱 📴 BelGrp	Allgemein	01	×	
🖻 🏟 Firma	HABEL GmbH & I	C 01	$\checkmark$	- <del> -</del>
🖹 BelArt	VK Anfrage	0001	×	+
🖹 BelArt	VK Angebot	0002	×	+
🖹 BelArt	VK Kalkulation	0003	×	-+
	VK Bestellung	0004	×	+



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### 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.





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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.

Entry	
Define permission values. Operators are surrounded by square surrounded by curly brackets. You can specify multiple values semicolons [:]. The following operators are available:	d brackets, while examples are by separating them with
[] - Declares a range, e.g.: "10002000". Ranges can only be e. g.:	e used in connection with digits.
{10002000;25003000;}	
[!] - Forbids a value. This operator has to be set individually for	each value, e.g.:
{10002000;25003000;120012499;}	
[~] - Case insensitivity. This operator has to be set individually f	oreach value, e.g.:
{~HABEL} would evaluate hits like "Habel", "habel", "HABEL'	' oder ''haBel'' as valid.
[?] - Placeholder for any character at the chosen position. e. g.	:
{?ABEL} results in "LABEL" and "HABEL".	
[*] Replaces an unlimited number of characters at the chosen p value will always be valid, if the operator was set prior to the va operators following the value. Everything between two values of set between two values.	position. Everything prior to the alue. The same applies for the will be valid, if the operator was
Variants: {"GMBH} - Evaluates every hit as valid, if ''GMBH'' shows up a ''HABEL GMBH'' or ''Example Company GMBH''	t the end of the term. e.g.:
{HABEL*} - Evaluates every hit as valid, if "HABEL" shows up g.: "HABEL GmbH & Co. KG" or "HABEL Dokumentenmanage	at the beginning of the term. e. ement GmbH''
$\{H^*L\}$ - $E$ verything beginning with $H$ and ending on $L$ is valid. e	.g.: "HABEL" or "HALL"
(***) - Represents empty database fields. If this value is set, the execute a function, while the field is empty.	user will only be allowed to
{@@} - If this operator is set, the user must not execute a func	tion, while the field is empty.
Wert(e) für AKstTr:	
OK Car	ncel

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.



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#### 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		×		+
🖻 🎯 BelGrp	Allgemein	01	×		- <del></del>
🔤 🎆 Firma	HABEL GmbH & Co. KG	01	×		+



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 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.

		Copy rights	to <u>u</u> ser	Copy rights to group	
6	l Benu	tzer	<u></u>		x
Γ		a si al			-
	U 🛆	LoginName	Name		
≥	002	fauer	Auer,Franz		
	003	sbanzhaf	Banzhaf,Sandra		=
	004	kbutschle	Butschle,Klaus		
	005	doskar	Dilger,Oskar		
	006	heisenmann	Eisenmann,Heike		
	007	pemig	Emig,Paula		
	008	hfriedrich	Friedrich,Helmut		
	009	afrisen	Frisen,Andreas		
	010	agabel	Gabel,Alexander		
	011	kgerth	Gerth,Kurt		
	012	mhause	Hause, Manfred		Ŧ
			<u>C</u> (	opy <u>C</u> lose	

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

Copy rights to group				
6	Gru	ippen 🗆 🗆 🗙		
		1972/1972/1972/1972/1972/19		
	ēА	Name		
₽	300	SOFTWARE		
	310	ENTWICKLUNG		
	320	PERSONAL		
	330	GF		
	340	VERTRIEB		
	350	Finanzbuchhaltung		
	360	Qualitätssicherung		
	999	Systembetreuer		
		<u>C</u> opy <u>C</u> lose		



IV. Administration HABEL USER MANAGER

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.

Confirm	
Really copy rights?	
Yes No Cancel	

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 <u>not</u> just the new rights.

Confirm	X
?	Rights still exist for Benutzer (Auer, Franz); should they be overwritten?
	Yes No Cancel

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.

User	Groups	ž
	3	2
Gree	• ne	

Tip: If you have users/groups that largely have the same rights, it is

worthwhile coping 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.



IV. Administration HABEL USER MANAGER

### 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 <u>HABEL</u> <u>ANNOTATIONS</u> 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 <u>always</u> 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.



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### 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 ANNOTATIONSANNOTATIONS** 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 <u>HABEL EXPORT</u> 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.



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### 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.



IV. Administration HABEL USER MANAGER

### 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 <u>HABEL ANNOTATIONS</u> 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 <u>HABEL ANNOTATIONS</u> 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 <u>always</u> 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)

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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.



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### 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.

Document type	Subdocument type	DB fields	Edit fields	UserID
Description				

### Edit post basket entries

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



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*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.



IV. Administration HABEL USER MANAGER

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.





**IV. Administration** HABEL MASK EDITOR

### 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.





IV. Administration HABEL MASK EDITOR

# 2. Program structure

Mask configuration		
File Extras Settings Info		
Active fields:	Field properties ↓ Show selection boxes ↓ Display field positions	Program mask:
Available fields:		
Sort Display unused fields		
	Show change details	<u>S</u> ave

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.



IV. Administration HABEL MASK EDITOR

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.

Mask configuration				
File Extras Settings Info				
Active fields:          Active fields:         Active fields:         Active fields:         Display unused fields         Sort       Display unused fields	Field properties         ▼ Show selection boxes         □ Display field positions         Serial number:         Field name:         □ Display length (in pixels):         Search direction:         ▼         Required field:         Field type:         Field type:         Field with:         Alignment:         Write protected:         Read with company:         ComboBox without entry:ohne Eing         Delete field:         Capitalization:         Check length:         Access type for master access:         Transfer field from master:         Master database:         Search with field in master:         Default value:         Input mask:         Field name:	Program mask: Scan Kofax Document types: 0001 - SLS Enquiry 0002 - SLS Offer 0003 - SLS Calculation 0004 - SLS Order confirmation 0006 - SLS Manufacture Do 0007 - SLS Delivery note 0008 - SLS Shipment Docum 0009 - SLS Invoice 0010 - SLS Credit memo 0011 - SLS Specifications 0011 - SLS Specifications 0012 - Supplier Inquiry 0013 - Supplier Order con 0016 - Supplier Order con 0016 - Supplier Order con 0017 - Supplier Delivery : 0018 - Supplier Return no 0019 - Supplier Return no 0019 - Supplier Credit mem 0026 - Product information 0029 - Service contract 0033 - SLS Correspondence 0034 - Supplier Correspont 0035 - SLS Reminder 0037 - Supplier reminder 0038 - SLS Fair report 0039 - Verträge 0044 - Support 0050 - Competitor Document 0051 - Press reports 0053 - SLS Visiting Report 0056 - SLS Visiting Report 0056 - Finance Invoice: 0070 - Bewerbung 0071 - Contract of employ; 0072 - Denunciation Verträge 0041 - Supplier Price list 0051 - Contract of employ; 0071 - Contract of employ; 0072 - Denunciation Verträge 0074 - Supplier Price list 0075 - SLS Visiting Report 0075 - SLS Visiting Report 0071 - Contract of employ; 0072 - Denunciation Verträge 0074 - Supplier Price list 0075		
		//		



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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.



IV. Administration HABEL MASK EDITOR

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

Mask configuration					
File Extras Settings Info					
Active fields:	Field properties	Program mask:			
Company: Firma	Show selection boxes	Scan Kofax 💌			
Document type: Belart	Display field positions	Document types:			
Document No.: Bar1	Serial number: 001	0001 - SLS Enquiry			
Document date: BelDt	Field name: Firma	0002 - SLS Offer 0003 - SLS Calculation			
Offer No.: AngebNr	Display length (in pixels):	0004 - SLS Order			
External Document No.: FBelNr	Search direction:	0005 - SLS Order confirmat			
Order No. (internal): AuftrNr	fixed v	0007 - SLS Delivery note			
Projektnummer: ProjNr	Required field: Yes	0008 - SLS Shipment Docum			
Projektbezeichnung: ProjBez	Field type: ComboBox	0009 - SLS Invoice 0010 - SLS Credit memo			
Delivery Note No.: LfsNr	Fill out field with:	0011 - SLS Specifications			
Invoice No.: RechNr	Alignment:	0012 - Supplier Enquiry 0013 - Supplier Offer			
Customer/Supplier No.: KuLiNr	Write protected:	0014 - Supplier Order			
	No V	0015 - Supplier Order con:			
	Read with company: No	0017 - Supplier Delivery 1			
Location: Ort	ComboBox without entry:ohne Eing No	0018 - Supplier Return not			
1K7:1K7	Delete field:	0019 - Supplier Invoice 0020 - Supplier Credit men			
Article No.: ArtNr	Capitalization:	0026 - Product information			
	Check master field:	0029 - Service contract 0033 - SLS Correspondence			
Available fields:	Value must be found	0034 - Supplier Correspond			
		0035 - Service report 0036 - SLS Peminder			
Emptanger bei Archivierung Postkorb: IntoAP	Access type for master access: flush left	0037 - Supplier reminder			
Empfänger bei Archivierung ist vorgesetzter: IntoAv	Transfer field from master:	0038 - SLS Fair report			
Empfänger bei Wiedervorlage Postkorh: WiVoAP	Master database:	0044 - Logs			
1. Empfänger bei Wiedervorlage ist Vorgesetzter: WiVoAV	Search with field in master:	0050 - Competitor Documen			
1. Empfänger zu Ablauf Gültigkeit E-Mail: GuelAE	Defaulturing	0051 - Press reports 0053 - Drawings			
1. Empfänger zu Ablauf Gültigkeit Postkorb: GuelAP	Default Value: 01	0056 - SLS Visiting Report			
1. Emofänger zu Ablauf Gültigkeit ist Vorgesetzter GuelAV	Input mask:	0063 - Supplier Price lis: 0066 - Finance Invoice:			
Sort Display unused fields	Field name: Company:	0099 - Belegleser Dokumen			
Display system fields		0101 - Abrechnungsbeleg 👻			
Show change details					
		11.			



IV. Administration HABEL MASK EDITOR

3. Menu bar

File	Extras	Setting
	Save	
	Close	

### 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.





File Extras Settings Info			
Active	Document types adminstration		
Con	Document group overview		
Doc	Generate new program mask from the entry screen		
Doc	Copy mask to		
Doc	Restore		
Ext	Create new database fields		

### 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).



IV. Administration HABEL MASK EDITOR

### 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

Receipt group overview	
Select document type:	Exists in receipt group:
0001 - VK Anfrage 0002 - VK Angebot 0003 - VK Kalkulation 0004 - VK Bestellung 0005 - VK Auftragsbestätigung 0006 - VK Fertigungsauftrag 0007 - VK Lieferschein 0008 - VK Speditionsauftrag 0009 - VK Rechnung 0010 - VK Gutschrift 0011 - VK Pflichtenheft 0012 - EK Anfrage 0013 - EK Angebot 0014 - EK Bestellung 0015 - EK Auftragsbestätigung 0016 - EK Liefermahnung 0017 - EK Lieferschein 0018 - EK Rücklieferschein 0019 - EK Rucklieferschein 0019 - EK Gutschrift 0020 - EK Gutschrift 0020 - VK Korrespondenz	G01 - Habel DIG Allgemein P01 - Archive printer Allgemein R08 - DIV S01 - Scan KFX/TWN/CLI Allgemein Z01 - ScanSnap Allgemein Z01 - ScanSnap Allgemein Program mask: Scan Kofax Document types: 0001 - SLS Enqui 0002 - SLS Offer 0003 - SLS Calcu 004 - SLS Order 0005 - SLS Order 0005 - SLS Order
	10005 - SLS Order confirmat



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Mask configuration					
File Ext	ras Settings Info				
Active	Document types adminstration		properties		
Con	Document group overview		Show selection boxes		
Doc	Doc Generate new program mask from the entry screen Display field positions				
Doc	Copy mask to		ial number: 001		
Doc	Restore	•	Restore HDHABCFG		
Off	Create new database fields		Restore HDHABPAR		

### Extras – Generate new program mask from the entry screen the entry screen

With this command, new masks can be generated from existing data entry masks. <u>Important</u>: 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.

Öffnen		x
Suchen in: 🚺 backup 💌	← 🗈 💣 📰 ▾	
Name	Änderungsdatum	Ту
🔋 🌗 belegleser	27.05.2010 17:39	Di
HDHABCFG.TXT.2011062813403100000001.T	28.06.2011 13:38	Τŧ
•		•
Dateiname:	Öffnen	
Dateityp: HDHABCFG Backup	- Abbrechen	



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File	Extras Settings Info	
Active	Document types adminstration	
Cor	Document group overview	
Doc	Generate new program mask from the entry screen	
Doc	Copy mask to	
Doc	Restore	•
Off	Create new database fields	

### 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).

File Extras	Sett	ings Info
Active fields:	$\checkmark$	Ask about comprehensive changes each time
Company: Fi		Always for all document types
Document ty		Always for other masks
Document No		Save the last mask selection and do not ask again
Document da		
Offer No.: A		Default values for new fields

### Settings - Ask about comprehensivecomprehensive changes each time

"ComprehensiveComprehensive 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 comprehensivecomprehensive 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. <u>Important</u>: 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. <u>Important</u>: 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.



IV. Administration HABEL MASK EDITOR

File Extras	Sett	ings Info
Active fields:	✓	Ask about comprehensive changes each time
Company: Fi		Always for all document types
Document ty		Always for other masks
Document No		Save the last mask selection and do not ask again
Document da		
Offer No.: A		Default values for new fields

### 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.).

Enter default values for new fields				
Mask type: Entry screen	2			
Field properties Show selection boxes Display field positions				
Display length (in pixels):	150			
Search direction:	no editing			
Required field:	No 💌			
Field type:	Standard 💌 🔨			
Fill out field with:				
Alignment:	flush left 🗨			
Write protected:	No 💌 🔪			
Read with company:	No			
ComboBox without entry:	No 🔹			
Delete field:	header field 💽 🧹			
Capitalization:	normal font/characte 💌 🧼			
Check master field:	value must be found -			
ne	A second			



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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.

Mask configuration		
File Extras Settings Info		
Active fields:	Field properties	Program mask:
	Show selection boxes	Scan Kofax
Company: Firma	Display field positions	Document types:
Document type: Belart	Serial number:	0001 - SLS Encuiru
Document No.: Bar 1		0002 - SLS Offer
Document date: BelDt	Field name:	0003 - SLS Calculation
Offer No.: AngebNr	Display length (in pixels):	0004 - SLS Order
External Document No.: FBelNr	Search direction:	0006 - SLS Manufacture Do
Order No. (internal): AuftrNr		0007 - SLS Delivery note
Projektnummer: ProjNr	Required field:	0008 - SLS Shipment Docum
Projektbezeichnung: ProjBez	Field type:	0010 - SLS Invoice
Delivery Note No.: LfsNr	Fill out field with:	0011 - SLS Specifications
Invoice No.: RechNr	Alignment	0012 - Supplier Enquiry
Customer/Supplier No.: KuLiNr		0013 - Supplier Offer 0014 - Supplier Order
Name: KuLiNam	Write protected:	0015 - Supplier Order con:
E-mail: email	Read with company:	0016 - Supplier Order rem
PLZ: PLZ	ComboBox without entry:ohne Eind	0017 - Supplier Delivery 1 0018 - Supplier Return no
Location: Ort		0019 - Supplier Invoice
LKZ: LKZ		0020 - Supplier Credit men
Article No.: ArtNr	Capitalization:	0026 - Product information 0029 - Service contract
,	Check master field:	0033 - SLS Correspondence
Available fields:	Chack lengths	0034 - Supplier Correspond
		0035 - Service report 0036 - SLS Reminder
1. Empfanger bei Archivierung Postka	Access type for master access:	0037 - Supplier reminder
Empranger bei Archivierung ist vorgesetzter: InfoAv	Transfer field from master:	0038 - SLS Fair report
Companyer Der Wiedervorlage E-Mail: WivoAE	Master database:	0039 - Vertrage 0044 - Logs
1. Emptanger bei Wiedervorlage Postkorb: WivoAP		0050 - Competitor Documen
Empranger bei Wiedervorlage ist Vorgesetzter: WiVoAV	Search with field in master:	0051 - Press reports
Empranger zu Ablauf Gultigkeit E-Mail: GuelAE	Default value:	0053 - Drawings 0056 - SLS Visiting Report
1. Empfanger zu Ablauf Guitigkeit Postkorb: GuelAP	Input mask:	0063 - Supplier Price list
Emotander zu Ablaut Gultinkeit ist Vordesetzter GuelAV	Field name:	0066 - Finance Invoice:
Sort Display system fields		0101 - Abrechnungsbeleg
		J
	Show change details	Save Close

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).



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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.

Sort
------



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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).





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





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Field properties ✓ Show selection boxes ✓ Display field positions	1
Serial number:	013
Field name:	AuftrNr
Display length (in pixels):	150
Search direction:	no editing 💌
Required field:	No

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).				
0					
Search	The velue of the term cought is left/right fluch cligand in				
direction	The value of the term sought is left/right-flush aligned in flush left				
	flush ride				
	Fixed or float(free)				
	The value must tally precisely with the term sought *SQL search*				
	(fixed) or it is sufficient if only parts of the database field				
	content match the term sought.				
	*SQL search*				
	* are placed before and behind the value entered, which triggers a float search				
	with SQL databases.				
	No oditing				
	No longer active				
	Information field				
	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).				
Required field	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 neid without input is not Yes with check				
	hozanie.				



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



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

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)



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Fill out field with:		
Alignment:	flush left	•
Write protected:	<b>V</b> No	•
Read with company:	No	•
ComboBox without entry:o	hne Eing <sub>No</sub>	•
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</i> + <i>name</i> )				
Delete field	Can only be defined for the fields in the data entry masks Head field The field is defined as a head field and is emptied after saving the data entry. Position field The field is defined as an item field and is emptied after the item is saved. Never delete field 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. only delete after "Save position" Field is emptied after "Save position" but remains filled after saving (of the				



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Capitalization	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.			
Check master field	value must be found, ignore with 'Escape'         if not found, a dialog appears         a beep sounds if not found         if not found, a dialog appears You can only leave by deleting.         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.			
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.			



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

Master database	Definition of the file name of the master file/master database when the master is accessed			
Search with field	Definition in which field in the master database the search is carried out with			
in master	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 formating (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.

	🔽 Sho	ow chang	e details	]	<u>S</u> ave	Close
ſ	🛕 Tran	saction				
	Statu	s 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 🖉
	todo	2	hd	UPDATE	before	00100100000000100048FBelNr 1500000
		A DESCRIPTION OF	A	1. A. C.	ofter	0 0 0000000000000000

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



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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:

Confirm	
?	Change field "Belegnummer: Bar1" for all document types that use this field?
	Yes Cancel

### and if there are several program masks

Confirm	×
?	Accept the change in the field "Belegnummer: Barcode" in other program masks?
	Yes Cancel

you can select the respective mask here.

N	Mask selection					
<ul> <li>Personal</li> <li>Spedition</li> <li>Tribiquity</li> <li>Vertragsmanagement</li> <li>Adata Lohn/Personal</li> <li>Fidelio</li> </ul>						
	<u> </u>					



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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.

Informati	ion				
The masks Scan Kofax, Archive printer, Habel DIG, ScanSnap, Scan Twain, Client Index are linked. Eac mask affects the masks Scan Kofax, Archive printer, Habel DIG, ScanSnap, Scan Twain, Client Index.					
	OK				

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.

Creat	e data fields (on	ly mySQL)				
File						
Databas	e	10.111.0.0201		•		
hdhab070 (HDHA8070) hdhab650 (hab650_doc) hdhab870 (HDHA8870) hdhaberr (HDHA8ERR) hdhaborr (HDHA8ERR) hdhaborn (HDHA8PCN)						
hdhbi031 (HDHBL031 (Personal))						
	<u>Create new field</u> Move newly created fields by drag and drop					
Ready			Save			


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

Create data fields (on	y mySQL)				23
File					
Database hdhbl030 (P	New field			×	Ð
Name D					
DateiNr D SeiteNr S	Field name				
WormNr V	Label				
ScCoKz St FormNr Ft	Field type		•		
Firma Fi	Field length				
Filiale Fi	Keu field				
LIBelArt I	Key neid	V			
Barcode B		Nei		nse	
BelDt 👥				560	
ErfDat EL	_				
AngebNr An	gebot Nr	Alpha	50	Irue	-
BestNr Be	stell Nr	Alpha	50	Irue	_
FBeiNr / Fre	mabelegnummer	Alpha	30	True	
<u>C</u> reate new field	Move new!	y created fields by	drag and drop		
Ready			<u>S</u> ave	<u>C</u> lose	

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.

New field	×
Field name	Language
Label	Language
Field type	<b>_</b>
Field length	Zahl
Key field	Datum Zait
	Boolean Close



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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:

Confirm	×
?	Should the field also be created in all *SIC tables?
	<u>Y</u> es <u>N</u> o

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.

File											
Database hdhbl030 (HDHBL030 (Allgemein))											
Name	Description	Туре	Length	Index							
DESURL	URL unter das Handbu	Alpha	255	True							
DECNr	Sortierung Kapitel/ Abs	Alpha	5	True							
DEDSWNr	Datei-/ Seite-/ Wormnu	Alpha	40	True							
DEFields	Alternativen zu Datei-/	Alpha	255	True							
DECName	Name des Kapitel/Abs	Alpha	50	True							
DEPage	Seitenangabe von-bis	Alpha	100	True							
DEDBName	Datenbankname aus d	Alpha	17	True							
Betreff	Betreff	Alpha	150	True							
Info	Info	Alpha	250	True							
HBLPosID	HABEL Pos. ID	Zahl	8	True							
HBLPosSN	HABEL Pos. SN	Zahl	8	True							
AnnNr	AnnotationNr	Alpha	10	True							
AnzBel	Anzahl Seiten	Alpha	5	False	_						
GesBel	Gesamt Seiten	Alpha	5	False							
Language	Language	Alpha	20	True	Ŧ						
Create new field Move newly created fields by drag and drop											
Beadu		Save Close									

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.



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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.

Mask configuration		
File Extras Settings Info		
File       Extras       Settings       Info         Active fields:	Field properties         Show selection boxes         Display field positions         Display length (in pixels):         Sortbezeichnung:         Headerbezeichnung:	Program mask: Allgemein (PosBox) Document types: 0001 - SLS Enquiry 0002 - SLS Offer 0003 - SLS Offer 0003 - SLS Order confirmation 0004 - SLS Order confirmation 0005 - SLS Martacture Do 0007 - SLS Delivery note 0008 - SLS Shipment Docum 0009 - SLS Invoice 0010 - SLS Credit memo 0011 - SLS Specifications 0012 - Supplier Offer 0014 - Supplier Order cont 0015 - Supplier Order cont 0015 - Supplier Order cont 0016 - Supplier Order cont 0017 - Supplier Order cont 0016 - Supplier Order cont 0017 - Supplier Order cont 0019 - Supplier Invoice 0020 - Supplier Invoice 0020 - Supplier Invoice 0020 - Supplier Contempt 0029 - Service contract 0033 - SLS Correspondence 0034 - Supplier Correspont 0035 - Service report
Einzelpreis EPreis Fremdartikelbezeichnung FArtBez Fremdartikelnummer FArtNr Gesamtpreis PosBet Konto Konto Konto Bez. KontoBez Kostenstelle KstNr Kostenstelle Rez. KstRez Sort Display unused fields Display system fields		0036 - SLS Reminder 0037 - Supplier reminder 0038 - SLS Fair report 0039 - Verträge 0044 - Support 0050 - Competitor Documen 0051 - Press reports 0053 - Drawings 0056 - SLS Visiting Repor 0063 - Supplier Price lis 0066 - Finance Invoice: 0070 - Bewerbung 0099 - Belegleser Dokumen 0186 - Kundenzeichnung +
	🔽 Show change details	Save Close



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

Document type editor	an Manten	
0001 - SLS Enquiry 0002 - SLS Offer 0003 - SLS Calculation 0004 - SLS Order 0005 - SLS Order confirmation 0006 - SLS Manufacture Document 0007 - SLS Delivery note 0008 - SLS Shipment Document 0009 - SLS Invoice 0010 - SLS Credit memo	Receipt group: G01 - Habel DIG Allgemein G02 - Habel DIG Personal G03 - Habel DIG Spedition G04 - Habel DIG Vertragsmanagement G06 - Habel DIG Adata G07 - Habel DIG Fidelio P01 - Archive printer Allgemein P02 - Archive printer Personal D03 - Archive printer Personal	All None
0011 - SLS Specifications         0012 - Supplier Enquiry         0013 - Supplier Offer         0014 - Supplier Order         0015 - Supplier Order confirmat         0016 - Supplier Order reminder         0017 - Supplier Delivery note         0018 - Supplier Return note         0019 - Supplier Invoice	Client: 01 - HABEL GmbH & Co. KG 02 - HABEL Dokumentenmanagement GmbH 03 - HABEL Beteiligungsgesellschaft mbH 06 - Ungarn Volltext 07 - DocuGroup Kft. UNDEL Coll of Works Subdocument type:	All None
0020 - Supplier Credit memo 0026 - Product information 0029 - Service contract 0033 - SLS Correspondence 0034 - Supplier Correspondence 0035 - Service report 0036 - SLS Reminder 0037 - Supplier reminder 0038 - SLS Fair report 0038 - Verträge	Full text document type     Name:	Add Change Delete
Copy document type	Show change details New Save Dele	te Close

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".



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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 subdocument 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).



### IV. Administration HABEL MASK EDITOR



### 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 (I6)

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).



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Copy document type	Show change details	New	Save	Delete	Close
--------------------	---------------------	-----	------	--------	-------

### 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.

A Transac	tion			The second s
Status	N DB	Action	Status	Record
todo	7hd	UPDATE	before	HDALGBELEGART 0001
			after	HDALGBELEGART 000101;02;03;06;07;08;09;10;
todo	7hd	DELETE	befor	HDALGBELEGART000100101;02;03;06;07;08;09;10;
todo	7hd	UPDATE	before	HDALGBELEGGRP P0220082;0083;0084;0085;
1. 1		A 470	After	HDALGPELEGGRP - 20220002-0081 0084;0005-0001:

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.



IV. Administration HABEL MASK EDITOR

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.

Generate new program mask fro	m the ent	ry screen		x
Source	Targel	t:		-
Client Index (PosBox)	ails	Save	Close	

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

🛕 Transa	action					
Status	N DB	Action	Status	Record		
todo	7hd	DELETE	befor	00100100000000200001Firma	40X101	0 00
todo	7 hd	DELETE	befor	00100100000000200002Belart	40X001 (	0 00 🖪
todo	7hd	DELETE	befor	00100100000000200003BelDt	100F000 (	0 00 🧹
todo	7hd	DELETE	befor	00100100000000200004Barcode	200F000 (	0 00 🎽
todo	7hd	DELETE	befor	00100100000000200005AngebNr	2000000	0 00 🔨
todo	7hd	DELETE	befor	00100100000000200006AuftrNr	2000000	0 00
todo	7hd	DELETE	befor	00100100000000200007LfsNr	2000000	0 00 🏼 🎜
todo	7hd	DELETE	befor	00100100000000200008RechNr	2000000	0 00 🗅
todo	7hd	DELETE	befor	0010010000000200009GsNr	2000000	0 00 🔨
todo	7hd	DELETE	befor	00100100000000200010AnfrNr	2000000	0 00
todo	7hd	DELETE	b for	07*1010000000200011Bea+Nr	200W000-	00
			F F	P		The second se

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



IV. Administration HABEL MASK EDITOR

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.

Copy mask
Mask of the document type
0026 - Product information
Copy according to document type
0044 - Support 👻
<u> </u>

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 fom the entry screen" compared to "Copy mask to" With "Generate new program mask fom 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.



IV. Administration Error lists

### 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. <u>Note</u>: The employee does not have to be an administrator.



IV. Administration **Error lists** 

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.

🖪 НАВ	BEL - Error lo	gs							
File I	Edit Extras	View Info							
Zoom	in document	Print docume	nt	Print error log		A <u>n</u> alysis	X Delete record		Stop
				Drag column to sort in	here.			Select list type: List of missing host data List of documents not yet scanne	ed (HDHAB070)
	Select lis	st type:						Show already merged host da	ta s
	List of n	nissing host d	ata			-		Refresh	
Doc	Comp Docu Barce	p <mark>any 02</mark> ument ty 00 ode 95	01 54	HABEL Dokur SLS Enquiry	menten	im •		Quit	
Ready:	i i i i i i i i i i i i i i i i i i i								ii.
	Shov	v already mer	ged k	nost data					
		I	Vew	Search					



IV. Administration Error lists

Overview of the buttons and respective menu selection / functional keys

A	HABEL - Error logs		
Fil	e Edit Extras View	Info	
C Zo	om in document Print do	current Brint error log	
	Meaning	Explanation	Menu selection / Functional I
0	Enlarge document	The document is displayed in full-image mode. To close this preview, click on X	Display – Zoom in document F11
0	Print file	The document is printed out.	File – Print – Print document CTRL + D
₿	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
6	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. Confirm Only mark entry as supplemented? Click "yes", if you want to mark this entry as supplemented, or "no" to delete it completely.(Remark: Subsequent barcode-receipts won't be supplemented until new data



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Error lists

Additional commands that can be reached via the menu selection

File	Edit Extras	View Info
	New instance Print	Ctrl+Y
	Quit	Alt+F4

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.

Viev	/ Info		
	Zoom in document		F11
	Columns		Ctrl+F3
✓	Optimal column-width	2	Ctrl+O

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.



IV. Administration Error lists



Edit	Extras View	Info	
	New Search		Strg+
	Stop	N	Strg+T
	Refresh	13	)
	Save ob es	and the second	Stro

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.



IV. Administration **Error lists** 

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).

HABEL - Error logs	-		
File Edit Extras View Info			
∑oom in document	E Print error <u>l</u> og /	ngalyse Delete record	Stop
HABEL	Drag column to sort in h	ire.	Select list type:
WI MICHIN COLUMNT DI MINISE     Manageri dei     Man	Image: Fehler         Dateinur W0           2400027         2400027           2400028         2400013           2400019         2400019           2400020         2400020	IRM-N         Benutzernam         Erfassun         Firr         Bel         Belegnur           1         mike.schmitt         28/04/2         02         000         9554           1         mike.schmitt         28/04/2         01         000         9559           1         mike.schmitt         28/04/2         01         001         9579           1         mike.schmitt         28/04/2         01         001         9578           1         mike.schmitt         28/04/2         01         001         9528           1         mike.schmitt         28/04/2         01         001         9524           1         mike.schmitt         28/04/2         01         001         9524           1         mike.schmitt         28/04/2         01         001         9524	Company         02         HABEL Dokumentenm ▼           Document ty         0017         Supplier Delivery note         ▼           Barcode         300496
ACM/Met Reset 12/38	2400030	1 mike schmitt 28/04/2 02 001 30049	Strg+A
		Copy host data record View document in Retrieval	Alt+C g+G New Search 3
		Columns Merging	Strg+F3 Save changes Strg+M
			Refresh 5
Document preview			<u>Quit</u>
7 records found			

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.



IV. Administration Error lists

### 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.

[	Z Drag co <mark>B</mark>	eleg 🗲 it i						5
:	Fehler	Dateinum	WORM-N	Benutzernami	Erfassun	Firm	Beli	Beleg
		2400027	1	mike.schmitt	28/04/2	02	000	95
		2400028	1	mike.schmitt	28/04/2	01	000	
5	A	240004.9	1	rike.schmitt	29/04/2	01	p11	

### 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).

🖪 HABEL - Erro	or logs	And in case		_			
File Edit Ex	tras View Info						
Zoom in docume	nt <u>P</u> rint document	errint error <u>l</u> og	А		)elete re	ecord	
Drag column t	o sort in here.						
E Fehler	Deligummer WO	RM-Numme Benutz	zername	Erfassungsdat	Firma	Beleg.	Belegnummer
	2 10027	1 mike.s	chmitt	28/04/2009	02	0001	9554
	00028	1 mike.s	chmitt	28/04/2009	01	0005	9559
▶	2400013	1 mike.s	chmitt	28/04/2009	01	0015	9579
1	Error code: 2	3	hmitt	28/04/2009	01	0017	9528
	Enor code. E		hmitt	28/04/2009	01	0017	9524
	Error causes:	ned	hmitt	28/04/2009	01	0017	300495
	- Dossier alleady men	yeu.	hmitt	28/04/2009	02	0017	300496
	Proposal for solution: - Delete error log entr	у.	J				



### WE CONVERT DOCUMENTS INTO ENERGY IV. Administration

Error lists

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.

Colour settings	for error codes
Colour Error c 4096 2048 1024 512 255	vode     Short description       Wrong additional merging field.       Incomplete dossier       Merged data found
236 128 64 32 16 8 4 4 2	Wrong company and document type Wrong document type Wrong company Barcode was corrected via Retrieval Company was corrected via Retrieval Document type was corrected in Retrieval Already merged R: G: B:
	OK Cancel

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

Error code: 64	×
Error causes:	
- Es existieren möglicherweise die richtigen Mischdaten u	nter einer anderen Belegart. (0004)
	Show possible data
	6
Proposal for solution:	Possible data
- Change document type to "0004".	Firma Belegart Barcode Belegdatum Ku/Li-Nr Name 01 0004 9559 26052009 23317 Interconnect AG
L	
	Apply record Close



### WE CONVERT DOCUMENTS INTO ENERGY IV. Administration Error lists

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).

A	HABEL -	Error lo	gs	_								
F	le Edit	Extras	View In	fo								
Z	pom in doc	ument	Print docum	ent Print er	ror jog	A <u>n</u> aļ	yse	<b>X</b> Delete	<b>K</b> record			Stop
											Select list type:	
	Fehler	D	ateinummer	WORM-Numme	Benutzername		Erfassungsdat	Firma	Beleg	Belegnummer	List of missing host data	•
			2400027	1	mike.schmitt		28/04/2009	02	0001	9554	Company 01	HABEL GmbH & Co. K 🔻
			2400028	1	mike.schmitt		28/04/2009	01	0005	9559	Document ty 0015	Sugalier Order confirm: 🔻
	•		2400013	1	mike.schmitt		28/04/2009	01	0015	9579	Barcode 9744	1
			2400019	1	mike.schmitt		28/04/2009	01	0017	9528		
			2400020	1	mike.schmitt		28/04/2009	01	0017	9524		•
ŀ			2400029	1	mike.schmitt		28/04/2009	01	0017	300495		
	-										Show already merged	host data
											New	/ <u>S</u> earch
											Save	<u>c</u> hanges
											R	efresh
												Quit
7	ecords fo	und										

Company	01	HABEL GmbH & Co. K 🔻
Document ty	0015	Supplier Order confirma 🔻
Barcode	97 <mark>44</mark>	

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.

≣ Fehler	Dateinummer	WORM-Numme	Benutzername	Erfassungsdat	Firma	Beleg	Belegnummer	List of missing host data
	2400027	1	mike.schmitt	28/04/2009	02	0001	9554	Company 01 HABEL GmbH & Co. K
	2400028	1	mike.schmitt	28/04/2009	01	0005	9559	Document ty 0017 Supplier Delivery note
	2400013	1	mike.schmitt	28/04/2009	01	0015	9579	
	2400019	1	mike.schmitt	28/04/2009	01	0017	9528	40
» <b>(</b>	2400020		mike.schmitt	28/04/2009		0017	9524	1
	2400029	1	mike.schmitt	28/04/2009	01	0017	300495	
	2400030	. 1	mike.schmitt	28/94/2009	02	0017	300496 🚄	

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



### WE CONVERT DOCUMENTS INTO ENERGY IV. Administration

Error lists

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.

Extras View Info		Dateinummer	WORM-No	umme Benutzername	Erfassung	sdat Firma	B
Adjust color	Ctrl+0	2400027		1 mileo oolomitt	20708720	na Inc	0
Merging	Ctrl+M	2400028		Select all		Strg+A	
Furnest to LITM	NT	2400013		Courts and hash data area		Chan M	
Export to HTIML	Ŭ	2400019		Create new nost data	record	Strg+N	
		2400020		Copy host data record		Alt+C	
		2400029		View document in Retrieval		Strg+G	
		2400030					
				Columns		Strg+F3	
				Merging	T	Strg+M	

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.

Edit	Extras View Info	
	New Search	Strg+S
	Stop	Strg+T
	Refresh	
	Save changes	Strg+E
	Delete record	
	Select all	Strg+A
	Analyse	Strg+W
	Create new host data record	Strg+N
	Copy host data record	Alt+C



IV. Administration Error lists

х 🛕 Create host data HABEL Dokumentenmana; 💌 Company. Document type 0001 SLS Enquiry 4 Document No. 0000009554 0 Document date Ŧ Offer No. External Docum... ø Order No.(intern... Delivery Note No. Invoice No. Customer/Supp... ,0 Name 9 9 PLZ Location ø LKZ p Article No. Article name Serial No. Subject Info Cancel Create record

### 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.

Extras \	/iew Info	
Adj	ust color	Ctrl+Q
Me	rging N	Etrl+M
Exp	ort to HIW	L

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



IV. Administration **Error lists** 

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.

HABEL - Error logs									
File	Edit Extras	Vie	w In	fo					
<u>Z</u> o(	pm in document		Print o	locument	Print error	og	Analysis Delete record	d	Stop
								^	Select list type:
- 1	∃ Fehler	Firm	Beleg	Belegnummer	Belegdatum	Ku/Li-N	Name		List of documents not yet scanned (HDHABU70)
. 1		08	0013	9504	6/1/2007	70528	Bergmann Software Ring		Company
- 1		08	0013	9504	6/1/2006	70528	Bergmann Software Ring		Company
- 1		08	0013	9574	7/1/2006	70527	DIGI-IT		Docume 👻
- 1		08	0013	9574	6/1/2007	70527	DIGI-IT		Barcode
- 1		08	0014	600203	6/3/2006	70527	DIGI-IT		Datum
		08	0014	600203	6/3/2007	70527	DIGI-IT		
		08	0014	600205	6/2/2007	70528	Bergmann Software Ring		
. 1		08	0014	600205	6/2/2007	70528	Bergmann Software Ring		
<mark>ц</mark>		08	0015	9516	6/3/2007	70528	Bergmann Software Ring		
1		08	0015	9516	6/3/2007	70528	Bergmann Software Ring		Show already merged host data
		08	0015	9579	7/8/2006	70527	DIGI-IT		
		08	0015	9579	6/8/2007	70527	DIGI-IT		New Search
		08	0017	9524	6/9/2007	70528	Bergmann Software Ring		
		08	0017	9528	6/7/2007	70528	Bergmann Software Ring		Save changes
		08	0017	9586	7/18/2006	70527	DIGI-IT		
		08	0017	9591	7/14/2006	70527	DIGI-IT		Refresh
		08	0019	9539	6/11/2007	70528	Bergmann Software Ring		
		08	0019	9539	6/11/2007	70528	Bergmann Software Ring		
		08	0019	9590	7/22/2006	70527	DIGI-IT	Ξ	
	•	08	0019	9590	7/22/2006	70527	DIGI-IT		
								-	Quit
.06 n	ecords found	_							

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.

Select all		Strg+A	
Create new host data record		Strg+N	
Copy host data record		Alt+C	
View document in Retrieval	2	Strg+G	
Columns		Strg+F3	
Merging		Strg+M	

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



IV. Administration Error lists

Create host data	_			x
Company	08	HABEL GmbH & (	Co. KG NI 👻	
Document type	0013	Supplier Offer	•	
Document No.	9574		*	0
Document date	01/07/2	2006	=	
Order No.	600203			
External Docum	334876	1589		
Order No.(intern	225615		<i>. P</i>	
Delivery Note No.				
Invoice No.				
Customer/Supp	70527		, P	
Name	DIGHT		2	
PLZ	7206 M	к	, P	
Location	Winters	wijk	, P	
LKZ	NL		, P	
Article No.	10099		, P	
Article name	Plasmor	n G24-UDO-Jukeb	ox 🔎	
Serial No.				
Subject				
Info				
	C	reate record	Cancel	

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 dcuments 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).

Ľ	Drag column to soft in here.							
1	Fehler	Firm	Beleg	Belegnummer				
٠	0	07	0012	500018				
٠	0	07	0012	500018				



IV. Administration HABEL CONTROL

### **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.



Vollständigkeit:	kontrolle	
Datei Info		
48.0		
Datenbank:	General 💌	Start
Firma: Filiale: Belegart: Unterbelegart:	(01) HABEL GmbH & Co. KG (0005) SLS Order confirmation (V101) GesellschVertrag ▼	
Zeitraum: BelD	· · · · · · · · · · · · · · · · · · ·	
Belegkreis: Barc	ode 💌 Maske	e:
Schritt: 1	_ ▼	
	usammenfassen? 📈 Neu selektieren	Beenden

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.



IV. Administration HABEL CONTROL

Zeitraum: BelDt 💌 🛄	
Belegkreis: Barcode 💌 202130	202150 Maske:
Schritt: 🚺 🜩	
Zusammenfassen?	

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)				
🥹 Viewer	De Viewer De Viewer				
Datei	Datei				
Datum: 21.04.2011 - 16:17:27 Benutzer: mike.schmitt \ 1.01.05.0016 Selektion: Firma : (01) HBMEL GabH & Co. KG Belegart :(0005) VK Auftragsbestätigung Schritt :1 Zeitraum :(BelDt) Belegkreis :202130 - 202150 (Barcode)	Datum: 21.06.2011 - 16:19:12         Benutzer: mike.schmitt \ 1.01.05.0016           Selektion: File         :(0)         BABEI Gobh & Co. NG           Belegart         :(0005) VK Auftragsbestätigung           Schritt         :1           Zeitrami         :				
Selektion ergab keine Datensätze! Fehler: Von: 202131 Bis: 202151 Anzahl: 21	Selektion ergeb keine Detensätze! Fehler: 202131 Fehler: 202133 Fehler: 202133 Fehler: 202134 Fehler: 202135 Fehler: 202135 Fehler: 202137 Fehler: 202137 Fehler: 202138				



IV. Administration HABEL CONTROL

3. Result	
🈂 Viewer	
Datei	
Datum: 21.06.2011 - 16:20:35       Benutzer: mike.schmitt \ 1.01.05.0016         Selektion: Firma       :(01)       HABEL GmbH & Co. KG         Belegart       :(0005)       VK Auftragsbestätigung         Schritt       :1         Zeitraum       : (BelDt)         Belegkreis       :202130 - 202150 (Barcode)	1
Selektion ergab keine Datensätze! Fehler: Von: 202131 Bis: 202151 Anzahl: 21	2
	Ŧ
Drucke	en <u>B</u> eenden

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. <u>Incidentally</u>: 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.



IV. Administration HABEL CONTROL

## 4. Menu bar – Symbols

🤪 Vo	Vollständigkeitskontro						
Datei	Info	ŭ					
	Start						
	Protokoll						
	Beenden						

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

.....

Start <sup>3</sup>

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 **4** Quits the program.



IV. Administration HABEL AUTOJOB

### 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 outputed 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.





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.



### IV. Administration HABEL AUTOJOB

HABEL - Job control [Standard]						
File Help						
]• <mark>Jobs</mark>	Name	Job type	Status	Start	Ρ	Last run
<ul> <li>NachtJob</li> <li>PDF_IDX-Archivierung</li> <li>ABAS-Archivierung</li> <li>Volltext-Datenbank</li> <li>Export Eingangsrechnungen</li> <li>Drag &amp; Drop</li> <li>Vertragsmanagement</li> <li>Konvertierung Datcold-&gt;TIFF</li> <li>Formblattgenerator</li> <li>Explorer Import</li> <li>Personalmanagement</li> <li>DOKUEditor</li> <li>Import Micros Fidelio</li> <li>Automatische Belegerkennun;</li> <li>COLD-Beispiele</li> </ul>	NachUob PDF_IDX-Archivierung ABAS-Archivierung Volltext-Datenbank Export Eingangsrechnungen Drag & Drop Vertragsmanagement Konvertierung Datcold->TIFF Formblattgenerator Explorer Import Personalmanagement DOKUEditor Import Micros Fidelio Automatische Belegerkennung COLD-Beispiele	Daily Manual Start Manual Start Manual Start Manual Manual Manual Start Manual Start Manual	Inactive Inactive Ready Inactive Ready Ready Ready Ready Ready Ready Ready Ready Ready Ready Ready Ready	22:00 c:\programme RUNDD.JOB lauf.los form.blatt OCR.START	NNNLLIINNN	12.04.2010 12:12:12 12.04.2010 12:12:12 12.04.2010 12:12:12 16.02.2011 09:29:14 12.04.2010 12:12:12 12.04.2010 12:12:12 12.04.2010 12:12:12 12.04.2010 12:12:12 23.04.2010 12:12:12 23.04.2010 12:12:12 23.04.2010 11:01:53 16.02.2011 09:27:51 02.05.2011 08:22:52 04.05.2011 08:10:15
<u>R</u> eset <u>S</u> tart	<u>C</u> ancel all jobs					<u>E</u> xit

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.

R HABEL - Job control [Standard]							×
File Help							
🖃 Jobs	Name	Status	Program	Parameter	Last run		Result
<ul> <li>Nachtlob</li> <li>PDF_IDX:Archivierung</li> <li>ABAS:Archivierung</li> <li>Volltext:Datenbank</li> <li>Export Eingangsrechnungen</li> <li>Drag &amp; Drop</li> <li>Vertragsmanagement</li> <li>Konvertierung Datcold-&gt;TIFF</li> <li>Formblattgenerator</li> <li>Explorer Import</li> <li>Personalmanagement</li> <li>DOKUE ditor</li> <li>Import Micros Fidelio</li> <li>Automatische Belegerkennum</li> <li>COLD-Beispiele</li> </ul>	Prüfen Kapazität Holen Daten von System Fibu Verarbeitung HOST-Daten Erzeugen Mischdaten aus DB Nachträglich Abmischen Abmischen Fehlerprotokoll Reorganisation System Füllen Container Schreiben auf UDD	Active Inact Inact Inact Inact Inact Inact Inact	HPHAB829.EXE DATHOLEN.BAT HPHAB030.EXE HPHAB030.EXE HPHAB070.EXE HPHAB075.EXE HPTDLERR.EXE HCHAB000.BAT HPHAB808.EXE HPHAB806.EXE	/cfg=10 /cfg=01	12.04.2010 12.04.2010 12.04.2010 12.04.2010 12.04.2010 12.04.2010 12.04.2010 12.04.2010 12.04.2010 12.04.2010	<b>12:12:13</b> 12:12:13 12:12:14 12:12:15 12:12:16 12:12:17 12:12:19 12:12:20 12:12:21 12:12:22	ОК ОК ОК ОК ОК ОК ОК
<u>R</u> eset <u>S</u> tart	Beset         Start         Cancel all jobs						
Copyright © 1996-2011 by HABEL Gm	Copyright © 1996-2011 by HABEL GmbH & Co. KG, 78604 Riethei Active jobs: [0] Tuesday 06/09/2011 13:59:16						



### IV. Administration HABEL AUTOJOB

11

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

<u>R</u> eset	<u>S</u> tart	<u>C</u> ancel all jobs			<u>E</u> xit	
Copyright © 199	6-2011 by HABEI	L GmbH & Co. KG, 78604 Riet	hei Active jobs: [0]	Tuesday 06/09/2011	14:00:25	

In order to reset canceled jobs for the next run, you can press the *Reset* button. <u>Note</u>: 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".

4



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

<u>R</u> eset	<u>S</u> top	<u>C</u> ancel all jobs	

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.



IV. Administration **HABEL AUTOJOB** 

3. Menu bar .....



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

🔍 Settings	
Notification	
☐ Print log ☐ Log as e-mail	Only notify in case of error
☐ 100 Nachtjob ☐ 950 Habel	nachtjob@habel.de software@habel.de
Host: [192.168.0.120] Po	nt: [8025]
Help	

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). А connection to the mail server is the requirement for sending e-mails. This connection can be checked via a click on the host/port.

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.

R HABEL - Job control [Standard]	design of the local division of the local di	-					- • ×
File Help							
E- Jobs	Name	Job type		Status	Start	F	<sup>o</sup> Lastrun
NachtJob	NachUob	Daily		<b>n</b> J.	22.00		06/09/2011 14:00:45
PDF_IDX-Archivierung	PDF_IDX-Archivierung	Manual	5	New job		F2	12.04.2010 12:12:12
ABAS-Archivierung	ABAS-Archivierung	Start		Delete job		E3	12.04.2010 12:12:12
Volltext-Datenbank	Volltext-Datenbank	Manual		Delete Job		15	16.02.2011 09:29:14
- Export Eingangsrechnungen	Export Eingangsrechnungen	Manual		Change job		F4	12.04.2010 12:12:12
Drag & Drop	Drag & Drop	Start					12.04.2010 12:12:12
	Vertragsmanagement	Charl		Deactivate		F5	12.04.2010 12:12:12
Konvertierung Datcold->TIFE	Formblattgenerator	Start					12 04 2010 12:12:12
	Explorer Import	Manual		Notification	mail to		23.04.2010 11:01:53
- Explorer Import	Personalmanagement	Manual		Ready			16.02.2011 09:27:51
	DOKUEditor	Manual		Ready			
BOXUE P	Import Micros Fidelio	Manual		Readv		1	N 02.05.2011 08:22:52

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.



IV. Administration HABEL AUTOJOB

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

💮 Log		-		x				
Print job	Print job log							
Job No.	Date/time		Status					
47	06.09.2011	14:00	[Error]	<b>•</b>				
46	06.05.2011	13:58	[OK]					
45	04.05.2011	08:13	[OK]					
44	02.05.2011	08:22	[OK]					
43	02.05.2011	08:22	[Error]					
42	02.05.2011	08:21	[Error]					
41	02.05.2011	08:18	[OK]	-				
40	02.05.2011	08:18	[OK]	=				
39	01.05.2011	18:06	[Error]					
38	01.05.2011	18:04	[Error]					
37	01.05.2011	18:02	[Error]					
36	01.05.2011	17:50	[OK]					
35	01.05.2011	17:50	[Error]					
34	01.05.2011	17:40	[Error]					
33	21.04.2011	10:03	[OK]					
32	21.04.2011	10:02	[OK]					
31	16.02.2011	09:28	[OK]					
30	16.02.2011	09:28	[OK]					
29	16.02.2011	09:27	[OK]					
28	16.02.2011	09:26	[OK]					
27	16.02.2011	09:25	[OK]					
26	01.08.2012	09:22	[OK]					
25	29.03.2011	09:20	[OK]					
24	29.03.2011	09:19	[OK]					
23	28.03.2011	09:17	[OK]	-				
, 12								
<u>P</u> rint	<u>D</u> isplay	<u>C</u> ontinu	e <u>E</u> x	it				

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.

Reg HABEL - Job control [Standard]		-		-		×
File Help						
🖃 Jobs 🗧	Name	Status	Program	Parameter	Lastrun	Result
	Prüfen Kapazität	Active	HPHAB829.EXE		06/09/2011 14:00:47	Error
	Verarbeitung HOST-Daten	Inact	HPHAB030.EXE	/cfg=10	12.04.2010 12:12:13	OK
- Volltext-Datenbank	Verarbeitung SPOOL-Daten	Inact	HPHAB030.EXE	/cfg=01	12.04.2010 12:12:15	OK
	LErzeugen Mischdaten aus DB	Inact	HPHAB370.EXE	hanna	12.04.2010 12:12:16	OK QK



IV. Administration HABEL AUTOJOB

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.

R Show log	
	<u>^</u>
JOD NO. 42	
02.05.2011 08:21 -> Jobstart Import Micros Fidelio	E
02.05.2011 08:21 Job wurde manuell gestartet.	
02.05.2011 08:21 00 11111001101111112011101101101101111212111111	
02.05.2011 08:21 01 1111100101000000011B1000000120111100000000	
02.05.2011 08:21 02 1111100101000000011B1000000120111100000000	
02.05.2011 08:21 03 1111100101000000011B1000000120111100000000	
02.05.2011 08:21 04 1111100101000000011B1000000120111100000000	
02.05.2011 08:21 05 1111100101000000011B1000000120111100000000	
02.05.2011 08:21 06 1111100101000000011B1000000120111100000000	
02.05.2011 08:21 07 1111100101000000011B1000000120111100000000	
02.05.2011 08:21 08 1111100101000000011B1000000120111100000000	
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. Fidelic)	
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 gefun	den.
02.05.2011 08:21 Erste Datei: TA_1Seite_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</beldat>	in DB gefun
02.05.2011 08:21 .! Fehler in Datei(TA_Außenstand_22012010_1901.pdf): Feld <beldat> nic</beldat>	ht in DB gef
02.05.2011 08:21 .! Fehler in Datei(TA_Offene_Salden_22012010_1901.pdf): Feld <beldat></beldat>	nicht in DB
02.05.2011 08:21 .! Fehler in Datei(TA_Offene_Salden,_nur_Vorausbuchungen_22012010_1901	.pdf): Feld 👻
<	Þ
	Evit
	<u> </u>

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.



### IV. Administration HABEL AUTOJOB

### 4. Pull-down menu in the Autojob

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

Help							
lobs	Name	Job type	Status	Start	P	Last run	
NachUob	NachtJob	Daily	Readu	22:00	N	06/09/2011	14:00:4
PDF_IDX-Archivierung	PDF_IDX-Archivierung	Manual	New job	F2	N	12.04.2010	12:12:12
ABAS-Archivierung	ABAS-Archivierung	Start	Delete inte		. N	12.04.2010	12:12:12
Volltext-Datenbank	Volltext-Datenbank	Manual	Delete Job	r5	N	16.02.2011	09:29:14
- Export Eingangsrechnungen	Export Eingangsrechnungen	Chart	Change job	F4	N	12.04.2010	12:12:12
Drag & Drop	Vertragsmanagement	Manual			1	12.04.2010	12.12.12
Vertragsmanagement	Konvertierung Datcold->TIFF	Start	Deactivate	F5	Ĵ	06.05.2011	13:59:51
Konvertierung Datcold->TIFF	Formblattgenerator	Start	AL		J	12.04.2010	12:12:12
Formblattgenerator	Explorer Import	Manual	Notification mail to		J	23.04.2010	11:01:53
Explorer Import	Personalmanagement	Manual	Ready		J	16.02.2011	09:27:51
Personalmanagement	DOKUEditor	Manual	Ready		J		
DOKUEditor	Import Micros Fidelio	Manual	Ready		N	02.05.2011	08:22:52
Import Micros Fidelio	Automatische Belegerkennung	Start	неаду	UCH.START	N N	04.05.2011	08:10:15

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:

Create job	-		×
Name:	New job		
Status:	Ready	•	
Print log?	◄		
Start type:		▼	
Start time:	_:		
Start day:		T	
Call file:			
End time:	_:		
Minuts:			
□Interval st.	art	C Workdays	
		<u>0</u> K	

### 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.



IV. Administration HABEL AUTOJOB

### 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	Job is executed on every workday	Start time
workday		
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.

File Help								
⊡- Jobs	Name		Status	Program	Parameter	Last run	Result	
NachtJob PDF_IDX-Archivierung	Prüfen Holen	New action	F2	HPHAB829.EXE DATHOLEN.BAT		06/09/2011 14:00:47 12:04:2010 12:12:13	Error OK	
	Verarb Verarb	Delete action	F3	HPHAB030.EXE HPHAB030.EXE HPHAB370.EXE HPHAB075.EXE	/cfg=10 /cfg=01	12.04.2010 12:12:14 12.04.2010 12:12:15 12.04.2010 12:12:16 12.04.2010 12:12:17 12.04.2010 12:12:19 12.04.2010 12:12:19		
Export Eingangsrechnungen	Erzeu <u>c</u> Nachti	Change action						
Drag & Drop Vertragsmanagement	Abmise	Deactivate	F5	HPTDLERR.EXE				
Konvertierung Datcold->TIFF	Füllen	Sequence	<b>F6</b>	HPHAB808.EXE		12.04.2010 12:12:20	ок 🍃	
Formblattgenerator Explorer Import	Schreiben a	uf UDO	Inact	HPHAB806.EXE		12.04.2010 12:12:22	OK	
Personalmanagement DOKUEditor							- 2	
Import Micros Fidelio	h	And pro-	·\		$\sim \sim \sim$	and the providence	$\sim$	



IV. Administration HABEL AUTOJOB

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.

Create task	
Name:	Transfer TIF + IDX
Status:	Active
Program:	HPHAB030.EXE
Parameter:	/cfg=11
	<u> </u>


**IV. Administration** Analysis programs

#### 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?

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Search Hit list View	In	formation	Drag a column header here to group by that column
Show Information Print Clear		iave - O Forward iend - O Backward More Delete history	Aktion         Dateinr         Sei         Wh         Datum         Zeit         Benutzer           Export         2400000         0         1         12/13/200         09.58           Export         2400000         0         1         12/13/200         09.58           Anzeigen         2400000         0         1         12/13/200         09.58           Anzeigen         2400000         0         1         3/9/2007         09.14           Anzeigen         2400000         0         1         3/9/2007         09.57
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efamalica ag Parr Anas Viewa		Create post basket entry roice	Another program is available
Linengapas (Ka Kalin Gentary	1	Show log entries ler confirma Show combined operations roice 10012 Supplier Enquiry	for comprehensive analyses, HABEL STATISTICS.
Auftraptiverstrigung Nr. 220115		0014 Supplier Order 0012 Supplier Enquiry	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





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# 2. Program structure

HABEL Statistik						
Datei Extras						
Gefundene Vorgänge: O	Gefundene S	Seiten: O		Datensätze <u>o</u>	gesamt: O	
🔲 Nach Anzahl sortieren						
DB	Datei-, Seite-, WormNr	Firma	Belegart	Anwender	Arbeitsplatz	
						-
					1	I
<u>R</u> echerche Suche	Historie Suche			Postkorb Suche		<u>B</u> eenden
Copyright 1996-2006 by HABEL Gr	mbH & Co. KG					

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

#### Example with data:

HABEL Statistik							
vatei Extras							
Gefundene Vorgäng	je: 161 Ge	fundene	e Seiten m	ind.: 161	Datensätz	e gesamt: k.A.	
🔲 Nach Anzahl sortierer	n						
							-
DB	Datei-, Seite-, WormNr	Firma	Belegart	Anwender	Arbeitsplatz	Erfassungsdatum	
HDHBL030 Allgeme:	89700161 0	06	02		897	2007.01.22	
HDHBL030 Allgeme:	89700160 0	06	02		897	2007.01.22	
HDHBL030 Allgeme:	89700159 0	06	02		897	2007.01.22	
HDHBL030 Allgeme:	89700158 0	06	02		897	2007.01.22	
HDHBL030 Allgeme:	89700157 0	06	02		897	2007.01.22	
HDHBL030 Allgemer	89700156 0	06	02		897	2007 01 22	_
<u>R</u> echerche Suche	Historie Suche				Postkorb Suc	he	<u>B</u> eenden
yright 1996-2006 by HA	BEL GmbH & Co. KG						



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# 3. Analyses 3. Analyses Image: Habel Statistik Datei Extras Recherche Suche Postkorb Suche Historie Suche Beenden DB

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.

Recherche Suche	
Suchschema: Schema laden Schema speichern Schema löschen	Datenbankfeld: Suchbegriff:
Datumssuche: Datumsfeld:	Datenbankfeld:     Suchbegriff:       ✓     Auftragsnummer (inte ▼
Datenbankfeld: Suchbegriff:	Datenbankfeld: Suchbegrift:
Image: Ku/LiNr     Image: Constraint of the second se	Datenbankfeld: Suchbegriff:
Image: Name     Image: Control of the second s	Datenbankfeld: Suchbegriff:
Fileextension     Weniger Datenbankfelder <	Datenbankfeld: Suchbegriff:
Zu durchsuchende Datenbank Verfügbare Datenbank HDHBL030 Allgemein HDHBL031 Personal HDHBL032 Spedition	Datenbankfeld: Suchbegriff:
Entfernen	Datenbankfeld: Suchbegriff:
☐ Nullposten anzeigen <u>S</u> uche starten	

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.



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#### Search pattern

Suchschema:			
erfasst im Januar 2007 💌	Schema laden	Schema speichern	Schema löschen
erfasst im Januar 2007 N			
- A			

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: ??.??.2007	🗖 bis	Datumsfeld: Belegdatum
•	Datenbankfeld: Ku/Li-Nr	Suchbegriff:	[
	Datenbankfeld: Name	Suchbegriff:	Verknüpfung Suchfelder: C Oder I Und
•	Datenbankfeld: Fileextension	Suchbegriff:	Mehr Datenbankfelder >>

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		Verfügbare Datenbank
HDHBL030 Allgemein		HDHBL031 Personal
	Hinzufügen	HDHBL032 Spedition
	Entfernen	
		,

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



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#### 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 $\rightarrow$ 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").

Nullposten anzeigen Suche starten	
NE	

#### 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?



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# 5. Utilization of results

HABEL Sta	tistik								
Datei Extras									
Gefundene Vorgänge: 247 Gefundene Seiten mind.: 247 Datensätze gesamt: 2878									
Nach Anza	ahl sortieren								
								<b>^</b>	
DB	Name	Belegart	Firma	Belegdatum	Ku/Li-Nr	Fileextension	Benutzername	Auftragsnum	
HDHBL030	A Digi-IT	02	06	2007.01.22	70527				
HDHBL030	A Digi-IT	02	06	2007.01.22	70527				
HDHBL030	A Digi-IT	02	06	2007.01.22	70527				
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Recherche Suche         Historie Suche         Postkorb Suche         Beenden									
opyright 1996-2	006 by HABEL	. GmbH & Co	. KG						

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.

HABEL Statistik				
Datei Extras				
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🔲 Nach Anzahl sortieren				
Belegart AName				
DB Firma E	3elegdatum Ku/Li-Nr	Fileextension	Benutzername	Auftragsnummer
+ Belegart : 02 (COUNT=181)	Anzahl:	181 (COUNT=181)		
+ Belegart : 05 (COUNT=18)	Anzahl:	18 (COUNT=18)		
+ Belegart : 07 (COUNT=24)	Anzahl:	24 (COUNT=24)		
+ Belegart : 09 (COUNT=24)	Anzahl:	24 (COUNT=24)		
	uche	<u>P</u> ostkorb :	Suche	Beenden
Copyright 1996-2006 by HABEL GmbH & Co. K	G			/



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#### **Command options**

Dptionen 🛛 🛛 🔀						
Suchmethode für Recherche Datenbank AIM suche Spezialsuche (Empfohlen)						
Maximal zu dursuchende Datensätze für Auflistung der Suchbegriffe						
Gibt die Anzahl der Datensätze an, die maximal dursucht werden dürfen, um eine Liste der zur verfügung stehenden Suchbegriffe zu erstellen. Diese Liste wird dann erstellt wenn im Suchdialog ein Datenbankfeld ausgewählt wird. 0 bedeutet kein limit. Dieser Wert hat nichts mit der eigentlichen Suche zu tun.						
ОК						
Dptionen						
Dptionen Suchmethode für Recherche Datenbank C AIM suche Spezialsuche (Empfohlen)						
Dptionen       Image: Suchmethode für Recherche Datenbank         Image: Suchar Auflistung       Image: Suchar Auflistung         Image: Suchar Auflistung       Image: Suchar Auflistung         Image: Maximal zu dursuchende Datensätze für Auflistung der Suchbegriffe       Image: Suchar Auflistung         Image: Suchar Auflistung       Image: Suchar Auflistung         Image: Suchar Auflistung       Image: Suchar Auflistung         Image: Suchar Auflistung       Image: Suchar Auflistung						
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#### **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.

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IV. Administration Analysis programs

#### Document-based volume statistics

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

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	А		В	С		D	E
1	Belegart Nurr	Belegart Be	zeichnung	Anzahl			
2	2	(COUNT=1	81)	181 (COUNT	=181)		
3	5	(COUNT=1	8)	18 (COUNT=	18)		5
4	7	(COUNT=2	4)	24 (COUNT=	24)		5
5	9	(COUNT=2	4)	24 (COUNT=	24)		5
6							
7			BEL Statistik				1
8		Datei	Extras				
9							
10		Gel	undene Vorga	änge: 247	(	Gefundene So	eiten mind.: 24.
11			ach Anzahl sorti	eren			3
12							
13		Bel	egart 🛆				
14		DB		Name E	ima	Belendatum	Ku/Li
15		+1 B	elegart : O	2 (COUNT=18	1)	13	Anzahl: 18
16			elegart : O	5 (COUNT=18	 \		Anzahl: 18
17			elegart : 0	7 (COUNT=24	، ۱		Angehl:
18			elegart : 0	9 (COUNT-24	/		Anzahl.
19		<u> </u>	elegart : U	9 (COONI=24	/		Anzani: 24
20							
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#### Enhanced

Exportieren	
Feld Firma	
zusammenfassen, dann	Exportieren

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.



IV. Administration HABEL SEARCH and REPLACE

### 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





IV. Administration HABEL SEARCH and REPLACE

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🖪 HABEL -	Suchen und	Ersetzen						
<b>5</b> Anzeigen	5 Export	<b>Ø</b> Ändern	X Löschen					stop
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HDHBL030 (	Allgemein) - S	QL	•					
Filter								
DateiNr			<u>^</u>					
SeiteNr								
WormNr								
SCCOKZ								
Formivir								
Filiale								
BelArt								
UBelArt								
Barcode								
BelDt								
AngebNr								
BestNr								
FBelNr								
ServNr								
VertrNr			✓ < □□					>

Various commands are available via symbols in the top section



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.



.....

IV. Administration HABEL SEARCH and REPLACE

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.

<ul> <li>Alphabetisch anordnen</li> </ul>	
Alle leeren	η

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.

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Anzeigen	Export	Andern	Loschen							Stop
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HDHBL030 (	Allgemeih) - S(	QL	-							
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Info			^							
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KuLiNam	Feinmechani	k Müller								
KuLiNr										
Ladeland										
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LadeNr										
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LadePLZ										
LfsDa										
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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).

$\checkmark$ Alphabetisch anordnen					
Alle leeren					



IV. Administration HABEL SEARCH and REPLACE

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

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<b>a</b> nzeigen	<b>ح</b> Export	<b>Ø</b> Ändern	X Löschen					Stop
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HDHBL030 (A	Allgemein) - SQ	ΣL	-	89500210	0	1 02	26	8241( 🔨
Filter				89500368	0	1 02	26	86692 📃
Info	Allgemein		<u>~</u>	89500566	0	1 02	26	8208
Konto				89500592	0	1 02	26	8880(
KontoBez				89500792	0	1 02	26	8148
KstBez				89500960	0	1 02	26	84124
KstNr				89501094	0	1 02	26	89702
KuLiKurz	Feinmechanil	k Müller		89501306	0	1 02	26	8404(
KuLiNam	Feinmechanil	k Müller		89501427	0	1 02	26	84844
KuLiNr	33333			89501461	0	1 02	26	8346(
Ladeland				89501477	0	1 02	26	84704
Ladename			_	89501531	0	1 02	26	89159
LadeNr				89501593	0	1 02	26	8207
LadeOrt				89501753	0	1 02	26	80434
LadePLZ				89501755	0	1 02	26	8074
LfsDa				89501803	0	1 02	26	87332
LfsNr				89501808	0	1 02	26	8304( 🗸
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208 Datensät	ze geladen							.::

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GsNr <sup>Kg</sup>				- 1		
AnfrNr				÷		
KuLiNr	33333			- 2		
KuLiNam	Feinmechar	nik Müller		<		
PLZ	77555			1		
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LKZ	D			-5		
Betreuer				1		
FilNr						
manage and the	the state of the state					

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.

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IV. Administration HABEL SEARCH and REPLACE

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.

Datensätze ä	ndern				
Felder Ken	nzeichen				
Feld änderr	1				
Feld:		KuLiNam (Name)			
Neue	er Wert:	Feinmechanik Müller GmbH			
Ihre Auswahl wird für alle Datensätze, auf die der momentan gewählte Filter zutrifft, übernommen.					
		Werte ändern Abbrechen			

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. <u>Note</u>: <u>Not</u> 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.