HABEL® DMS

User manual

Post Basket

HABEL DMS R23

Translation of the original software manual

HABEL — Document management, R23, 4, en_US

Table of contents

1 Introduction

1.1 Preface

The document management system textvar object does not exist is a database-supported management system for electronic documents.

This software manual is intended to assist you with your responsible tasks with textvar object does not exist.

If you have any questions about the system, our support staff will be glad to help you.

1.2 Overview

This user manual is aimed at users who work with the post basket. It explains the specific functions and settings.

1.3 Symbolism in this manual

General symbols

This list marks the description of actions for you to perform.

■ This item marks bulleted lists.
  – This line marks lists on the second level.

Cross references

Cross references are displayed as follows: ✍ *"General symbols" on page 4*

1.4 Information regarding this manual

The details of the figures may vary from your textvar object does not exist document management as they may include functions that were not purchased or activated for your system. These can generally be easily added to your system. Please speak to your customer support agent about this.

Please send any suggestions, requests or criticism to **hand-buch@habel.de**. Thank you.

The captions and specifications in this manual are only used as examples and therefore can't be applied 1:1 to every situation. For that reason, you should consider your situation individually.

2 Working with the post basket

2.1 Layout of the post basket mask

Open the *"textvar object does not exist post basket"* with the post basket icon.
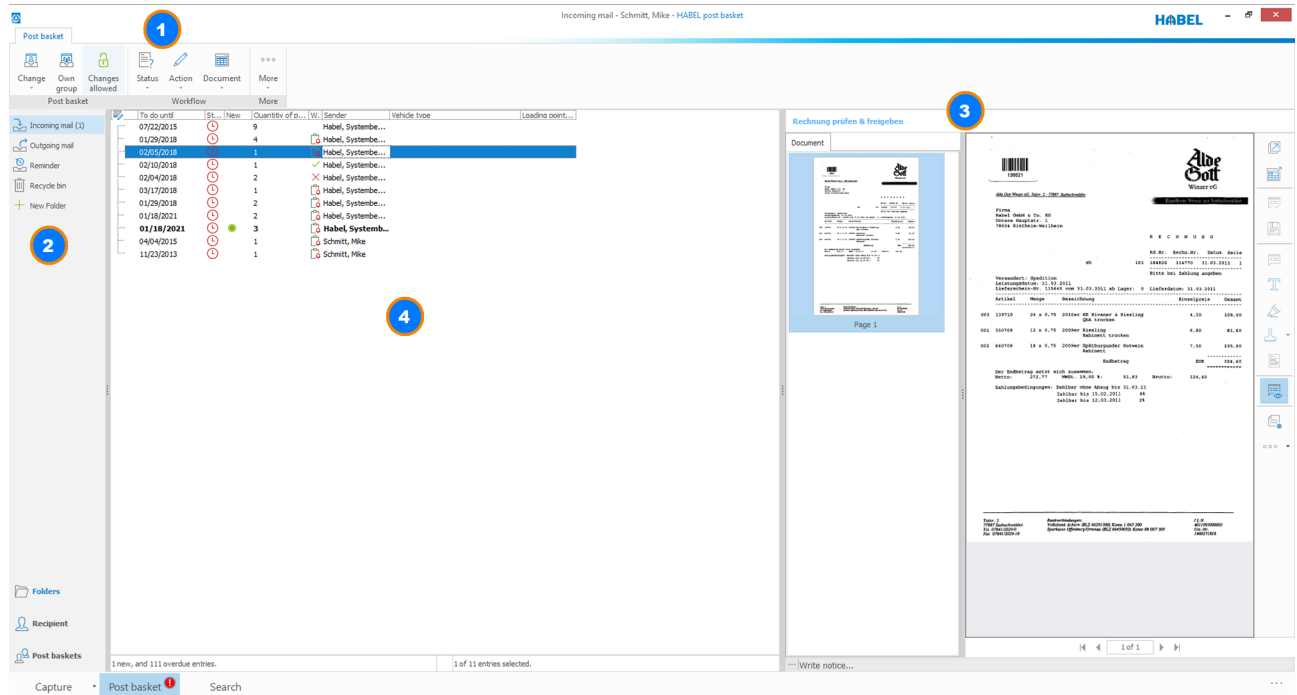
Fig. 1: Post basket mask layout

1 Menu bar
2 Folder selection (navigation bar)
3 Document preview (can also be undocked and freely positioned as a separate window)
4 Hitlist with the procedures set in this post basket

The program includes an overview of all the messages allocated to you.

Customize menu ribbon
The menu ribbon can be customized. Here, you will be able to customize all functions displayed in the menu ribbon.

Proceed as follows to customize the menu ribbon:

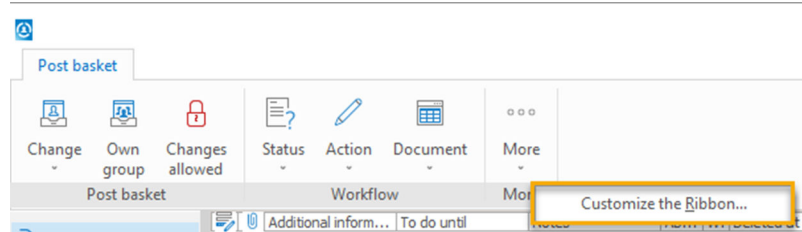*Fig. 2: Customize menu ribbon*

1. ▷ Right-click on the menu ribbon and open the menu *"Customize menu ribbon"*.
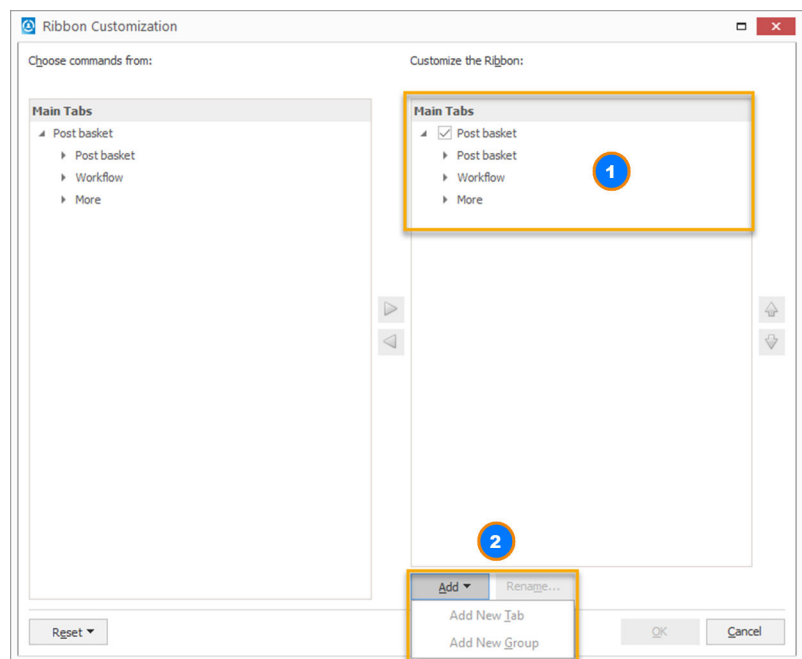

Fig. 3: Add group

1 Menu ribbon
2 Adding a new tab/new group

2. ▷ You can add new functions via the *[Add]* button.

Adding a new tab   - A new tab is added.

Adding a new group - A new group is integrated into the current tab.

> *In this example, we will add a group.*
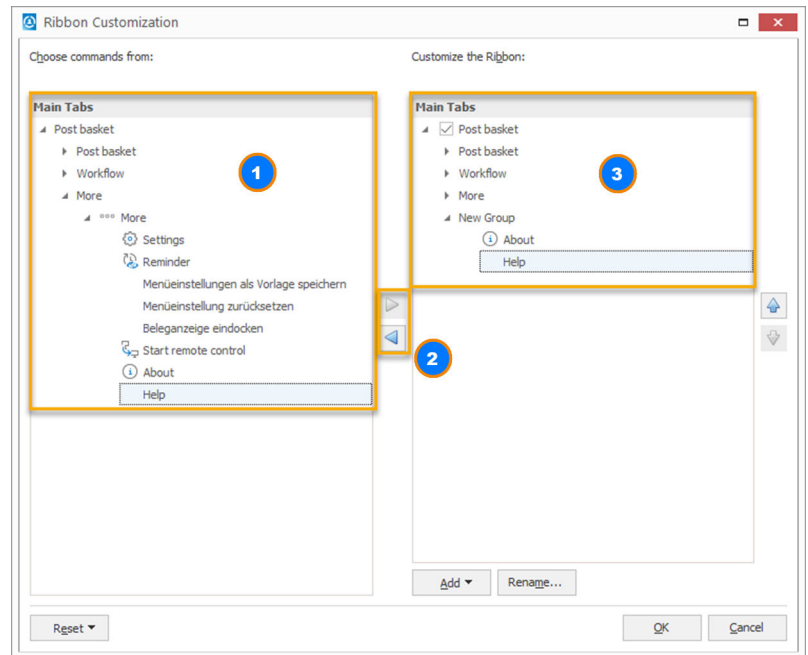
Fig. 4: Add

1   Available commands
2   Add/remove commands
3   Menu ribbon

3. ▶ A new group has been added. Now you can integrate the
desired function into your group in the area *"Command
selection from:"*.
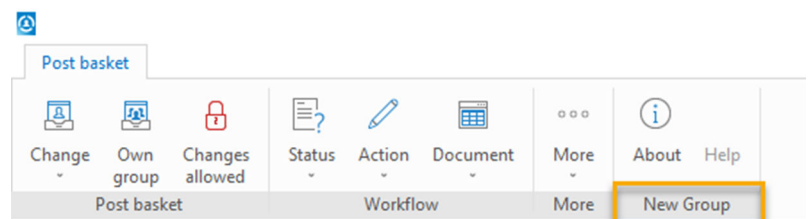
Fig. 5: Result

⇨   The menu ribbon has been customized.

2.2 Menu bar in the post basket

My post basket
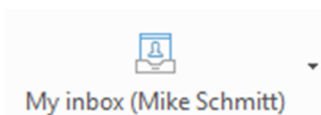
All post baskets of the other post basket users and the group post
baskets are listed below the *"My post basket"* command. You can
select the post basket you want to view from the selection list. To
do this, you need to have access rights to the other user's post
basket.

By clicking on the button symbol, you open your own post basket.

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Own group

Click the *"Own group"* command to call up the group post basket that has been set for monitoring. If you make a new entry in the group post basket, you will also see a letter symbol.

Only one group post basket can be monitored.

Changes allowed

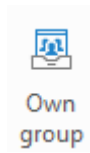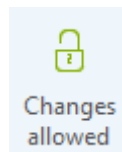This symbol defines whether you are allowed to make changes to the selected post basket, depending on the rights you have been allocated. This must be done manually, where applicable.

If the padlock is open, changes are allowed.

If the padlock is closed, changes are not allowed.

Status
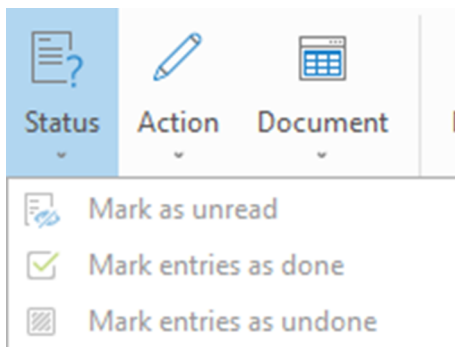
Fig. 6: Status

Caption	Description
Mark as unread	Use *"Mark as unread"* to mark entries in the post basket that have been marked as read.
Mark entries as done	Entries in the post basket that have been actioned can be marked accordingly with the *"Mark entries as done"* command. The entry is only moved to the recycle bin (i.e. deleted) if this is set in the options.
Mark entries as unfinished	Entries in the post basket that have been marked as done can be marked as unfinished with the *"Mark entries as unfinished"* command.

Action
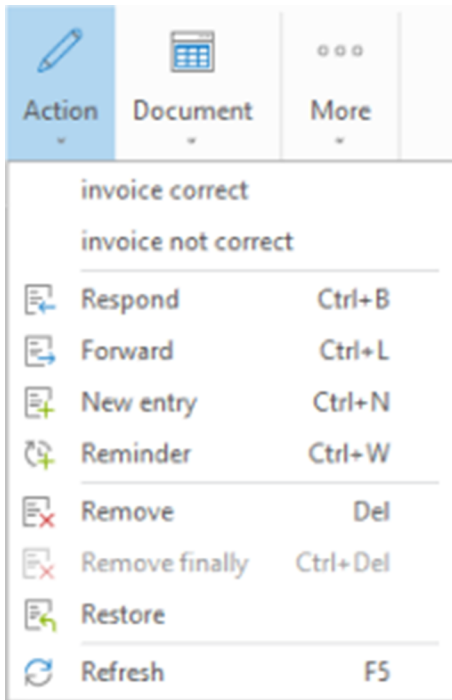
The captions *"Invoice correct"* and *"Invoice incorrect"* as well as the workflow functions can be named individually.

Fig. 7: Action

Caption	Description
Invoice correct	If you are satisfied with the content of the document (for example if the purchase invoice is correct), select the command *"Invoice correct"*.
Invoice incorrect	If you want to refuse payment release, choose the command *"Invoice incorrect"*.
Respond	Alternatively, you can respond to post basket entries if you want to convey information to the sender of the post basket entry. To do this, use the *"Respond"* command. This opens the *"Respond to entry"* selection box
Forward	Entries that are to be forwarded with the same message to other post basket users can be processed using the *"Forward"* command. If you have **not** specified in the options that forwarded entries, entries that have been responded to and/or new entries are to be deleted immediately, this procedure will remain in your incoming mail.
New entry	If you want to set the entry in your post basket for another person and provide information with it such as queries, instruction for further processing etc., select the command *"New entry"*. The entry will remain in your post basket until you delete it.

Caption	Description
Reminder	Entries that are to be processed later and hidden in the incoming mail until this date can be assigned a reminder date. The reminder date is linked to the post basket (and not to the document) and is only seen by the post basket owner or the users who access this post basket. You can enter a specific date when the procedure is to be unhidden again or set the reminder date with the arrow keys in daily, weekly, monthly and yearly steps. It is also possible to store notes for this procedure which will serve as memory aids for the reminder. You can show or hide the reminder at any time for the entries in the incoming mail for which a reminder is currently set by selecting *"More ➔ Settings ➔ General"* .
Delete	You can delete the entry from your post basket using the menu, the *[Delete]* key or the context menu. Entries deleted from the incoming mail are moved to the recycle bin. The entries can be permanently deleted from the recycle bin with the *"Permanently delete"* commands. If you want to restore the entry, you can do this too with the *"Restore"* command or by moving the entry to the Incoming mail folder using drag & drop.
Permanently delete	You can permanently delete the entries via the menu.
Restore	You can restore the entries via the menu.
Refresh	To check the post basket for new entries, you can update the view. To do this, use the *[F5]* key or the *[Refresh]* command.

Document
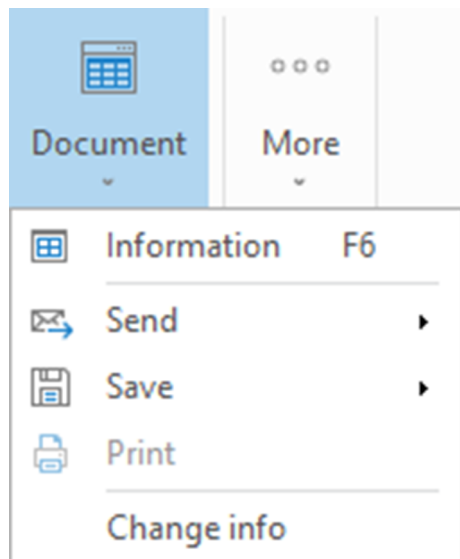
Fig. 8: Document

Caption	Description
Information	The information mask will then be displayed instead of the hitlist. In this mask, you can change to editing mode to change or add field content.
Send Send as attachment	The document is sent as an attachment to the message.
Send Send as PDF	The document is converted into a PDF file and sent.
Save Save as attachment	The document is saved as an attachment.
Save Save as PDF	The document is converted into a PDF file and saved.
Print	Select the printer symbol to print the document currently displayed. Depending on the settings, you will be asked for various options.
Change info	Use this function to leave an internal comment/information in the documentation for the subsequent employee. This information can be displayed in the hitlist via the database field with the same name.

More
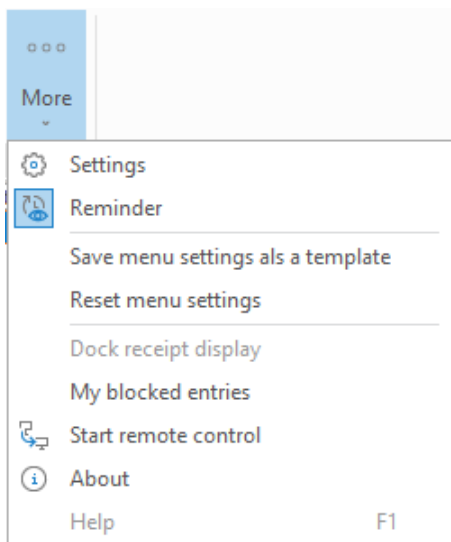
Fig. 9: Post Basket More

"Selection list ➔ More"	*"Settings"*	Here you can change the general settings to display the hits in the hitlist, notifications or additional actions from completed workflows, such as "delete hits marked as finished".
	"Show reminder"	Entries with a reminder are only displayed again in the post basket at certain times. To display all the entries which have a reminder, use the *"Show reminder"* command.
	"Start remote control"	When you execute the command *"Start remote control"*, you will be taken automatically to the download area and execution of TeamViewer. This enables a textvar object does not exist employee to access your workstation and make adjustments or provide help.
	"Information"	Under *"Information"*, you will find important details on your system version.

2.3 Folder selection (navigation bar)
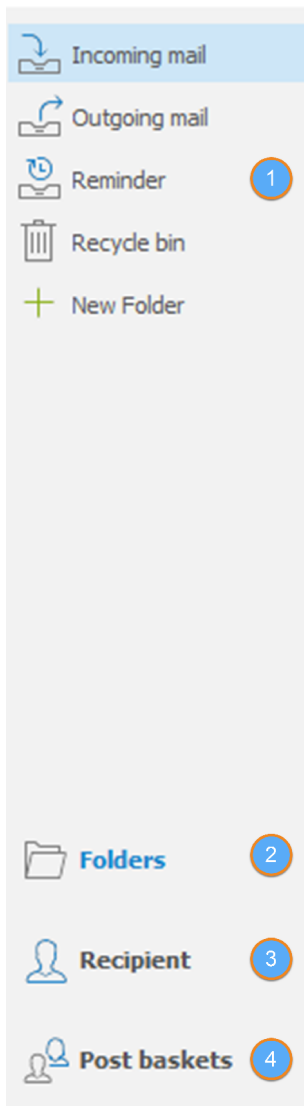
The navigation bar at the far left of the screen offers the functions *"Folders"*, *"Recipient"*, *"Post baskets"* and *"Settings"*. These can be used for better clarity/structuring and rapid access to the post basket. There is also a search box.

Under *"Folders"*, there are four default folders (Incoming mail, Recycle bin, Outgoing mail, Reminder). You can create more folders yourself.

The order of the folders can be changed using drag & drop. To create new folders, open the context menu by right-clicking on the *"Folders"* column. Folders that are newly created can also be deleted. To do this, use the *"Delete folder"* command. You can also use the context menu to configure settings in the properties.

Fig. 10: Folder selection (navigation bar)
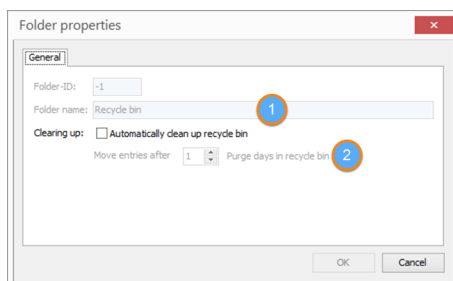
Fig. 11: Recycle bin properties

Both the *"Recycle bin"* and the *"Outgoing mail"* can be emptied automatically. To do this, right-click on the relevant folder. Select the *"Properties"* command in the context menu.

You can also change the name of each folder here (1). All entries that are moved to the recycle bin by deleting them from the incoming mail are by definition automatically cleared from the folder (you define the time). (2)

Recommendation: Use this function for both the recycle bin and the outgoing mail, because the post basket can become slower otherwise.

Contents (1)

Depending on the selection (Folders, Recipient or Post basket), these menus will show the functions.

Folders (2)

There are four default folders here (*"Incoming mail"* , *"Recycle bin"* , *"Outgoing mail"* , *"Reminder"*). You can create more folders yourself. Entries that belong in particular folders can be moved there using drag & drop. The order of the folders can be changed using drag & drop. To create new folders, use the context menu (right-click on the *"Folders"* column). Folders that are newly created can also be deleted (*"Delete folder"* command).

Recipient (3)

Recipient

Abele, Martin

Butschle, Klaus

Dilger, Oskar

Friedrich, Helmut

Fig. 12: Recipient

In the *"Folders"* column, you can store a recipient list for post basket users to whom you frequently forward entries. To create a 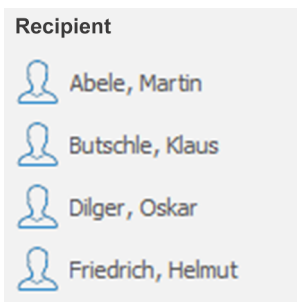recipient, right-click in the space below the item *"Recipient"* and select the *"Add"* command. A recipient selection box appears in which you can select multiple recipients at the same time (click while holding down *[Ctrl]* key).

When you right-click on a recipient, all entries in the context menu become active. With these commands, you can remove the recipient from the list or call up their unactioned entries. To send a message to a recipient from the list, you can drag the required entry to the recipient using drag & drop. The recipient then receives the entry as a forwarded entry. If you want to create a new entry for the recipient from the list, however, drag the message from your incoming mail to the recipient while holding down the right mouse button. Another context menu then appears for creating new entries (advantage of a new entry: you can select further recipients as well as enter messages and notes).

Post baskets (4)

In the *"Post baskets"* area, you can access the post baskets of the corresponding users. Only post baskets for which display permissions are set up are displayed. You can only edit other users' post basket entries if you have been assigned the rights for this.

Enter a name or an account in the search box. The post baskets available for selection will then be filtered. Only personal and group post baskets with names containing the text entered are displayed. Use the arrow keys to jump to the required entry and select it with the *[Enter]* key. Alternatively, click on the entry with the mouse. In the example below, all the post baskets with names containing the text entered are shown. All other entries are hidden. Pressing the down *[arrow]* key once highlights the second entry, **Friedrich, Helmut**. Helmut Friedrich's post basket is opened by pressing the *[Enter]* key.

2.4 Overview of the symbols

Various symbols are displayed within the post basket entries relating to forwarding, actions, workflow action etc. An overview of the symbols that appear and their meanings is shown below.

Fig. 13: Examples of symbols

	The entry is new.
	The entry is urgent.
	The entry is overdue. A deadline has passed.
	The entry is in the workflow and needs to be processed by the recipient.
	The entry is in the workflow, but is blocked for some reason.
	Entry has reached the end of the workflow (customer-specific symbol).
	The entry is at the end of a workflow or release chain. No further workflow actions are possible here. This also includes info entries etc. from the workflow.
	The entry has been forwarded by the recipient.
	The entry has been actioned.
	Workflow positively continued/payment release granted.
	The absence rules could not be used because an infinite loop occurred.
	The release was denied/workflow was negatively continued.
	Time-critical (overdue and/or urgent) entries present.

	New and time-critical (overdue and/or urgent) entries present.
	New entries present.
	No special entries present.

2.5   Create post basket entry

2.5.1   Predefined workflow with specific rules

If an entry was created via a workflow, you will see the following symbol.

Example of visual representation of a workflow:
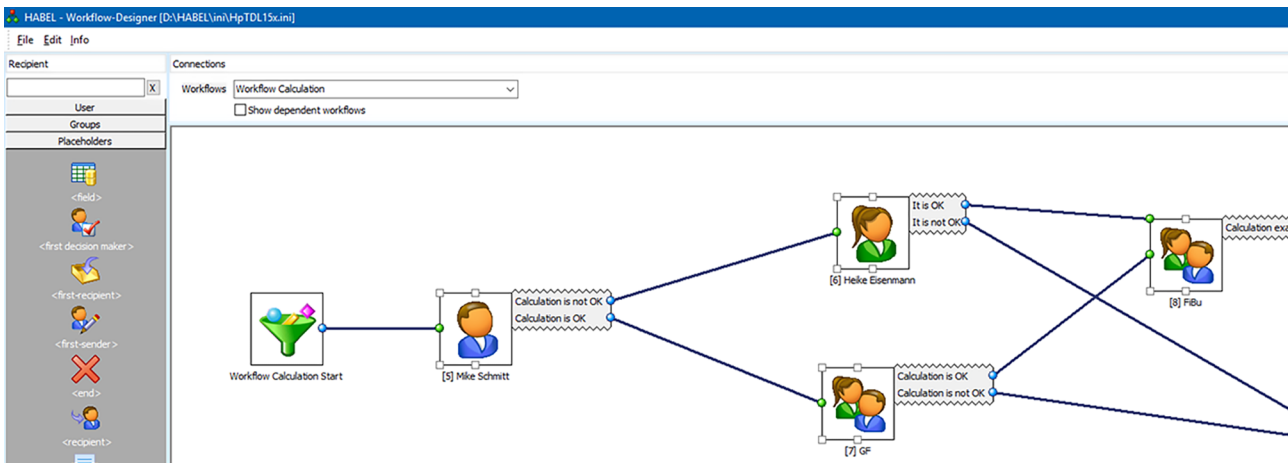

Fig. 14: Example of workflow

Workflows are created on a custom basis and can be modi-fied by an administrator with the *"textvar object does not exist WORKFLOW Designer"* module.

Clearance — No clearance

Workflows are stored on a customer-specific basis and are often very complex. Your textvar object does not exist project manager can instruct you on your defined workflows.

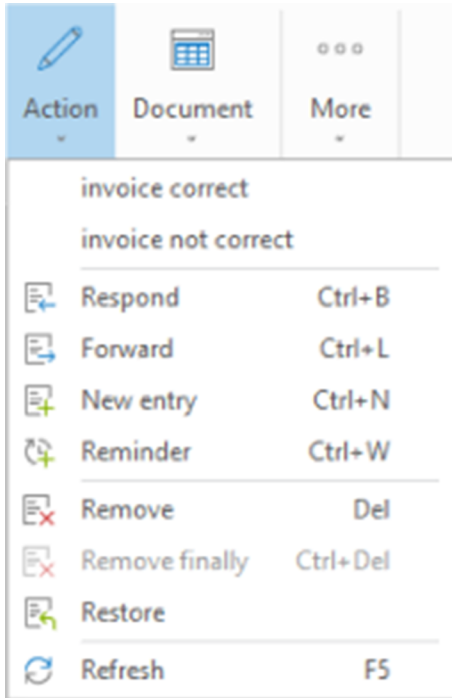**Practical example based on clearance of invoices:**

Fig. 15: Clear invoice

If you are satisfied with the content of the document (for example if the purchase invoice is correct), select the command *"correct"*. The next station in the workflow (in this case the Accounts department) receives an entry with the message *"Invoice released"*.

If you want to refuse payment release, choose the command *"incorrect"*. It is possible to define that you need to provide a reason for this.

The next station in the workflow receives the entry with the message that you previously entered as the reason for refusal.

When the workflow reaches the end of the chain, the hand symbol appears lighter. This symbolizes the end of the workflow: no further actions are possible. Payment release or refusal are no longer possible either. The procedure can only be marked as finished. Info entries etc. which result from a workflow and for which there is no further workflow action are also marked with a light hand symbol.

2.5.2 Post basket entry from COLD procedure

Documents that are archived directly in from external applications such as ERP programs in textvar object does not exist can be sent directly to stored post basket recipients based on defined criteria (e.g. document type).

2.6 Post basket settings

You can adjust various settings with the command *"More ➔ Settings"* . Another menu opens.
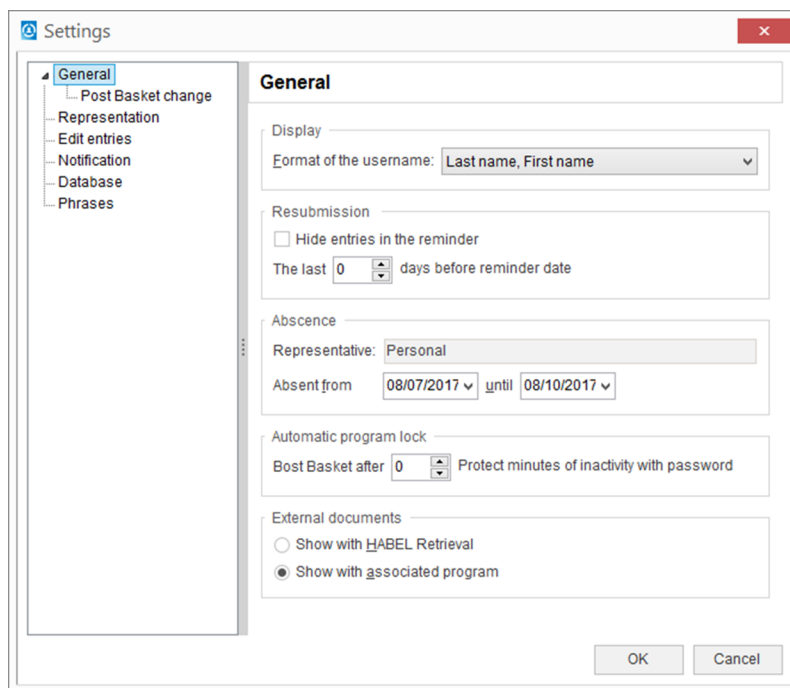
Settings — General

Fig. 16: "Settings ➔ General"

"Representation"	Selection of "Format of user names"	With this setting, you can define how the sorting/ order of the user names appears in the post basket recipient selection. This sorting/order is also used in the same way for selecting external post baskets.
Reminder	Checkbox "Hide entries in the reminder"	A reminder can be set for procedures that are to be edited later. To keep these entries in the incoming mail without them getting in the way, they can be hidden until the reminder date. You can also set a date before the actual reminder date, from which time onwards the entries will be displayed again.
Absence	Entry of "Representative" Absent from... to...	This setting shows who the representative is in case of absence. You can also define the period of absence. The representation rules are defined in a separate program (see Absence rules, item 5).

Automatic pro-gram lock	Entry Protect *"Post basket after ... minutes of inactivity with a password"*	To keep your entries in the post basket secure, you can set up an automatic program lock. After this time has passed, access with the login will be blocked.
		Please consult with your administrator about which password is stored for you in the user administration before setting password protection.
External docu-ments	Selection of *"Display with textvar object does not exist Retrieval"* or *"Display with external program"*	This setting lets you select whether files that are in their original format (e.g. *.doc, *.pdf) are to be opened in the original program (e.g. Word, Adobe Reader) by double-clicking on the hit in the *"textvar object does not exist post basket"*, or whether they are to be displayed as a preview in the textvar object does not exist retrieval.

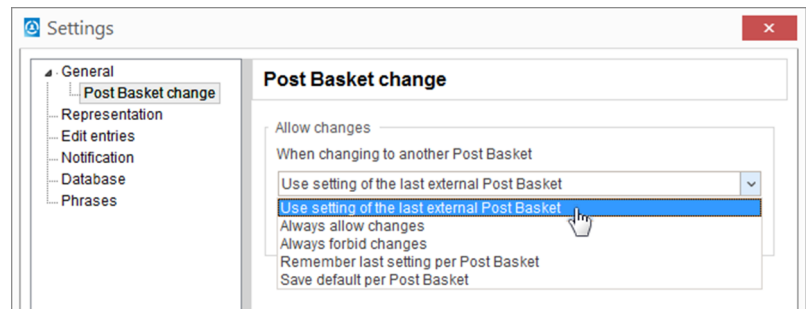**Settings — General — Post basket change**

Fig. 17: "Settings ➔ General ➔ Post basket change"

In the *"Post basket change"* area, you can select which basic settings are to be used for displaying post baskets.

The options correspond to the *[Allow changes]* button. In this area, therefore, you can set whether external post baskets are to be opened with change rights or as read only.

Only one person can work in a post basket with change rights at any one time. Everyone else then only has read access to the post basket. If an external post basket is opened with change rights, therefore, the post basket owner themselves cannot open the post basket with change rights.

Allow changes	*"Use setting of the last external post basket"*	The setting that was set in the last post basket used will also be used for the next external post basket. If *"Changes allowed"* was set for the last post basket of an external person, *"Changes allowed"* will also be set for the next external post basket, regardless of whose post basket it is.
	"Always allow changes"	Whichever post basket you look in, the system will always attempt to set *"Changes allowed"*.

	"Always forbid changes"	Whichever post basket you look in, it will always be opened without the setting *"Changes allowed"*. You can therefore only view entries in the external post basket as read only.
	"Remember last setting per Post Basket"	The setting that defines whether changes are allowed is saved for each post basket. A post basket is always opened with the setting last used in this post basket.
	"Save default per post basket"	You can set the change permissions with which each individual external post basket is to be opened. To do this, click on the *"Changes allowed"* symbol with the right mouse button to open the context menu. You can select from the four options described above in each individual post basket.

Settings — General — Representation
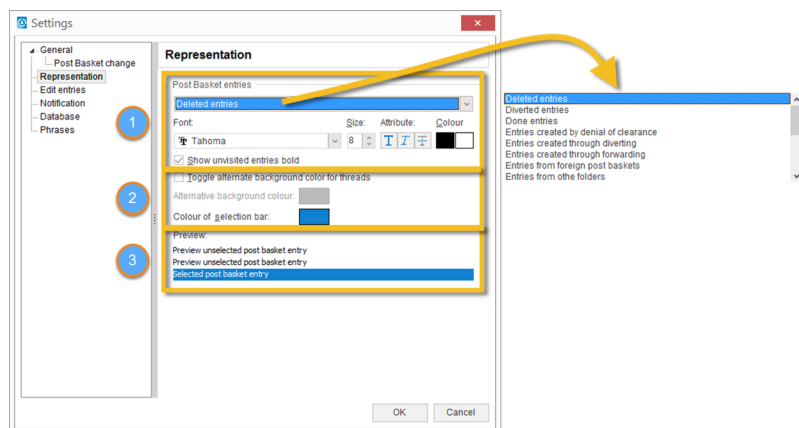
Fig. 18: "Settings ➔ Representation"

For a better overview, you can modify the colors and/or formatting of your entries according to urgency, editing status etc., depending on the post basket entry.

You can format the entries here (1)

- Font
- Size
- Bold, italic, strikethrough
- Font color selected/unselected

You can format the hitlist here (2)

- Different background colors for the procedures (yes/no)
- Color of the selection bar

The preview (3) shows the effect of the current formatting on the entries, so that you can correct this if necessary before applying the setting.

Settings — Edit entries

Fig. 19: Settings – Edit entries

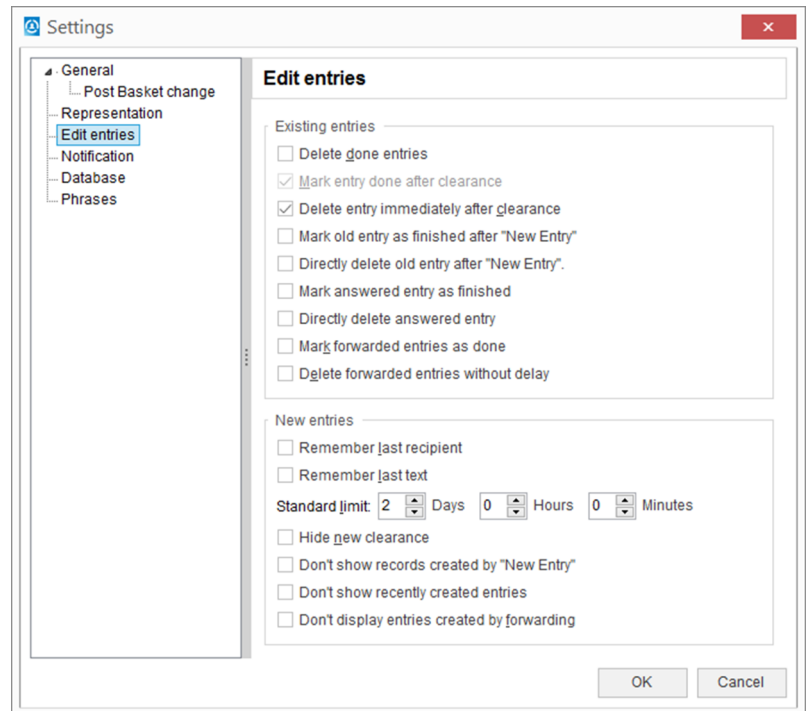| Existing entries	Checkbox *"Delete done entries"*	If an entry is marked as done, it is deleted immediately (moved to the recycle bin). Otherwise, it remains marked as done in the incoming mail.
	Checkbox *"Mark entry done after clearance"*	If a clearance option is set, the entry will be marked as done after clearance.
	Checkbox *"Delete entry immediately after clearance"*	If a clearance option is set, the entry will be marked as done after clearance and deleted (moved to the recycle bin). Note: No deletion of documents in the archive.
	Checkbox *"Mark old entry as finished after "New Entry""*	If a new entry was created from the entry, this remains unchanged in the incoming mail. If this function is activated, the "old" entry is marked as finished, but remains in the incoming mail.
	Checkbox *"Directly delete old entry after "New Entry""*	If a new entry was created from an entry, this remains unchanged in the incoming mail. If this function is activated, the "old" entry will be marked as finished and immediately deleted (moved to the recycle bin).
	Checkbox *"Mark answered entry as finished"*	If an entry has been answered, it remains unchanged in the incoming mail. If this function is activated, this entry is marked as finished, but remains in the incoming mail.

|		
	Checkbox *"Directly delete answered entry"*	When an entry has been answered, it will be marked as finished and immediately deleted (moved to the recycle bin).
	Checkbox *"Mark forwarded entries as done"*	When entries are forwarded, they remain unchanged in the incoming mail. If this function is activated, the entry is marked as done after forwarding.
	Checkbox *"Delete forwarded entries without delay"*	When entries are forwarded, they remain unchanged in the incoming mail. If this function is activated, the entry is deleted after forwarding (moved to the recycle bin). Note: No deletion of documents in the archive.
New entries	Checkbox *"Remember last recipient/Remember last text "*	These settings let you specify that the last recipient is to be remembered as the default. This is useful if, for example, you often use the same recipient for forwarding/new entries. The same setting is also possible for the last message. The standard limit for forwarding and for new entries is also specified here. This limit can be changed manually or deleted (i.e. unlimited).
	Checkbox *"Hide new release"*	If a release option is set and the release is initiated in your own post basket, you will not receive the entry again in an adjusted version (e.g. for procedures in review).
	Checkbox *"Don't show records created by "New Entry""*	If this function is activated, entries that were created with *"New Entry"* are moved to the recycle bin. Otherwise, the entry lands in the Outgoing mail folder of your own post basket and may need to be deleted from there (i.e. moved to the recycle bin).
	Checkbox *"Hide new responses"*	If this function is activated, entries that have been answered are moved to the recycle bin. Otherwise, the entry lands in the Outgoing mail folder of your own post basket and may need to be deleted from there (i.e. moved to the recycle bin).
	Checkbox *"Don't display entries created by forwarding"*	If this function is activated, entries that have been forwarded to others are moved to the recycle bin. Otherwise, the entry lands in the Outgoing mail folder of your own post basket and may need to be deleted from there (i.e. moved to the recycle bin).

Settings — Notification
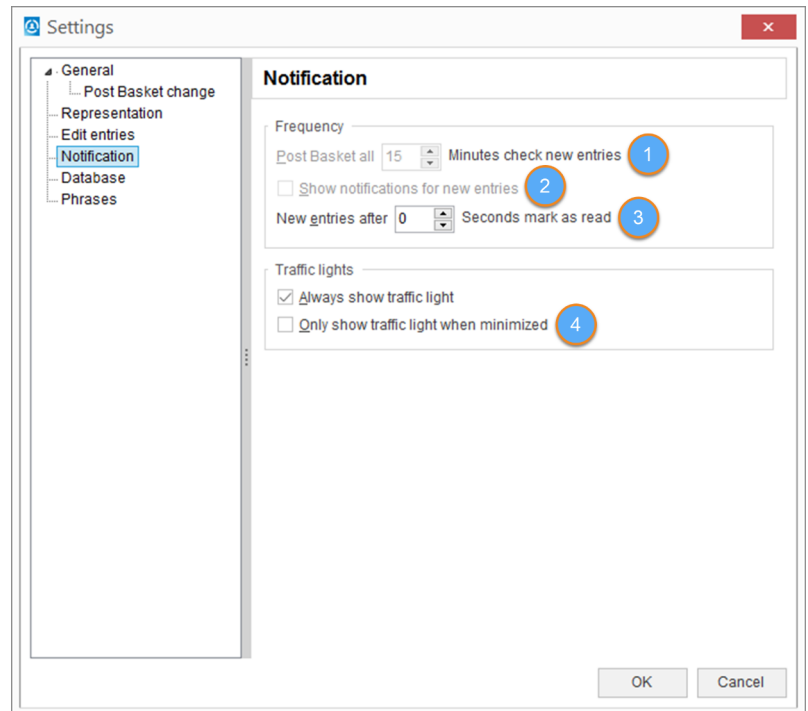
Fig. 20: Settings — Notification

In the *"Frequency"* section, you can set how often the post basket is checked for new entries and refreshed. (1) Important: If the value set is too low, this can lead to significantly higher use of network capacity which can have adverse effects on other applications or workstations in some cases. You can refresh manually at any time with the function key F5. A separate window can be displayed in the foreground for new post basket entries, to inform you of these new entries. This window will alert you to new entries even if you are working in another application at the time. (2) This function can be activated by selecting *"Show notifications for new entries"* in the menu.

This menu also lets you set how many seconds should elapse before the new entry is marked as read (3). You can set values between 0 and 10 seconds. The seconds are counted from when the entry is displayed.

The post basket symbol is a traffic light. This can be displayed permanently in the info area of the task bar of your screen, or alternatively only when the post basket is minimized. (4).

If the traffic light is red, there are overdue entries in the post basket; new entries have a green light.
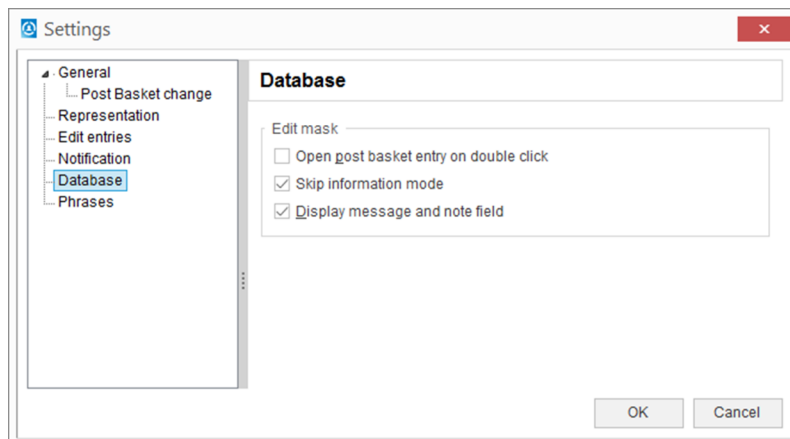
Settings — Database

Fig. 21: "Settings ➔ Database"

Editing mask	Checkbox *"Open post basket on double click"*	To call up the editing procedure, double-click the entry to open the information mask. If this function is not activated, double-clicking the entry will take you to the document view (depending on the file format, usually, however, the retrieval).
	Checkbox *"Skip information mode"*	To open the editing mask directly without first going into information mode, activate the "Skip information mode" field. If you use the function "Open post basket on double click" or select the *[Information]* button, you will go directly into editing mode.
	Checkbox *"Display message and note field"*	In editing mode, you can display the message supplied with this procedure during capture as a post basket entry, as well as a note field for your own notes regarding this procedure (not added to the document). To do this, activate this function.

The information entered here is only displayed to the current post basket user. It is not visible to other users and workflow participants. To specify information that is visible to all users, you can add an annotation to the document in the form of a note. |
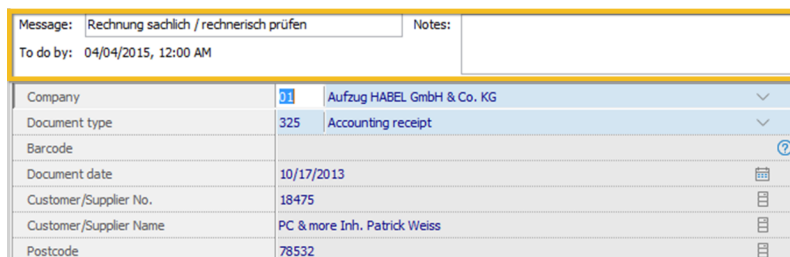

Fig. 22: "Information ➔ Message and note field"

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

Settings — Phrases

When you create new entries, you can add informative text, known as phrases. Further phrases can be added in the Settings, and can be executed by the administrator.
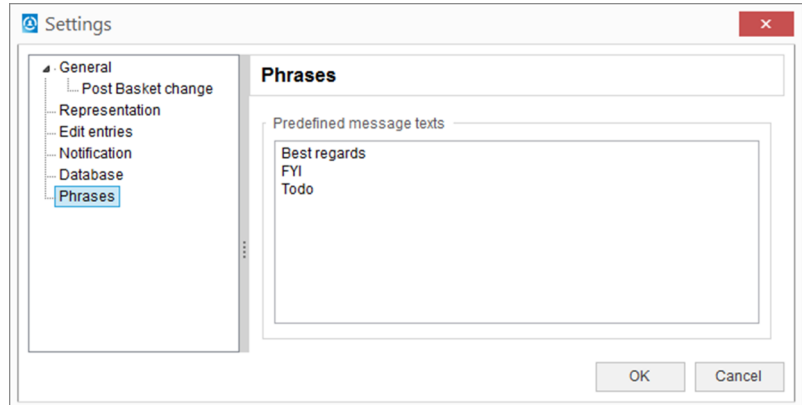

Fig. 23: "Settings ➜ Phrases"

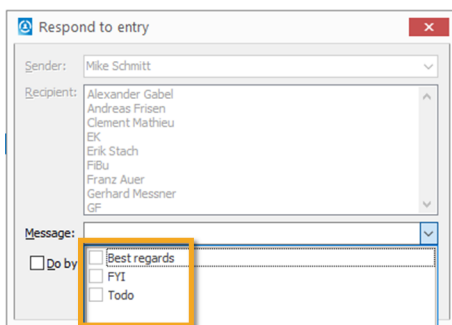The added phrase appears in the selection box for new entries.

Fig. 24: Selection of the message

> *All stored phrases are standardized for all users.*
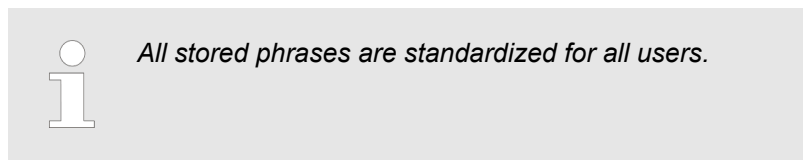
2.7 Hitlist

Context menu in the hitlist for the columns (right-click on the column heading)

If you right-click on a column heading, this opens another context menu where you can define settings relating to the view of the columns.

The context menu includes the following menu items:

- Left-aligned
- Centered
- Right-aligned
- Column properties
- Optimize column width
- Optimize all column widths
- Cancel sorting
- Hide
- Select columns
- Copy column settings from

Fig. 25: Column properties

Fig. 26: Change column order

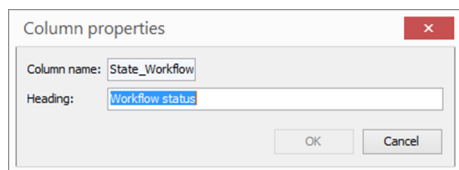You can display the values for the entries in the columns as left or right-aligned or as centered.

The column name can be changed under *"Column properties"*. The internal name does not change, and the name in the retrieval is also retained.

The menu item *"Optimize column width"* is used to adjust the column in which the context menu was opened to the optimum width for its longest entry. If you want to *"optimize all column widths"*, this command is available separately. The *"Hide"* option lets you hide columns; you can unhide them again with *"Select columns"*. *"Select columns"* also lets you access further columns that are not currently displayed.

To copy column settings from one folder to another, select *"Copy column settings"* and choose the corresponding folder.
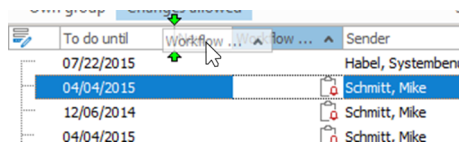
Click on the column heading to sort the entries in ascending or descending order based on this criterion. The arrow in the column heading shows you the sorting direction. Click on the column while holding down the *[Shift]* key to perform additional, subordinate sorting according to other criteria. The settings will be retained after you exit the program. The columns themselves can be moved to any place using drag & drop (click on the column while holding down the mouse button and move it).

Fig. 27: Hitlist

Compared to the retrieval, the post basket has a range of additional database fields which are used in relation to deadlines, traceability and structuring.

"Additional information" contains the messages that were provided when the post basket entry was created and shows the *"task"* for the post basket recipient. The *"Status"* shows with colored marks how well the specified deadline is being observed:

Procedures that have been assigned a *"reminder date"* are hidden in the incoming mail and reappear when the reminder time is reached. If entries with a reminder date and notes are shown, the *"Notes"* and *"Reminder date"* fields are displayed in the hitlist. Under Notes, you will see information that you entered when setting the reminder date. Alternatively, you can enter a note by clicking directly in this field in the hitlist. This Notes field also appears in the information mask, if this is activated. Other additional database fields that do not appear in the retrieval or the capture program are *"Sender"* and *"Recipient"*. These describe the person who created the entry for this post basket and the person who received the entry.

> ⓘ *You can select multiple post basket entries by clicking on individual entries while holding down the [Ctrl] key. Or you can select an area by firstly selecting an entry then marking the area by holding down the [Shift] key.*

Context menu in the hitlist

> ⓘ *The captions and the underlying actions vary according to company/document type.*

- Action
  - Invoice correct (⮡ *"Action" on page 9*)
  - Invoice incorrect (⮡ *"Action" on page 9*)
  - Respond (⮡ *"Action" on page 9*)
  - Forward (⮡ *"Action" on page 9*)
  - New entry (⮡ *"Action" on page 9*)
  - Reminder (⮡ *"Action" on page 9*)
  - Delete (⮡ *"Action" on page 9*)
  - Permanently delete (⮡ *"Action" on page 9*)
  - Restore (⮡ *"Action" on page 9*)
  - Refresh (⮡ *"Action" on page 9*)
- Status
  - Mark as unread (⮡ *"Status" on page 8*)
  - Mark entries as done (⮡ *"Status" on page 8*)
  - Mark entries as unfinished (⮡ *"Status" on page 8*)
- Complete procedure
- Copy cell value to cache
- Search by ...

plus the additional function *"Scripts"* if *"textvar object does not exist SCRIPT for post basket"* is used.

Complete procedure

"Complete procedure" means that all the document's movements for this entry are shown in a tree view. These include, for example, forwarding, new entries, queries, releases etc. that are performed in relation to this document (via various post baskets).

| | Schmitt, Mike | Please Check | 04/04/2015 | 🕐 |
| | Schmitt, Mike | Please Check | 04/04/2015 | 🕐 |

Fig. 28: "Complete procedure"

Click *[+]*/*[-]* to show or hide the tree. New entries can be found on the same level, and forwarding operations are shown as indented.

Search by ...

The *"Search via ..."* command is only active for fields for which there is a link to an external program (in this case: document number). If you select the command *"Search via document number"*, the document number of the marked entry is transferred to the search in order to perform a retrieval using this document number (Document number field is filled with the value in the retrieval mask and the search is started).

2.8 Information and editing mask

2.9 Document view

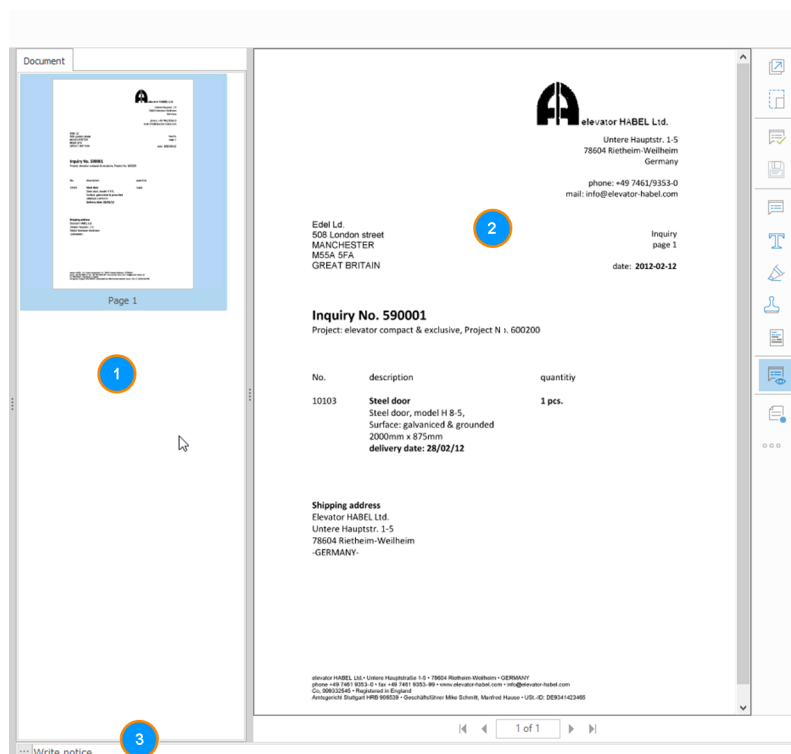*Fig. 29: Document view*

1   Preview window
2   Document view
3   Note field

The document preview is automatically updated when a document is selected.

You can add notes to the current document by using the note field in the document preview.

> The original document is not changed, but remains in its original state in the archive (only once). The added notes etc. are stored separated in the database in combination with the document.

Zoom within the document view

Fig. 30: Document view area

To do this, hold down the left mouse button and drag a frame around the area that you would like to see enlarged.

This area will be enlarged to fill the whole preview window.

Double-click in the document view to restore the document to its normal size.

Fig. 31: Zoom within the document view

Use the zoom function to display parts of the document in more detail.

Zoom in/zoom out

Document is enlarged or reduced in the document preview.
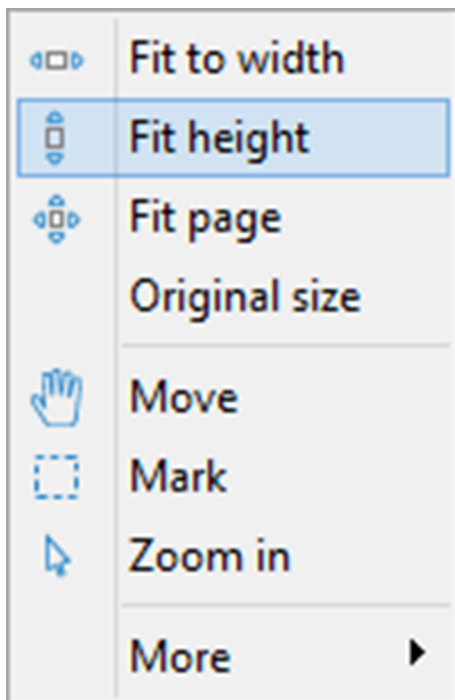
Rotate

Document is rotated.

Fig. 32: More

Fit width	Document is adjusted to fit the maximum width of the document preview.
Fit height	Document is adjusted to fit the maximum height of the document preview.
Fit to page	The display of the document is expanded to fit the whole page of the preview.
Original size	The document is displayed in the preview in its original size.
Move	With this function, you can move the document upwards or downwards in the display if the document is bigger than the screen size. Click in the document and move the cursor up or down while holding down the mouse button.
Mark	There are two different functions: ■ You can add a border around text by clicking *"Mark"*. As soon as the left mouse button is released, the text content is already copied into the clipboard! ■ If this is subsequently copied with *[Ctrl] + [C]*, an image section is copied from the marked area to the clipboard.
Zoom in	You can enlarge areas in the document view using the cursor. To do this, hold down the mouse button and drag a frame around the area to be enlarged. When you release the mouse button, this area will be shown enlarged.
"More ➔ Brighter"	For documents for which a form is stored, you can set a brighter view for the form.
"More ➔ Darker"	For documents for which a form is stored, you can set a darker view for the form.
"More ➔ Show inverse"	Black and white document sections are shown inverse.
"More ➔ Copy"	"Copying" of text passages for use in other applications. Graphic elements and text can be marked and copied to the clipboard using *[Ctrl] + [C]*. (Only for documents that were read with textvar object does not exist FULLTEXT).

2.9.1 Command bar — Document preview

Undock

By using the *[Undock]* button, you can release the document pre-view and document view from the window and move them into a separate window.

Fig. 33: Undock

Separate window

With the *[Separate window]* button, the document view is released from the display as a separate window.

Fig. 34: Separate window

Annotation

	"Annotation ➔ Dock on/off"	You can separate the document view from the hitlist, e.g. to display it on a different screen. One click on *"Dock on"* will save the most recent position of the docked on display, so that this will be correctly placed when there is another docking on process.
	"Annotation ➔ Separate window"	You can show the view of the information only in a separate window, e.g. to compare this information with another information, which can later finally be selected from the hitlist. You can open as many information screens as you wish in their own windows.
	"Annotation ➔ Active"	To change annotations on the document, first start the editing mode by clicking the symbol (active). A red frame then appears around the document. The active mode for the document can also be activated by *"Right-click ➔ Edit"* . You can now change annotations provided that you have the corresponding rights. During deactivation, you will be asked whether you would like to save the edits you made.
	"Annotation ➔ Save"	All annotations that are added to the document must be saved. If you do not save them, a confirmation prompt appears.
	"Annotation ➔ Note"	After clicking the symbol, you can add notes. To do this, hold down the mouse button and drag a frame on the document. The note is preallocated with your name and the capture date and ready to capture the information.
	"Annotation ➔ Text"	If you only want to add text passages to the document, you can create free text with this function.
	"Annotation ➔ Highlighter"	To highlight passages, hold down the mouse button and drag a frame over the required areas. The default highlighter color is yellow, but you can customize this in the context menu. **Highlighting in the context menu**: Foreground color changes the font color, background color changes the fill color.

Fig. 35: Annotations

"Annotation ➔ *Stamp"*	Use this symbol to add stamps. You can define in advance which stamps are stored. The individual stamps can be accessed via the menu. To add the stamp, select the required stamp and drag it to the correct position and size on the document while holding down the mouse button.
"Annotation ➔ *Redaction"*	To mask particular areas, use this symbol for the redaction function. To do this, hold down the left mouse button and drag a frame around the area that you would like to mask. You can set the color of your choice.
"Annotation ➔ *Hide"*	You can hide all of the comments for the document, such as notes, highlights and stamps, in the entire document.
"Annotation ➔ *Show versions"*	Shows the versions of the annotations.
"Annotation ➔ *More* ➔ *Reload"*	The command *"Reload"* restores the most recently added annotation if it was deleted (provided that you have not saved in the meantime).
"Annotation ➔ *More* ➔ *Pagesettings"*	Here you can adjust settings for the pages.
"Annotation ➔ *More* ➔ *Overview"*	The command *"Show versions"* is only active when a document has annotations with different versions. Click on the relevant version information. The annotation is then displayed on the document in the way that it was added at the time in question.

Note

By using the *[Note]* button, you can display or hide the *"Annotations"* tab.

All notes added to the document are shown in the *"Annotations"* tab.
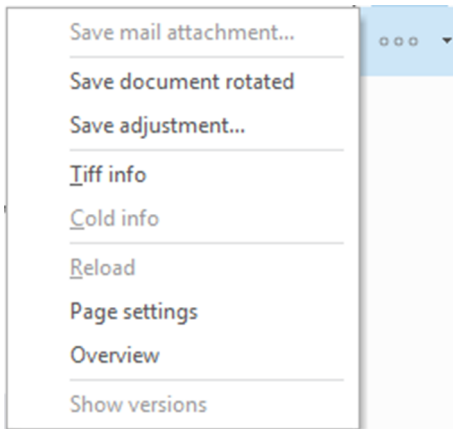
Fig. 36: Note

More

Fig. 37: Document Information More

"More ➜ Change info"	Here you can change the contents of the *"Information"* column from the hitlist.
"More ➜ Save attachments..."	The attachments are saved.
"More ➜ Save document rotated"	Rotated procedures can be saved in this state.
"More ➜ Save adjustment..."	Adjustments can be saved. You can also save on a document-dependent basis. After saving, the following prompt appears: This setting can be undone with the *[Delete]* button.
"More ➜ Go to next hit"	The next hit is shown.
"More ➜ Go to previous hit"	The previous hit is shown.
"More ➜ TIFF info"	Opens the information for the TIFF file ⮑ *"TIFF info and Cold info" on page 34*.
"More ➜ Cold information"	Opens the information for the text files ⮑ *"TIFF info and Cold info" on page 34*.
"More ➜ Reload"	Updates the display and the hitlist.
"More ➜ Page setting"	If there is an entry in the global settings, which states that comments must "ALWAYS" be printed, you can temporarily switch on/off one or more comments for the subsequent print action here.
"More ➜ Overview"	If comments such as text or notes have been saved, you can view all comments in a table here.
"More ➜ Show versions"	If several consecutive comments are applied to a document, this action will allow you to view every version of the document with its respective comments via this action. This is a sort of version history of the comments.

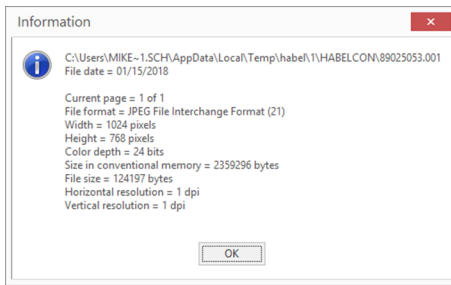**TIFF info and Cold info**   **Example (based on TIFF info):**

Fig. 38: TIFF info
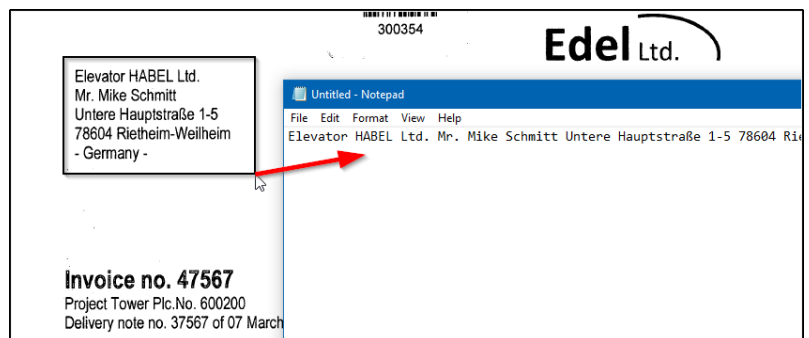
2.9.2 Highlight and copy document content

Fig. 39: Copy document contents

For documents that were read with *"textvar object does not exist FULLTEXT"*, you can copy text from the document. To do this, click the *"highlighter tool"* in the ribbon.

As with the zoom function, you can drag a frame on the document. Make sure that the text to be copied is inside the frame.

If you copy the marked section using *[Copy]* or *[CTRL] + [C]*, you can view the section as an image on the clipboard. This image can then be inserted into any other application, such as an e-mail, an ERP system or a financial accounting system. This function is available in both the document view and the hitlist if the document preview is activated.

2.10 Group post baskets

A group post basket is often used for teams, who are assigned their respective procedures for processing from the group post basket, or collect their procedures themselves. To convey a message and/or entry in a group post basket, select the required group post basket when you *"create"* it. To open a group post basket, select the group (e.g. Development) in the *"Users"* selection box and you will see the content of the group post basket. You can also change to the group post basket using the relevant symbol.

The *"Members"* folder shows who is a member of this group. You may also have access to group post baskets if you are not a member. However, if you are to receive entries from group post baskets of which you are not a member, this can only be done by selecting *"Forward"* / *"New entry"* in the menu. Otherwise, the entries in the group post basket can be conveniently moved to the members using drag & drop. This movement is the equivalent of forwarding. The entry disappears from the group post basket and is available for processing in the recipient's post basket. You can trace where the entry in the group post basket originated by viewing the tree structure.

3 Create post basket entry

3.1 General

You have several options to provide *"processes"* to a user in his or her mailbox:

■ Select the post basket recipient in the capture programs.
■ Create a new post basket entry from the retrieval.
■ Predefined workflow with specific rules.
■ A multitude of special variants, such as the start of a workflow, when database field contents change. Please speak to your customer support agent about this.

We will discuss these options in more detail below.

3.2 Select the post basket recipient in the capture programs

Fig. 40: Post basket recipient during capture

You can manually select the post basket recipient within the capture program. A number of database fields are available for this:

1 PB recipient 1 and PB recipient 2
2 PB deadline 1 and PB deadline 2
3 PB message 1 and PB message 2

Caption	Description
PB recipient 1 and PB recipient 2	Based on the name or parts of a name that you enter here, the recipient is accessed directly. If there are multiple results, these are offered for acceptance in a selection box. You can also enter groups as recipients.
PB deadline 1 and PB deadline 2	You can specify a processing deadline for the recipient here. If you do not enter anything, the procedure is considered to have no deadline.
PB message 1 and PB message 2	These fields can be used to provide the recipient with brief information. In most cases. you will also be offered a selection box here with frequently used information.

Once the capture procedure is finished and transfer to the archive has taken place, the entry appears in the post basket of the selected recipient or group. The procedure itself is already archived at this point.

3.3 Create a new post basket entry from the retrieval

If you have already archived documents, you can forward them to textvar object does not exist users for information or processing. To do this, use the post basket function. All the actions performed with the document will then be logged so that you can call up the history very easily later.

Retrieve the procedure in the usual way in the retrieval. Right-click on the hit. Select the command *"Create post basket entry"* in the context menu.
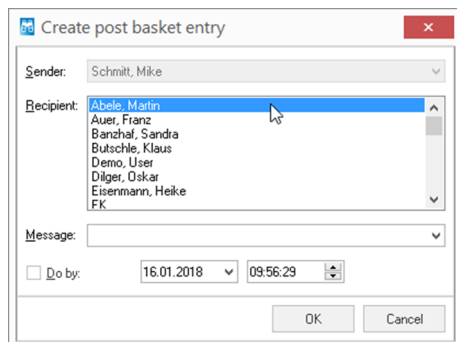
A dialog box appears. Select the *"Recipient"* here. You can also specify a *"message"* and a *"deadline"*. Confirm with *[OK]*.

The procedure is available immediately after this in the post basket of the selected recipient or group. If you hold down the *[Ctrl]* key while selecting the recipient, you can select multiple recipients at the same time.

Fig. 41: Create post basket entry

3.4 Post basket entries in the retrieval

3.4.1 Display of post basket entries in the retrieval

All procedures that are also present as post basket entries are marked in color in the retrieval. If you hover the cursor over an entry, you will see in which post basket the entry has not been actioned.

You can run a targeted search for post basket entries. To do this, activate the corresponding symbol in the menu bar in the *"Search"*.

Fig. 42: Post basket entries in the retrieval

3.4.2 Display of the post basket history in the retrieval

In the retrieval, you can view the processing path taken by the document with the aid of the *"Post basket history"*.

1. ▷ To do this, right-click on the hitlist entry.

⇨ The context menu opens.

Fig. 43: Show post basket history

2. ▶ In the menu, select *"Show post basket history"*.

⇨ You will see an overview of all forwarding operations, new entries, responses, payment releases and actioned stamps.
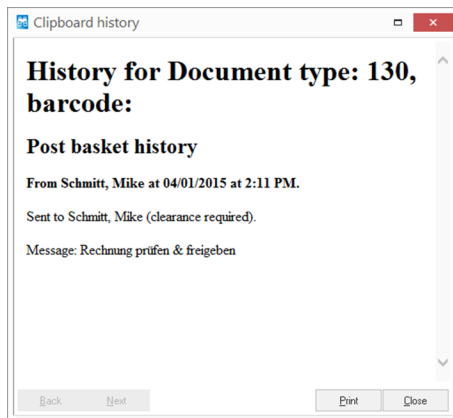
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