DOCUMENTATION
PROXESS MANAGEMENT CONSOLE

Status: PROXESS 10

Release 2022 R1

Table of contents

Copyright notice, disclaimer

PROXESS has made every effort to guarantee the completeness, accuracy and timeliness of the information contained in this document. We reserve the right to make changes to this document without notice. PROXESS does not assume any liability for technical defects in this documentation. Furthermore, PROXESS does not assume liability for damages that can be attributed directly or indirectly to the delivery, performance and use of this documentation.

PROXESS is not liable to any person or entity for any losses or damages that are allegedly or actually and directly or indirectly incurred in connection with the use of or impossibility of using the instructions contained in these documents. PROXESS reserves the right to change this document without prior notice, without being obligated to inform any persons of such changes or modifications.

General information

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.

Highlights in the text

Highlights are used in this documentation as follows:

Bold	Refers to menu commands, buttons, field names, options, program names 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 operation or useful additional information. Tips are always represented as they are in this paragraph.

Warning information

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

Print documentation

In addition to the online help that you are currently using, you can also open and print this program documentation as a PDF file with the free Acrobat Reader. You can find the respective PDF help files in the program group **PROXESS/Documentation**. Please see the Acrobat Reader Online Manual for information on how to use Acrobat Reader.

About the PROXESS Management Console

The PROXESS Management Console is used for centralized configuration of various PROXESS modules.

At present, the following PROXESS modules are configured using the PROXESS Management Console:

- PROXESS Data Miner
- PROXESS Document Signer
- PROXESS Explorer Link
- PROXESS Image Link
- PROXESS Index Miner
- PROXESS Emailing
- PROXESS Outlook Link
- PROXESS PDF Renderer
- PROXESS Path Search
- PROXESS Printer Link
- PROXESS Scan Link
- PROXESS Signature

The settings of some modules can be viewed, but not changed, here. The settings are configured in the program itself.

- PROXESS Web Client save masks (view only)
- PROXESS Web Client administrator settings (view only)
- PROXESS Web Client search masks (view only)
- PROXESS Web Client hit lists (view only)

Named profiles can also be distributed to other users and rolled out using the PROXESS Management Console.

This applies for the following modules:

- PROXESS Scan Link
- PROXESS Emailing

As all settings are saved centrally on the PROXESS server, they are available to the user regardless of the location.

Logging out and disconnecting the server

	Do not forget to explicitly save your settings before exiting the program or logging out. For this purpose, select the "**Apply all settings**" function in the context menu of the PROXESS server. **If the settings are not applied, the changes of the current session will be lost.** Only when new changes are saved are they then sent to the PROXESS server and available to every user.

Before logging out, check whether you would like to save the settings you made and carry out saving as described above if necessary.

To log out as a user of the PROXESS Management Console, select the Disconnect function (also available in the context menu).

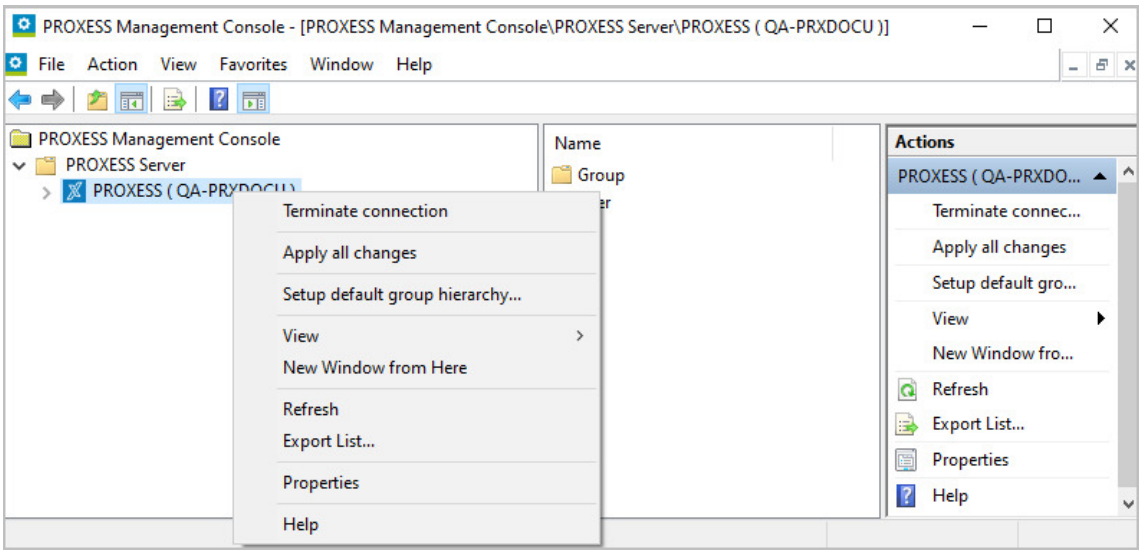


Fig.: Logging out of the system using "Save all settings" and "Disconnect"

	If you exit the program using **File/Exit** or by closing the window, only the program will be closed. You will remain connected as the user, however. This means that you do not have to log in again the next time you call up the program.

See also:
Documentation on the PROXESS Administrator Console, chapter: User management

Logging in and adding PROXESS servers

Start the PROXESS Management Console from the PROXESS program group. The following dialog box appears:

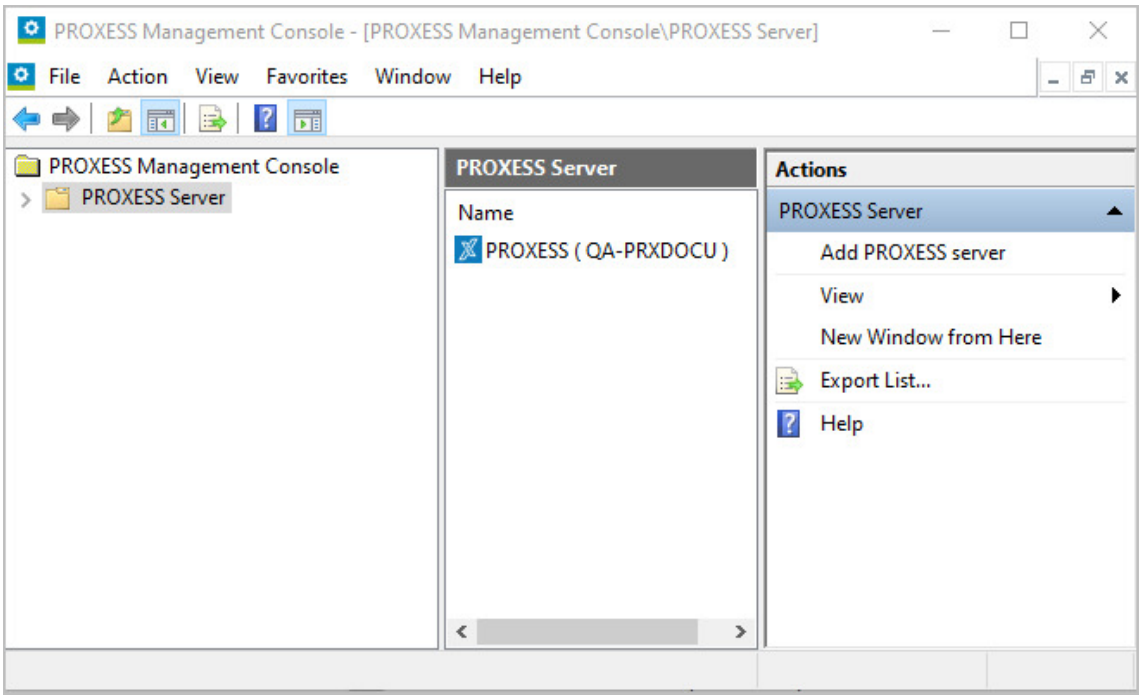


Fig.: The PROXESS Management Console after startup

To log in, you have to establish a connection to your PROXESS server.

For this purpose, select the “Add PROXESS server” function in the “Action” menu (or context menu).

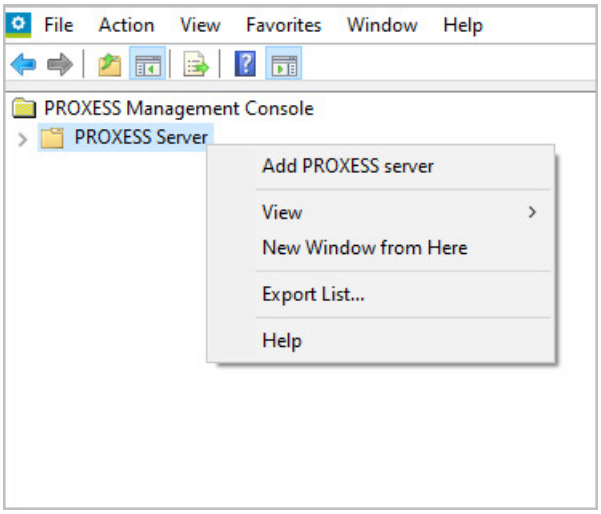


Fig.: Adding a PROXESS server in the PROXESS Management Console

The PROXESS login mask appears:

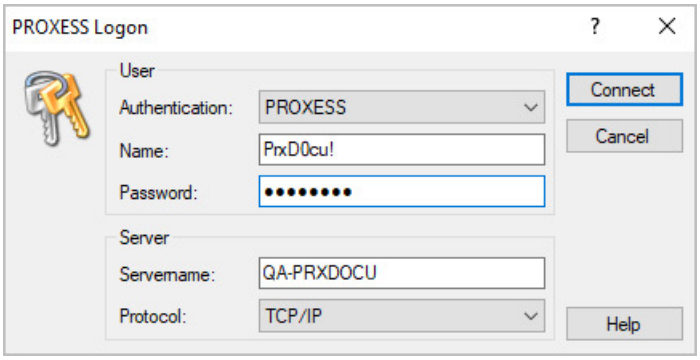


Fig.: PROXESS login mask (already filled in)

The following entries are necessary for login:

Authentication	As administrative settings not relevant to security are configured in the PROXESS Management Console, supervisor login with a smartcard and PIN entry is not provided here. PROXESS: If you choose this option, enter your PROXESS user name and password below and log in with them. The prerequisite for this login is that the PROXESS system administrator has registered you as a PROXESS user. Windows: If you choose this option, the system automatically uses your Windows login information for the PROXESS login. The prerequisite for this login is that the PROXESS system administrator has already registered and configured your Windows user account in PROXESS (Active Directory integration). Ask your system administrator about the authentication option you should use.
Name	This is where you enter your PROXESS short user name. You only fill in this field if you log in with “PROXESS” authentication.
Password	This is where you enter your PROXESS password. You only fill in this field if you log in with “PROXESS” authentication. Changing your own password is possible, e.g. in the “PROXESS” program or in “PROXESS Administrator”.

Now enter the login information and select the Log in command.

	Login generally only needs to be carried out once. The system saves your server connection and your user login data and establishes this connection to the PROXESS server again automatically the next time the program is run. If you authenticate yourself with your Windows user account, your login data is transferred automatically and a login mask does not appear. You only need to adjust the settings if you would like to log in with another PROXESS user, you would like to work with another PROXESS server or your password has changed.

After login, the selected PROXESS server is shown.

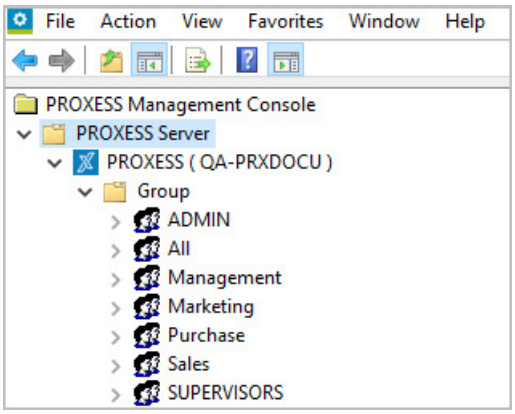


Fig.: PROXESS server node following login

Below the server, the groups and users set up in the user administration of the PROXESS Administrator Console are shown. All users and groups which you may manage according to your specified user profile appear in the view.

	In general, an administrator will specify the requirements for the PROXESS system in consultation with the person responsible for the project and then make the settings for all groups and users centrally. For this reason, logging in as an administrator is the most likely form of logging in to the PROXESS Management Console. An individual user can also log in to make settings for their own user profile, however.

View after logging in as a user

As a PROXESS user, you can see and manage your own user profile after logging in. In practice, however, at least one PROXESS administrator will make the settings in the PROXESS Management Console for all PROXESS users. You can only see group profiles of the groups of which you are a member. You cannot change them.

Example:
If the user “Joe Smith” logs in, the two groups “Personnel department” and “All” appear, as the user “Smith” is a member of both groups. “Smith” also appears as the user entry in the user branch.

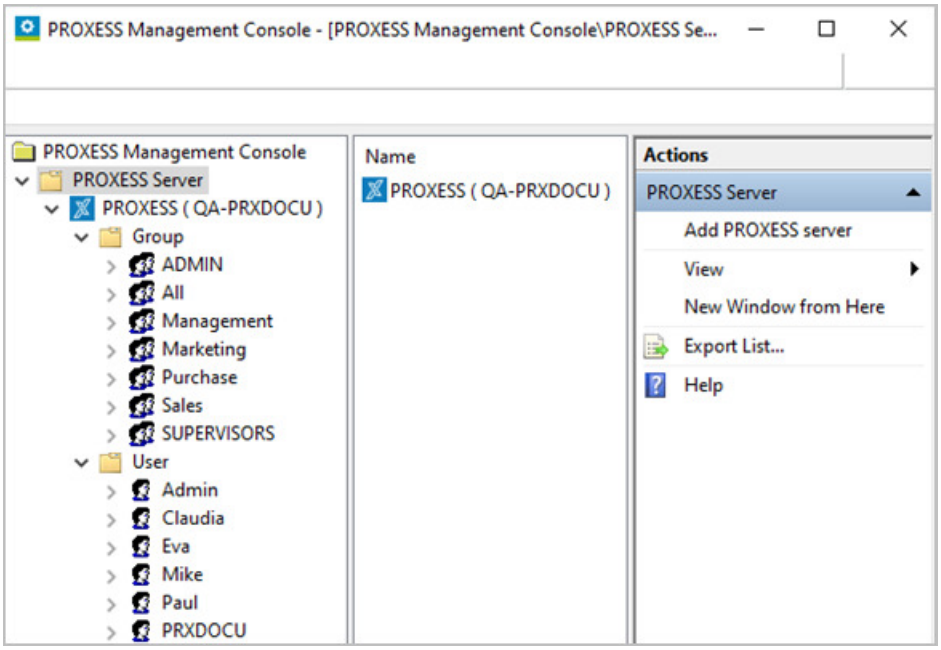


Fig.: The PROXESS Management Console after login as the user "Smith"

View after logging in as an administrator

After logging in as an administrator, you can see the user profiles of all users and groups created in the system.

Example:
If the administrator (or another member of the "Admin" group) logs in, all groups and users appear in the mask. Administrators are authorized to make settings for all users and groups.

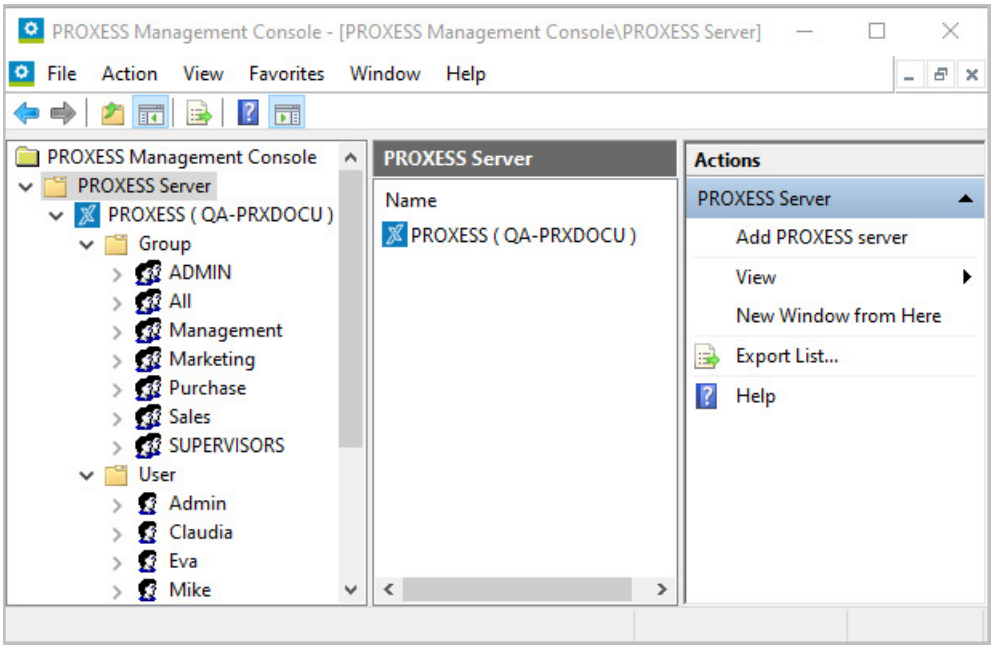


Fig.: PMC after logging in as an "administrator"

See also:

Documentation on the PROXESS Administrator Console, chapter: User management

Specifying a default group hierarchy

As a user can be a member of multiple groups, it is important to specify which group settings take precedence. A group hierarchy should therefore be specified for each module.

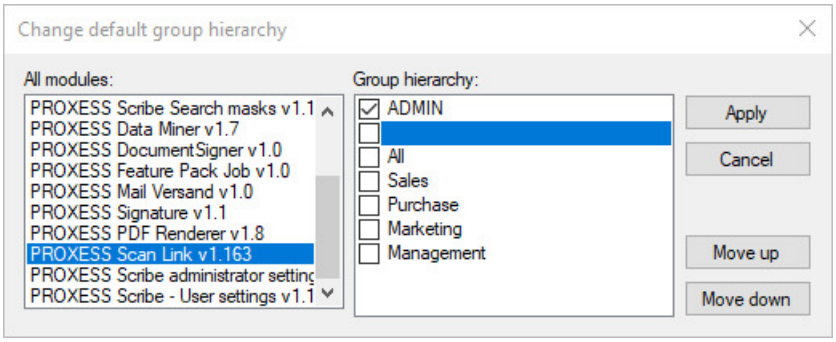


Fig.: Group hierarchy for the "PROXESS Scan Link" module

When specifying the settings for the group hierarchy, the following order applies:

1. User-specific module profiles take precedence over group profiles.

2. Only activated groups (with check mark) are evaluated.

3. Only the settings of the group with the higher priority apply.

4. Settings of lower groups are only taken into account if there is no module profile for the higher-level group.

	If **a group hierarchy is not specified** and there are also no user-specific profile settings, **the default settings of the respective module apply**. Any **settings made on the group level** in which the user is a member **are not evaluated without a group hierarchy**.

Examples (for figure above):

User property/Action	Evaluation
User is a member of the "Personnel department" group and the "All" group.	The settings of the "Personnel department" group apply.

The user is a member of the "Administrator" group.	The default settings of the PROXESS Printer Link module apply, as the "Admin" group is not activated for evaluation of the group hierarchy.
Changes are made in the PROXESS Printer Link module profile for the "All" group.	This change does not affect members of the "Personnel department" group, as the "All" group is below the "Personnel department" group in the hierarchy.

See also:

Adding a module

Adding a new module

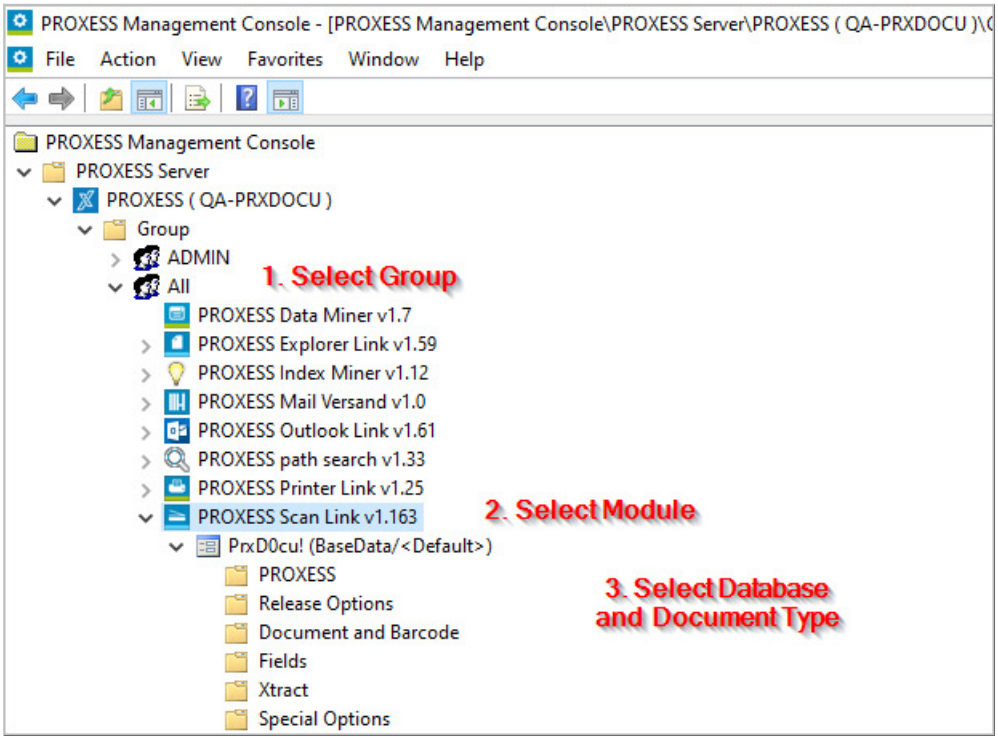
After logging in, you can create and configure PROXESS modules.
Modules are usually named after PROXESS modules, e.g. PROXESS Scan Link or PROXESS Printer Link.

You can then create and set up the profiles under each module.

A profile contains settings

- for a group or a user
- for the selected PROXESS module
- for a database
- for an individual document type or all document types (default)

You make this selection by choosing within the offered list and clicking through “the directories” in this way.



	If you would like to create a uniform module configuration for all PROXESS users, we recommend establishing a group called “All”, of which each PROXESS user is a member. This group first has to be created by the supervisor in the user management of the PROXESS Administrator Console. Through membership in this group, the user does not get any access authorization to documents per se, so as to not create any gaps in security. Functional groups, e.g. “Printer Link users”, can also be set up. With this, a configuration profile can be created for this group. Through membership in this group, a new user is then automatically given this configuration profile as well.

Step by step:

The first step in creating a profile is to add the desired module.

To add a module, **mark** the desired group or the desired user.

In the “Action” menu, select the **Add module** command (the context menu can also be used).

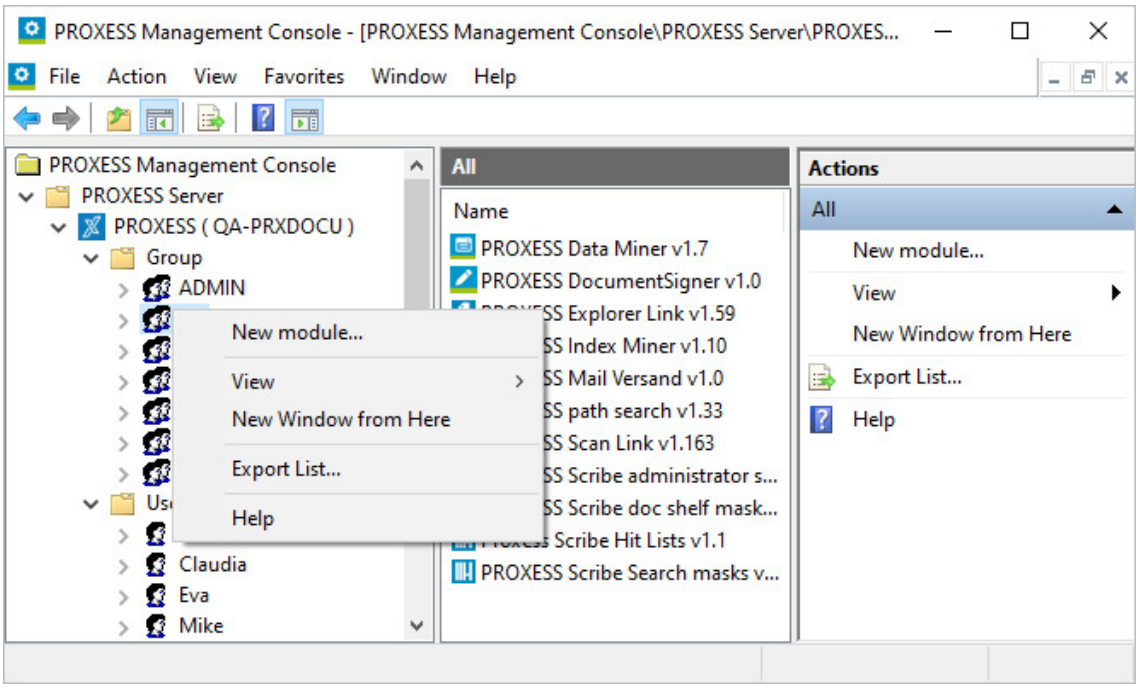


Fig.: Adding a new module for configuration for the “All” user group

	Depending on your authorization in the overall system, different users and groups are displayed in the tree. If you are logged in as a user, you can only see yourself and all groups of which you are a member. If you are logged in as an administrator, all users and groups of the PROXESS system are displayed.

In the dialog box, select the desired module and confirm your selection with the **OK** command.

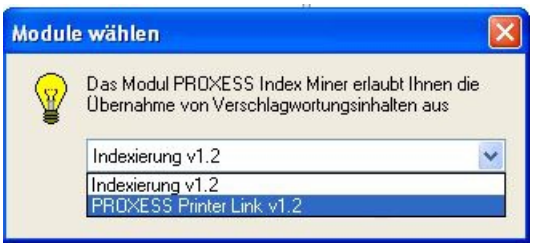


Fig.: Selecting the "PROXESS Printer Link" module to create a new module configuration

The selected module now appears under the selected group/user:

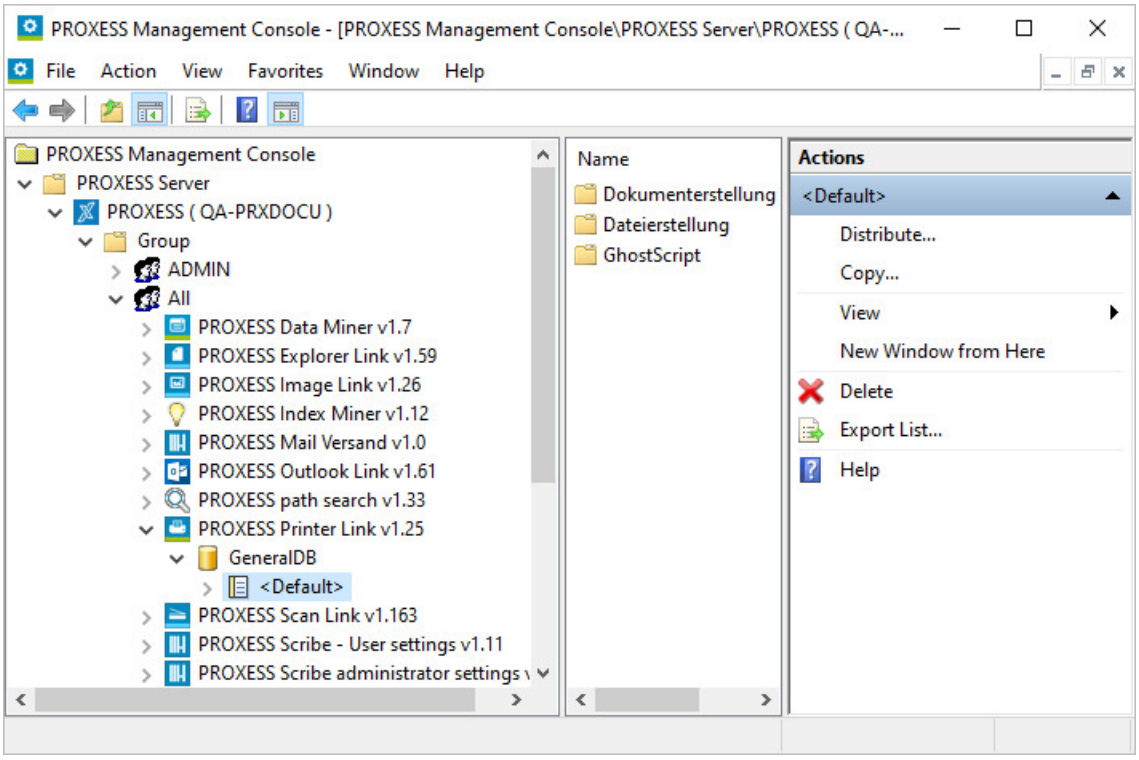


Fig.: Printer Link module added to the "All" group.

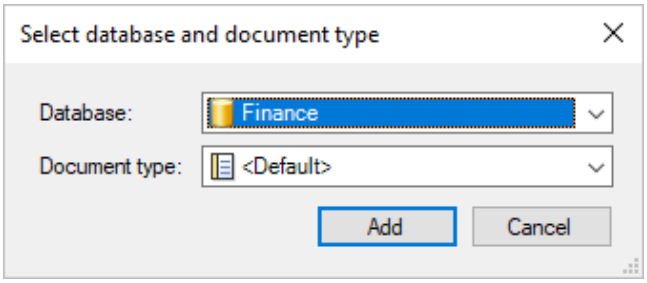
Creating a profile

First select the module for which the new profile is to apply (e.g. PROXESS Explorer Link).

Depending on the module, there are two alternatives for adding a profile.

Alternative 1: Add default profile

You can add a default profile using the context menu.

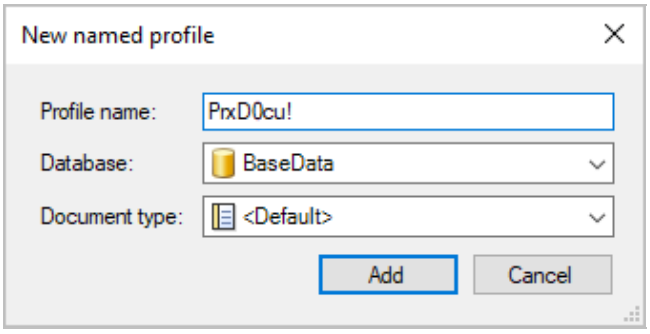


Select the database and document type which is to apply for this profile.

For the document type, select the ***<Default>*** entry. This means that the settings apply for all document types of this database. The profile name is then Default as well. If you select a specific document type, the profile is named after the document type.

Alternative 2: Add designated profile

With some modules, the **Add designated profile** command appears in the context menu. In this case, you can assign a profile name of your choice.



If you select the “Default” document type entry, your new module configuration applies for all document types of the selected database (if there are no other configuration profiles for individual document types of this database).

The configuration options available for this PROXESS module then appear.

Save the settings you made!

	Before exiting the program or before logging out, you have to explicitly save the settings you made. **If the settings are not applied, the changes of the current session will be lost.** Only when changes are saved are they then sent to the PROXESS server and available at every workstation.

Two options are available for saving the settings you have made:

First option: Save the settings made on the module level.

Mark the module whose settings you would like to save in the console root and select the "**Apply settings**" command in the "Action" menu (or the context menu). Using the **"Reject settings"** command, you can undo all the settings made in this session.

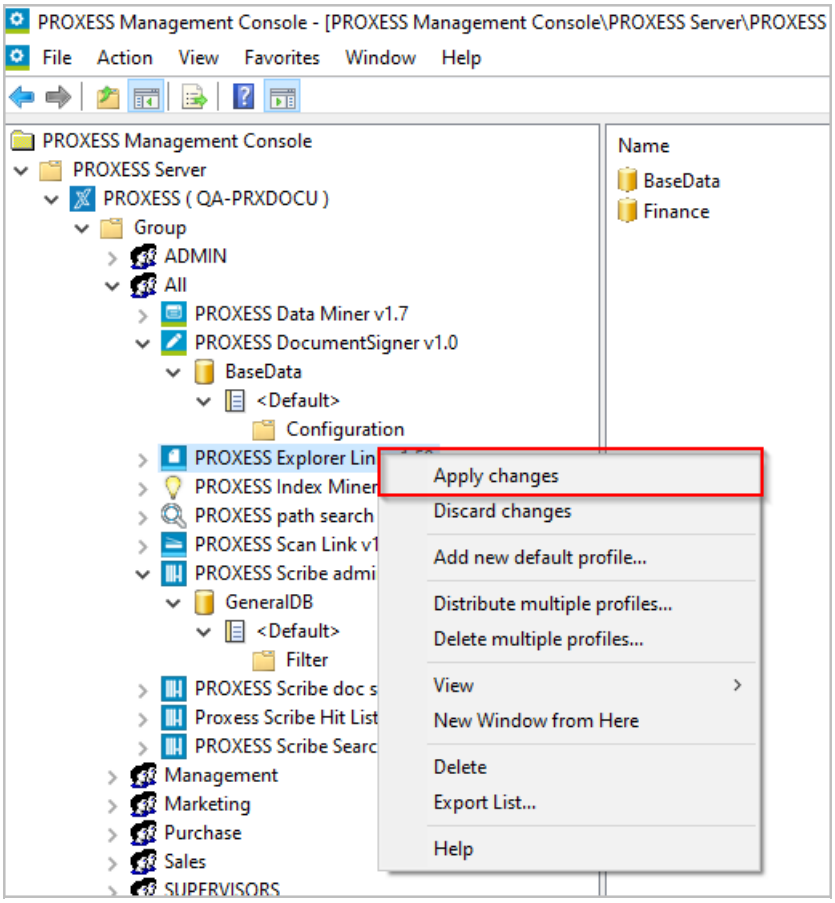


Fig.: Saving the module settings (in this case, for the "PROXESS Index Miner" module)

Second option: Apply settings for all modules

Before you exit the PROXESS Management Console, you can save the settings you made for all modules in a single step. For this purpose, mark the active PROXESS server in the console root and select the **"Apply all settings"** menu item in the "Action" menu (or the context menu). The settings you made are now sent to the

PROXESS server and take effect immediately for the user. Using this function, you save all module profiles with a single command.

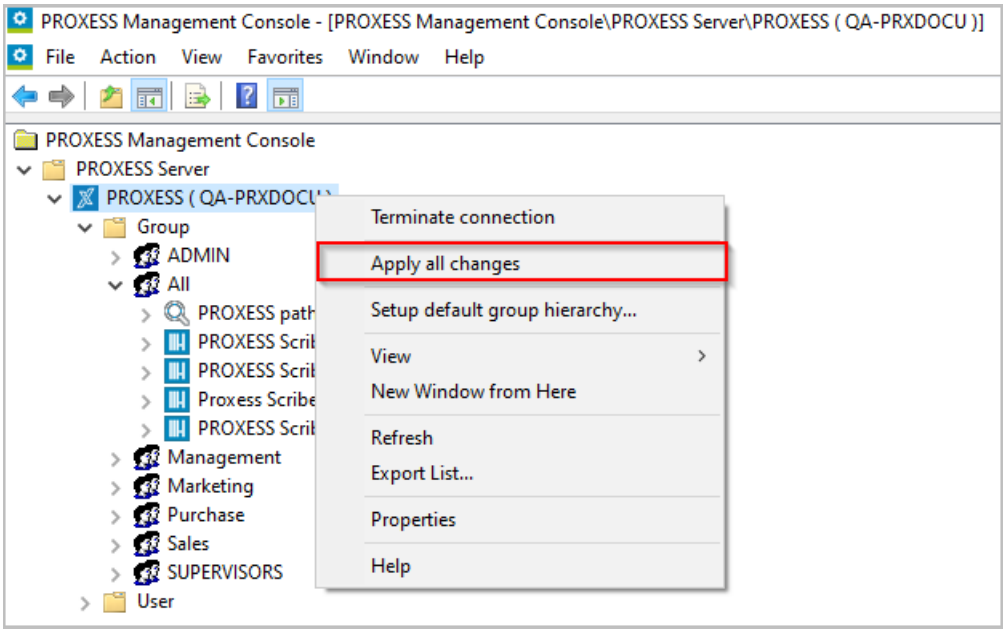


Fig.: Saving all module profiles using the "Apply all settings" command

---

See also:

Adding a module

Specifying the order for mining groups (Base Data Miner)

You can specify the order of the mining groups using the **Up** and **Down** buttons.

This is only used by automatic import modules such as the PROXESS Import Service and indicates the processing order of the groups.

This setting is not relevant for interactive modules like the PROXESS Web Client or the PROXESS Desktop modules.

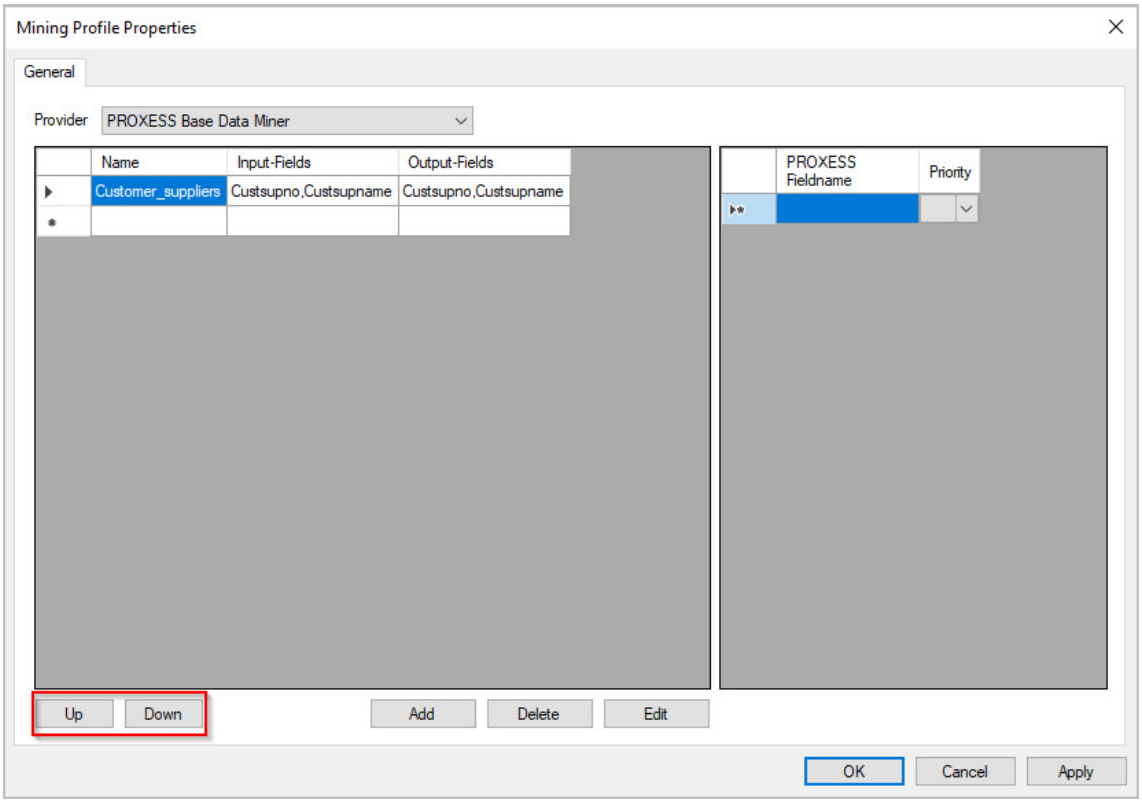
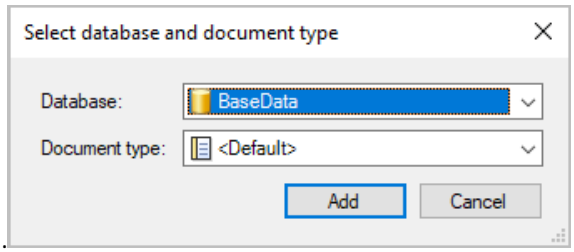


Fig.: Different mining groups within a mining profile

Creating and editing a mining profile (Base Data Miner)

Step by step

- On the home page of the PROXESS Management Console, select the **PROXESS Data Miner** profile or add it if it has not been created yet (see also the following topic: Adding a module)
- Create a new profile using the context menu by selecting the desired PROXESS server and the desired group or an individual user. For this purpose, select the archive database and a document type or "Default" for all document types for which the query is to be carried out. (see also the following topic: Adding a profile).



- The profile is now created. A new entry, "**Configuration**", appears on the left, and a new entry "Mining profile" on the right.

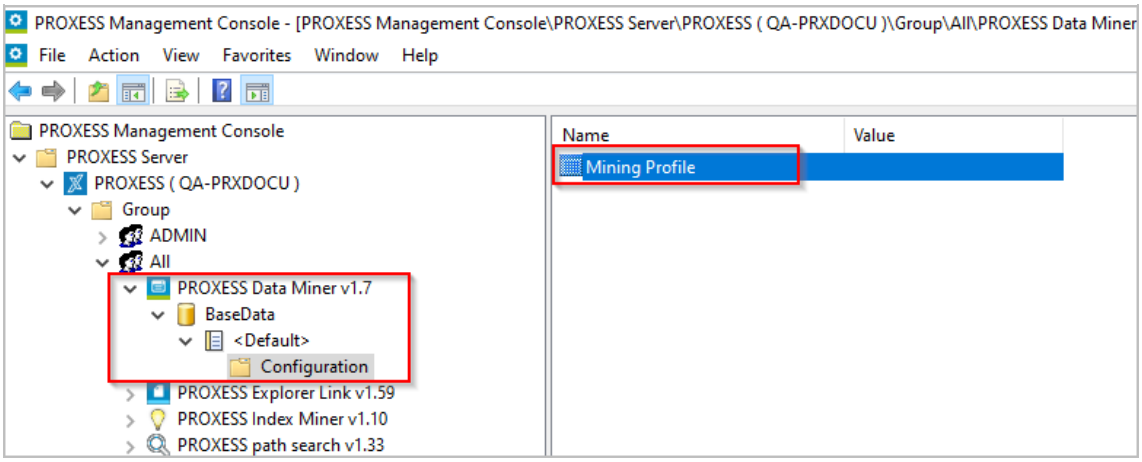


Fig.: Data Miner profile

- The configuration editor opens by double-clicking **Mining profile**.
- **Create a new profile:** Select "PROXESS Base Data Miner" as the provider (see Selecting an operating mode) and select the **Add** command.
- **Edit an existing profile:** Mark the desired group and select the **Edit** command.

The setting dialog for the profile and the selected or new group opens:

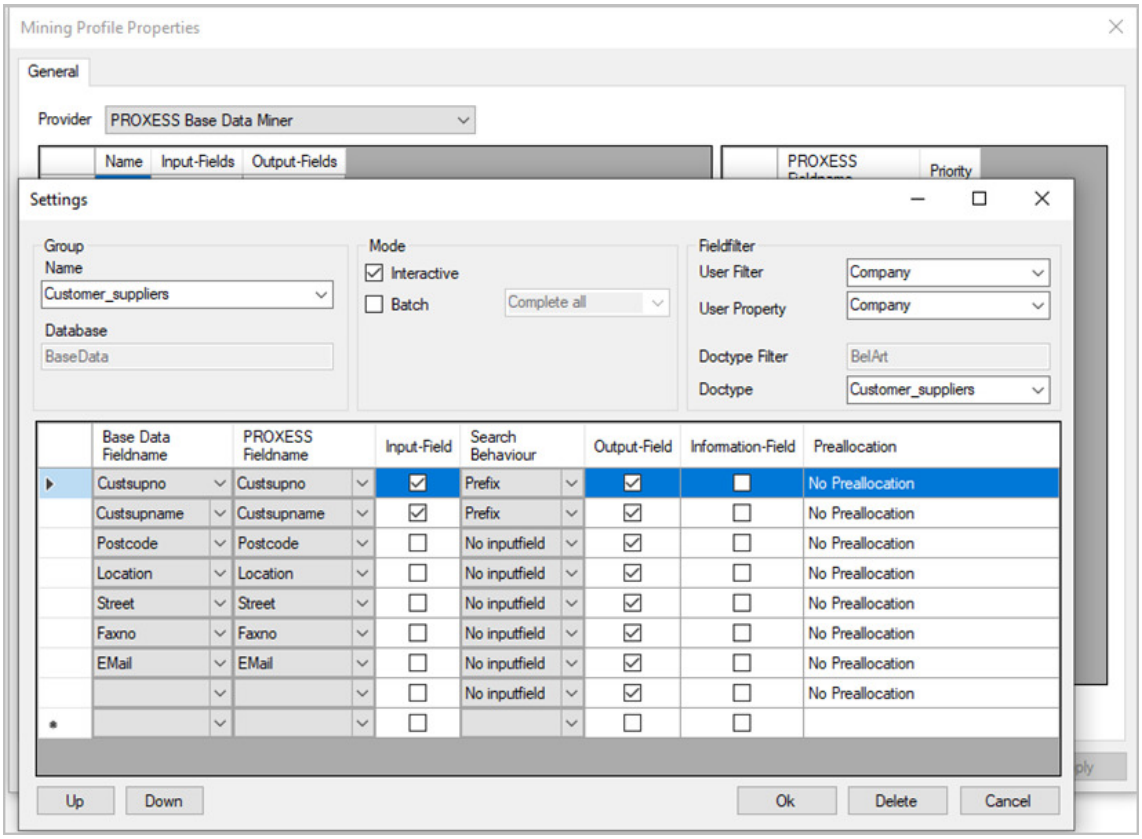


Fig.: Configuration editor for a mining profile

Mapping between the imported master data in the Base Data database and the query and result fields of the PROXESS archive databases occurs here. Here you specify which fields are to be used as query fields or result fields.

In this example, master data fields such as the customer/supplier number or customer/supplier name are defined as query fields and the associated customer/supplier address data and contact data such as phone number and email are defined as the result fields.

These settings are made in what are known as mining groups. All other information can be found under Creating a mining group (Base Data) and Configuring a mining group (Base Data).

	Before exiting the PROXESS Management Console or before logging out, you have to explicitly save the settings you made. For this purpose, select the **Apply settings** function in the context menu of the module. Alternatively, you can select the **Apply all settings** function in the context menu of the PROXESS server. With this, the settings of your entire session are saved for all modules. **If the settings are not applied, the changes of the current session will be lost.** Only when changes are saved are they then sent to the PROXESS server and available at every workstation.

Creating a mining group (Base Data Miner)

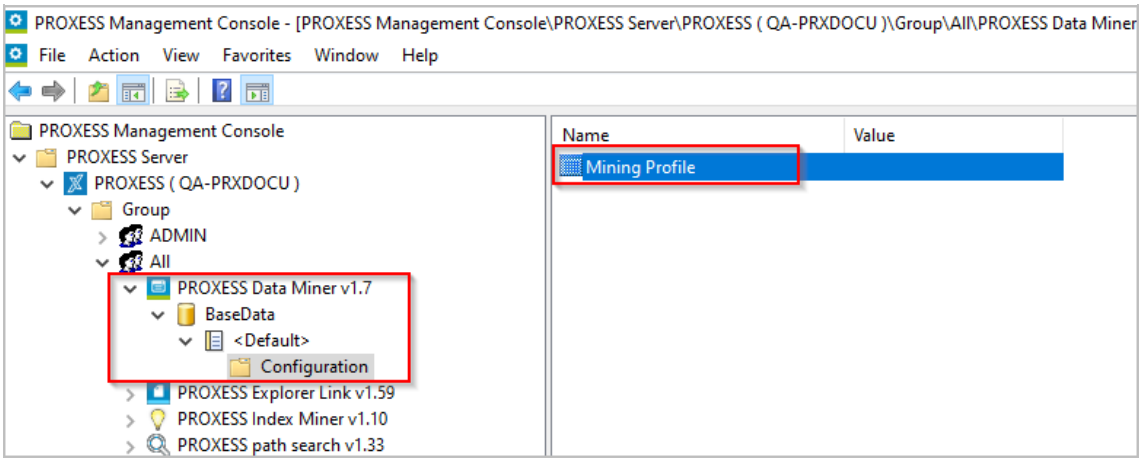
	The requirement here is that you have selected the “PROXESS Base Data Miner” operating mode. If the operating mode is changed, the entire profile is reset to the initial state. In order for this to not occur accidentally, the user is alerted to this with a warning message.

A mining group defines a set of query and result fields. All mining groups appearing in the selection list correspond to the document types of the “BaseData” database.

Example:
Group 1: Customers_Suppliers
Goal: Query of the customer and supplier master data
Query fields: Customer/supplier number and customer/supplier name
Result fields: Customer/supplier number and customer/supplier name, other address data of the customer/supplier

Group 1: Item
Goal: Query of the item master data
Query fields: Item number
Result fields: Item name, serial numbers, purchase price

Creating a mining group, step by step:



1. Select the **PROXESS Data Miner** profile.
2. Select the PROXESS server, the desired group or an individual user.
3. Select the archive database and a document type or “Default” for all document types for which the master data query is to be carried out.
4. A new entry, “**Configuration**”, appears, and a new entry “Mining profile” on the right.

5. If you now double-click “**Mining profile**”, the following dialog box will appear:

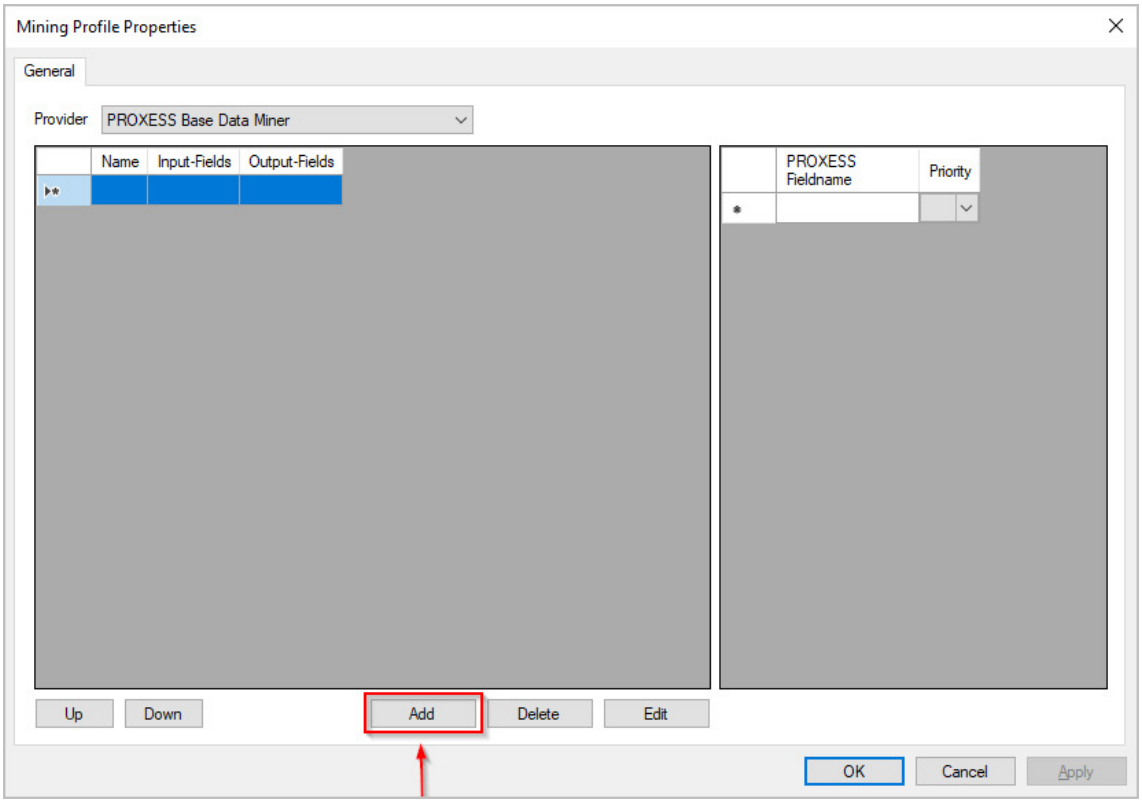


Fig.: Creating a new mining group

During the initial configuration, no mining groups are available.

Clicking the **Add** button opens the configuration editor, in which the new group can be created.

The other steps are described in the Configuring a mining group topic.

Editing a mining group (Base Data Miner)

To change a group and its configuration, the corresponding row must be selected; the settings window is opened again by clicking
Edit.

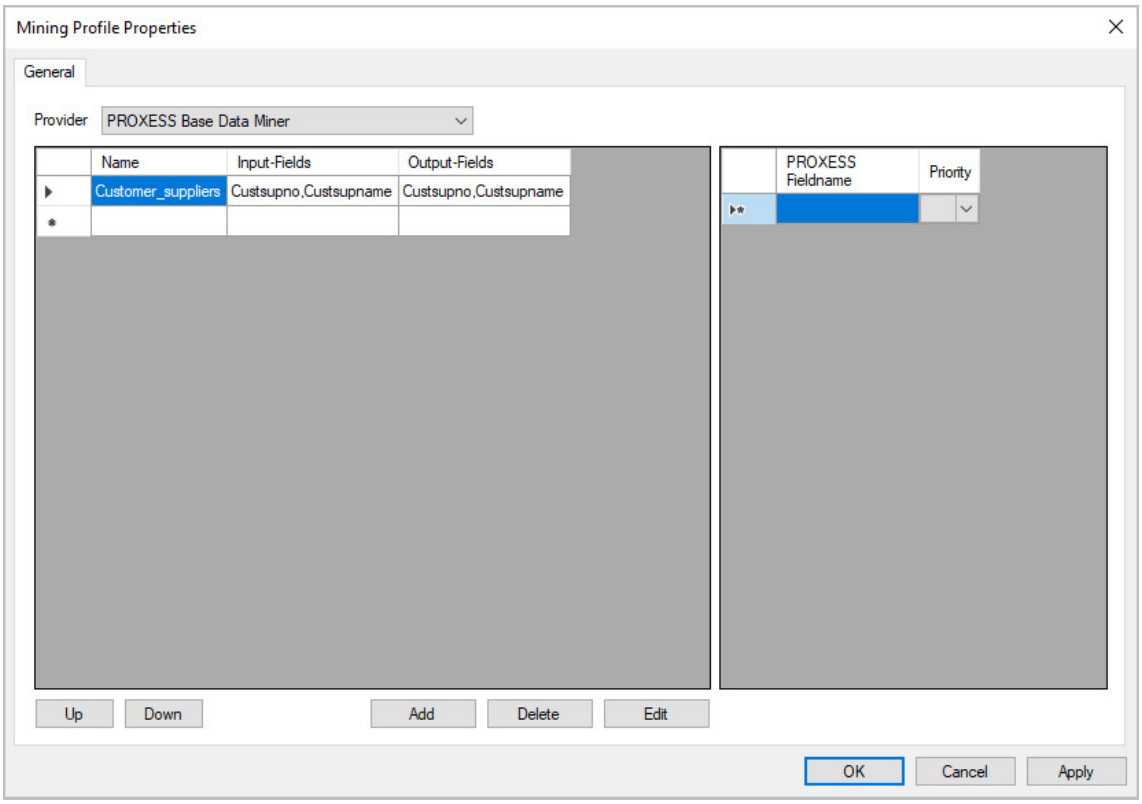


Fig.: Editing mining groups

Configuring a mining group (Base Data Miner)

A mining group defines query and result fields for a document type of the master database.

Multiple mining groups can belong to a single mining profile.

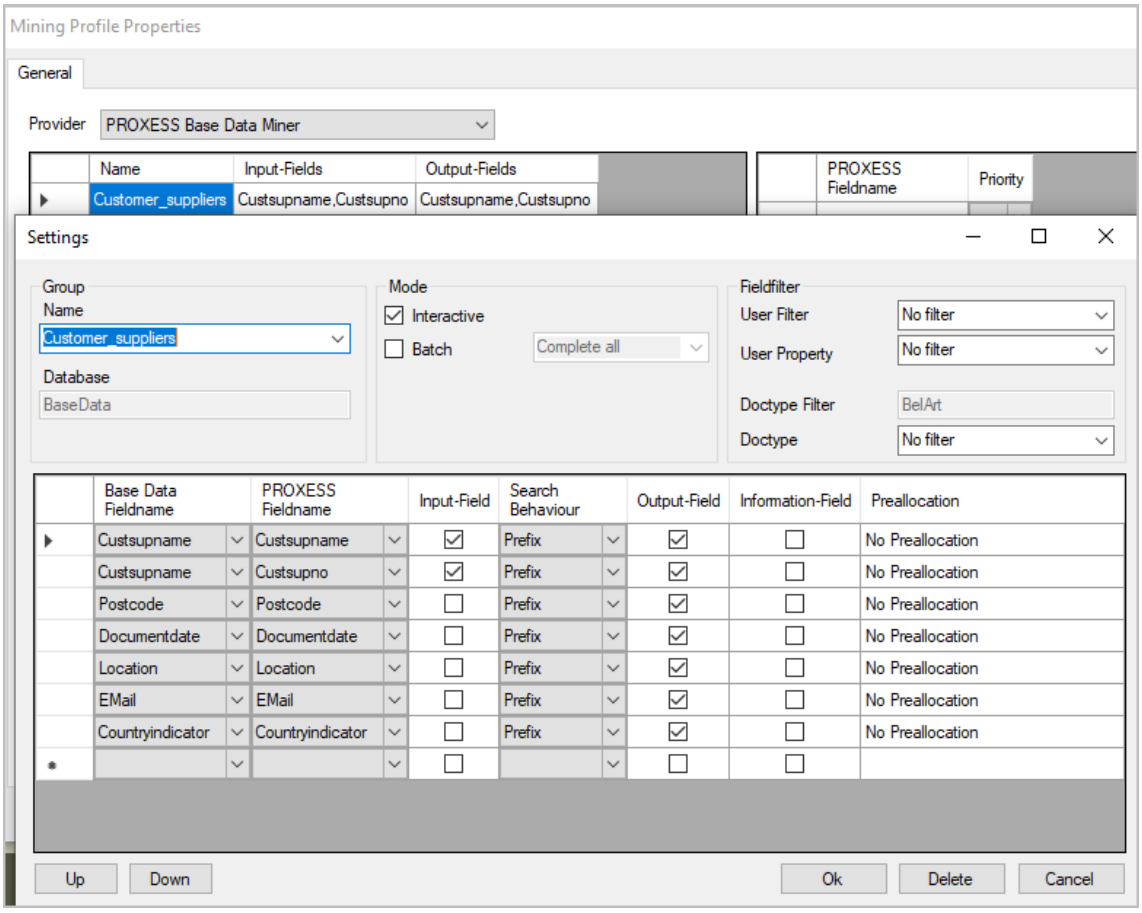


Fig.: Configuring a mining group

Group name	A name must be selected for the group first. This corresponds to a document type of the master database (BaseData). In this case, the document type "**Customers_Suppliers**" is selected. For the selection of master data for mining, this means that only hits from the master database of the Customers_Suppliers document type are displayed for this group.

Editing mode	Editing mode indicates the clients for which the group is configured. The configuration shown here corresponds to the default. A group can be configured for both interactive and batch clients, but has to be activated for at least one of the two. **Interactive** activates mining for interactive clients, such as the PROXESS Web Client. **Batch** activates mining for batch clients, such as the PROXESS Import Service, where selection of the type of editing (supplementation or overwriting) can also be made. Batch mode only works with clear matching. Type of editing in batch mode: • **Overwriting** means that all result fields are copied if there is a hit, even if one or more fields were already filled in. • **Supplement** only fills in empty fields and does not overwrite them.
(Field) filter	The **(field) filter** enables filtering of the displayed query results in the master database based on a PROXESS user property, such as company or department. **User filter:** The field of the ***BaseData*** master database with which the user property is to be compared is selected here. **User properties** are managed in the PROXESS Administrator Console. They are either copied automatically through Windows AD integration or entered manually. The desired field for the filter is selected here. The entries of these two fields are compared in a master data query by the user and, if the field values are the same, a correspondingly adjusted list of results is provided. Example: A company group consists of Company A and Company B. All employees receive the entry “Company A” or “Company B” in the “Company” field in the user properties in the PROXESS Administrator Console. All imported master data records also receive the “Company A” or “Company B” identifier in the “Company” database field of the BaseData database. When an employee of Company A makes a query, only master data records of Company A are presented for selection, and only master data records of Company B for a query by the employee of Company B. **No filter:** If no filter is desired, this must also be selected as the setting.

Document type filter	The document type filter can be used to further filter results of mining based on the document type entered in the database. The selected PROXESS document type of the archive database is compared to the database field **DocType** (field name for the document type) here. Example: Document type purchasing invoice (130) is selected as the document type filter. With this, only mining results with the value purchasing invoice (130) in the BaseData database field ***DocType*** are taken into account. This kind of data record can be created with a constant when importing the master data. **No filter:** If no filter is desired, this must also be selected as the setting.
General field mapping and field settings	Finally, the field settings of the group are configured. Mapping of the master data field name of the BaseData to the PROXESS field name of the respective archive database must be selected here. They can be selected using a dropdown menu.
Query field	If this field is filled in with values, a master data search with its contents is initiated.  A field can be a query field and a result field at the same time.
Search behavior	**No query field:** If the field is not a query field, a search behavior does not need to be selected. **Exact:** With an exact search, the only hits displayed are those which correspond exactly to the entered value. **Prefix:** The prefix search provides all results which begin with the entered characters. **Full-text:** The full-text search searches for hits where the entry occurs within this field.

Result field	A result field is filled in with the values from BaseData following a successful query.  If a field is declared as a result or information field, the entry in the Search behavior field is irrelevant. A field can be a query field and a result field at the same time.  If documents already indexed by the Base Data Miner are to be mined again, field values already filled in can be overwritten.
Information field	This field is displayed in the hitlist following a successful query of the master data, but not filled in. An information field can be neither a query field nor a result field.
Search behavior	**No query field:** If the field is not a query field, a search behavior does not need to be selected. **Exact:** With an exact search, the only hits displayed are those which correspond exactly to the entered value. **Prefix:** The prefix search provides all results which begin with the entered characters. **Full-text:** The full-text search searches for hits where the entry occurs within a field. **Note:** If a field is only declared as a result or information field, the search behavior entered here is irrelevant.

Pre-allocation	Pre-allocation can be defined for each output or information field. This value is then automatically suggested for use in all hits for which this field is empty in the master data record. The following values have a special meaning: **No pre-allocation:** There is no pre-allocation. If the field in the mined document is empty, it is also returned empty in the mining result. **Date:** Inserts the current date. Example: The pre-allocation of the **CuDeCountry** field is “Germany”. A master data search yields the following hits: { CuDeNam: "Gastro Ltd", CuDeNo: "12345", **CuDeCountry: <no_value>**}, { CuDeNam: "Furniture Fix Ltd", CuDeNo: "24246", CuDeCountry: "Switzerland"}, { CuDeNam: "Ultramed Co", CuDeNo: "998552", CuDeCountry: "Germany"} { CuDeNam: "Speedo Ltd", CuDeNo: "110112", **CuDeCountry: no_value**} The following master data records are then suggested for use in the document: { CuDeNam: "Gastro Ltd", CuDeNo: "12345", **CuDeCountry: "Germany"**}, { CuDeNam: "Furniture Fix Ltd", CuDeNo: "24246", CuDeCountry: "Switzerland"}, { CuDeNam: "Ultramed Co", CuDeNo: "998552", CuDeCountry: "Germany"} { CuDeNam: "Speedo Ltd", CuDeNo: "110112", **CuDeCountry: "Germany"**}
Remove	After selecting the corresponding row, you can delete the field from the list by clicking the **Remove** button.
Up/Down	Here you determine the column order in which the fields appear to the user in the master data selection list.
OK	Clicking **OK** creates the entire group and closes the settings window. This group is then displayed in the overview of the editor.

	Before exiting the PROXESS Management Console or before logging out, you have to explicitly save the settings you made. For this purpose, select the **Apply settings** function in the context menu of the module. Alternatively, you can select the **Apply all settings** function in the context menu of the PROXESS server. With this, the settings of your entire session are saved for all modules. **If the settings are not applied, the changes of the current session will be lost.** Only when changes are saved are they then sent to the PROXESS server and available at every workstation.

Deleting a mining group (Base Data Miner)

Once the corresponding row has been selected, a mining group can be deleted by clicking **Remove** and then confirming the dialog.

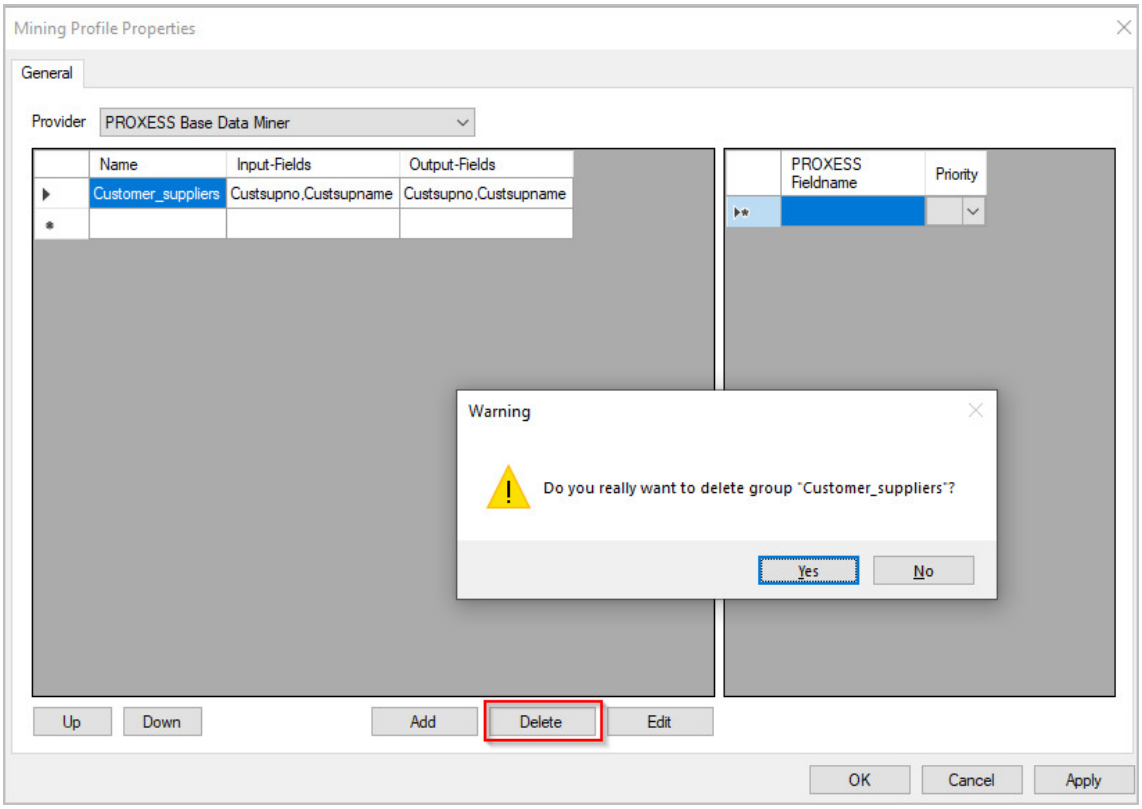
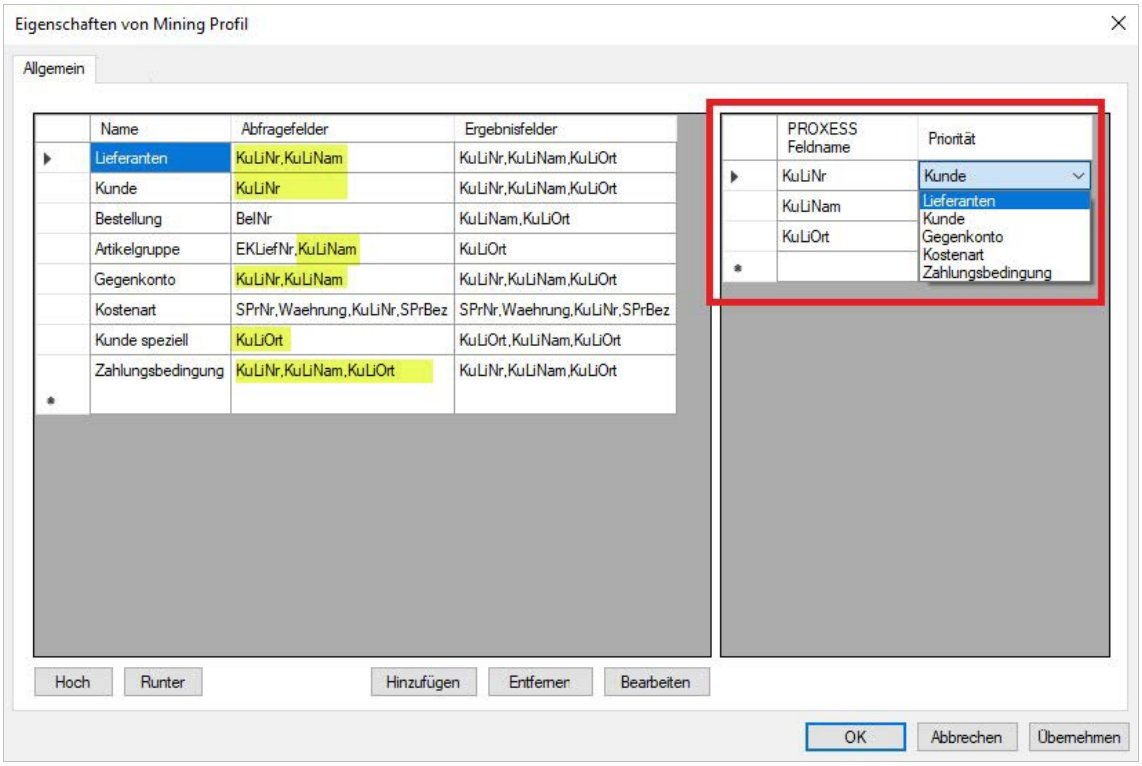


Fig.: Deleting a mining group

Defining query priorities (Base Data Miner)

Each query field is automatically assigned to the group in which it is configured. An exception to this is query fields which occur in several groups. The group to which it is primarily assigned must be decided upon here.

Example:



The CuDeNo, CuDeNam and CuDeLoc fields are declared as query fields in several mining groups in this example.
For this reason, all mining groups for which this field is configured as a query field (customer, supplier, item group and payment conditions) are listed in the dropdown list next to them.

By selecting “Customer” in the example above, the master data lookup of the mining group customer is now displayed for the user in the PROXESS Web Client if they search in the CuDeNo field. In the “CuDeNam” field, on the other hand, the configuration of the supplier group is displayed.

Requirements for the configuration of the PROXESS Base Data Miner

Before a configuration can be created for master data processing, a database with the fixed name **“BaseData”** has to be created in the PROXESS Administrator Console.

All document types and database fields in this database filled in by the master data import also have to be created in the PROXESS Administrator Console.

The **BaseData** database later contains all the important master data and is used by the PROXESS archive databases as a reference. This being the case, the BaseData database may not be used as a database for configuration.

What is the PROXESS Base Data Miner?

In the PROXESS Base Data Miner module, configurations are specified for the use of imported master data when indexing from third-party systems.

The following differentiation is made here:

Indexing using external master data
Manual indexing via PROXESS Web Client or the PROXESS Desktop modules allows users to interactively access external master data, for example from their own ERP system. For instance, all the master data for a customer can be automatically transferred to the PROXESS index screen using a key field such as customer name or customer number. Import modules, such as PROXESS Import Service, PROXESS Import Server, PROXESS Web Service & PROXESS Gateway, can also access external master data as part of their automatic batch imports.

Importing external master data
Master data import is a function of the PROXESS Import Service. External master data from ERP systems, for example, can be transferred and imported into PROXESS via CSV file. The transferred master data is saved in a PROXESS database (BaseData) and, if configured accordingly, available for indexing documents in all PROXESS archives, i.e. across all databases.

What is a mining profile?
The entire configuration of master data mining for a document type or “Default”.

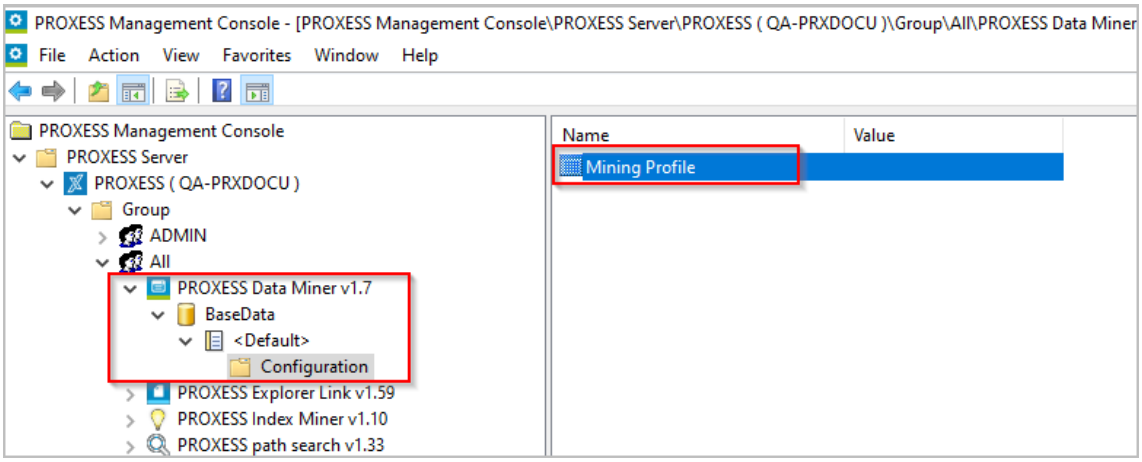
What is a mining group?
An individual definition of query and result fields for a document type in the master database. Multiple mining groups can belong to a single mining profile.

Creating a mining group (Index Miner)

An Index Miner group defines a set of query and result fields.

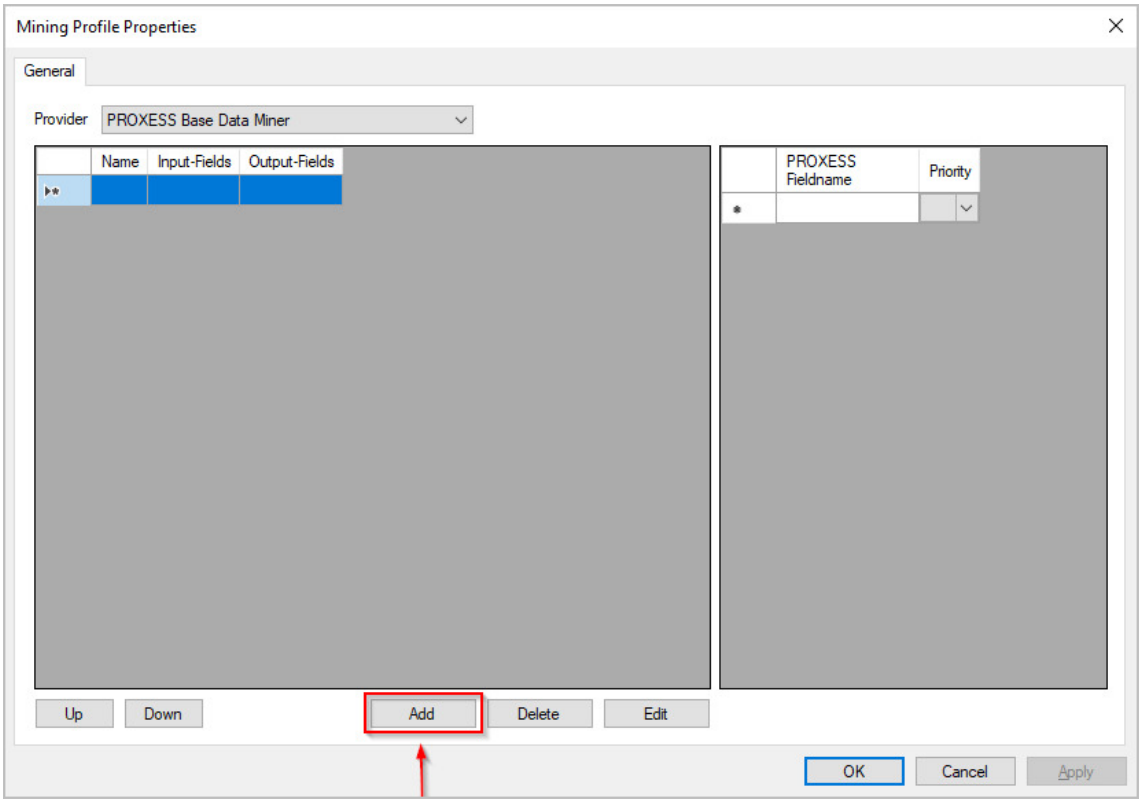
During the initial configuration, no mining groups are available.

Select the desired mining profile.



If a mining profile does not yet exist, create a new profile (Creating and editing a mining profile (Index Miner).

Double-click "**Mining profile**". The following dialog box opens:



You can create a new mining group using the **Add** button.

All other steps for setting up and configuring the mining group can be found here: Configuring a mining group

(Index Miner)

Editing a mining group (Index Miner)

To change a group and its configuration, the corresponding row must be selected; the settings window is opened again by clicking
Edit.

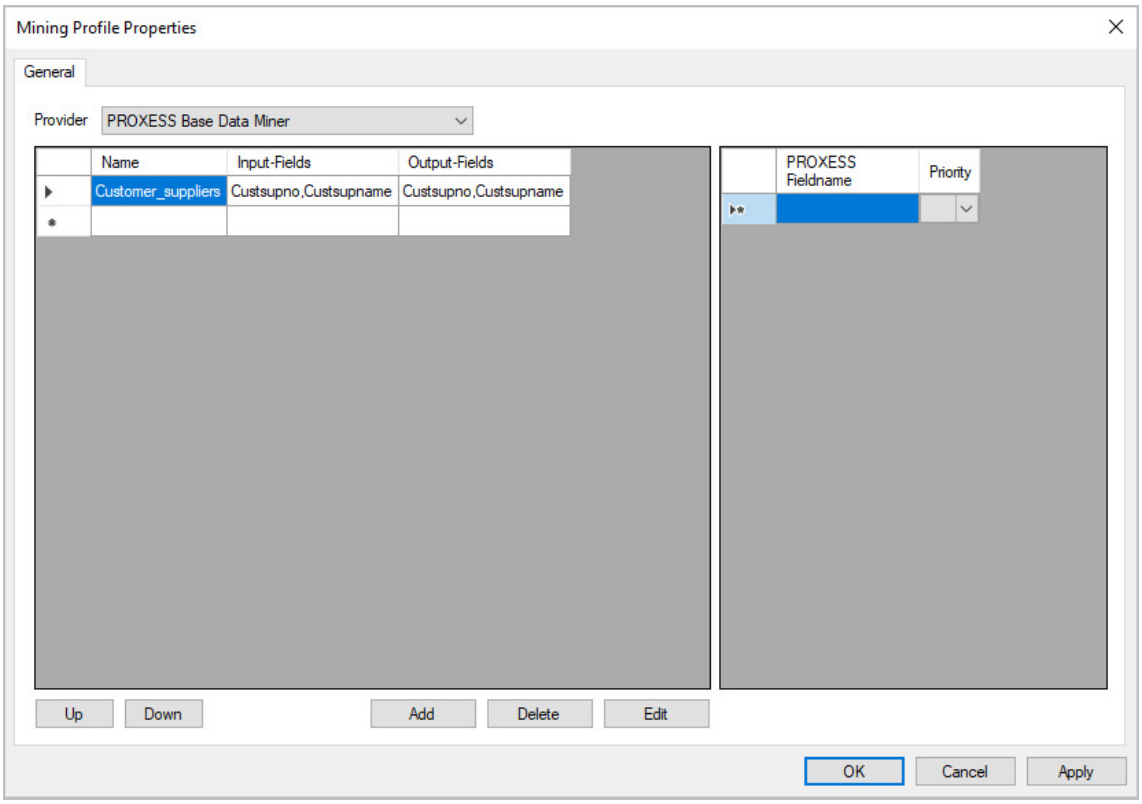


Fig.: Editing mining groups

Configuring a mining group (Index Miner)

If a mining group does not yet exist, you have to create one first.
For this purpose, see: Creating a mining group (Index Miner)

Several limitations apply to PROXESS Index Miner groups:

- Only **one mining group** can be defined. Its name is always specified as the text **"IndexMiner"**.
- The database is specified as the **archive database** for which the profile is configured and also cannot be changed.
- Only **interactive editing mode** (PROXESS Web Client or PROXESS Desktop modules) is supported. Editing is not possible in batch mode (automatic document enhancement in the background by the Document Manager).

For this reason, these options are deactivated in the configuration editor for an Index Miner group:

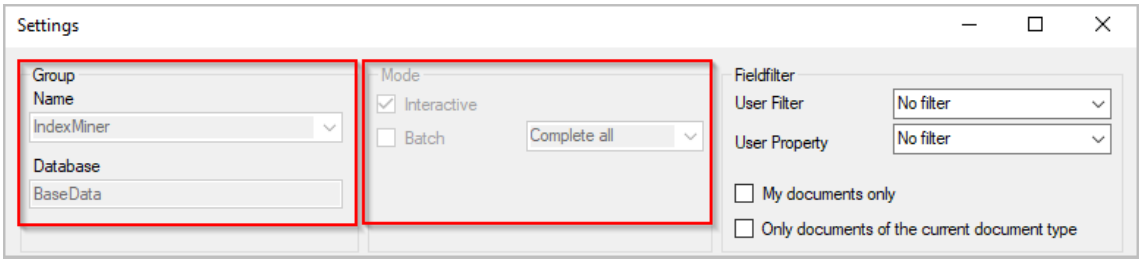


Fig.: Settings in the configuration editor for an Index Miner group

All settings at a glance:

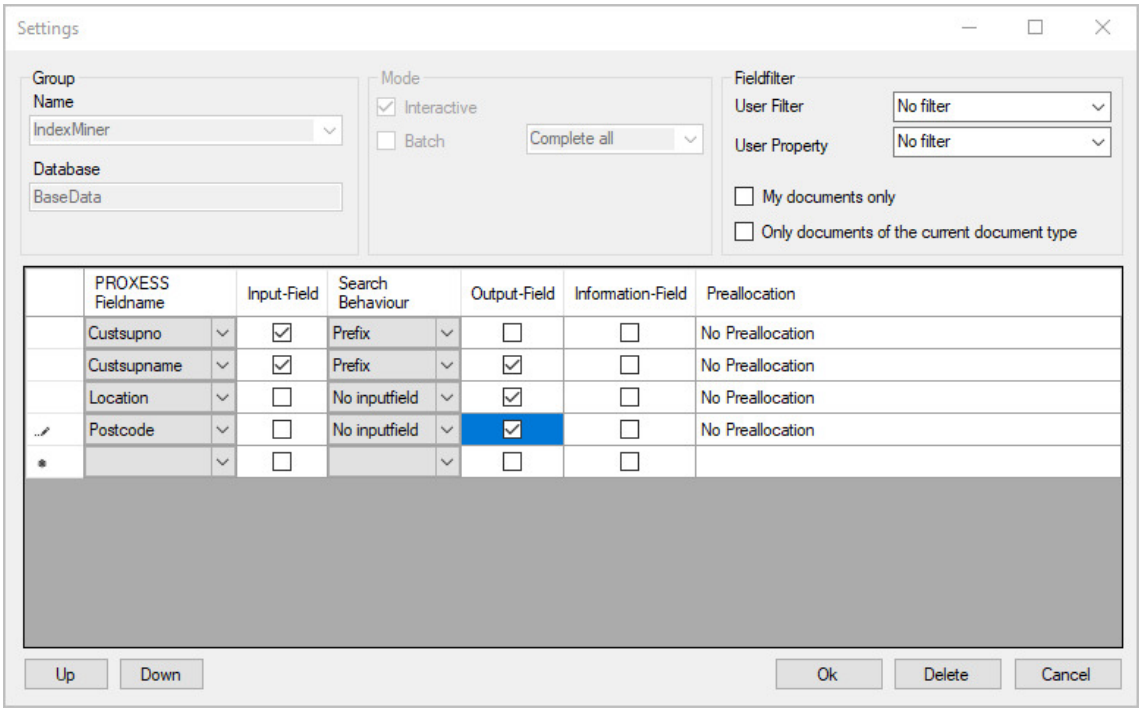


Fig.: Configuring an Index Miner group

Group name	Only **one mining group** can be defined. Its name is always specified as the text **"IndexMiner"**.
Editing mode	The PROXESS Index Miner supports only **interactive editing mode** (used by the PROXESS Web Client or PROXESS Desktop modules). Editing is not possible in batch mode (automatic document enhancement in the background by the Document Manager).
(Field) filter	The **(field) filter** enables filtering of the displayed query results based on a PROXESS user property, such as company or department. **User filter:** The field of the archive database with which the user property is to be compared is selected here. **User properties** are managed in the PROXESS Administrator Console. They are either copied automatically through Windows AD integration or entered manually. The desired field for the filter is selected here. The entries of these two fields are compared in a query by the user and, if the field values are the same, a correspondingly adjusted list of results is provided. For Index Mining groups, the following values can be selected in addition to the default user properties: **PROXESS user ID:** System ID of the logged-in user **PROXESS database:** Name of the currently connected database **PROXESS name:** Login name of the logged-in user **PROXESS full name:** Full name of the logged-in user Example: A company group consists of Company A and Company B. All employees receive the entry "Company A" or "Company B" in the "Company" field in the user properties in the PROXESS Administrator Console. All imported data records also receive the "Company A" or "Company B" identifier in the "Company" database field of the archive database. When an employee of Company A makes a query, only data records of Company A are presented for selection, and only data records of Company B for a query by the employee of Company B. **No filter:** If no filter is desired, this must also be selected as the setting.

Document type filter	The document type filter can be used to further filter results of mining based on the document type entered in the database. The selected PROXESS document type of the archive database is compared to the database field **DocType** (field name for the document type) here. Example: Document type purchasing invoice (130) is selected as the document type filter. With this, only mining results with the value purchasing invoice (130) in the BaseData database field ***DocType*** are taken into account. This kind of data record can be created with a constant when importing the master data. **No filter:** If no filter is desired, this must also be selected as the setting.
Document filter	**My documents only:** Searching only occurs in documents created by the logged-in user. **Only documents of the current document type:** Only those documents are displayed which have the same document type as the document through which the query process was initiated.
General field mapping and field settings	Here you can specify which fields are part of the mining process and whether input or output fields are involved in each case. Mapping between input and output fields (as with the Base Data Miner operating mode) is not necessary here.
Query field	If this field is filled in with values, a master data search with its contents is initiated.  A field can be a query field and a result field at the same time.
Search behavior	**No query field:** If the field is not a query field, a search behavior does not need to be selected. **Exact:** With an exact search, the only hits displayed are those which correspond exactly to the entered value. **Prefix:** The prefix search provides all results which begin with the entered characters. **Full-text:** The full-text search searches for hits where the entry occurs within this field.

Result field	A result field is filled in with the values from BaseData following a successful query.  If a field is declared as a result or information field, the entry in the Search behavior field is irrelevant. A field can be a query field and a result field at the same time.
Information field	This field is displayed in the hitlist following a successful query of the master data, but not filled in. An information field can be neither a query field nor a result field.  If documents already indexed by the Base Data Miner are to be mined again, field values already filled in can be overwritten.
Search behavior	**No query field:** If the field is not a query field, a search behavior does not need to be selected. **Exact:** With an exact search, the only hits displayed are those which correspond exactly to the entered value. **Prefix:** The prefix search provides all results which begin with the entered characters. **Full-text:** The full-text search searches for hits where the entry occurs within a field. **Note:** If a field is only declared as a result or information field, the search behavior entered here is irrelevant.

Pre-allocation	Pre-allocation can be defined for each output or information field. This value is then automatically suggested for use in all hits for which this field is empty in the master data record. The following values have a special meaning: **No pre-allocation:** There is no pre-allocation. If the field in the mined document is empty, it is also returned empty in the mining result. **Date:** Inserts the current date. Example: The pre-allocation of the **CuDeCountry** field is “Germany”. A master data search yields the following hits: { CuDeNam: "Gastro Ltd", CuDeNo: "12345", **CuDeCountry: <no_value>**}, { CuDeNam: "Furniture Fix Ltd", CuDeNo: "24246", CuDeCountry: "Switzerland"}, { CuDeNam: "Ultramed Co", CuDeNo: "998552", CuDeCountry: "Germany"} { CuDeNam: "Speedo Ltd", CuDeNo: "110112", **CuDeCountry: no_value**} The following master data records are then suggested for use in the document: { CuDeNam: "Gastro Ltd", CuDeNo: "12345", **CuDeCountry: "Germany"**}, { CuDeNam: "Furniture Fix Ltd", CuDeNo: "24246", CuDeCountry: "Switzerland"}, { CuDeNam: "Ultramed Co", CuDeNo: "998552", CuDeCountry: "Germany"} { CuDeNam: "Speedo Ltd", CuDeNo: "110112", **CuDeCountry: "Germany"**}
Remove	After selecting the corresponding row, you can delete the field from the list by clicking the **Remove** button.
Up/Down	Here you determine the column order in which the fields appear to the user in the master data selection list.
OK	Clicking **OK** creates the entire group and closes the settings window. This group is then displayed in the overview of the editor.

Before exiting the PROXESS Management Console or before logging out, you have to explicitly save the settings you made. For this purpose, select the **Apply settings** function in the context menu of the module.

Alternatively, you can select the **Apply all settings** function in the context menu of the PROXESS server. With this, the settings of your entire session are saved for all modules.

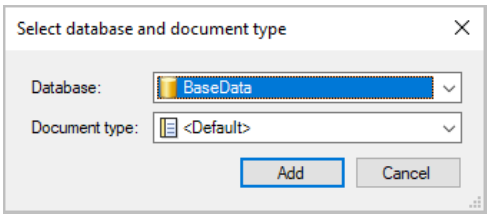
If the settings are not applied, the changes of the current session will be lost. Only when changes are saved are they then sent to the PROXESS server and available at every workstation.

Creating and editing a mining profile (Index Miner)

Step by step

1. On the home page of the PROXESS Management Console, select the **PROXESS Data Miner** profile or add it if it has not been created yet (see also the following topic: Adding a module)

2. Create a new profile using the context menu by selecting the desired PROXESS server and the desired group or an individual user. For this purpose, select the archive database and a document type or "Default" for all document types for which the query is to be carried out. (see also the following topic: Adding a profile).



3. The profile is now created. A new entry, "**Configuration**", appears on the left, and a new entry "Mining profile" on the right.

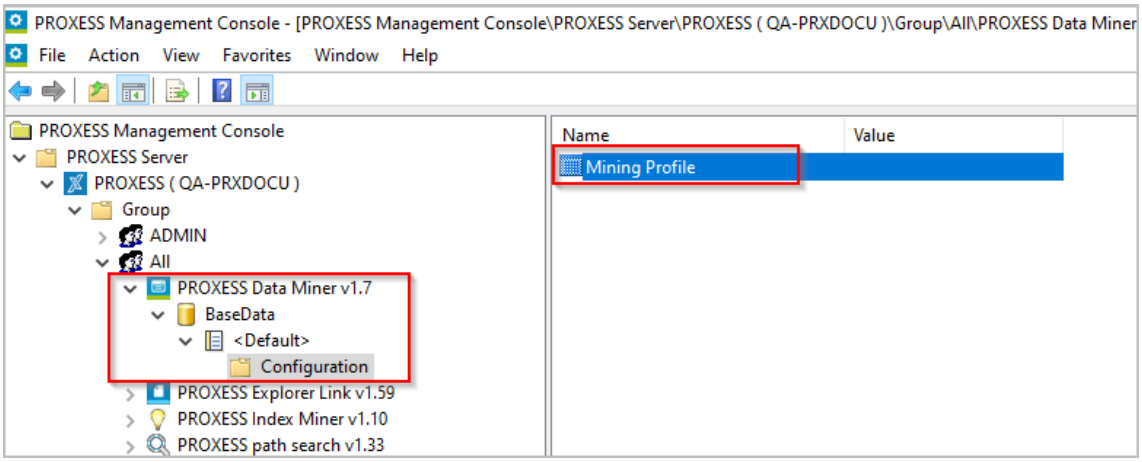


Fig.: Data Miner profile

The configuration editor can now be opened by double-clicking Mining profile:

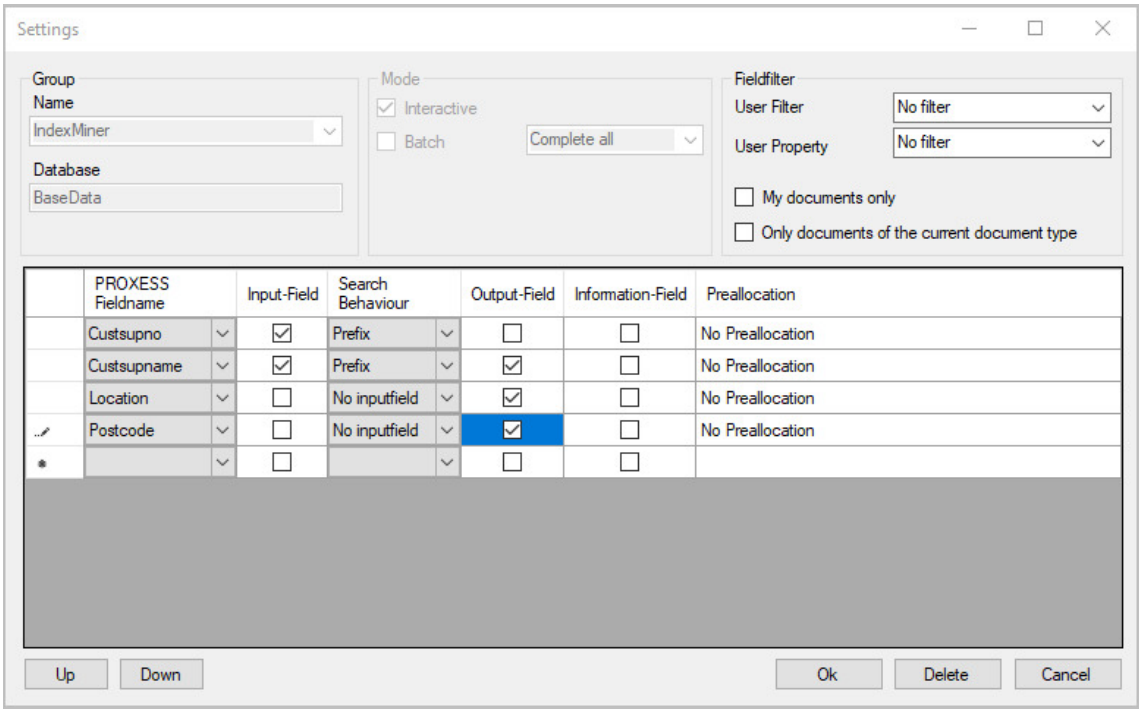


Fig.: Configuration editor for an Index Miner group

Here you specify which fields are to be used as query fields or result fields. These settings are made in what are known as mining groups.

In this example, the customer/supplier number or customer/supplier name are defined as query fields and the associated customer/supplier address data such as the city and ZIP code are defined as the result fields.

Further explanations on setting up an Index Miner group can be found here:
Creating a mining group (Index Miner)
Configuring a mining group (Index Miner)

	Before exiting the PROXESS Management Console or before logging out, you have to explicitly save the settings you made. For this purpose, select the **Apply settings** function in the context menu of the module. Alternatively, you can select the **Apply all settings** function in the context menu of the PROXESS server. With this, the settings of your entire session are saved for all modules. **If the settings are not applied, the changes of the current session will be lost.** Only when changes are saved are they then sent to the PROXESS server and available at every workstation.

Selecting the operating mode

After calling up a profile, the operating mode/provider must first be selected.

Either the PROXESS Base Data Miner mode or the PROXESS Index Miner mode can be selected. Simultaneous operation of both versions is not possible.

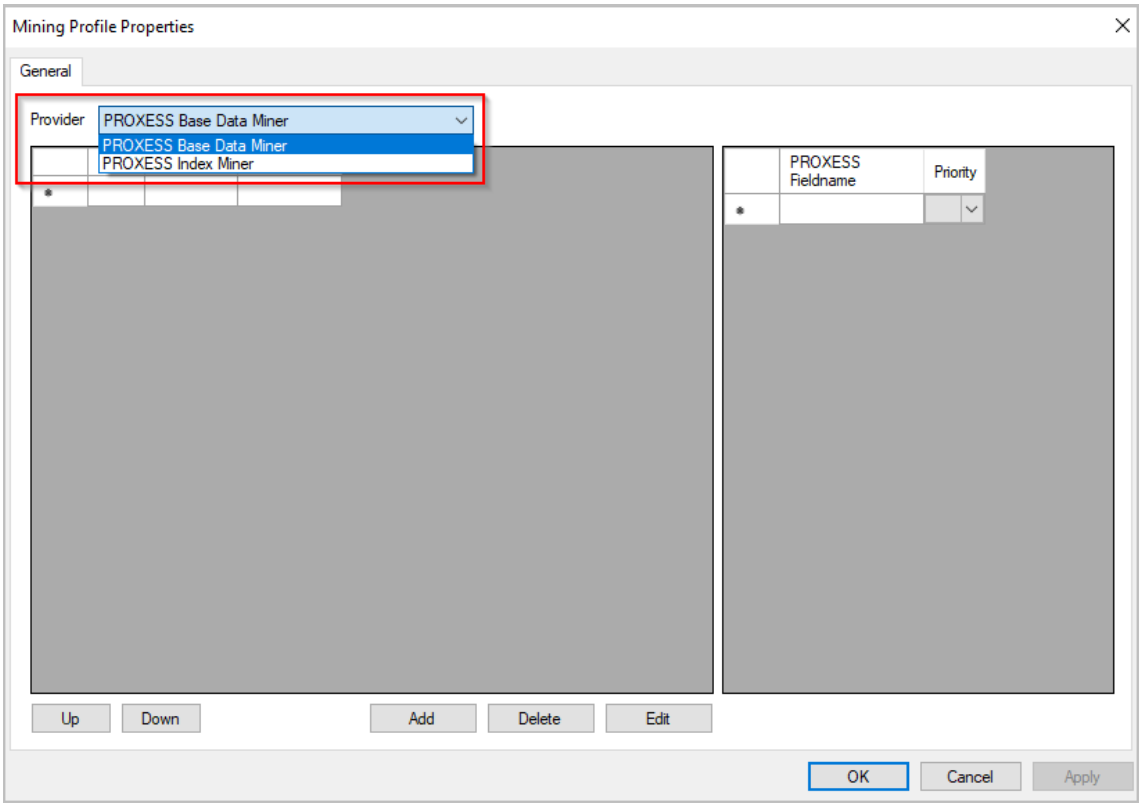


Fig.: Selecting between PROXESS Base Data Miner and PROXESS Index Miner

	If the operating mode is changed, the entire profile is reset to the initial state. In order for this to not occur accidentally, the user is alerted to this with a warning message.

About PROXESS Data Miner

This module enables the direct copying of index information for a selected document from other documents or master data.

The PROXESS Data Miner module supports two different operating modes here, which use different sources for adding to the documents:

PROXESS Base Data Miner
A separate PROXESS database with the fixed name **BaseData** serves as the source. During the configuration, the fields of the archive database to be added must be mapped to the corresponding fields of the master database.

PROXESS Index Miner
The archive database itself serves as the source, i.e. searching occurs in the existing documents of the current archive database (with additional filters if applicable).

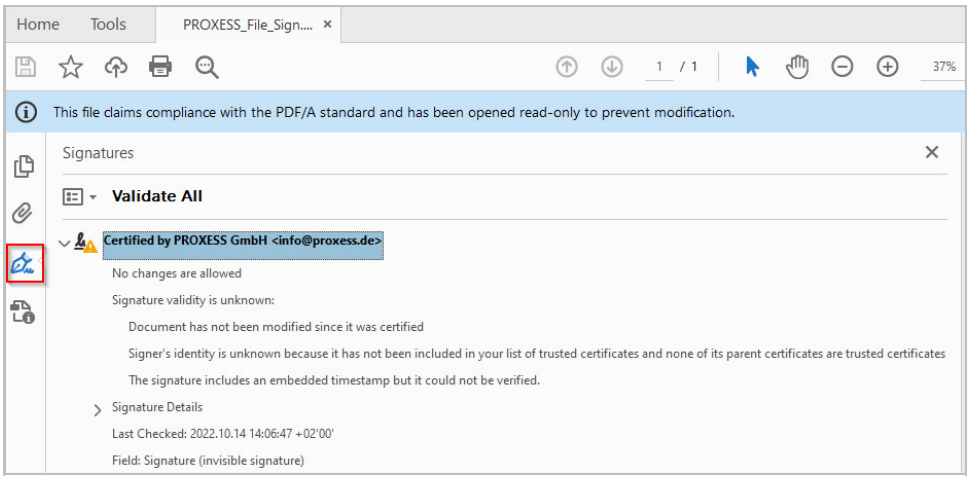
	The **PROXESS Index Miner** described here is introduced as of PROXESS 10 2022 R1 (version 13.0) and supersedes the previous PROXESS Index Miner module. This new version enables index mining with the PROXESS Web Client as well. If the **PROXESS Data Miner** is not licensed, the previous PROXESS Index Miner module can still be used. This makes index mining possible in the PROXESS Windows Client and in desktop link modules like PROXESS Office Link, Scan Link and Outlook Link.

Structure of a signature with the Document Signer

A complete signature contains the following elements:

- the signed document
- the path of the signed file
- the result of signing: signing was successful/signing was not successful.

With a PDF file, the signature can be displayed using the signature symbol:



Settings of the Document Signer

You have already added the PROXESS Document Signer as a module.

You have also created a new profile either for a group or for a user or selected an existing profile.

The following dialog box appears, which is still empty during the initial setup:

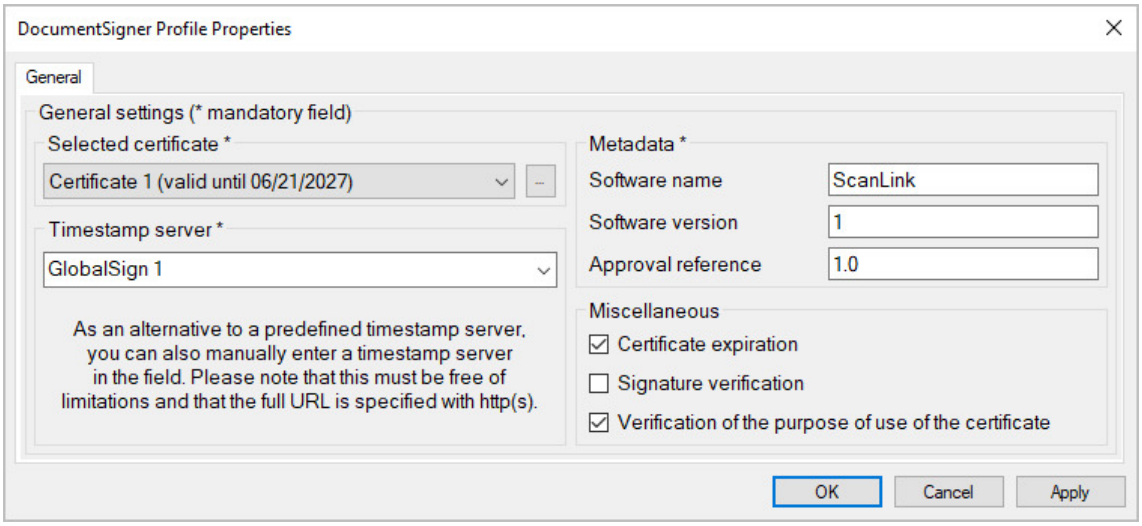


Fig.: General properties of the PROXESS Document Signer

You define the settings for the signing of documents here.

General settings	
Selected certificate	The desired certificate is selected using the dropdown menu of the interface. The list of existing certificates can be opened using the "..." button to the right of the dropdown menu. (see certificate list) After selecting the certificate, the other settings can be made.
Time stamp server	URLs in HTTP/HTTPS format are supported here. The specified time stamp server has to be free of limitations. Alternatively, a time stamp server can be selected from the existing list.
Metadata	The **Software name, Software version and Release reference** values are written to the metadata of the PDF file during signing.
Miscellaneous	

Certificate expiration	If activated, the validity of the certificate is checked during configuration of the PROXESS Document Signer library. If the certificate has expired, signing cannot occur.
Signature checking	If this option is activated, the validity and integrity of the certificate is checked during configuration of the PROXESS Document Signer library. If this no longer applies to the certificate, signing cannot occur.
Checking the intended purpose of the certificate	If this option is activated, suitability of the certificate for digital signing is checked during configuration of the PROXESS Document Signer library. If the certificate does not possess this property, signing cannot occur. If all mandatory fields were filled in in the interface (marked with *), the configuration can be saved by pressing the Apply and OK buttons.

Certificate list

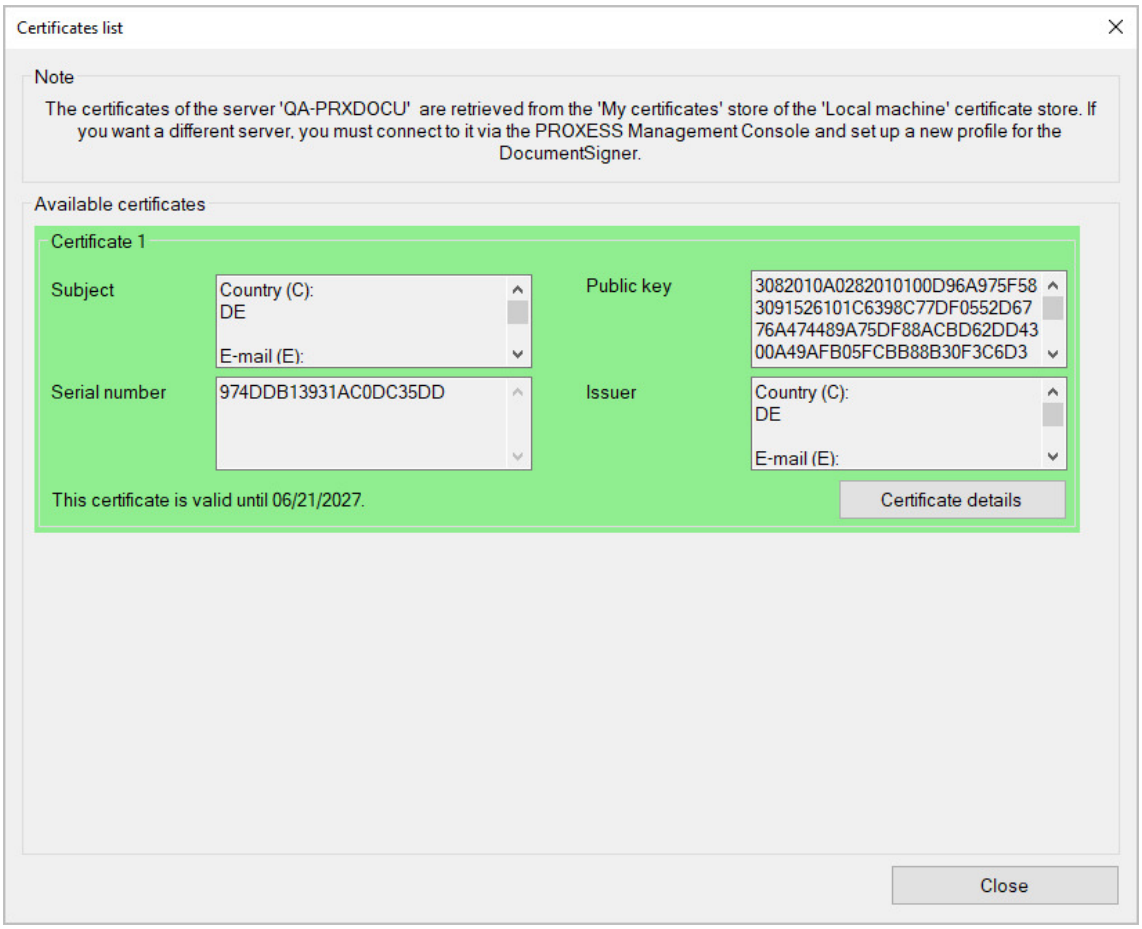


Fig.: The certificate list

The names of the certificates are numbered consecutively from 1 to n and match the names in the certificate view (at the top left of each certificate).

The certificate view displays all certificates which are accessible to the user logged into the PROXESS Management Console. Information on each certificate is specified here. Further details on the certificates can be called up using the respective **Certificate details** buttons. If a certificate has already been selected, it is given a green background and moved to the top of the list.

	Before exiting the program or before logging out, you have to explicitly save the settings you made. For this purpose, select the **Apply settings** function in the context menu of the module. Alternatively, you can select the **Apply all settings** function in the context menu of the PROXESS server. With this, the settings of your entire session are saved for all modules. **If the settings are not applied, the changes of the current session will be lost.** Only when changes are saved are they then sent to the PROXESS server and available at every workstation.

About PROXESS Document Signer

PDF, TIFF, database DMP and other text files can be signed with the PROXESS Document Signer. The signature confirms the integrity (immutability) of the document.

In this way, paper documents scanned using the PROXESS Scan Client can automatically be given a qualified digital signature and archived. This type of signature is a legal requirement in some countries for ensuring and being able to verify the integrity (immutability) of archived documents. In addition to signing scanned documents (PDF files), the signing of PROXESS database backup files is also required.

You can activate and configure these functions in the PROXESS Document Signer.

PROXESS Explorer Link settings

You have already added the PROXESS Explorer as a module and selected a module profile for a user group, an archive and a document type. The following dialog box showing the setting options for the PROXESS Explorer Link then appears:

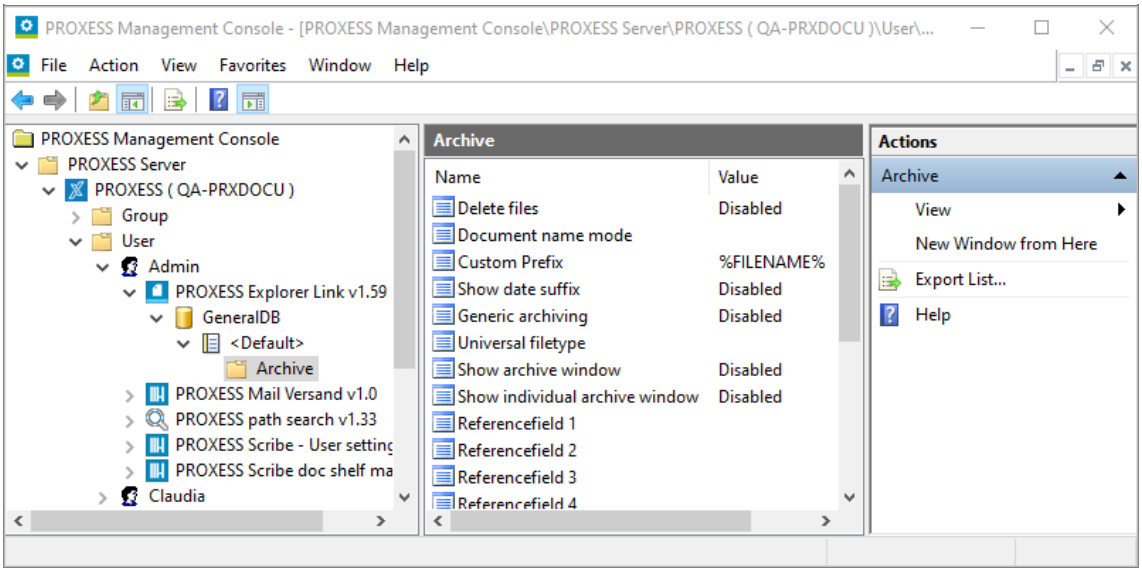


Fig.: Settings of the PROXESS Explorer Link (in this case, "Default profile" for all document types in the "General" database for the "Admin" user)

The following settings are possible:

Delete file	If this option is activated, the files are deleted following successful archiving. If no other operating system settings were made, the deleted files are moved to the recycle bin of the respective computer.
Document designation	The name borne by the document in the PROXESS archive is specified here. The document name (PROXESS default field: Name) is a "core field" of every PROXESS document and therefore must be filled in in every case. Otherwise, archiving of the document is not possible. The following options are available for filling in the document name: Date = default setting, e.g. 1/1/2011 File name = name of the file, without a file extension, to be archived User-defined prefix = user-defined entry which must be defined more precisely in further settings If it is indicated that the indexing mask is to be shown interactively (see below), these specifications can still be corrected or supplemented manually.

User-defined prefix	A “user-defined prefix” selected above is described in more detail here. The following constants are available: %FILENAME% File name (e.g. winter.pdf) %EXTENSION% File extension (e.g. pdf) %DATESHORT% Short date (e.g. 1/1/2011) %DATELONG% Long date (e.g. Thursday, October 1, 2010) %BARCODE% Bar code number %PROXESSUSER% Short name (e.g. Smith) %PROXESSUSERFULL% Full user name (e.g. Joe Smith) During archiving, these constants are copied to the character sequence with their equivalent values. Please pay attention to capitalization when entering the constants. Example: The “Admin” user archives the “Winter.pdf” image. The specification “File %FILENAME%.%EXTENSION% archived by %PROXESSUSER%” results in the document name: “File Winter.pdf archived by Admin” Bar code generation using %BARCODE%: If this constant is used, a bar code number is generated with a random number generator. (Also see: Digression: Example configuration for SHD users)
Display date end digits	Specifies whether the date end digits are to be added to the end of the prefix of the user-defined document mask.
Universal archiving	Specifies whether file types unknown in the PROXESS system are archived using a universal file type. When displaying a universal file type, the respective workstation settings are searched for a suitable application.
Universal file type	Specifies the universal file type to be used with unknown file types. The “Universal file type” must be created in the PROXESS Administrator program beforehand.
Display indexing mask	Specifies whether the indexing mask is to be displayed prior to final archiving.

Display user-defined mask	Specifies whether a (smaller) user-defined indexing mask is to appear. The user-defined indexing mask is different from the default indexing mask in PROXESS. Use the reference assignments of fields 1 through 4 (see below) to control this dialog. Only the fields activated below are displayed to the user in the user-defined indexing mask. In the next step, the familiar indexing mask for checking (if activated) then appears as the next dialog. Note: If you have also activated automatic bar code generation, these bar code numbers will still be generated in the background and used for indexing. (Also see: Digression: Example configuration for SHD users)
Reference field 1	Specifies the first index field of the user-defined mask to be filled in. The content of this field is always also used for generation of the document name here. You can select the reference field using the pull-down menu from the list of your created default fields/document fields.
Reference field 2	Specifies another index field of the user-defined mask to be filled in. You can select the reference field using the pull-down menu from the list of your created default fields/document fields.
Reference field 3	Specifies another index field of the user-defined mask to be filled in. You can select the reference field using the pull-down menu from the list of your created default fields/document fields.
Reference field 4	Specifies another index field of the user-defined mask to be filled in. You can select the reference field using the pull-down menu from the list of your created default fields/document fields.
Date reference field	Select a field with the “DATE” data type here. This is then automatically filled in with the date (e.g. 1/1/2011).

Create bar code	If this option is activated, an automatic bar code number is created with each archived document and entered in the indexing mask. In addition, the created bar code number is located in the Windows clipboard.  Activate this function so that users can add individual documents to processes in an integrated ERP system.
Bar code field	Assignment of the document type field in which the created bar code number is entered. This field must be of data type VARCHAR. The field is only filled in if bar code generation has been activated above.
Bar code type	Here you specify the bar code type to be used in this PROXESS module. “PROXESS” type: 8- or 10-digit bar code number with or without 2-digit check number (depends on the “Add bar code check number” function). Only “Lower bar code range” needs to be configured for the bar codes. “Standard (7+1)” type: 7-digit bar code with or without 1-digit check number (depends on the “Add bar code check number” function). “Upper bar code range” and “Lower bar code range” need to be configured for the bar codes. Type: “Standard (13+1)”: 13-digit bar code with or without 1-digit check number (depends on the “Add bar code check number” function). “Upper bar code range” and “Lower bar code range” need to be configured for the bar codes.
Bar code prefix	This field defines the first two digits of the bar code. The default setting is “00”. Using this “number range setting”, overlapping with other bar code number ranges, e.g. via bar code label printing or through the generation of logical bar codes from document numbers, can be avoided.
Bar code range	Specifies the length of the created bar code number (without check number) and the lower limit from which the bar code numbers are created.
Add check number to bar code	Adds a 2-digit check number at the end of the bar code.

	Before exiting the program or before logging out, you have to explicitly save the settings you made. For this purpose, you can select the “Apply settings” function in the context menu of the module. Alternatively, you can select the “Apply all settings” function in the context menu of the PROXESS server. With this, the settings of your entire session are saved for all modules. **If the settings are not applied, the changes of the current session will be lost.** Only when changes are saved are they then sent to the PROXESS server and available at every workstation.

See also:

About PROXESS Explorer Link
Digression: Example configuration for SHD users

Digression: Example configuration for SHD users

A convenient configuration for SHD users for the convenient indexing of files archived from your personal workspace using the PROXESS Explorer Link is yielded using the following settings:

- User-defined document prefix: “PA”.
- Activation of the user-defined document mask
- Reference field 1 = “CUNO” for the customer/order number

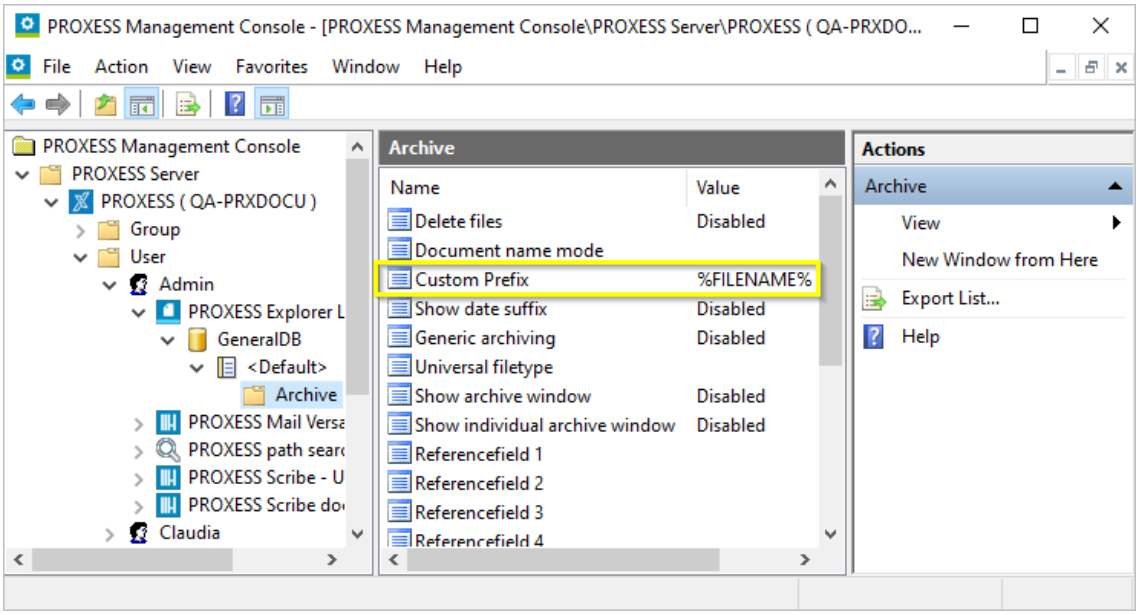


Fig.: Relevant configuration entries “User-defined prefix = PA” and reference field 1 = “CUNO”

Entering the date end digits in the user-defined indexing mask then automatically completes the document name of the purchase agreement number as it is known in MHS.

The title of the document is then filled in automatically, for example via PA + date end digits + individual PA number as **PA10123456.**
If the documents are indexed in this way, they can be captured and displayed via immediate query from the MHS system (known as “DA query”).

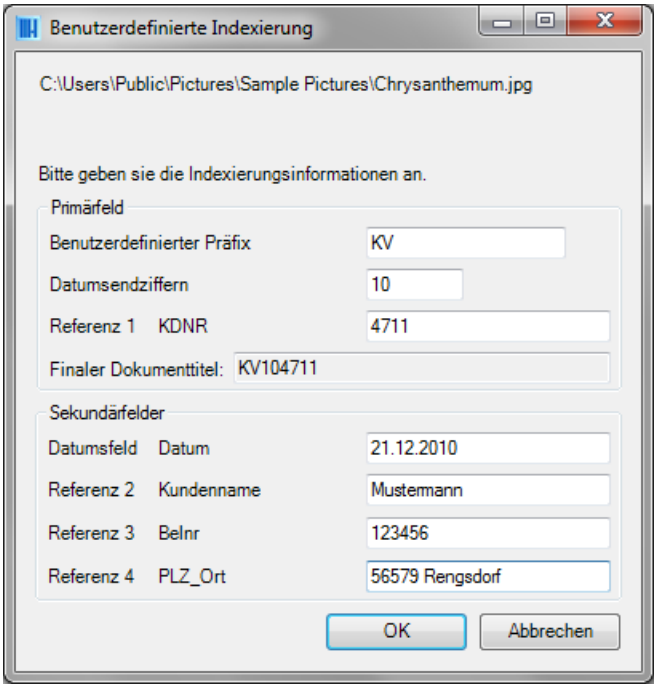


Fig.: User-defined indexing mask for SHD users

A bar code can still be generated automatically when archiving via the PROXESS Explorer Link, which is then copied to MHS when creating the document.
The “Generate bar code” and bar code field setting options are used here. The “User ID” field is automatically filled in with a two-digit number. This specifies the number range of the generated bar code so that overlapping with other printed bar codes cannot occur.

See also:

Explorer Link settings

About PROXESS Explorer Link

About PROXESS Explorer Link

The PROXESS Explorer Link is used for the fast archiving of documents found on the desktop or in any folder of Windows Explorer.

Archiving is carried out via the respective context menu with the **Archive in PROXESS** or **Archive grouped in PROXESS** command if several files are to be saved in a common PROXESS document.

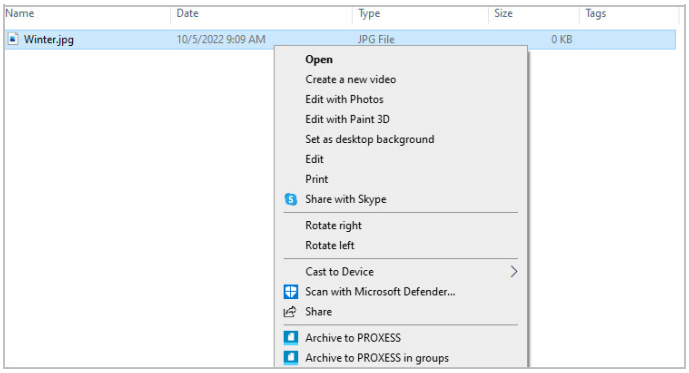


Fig.: Archiving the "Winter.jpg" file from Windows Explorer using the context menu

The PROXESS Explorer Link offers very versatile configuration options. For example, there is an "Automatic bar code generation" option and the handling of file types which have not yet been created in PROXESS using the **PROXESS Administrator** program. The degree of automation of indexing can also be specified, i.e. whether the indexing mask is displayed interactively or whether certain specified properties and values are to be used for archiving.

See also:

Explorer Link settings

Digression: Example configuration for SHD users

Setting file conversion

Select the **Conversion** folder.

This is where you manage the saving of images in the suitable PROXESS data type. PROXESS file types are created and configured in the “PROXESS Administrator” program. If necessary, contact your system administrator. PROXESS file types are always created for each archive or PROXESS database.

The following image formats are available for selection:

- JPEG
- PNG
- BMP
- GIF
- TIFF

Individual conversion options can be set for the image formats listed here. For image formats converted to the JPEG format, the compression settings specified on the “Processing” tab then also apply during the archiving procedure. In this way, large BMP files or large TIFF files can be archived in PROXESS with a small file size, for example. This ensures quick display of images during retrieval by the user later on.

Properties of the document name with the default mask

Select the **Default document name** folder.

Here you determine the document name of the archived images. The settings described here are possible if the "Default mask" option was selected beforehand. You can check whether the default mask was selected in the **Set configuration/indexing mask** folder:

Default document name	Here you specify whether the first field, "Document name", of the indexing mask remains empty, whether the name of the file to be archived is entered or whether a text you specify appears as the pre-allocation. The following values are possible: No entry = The document name is not pre-allocated. Entry must occur manually during archiving, as this field is a mandatory field. %FileName% = The image file name appears as the pre-allocation. %xyz% = A desired user-defined entry is used as the pre-allocation.

Properties of a user-defined document name

Select the **User-defined document name** folder.

Here you determine the document name of the archived images. The settings described here are possible if the "User-defined" option was selected beforehand. You can check whether the user-defined indexing mask was selected in the **Set configuration/indexing mask** folder:

User-defined document name	Here you specify whether the first field, "Document name", of the indexing mask remains empty, whether the name of the file to be archived is entered or whether a text you specify appears as the pre-allocation. The following values are possible: No entry = The document name is not pre-allocated. Entry must occur manually during archiving, as this field is a mandatory field. %FileName% = The image file name appears as the pre-allocation. %xyz% = A desired user-defined entry is used as the pre-allocation.
Reference field	This appears on the user-defined indexing mask during archiving. The content of the reference field, together with the document prefix and the date end digits, specifies the document title (i.e. document name). In the selection list, select a PROXESS field from the database selected above.
Text field	The text field is also displayed during archiving and can be freely filled in. Here you can specify whether the content of the text field is to be inserted into an index field of the document mask. If it is, select a suitable index field of the database selected above from the selection list.
Date field	Here you can specify whether the date field of the user-specific indexing mask is linked to a date field in PROXESS. The field is automatically pre-allocated with the date (e.g. 3/30/11) during archiving and can be changed manually if necessary. If it does, you can select a date field of the target database using the selection mask (e.g. the document date).
Document prefix	If desired, you can provide the document name with a prefix (e.g. "PA" for purchase agreement). If the field remains empty, the document name is formed without a prefix.

Display date end digits	If this option is activated, a two-digit year number (e.g. 11 for 2011) is used in the document name. If this option is not activated, a year number does not appear in the document name.
Write reference field value in text field automatically	With this, you can automatically duplicate the entries of the reference field and have them entered in the text field.

Configuration of the basic settings

Universal file type	The universal file type facilitates the import and management of file types. If this option is selected when creating a file type, the suitable program is read out of the local registry when importing a file and, if there is an entry there, the correct file extension is added to the file. The suitable program is also looked for in the registry and called up automatically when viewing a file. This avoids the need to create and configure all possible file types separately in PROXESS. In the selection list, choose the file type previously set up as the universal file type by the administrator in the PROXESS Administrator program.
Display indexing mask	Here you specify whether the default mask or a user-specific indexing mask is to be displayed for the purpose of indexing. These values are possible: %Default% --> The default mask is displayed. If the PROXESS Index Miner is activated for your user profile in the PROXESS Management Console, you get a default indexing mask with integrated PROXESS Index Miner. %User-defined% --> A user-specific indexing mask is displayed. With this option, the "User-defined document name" section is activated automatically as well.
Archiving mode of the marked images	Activated: If this option is activated, all marked images of the left-hand selection window are compiled in a PROXESS document and archived. With this, joint indexing for the selected images is also possible. This makes sense when different detailed views of a complaint are to be compiled in a document in PROXESS, for example. Deactivated: If this option is activated, each of the marked images is archived and indexed as a separate PROXESS document. This option makes sense if a large number of images with the same file and archive settings are to be archived. With this, the archiving process only needs to be initiated once and the marked images can be indexed one after another.

Activate update mode	Whether documents which are already archived are updated with the latest specifications (Update) or whether a new PROXESS document is always created is specified here. The following values are possible: Activated: Documents which have already been archived are overwritten with the new specifications and updated. Deactivated: In this case, a new PROXESS document is always created. **The settings made here only take effect when using the user-defined indexing mask.** **When using a default indexing mask or indexing mask with PROXESS Index Miner, update options cannot be used.**
Display indexing report	If this option is activated, a detailed archiving log is displayed after each archiving procedure. If this option is not activated, you only get the “Archiving successful” or “Archiving unsuccessful” response.
Delete with DEL key	The directory structure in the left-hand window of the PROXESS Image Link mask reflects part of Windows Explorer. If this option is activated, displayed images can be deleted with the DEL key. If this option is not activated, images can only be deleted using the context menu (Right mouse click + Delete).
Backup	**No backup**: Here, the images are not moved to a previously specified folder following archiving. Instead, they remain in their original location in the archiving folder. **“Done” folder**: Following successful archiving, the files are moved to a subdirectory called “Done”. This makes it easier to have an overview of the files which have already been archived in PROXESS.
Display JPEG compression dialog	Specifies whether the dialog for JPEG compression of image data is always to be displayed when archiving.

JPEG compression dialog

Oftentimes, digital image data is still in very large files immediately after capture. For this reason, PROXESS handles the reduction or compression of JPEG files automatically during the archiving procedure so that a manual pre-processing step is not necessary. In this case, the “Deactivated” setting is to be selected.

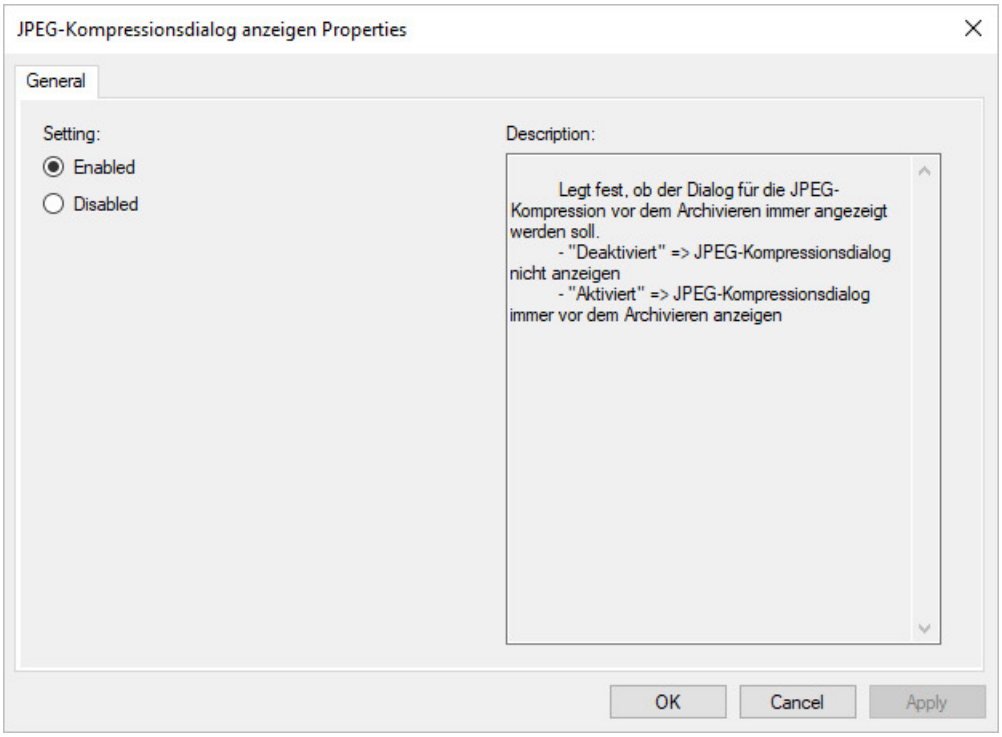


Fig.: Setting options in the PROXESS Management Console for the JPEG compression dialog

Activated	The JPEG compression dialog is displayed during the archiving process in the PROXESS Image Link (see explanations below).
Deactivated	The JPEG compression dialog is not displayed during the archiving process in the PROXESS Image Link. Standard compression is carried out automatically by PROXESS.

If you have selected the “Activated” option, this dialog box will appear in the PROXESS Image Link during the archiving procedure.

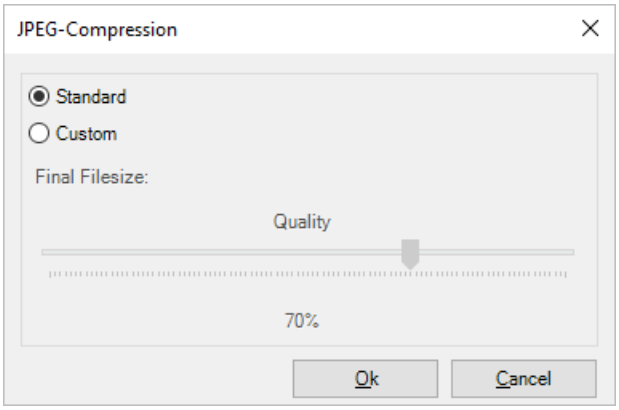


Fig.: Dialog box in the PROXESS Image Link for the image compression settings of JPEG files

Explanations of the settings:

Standard	PROXESS standard compression is used.
User-defined	Moving the slider on the quality bar changes the degree of compression. The “Final file size” is displayed online. At the same time, the qualitative image result when changing the quality slider is displayed online (real-time preview). If you would like to have image formats other than JPEG compressed as well, combine these settings with the settings in the “Conversion” folder. In this way, you can have other image formats converted to JPEG files in advance and the compression settings set here then apply for BMP files as well, for example.

Update mode for documents

Select the **Update mode** folder.

Settings for document updating can be made here. By default, all settings are deactivated. This means that document updating does not occur.

If you enter corresponding conditions, the index values of the image to be archived are compared with documents already archived in PROXESS. If a suitable document is found in PROXESS, the new image file is added to the found document and the existing index values of the document are also updated.

	**The settings made here only take effect when using the user-defined indexing mask. When using a default indexing mask or indexing mask with PROXESS Index Miner, update options cannot be used.**

Important: When selecting several of the fields listed below, all search criteria have to apply (AND operation).

Document name	The comparison in the document name field can be set as follows: “=” means that the search term has to precisely match the found value or “LIKE” means that a similarity search is carried out. This corresponds to a PROXESS search with the placeholder “%”. No entry means that a comparison is not carried out in this field.
Document type	The comparison in the document type field can be set as follows: “=” means that the search term has to precisely match the found value or “LIKE” means that a similarity search is carried out. This corresponds to a PROXESS search with the placeholder “%”. No entry means that a comparison is not carried out in this field.

Reference field	The comparison in the reference field can be set as follows: “=” means that the search term has to precisely match the found value or “LIKE” means that a similarity search is carried out. This corresponds to a PROXESS search with the placeholder “%”. No entry means that a comparison is not carried out in this field.
Text field	The comparison in the text field can be set as follows: “=” means that the search term has to precisely match the found value or “LIKE” means that a similarity search is carried out. This corresponds to a PROXESS search with the placeholder “%”. No entry means that a comparison is not carried out in this field.
Date field	The comparison in the date field can be set as follows: “Activated” means that the date has to precisely match the found value or “Deactivated” means that a comparison is not carried out in this field.

Processing	Basic processing: When selecting several fields, all search criteria have to apply (AND operation). If one suitable document matching the search criteria set above is found, the image file is added to the found document and the existing index values of the document are also updated. If not, i.e. the search yields no hits or multiple hits, differentiation is made in further processing: “IndexData” = Enter new index data and repeat search. Here, the PROXESS user wants to add the digital images as a new file to a document which already exists. For this reason, archiving is reset and the search can be carried out again with different criteria until a suitable document is found or the archiving procedure is canceled. “NewDocument” = Create a new document. In this case, a new PROXESS document is created and archived with the digital image file. “SelectInDialog” = Selection dialog is displayed. The user can select between the two options mentioned above in each individual case here.

About PROXESS Image Link

The PROXESS Image Link is used for the quick and convenient archiving and indexing of digital image data in the PROXESS Archive.

A preview function supports archiving here. If desired, specific index fields can be pre-allocated or retained between two archiving procedures.

Using an integrated conversion function, the image data to be archived can be converted into another format, such as JPG or GIF, beforehand.

Settings of the PROXESS Index Miner

You have already added the PROXESS Index Miner as a module and selected a new profile for a user group, an archive and a document type.
The following dialog box showing the setting options of the PROXESS Index Miner in the center column then appears:

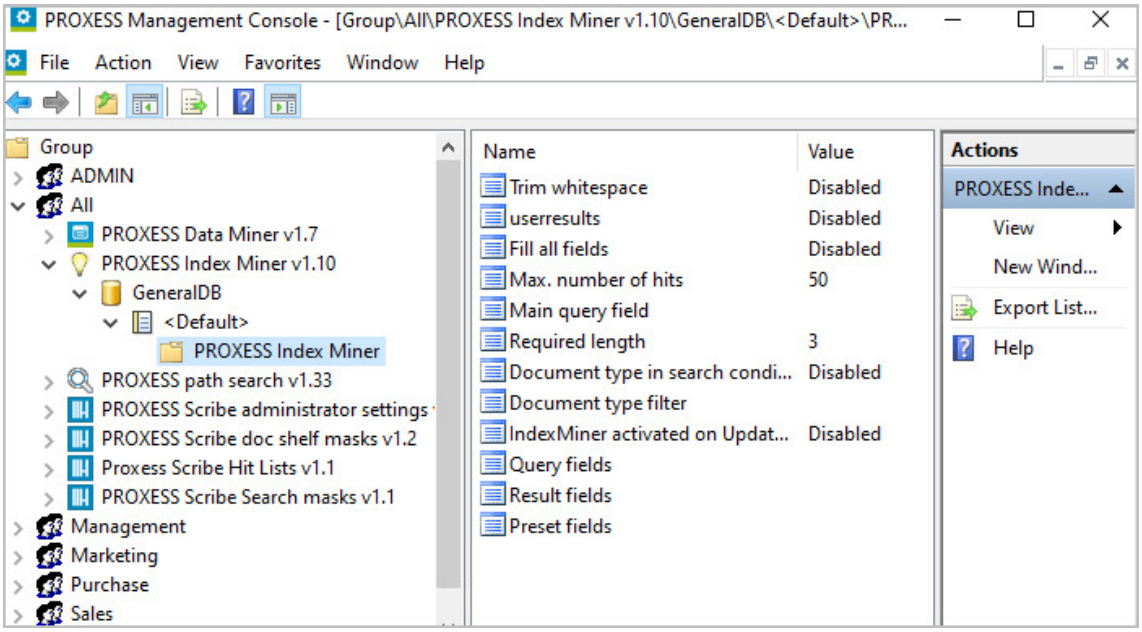


Fig.: Configuration options for the PROXESS Index Miner in the overview

You can make the following settings:

Ignore spaces	If this option is activated, leading and trailing spaces are removed from copied field content.
Only my document hits	Only those documents created or edited by the logged-in PROXESS user appear in the hit list. With this, the search can be restricted to documents from your personal workspace.
Fill in search fields completely	If this option is activated, the search for already archived documents does not begin until all defined search fields have been filled in. As with the field search, all fields are linked with AND for the query here. If this option is deactivated, it is sufficient if one of the query fields is filled in to initiate the search for “related” documents.
Maximum displayed hits	This option determines the maximum number of hits offered to the user in the hit list of the PROXESS Index Miner.

Main index field	The number of main index fields is specified here. If a search term is entered in a main index field, another search is carried out following the copying of indexing content. Conversely, no further searches can be initiated on any other search fields following copying. The main index field thus makes it possible to correct incorrect copying with a new search.
Minimum length	To avoid an unspecific search with a high number of hits, this option specifies a minimum number of characters which must be entered in order to initiate a search.
Use document type as search criterion	Only search results with the document type selected here are displayed.
Search in documents of the following document types	Specifies the document types in which the Index Miner searches for and displays existing entries. Multiple document types can be selected.
Query fields	One or more fields in which the entered search criteria are searched for are entered here. For example, the customer number can be selected as a query field to have the customer master data (customer name, street, ZIP code and city) automatically filled in as result fields.
Result fields	The fields to which found results are copied by the PROXESS Index Miner are specified here. If multiple results are found, the user is presented with a hit list and can select an entry.
Fields to be preset	Either fixed values or placeholders, e.g. for the current date {DATE} or the logged-in user {USER}, can be specified in the list of fields to be preset.
Attach file to the selected document	If the option is activated, the current file is assigned to the selected document from the hit list and archived. In this case, no new document is created and any field content already entered is not copied.
Hit list with preview of the files	The hit list is displayed with a preview of the archived files, through which the user can scroll.
Display selected document for editing	The selected archived document is displayed in the document mask, and the user then has the option to edit index fields. The new file has already been attached and archived.

Following configuration, the PROXESS Index Miner can be configured for the respective modules.

	Before exiting the program or before logging out, you have to explicitly save the settings you made. For this purpose, you can select the “Apply settings” function in the context menu of the module. Alternatively, you can select the “Apply all settings” function in the context menu of the PROXESS server. With this, the settings of your entire session are saved for all modules. If the settings are not applied, the changes of the current session will be lost. Only when changes are saved are they then sent to the PROXESS server and available at every workstation.

About PROXESS Index Miner

	The PROXESS Index Miner module is carried over into the PROXESS Data Miner module with PROXESS 10 Release 2022 R1. This means that index mining is also possible with the PROXESS Web Client. Separate licensing is required for this. **The module described in the following can still be used, but is not being further developed.**

PROXESS Index Miner supports users in manually indexing documents. Documents which have already been archived are displayed via specified query fields (e.g. “CUNo” as customer number), and their field values are suggested for copying.

The PROXESS Index Miner function can be activated in conjunction with the PROXESS Standard Client and can be linked with the PROXESS Outlook Link, PROXESS Explorer Link and PROXESS Printer Link modules to simplify the manual indexing process of documents. All settings for PROXESS Index Miner are made in the PROXESS Management Console (generally by an administrator). These settings include, for example, activation itself and the definition of which fields are query and result fields.

If the **PROXESS Index Miner** module (indexing version 1.5) has already been created in the PROXESS Management Console (see Adding a module), the following mask appears:

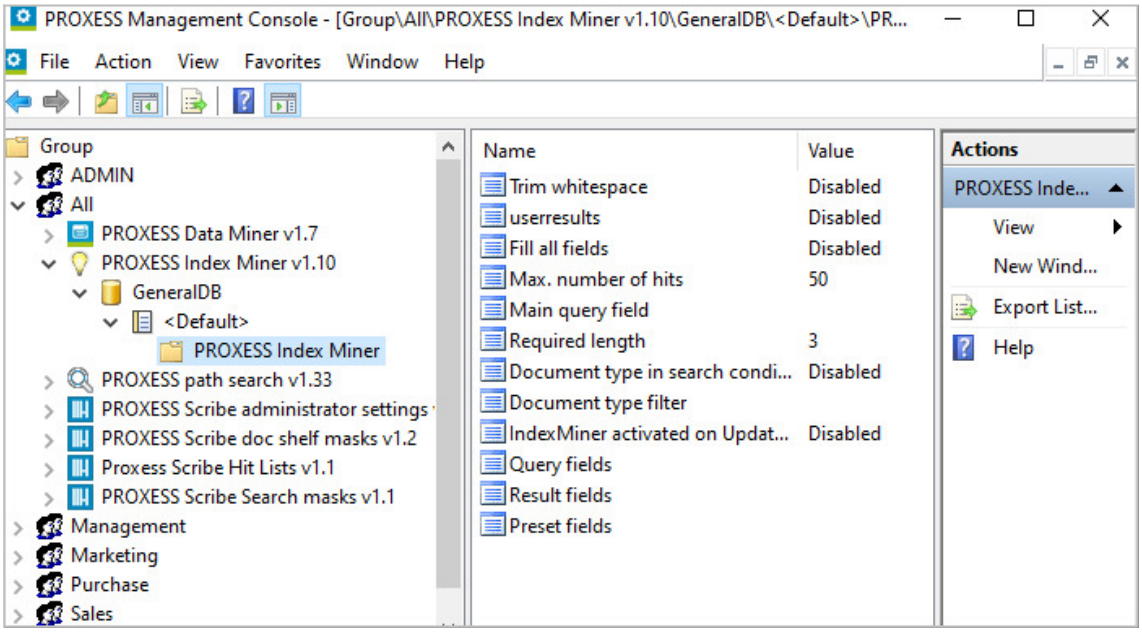


Fig.: Configuration options for the PROXESS Index Miner

The **PROXESS Index Miner** can be configured here and then used in conjunction with the **PROXESS Windows Client, PROXESS Scan Client, PROXESS Outlook Link**, **PROXESS Printer Link, PROXESS Office Link** and the **PROXESS Explorer Link**.

If the PROXESS Index Miner is activated and configured, the view changes to the indexing mask as follows:

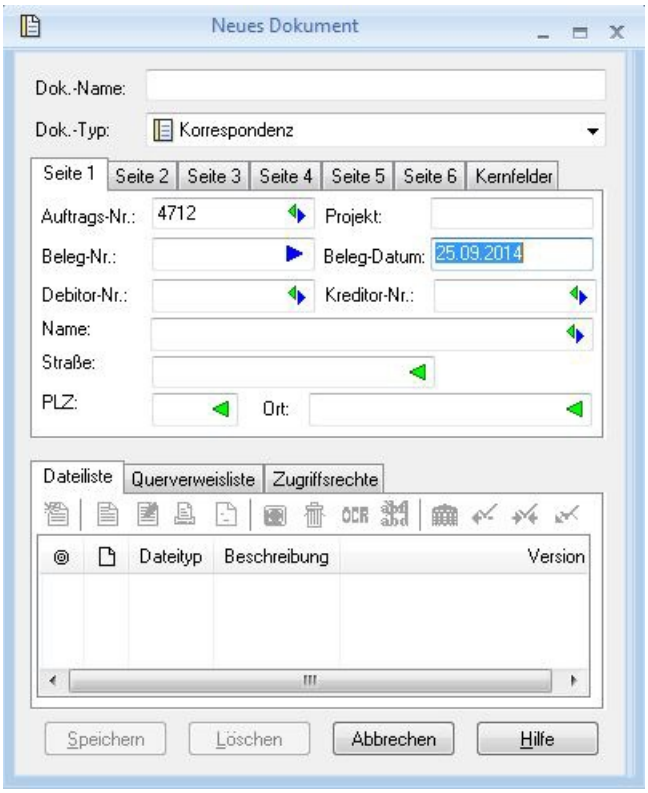


Fig.: Indexing mask with PROXESS Index Miner activated

Blue arrows indicate that these fields are query fields.
Green arrows designate result fields into which suggested and copied index values can be entered.
Fields without arrows can already be filled in now. The entries are then copied for indexing. In the example above, the date is always entered here automatically via presetting.

Example:
The order number, document number, vendor number and name fields marked with a blue arrow are possible query fields. The order number, debtor number, vendor number, name and address fields marked with a green arrow are result fields which are filled in automatically following a successful search if entries are available in PROXESS here.

3. Enter descriptive features in the query field or fields and leave the field by pressing the Tab key.

A hit list now appears with existing entries in the archive that correspond to the query values.

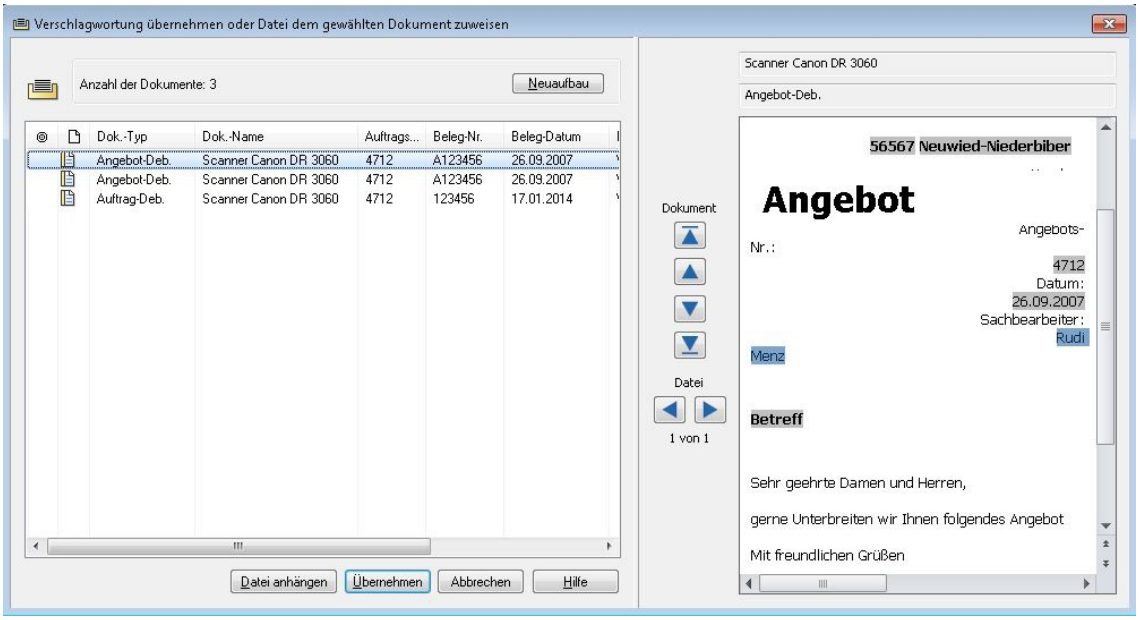


Fig.: Hit list following entry of customer number "4712"

In this example, the search has now found suitable documents with customer number "4712" via the PROXESS Index Miner. They are displayed in the hit list (see figure above).

4. Now you can archive the file as a new document and add the file to an existing document from the list.

Copy command (create a new document)
Mark a suitable entry in the hit list and select the **Copy** command. The values of the selected entry are now automatically copied to the result fields of your indexing mask.

Attach file command (add to existing document)
Mark a suitable entry in the hit list and select the **Attach file** command. The values of the selected entry are now automatically copied to the result fields of your indexing mask.

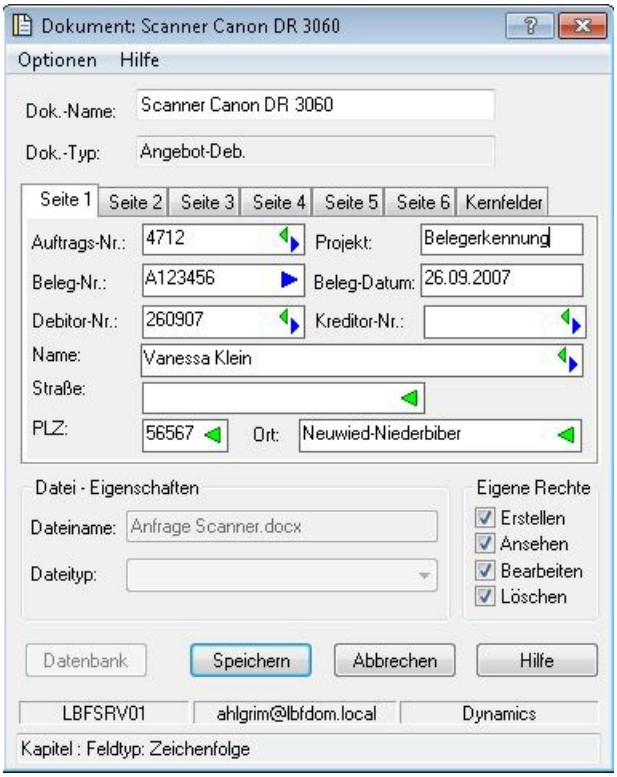


Fig.: Filled in indexing mask with the copied index values

Confirm the index values for the document with the **Save** command.

See also:

Adding a module

Settings of the PROXESS Index Miner

About PROXESS Emailing

PROXESS Emailing enables the automatic sending of archived documents via email. You can freely define which documents are sent.

Basic functional scope:

Following the specified interval, a check is carried out to determine whether relevant documents are present. They are sent to a defined email address. The document then gets a code to prevent resending.

The configurations for subject, contents of the email and naming of the attachments are controlled via XML/XSLT. All common XML/XSLT functions can be used.

All settings are made in a profile of the “PROXESS Emailing” module here in the PROXESS Management Console.

The actual automatic sending of emails is carried out by the PROXESS Job Server service. The setup and monitoring of jobs of the PROXESS Job Monitor service occur in the PROXESS Job Monitor app.

Sample application: PROXESS eBilling

With the “PROXESS eBilling” solution, outgoing invoices are not only archived legally compliant in PROXESS, but are also automatically sent from the PROXESS system to the customer by email. The copy of the sent email can also be archived in PROXESS for documentation purposes.

Requirements of PROXESS Emailing

Automatic PROXESS emailing is carried out by a service (PROXESS Job Server) in the background. In the PROXESS Job Monitor program, jobs are set up for this purpose and monitored as well.

Before you can add **PROXESS Emailing** as a new module in the Management Console, the following requirements have to be met:

- The “PROXESS Business Tools” have to be installed. This is a separate setup set.
- For the archive database concerned, a database field named “EmailID” with the properties shown below has to be created.

To create the field, switch to the “PROXESS Administrator Console” program:

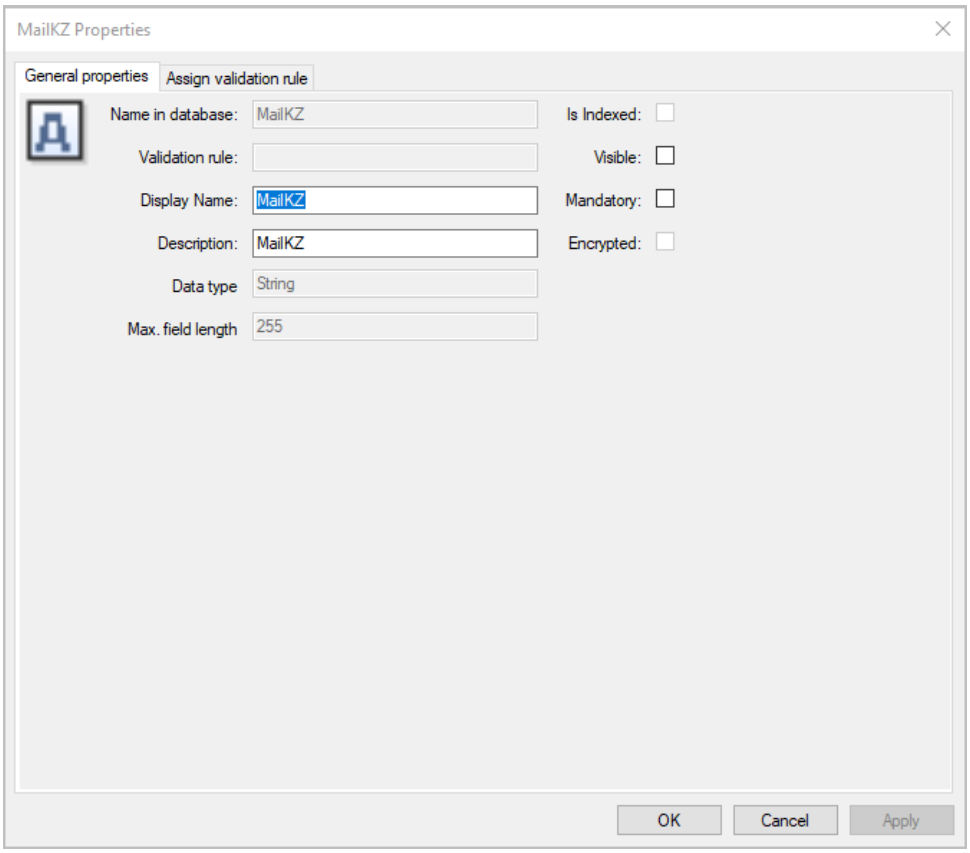


Fig.: Properties of the “EmailID” database field

- The “HpHab814.exe” program must be run once. Only after this is done is the “PROXESS Emailing” module available as a module for selection in the PROXESS Management Console.

The “PROXESS Emailing” module can now be added and a new profile created.

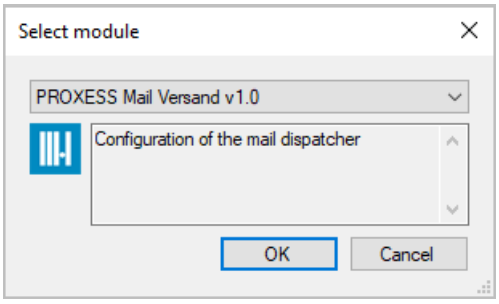


Fig.: Adding the "PROXESS Emailing" module

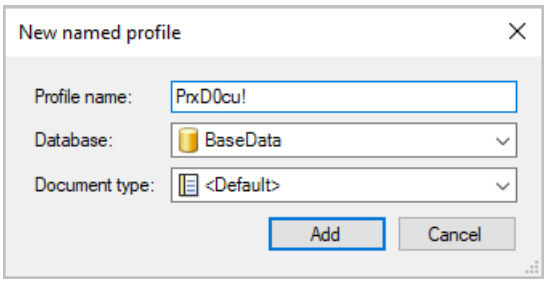


Fig.: Creating a new profile with the name "eBilling" for the "PROXESS Emailing" module.

See also:

Adding a module

Adding a profile

Configuration of PROXESS Emailing

	We recommend contacting the PROXESS system administrator for the setup and configuration of automatic PROXESS emailing. They will take your requirements, outline possible options and make the configuration.

Double-clicking the respective profile opens the settings dialog:

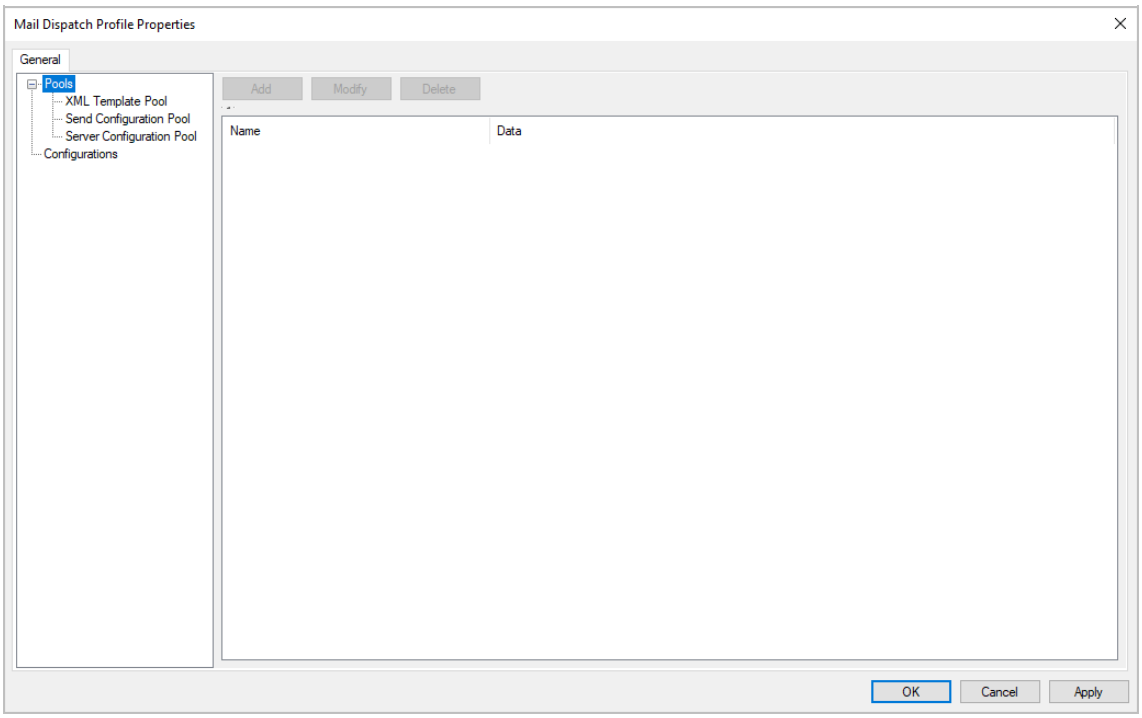


Fig.: Settings dialog of a PROXESS emailing profile

The mask is divided as follows:

General	The “General” tab contains the “XML template pool”, the “sending configuration pool” and the “server configuration pool”. Configuration modules first have to be created in these pools in order to create the respective “configuration” from them.
Add/Edit/Remove	A new configuration module is created using the **Add** button. The configuration module can be edited or adjusted later on with the **Edit** button. If a configuration module is to be permanently deleted, the **Remove** button must be selected.
List (name and data)	The created pools/configurations are listed here.

Basic steps for creating a new configuration:

First, the various different configuration modules (XML file, email recipient and emailing) are created and saved in what are known as pools. Each pool can contain multiple configuration modules. In the second step, these configuration modules are compiled to create a configuration for automatic emailing. There can be multiple configurations here as well.

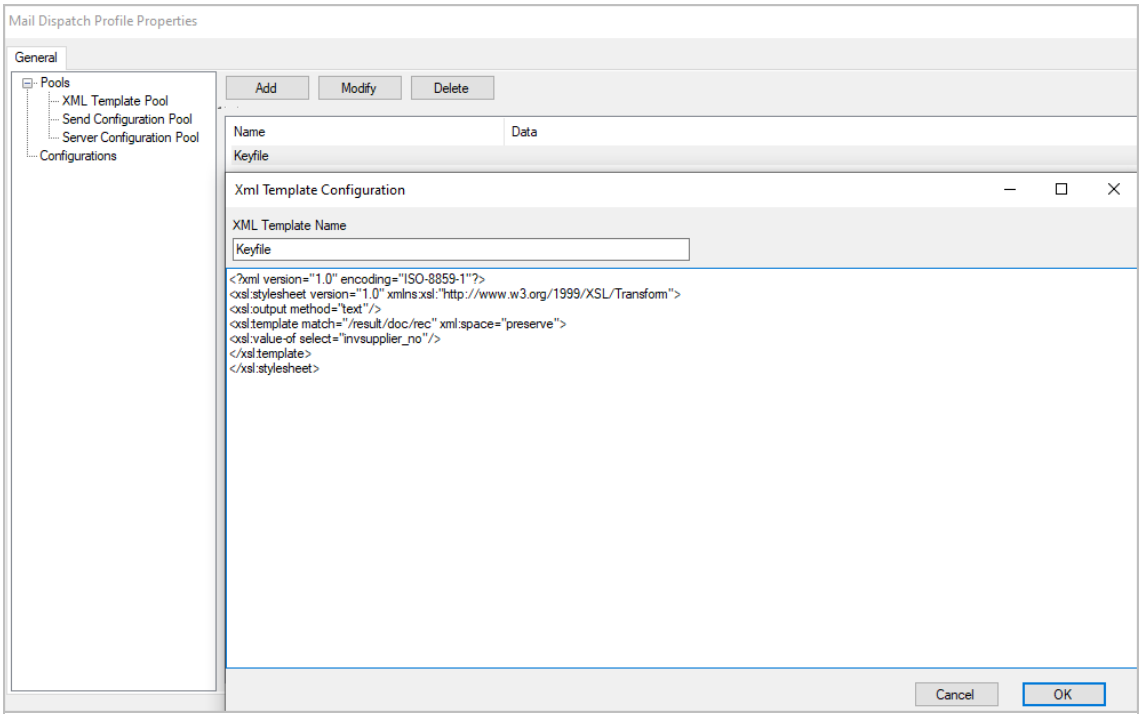


Fig.: Example for the creation of an XML template with the name "Key file"

First step: Create XML template

Mark the "XML template pool" entry and select the **Add** button.

Templates which you can copy and paste and then only have to adapt to suit your individual environment are available for XML pool entries. Contact your PROXESS system administrator for this.

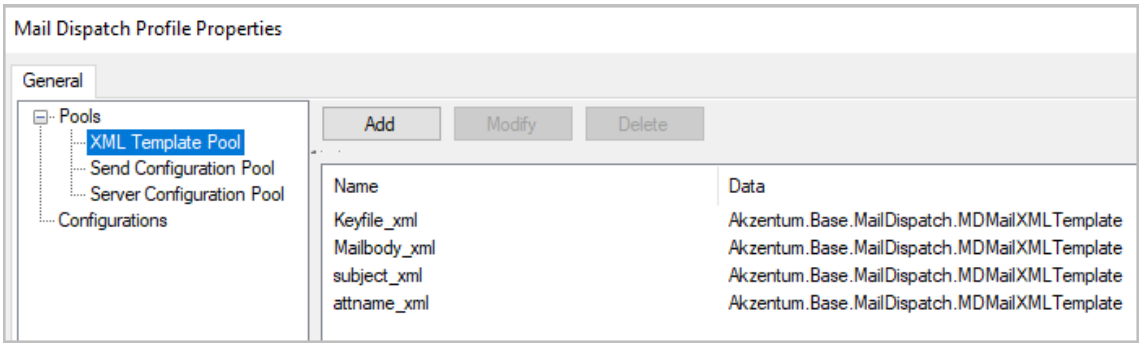


Fig.: Created XML pools

Second step: Create sending configuration

Mark the “Sending configuration” entry and select the **Add** button.

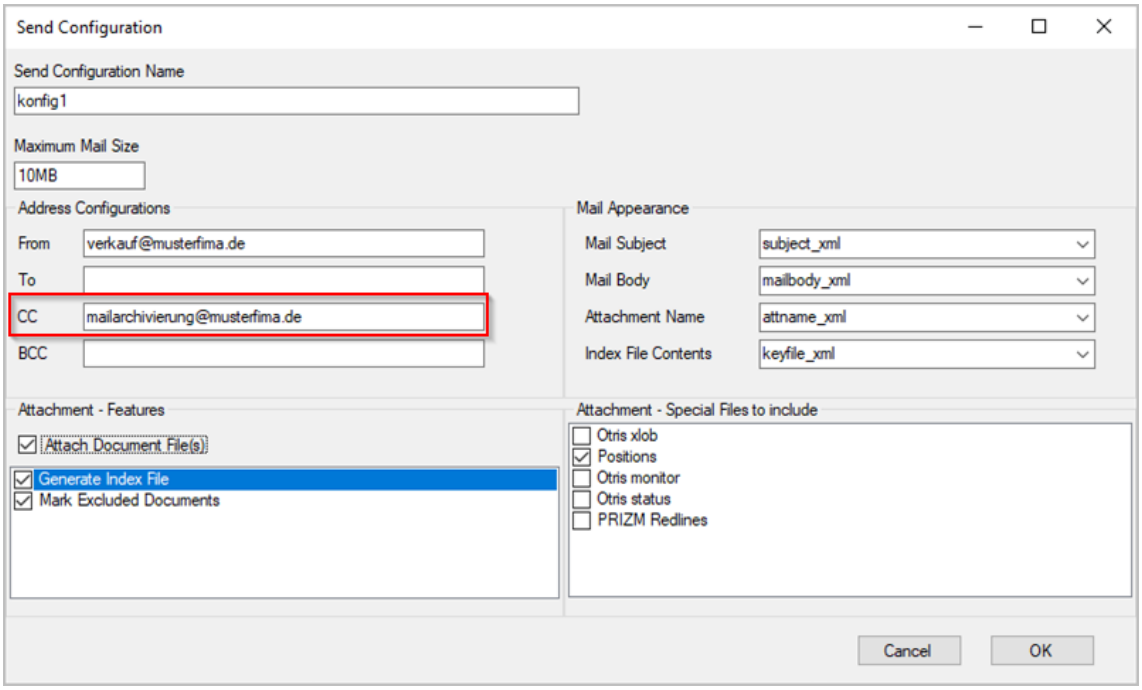


Fig.: Example sending configuration

	If automatically sent emails are to be archived as a copy in the PROXESS archive, an email address defined for automatic PROXESS email archiving has to be entered on the CC line of emails to be sent. Emails sent to this inbox can then be automatically exported and archived.

Third step: Create server configuration

Mark the “Server configuration” entry and select the **Add** button.

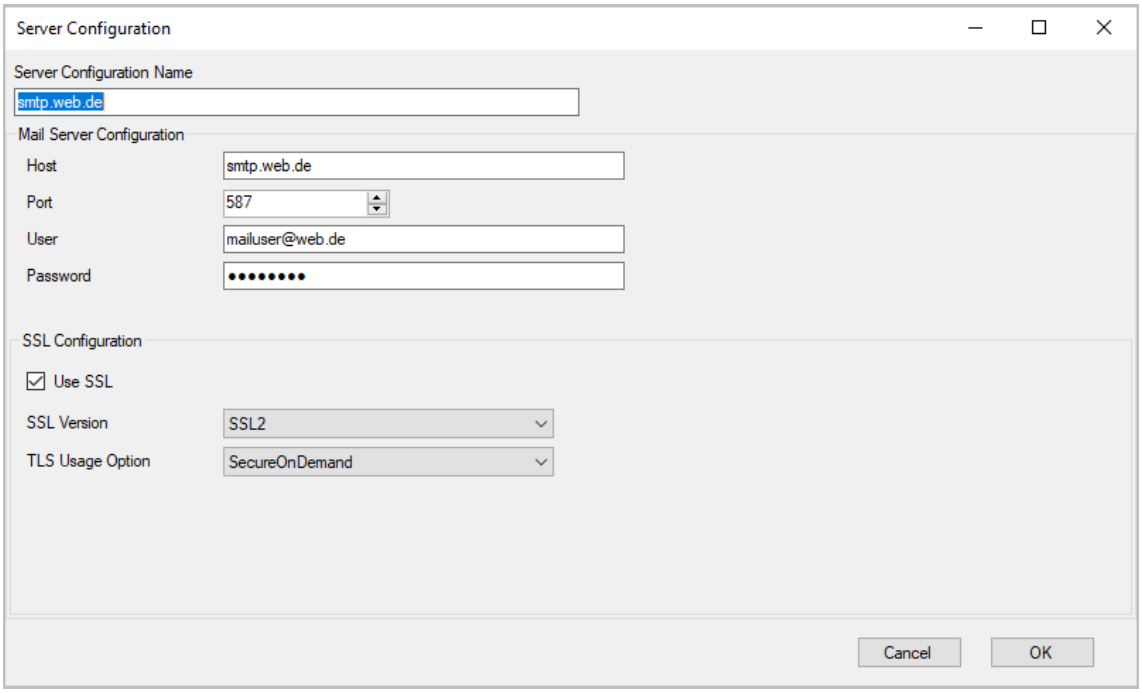


Fig.: Example server configuration

In the server configuration, all settings are entered for the email server from which the emails are sent.

Fourth step: Compile and create emailing configuration

Once the configuration modules have been created in the pools, an overall configuration for emailing can be compiled from them.

Mark the “Configurations” entry and select the **Add** button. The settings dialog opens.

General tab

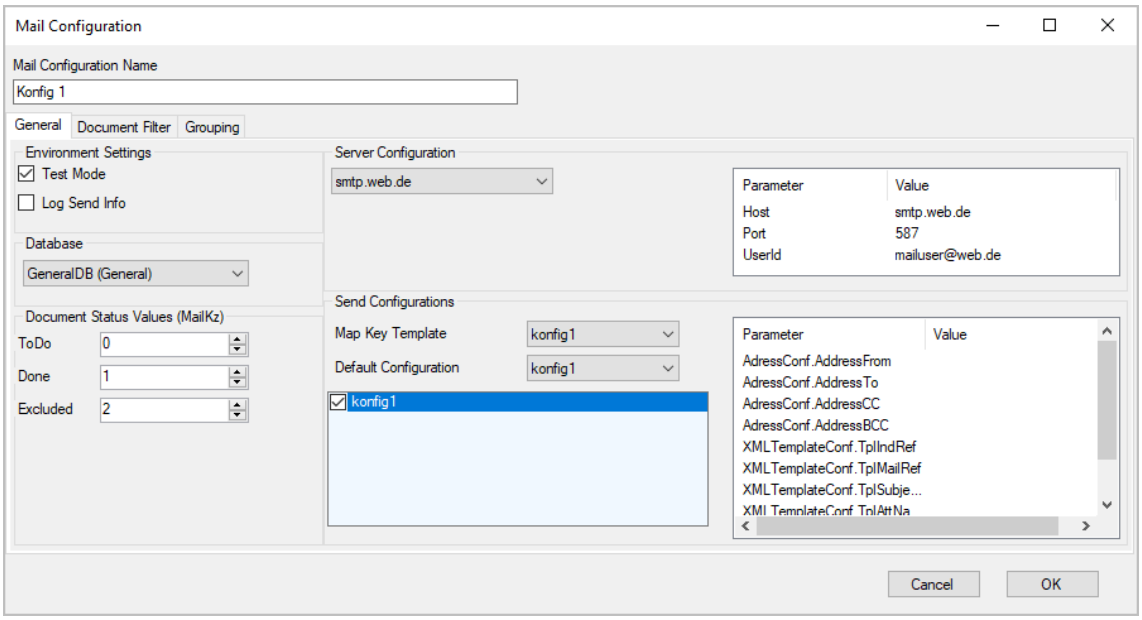


Fig.: Overall configuration for automatic emailing (General tab)

Mail configuration name	Here you assign a name for the configuration of emailing. You will use this name later on when setting up jobs in the PROXESS Job Monitor, for example.
Environment settings	**Log sending confirmation**: If this check box is activated, sending confirmation is logged. **Test mode:** Documents sent in test mode are not marked as sent (EmailID) and are therefore still ready for sending.
Database	Name of the database to be checked for documents to be sent.
Document status values (EmailID)	**To do:** Value to be written in the “EmailID” field if a document is to be selected for sending. **Done:** Value to be written in the “EmailID” field if the document has been successfully sent by email. **Exception:** Value to be written in the “EmailID” field if a document is to be intentionally ignored.
Sending configuration	Select the desired configuration from the defined pool of sending configurations.
Server configuration	Select the desired configuration from the defined pool of server configurations.

Document filters tab

Here you can define filters which further limit the selection of documents to be sent.

To add a filter, click **Edit**.

Fig.: Overview of the document filters for mail configuration "Config 1"

The **Document filter criteria** mask opens. To save a new filter, click **Add**. To edit an existing filter, click **Edit**.

In the following dialog, you can now define the individual filter criteria:

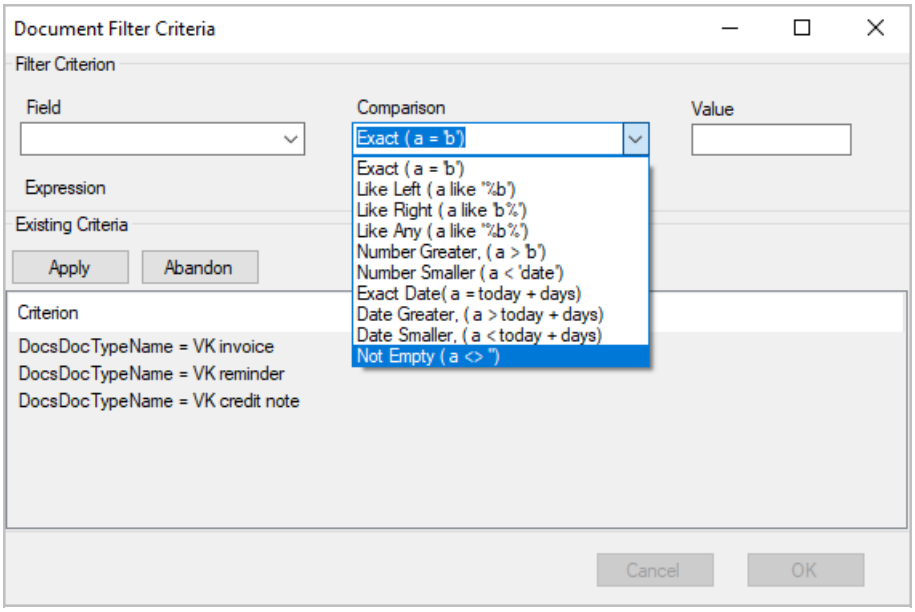


Fig.: Defining document filters

Field	From the list of all fields of this database, select the field on which a filter is to be applied.
Comparison	Select the desired operator for filtering from the list.
Value	Enter a value for the filter condition here.

Apply/Reset	You save the defined filter condition with **Apply** or discard it with **Reset**.
Cancel/OK	You save all set up filter criteria with **OK**. You discard all your inputs with **Cancel**.

The created filters can now be seen and can be adjusted at any time using the **Edit** button or cleared with the **Clear** button.

Grouping tab

Settings for emailing are made on the “Grouping” tab.

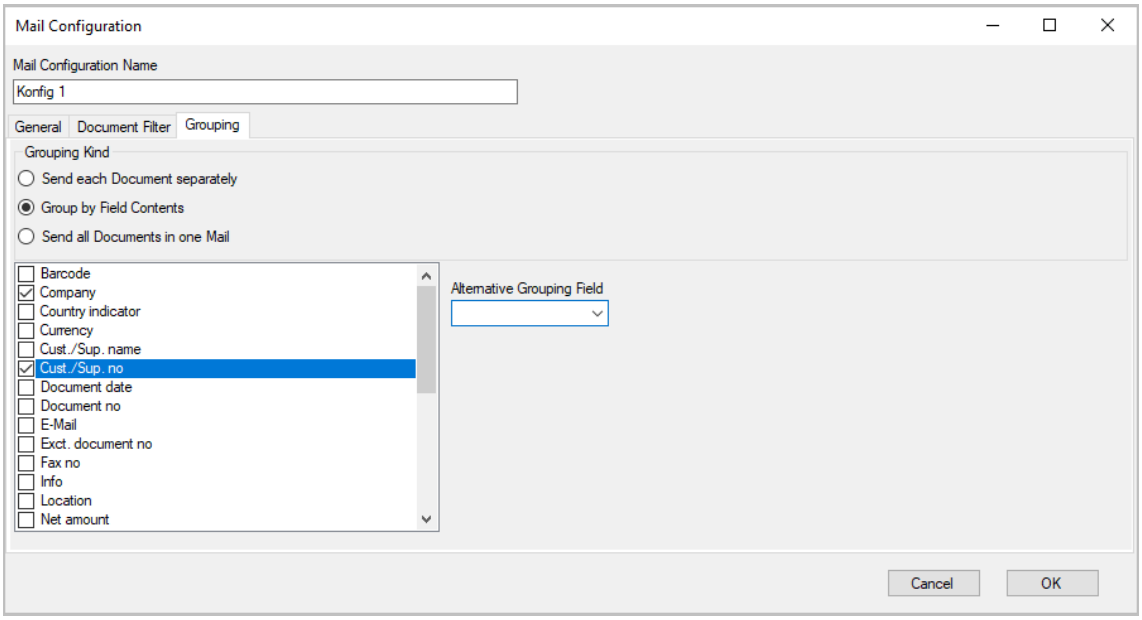


Fig.: Grouping tab for email configuration “Config 1”

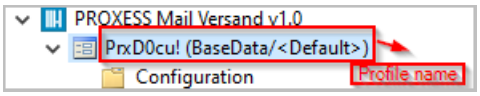
Send each document individually	An email is sent for each document.
Group by field content	In case of identical field content, the documents are sent in one email. Example: If you check the box in front of Customer/Supplier No., all documents (invoices, reminders and credit notes) with an identical customer/supplier number are sent to a customer/supplier in one email with multiple file attachments. If the **Alternative grouping field** is defined, it is taken into account as a replacement for the first grouped field if there is no value there.

Send all documents in one email	All documents of this configuration are sent in one email.

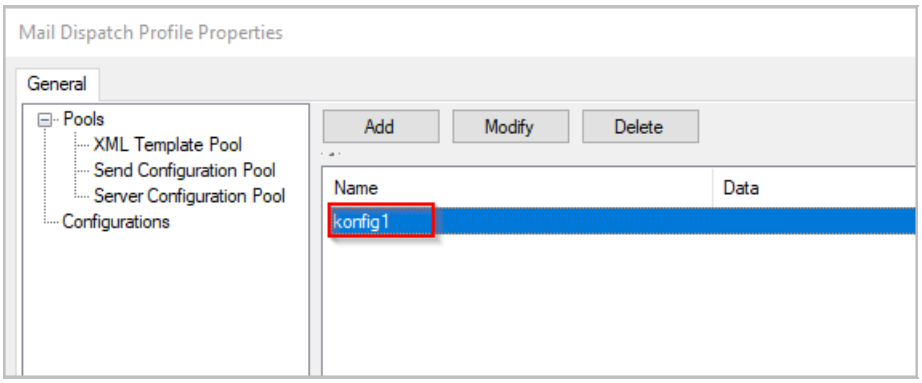
	Before exiting the PROXESS Management Console or before logging out, you have to explicitly save the settings you made. For this purpose, select the **Apply settings** function in the context menu of the module. Alternatively, you can select the **Apply all settings** function in the context menu of the PROXESS server. With this, the settings of your entire session are saved for all modules. **If the settings are not applied, the changes of the current session will be lost.** Only when changes are saved are they then sent to the PROXESS server and available at every workstation.

Creating a job in the PROXESS Job Monitor (emailing)

The parameter for the job in the PROXESS Job Monitor is comprised of
a) the profile name in the PROXESS Management Console



b) and the configuration name from the PROXESS Emailing module.



The call-up of the parameter is comprised as follows:
Parameter: /cfg=ProfileName[ConfigurationName]

In our example, saving of the parameter in the PROXESS Job Monitor looks as follows:

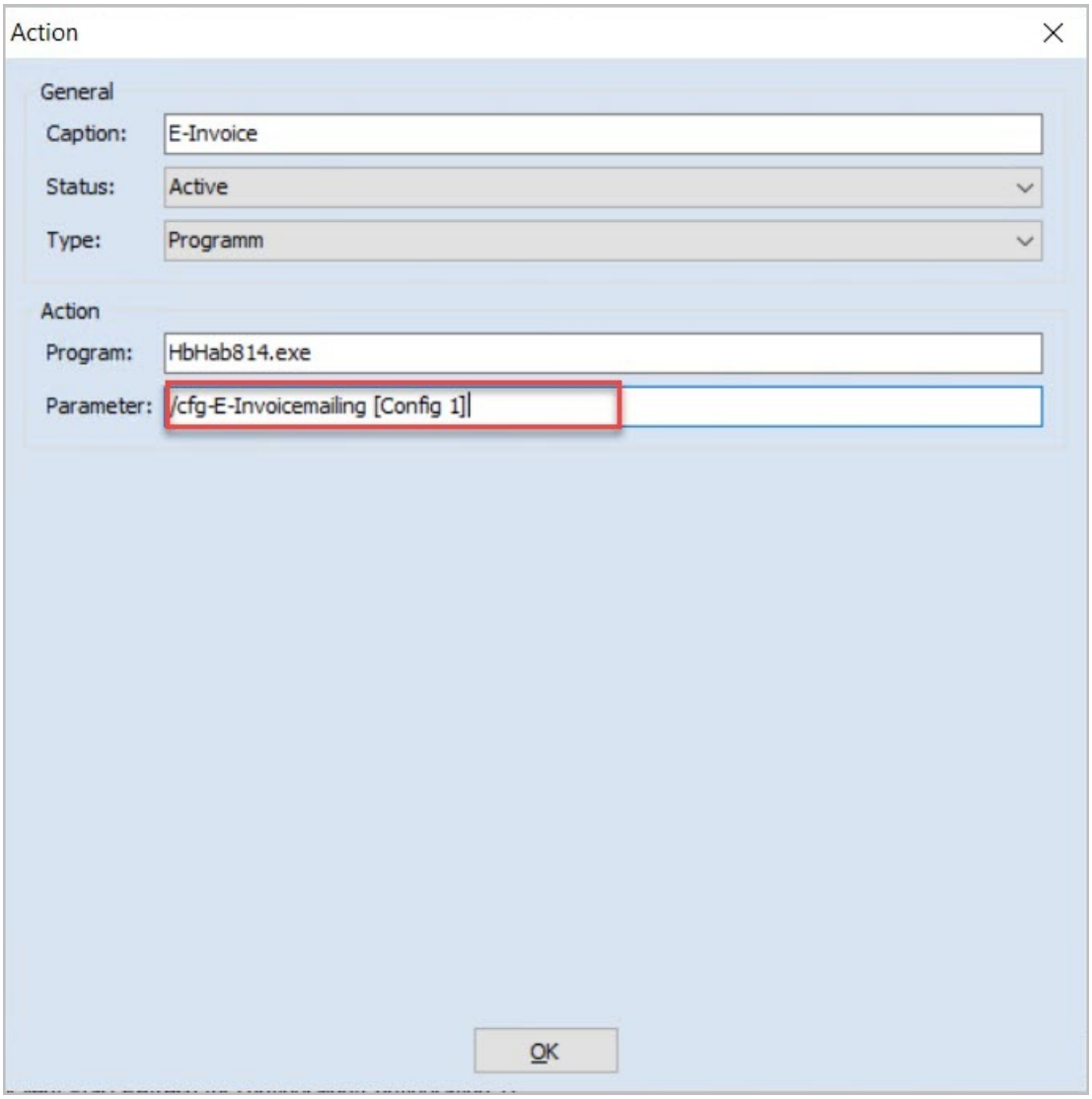


Fig.: Setting up an action for emailing in the PROXESS Job Monitor

PROXESS Outlook Link: Settings for archiving

What is to happen with an email following archiving is configured in the “Archiving” menu branch. Is only the email text to be archived, or the attachments of the email as well? Is the email to be saved in the original .msg format or as a text file?

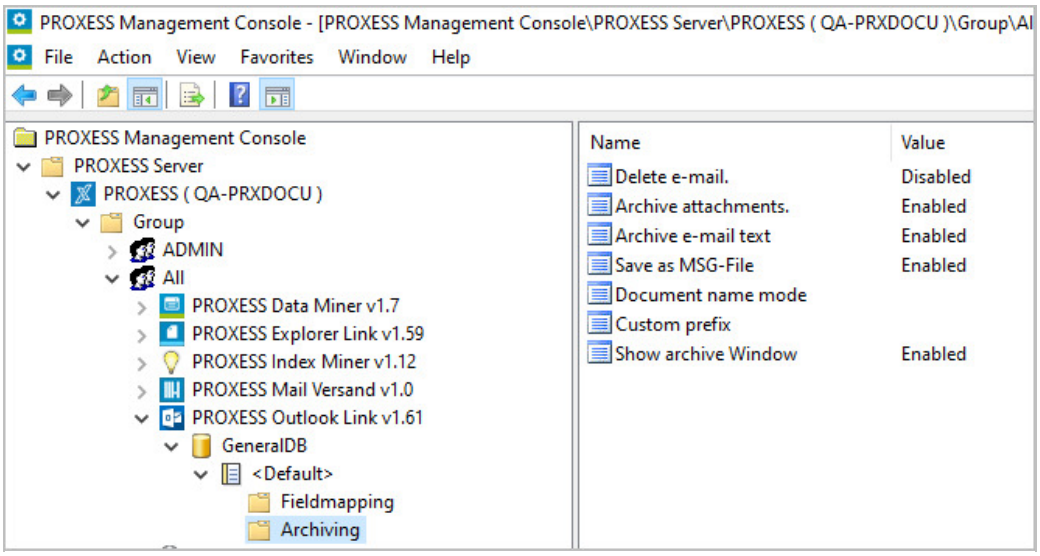


Fig.: Settings for archiving MS Outlook emails

The following settings are possible:

Delete email	If this option is activated, the emails are automatically deleted in MS Outlook following successful archiving in PROXESS.
Archive attachments	Here you can set whether file attachments of an email are also to be archived. If this option is activated, all file attachments are compiled in the same PROXESS document.
Archive email text	If this option is activated, the email text is also archived as a separate file. The file format used for archiving of the email text is determined by the “Text file type” setting in the “Field assignment” section.
Save as Outlook MSG file	If this option is activated, the email is saved in the original (msg) Outlook email format. Note that users can only open this document during retrieval if Microsoft Office Outlook is installed on the workstation.

Create document name by	Three selection options are available here: Date: The date is used as the PROXESS document name here. Subject: The email subject line is used as the PROXESS document name here. User-defined prefix (see explanation below)
User-defined prefix	Specifies a user-defined prefix for the document name. The following constants are available: %DATELONG% %DATESHORT% %SENTDATE% %SENTTIME% %RECEIVEDDATE% %RECEIVEDTIME% %SUBJECT% %SENDER% %TO% %PROXESSUSER% %PROXESSUSERFULL% The PROXESS Outlook Link replaces these constants in the character string with their equivalent values. If you would always like to fill out the document name with the fixed value “Email from” and then the sender, for example, select the following entry: “Email from %SENDER%”.
Display indexing mask	If this option is activated, the indexing mask is displayed interactively prior to archiving. With this, the user can automatically check, supplement and, if necessary, correct filled-in entries.

	Before exiting the program or before logging out, you have to explicitly save the settings you made. For this purpose, you can select the “Apply settings” function in the context menu of the module. Alternatively, you can select the “Apply all settings” function in the context menu of the PROXESS server. With this, the settings of your entire session are saved for all modules. If the settings are not applied, the changes of the current session will be lost. Only when changes are saved are they then sent to the PROXESS server and available at every workstation.

PROXESS Outlook Link: Settings for field assignment

In the “Field assignment” section, you specify where (that is, in which PROXESS fields) the administration information of an email (e.g. the email address of the sender/recipient or the sent date) is automatically entered and saved. In this way, they do not have to be entered manually, but are automatically copied to the PROXESS indexing mask. Prior to final archiving, they can be changed or supplemented there if the setting to display the indexing mask prior to archiving was selected. Conventionally, the standard email fields of “Subject”, “Sender”, “Recipient” and “Sent date” or “Received date” are offered here. You can also specify what happens with the file attachments of an email whose file type is unknown in PROXESS.

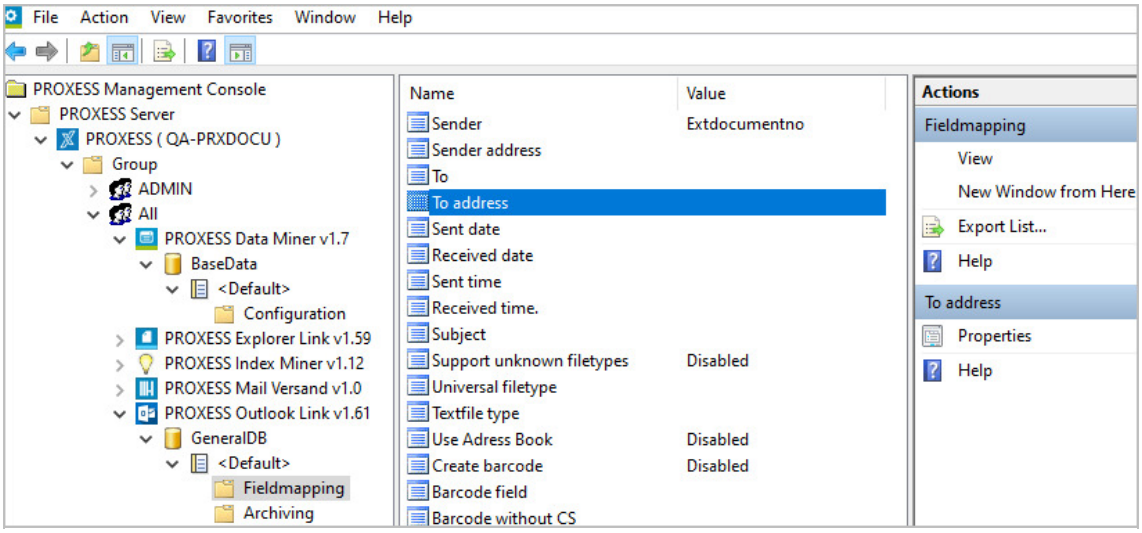


Fig.: Field assignments for the archiving of emails in PROXESS

The following email administration fields can be automatically used in PROXESS:

- Sender (name of the sender)
- Sender address (email address of the sender)
- Recipient (name of the recipient)
- Recipient address (email address of the recipient)
- Sent on (sent date)
- Received on (received date)
- Sent at (time at which the email was sent)
- Received at (time at which the email was received)
- Subject (subject line of the email)

	To make these assignments in the PROXESS Management Console, you have to have created and set up the fields in the PROXESS archive database beforehand. For this reason, check the field configuration of your PROXESS archive database beforehand.

Unknown file types	If this option is activated, file attachments with unknown file types are archived generically (i.e. in a universal file type).
Generic file type (also called “universal file type”)	If the “Unknown file types” option (see above) is activated, you can specify the file type with which these file attachments are to be saved in PROXESS here. This file type has to be created in the PROXESS Administrator and activated as the “universal file type” beforehand. The designation “universal” with the file extension “uni” is generally offered here. “Local registry” should be selected as the option in the application properties of this universal file type. With this, the local workstation of the user is always searched for a suitable application in case of an unknown file type. This allows you to respond in a versatile way to file types which are not recognized in PROXESS.
Text file type	Here you select the file type for archiving the email text (e.g. editor for WordPad or Word). Use a simple and easily available file type here if possible so that PROXESS users can open the text when retrieving and displaying emails.
Use address book	This function must be activated in order for the email address for the “sender address” and “recipient address” to be resolved. In the case of large address books, delays may occur when resolving the email address.
Create bar code	If this option is activated, an automatic bar code number is created with each archived document and entered in the indexing mask. In addition, the created bar code number is located in the Windows clipboard.  Activate this function so that users can add individual emails to processes in an integrated ERP system.
Bar code field	Assignment of the document type field in which the created bar code number is entered. This field must be of data type VARCHAR. The field is only filled in if bar code generation has been activated above.

Bar code type	Here you specify the bar code type to be used in this PROXESS module. “PROXESS” type: 8- or 10-digit bar code number with or without 2-digit check number (depends on the “Add bar code check number” function). Only “Lower bar code range” needs to be configured for the bar codes. “Standard (7+1)” type: 7-digit bar code with or without 1-digit check number (depends on the “Add bar code check number” function). “Upper bar code range” and “Lower bar code range” need to be configured for the bar codes. Type: “Standard (13+1)”: 13-digit bar code with or without 1-digit check number (depends on the “Add bar code check number” function). “Upper bar code range” and “Lower bar code range” need to be configured for the bar codes.
Bar code prefix	This field defines the first two digits of the bar code. The default setting is “00”. Using this “number range setting”, overlapping with other bar code number ranges, e.g. via bar code label printing or through the generation of logical bar codes from document numbers, can be avoided.
Bar code range	Specifies the length of the created bar code number (without check number) and the lower limit from which the bar code numbers are created.
Add check number to bar code	Adds a 2-digit check number at the end of the bar code.

	Before exiting the program or before logging out, you have to explicitly save the settings you made. For this purpose, you can select the “Apply settings” function in the context menu of the module. Alternatively, you can select the “Apply all settings” function in the context menu of the PROXESS server. With this, the settings of your entire session are saved for all modules. If the settings are not applied, the changes of the current session will be lost. Only when changes are saved are they then sent to the PROXESS server and available at every workstation.

About PROXESS Outlook Link

The PROXESS Outlook Link is used for the quick and easy archiving of emails and their attachments from MS Outlook.

The following requirements must be met before the initial archiving with the PROXESS Outlook Link:

- The module has to be added for the user/group in the PROXESS Management Console.
- Settings for archiving and indexing the emails must have been made.
- The user/group has to have corresponding access rights.

How do I archive with the PROXESS Outlook Link?

Emails from any desired Outlook folder (e.g. the inbox) are archived at any desired point in time in PROXESS:

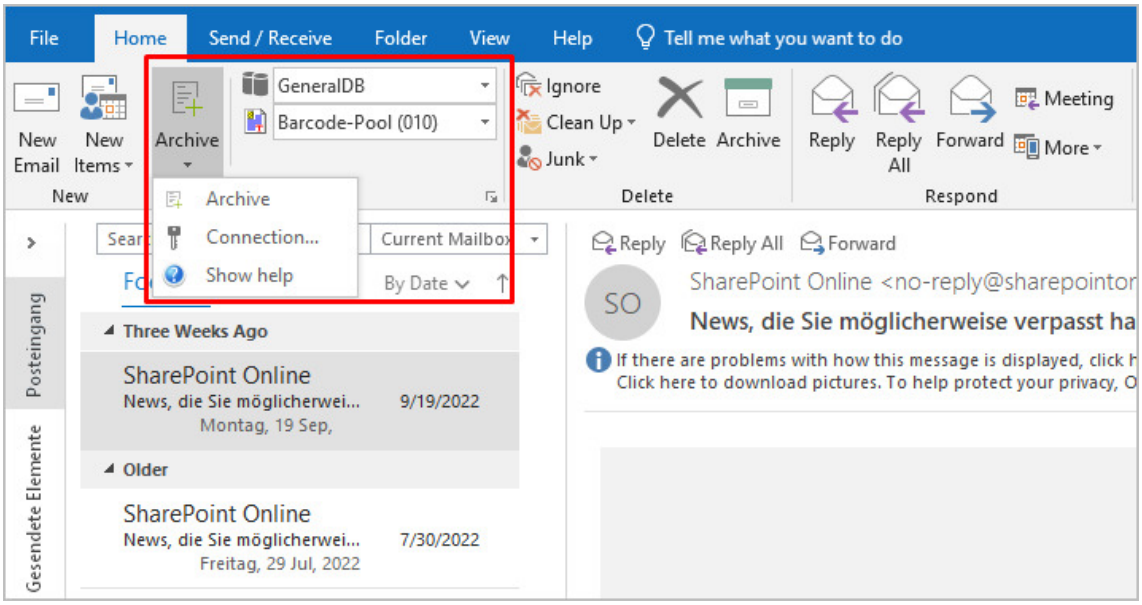


Fig.: Archiving an email from the "Inbox" folder

Emails can be archived when sent:

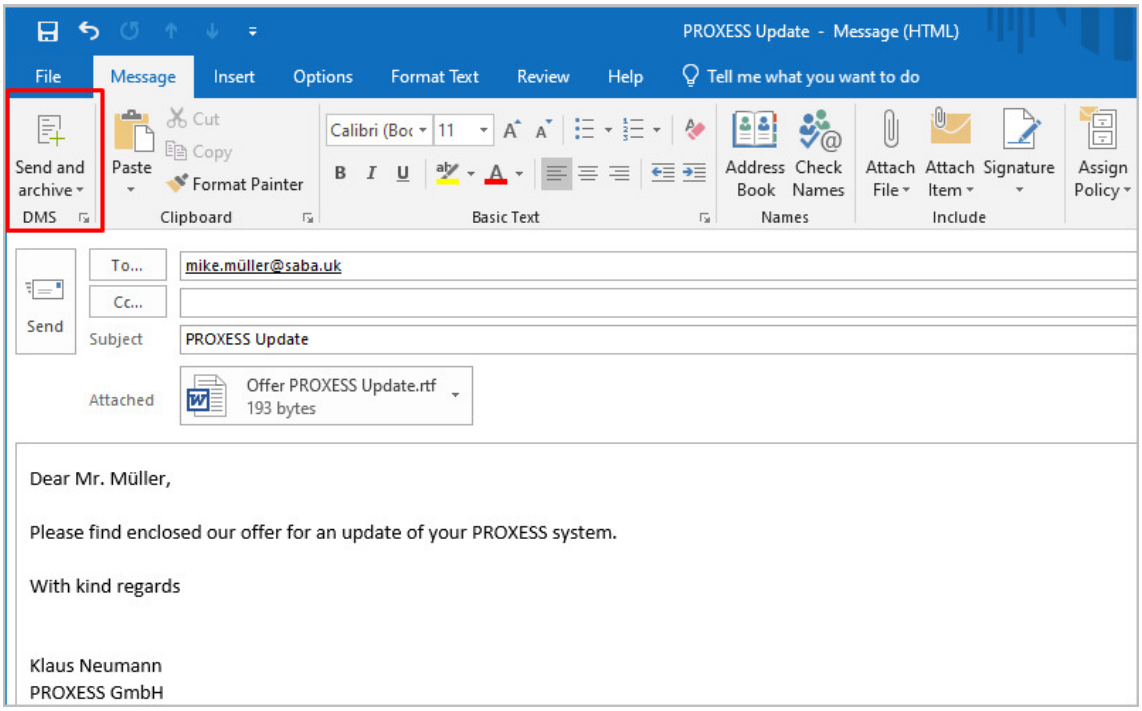


Fig.: Emailing and "archiving in PROXESS" in a single step

The form which the archiving procedure takes and the indexing fields which are filled in there depend on the settings of the PROXESS Management Console.

See also:

Adding a module (basic configuration)

Archiving (PROXESS Outlook Link settings)

Field assignment (PROXESS Outlook Link settings)

Settings (PDF Renderer settings)

The settings made here are relevant for the display of COLD files (Diaclips) in the PROXESS Web Client. Display always occurs in the form of a PDF file.

Various parameters are available for determining a background image and adjusting the text.

	Familiarize yourself with the settings already made for the PROXESS Standard Client. These can be found in the properties of the file type on the “File type applications” tab. Information on the settings can also be found in the documentation of the PROXESS Administrator Console under the help topic “Linking file type to application” and “Parameters for Diaclip files”.

General background	URL path to a background image, e.g. a company’s stationary This background image applies for all pages of the displayed file. A different background image can be defined for the first and last pages.  Select a background image in all cases, as problems in displaying text may arise otherwise. PROXESS provides white background TIF files in DIN A3 and A4 for this purpose. (example path: C:\Program Files\PROXESS\PROXESS Standard Client\a4-h.tif).
First page background	URL path to an optional background image on the first page of the file
Last page background	URL path to an optional background image on the last page of the file
Offset X	Horizontal spacing from left edge of image in Twips
Offset Y	Vertical spacing from top edge of image in Twips
Font size	Specification of the font size for the text of the COLD file to be displayed in Twips (1 Twip = 0.017638 mm)

Font height	Specification of the font height for the text of the COLD file to be displayed in Twips (1 Twip = 0.017638 mm)
Line height	Specification of the line height for the text of the COLD file to be displayed in Twips (1 Twip = 0.017638 mm)
Number of lines	Page break setting: 0 = Only Form Feed: The page break is only created using the “Form Feed” specification in the data record. 1 = Inserts a page break no later than after the number of lines specified in “Maximum number of lines”. Should there be a Form Feed in the data record before this, it is relevant. This means that a page break is already inserted then. 2 = Automatically calculates the maximum number of lines by dividing the paper length by the specified line height (PaperLength/LineHeight). Should there be a Form Feed in the data record before this, it is relevant. This means that a page break is already inserted then.
Maximum number of lines	This setting is only evaluated if the value “1” was selected in the “Number of lines” setting. Maximum number of lines after which a page break is forced in the PDF display.

Selectors (PDF Renderer settings)

The settings made here affect the display of COLD files in the PROXESS Web Client.

File type	Here you select the COLD file types for which these settings are to apply. The file types are managed in the PROXESS Administrator Console. All file types with the extension .cld are listed as COLD file types. Either a specific file type or all CLD file types can be selected.
Base date	The base date is the reference date for the date comparison with the two following settings for the start and end dates. You can choose from among all the date fields of the database here.
Start date/End date	Select a start date and an end date up until which the current profile is valid. You can delete an existing date with the “Del” key. Example: You save company stationary for the presentation of outgoing invoices or delivery notes. On a certain date, the bank account information or company address will change. You can control the saved company stationary using the validity of the profile in this way, even though the file type has not changed.

About PDF Renderer

The settings in the PDF Renderer manage the conversion and file display of COLD files (Diaclips) as a PDF file. The settings made here affect the display in the PROXESS Web Client.

General settings for the search path

Open the search path and then the **General settings** entry.

You can change the default settings with a double-click.

Displayed years	In the list of values of a date field, either the last X years (“10” for the last 10 years) or a range (“1990-2014”) can be entered. If only one year number is specified, the current year is used as the second limit of the time period. When defining the start and end year, this must be between 1900 and 2100. When defining the last X years, you can only go back up to 200 years. Examples of possible entries: “15” for the last 15 years, i.e. from 2000 to 2015 “2000-2020” for the period from 2000 to 2020 “1995” for the period from 1995 to the current year “2030” for the period from the current year to 2030
Document limitation	Limits the number of displayed documents in a path search folder. This prevents the number of displayed documents from being too large and therefore the query or display from being too slow.
Folder limitation	Limits the number of displayed folders for free text or number fields. This prevents the number of displayed folders from being too large and therefore the query or display from being too slow.
Document type mode	This determines which document types are to be displayed in the search path: – All – Only those which also contain documents in the search – Defined selection of document types

Specifying a search path

Step by step:

Connect to the PROXESS server in the PROXESS Management Console. (See: Logging in and adding servers)

Select the desired group or the desired individual user for whom the search path is to apply and add the **new "PROXESS Path Search"** module (see Adding a module).
If the search path is to apply for everyone, the best thing to do is to select the "Everyone" group if it has been created in your case.

	Individual search paths cannot be assigned to the "Admin" user. The administrator receives a list of all created search paths as a selection list.

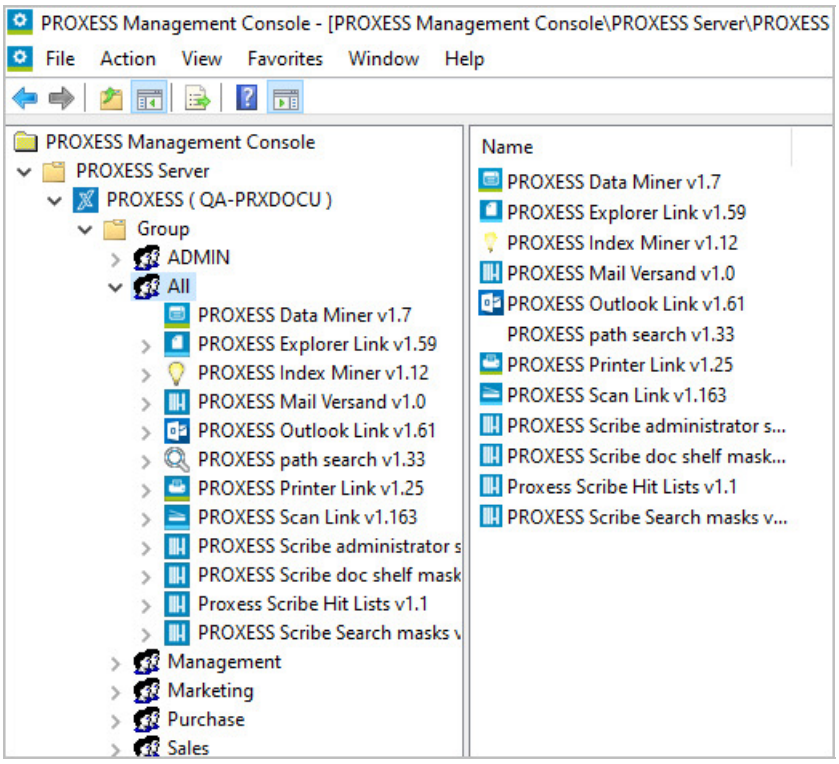


Fig.: Overview of the module configuration for the "Everyone" group

Now you can create a **new named profile** using the context menu of the added "PROXESS Path Search" module.

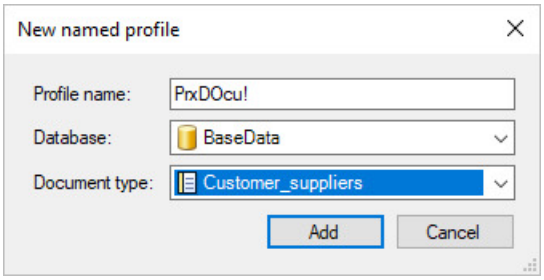


Fig.: Creating a new profile for the PROXESS search path

The user can select this profile later on in the PROXESS Web Client or PROXESS Drive:

Profile name	Name of the new search path which appears in the selection list in the PROXESS Web Client and can be selected by the user.
Database	Selection of the database for which the search path is to apply.
Document type	The search path can be set up differently for individual document types. In this case, a separate profile must be created for each document type. If the path is to apply for all document types, select “Default”.

Select the **Add** command.

Specify fields for the search path:

Once you have created a new profile, you can select the fields for the search path. Open the profile which was just created and double-click the **Structure of the path search** entry.

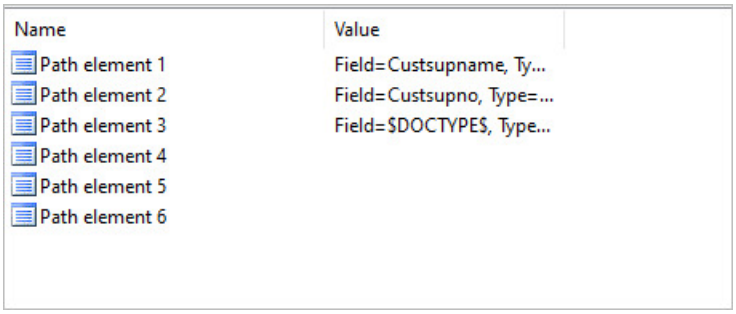


Fig.: Created search path with a total of five hierarchy levels

By double-clicking individual path elements, you can search for document fields to be displayed to the user at the respective location.
If a register or thesaurus is assigned to this field in the PROXESS Administrator Console, this is also indicated in the “Register” entry.

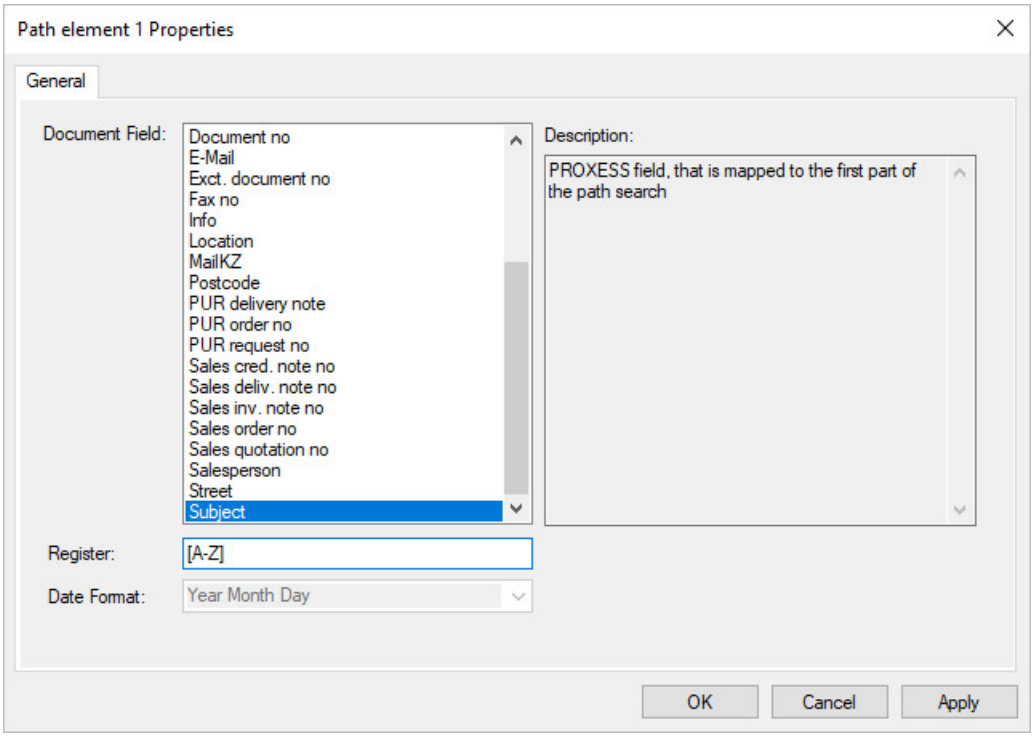


Fig.: Selection of a PROXESS field to be added to the search path.

	Save your settings, e.g. in the context menu of the server node or using the **Apply all settings** command.

About PROXESS Path Search

The PROXESS Path Search enables access to PROXESS documents using a directory structure similar to Windows Explorer.
Use cases for the PROXESS Path Search include the PROXESS Drive and path searching in the PROXESS Web Client.

You specify the fields and their hierarchy for the directory path with the configuration here.

PROXESS Printer Link: Settings for file creation

More detailed settings for document creation can be made here. In addition to the “yes” or “no” for some options, some “hows” also have to be cleared up. Here you can save the background images to be used and select the output printer for physical printing, for example.

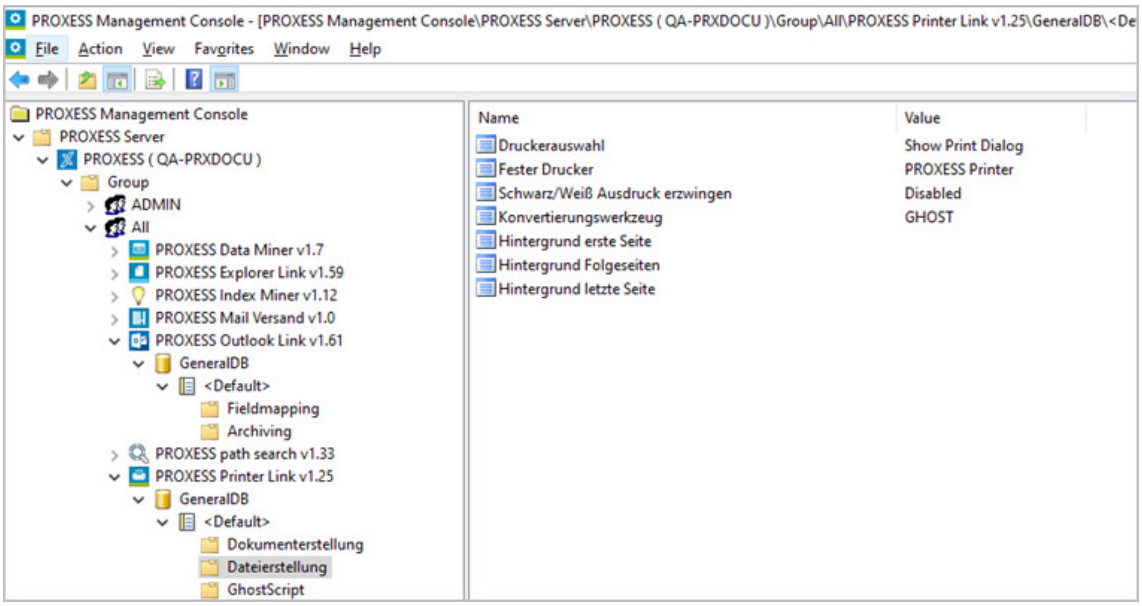


Fig.: Printer Link settings for file creation in the overview

Settings for printer selection

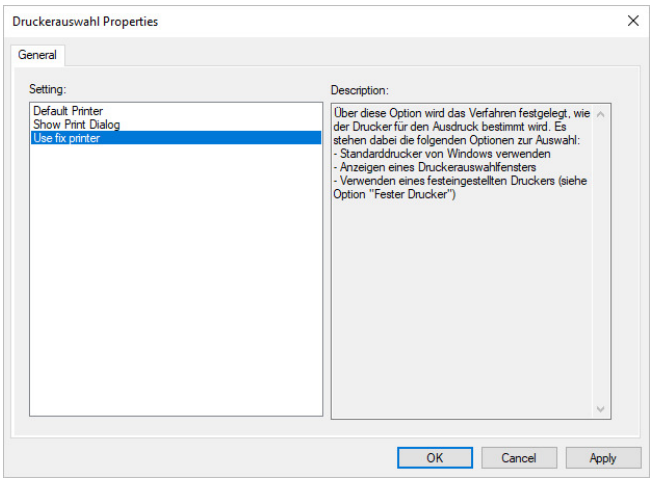


Fig.: Possible settings for printer selection in the PROXESS Printer Link

Printer selection:

Default printer	With this selection, the output file is printed out on the printer activated as the Windows default printer. The “File creation” setting in the document creation section must be activated for this.

Display printer selection dialog	If this option is activated, the printer selection dialog is displayed each time printing occurs. Select this option if the user or users to whom you assign this profile are to individually decide the printer with which actual printing is to occur.
Specific printer	If this option is activated, a specific set printer is always selected. This does not have to be the exact same one as the Windows default printer of the user. Select this option if you would like to channel actual printing and the users of the profile do not have the same default Windows printer.

Advanced properties:

Specific printer	If the “Select a specific printer” option above has been selected, you can enter the name of the “specific printer” using a selection field here.
Force black-and-white printing	Specifies whether the file for physical printing is to create a black-and-white printout or a color one.
Conversion tool	The conversion tool to be used for converting the print data stream to the output format is specified here. The open-source “GhostScript” solution is currently supported (see the “GhostScript settings” chapter for this).
First page background	The path of the background image for the first page of a multi-page output file (PDF and physical print file) is specified here. If the output file has one page, the background file specified here is used. Background images must be in the TIF format.
Background of subsequent pages	The path of the background image for subsequent pages of a multi-page output file is specified here.
Last page background	The path of the background image for the last page of a multi-page output file is specified here.

	Use network sharing for the background images to ensure that all users can access the files if necessary.

	Before exiting the program or before logging out, you have to explicitly save the settings you made. For this purpose, you can select the “Apply settings” function in the context menu of the module. Alternatively, you can select the “Apply all settings” function in the context menu of the PROXESS server. With this, the settings of your entire session are saved for all modules. **If the settings are not applied, the changes of the current session will be lost.** Only when changes are saved are they then sent to the PROXESS server and available at every workstation.

PROXESS Printer Link: Settings for document creation

The settings for document creation revolve around the way documents are created and their archiving in PROXESS. Whether a document is only “printed to the archive”, actually output by a printer simultaneously as well or whether background images (company logo or stationary) are also to be saved is determined here, for example.

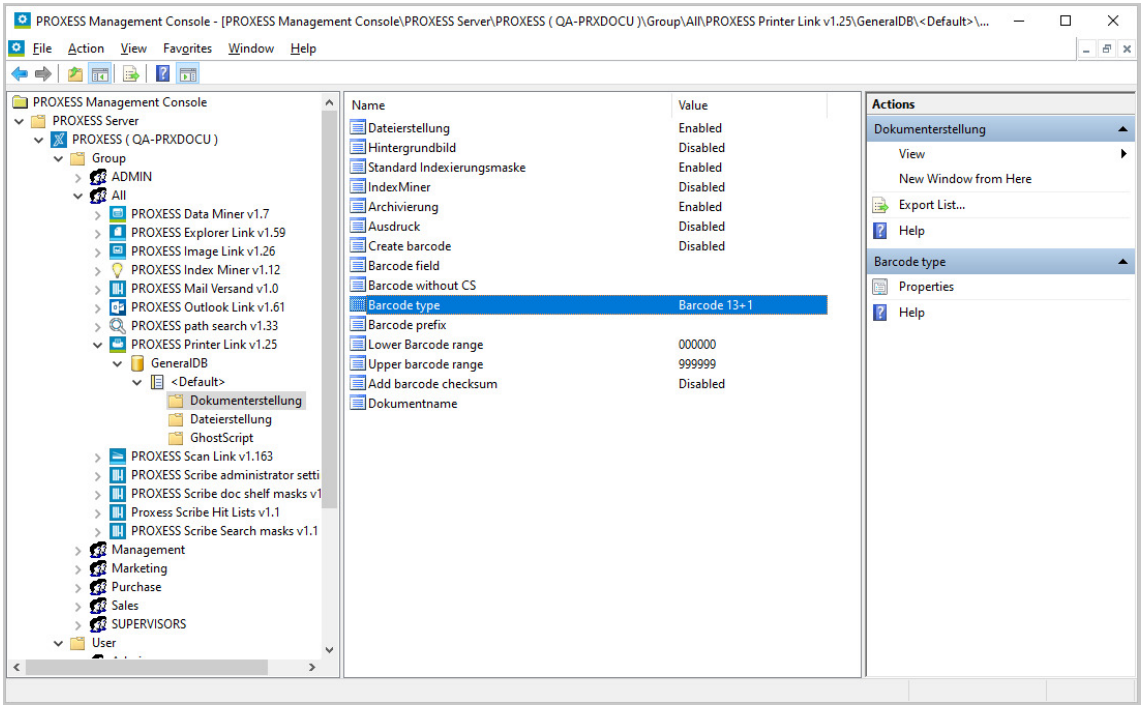


Fig.: Overview of the setting options of the PROXESS Printer Link for document creation

The setting options in detail:

File creation	Settings which have been made for creation of a print file (e.g. printer selection) are activated here. See the “Settings for file creation” chapter for this. This option is generally activated. In a few use cases in which only the print stream of a file is further processed, for example, this option is deactivated.
Background image	If this option is activated, freely definable background images are saved for the PDF output file. These background images are specified in more detail in the “Settings for file creation” chapter.

Default indexing mask	If this option is activated, the default indexing mask is used for indexing the document in PROXESS. This is the defined default mask for the selected default database of the logged-in user.
User-defined indexing mask	If this option is activated, the user-defined indexing mask is always used for indexing the document in PROXESS. The last indexing mask selected by the user is the user-defined indexing mask. (This option is not yet active).
IndexMiner	If this option is set, the PROXESS Index Miner function is activated. With this, the user is supported when entering index values in such a way that index terms of similar PROXESS documents can be copied. (See: About PROXESS Index Miner)
Archiving	If this option is activated, the files created are archived in PROXESS. If the option is deactivated, the files are only printed on the selected printer and not archived.
Printout	If this option is activated, the files created are actually output on a printer. If deactivated, the files are only archived as an electronic document in PROXESS if the “Archiving” option is activated.
Create bar code	If this option is activated, an automatic bar code number is created with each archived document and entered in the indexing mask. In addition, the created bar code number is located in the Windows clipboard.  Activate this function so that users can add individual emails to processes in an integrated ERP system.
Bar code field	Assignment of the document type field in which the created bar code number is entered. This field must be of data type VARCHAR. Specifies the PROXESS field to which the bar code is to be assigned.

Bar code type	Here you specify the bar code type to be used in this PROXESS module. “PROXESS” type: 8- or 10-digit bar code number with or without 2-digit check number (depends on the “Add bar code check number” function). Only “Lower bar code range” needs to be configured for the bar codes. “Standard (7+1)” type: 7-digit bar code with or without 1-digit check number (depends on the “Add bar code check number” function). “Upper bar code range” and “Lower bar code range” need to be configured for the bar codes. Type: “Standard (13+1)”: 13-digit bar code with or without 1-digit check number (depends on the “Add bar code check number” function). “Upper bar code range” and “Lower bar code range” need to be configured for the bar codes.
Bar code range	Specifies the length of the created bar code number (without check number) and the lower limit from which the bar code numbers are created.
Add check number to bar code	Adds a 2-digit check number at the end of the bar code.

	Before exiting the program or before logging out, you have to explicitly save the settings you made. For this purpose, you can select the “Apply settings” function in the context menu of the module. Alternatively, you can select the “Apply all settings” function in the context menu of the PROXESS server. With this, the settings of your entire session are saved for all modules. **If the settings are not applied, the changes of the current session will be lost.** Only when changes are saved are they then sent to the PROXESS server and available at every workstation.

PROXESS Printer Link: GhostScript settings

In this dialog, you can extensively affect PDF generation. Generally, no adjustments are required here.

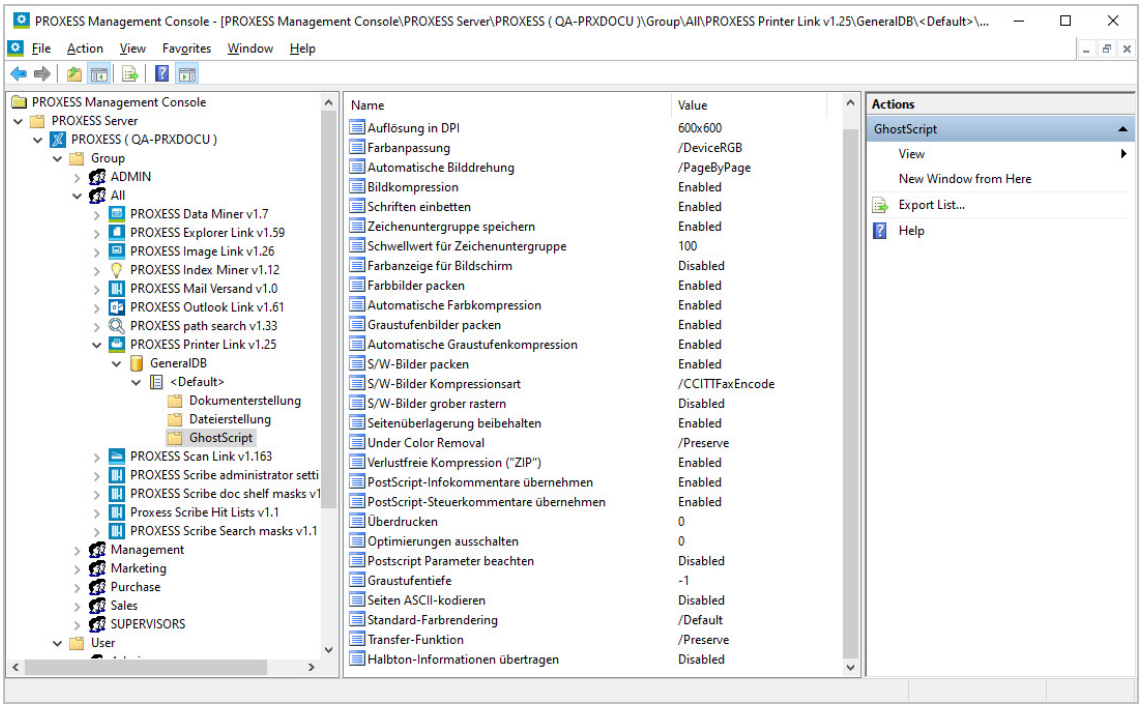


Fig.: Overview of the GhostScript settings of the PROXESS Printer Link

The following settings are possible:

PDF version	Here you set the PDF format specification on which the file to be created is to be based. If Acrobat Reader version 4.x is used at your organization, version PDF-1.3 is to be set. For archiving compliant with the PDF/A standard, on the other hand, version PDF-1.4 is to be used.
Resolution in DPI	This option determines the resolution of the archive file created. A high resolution increases the clarity of embedded graphics, but requires more storage space.
Automatic image rotation	This option makes it possible to rotate the pages of a document in such a way that the majority of the text is readable. Bear in mind that this can modify the original file and cause problems if the archive file is to be further edited.

Image compression	With this option, you can create a compressed archive file. The compression of text and vector graphics on the pages of a document reduces the size of the resulting PDF file. If a “loss-free” compression procedure is used for this process, where no information contained in the source file is lost (see “UseFlateCompression” variable), the variable can be set to “yes”.
Embed fonts	Save the required font types in the document. In accordance with the separately published PDF recommendations, a file has to contain the graphical descriptions of all the font types used within it so that they can also be displayed true to the original if not all of the required font types are installed on the displaying computer. This “font embedding” is ensured by this parameter.
Save character sub-group	If this option is active, only the characters of a font used are saved in the document. If not all of the characters of a font type are used in the archive file, which is usually the case, a sub-group of this font type is to be embedded in this file containing only the graphical descriptions of the characters actually used. With Unicode fonts in particular, this option can lead to a considerable reduction in the file size.
Threshold value for character sub-groups	The variable is evaluated if “Save character sub-group” is active. A sub-group is only to be formed from a font used if the percentage of the characters of it actually used in the file is less than the one specified here. The value “100” means that, if possible, a sub-group is always to be formed if less than 100 percent of the characters contained in the font type are used.
Color display for screen	Images are converted from the CMYK color model (printer) to RGB (screen). CMYK (Cyan – Magenta – Yellow – Key color = Black) is a model for describing colors which reproduces them via subtractive mixing of the four base colors named above. It is primarily used in professional printing. With RGB (Red – Green – Blue), on the other hand, each color is described via the additive color mixing of proportions of red, green and blue. Monitors work with RGB colors.
Pack color images	Images are converted from the CMYK color model (printer) to RGB (screen). CMYK (Cyan – Magenta – Yellow – Key color = Black) is a model for describing colors which reproduces them via subtractive mixing of the four base colors named above. It is primarily used in professional printing. With RGB (Red – Green – Blue), on the other hand, each color is described via the additive color mixing of proportions of red, green and blue. Monitors work with RGB colors.

Automatic color compression	If “Pack color images” is active, the compression type is automatically selected based on the image type.
Pack gray-scale images	Gray-scale images are saved packed in the archive file.
Automatic gray-scale compression	If “Pack gray-scale images” is active, the compression type is automatically selected based on the image type.
Pack B&W images	Black-and-white images are saved packed in the output file.
B&W image compression type	For the compression of monochrome images (“black-and-white”), the internationally common CCITT format originally developed to transfer fax messages is used, as it works without loss and delivers the best results on average.
Reduce B&W image resolution	If the archive file contains a large B&W image, a lower resolution can be selected with this option so that less storage space is used.
Retain paging	If this option is set, the paging information is transferred to the archive file created.
Under color removal	This option passes on the “Under color removal and black generation” setting to the archive file.
Loss-free compression (“ZIP”)	If “image compression” is activated, this option determines which method is to be used when compressing the pages. “FlateCompression”, which is also known as “ZIP”, is a loss-free compression method whose operating principle is public and freely accessible so it can also be used for long-term archiving.

Apply PostScript info comments	If this option is active, GhostScript tries to transfer document information from PostScript comments to the document properties of the PDF document. The following comments are affected by this: Author from PS: %%For: Creator from PS: %%Creator: Title from PS: %%Title: Producer from PS: product name (“Acrobat Distiller 7.0”) CreationDate from PS: Distiller time stamp (new creation time of the archive file) ModDate from PS: Distiller time stamp (modification time of the archive file)
Apply PostScript control comments	If this option is active, comments for controlling print stream conversion are applied.
Overprinting	This option controls “overprinting mode”. Select “Full” for complete overprinting and “Only printed” if only the parts already printed are to be overprinted.
Deactivate optimizations	This option forces GhostScript to not utilize certain optimizations of the creation process.
Use PostScript parameters	If this option is active, the instructions also included in the PostScript print stream are suppressed.
Gray-scale depth	This option specifies the number of gray-scale levels used when rastering gray-scale images. The values 1, 2, 4, 8 and the value “original” (–1) are permissible.
ASCII-code pages	Whether the data is to be written to the PDF file in binary format or ASCII text format is specified here. As saving of the same data in a binary file requires less storage space than in a text file for technical reasons, the first format is preferred.
Standard color rendering	This option describes how color rendering is to occur. Acceptable values include “Default”, “Perceptual”, “Saturation”, “RelativeColorimetric” and “AbsoluteColorimetric”.
Transfer function	If this option is active, defined transfer functions are used in the archive file created.

Transfer halftone information	If this option is set, halftone information is transferred to the archive file to be created.

	Before exiting the program or before logging out, you have to explicitly save the settings you made. For this purpose, you can select the “Apply settings” function in the context menu of the module. Alternatively, you can select the “Apply all settings” function in the context menu of the PROXESS server. With this, the settings of your entire session are saved for all modules. If the settings are not applied, the changes of the current session will be lost. Only when changes are saved are they then sent to the PROXESS server and available at every workstation.

About PROXESS Printer Link

Using the PROXESS Printer Link, you can convert documents to PDF format, archive them and simultaneously print them out on an actual printer in a single step from any program with a Windows print dialog.

Before you “print a file to the archive” with the PROXESS Printer Link for the first time as a user, the administrator should make certain settings in the PROXESS Management Console.

To configure the PROXESS Printer Link, there are

- settings for file creation
- settings for document creation
- GhostScript settings

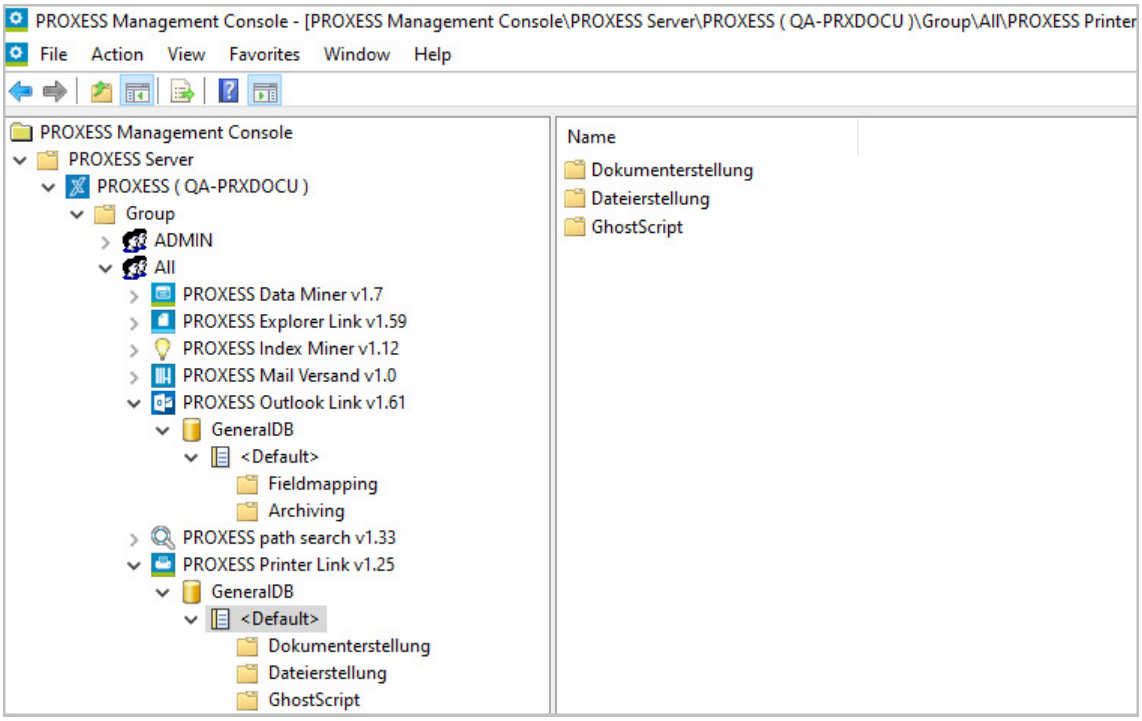


Fig.: Overview of the configuration options of the PROXESS Printer Link

To use these functions as the user, select the printer with the name “PROXESS Printer” in the print dialog of the respective application.

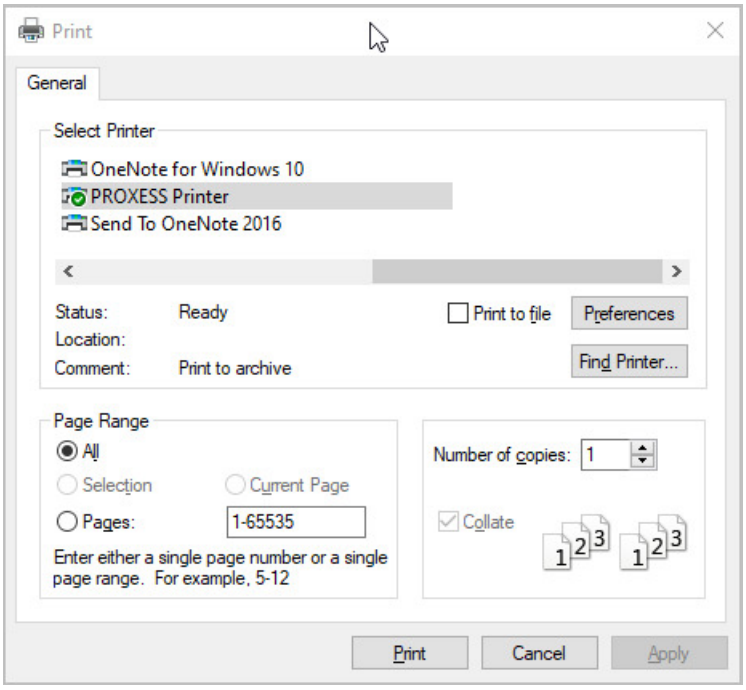


Fig.: "PROXESS Printer" in the print dialog box

Configuration of the PROXESS Signature

You have already added the “User settings” option as a module and selected a new profile for a user group, an archive and a document type. The following dialog box now appears:

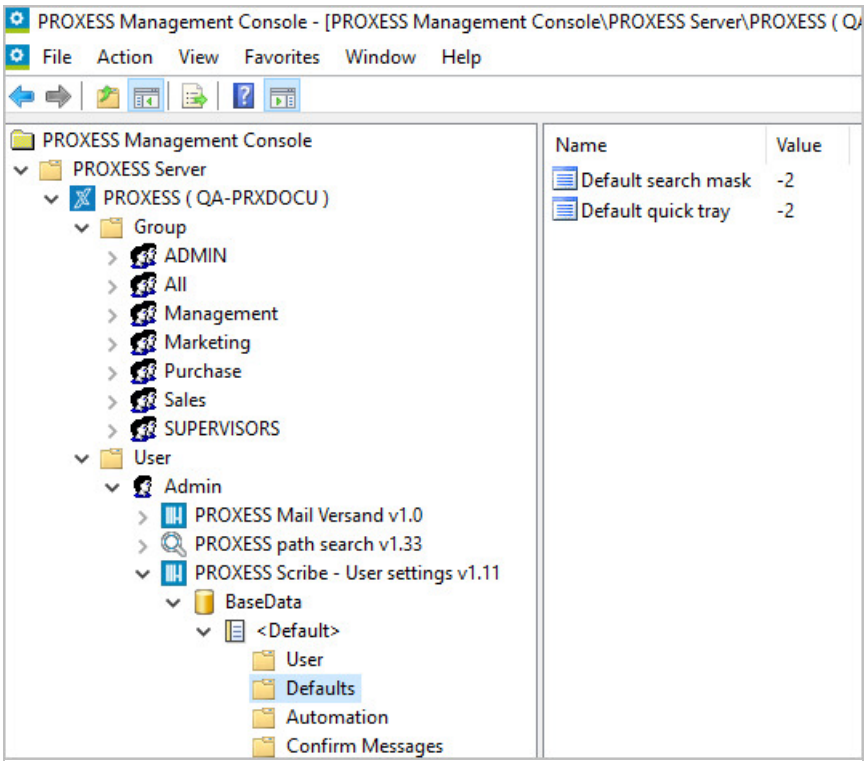


Fig.: Setting options for “User settings” for the “Admin” user in the “ArchiveDB” database for all document types

The following settings for active emailing from the PROXESS Standard Client are possible:

Add signature	If this option is activated, a signature is added when sending emails from the PROXESS Client. The type and content of this signature are described in more detail below.
Spacing	Specifies the spacing between the signature and the actual email text. The specification is made in lines: Example: An entry of “2” means a spacing of two lines.

<table>
<tr>
<td>Signature text</td>
<td>
The signature is described here:

The following user variables are available as constants here:

<table>
<tr><td>%USERNAME%</td><td>PROXESS login name</td></tr>
<tr><td>%USERFULLNAME%</td><td>PROXESS user name</td></tr>
<tr><td>%FRIENDLYNAME%</td><td>Displayed email name</td></tr>
<tr><td>%MAILADDRESS%</td><td>Email address</td></tr>
<tr><td>%DATE%</td><td>Date</td></tr>
<tr><td>%TIME%</td><td>Time</td></tr>
<tr><td>%DATABASE%</td><td>PROXESS database</td></tr>
<tr><td>%DOCUMENTTYPE%</td><td>PROXESS document type</td></tr>
</table>

When sending emails from PROXESS, these constants are copied to the character sequence with the equivalent values. Please pay attention to capitalization when entering the constants.

Example of a signature with user variables:

pp. %USERNAME%
PROXESS GmbH
Westerwaldstr. 29
56579 Rengsdorf, Germany
Phone +49 (0) 2643 66 55 300
Fax. +49 (0) 2634 66 55 398
%MAILADDRESS%
</td>
</tr>
<tr>
<td>Use user variables</td>
<td>Specifies whether specific constants are to be replaced with session-dependent variables in the signature.</td>
</tr>
</table>

	Before exiting the program or before logging out, you have to explicitly save the settings you made. For this purpose, you can select the “Apply settings” function in the context menu of the module. Alternatively, you can select the “Apply all settings” function in the context menu of the PROXESS server. With this, the settings of your entire session are saved for all modules. If the settings are not applied, the changes of the current session will be lost. Only when changes are saved are they then sent to the PROXESS server and available at every workstation.

See also:
Documentation for PROXESS user/emailing

About PROXESS Signature

These settings are based on the emailing of PROXESS documents from the **PROXESS Windows Client**.

Many other user-specific settings can be found in the PROXESS Windows Client itself.

PROXESS Web Client save masks

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

Quick trays contain:

- A specific 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 quick tray favorites

The setup of quick trays is carried out directly in the PROXESS Web Client program either by the administrator or by the user themselves and can only be viewed here.

PROXESS Web Client search masks

PROXESS search masks are templates for keyword searching in the PROXESS Web Client. Search masks can contain a specific selection of fields and pre-allocations in the fields.
There are personal search masks and search masks which the administrator has created for specific user groups.

The settings for this are carried out directly in the PROXESS Web Client **either by the administrator or by the user themselves** and can only be viewed here.

PROXESS Web Client hit lists

You can adjust the hit list layout in the PROXESS Web Client by moving columns, changing their size or hiding them completely. You can create various layouts for the hitlist and save them.

The settings for this are carried out directly in the PROXESS Web Client program **either by the administrator or by the user themselves** and can only be viewed here.

PROXESS Web Client administrator settings

The settings for filter searching for the PROXESS Web Client are displayed here.

Once the user has executed a quick search in the PROXESS Web Client, they get a hit list with filter functions. These filters are specified directly in the PROXESS Web Client by the administrator and can only be viewed here. The fields selected as filters, their visibility and their order are displayed here.

PROXESS Web Client user settings

User settings for the PROXESS Web Client (PROXESS Scribe) can be made in the PROXESS Management Console and in the PROXESS Web Client program.

	**We recommend not making any settings here.** **The user can make their own user settings in the PROXESS Web Client under the "Settings" menu item.**

About PROXESS Web Client

You can use the PROXESS Web Client with all common browsers and on mobile end devices.

Most settings are carried out directly in the PROXESS Web Client program either by the administrator or by the user themselves and can only be viewed here.

Copying Scan Link profiles

Scan Link profiles are **not** created in the PROXESS Management Console, but rather in the PROXESS Scan Link. The profiles can be transferred to the PROXESS Management Console from there. Only then are they available for viewing in the PROXESS Management Console. Scan Link profiles can also only be edited and modified in the PROXESS Scan Link.

Scan Link profiles can be distributed to other users or groups or copied and saved with a different name here. This new profile can also then be distributed to other users again.

Administrator rights are required to distribute or copy profiles.

Step by step:

- Connect to the PROXESS server.
- Open the administrator group.
- Select the PROXESS Scan Link module.

All transferred profiles are automatically displayed in the administrator group. Should there not be a transferred profile, the “PROXESS Scan Link” branch will not appear.

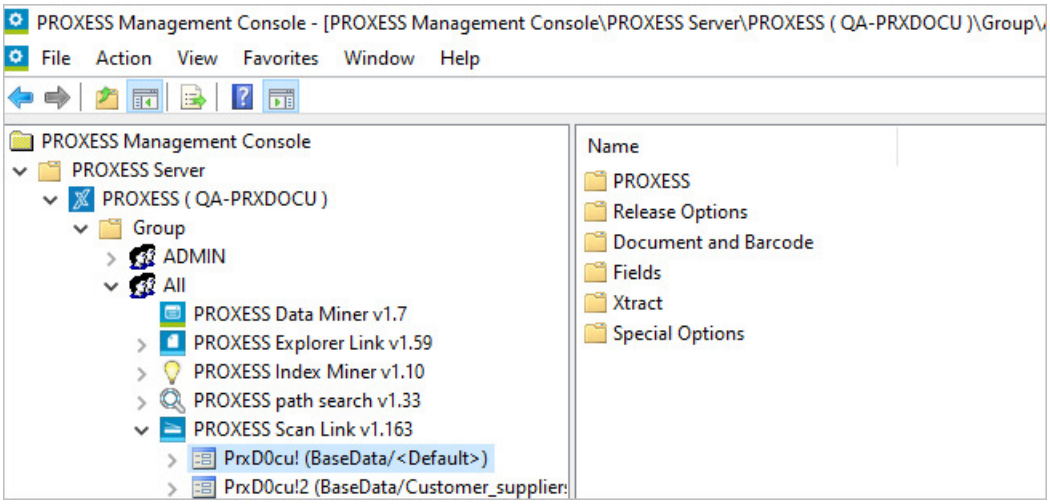


Fig.: Transferred Scan Link profiles

Select the **Copy** command in the “Action” menu or the context menu.

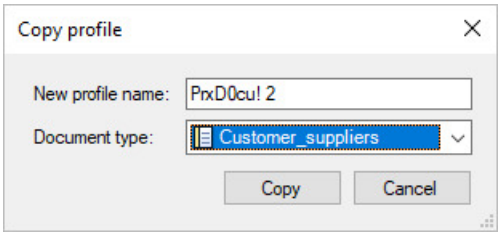


Fig.: “Distribute Scan Link profile” dialog box

- Select the new name for the profile.

- Select the new document type.
- Profiles can only be copied within a PROXESS database. The current database can be found after the name of the scan profile in parentheses.

"Gen_ScanStack (Dynamics/ScanPool)" example:
Gen_ScanStack = Name of the existing scan profile
Dynamics = Database of the existing profile
ScanPool = Document type of the existing profile

- Then select the **Copy** command.

The copied profile is displayed in the list of existing Scan Link profiles.

Should a Scan Link profile already have been distributed to specific users/groups, it can also be copied on this level. The copy is then only available to the respective user/group.

Distributing Scan Link profiles

Scan Link profiles are **not** created in the PROXESS Management Console, but rather in the PROXESS Scan Link. The profiles can be transferred to the PROXESS Management Console from there. Only then are they available for viewing in the PROXESS Management Console. Scan Link profiles can also only be edited and modified in the PROXESS Scan Link.

Scan Link profiles can only be distributed to other users or groups here. It is also possible to copy a profile and save it with a different name. This can also then be distributed to other users again.

Administrator rights are required to distribute or copy profiles.

Select the PROXESS Scan Link module. The transferred profiles are displayed automatically. Should there not be a transferred profile, the “PROXESS Scan Link” branch will not appear.

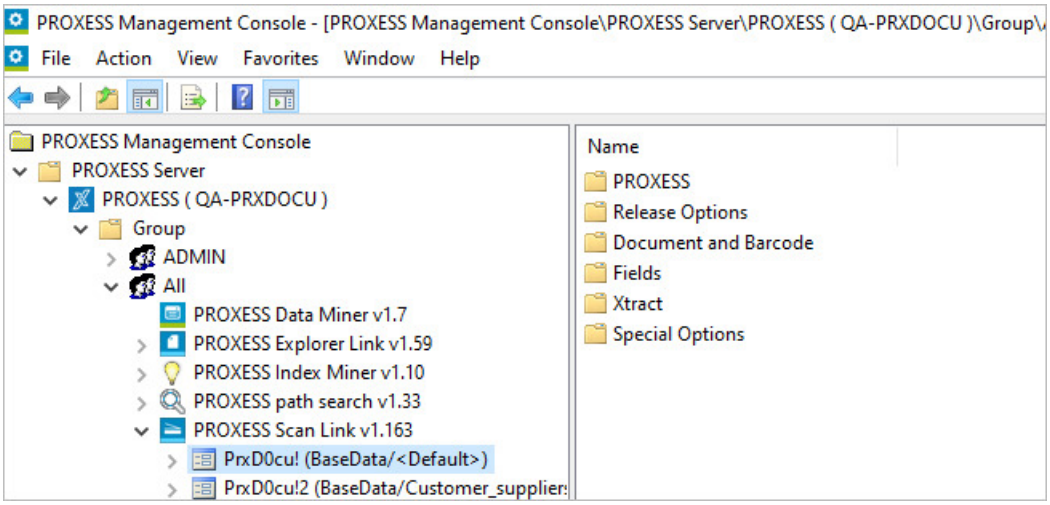


Fig.: Transferred Scan Link profiles

Select the **Distribute** command in the “Action” menu or the context menu.

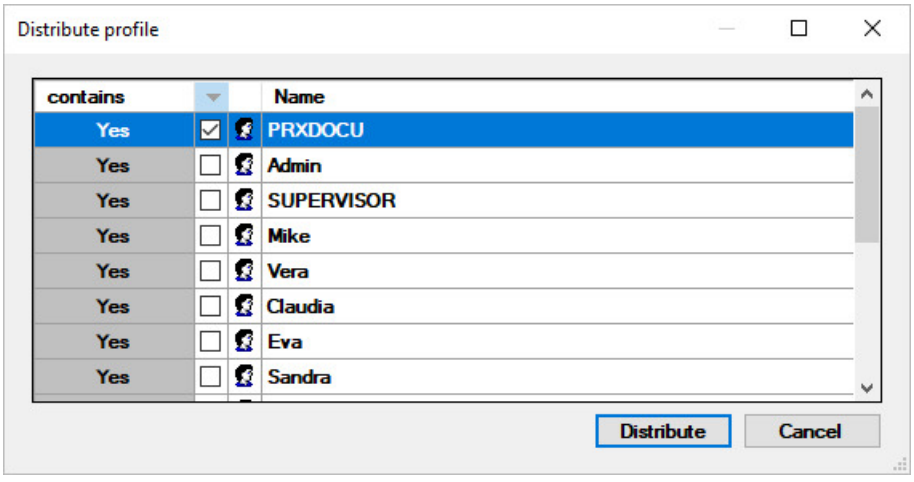


Fig.: “Distribute Scan Link profile” dialog box

Select the desired users/groups which are to use this profile and select the **Distribute** command.

The distributed profiles are now displayed in the node of the respective user/group.

	If you edit the profile in the PROXESS Scan Link, the new settings are not transferred to the distributed users/groups automatically. **A new transfer to the Management Console and a new distribution to the users/groups is required for this.**

Copying a profile

Each context profile always has an assignment to:

– a database
– a group or a user
– a specific document type or as a default profile for all document types of the database

Context profiles can be distributed and/or (as described here) copied from one document type to another. **Administrator rights** are required to distribute or copy profiles.

Step by step:

- Connect to the PROXESS server.
- Open the desired group/user (e.g. the “Everyone” group).
- Select the desired module (e.g. PROXESS Explorer Link).
- Select an existing profile (e.g. “Press release”).

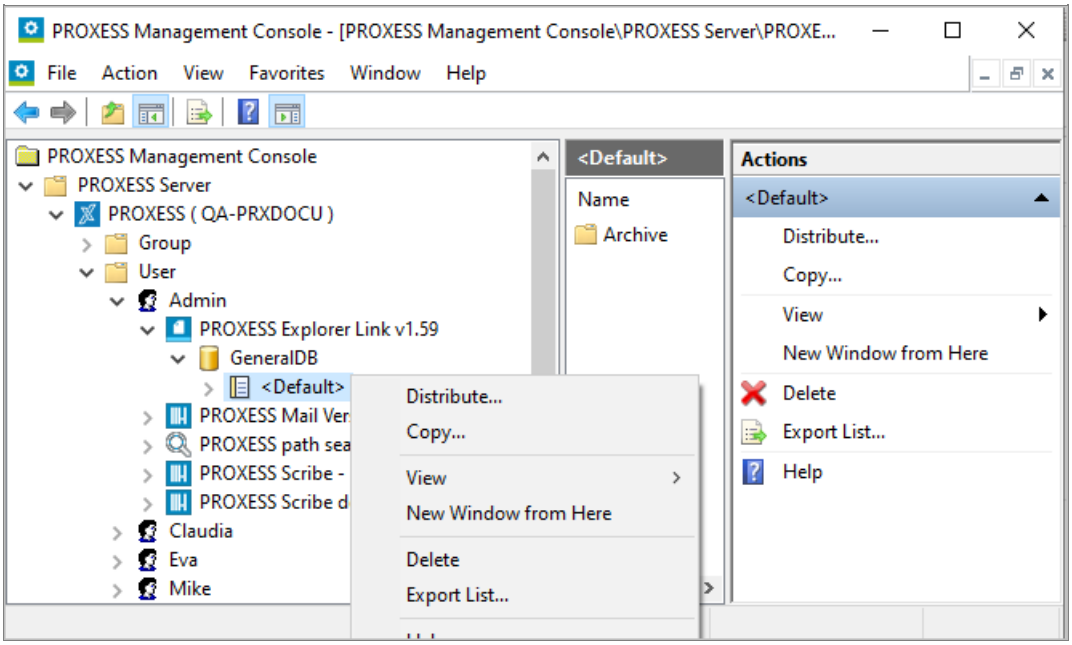


Fig.: Selection of a context profile for copying

- Select the **Copy** command in the “Action” menu or the context menu.

The following dialog appears:

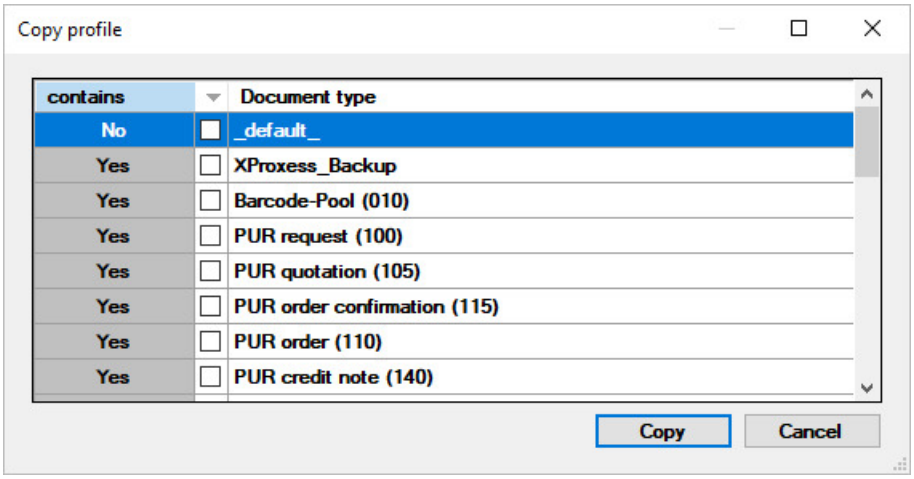


Fig.: "Copy profile" dialog box

In the list, you can see the document types for which profiles already exist.

	A "Yes" in the list only indicates that a profile exists for this document type. The settings of the profile can deviate from the profile which is now to be copied here. **If you do select such a profile in this dialog for copying, its settings will be overwritten.**

- Select the new document type (multiple selections can be made). Profiles can only be copied within a PROXESS database.
- Select the **Copy** command.

The copied profile is now displayed in the list of existing module profiles.

Distributing a profile

Context profiles have an assignment to:

- a database
- a group or a user
- a specific document type or apply as a default profile for all document types of the database

Named profiles also have the assignment. They also have a free profile name, however, which are Scan Link profiles or Emailing profiles, for example.

	Scan Link profiles are not set up here in the PROXESS Management Console, but rather in the PROXESS Scan Link program, and then transferred to the PROXESS Management Console in the admin group for viewing and distribution.

Profiles can be distributed and/or copied from one document type to another. **Administrator rights** are required to distribute or copy profiles.

Step by step:

Connect to the PROXESS server.
Open the desired group/user (e.g. the “Everyone” group).
Select the desired module (e.g. PROXESS Explorer Link).
Select an existing profile (e.g. “Press release”).

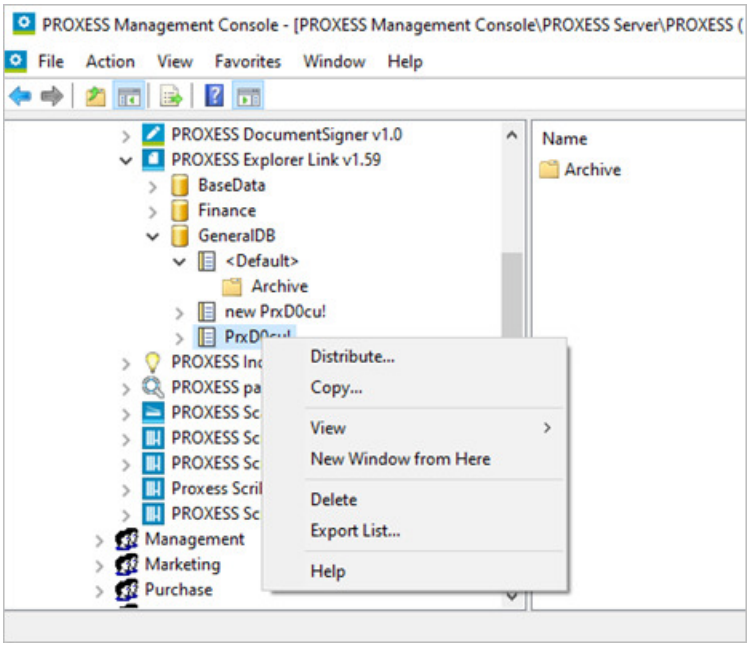


Fig.: Selection of a context profile for copying

Select the **Distribute** command in the “Action” menu or the context menu.

The following dialog appears:

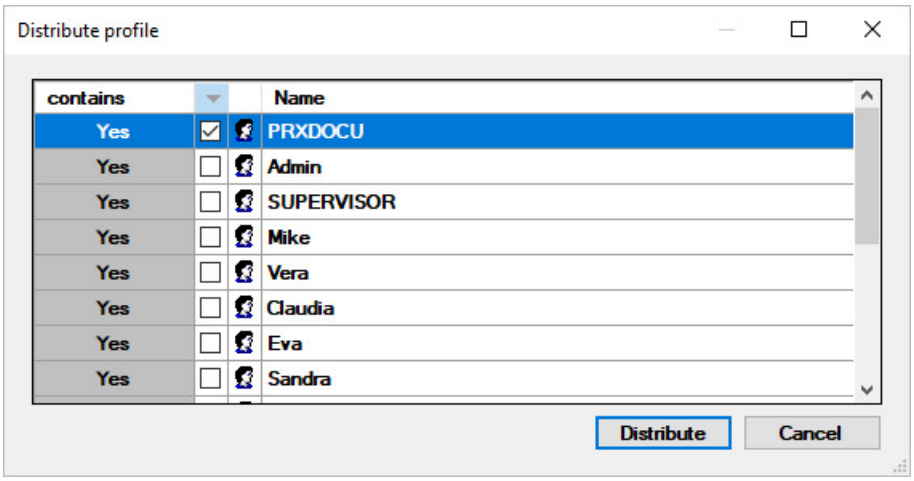


Fig.: "Distribute profile" dialog box

In the list, you can see the users/groups for which a profile already exists for this document type.

Warning information

	A "Yes" in the list only indicates that a profile exists for this user/group. The settings of the profile can deviate from the profile which is now to be distributed here. **If you do select such a user/group in this dialog, the profile settings will be overwritten.**

Select the users/groups for the distribution (multiple selections can be made). Profiles can only be distributed within a PROXESS database.

Select the **Distribute** command.

The profile is now displayed for all users/groups concerned.