

PROXESS 10

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DOCUMENTATION PROXESS WEB CLIENT

Status: PROXESS 10

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Conventions in this documentation

A note for female users:


For better legibility, we are omitting the explicitly separate mention of male and female users in this documentation. However, we want to expressly point out that we always refer to both women and men in this documentation.

Highlights in the text


Highlights are used in this documentation as follows:

Bold	Refers to menu commands, buttons, field names, options and program groups. Examples: the New command, in the Name field
"Quotation marks"	Refer to menu titles, folder names and dialog fields. Examples: the "User" menu, the "Smartcards" folder, the "Set password" dialog field
UPPERCASE LETTERS	Are reserved for the representation of keys. Examples: RETURN key, ALT key
(Brackets)	Show that a placeholder symbol is meant. Examples: (%) () during the PROXESS search

Tips

	Show you particularly convenient options for the operation or useful additional information. Tips are always represented as they are in this paragraph.
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Warnings

	Are displayed for actions that could result in significantly more work or might even lead to data loss or other material damages. Warnings are shown by this symbol: You should read the warnings very carefully before you continue working.
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About the PROXESS Web Client

Welcome to the PROXESS Web Client online documentation.

PROXESS Web Client is the web client for PROXESS. You can use PROXESS Web Client with all conventional browsers and on mobile end devices.

PROXESS Web Client offers a range of innovative search functions for your documents archived in PROXESS:

[Web Client search-word completion](#) similar to Google

[Keyword search](#) with individually adjustable search masks and hitlist

[Path search](#) based on a hierarchic directory structure

[Quick search](#) with intelligent filter function to narrow down the hitlist

There are video tutorials for many help topics. You can find these videos in this online guide or at this link: [Video tutorials](#)

The home page

You reach the home page after accessing the PROXESS Web Client and—depending on the setting—after you log in. You can also return to the home page any time via the “**PROXESS**” menu item in the main menu.



Fig.: The home page

You can enter a keyword directly in the **Quick search** field and search for it.

You will also find a quick menu there with the following functions:

Keyword search: This takes you to a search mask with search fields (see topic: [Keyword search](#)).

Path search: This takes you to a hierarchical path search, which you can “click through” (see topic: [Path search](#)).

New document: This takes you to the general creation of new documents (see topic: [Create new document](#)).

Standard quick tray (here: Invoices): This takes you to quick archiving with a pre-configured tray scenario (see topic: [Create a document with the quick tray](#))

Info

Select the question mark symbol at the bottom right of your screen to access the Help menu.

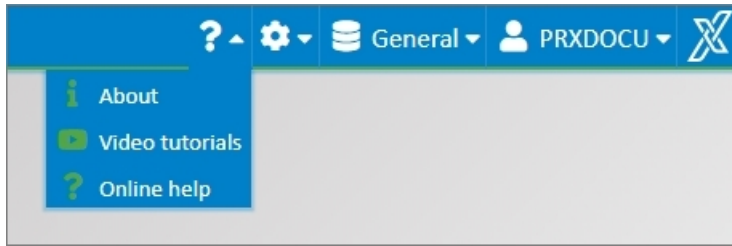


Fig.: Online help menu

Use the **Info** command to call up the version information for the current version of your PROXESS Web Client program. Please have this information on hand when you contact your PROXESS service.

Online help

Select the gears symbol at the bottom right of your screen to access the settings menu.

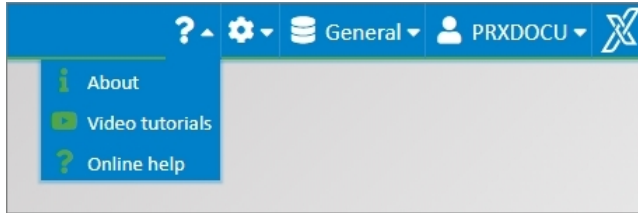


Fig.: Online help menu

Use the **Online help** command to call up the online documentation that you are currently reading.

How can I search online help?

You can find the table of contents with all the help topics for the documentation in the “Contents” tab.

When you enter a search term in the “Index” tab, you will get a list of the help topics that the author linked to the term.

In the “Search” tab, you can perform a full-text search for the search term across the entire contents of all help topics.

Video tutorials

Select the question mark symbol at the bottom right of your screen to access the Help menu.

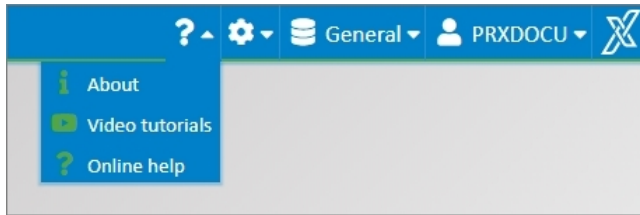


Fig.: Online help menu

With the **Video tutorials** command, you can access the video tutorials. Here you will find videos on various topics.

Login

You can start the PROXESS Web Client in any browser. You will receive the link from your administrator and can save it in your browser as usual.

The login dialog appears after the program access.

Fig.: PROXESS login dialog

1	Authentication	<p>Windows</p> <p>The login is performed with your main Windows login information (from the Windows Active Directory). It is entered automatically. In this dialog, it is not possible to change the displayed Windows login data.</p> <p>DMS</p> <p>If you use the “DMS” authentication option, you enter your user name and password yourself. This login version is appropriate e.g. if you access archives with sensitive documents (high-security databases).</p>
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2	Stay logged in?	If this option is activated, you do not have to log in again next time you start PROXESS Web Client. The information from your last login is automatically used again.
3	Advanced settings	If you are registering on a device for the first time, go to Advanced settings to specify which server you want to connect to and which protocol should be used. These settings will be saved for the next login. You generally get this information from your system administrator.
4	Login	Select “Log in” to log in.

[Go to video tutorial](#)

Logout

You can log out in the user menu:



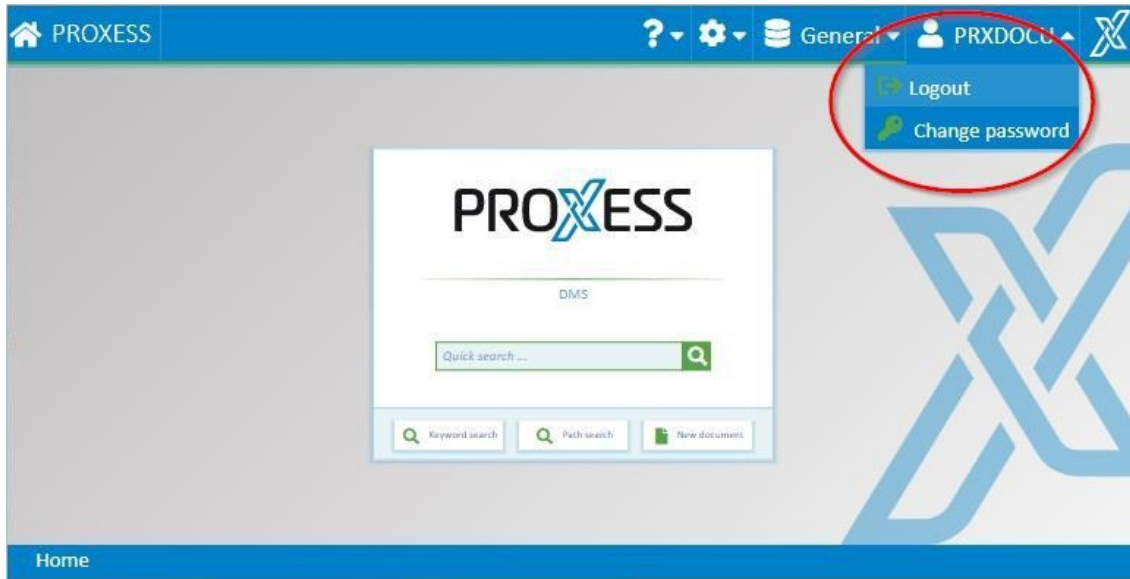
Fig.: PROXESS user menu

If you close the browser window without logging out, you will continue to be logged into the system. After 30 minutes, you will be automatically logged out of the system.

[Go to video tutorial](#)

Change password

You can change your PROXESS password in the user menu.



This function is only available to users who log in with the “DMS” authentication option. Windows login data cannot be changed here (see [Login](#)).

Fig.: “Change password” dialog

As a user, you can change your own password. It is also possible that your password has expired and the system asks you to change it within 14 days.



If this password change is not performed within the specified time period, the user account is blocked. Then the new account activation has to be performed by an administrator.

The following rules apply to the assignment of a password (**password rules**):

- The password field may not be empty.
- The password must have at least 8 characters.
- The password may not be identical to the user name.
- The password must contain at least one number or a special character. All symbols aside from a–z, A–Z and 0–9 are considered special characters.
- The password must contain at least one lowercase and one uppercase letter.

A green check mark next to the password field indicates that all conditions have been met and the password is valid.

Repeat the password entry in the “Confirmation” field and confirm the new password with **OK**.

[Go to video tutorial](#)

Settings (user)

You can access the user settings via the gears symbol at the bottom right of your screen:

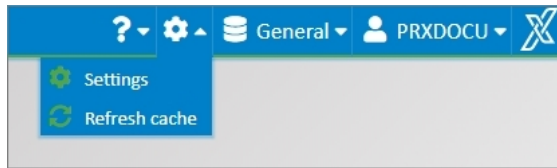


Fig.: User settings dialog

Select **Settings**.

The following user settings are possible:

Placeholder for the search:

without (=exact search)	<p>The entered character sequence must coincide precisely with the field value.</p> <p>Example: A search for "PROXESS" will find no documents whose field content is "PROXESS GmbH".</p>
Placeholder at the end	<p>A placeholder is automatically added to the end of the entered search value.</p> <p>Example: A search for "specialist" finds all documents with the field content "specialist" and documents with the field content "specialists".</p>
Placeholder at the beginning and end	<p>A placeholder is automatically added to the beginning and end of the entered search value.</p> <p>Example: A search for "specialist" finds all documents with the field content "specialist" and documents with the field content "specialists" as well as documents with the field content "document management specialists".</p>

Standard search mask for the keyword search:

Last used	When the keyword search is called up again, the most recently used search mask is shown.
None	When the keyword search is called up, no individual search mask is shown. All fields of the archive are shown. Since this could be very many fields, this setting is only recommended to a limited extent.
Individual search masks	If the administrator already defined "global searches" or the user defined "personal searches", these can be selected as the starting search mask.

Standard tray area for archiving:

Last used	When this is called up again, the most recently used tray area is used for archiving.
None	The function is deactivated.
Standard	When this is called up again, the standard tray area is used for archiving.

Automatically open a document:

Documentation PROXESS Web Client

Never	After the search, only the hitlist is shown. Documents are never opened.
First	After the search, the hitlist is shown and the first document is opened automatically.
If only one entry	If the hitlist contains only one entry, this document is opened automatically. If there are multiple hits, no document is opened automatically.

Standard document zoom:

Fit to width	The document is fit to the width.
Fit to height	The document is fit to the height.
Last used	The document is opened with the most recently used zoom settings.

Change color scheme:

Light-green	The "Light-green" color scheme is used.
Light-blue	The "Light-blue" color scheme is used.
Dark-blue	The "Dark-blue" color scheme is used.
Dark-orange	The "Dark-orange" color scheme is used.

Bcc recipients when sending an email:

Recipients	When you send an email, a copy is sent to these addresses. This address is not visible to the other recipients.
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[Go to video tutorial](#)

Refresh cache

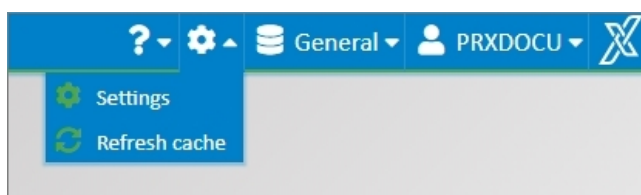


Fig.: Settings menu

Select the gears symbol at the bottom right of your screen to access the settings menu.

The “**Refresh cache**” command updates all of your system’s metadata to the current state during an ongoing session. Metadata may be new or edited fields, newly set-up search forms in the keyword search, selection lists, etc. In general, your system administrator will ask you to refresh the cache if he or she has made changes to the system.

When you log in to the PROXESS Web Client or change databases, all of your system’s metadata are always loaded in an updated form automatically.

Change database

You can find the “Database” menu below. Each database is a self-contained archive. A database can represent e.g. a client or a particular sub-archive at the company (such as a personnel archive).

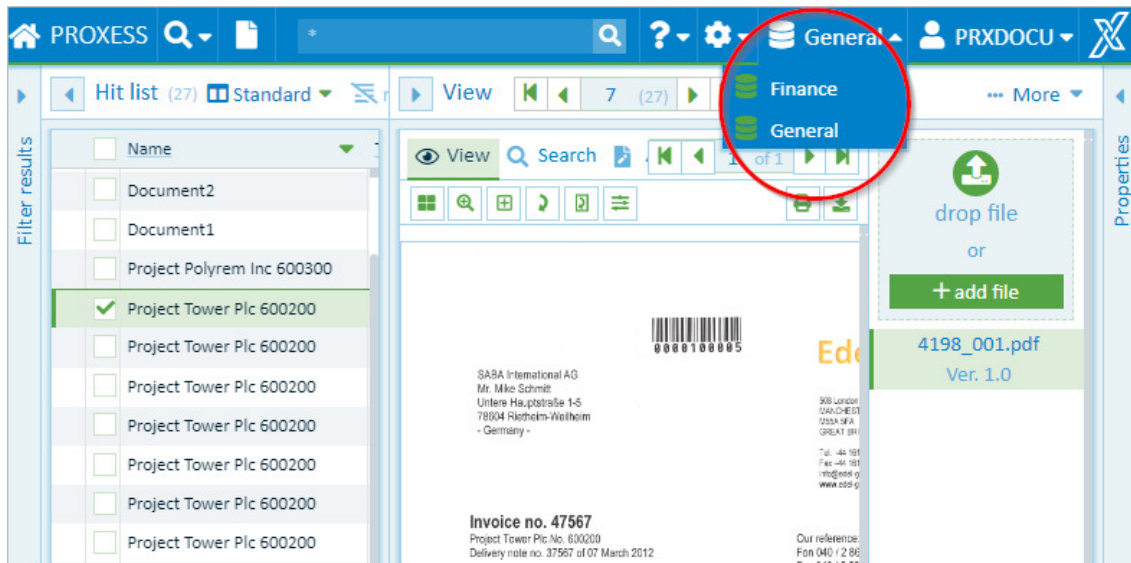
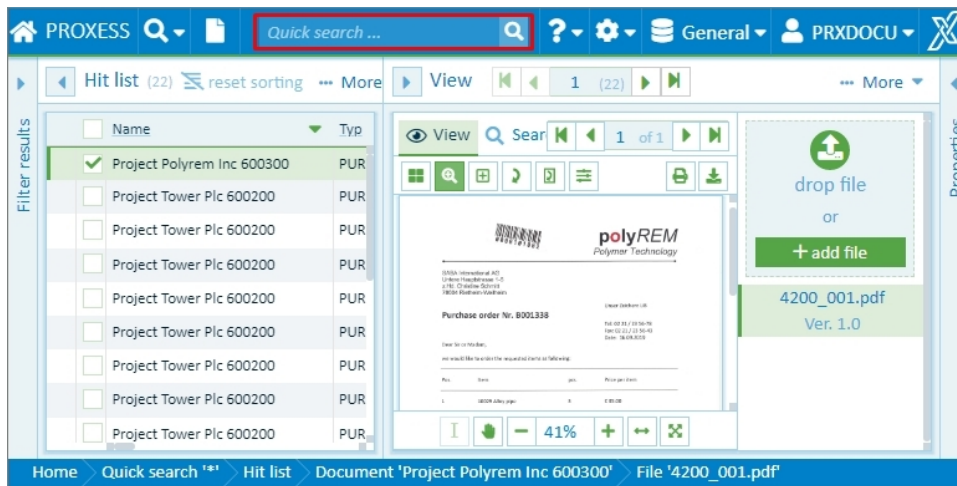
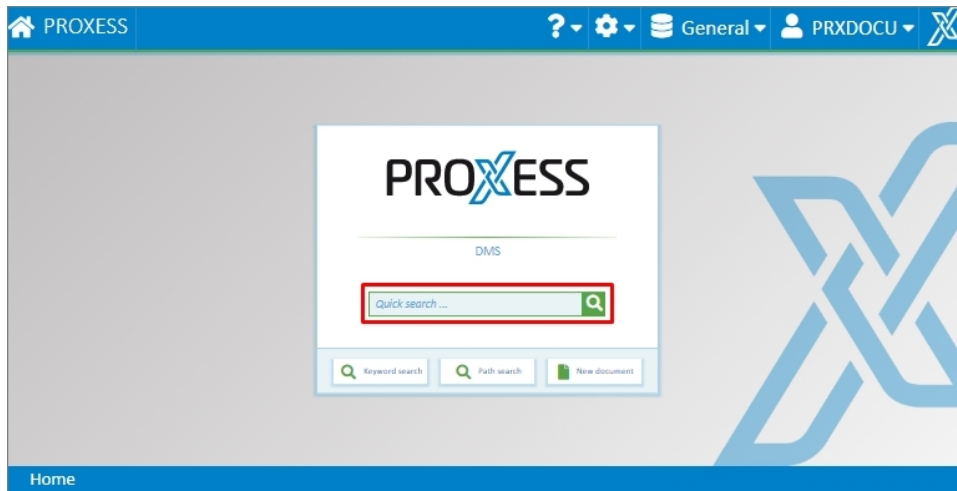


Fig.: Select database

When you open the menu, you can see the list of all available archive databases for which you are authorized. If you want to be connected to another archive, just select the desired database. After the next login, you will automatically be connected to the most recently selected database.

Quick search

You can find the quick search directly on the start page and in the main menu of the PROXESS Web Client:



The following rules apply for entering the search condition:

- A full-text search is performed for all documents **and** file contents.
- Depending on the user setting, a placeholder may be added automatically at the beginning and/or end of your search term. (See: [Settings \(user\)](#))
- You can set an AND connection with the “AND” operator. For example: ‘Natural stone tile AND adhesive surface’ or ‘natur% AND adhesive%’.
- You can set an OR connection with the “OR” operator. Example: ‘Natural stone tile OR adhesive surface’ or ‘natur% OR adhesive%’.
- When you enter the search conditions, any differences in the uppercase or lowercase letters are not considered, i.e. the search is “case-insensitive”.

Start the search process with the **magnifying glass** or the **keyboard command (ENTER)**.

You can narrow down the result of the quick search further with the [filter search](#).

Filter search

After you have performed a [quick search](#), you will get a hitlist with a filter function:

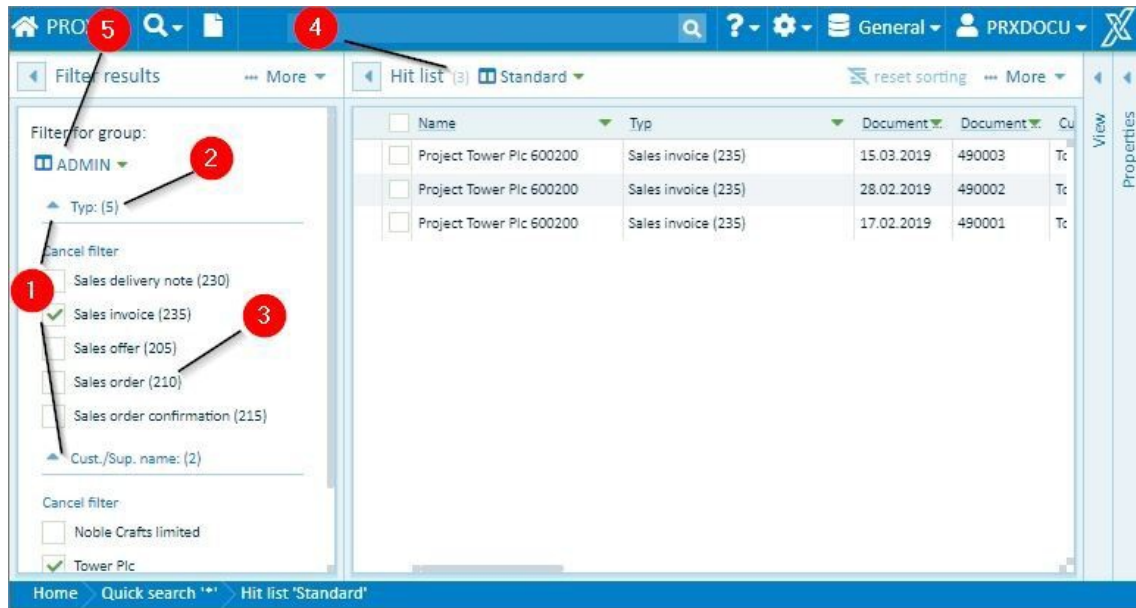


Fig.: Filters and hitlist after a performed quick search

1	Filters	The possible files to limit the hitlist are shown. These options are specified by the administrator (see configure filter search).
2	Number of filters	The number in the brackets behind the filters shows how many other secondary filters are available for the current search.
3	Select/remove filters	When the filter options are selected (e.g. type, customer name), the search results are adjusted dynamically and the hitlist can be narrowed down even further. You can remove filters that were already placed by clearing the check mark with a click on the filter.
4	Number of hits	You can see the number of hits that correspond to your criteria in brackets in the upper description bar under "Hitlist".
5	Select filter profile	One filter profile can be created per group. If you are a member in multiple user groups, you can select from multiple filter profiles where appropriate.

Configure filter search (only for administrators)

As an administrator, you can determine which fields are offered for filtering. In principle, all indexed fields in a database can be selected.

Step by step:

1. First perform a quick search and then select the **Configure** command next to the **Filter results** section in the menu of the filter search.

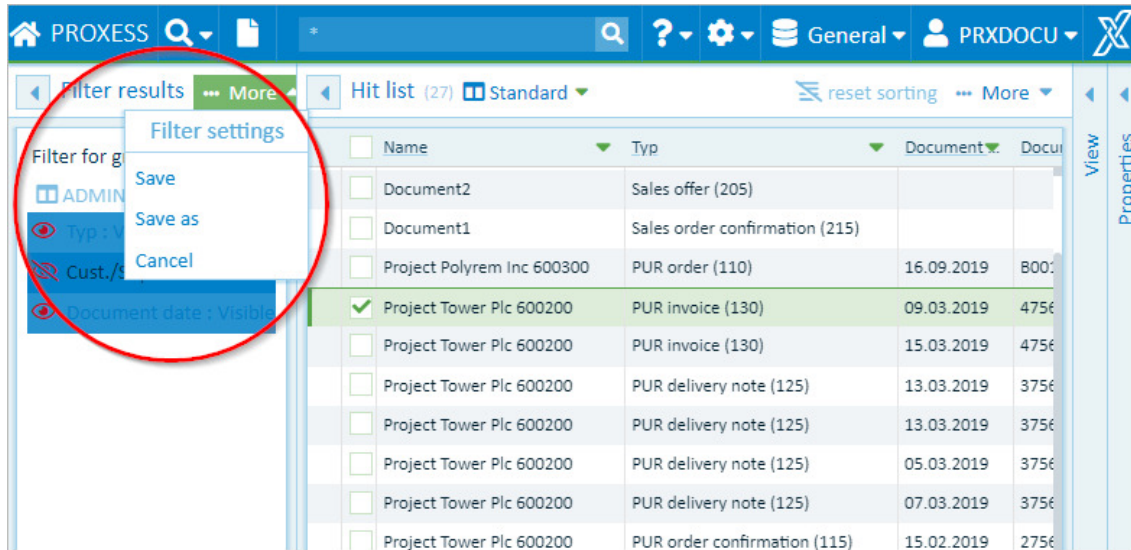


Fig.: Configure filter search

2. In the title bar, select the user group for which you would like to create a configuration. The existing configuration is shown and you can change the settings.
3. With the "Eye" symbol, you can hide or display fields.
4. You can move the order of the displayed fields with drag & drop.
5. Select the **Save** command in the menu to save your settings for the current group.
Or select the **Save as** command in the menu to choose the group for which this filter display should apply. One display can be saved per group.

Automatic search term completion

You can find the automatic search term completion in the keyword search.

The system automatically suggests search terms based on already archived documents.

Example:

If you enter the characters "Pro" in the name field, you will get a list of suggestions with all name entries starting with "Pro".

The search term completion starts after the third character has been entered. It makes no difference whether you enter the characters in uppercase or lowercase letters.

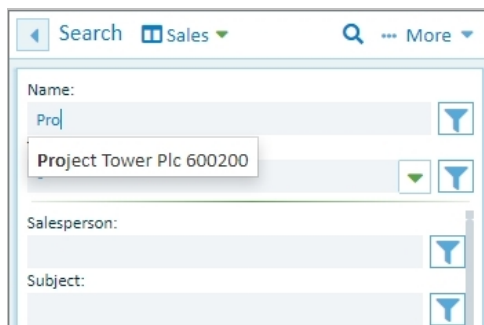


Fig.: List of suggestions for automatic search term completion

Overview of keyword search

You can start the keyword search on the home page or via the **Search** menu.

For the keyword search, enter your search term or terms directly in the index fields. This allows you to search for documents quickly and efficiently. The more search terms you enter, the shorter your hitlist will be.

Step by step

1. Select the appropriate search mask first. You can choose between personal search masks that you created previously or global search masks that the system administrator provided for you.

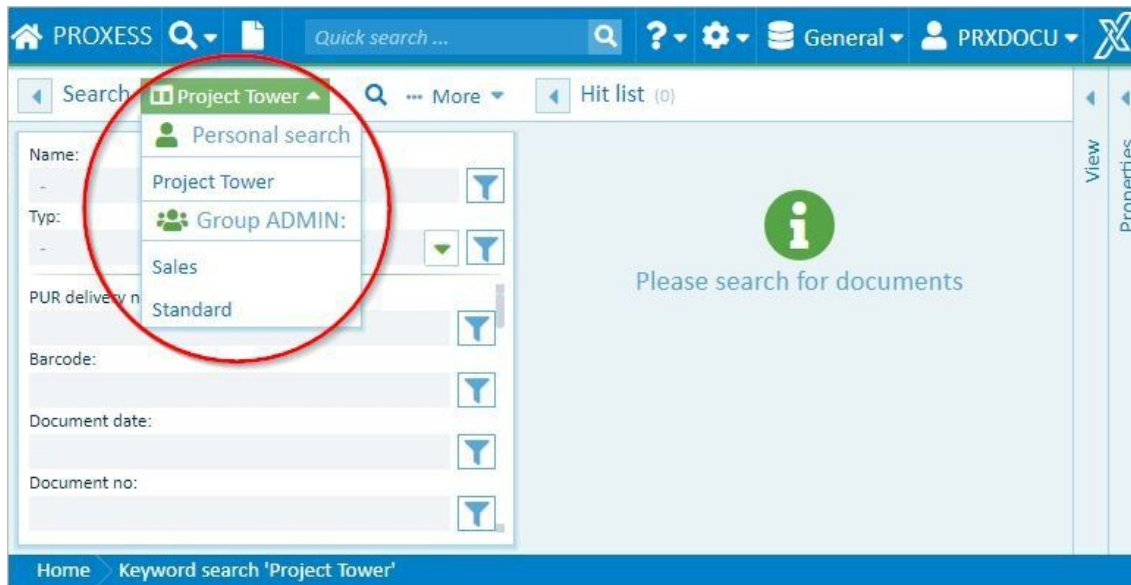


Fig.: Selection of the proper search mask

2. Now enter your search terms directly in the search mask. You can enter search conditions into just one field or several fields simultaneously.

Depending on your user setting, a placeholder may be automatically added to your search term. (See: [Settings \(user\)](#))

By clicking the magnifying glass, you perform the search:

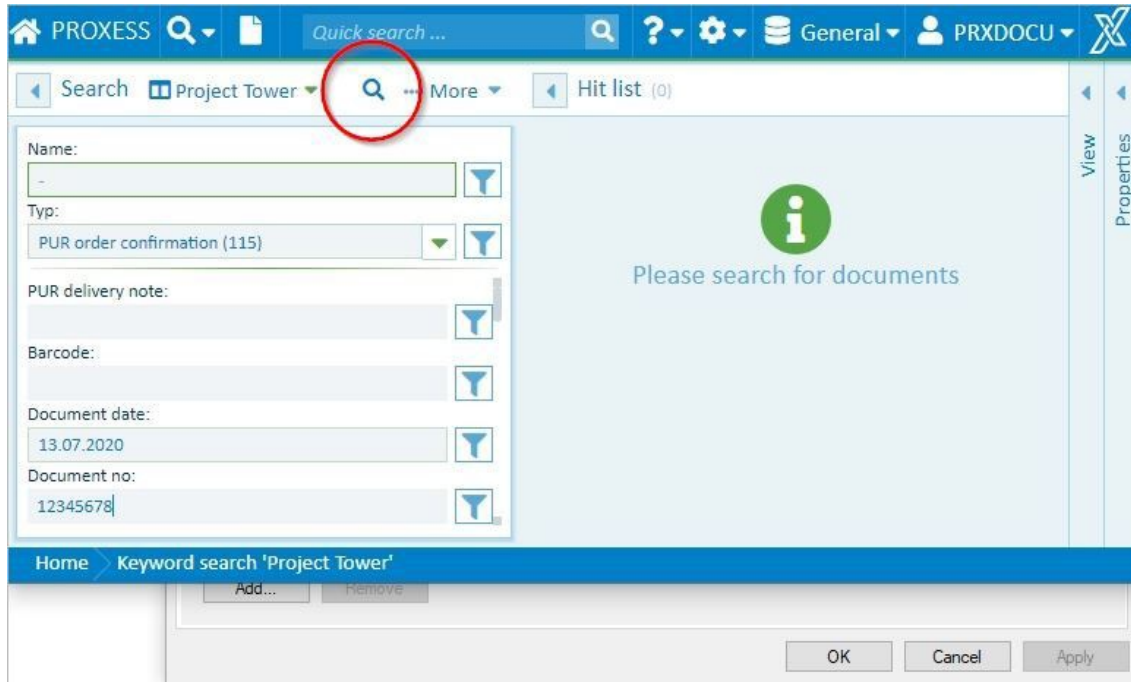


Fig.: Execute search

When you enter the search conditions, you are assisted by a range of functions:

Automatic search term completion

The system automatically suggests search terms based on already archived documents.

Example:

If you enter the characters “Pro” in the name field, you will get a list of suggestions with all name entries starting with “Pro”.

The search term completion starts after the third character has been entered. It makes no difference whether you enter the characters in uppercase or lowercase letters.

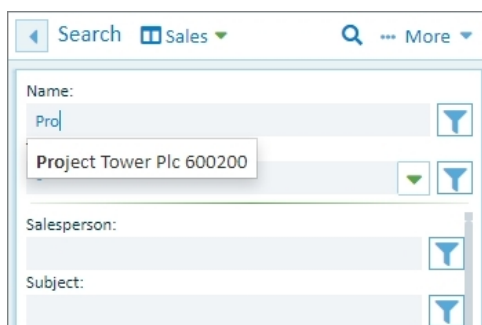


Fig.: Suggestions for automatic search term completion

[Go to video tutorial](#)

Select entry from the list

An arrow symbol next to a search field indicates a saved list of terms from which you can choose an entry. For the (document) type field, for example, there is always a fixed list of all stored document types.

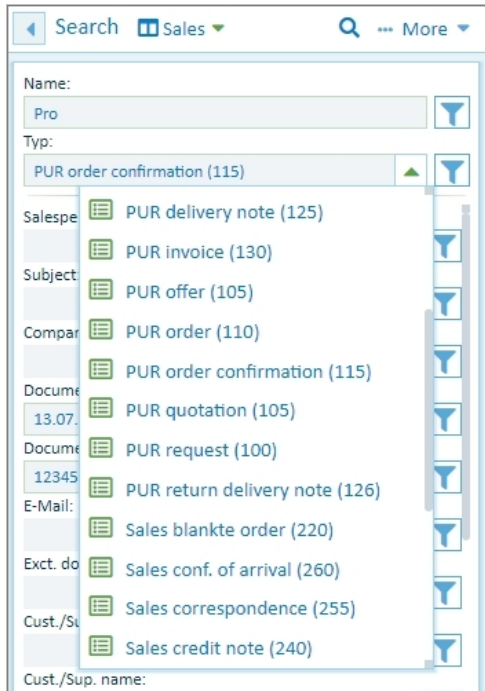


Fig.: List of all document types in the archive

Enter search condition with the search wizard

Another option for the keyword search is to phrase the search condition with the help of the search wizard.





Next to each keyword field, you can find the  symbol with which you can open the search wizard. The search wizard helps you enter the search term and shows the various options for specifying the search precisely. Select **OK** to enter your search condition in the field.




Fig.: Search wizard for the customer name field

Operator	Optional syntax for direct field entry	
-----------------	---	--

=	=	The entered search term must be spelled precisely. This takes into account the general user settings in which you can determine whether the entered search term is automatically written with or without the placeholder.
between	..	<p>The searched field content must range from the lower to the upper value, inclusively.</p> <p>The BETWEEN operator can be used for text fields, date fields and number fields. Searching with a placeholder is not possible here.</p> <p>Example: Search for all customers whose name starts with the letters "A" and "G".</p> <p>The correct search entry must be: search BETWEEN "A" and "H". Because "H" is the first entry after all customer names beginning with "G".</p> <hr/> <div style="border: 1px solid black; padding: 5px;">  <p>However, a number search (e.g. between 4700 and 5000) only works if the system administrator created the field to contain only numbers (number field).</p> </div>
multiple	,	An OR condition is used here. The search result shows all documents that contain at least one of the entered search terms. The search term and field content must be identical. Searching with a placeholder is not possible here.
<>	<>	The searched field content must be unlike the entered value.
<	<	The searched field content must be lower than the entered value.
<=	<=	The searched field content must be lower than or equal to the entered value.
>	>	The searched field content must be greater than the entered value.
>=	>=	The searched field content must be greater than or equal to the entered value.
is empty	IS_NULL	Nothing should be entered in this field.
is not empty	IS_NOT_NULL	This field may not be empty.

Also see: [Keyword search with the search wizard](#)

If you have entered your search terms into the fields, you can start the search with the  magnifying glass.


See an overview of the keyword search in this video:

[Go to video tutorial](#)

Configure search (keyword search)

As a user, you can set up and use personal search masks and also save them as a template.

Step by step:

1. Open the keyword search either via the PROXESS Web Client menu on top or via the “Keyword search” tile on the start page.
2. If you want to set up a new search mask, open the search menu with this symbol:  and select **New**.
If you want to change an existing search mask, choose it from the selection list of the search.
3. Now select the **Configure** command in the search menu.
4. You can now set up your personal search mask:

Hide/display fields	Use the trash can symbol to hide or display fields. Hidden fields have a darkened background.
Move fields	You can move the order of the fields in the search mask with drag & drop.
Specify fixed search values	Enter recurring search values in the desired field. They will be called up automatically with the search mask. Example: the “North” entry in the “Region” field
Cancel/apply	You can save your new search mask with the check mark. To cancel your configuration, use the x symbol.

The first two fields (here: “Subject” and “Type”) of a search mask are mandatory fields that cannot be hidden or moved.

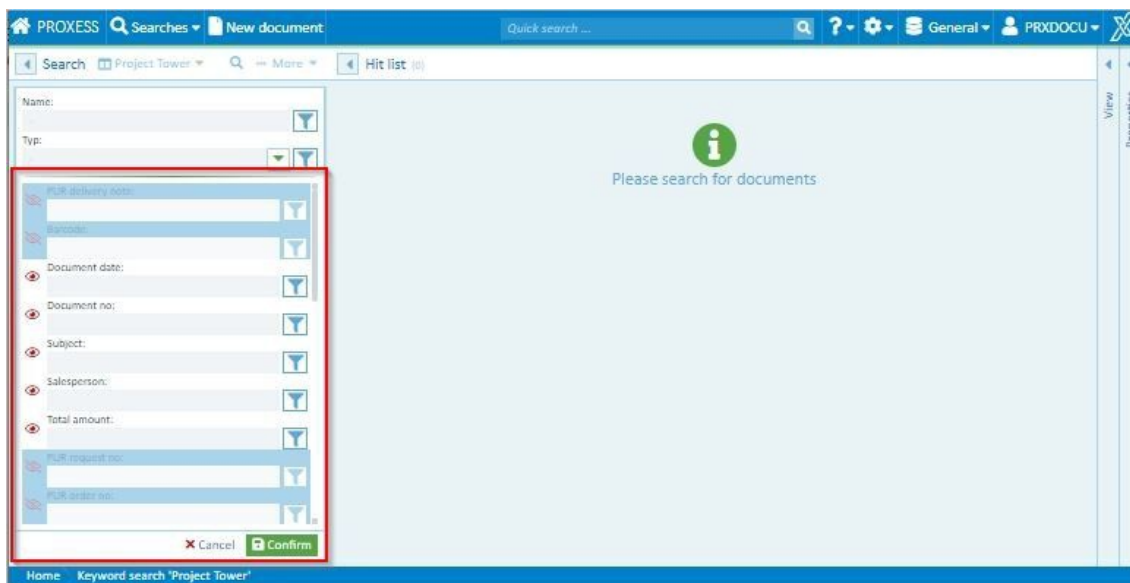


Fig.: Configuration of a personal search mask in the keyword search

5. Now you can perform the search directly with the magnifying glass symbol.
6. To save the new settings as a template, select the keyword search menu and click on **Save as**.

7. Assign a name and select **OK**.

Tipp



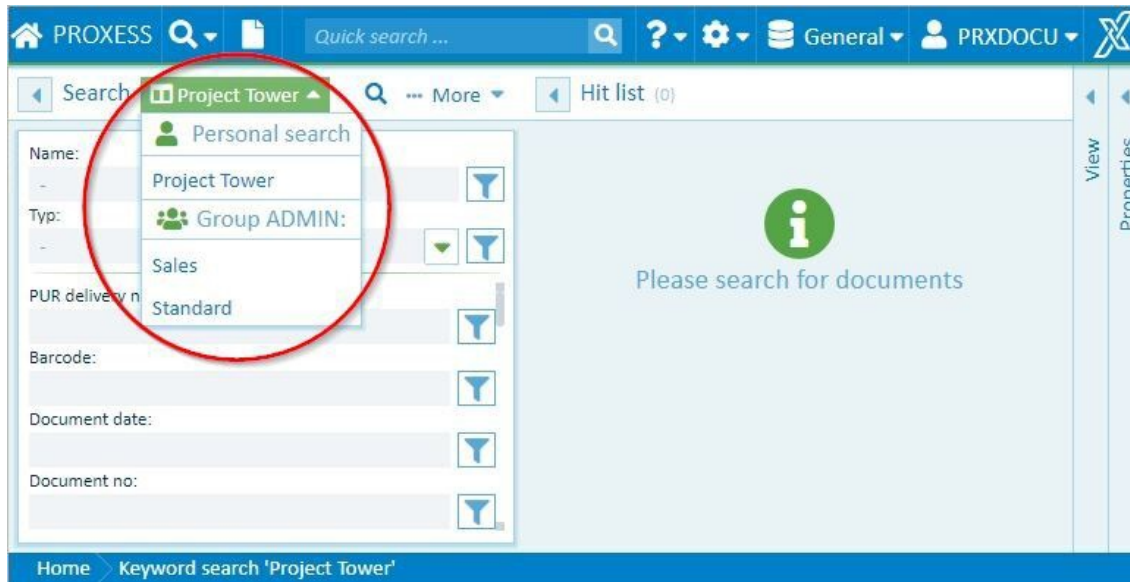
As an administrator, you can also save the created searches as a template for PROXESS user groups.
You can select the desired user group in the save dialog.

[Go to video tutorial](#)

Save, rename, delete search (keyword search)

If you perform a particular search more frequently, you can save the search with pre-allocated fields.

1. Open the keyword search via the PROXESS Web Client menu and the search menu there. Depending on the user setting, the most recently used search mask or the standard search mask will appear.
2. Select a search mask from the list:



You can create, change or delete personal searches. You can use searches set up by your system administrator but not change them. However, there is the option of calling up a general search mask, saving it as a personal search and then customizing it.

First define your search conditions by entering them or by calling up an existing search mask and editing it.

Open the expanded menu in the “Search” window section.

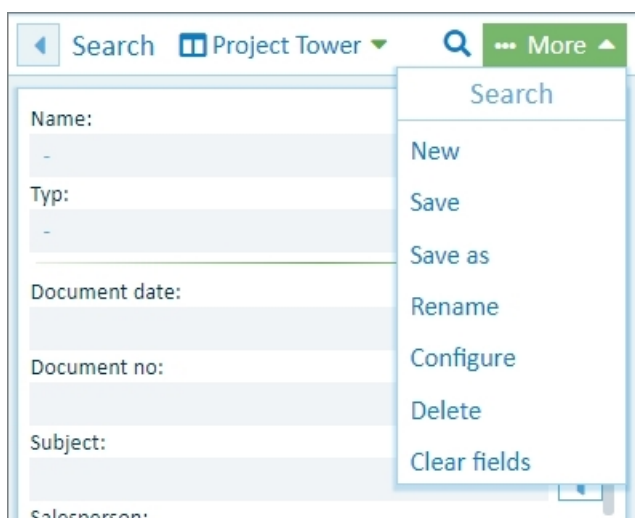


Fig.: Currently selected keyword search “4 Sale” and “Search” menu

New	All fields of the archive are displayed as empty fields in a new – still unnamed – search mask.
Save	The selected search mask is overwritten with the current search terms.
Save as	The current search mask is saved under a new name. This allows you to create a new personal search.
Rename	To rename a search from the list, open it first. Then select the Rename command in the “Search” menu.
Configure	Here you can hide and display fields and move them. Information about this can be found under Configure keyword search .
Delete	The current search mask (e.g. “4 Sale”) is deleted. Now it will no longer appear under “Personal searches” in the selection list.

[Go to first video tutorial](#)

[Go to second video tutorial](#)

Select search mask (keyword search)

You can start the keyword search on the **home page** or via the main **Search menu**:



Fig.: Search menu

For a keyword search, enter your search term or terms directly in the index fields. This allows you to search for documents quickly and efficiently. The more search terms you enter, the shorter and more precise your hitlist will generally be.

Select the appropriate search mask. You can choose between personal search masks that you configured previously or global search masks that the system administrator provided for you.

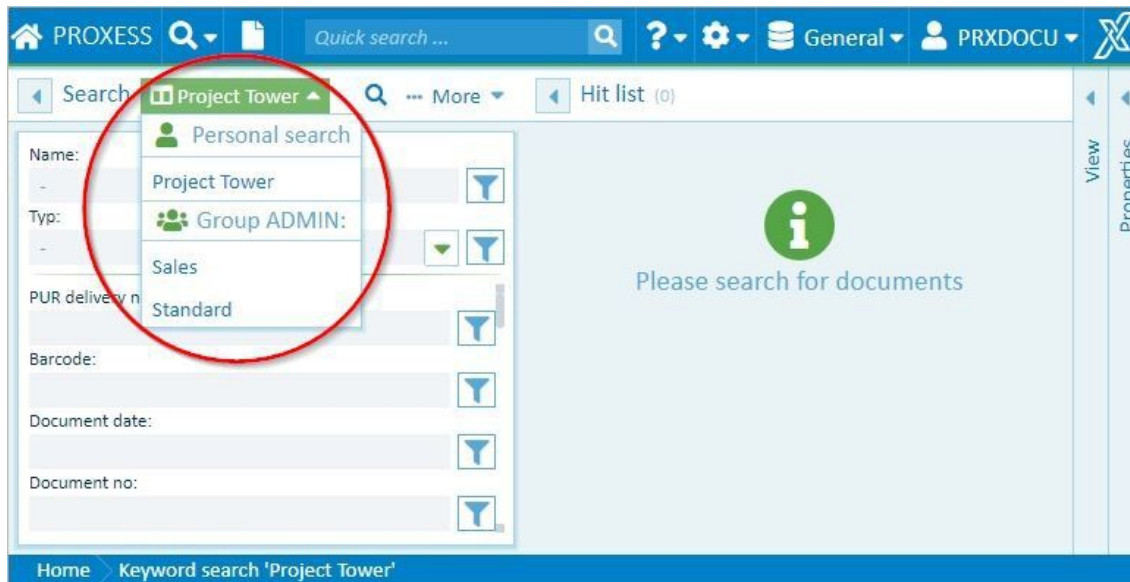



Fig.: Select search

The different search masks vary in their displayed search fields and in the order of these fields. Some fields may also be filled with search terms already.

Sample search mask: Representative John Doe


In the "Representative" field, the search term "John Doe" is already entered. This value can be overwritten or deleted for each search process.

You can perform your search with the  symbol.

Search wizard (keyword search)

The search wizard helps you enter a search condition in a keyword search field.

Step by step:


1. Open the keyword search either via the PROXESS Web Client menu on top or via the “Keyword search” tile on the start page.
2. Select your desired search mask.
3. You can open the search wizard via the dots menu next to the search field. 
4. The left column consists of the operators and the right side of the input fields.
Always select the operator first and then enter the search values in the corresponding input field.



Operator	Value
=	1000
Between	5000
Multi	
unequal	
<	
<=	
>	
>=	
Is empty	
Is not empty	

Fig.: Search wizard for the customer name field

Operator	Syntax (field entry)	
=	=	The entered search term must be spelled precisely. This takes into account the general user settings in which you can determine whether the entered search term is automatically written with or without the placeholder.

between	..	<p>The searched field content must range from the lower to the upper value, inclusively.</p> <p>The BETWEEN operator can be used for text fields, date fields and number fields. Searching with a placeholder is not possible here.</p> <p>Example: Search for all customers whose name starts with the letters "A" and "G".</p> <p>The correct search entry must be: search BETWEEN "A" and "H". Because "H" is the first entry after all customer names beginning with "G".</p> <hr/> <div style="border: 1px solid black; padding: 5px;">  However, a number search (e.g. between 4700 and 5000) only works if the system administrator created the field to contain only numbers (number field). </div>
multiple	,	<p>An OR condition is used here. The search result shows all documents that contain at least one of the entered search terms. The search term and field content must be identical. Searching with a placeholder is not possible here.</p>
<>	<>	The searched field content must be unlike the entered value.
<	<	The searched field content must be lower than the entered value.
<=	<=	The searched field content must be lower than or equal to the entered value.
>	>	The searched field content must be greater than the entered value.
>=	>=	The searched field content must be greater than or equal to the entered value.
is empty	IS_NULL	Nothing should be entered in this field.
is not empty	IS_NOT_NULL	This field may not be empty.

5. Confirm your input with **OK**. Now the search condition is entered in the search mask field.

You can also enter the applied writing style (e.g. 'AB ... HS' for a search with the BETWEEN operator) directly in the respective field in the search mask or change it.

You can repeat the process with additional fields in the search mask to narrow down your search.

If you want to execute your defined search repeatedly, you can save it as a personal search. (See: [Save, rename, delete keyword search](#))

You can start your search with the “Magnifying glass” symbol.

[Go to video tutorial](#)

Search in the viewer

With this search integrated in the viewer, you can find words, entire sentences or numbers within the currently displayed file.

The search functions are displayed when you click on the “Search” menu.

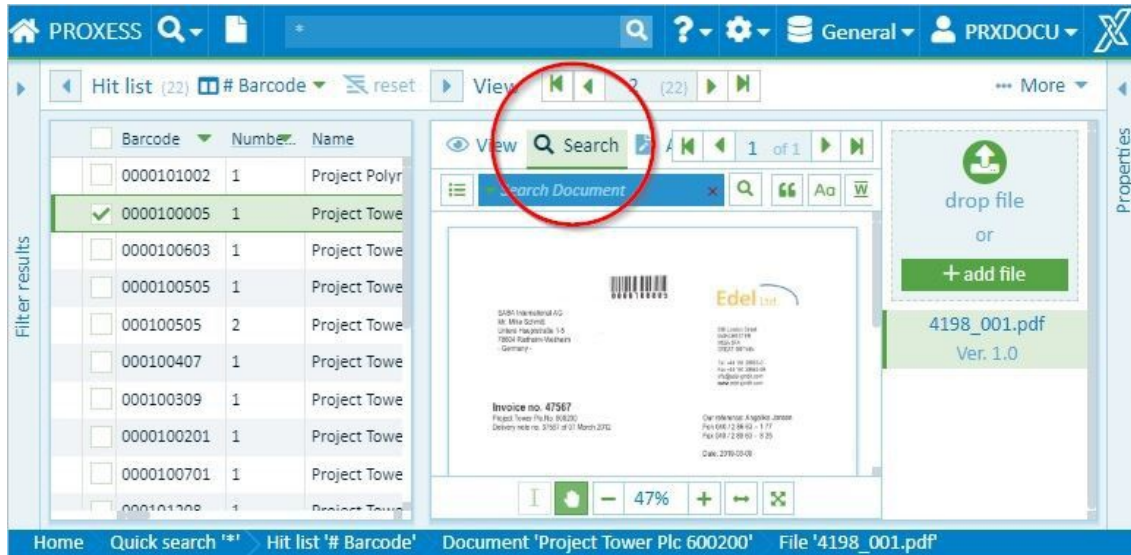


Fig.: Search menu of the PROXESS Web Client viewer

	This will show you the result list of the search. The display can be shown or hidden.
	This is where you enter your search term .
	Start the search with the magnifying glass.
	If you select this icon, there has to be concordance in the entire word or sentence if you want to search for multiple words at once. Example: If you searched for “acce”, you would not get any results. You would have to enter the full word, “accessories”.
	If this option is activated, the search must match the case .
	If you select this icon, there has to be concordance in the entire word . Example: If you searched for “acce”, you would not get any results. You would have to enter the full word, “accessories”.
	Automatically sets a placeholder behind the search term .
	Automatically sets a placeholder in front of the search term .
	Uses manually entered placeholders ‘ * ’ for the search.



With **proximity search**, you can search for multiple words simultaneously and specify which distance they should have to each other.

If you are looking for “hereby” and “I” with distance 2, for example, the displayed file is searched for all combinations of the two words that are a maximum of two words apart.

[Go to video tutorial](#)

Path search

The path search is a good way to search if you do not know an exact search term. The path search takes you through the existing documents. In this process, you can continue to narrow down the hitlist at every level.

You can find the path search directly on the home page or in the **Search** menu.

A search path determines the keywords and their order with which you can perform your search. There can be multiple search paths. You can select the search paths with the selection list next to the “Path search” entry. All search paths are set up by the system administrator.

The screenshot shows the PROXESS web client interface. At the top, there is a navigation bar with 'PROXESS', 'Searches', and 'New document' options. Below this, the 'Path search' section is active, showing a search path for 'customer'. The interface is divided into three main columns: 'Cust./Sup. name', 'Cust./Sup. no', and 'Typ'. Each column has a search input field and a list of results. The 'Typ' column is currently selected, showing a list of document types such as 'PUR return delivery note (...)', 'Sales blankte order (220)', 'Sales conf. of arrival (260)', 'Sales correspondence (255)', 'Sales credit note (240)', 'Sales delivery note (230)', and 'Sales enquiry (200)'. The 'Sales delivery note (230)' is highlighted. Below the search columns is a 'Hit list' section with a table showing search results. The table has columns for 'Name', 'Typ', 'Document', and 'Document'. The first row is highlighted, showing 'Project Tower Plc 600200', 'Sales delivery note (230)', '28.02.2019', and '390001'. To the right of the hitlist is a 'View' section showing the details of the selected document. It includes the address 'Tower PLC, 15 Tower Street, LONDON, SW1W 6LB, Great Britain', the document title 'Delivery note No. 390001', and a project description 'Project: elevator compact & exclusive'. Below this, there is a table with two rows of document details:

No.	description
10118	elevator compact PROXESS elevator mono R-series compact wire cable, 4 - 13 people (320 - 1000 kg), speed: 1,0 m/s, maximum stations: 12 delivery date: 28/03/12
10120	elevator exclusive PROXESS elevator mono R-series exklusiv Wire cable, 6 - 26 people (maximum 2000 kg)

Fig.: Possible selection from the set-up search paths

Step by step:

1. First select the desired search path.
2. Now click through the columns to narrow down your hitlist and find the desired document.
3. If the list in a column is too long or you are only specifically searching for a customer name, you can enter it in the input field above the column.
4. You can see the results in the “Hitlist” area and can now select and display the searched document.

[Go to video tutorial](#)

Set up hitlist

The hitlist shows all documents found during your search.

The number in parentheses behind the title "Hitlist" shows the number of hits (here: seven hits).

You can select the layout for the hitlist in the selection list on the right.

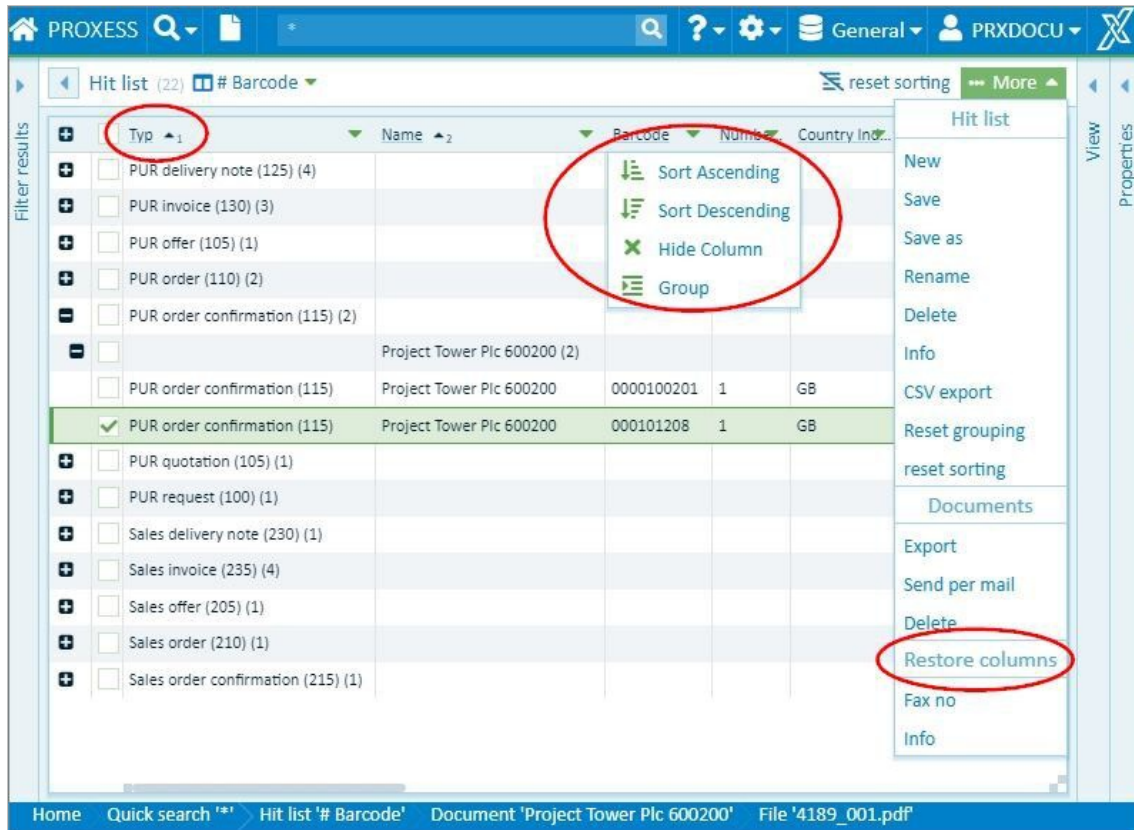



Fig.: Set up hitlist

The small arrow in each column opens further options to set up the hitlist:


Sort in ascending order	The hitlist is sorted according to the field value in this column in ascending order (e.g. from A to Z). Columns that are sorted in ascending order have a small arrow pointing up in the column title.
Sort in descending order	The hitlist is sorted according to the field value in this column in descending order (e.g. from Z to A). Columns that are sorted in descending order have a small arrow pointing down in the column title.
Sort multiple columns	If multiple columns should be sorted simultaneously, you can set up a hierarchy for sorting. To sort multiple columns, keep the SHIFT key pressed and click on the sorting of the columns in the desired order. You can see the order of the hierarchy by the small number next to the column title.
Reset sorting	The column is no longer sorted in ascending or descending order.

Hide a column	In the column options, you can hide a column that is not relevant to your work. This makes the hitlist leaner and clearer.
Group	See Group hitlist
Restore columns	You can display hidden columns again via the hitlist menu .
Move columns	You can move the order of the columns with drag & drop.
Adjust the column size	You can also drag the column width with your mouse to make them wider or narrower. With a double-click on the line between two columns, you can optimally set the column width.

When you have adjusted the hitlist according to your preferences, save the layout in your hitlist menu so you can continue to reuse this configuration.

Open the hitlist menu with  and select the **Save** command. The existing hitlist is overwritten with the new changes.

If you want to save this layout for the hitlist under a new name, select the **Save as** command.


	If the search mask and hitlist have identical names, the hitlist with the same name is automatically displayed after the search.
---	--

Digression: Set up a layout for the hitlist for user groups (only for administrators)

As an administrator, you can configure layouts for the hitlist and assign them to user groups in PROXESS.

Create a layout for the hitlist as described above and then select the **Save as** command in the hitlist menu.

Now enter a name for the hitlist layout and assign a group from the list.

	A user can be a member of multiple groups. Each user will see the hitlist layouts assigned to their “first group”. You can check which one is the “first group” in the group hierarchy in the PROXESS Management Console.
---	---

Create new hitlist

You can adjust the layout of the hitlist by moving columns, changing their size or hiding them completely. You can create various layouts for the hitlist and save them.

This is how you can create a new layout.

Step by step:

1. Open the hitlist menu with the **More** command and select the **New** command in the hitlist section.
A new hitlist opens that has not been configured yet.
2. Now you can configure it as you like. You can learn how to do this in the "[Set up hitlist](#)" help topic.
3. To save your edits, select the **Save as** command in the hitlist menu.
4. Enter a name for the hitlist in the dialog box.
5. Select **Save**. Now your hitlist is saved as your personal hitlist.
6. You can now access this layout through the selection menu in the description bar of the hitlist.



If the search mask and hitlist have identical names, the hitlist with the same name is automatically displayed after the search.

Digression: New layout for the hitlist for user groups (only for administrators)

As an administrator, you can create new layouts for the hitlist and assign them to user groups in PROXESS.

1. Create a layout for the hitlist as described above and then select the **Save as** command in the hitlist menu.
2. Now enter a name for the new hitlist layout and assign a group from the list.
3. Select **Save**. The hitlist is now saved as the hitlist layout for the group.



A user can be a member of multiple groups. Each user will see the hitlist layouts assigned to their "first group". You can check which one is the "first group" in the group hierarchy in the PROXESS Management Console.

Scroll through the hitlist

After you have performed a search, you will see the hitlist.

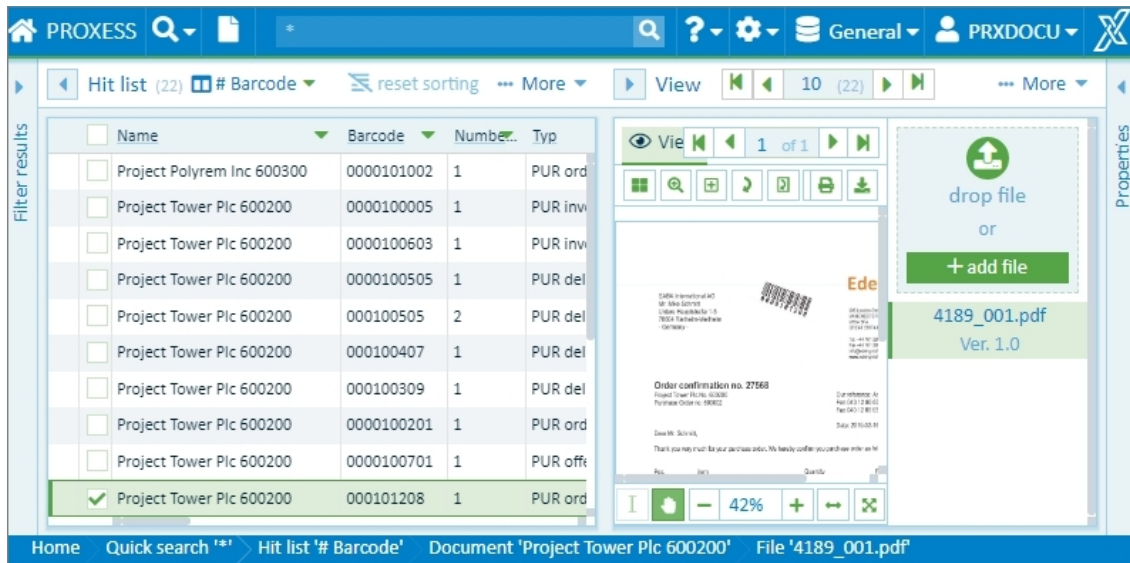


Fig.: Hitlist in PROXESS Web Client with document display

1	Number of hits	In the title bar of the hitlist, you can see the number of documents found during a search (here: seven).
2	Scroll through documents in the hitlist	Above the document display, you can scroll through the individual documents of the hitlist (here: Document one of seven documents). You can use the arrow keys on the keyboard to scroll up or down through the hitlist. Press "Enter" to display the selected document.
3	Scroll through pages of the displayed file	In the display line, you can scroll through the pages of the currently shown file (here: page 1 of 1). You can use the image up/down keys on the keyboard to scroll up or down through the document. Press "Enter" to display the selected file.
4	Scroll through the files of a document	To the right of the document display, you can see the files in a document as icons (here: "Production order..." and "00101434.pdf"). You can open these files by clicking on them.

Group hitlist

The hit in a hitlist can be grouped according to the values in a column.

To group the hits, click on the small arrow in the column and select the “Group” option.

Name	Barcode	Number	Typ	Country	Cust./Sup.	Com
Project Polyrem Inc 600300 (1)						
Project Polyrem Inc 600300		2	PUR request (100)	GB	Polyrem Inc	01
Project Tower Plc 600200 (9)						
Project Tower Plc 600200	00480031	1	Sales invoice (235)	GB	Noble Craft...	02
Project Tower Plc 600200		1	Sales invoice (235)	GB	Tower Plc	01
Project Tower Plc 600200		1	Sales invoice (235)	GB	Tower Plc	01
Project Tower Plc 600200		1	Sales invoice (235)	GB	Tower Plc	01
Project Tower Plc 600200		1	Sales delivery note (230)	GB	Tower Plc	01
Project Tower Plc 600200		1	Sales order confirmation (215)	GB	Tower Plc	01
Project Tower Plc 600200		1	Sales order (210)	GB	Tower Plc	01
Project Tower Plc 600200		1	Sales offer (205)	GB	Tower Plc	01

Fig.: Hitlist grouped according to “Customer/supplier name and type”

Now all documents with an identical value in this column are grouped and shown among each other.

With the “+” and “-” symbols, the hits for a value are displayed or hidden.

The grouping of the hitlist can be expanded hierarchically with multiple columns.

Example: First group according to the customer/supplier name and within the customer/supplier name according to the document type. You can recognize the hierarchy by the number in the column header.

Name	Barcode	Number	Country	Cust./Sup.	Company	Docu
PUR delivery note (125) (4)						
PUR invoice (130) (3)						
Project Tower Plc 600200 (3)						
PUR invoice (130)	Project Tower Plc 600200	0000100005	1	GB	Edel Ltd	01

Fig.: Hitlist grouped according to customer/supplier name and according to type

Export hitlist as CSV file

The hitlist can be exported as a CSV file, e.g. to open it in Microsoft Excel. Open the hitlist section menu and select the **CSV export** command.

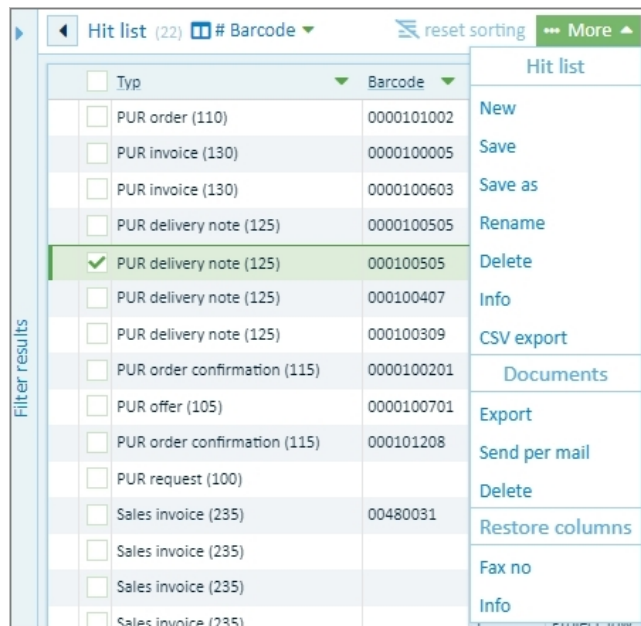


Fig.: Hitlist menu

Display document

With PROXESS Web Client, documents can be displayed, enlarged, reduced and you can scroll through the documents and files.

The document view is shown directly in the PROXESS Web Client without requiring the original application associated with the displayed file.

No separate window or new tab is opened in your browser if you want to view a document.

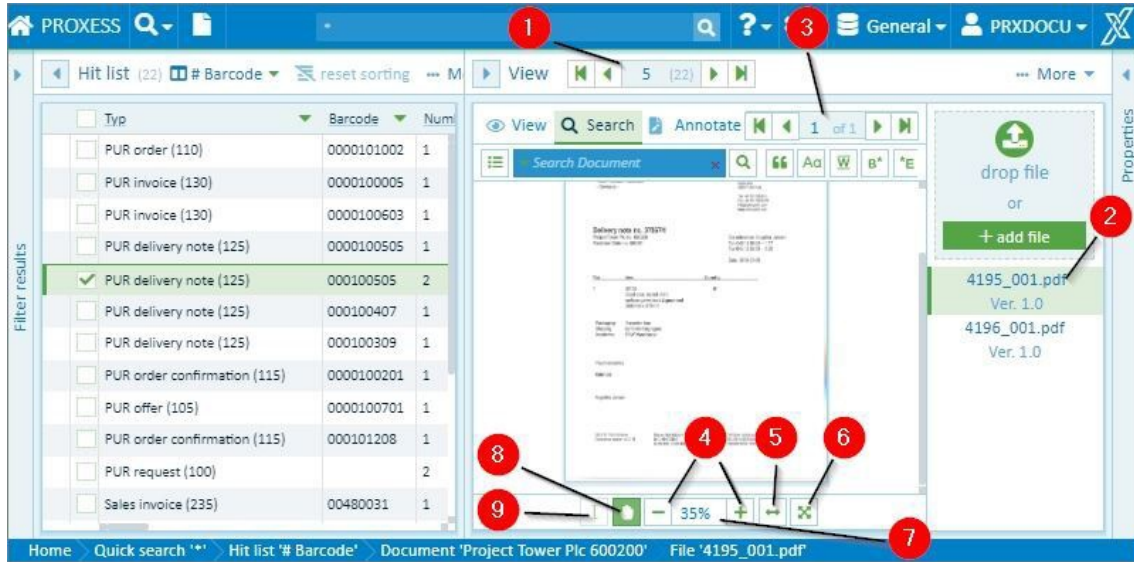






Fig.: Integrated document display in PROXESS Web Client

Here you can find an overview of the most important display functions:

1	Scroll through documents	<p>In the header of the display, you can see which document in the hitlist is currently shown (here: document 18 of 63).</p> <p>You can use the arrows in the header of the display to scroll through the individual documents in the hitlist, going backward and forward or to the first/last document.</p>
2	Scroll through files of a document	<p>If a document contains multiple files, you can see them all as icons on the right next to the document display (here: "Delivery note" and "Datasheet"). You can open these files by clicking on them.</p>
3	Scroll through pages of a file	<p>In the display line above the file, you can scroll through the pages of the currently viewed file (here: page 1 of 1).</p>
4	Enlarge/reduce file display (zoom)	<p>You can enlarge or reduce the document display with "+" or "-".</p>
5	Fit file display to window width	<p>With the  symbol, you can fit the file display to the width of your current window.</p>

6	Show file in full screen mode	With the  symbol, you can show the file in full screen mode. By clicking on the symbol again, you can exit the full screen mode.
7	Adjust the view by a percentage	Clicking on this opens the menu in which you can enlarge/reduce the view by a percentage.
8	Manually move the file	You can use the hand icon  to move the excerpt of the file. Click on the hand icon and keep the mouse button pressed down to drag the file to the desired position.
9	Mark text inside the file	With the  symbol, you can switch to text marking mode. Keep the mouse button pressed and drag it across the text. You can copy it to the local clipboard with CTRL + C.


You can find additional display functions in the [Display functions of the viewer](#) help topic.


[Go to video tutorial](#)


View document information

When a document is open, you can display further information about the document in the “Information” window area.

The document name and type are the minimum information about an archived document.

All other keywords can be found under the info tab  and may also be distributed to multiple pages.

If a document has cross-references to other documents, they are shown under the  tab and can be opened there directly with a double-click.

You can find earlier versions of the corresponding files in the version tab .

Open the “Information” menu:

With the **Edit** menu item, you can [edit keywords for the document](#).

Use **Download** to download the document from the archive to your local computer (see: [Export document](#)).

If you want to [send a document by email](#), select **Send email**.

With the **Clear** menu item, you can [delete the document](#).

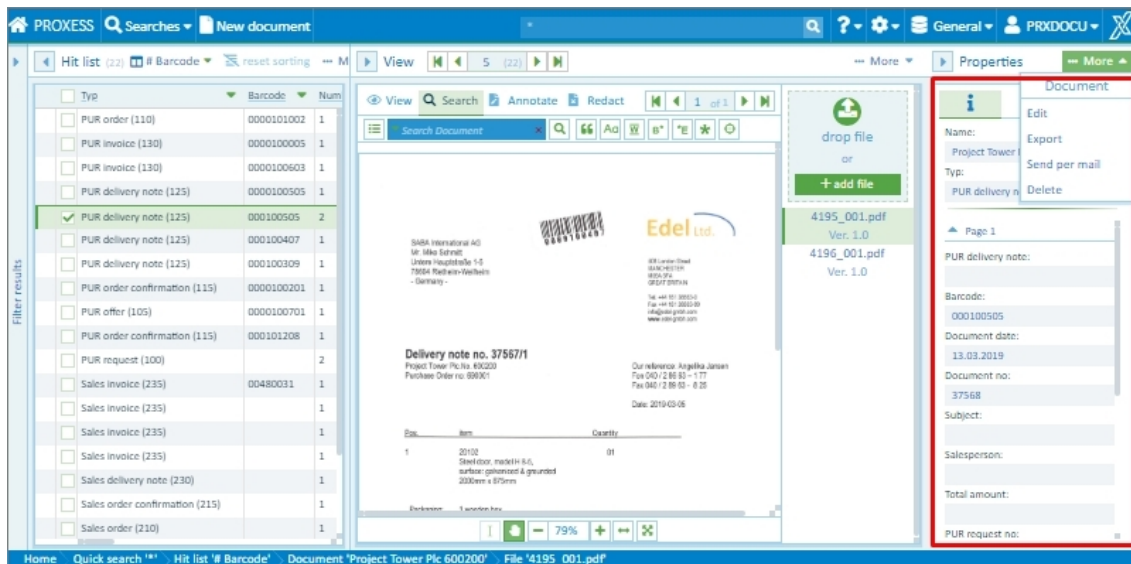


Fig.: Document information

Cross-reference

You can find cross-references to a document in the Information section in the Cross-reference tab with this symbol:



A cross-reference is a document that has also been archived and is linked to the current document. In most cases, cross-references are created automatically via PROXESS import modules or the PROXESS Scan Client. This makes it possible, for example, to link multiple incoming goods in an archived collective invoice.

When you click on a cross-reference, the cross-referenced document opens in the PROXESS Web Client.

Display document in the viewer

In PROXESS Web Client, documents are displayed in an integrated viewer. This makes you independent of the original program with which the file was created.

In addition to the scroll and display functions that are explained in the [Display document](#) help topic, the viewer has its own display and search menu.

The display functions are shown when you click on **Display** in the title bar of the viewer.

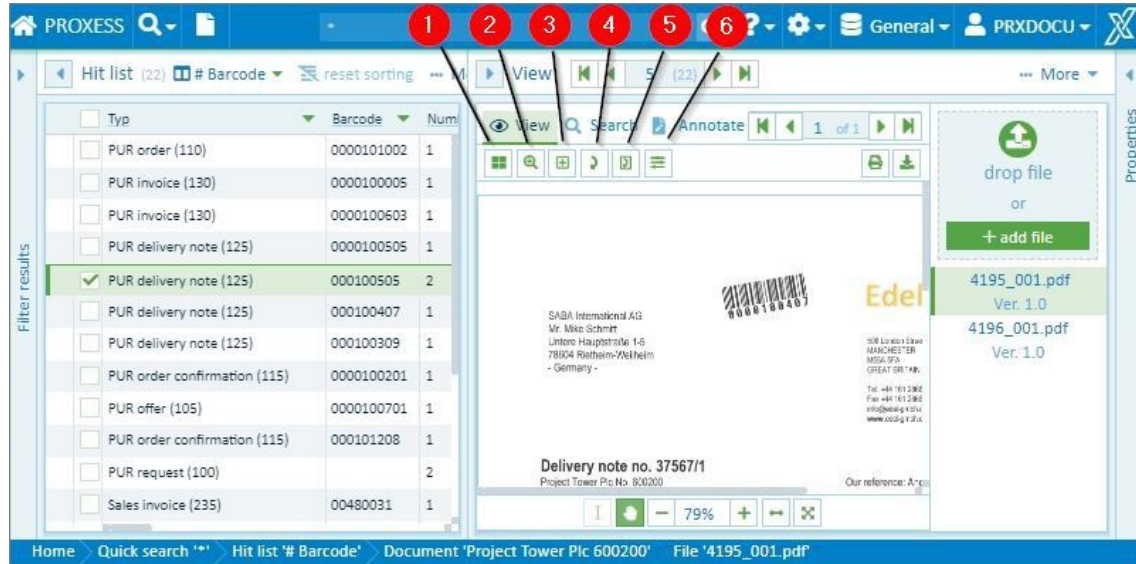








Fig.: File display functions in the viewer

1		Opens thumbnails of the individual pages.
2		Click on the magnifying glass to activate the function. You can freely move the magnifying glass over the file while holding down the mouse button.
3		You can activate the Enlarge area function by clicking on it. Move the cursor to the file area to be enlarged, click the left mouse button and drag it to delineate the size of the area. When you release the mouse button, the selected area will be enlarged.
4		Rotate all pages of a document at once by 90 degrees each.
5		Rotate the current page by 90 degrees.
6		With the image tools , you can use the controls to set the sharpness, gamma value and line widths .

[Go to video tutorial](#)

Show file versions

You can find the file versions in the “Information” section. The version history for the current file is shown under the

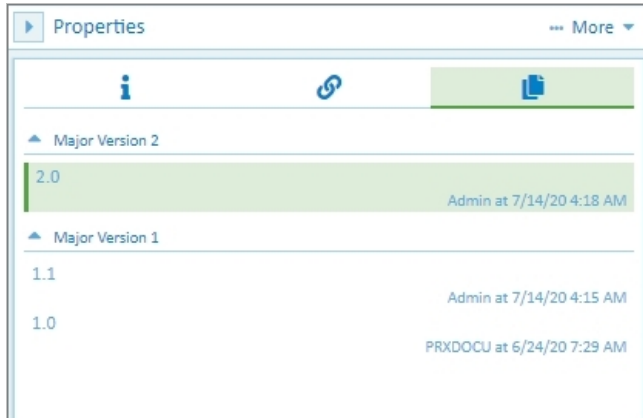


Fig.: Version history of a file

The user and time of the edit are logged in the history. When you open a file, you always initially see the latest version.

Mark an earlier version to show it.

When a file is edited, e.g. with annotations such as a stamp, redaction or comments, a new file version is automatically created when the file is saved.



The original will always be retained as version 1.0 to comply with the legal requirements for lawful archiving.

Also see: [Edit file \(versioning\)](#)

Supported file formats for the viewer

The file display in the PROXESS Web Client supports these file formats:

Document formats	
Adobe Portable Document Format	*.pdf
Microsoft Word format	*.doc , *.dot
Microsoft Word Open XML format	*.docx , *.docm , .dotx , *.dotm
Rich Text Format	*.rtf
Microsoft Excel format	*.xls , *.xlt
Microsoft Excel Open XML format	*.xlsx , *.xlsm , *.xltx , *.xltxm
Microsoft PowerPoint format	*.ppt , *.pot , *.pps
Microsoft PowerPoint Open XML format	*.pptx , *.pptm , *.potx , *.potm , *.ppsx , *.ppsm
Microsoft Visio Drawing format	*.vsd
Microsoft Visio XML Drawing format	*.vsdx , *.vsdm , *.vdx
OpenDocument Text format	*.odt , *.ott , *.fodt
OpenDocument Spreadsheet format	*.ods , *.ots , *.fods
OpenDocument Presentation format	*.odp , *.otp , *.fodp
OpenDocument Math Format	*.odf
OpenDocument Drawing format	*.odg , *.otg * .fodg
Text formats	
Text format	*.txt

Comma-Separated Values	*csv
Email formats	
Microsoft Outlook format	*.msg
Outlook Express E-Mail format	*.msg, *.eml
Web formats	
HyperText Markup Language format	*.html, *.htm
Extensible HyperText Markup Language format	*.xhtml, *.xhtm
Image formats	
Tagged Image File Format	*.tif, *.tiff
JPEG File Interchange	*.jpg, Format *.jpeg
JPEG 2000 file format and Code Stream format	*.jp2, *.jpc
Graphics Interchange Format	*.gif
Portable Network Graphics	*.png
Adobe Photoshop Format	*.psd, *.psb
Microsoft Windows Bitmap Format	*.bmp, *.dib
Macintosh Metafile Format	*.pct, *.p1.c, *.pict
Windows Metafile Format	*.wmf
Enhanced Metafile Format	*.emf
ZSoft Paintbrush PCX Format	*.pcx
ZSoft Paintbrush DCX Format	*.dcx

Sun RasterData Format	*.ras
Kodak Photo CD Format	*.pcd
Truevision Targa Format	*. tga , *.tpic
Continuous Acquisition and Life-cycle Support format	*.cal, *.cals
Icon Resource Format	*.ico
Windows Cursor Format	*.cur
NCR Image Format	*.ncr
X Window Dump Format	*.xwd
Silicon Graphics Image Format	*.sgi
Wireless Bitmap Format	*.wbmp
Scitex color tone Format	*.sct
WordPerfect Graphics Metafile Format	*.wpg
X Bitmap Format	*xpm
Portable bitmap Format	*.pbm
Portable Graymap Format	*.pgm
Portable Pixmap Format	*.ppm
Xerox 9700 Graphic Format	*.img
Dr. Halo format	*.cut
Medical formats	
Digital Imaging & Communication in Medicine format	*.dem , *.dicom , *.dcim , *.dicm

CAD formats	
AutoDesk AutoCAD Format (version 2.5 to 2014)	*.dwg , *.dxf
AutoDesk Design Web Format	*.dwf
MicroStation Drawing format (V7 and VS)	*.dgn

Add file

You can add more files to an already archived document. PROXESS Web Client offers two options for this.

Add file via “Drop Zone”

1. Open the document to which you would like to add a file. You can find the Drop Zone in the document display.
2. Use drag & drop to move your file (e.g. from Windows Explorer) to the **Drop Zone** field.

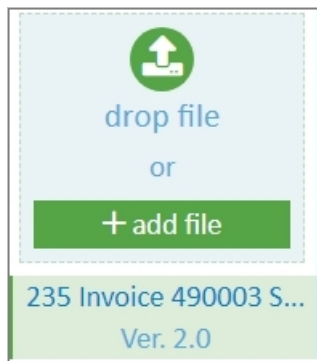


Fig.: Drop Zone

Add file via the “File” menu

1. Open the document to which you would like to add a file.
2. Open the “File” menu in the display window.

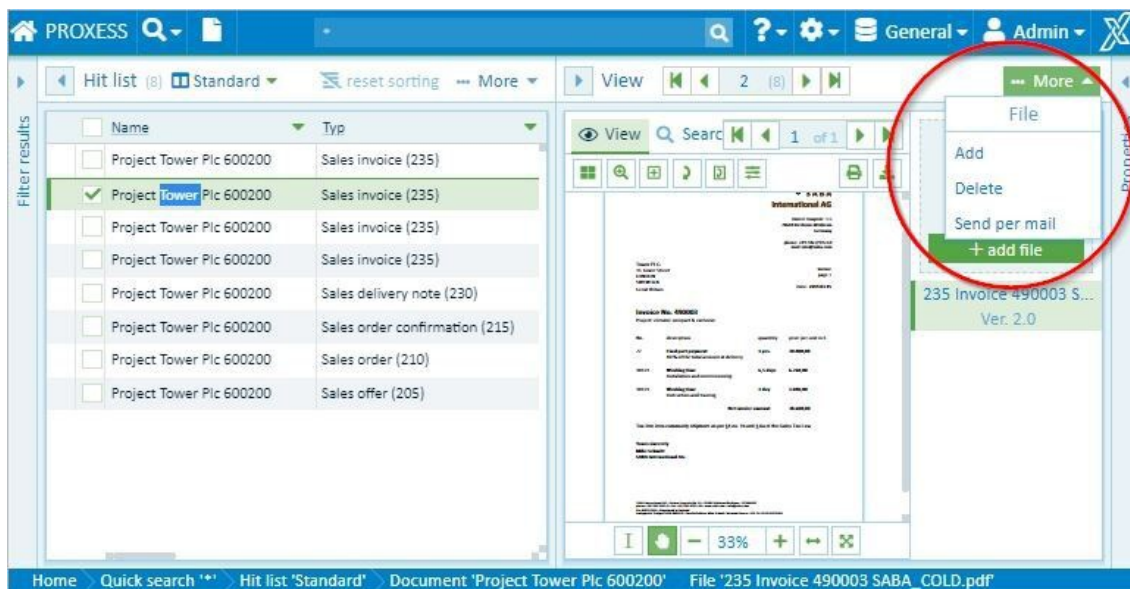


Fig.: File menu

3. Select the **Add** menu item.
4. Now Windows Explorer will open and you can select and add the file.

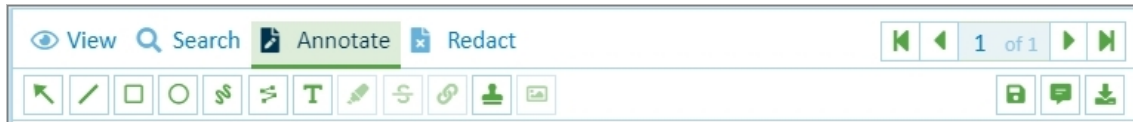
[Go to video tutorial](#)

Add annotations to a file

You can continue editing the displayed file in the file view.

Via the file view, you can find the Viewer's menu bar.

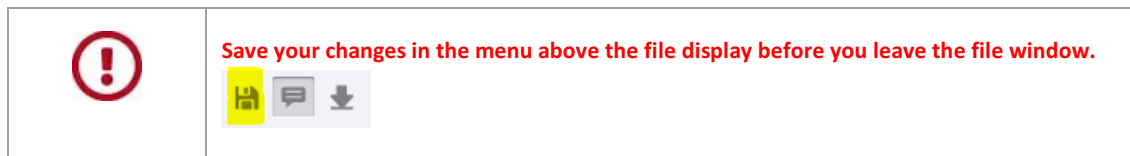
Click the "Annotations" tab and open the associated menu:




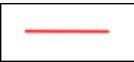

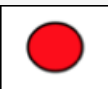
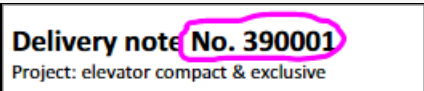
Numerous functions are available:

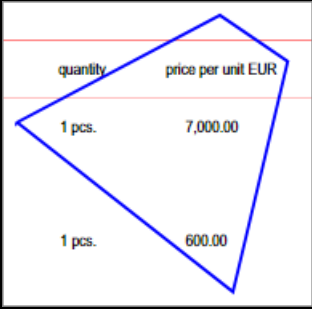

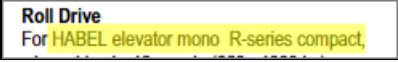
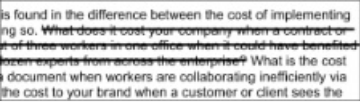






- Arrow
- Line, rectangle, circle
- Free-hand note and line drawing
- Highlighter or "strikethrough text"
- [Link](#)
- [Text annotations](#)
- [Stamp functions](#)

In addition to the annotations, there is the option of adding [redactions](#) to the file.



Button overview with examples:

Name of the button	Description and example
Arrow	
Line	
Rectangle	
Ellipse	
Freehand note	

<p>Line drawing</p>	
<p>Text annotation</p>	
<p>Highlighter</p>	
<p>Strikethrough text</p>	
<p>Link</p>	
<p>Stamp</p>	 <p>You can stamp the document with the text “Confirmed”, “Reviewed” or “Rejected”.</p>
<p>Image stamp</p>	 <p>Additional individual image stamps can be added to the file.</p>
<p>Save annotation</p>	 <p>Here you save your annotations or changes.</p>
<p>Show comment list</p>	 <p>Here you can display or hide the comment list next to the file. In the comment list, you can find the annotations for the comments.</p>
<p>Download file</p>	 <p>Here you can locally download the current file.</p>

Add text annotation to a file

To add a text annotation to a file, select the “Annotations” tab in the menu above the file view.
Click the text icon.

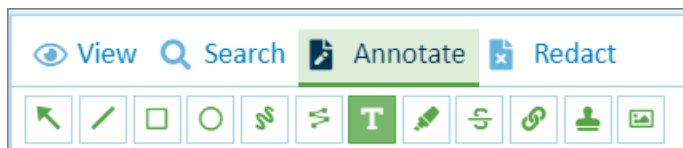


Fig.: File view menu with “Annotations” tab

In the context menu, you can specify the background and border color along with the border width and font formatting for the text.

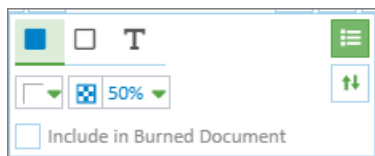


Fig.: “Text annotations” context menu



Include during download: When you activate this option, this stamp is downloaded with the file during the file download as a “selected image stamp” (see Download file).

Now drag the text annotation onto the file with the mouse.

Offer No. 190001
Project: elevator compact & exclusive

Dear Mrs. Aicher,

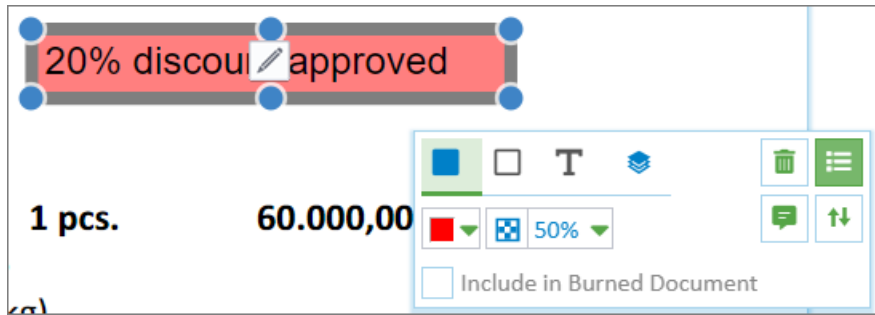
thank you for your request. We are pleased to offer you following products:

No.	description	quantity	price per unit in €
10118	elevator compact PROXESS elevator mono R-series compact, wire cable, 4 - 13 people (320 - 1000 kg), speed: 1,0 m/s, maximum stations: 12 delivery date: 28/03/12	1 pcs.	17.000,00
10120	elevator exclusive	1 pcs.	60.000,00

Fig.: File with text annotation

Select, edit or delete text annotation

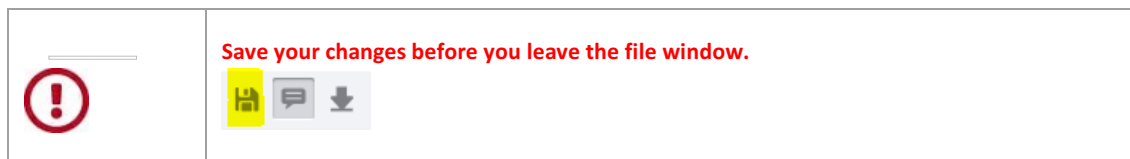
Click the annotation. The context menu opens for editing.



By dragging with the mouse, you can change the size and position of the annotation.
Click the pencil to edit the text.

You can change the formatting of the font, border, background color and transparency of the text annotation via the context menu.

Color and border color	Select the background color, border color and border width via the first two icons.
Format text	You can format the text via the text icon.
Level order	Specify the order of the levels if multiple annotations or redactions were added above each other.
Comment function	Just as in every annotation, you can add a comment via the comment icon.
Delete redaction	Use the recycling bin icon to delete the text annotation.



Link to file

You can highlight an area in a file and insert a link there.

To insert a link in a file, select the “Annotations” tab in the menu above the file view.
Click the link icon.

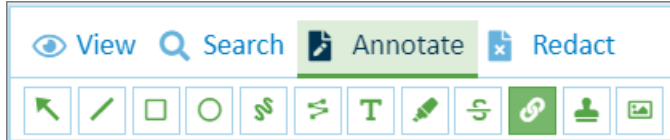


Fig.: File view menu with “Annotations” tab

In the context menu, select the desired color to highlight the link.

Now drag the mouse over the area to be highlighted.
You can highlight a text or select an existing highlight with a click.

Enter the target address for the link in the context menu.

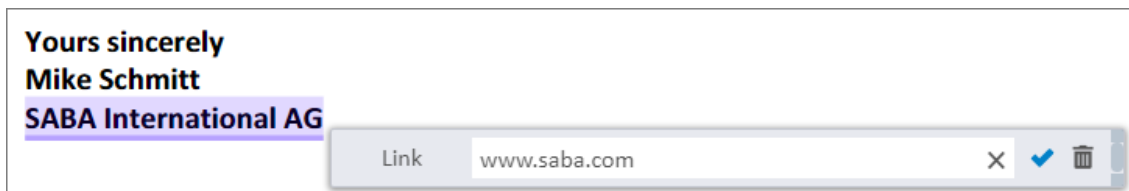
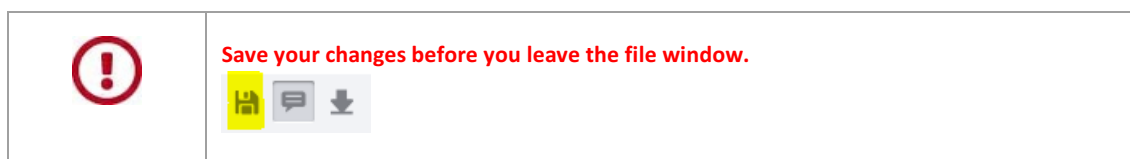


Fig.: Highlight in file with associated link

You can delete the link again with the recycling bin icon.



Add image stamp to file

You can select individual image stamps and add them in any place in the current file.

You can find image stamps in the **Annotations** tab above the file view.

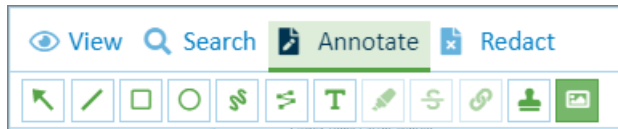


Fig.: "Annotations" view

Add new image stamp

In the menu, click the "image stamp" icon and then again on the displayed stamp:

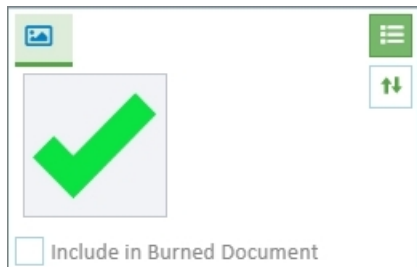
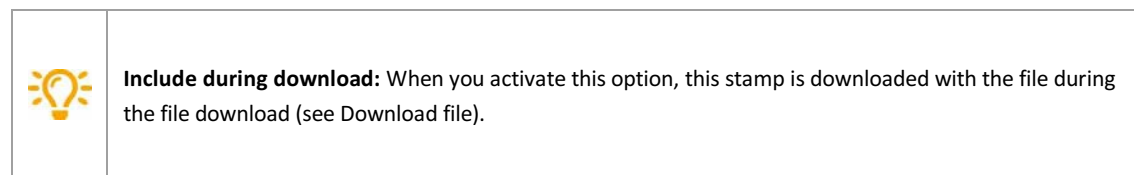


Fig.: Image stamp menu



Now select an image stamp

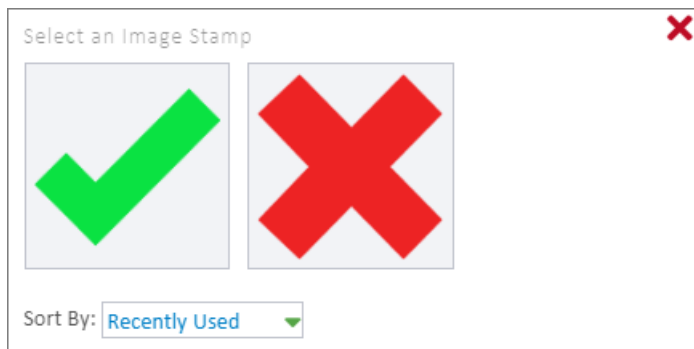


Fig.: Dialog box "Select image stamp"

Highlight a section of the file by dragging with the mouse. As soon as you release the mouse, the stamp is inserted. This enables you to add multiple stamps in succession (see image).

Purchase order Nr. B001338

Tel: 02 21 / 23 56-78
Fax: 02 21 / 23 56-43
Date: 16.09.2019

Dear Sir or Madam,

we would like to order the requested items as following:

Pos.	Item	pcs.	Price per item
1	10029 Alloy pipe	5	€ 35.00
2	10218 Gasket	187	€ 1.10
			€ 730.70


We expect delivery as soon as possible.

Thank you.

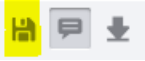
Best regards



Fig.: Sample file with image stamps



Save your changes in the menu above the file display before you leave the file window.



Select, edit or delete image stamp

Click an image stamp in the file to select and edit it.

Alternatively, the edit window can also be accessed as a “floating context menu” near the image stamp.

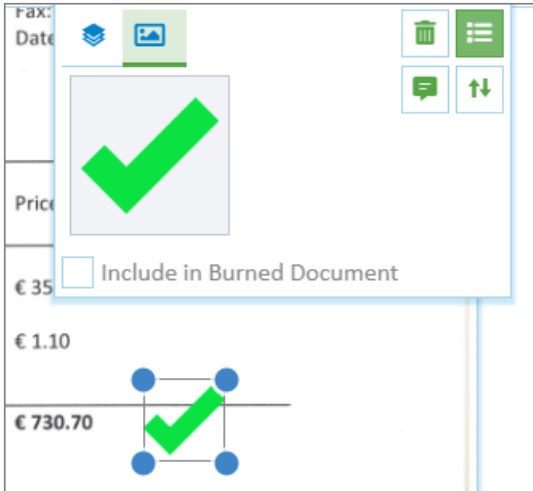






Fig.: Select and edit image stamp

Via drag and drop and dragging with the mouse, you can change the size and position of the image stamp.

You can delete the selected stamp with the “recycling bin” icon.




Save your changes here too before you leave the file window.

Add comment to image stamp

With the "Comment" symbol in the menu above the file, you can display and hide the comment list.

 View
 Search
 Annotate
 Redact



1 of 1














Here you can add text annotations to the stamp. You can also edit the text annotations, add further entries to them or delete them.



polyREM
Polymer Technology

SABA International AG
Untere Hauptstrasse 1-5
z.Hd. Christine Schmitt
78604 Rietheim-Weilheim

Purchase order Nr. B001338

Dear Sir or Madam,

we would like to order the requested items as following:

Pos.	Item	pcs.	Price per Item
1	10029 Alloy pipe	5	€ 35.00
2	10218 Gasket	187	€ 1.10
			€ 730.70

We expect delivery as soon as possible.

Thank you.


Best regards



polyREM Inc.

Lindsey Brighton
Lindsey Brighton

Unser Zeichen: LIB

Tel: 02 21 / 23 56-78
Fax: 02 21 / 23 56-43
Date: 16.09.2019



Include in Burned Document

Delivery will be possible in December 2019


07/17/2020 12:56am PRXDOCU

Call Lindsey --> This is OK




07/17/2020 12:58am PRXDOCU

Reply...

Fig.: Selected image stamp with comment



Save your changes before you leave the file window.

Add redactions to a file

You can redact sections or entire pages of a file and thus make them invisible to the user. In contrast to the colored annotation that you place above a text area, the redacted text passages cannot be made visible again by PDF viewers via copy and paste.

In the menu above the file, click the “Redactions” tab and open the associated menu.

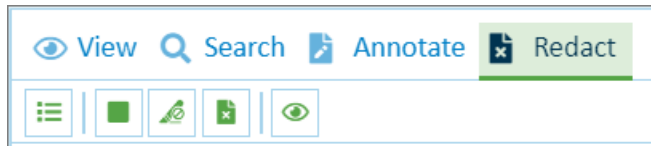


Fig.: “Redactions” menu

Add, edit and delete the partial redaction

Click the color icon in the menu.

Use drag and drop to highlight the part of the page that should be redacted.

A context menu appears:

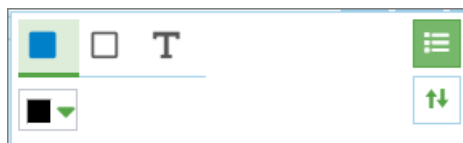


Fig.: Context menu “Edit redaction”


Color and border color	Select the background color and border color via the first two icons.
Level order	Specify the order of the levels if multiple annotations or redactions were added above each other.
Comment function	Just as in every annotation, you can also add a comment via the comment icon.
Delete redaction	Use the recycling bin icon to delete the redaction.

Redact text

First click the icon “Redact text”.

Now drag the mouse over the text that should be redacted.

Redact entire page(s)

Click the icon "Redact entire page"  .

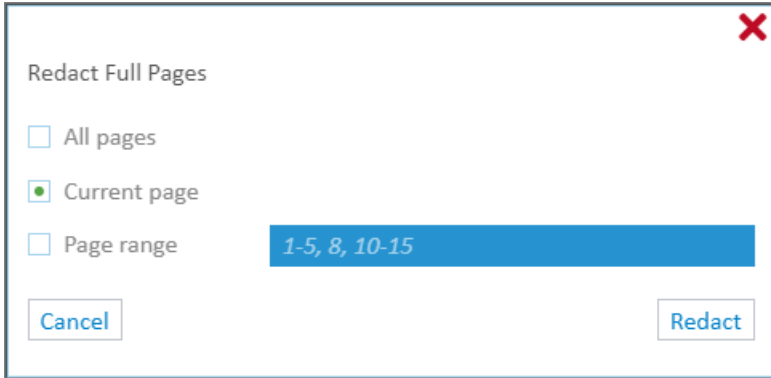


Fig.: Dialog "Redact entire page"

Now you can redact the current page, individual pages or all pages.

Specify level order of annotations and redactions





You can specify the order of the levels if multiple annotations or redactions are positioned above each other. Select an annotation or redaction and the edit window will appear automatically.

Select the level order tab.



Fig.: Edit dialog for annotations and redactions

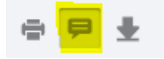
Move the level of the selected annotation or redaction here:

	Annotation or redaction in front
	Move annotation or redaction one level towards front
	Move annotation or redaction one level towards back
	Annotation or redaction in back

Comments on annotations

Comments can be added to annotations or redactions.

First display the comment list via the comment icon, which is on the top right in the file view:



Now all comments for the file are shown.

Tower PLC. 15 Tower Street LONDON SW1W 6LB Great Britain		Delivery note page 1 Date: 2019-02-28	
Delivery note No. 390001 Project: elevator compact & exclusive			Sample comment ☰ 07/15/2020 06:20am PRXDOCU
No.	description	quantity	
10118	elevator compact PROXESS elevator mono R-series compact, wire cable, 4 - 13 people (320 - 1000 kg), speed: 1,0 m/s, maximum stations: 12 delivery date: 28/03/12	1 pcs.	
10120	elevator exclusive PROXESS elevator mono R-series exklusive Wire cable, 6 - 26 people (maximum 2000kg), speed: 2,5 m/s, maximum stations: 24 Delivery date: 28/03/12	1 pcs.	

Fig.: File view with displayed comment list

You can create, edit and delete comments or add chronological notes. Each comment receives a time stamp.

Versioning of a file

If a file is uploaded to a document with an **identical file name** or archived via drag & drop (see [add file](#)), the following dialog appears:

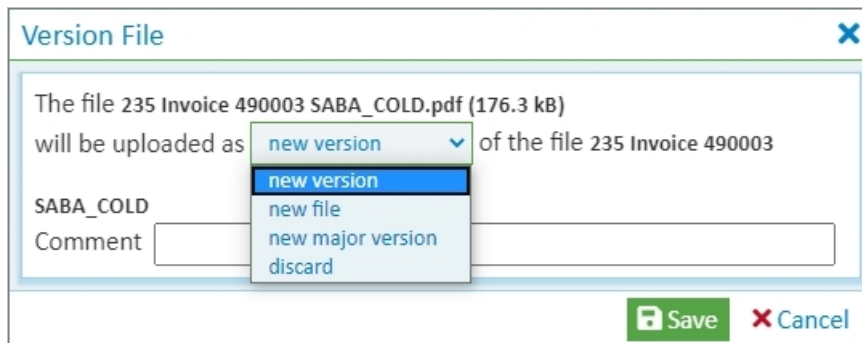



Fig.: Selection dialog for new file version

The dialog offers the following options:

New version	The new file is archived as a new file sub-version (e.g. version 1.2).
New file	The file is archived as an additional new file in the document.
New main version	The file is archived as a new main version (e.g. version 2.0).
Discard	The file will not be archived.
Comment	A comment for the new file version is archived.
Save/cancel	Save your entries or exit from the dialog without archiving the file.

Print file

1. Open the desired document and the file to be printed in the display of the PROXESS Web Client.
2. You can open the print dialog with the print icon in the file display .

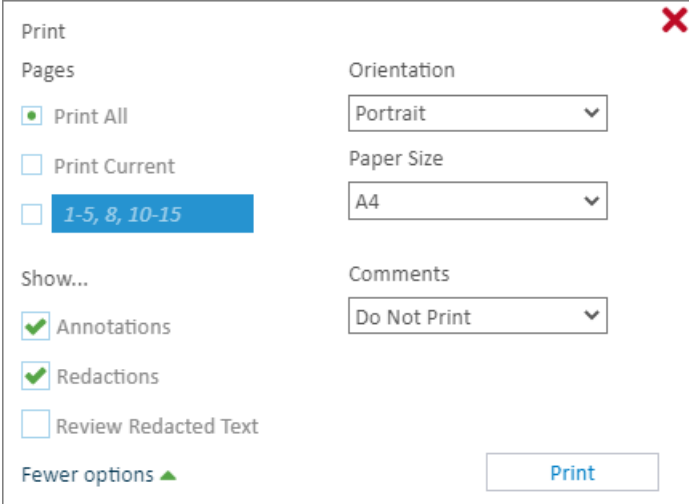
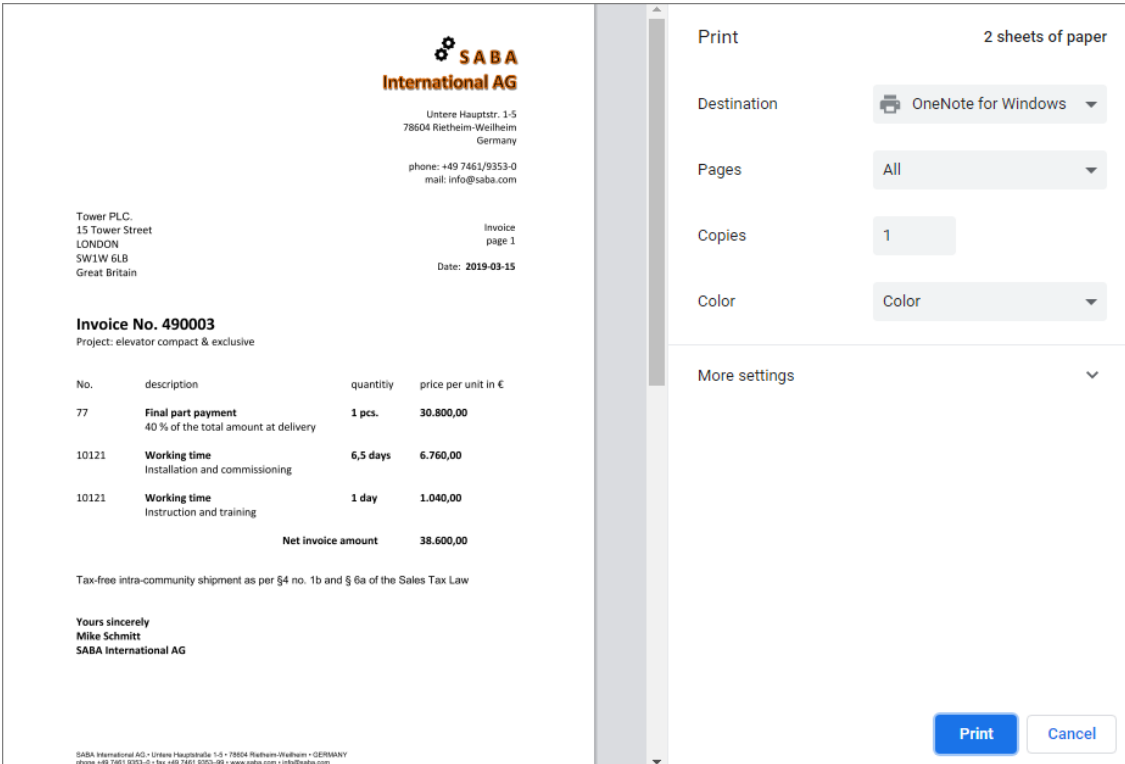


Fig.: Print dialog in the PROXESS Web Client viewer

3. Select all pages, the current page or individual pages to be printed.
4. Set the orientation for the print (portrait or landscape format) and the paper format (e.g. A4). Select the **Print** command.
5. The print preview dialog opens:



No.	description	quantity	price per unit in €
77	Final part payment 40 % of the total amount at delivery	1 pcs.	30.800,00
10121	Working time Installation and commissioning	6,5 days	6.760,00
10121	Working time Instruction and training	1 day	1.040,00
Net invoice amount			38.600,00

Fig.: Print preview dialog

6. Review the print settings and select the **Print** command.

Download file

1. Open the desired document and the file to be downloaded in the display of the PROXESS Web Client.
2. Click the download symbol in the title bar of the viewer .
3. You can choose if you want to download the original format or a PDF file.
4. You can choose if you want to download the file with or without annotations and redactions. For the annotations, you also have the option to only download selected annotations. To do this, select individual annotations and confirm the option "Include during download".
5. Select **Download**.

Now the file is downloaded to your local download directory.

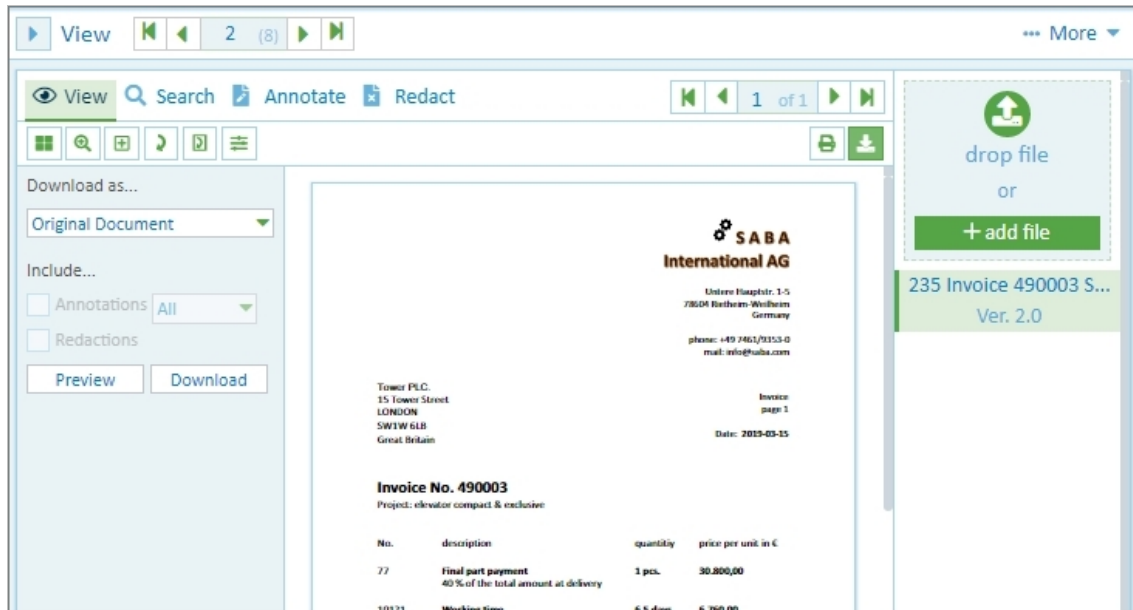


Fig.: File download

Delete file

If a file is no longer needed, you can delete it with the PROXESS Web Client.

Step by step:

1. Open the menu in the “Display” area and select the **Delete** menu item.

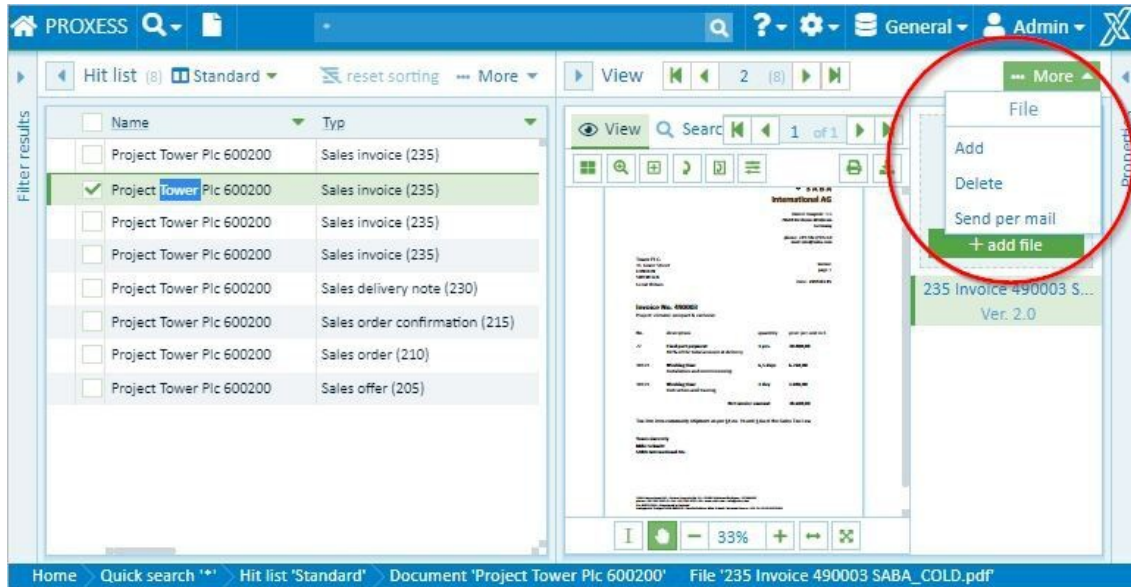


Fig.: File menu

This calls up a security notice asking whether you really want to delete the file.

2. If you select **Cancel**, the file is retained. If you select **OK**, the file is deleted.



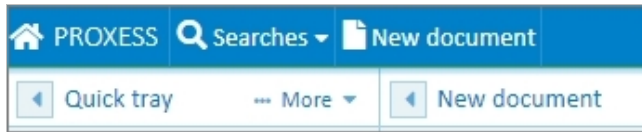
You can only delete files if the system administrator has assigned deletion rights to you. These rights depend on the document type. You may be allowed, for example, to delete files from documents of the “Correspondence” type but not files from the “Outgoing invoices” type. In practical experience, deletion rights are rarely assigned in an archive, if at all.

In compliance with legal provisions, the files are not deleted permanently, they are just deleted from the user display.

Create new document

To archive documents manually, select the **New document function**.

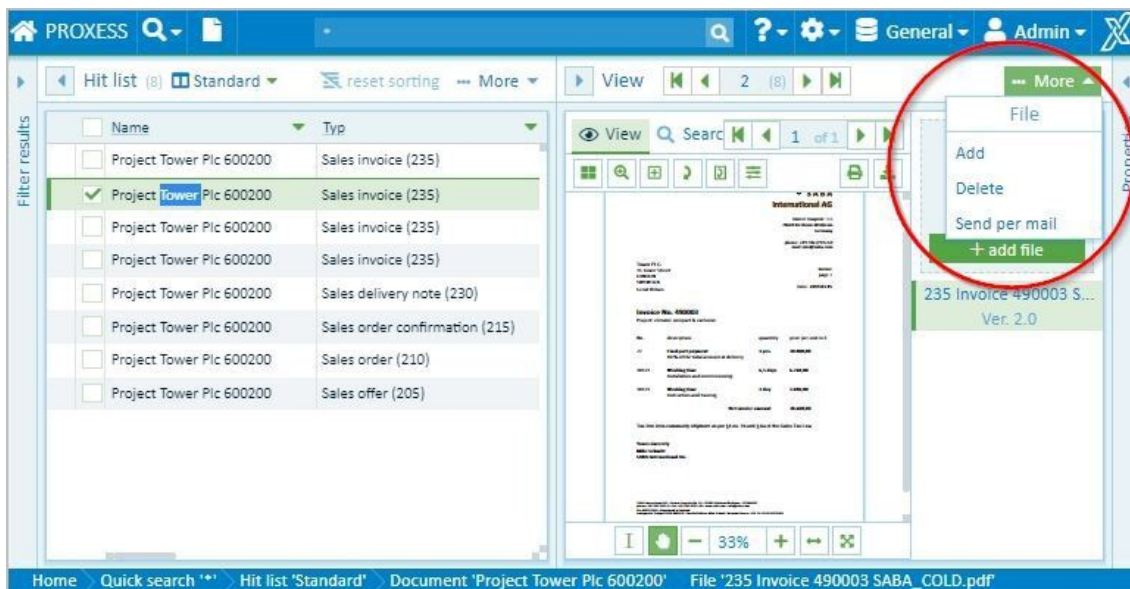
You can find the **New document** function in the dialog box on the home page or in the main PROXESS menu.



Click the **New document** function. A blank document will open. You can now upload and add one file or multiple files simultaneously or in succession.

Adding files is possible:

- By using drag and drop to drag the file(s) into the drop zone
- With the **Add file** command, which opens the Explorer window to select the file(s) there



The file name of the (first) uploaded file is automatically suggested as the document name for the new document.

All uploaded files are archived together in this document. They receive the same document information and are always shown as one hit in the hitlist.

Now enter the **Index values** into the fields in the New document area. The document will be stored in the archive according to these values and can be found again later. Mandatory fields receive a colored highlight and must be filled before you can create the document in the archive.

At the bottom of the "New document" window area, select the command **Create document** to store the document and its description in the archive:

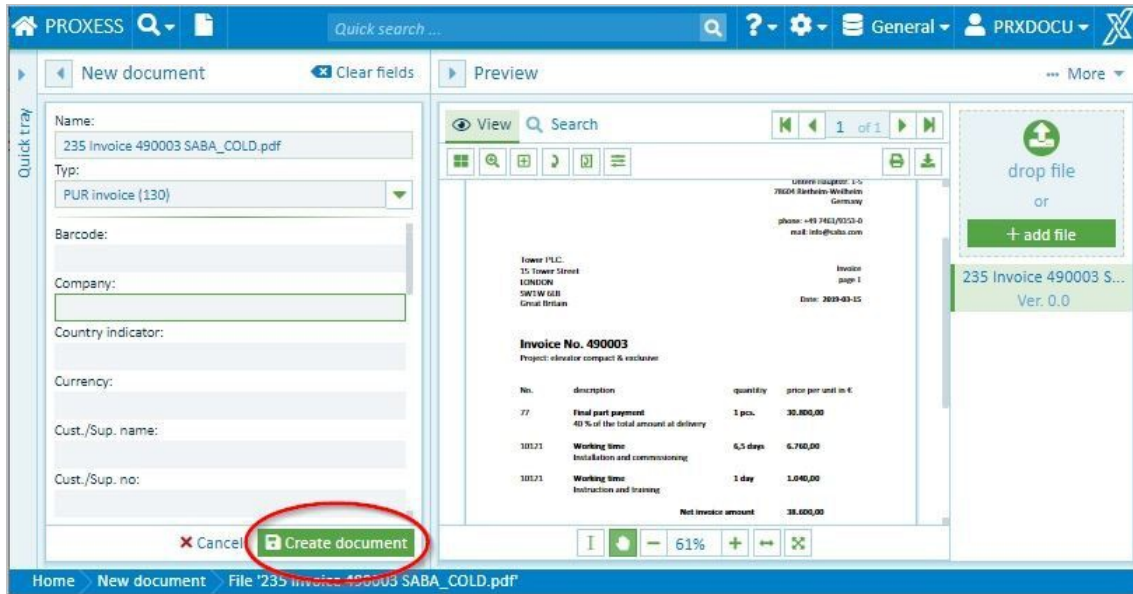



Fig.: Create new document

	<p>It is also possible to fill in the fields first and then add the file(s).</p>
---	--

What is a quick tray?

Quick trays are predefined tray scenarios that can help you to archive documents more quickly and easily.

Quick trays contain:

- A certain selection of fields
- A stored document type (optional)
- Already pre-allocated fields (optional)

Quick trays can:

- Be specified by the administrator
- Be individually created by the user
- Be marked as an individual favorite by the user

Also see:

[How do I set up a quick tray?](#)

[Create a new document with the quick tray](#)

File a document with the quick tray

There are three different options.

First option

In the main menu, select the menu item **New document**.

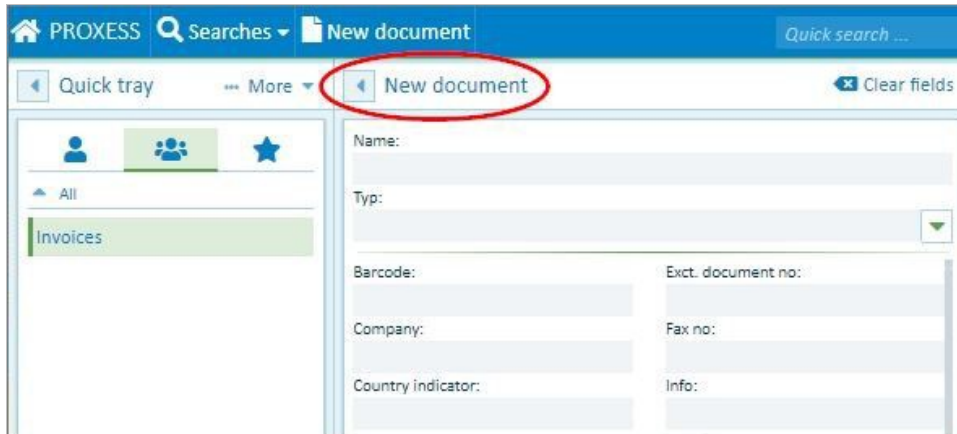


Fig.: PROXESS Web Client main menu

Your quick trays are located in the three tabs:

- Own tray: These are trays that you have created for your personal user profile.
- Inherited trays: These are trays that the administrator has created for a user group in which you are a member.
- Favorites: Here you can create your personal list of favorites from the first two groups.

Now select a quick tray in one of the tabs:

Second option

Select the displayed quick tray directly from the start page. Your standard tray is always displayed (here: Invoices). You can specify your standard tray under [Settings](#).

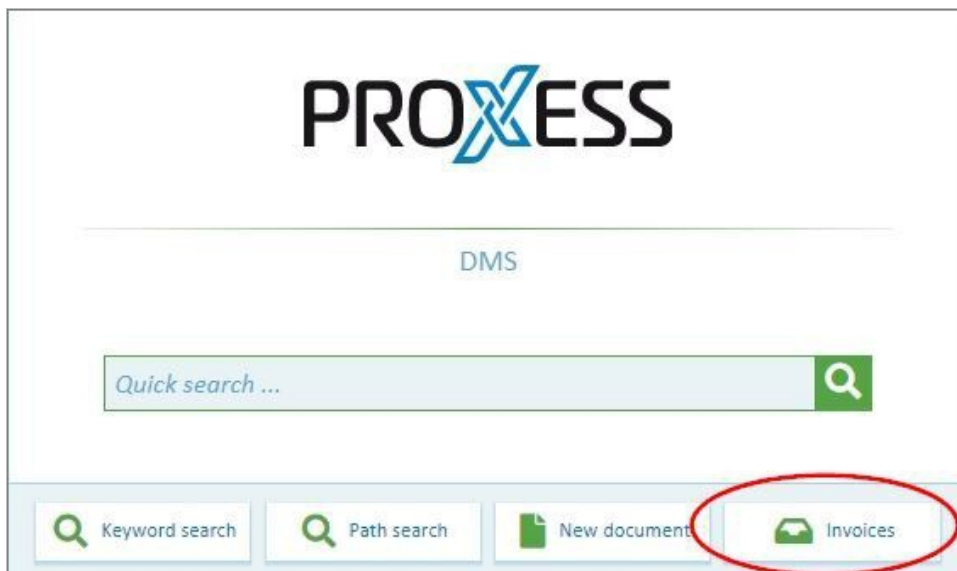


Fig.: Home

Third option

Alternatively, you can drag and drop one or more files onto the symbol of the displayed quick tray. The appropriate dialog for the new document creation opens automatically.

Tip



In the [user settings](#), you can specify whether a quick tray—and if yes, which one—is displayed as the standard quick tray on the home page.

In the dialog for the creation of a new document, you can now add the file(s) and then fill in the fields or the other way around.

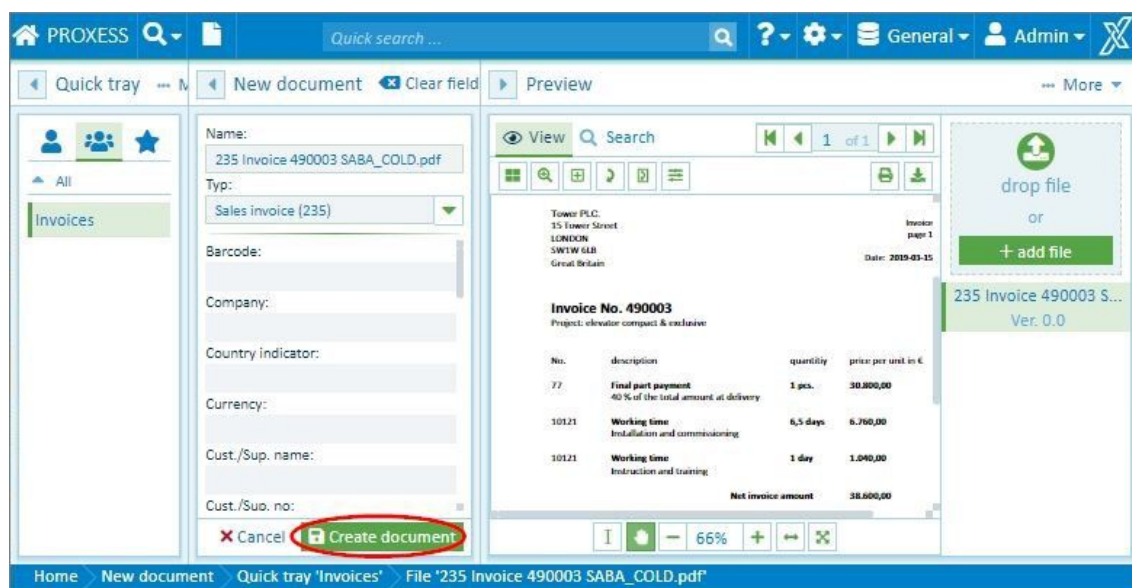


Fig.: New document creation with the quick tray "Invoices"

Save the document via the button **Create document**.

How do I set up a quick tray?

Quick trays are predefined tray scenarios that help you to archive documents more quickly and easily.

Step by step:

1. To create a new quick tray, select the menu item **New document** in the main menu:
2. Open the “Quick tray” area of the window in the “More...” menu and click the **New** command.
3. Select a name for the new quick tray.
4. Configure your quick tray. You have these options:
 - Use the “Eye” symbol to display or hide fields
 - Pre-fill fields, which already specifies/suggests the field contents
 - Suggest document type
 - Change the name of the quick tray

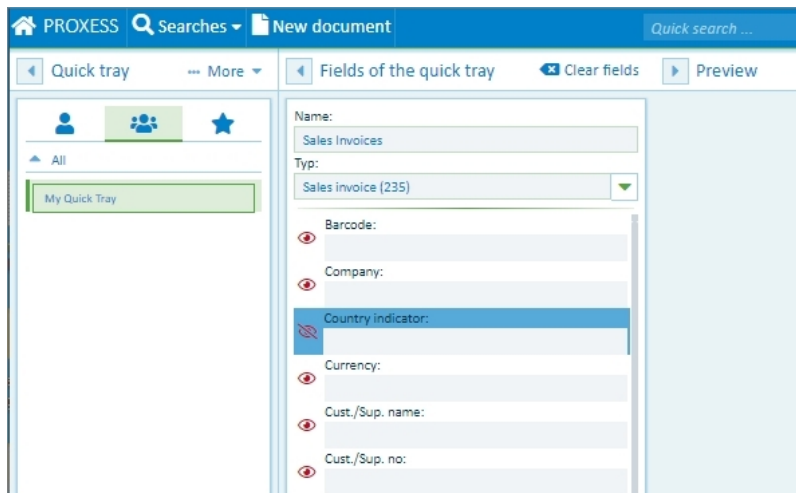


Fig.: Configuration of a quick tray

5. Save your work with the **Save quick tray** button.

Digression: Set up a layout for the hitlist for user groups (only for administrators)

As an administrator, you can also save the created quick trays as a global template for PROXESS user groups.

For this purpose, create a quick tray as described above and then select the **Save as** command in the “Quick tray” menu.

Enter a name for the quick tray and assign this to a PROXESS user group.

Set quick tray as favorite

Quick trays are predefined tray scenarios that can help you to archive documents more quickly and easily.

You can create a list of your own favorites from the personal quick trays and preset group quick trays.

Then this list is shown under the “Favorites” tab.

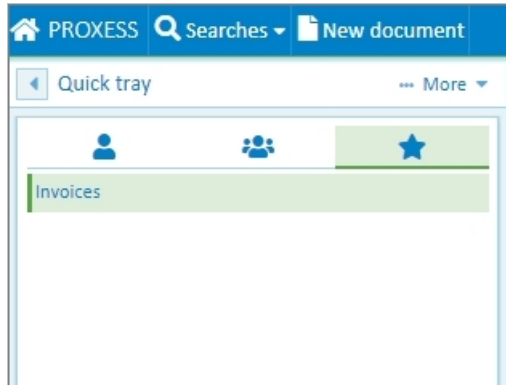


Fig.: Grouping of the quick trays

To save a quick tray as a favorite, first select the quick tray.

Then open the “Quick tray” area of the window in the “More...” menu and click the **Set favorite** command.

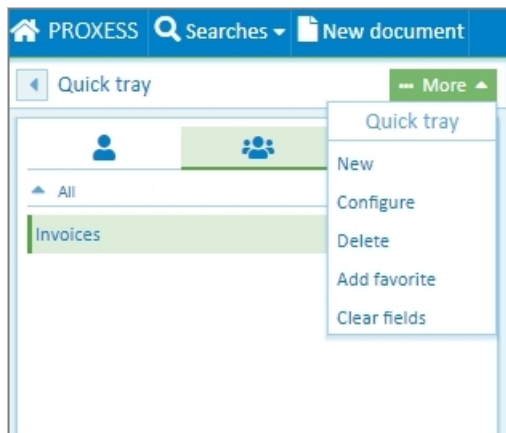


Fig.: Set quick tray as favorite


To remove the quick tray from the “Favorites” tab again, mark the quick tray in the “Favorites” tab and open the “More...” menu.

Now select the menu item **Remove favorite**.

Enter date

When you enter the date, you can enter each date completely. You are also supported by a few functions in the date fields. You can use the functions when you search as well as during the document creation or the editing of document fields.

Entry via mouse click with calendar wizard:

You can open the calendar with this symbol  next to a date field:

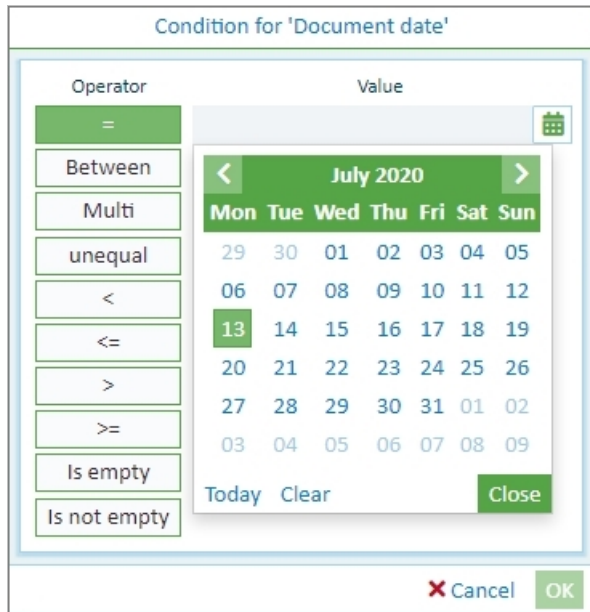


Fig.: Calendar wizard

Via shortcut commands:

- The period “.” stands for today (e.g. 6/25/2020)
- The minus sign “-” stands for yesterday
- The plus sign “+” stands for tomorrow
- The double minus sign “--” stands for the day before yesterday
- The double plus sign “++” stands for the day after tomorrow, etc.
- The signs “+1”, “+2”, “+3”, “-1”, “-2”, “-3”, etc. stand for today + 1, 2, 3 / - 1, 2, 3 days (It is possible to write outside the month or year limit of a field; e.g. the sign “+100” stands for today + 100 days).
- The signs “1+”, “2+”, “3+” etc. stand for the 1st, 2nd, 3rd day of the current month.

Entry on the number pad:

If you enter the date on the number pad of the keyboard, all commas are replaced by periods after confirming with Enter/Tab.

Example: Writing 05,26,2020 results in the date 05.26.2020.

Edit information about the document

Information about the document can also be supplemented or edited after archiving. This requires the corresponding user rights. Since the user rights in PROXESS are linked to the document type, it is possible that you are unable to edit information e.g. about outgoing invoices but can edit information about the “Correspondence” document type.

Step by step:

1. Open the **More** menu in the “Information” area
2. Select the **Edit document** menu item.

Now you can edit the fields. The fields are depicted on different pages.



The document type cannot be changed, as the PROXESS access rights are linked to the document type.

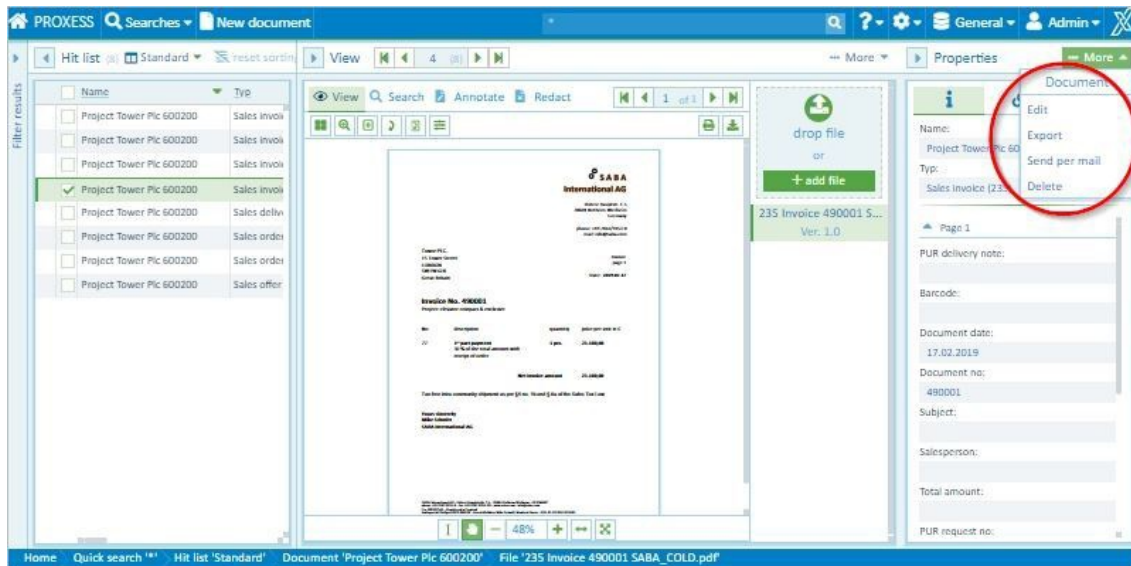


Fig.: Information about the document (editing mode)

3. Now enter additional information or edit the displayed keywords.
4. To accept the changes, select **Save** in the **Information** section at the bottom.

PUR request no:
1234567

PUR order no:

E-Mail:

Fax no:

Currency:
EUR

▼ Page 2

▼ Page 3

With **Cancel**, you can discard your edits and entries.

[Go to video tutorial](#)

Delete document

If a document is no longer needed, you can delete it with the PROXESS Web Client.



When you delete a document, all files in the document are deleted. If you only want to delete a single file, select the [delete function in the "File" menu](#).

Step by step:

1. To delete a document, open the document menu in the "Information" area and select the **Delete** menu item.

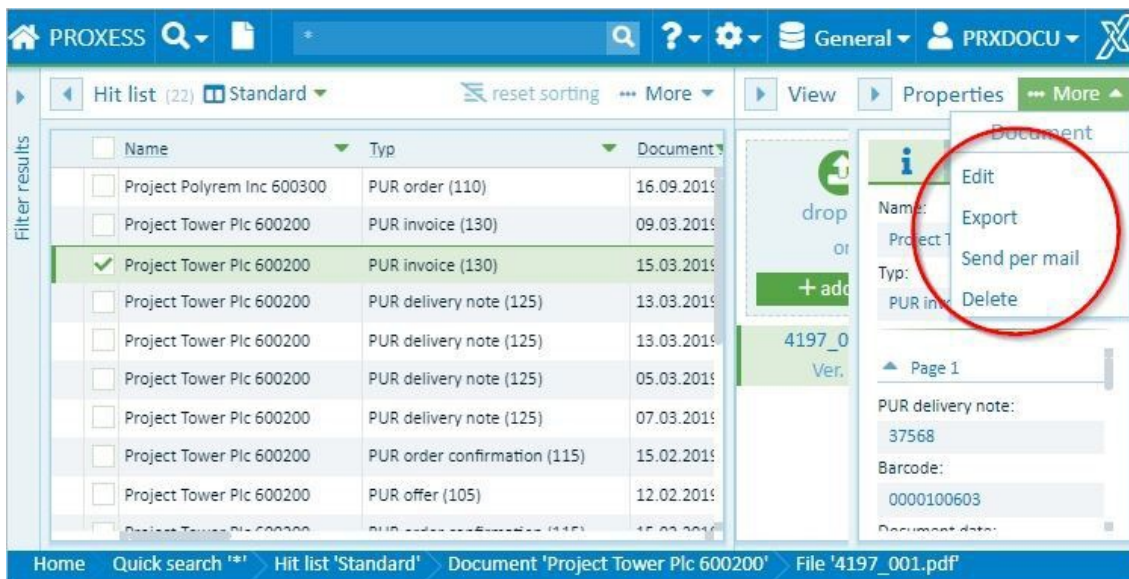


Fig.: "Document" menu in the information area

2. An information window appears. Select **OK** to confirm that you really want to delete the document.

If you select **Cancel**, the document will not be deleted.



You can only delete documents if the system administrator has assigned deletion rights to you. These rights depend on the document type. You may be allowed, for example, to delete documents of the "Correspondence" type but not documents of the "Outgoing invoices" type. In practical experience, deletion rights are rarely assigned in an archive, if at all.

In compliance with legal provisions, the documents are not deleted permanently, they are just deleted from the user display.

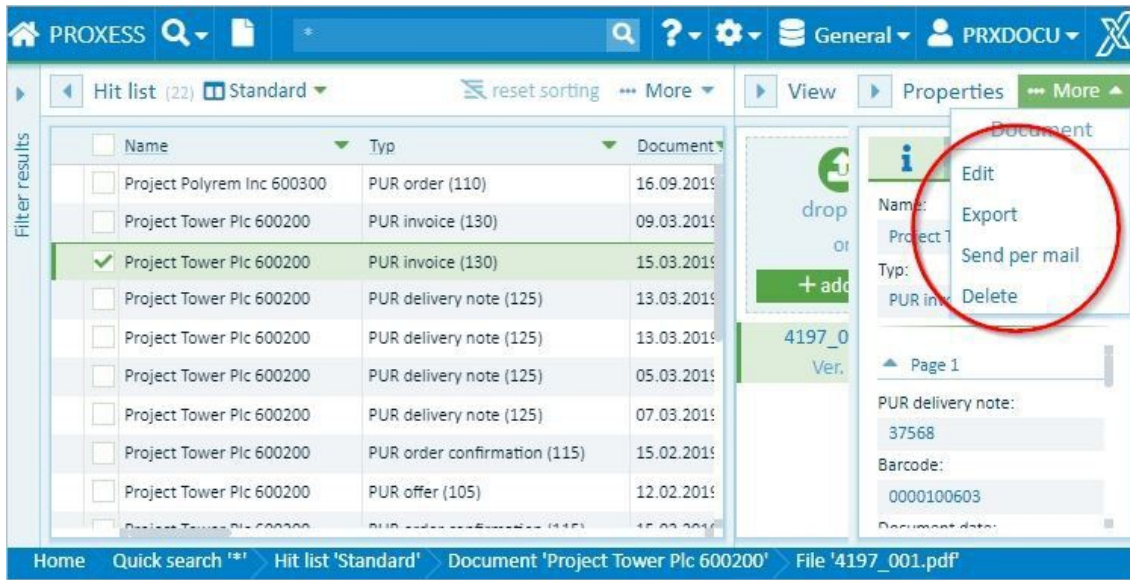
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Download document

You can download documents from the archive and save them on your local end device.

Step by step:

1. Select and display the desired document in the hitlist.
2. Open the menu in the "Information" area and select **Download**.



All files in the document are automatically downloaded as ZIP files to your local download directory.

All files are downloaded in the original format so you can edit them.

Here you can see how you can [download several documents simultaneously](#) in the hitlist.

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Download multiple documents

In the layout for the hitlist, you can export individual or multiple documents from the archive and download them to your local end device.

Step by step:

1. First you have to mark the documents you want to download in the hitlist.

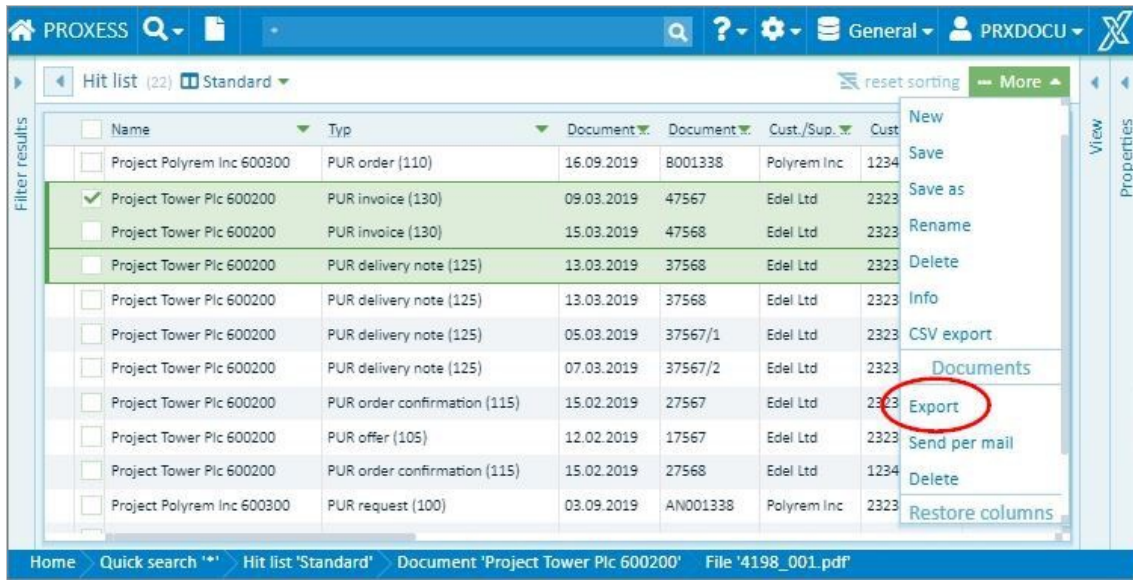


Fig.: Hitlist with marked documents

You can mark multiple documents at once. To do this, click on the first column of each hit (while keeping the SHIFT key or the CTRL key pressed).

Marked documents are highlighted in green and a blue check mark appears at the start of the line.

2. Open the hitlist menu and select **Download**.

The documents are downloaded automatically in a joint ZIP file. In this file, a folder is created for each hit, i.e. for each document, in which the file or files of the document are stored in their original format.

You can also save individual opened documents locally with the [Export document](#) menu.

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Send file by email

You can send one or multiple files simultaneously by email.

First option: Sending files with the local email program (email)

In this standard version for sending an email, you use your locally installed email program. All conventional email programs that can process eml files are supported. After sending it, you can find the sent email in your local email folder under "Sent items".

Step by step:

1. Select the desired file in the hitlist.
2. Now open the file menu in the "View" area with the  symbol.
3. Select the **Send email** menu item.
4. In the dialog box for sending an email, select the **Email** tab.

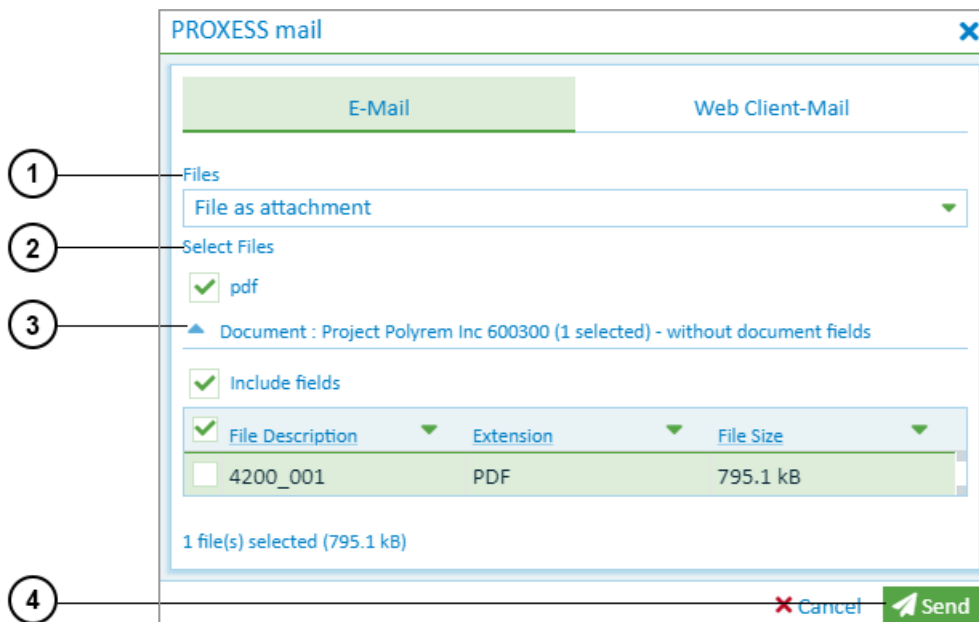
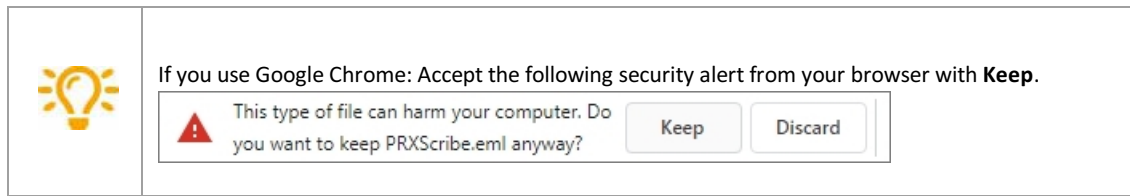


Fig.: Dialog box for sending an email

1	Files as attachment	An eml file is generated with files and potentially with document fields. This is suitable for sending an email to external parties such as customers, suppliers, etc. without access to your own archive.
2	Document as link	An eml file is created with a link (URL). This is suitable for sending an email to employees and colleagues at your own company who have access to the archive.
3	Select files	Files can be selected according to the file type or individually by expanding the list.

4	Send document fields	Place a check mark next to Send document fields to add the entered document information to the email message. If you have marked multiple documents, all field contents are inserted into the email in succession.
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Select the **Send** command.




Open the eml file at the lower edge of the image.

Now you can process the created email with your local email program and send it.

Second option: Sending documents via the PROXESS Web Client server (Web Client mail)

You can also send documents and files centrally by email via the PROXESS Web Client server.

Step by step:

1. Select the desired document in the hitlist. You can mark multiple documents at once. To do this, click on the first column of each hit (while keeping the SHIFT key or the CTRL key pressed). Marked documents are highlighted in green and a blue check mark appears at the start of the line.
2. Now open the document menu in the "Information" area with the  symbol.
3. Select the **Send email** menu item.

The dialog box for sending an email opens. Switch to the **Web Client mail** tab.

Fig.: Dialog box for sending an email with Web Client mail

4. Enter the recipient's email address, including CC and BCC if needed.
5. Enter the subject.
6. Create a message to make it easier for the recipient to allocate your email.

1	Files as attachment	<p>An email file is generated with files and potentially with document fields as an attachment.</p> <p>This is suitable for sending an email to external parties such as customers, suppliers, etc. without access to your own archive.</p>
2	Document as link	<p>A message with a hyperlink (URL) is created. If you send a hyperlink, the recipient should be able to access the PROXESS archive. For that reason, this type of sending an email is suitable for emails to colleagues at the same company.</p>
3	Select files	<p>Files can be selected according to the file type. Alternatively, you can select files by expanding the list and adding an individual check mark to each one you want to send.</p>
4	Send document fields	<p>Place a check mark next to Send document fields to add the entered document information to the email message. If you have marked multiple documents, all field contents are inserted into the email in succession.</p>

Select **Send**. Now PROXESS Web Client automatically sends your email.



Enter your own email address in the BCC field. Then you can find sent emails again in your local email program. You can set a default BCC address in the settings.

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Send document by email

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Step by step:

1. Select the desired document in the hitlist. You can mark multiple documents at once. To do this, click on the first column of each hit (while keeping the SHIFT key or the CTRL key pressed). Marked documents are highlighted in green and a blue check mark appears at the start of the line.
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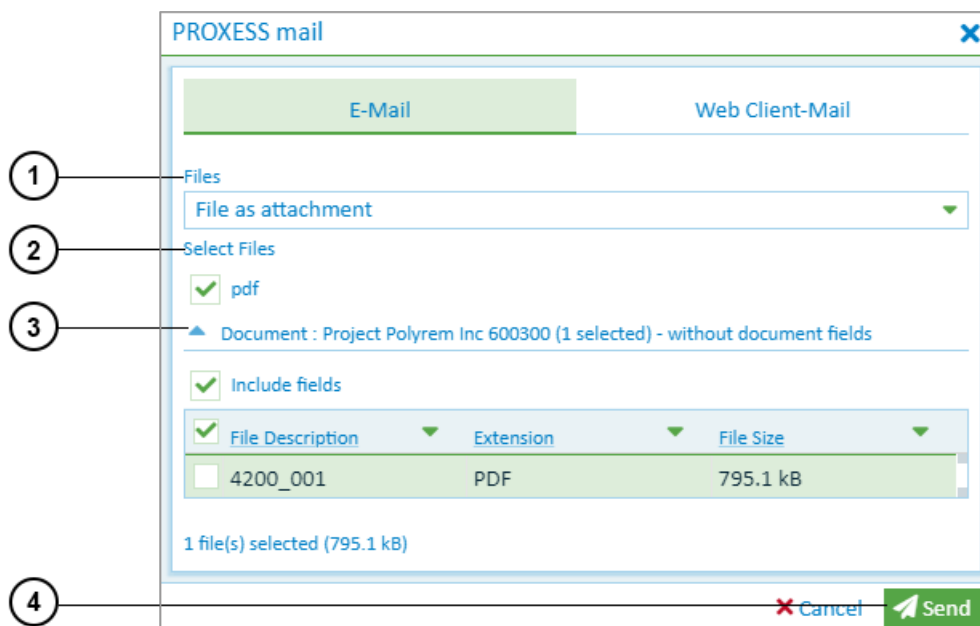
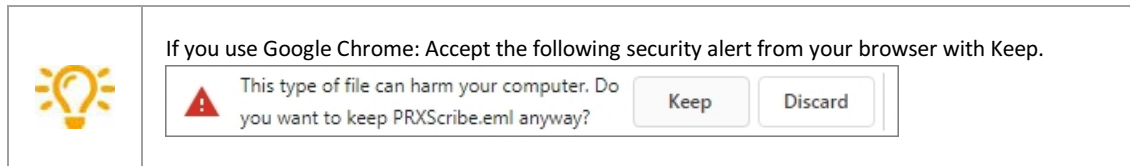


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6. **Open the eml file** at the lower edge of the image.
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7. Create a message to make it easier for the recipient to allocate your email.

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8. Select **Send**. Now PROXESS Web Client automatically sends your email.

	<p>Enter your own email address in the BCC field. Then you can find sent emails again in your local email program. You can set a default BCC address in the settings.</p>
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