



■ **Archive.One**

Documentation

Vers. 004.04x. xxx

December 2020

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General information

Novaline archiving can be divided into two large areas. There are *document archiving* and *data archiving*.

Document archiving creates a screenshot (→) of the generated document. Unlike a conventional screenshot, the entire voucher is created as a photo. **This is** independent of its size. You can submit entire documentations with several pages to the archive. The original state of the document is preserved. The archived documents are stored in the *Novaline* - database on the SQL server. In addition to the archived document, categorisation information is stored in the database (metadata). This is e.g. document category and type, document date, address name, address number, etc. The Novaline database is created during the installation of Novaline Archiving.

Data archiving was developed to store evaluable figures, e.g. for controlling tasks. It also fulfils the requirements of the GDPdU (principles of data access and verifiability of digital documents) according to §§ 146 and 147 of the o(AO). Data archiving is integrated in such a way that tax-relevant data is made available for data carrier transfer and offers you a simple way of archiving the database(s) with the associated programme status for indirect and direct database access on CD. Likewise, all structural information necessary for evaluating the data, such as format templates, file structure, field definitions and links, are transferred to a data carrier in machine-readable form.



Novaline data and document archiving provides both archives side by side.

How to handle this documentation

The symbol  is used for notes. Here you will find particularly important additional information on the topic described.

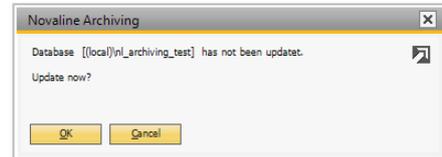
Tips and tricks are marked with the  symbol. This information simplifies working with the programme.

In the appendix you will find the glossary. Technical terms are translated here. Within the documentation, the arrow in brackets (→) refers to the glossary.

Licensing of Novaline archiving

Start Novaline Archiving of the programme group Novaline *Software, Novaline Archiving; Administration*.

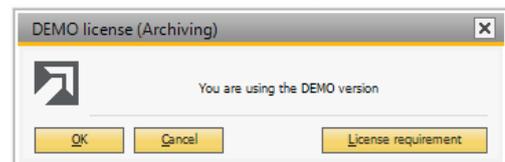
The archiving is opened. A message appears stating that the database is not up to date. Confirm the message with **OK** 



Then confirm the login dialogue with the user name *Administrator*, the password remains blank.

In the *DEMO licence* dialogue confirm the *licence request* button.

In the following dialogue box *Licence request (archiving)*, select the button *Open licence file* and read in your valid licence key. If you do not have a valid licence key, please request one from Novaline Informationstechnologie GmbH by telephone on +49 (0) 5971 868-0 or electronically at vertrieb@novaline.de.



Launch Novaline Archiving for the first time

Before you can archive, the following basic settings must be made.

Basically, you have two options to start Novaline Archiving. You can select it as a stand-alone application from the programme group or you can start it effortlessly from your SAP Business One® application.

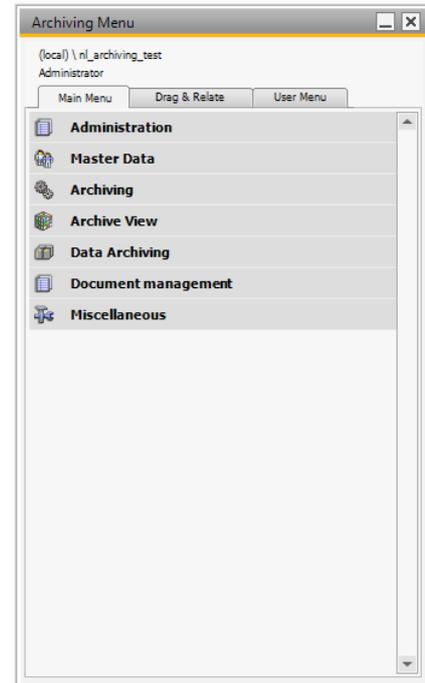


To be able to use archiving without problems, at least .NET 2.0 Service Pack 2 must be installed on your system.

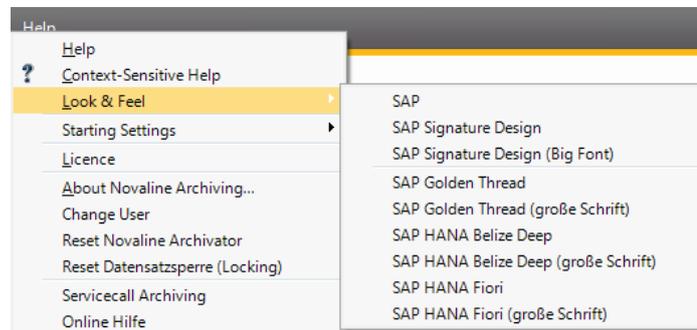
Start as a stand-alone application :

Select of the programme group *Novaline Software, Novaline Archiving, Administration.*

Archiving is started. The archiving menu is displayed.



The design style via *Help > Design Style* is optionally selectable.



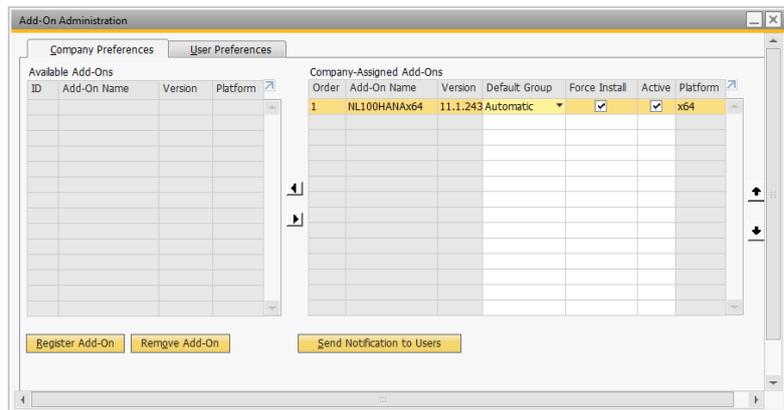
Chapter 1 Document archiving

Document archiving is integrated in SAP Business One ® (BO). Once you have installed Novaline Archiving and registered it in SAP Business One ® , it is available for you within the SAP Business One® application. From the SAP areas that contain unique data, such as the address number and the document type, you can "print" the generated document directly into the archive via the printer selection (quotation, order, purchase order management ...). Automatic keywording and storage directly to the address (customer, supplier) takes place. The supplied "Novaline Archivator" printer driver is required for this.

1.1 Registration

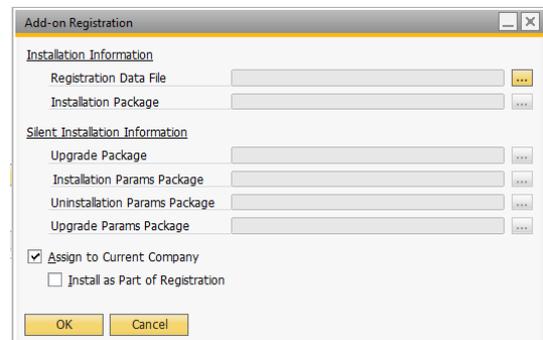
After the installation SAP Business One must be started, which must be carried out at each workstation. The login is done as "manager".

Switch to the menu item *Administration, Add-ons, Add-on Administration*. Press the *Register Add-on* button on the  left-hand side of the screen.



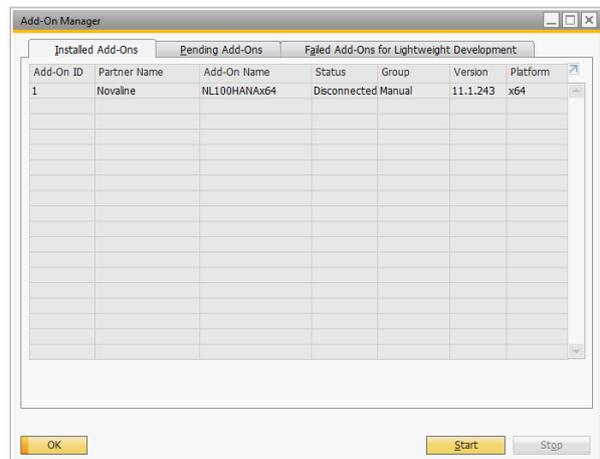
In the following dialogue *Add-on registration* select the registration file and the installation package from your programme directory: e.g. C:\Program Files (x86)\Novaline\Novaline Archiving \AddOn9.3 for SBO (version 9.3).

Use the button  to change the file directory of your computer.



Then activate the checkbox *Install as part of the registration*. Then confirm it with the *OK* - button. The add-on is installed. There will be a return to the previous menu. The new add-on is now displayed in the right-hand window area. Confirm the dialogue with *OK*.

After successful installation, switch to the menu item *Administration, Add-ons, Add-on Manager*. Select the Novaline add-on with a mouse click and confirm your selection with *Start* .



Exit the dialogue with *OK* .

The *Exit* button  disconnects the connection to Novaline Archiving.

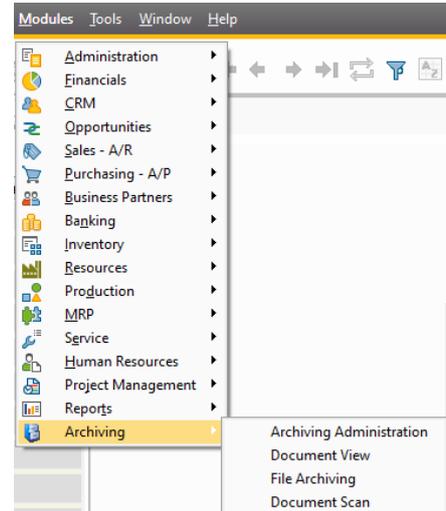
If you want to achieve a permanent connection to Novaline Archiving, i.e. the add-on should be started every time SAP Business One® is started, change the display of the default group in the *Add on Administration* default setting from *Manual* to *Automatic*.

Order	Add-On Name	Version	Default Group	Force Install	Active	Platform
1	NL100HANAx64	11.1.243	Manual	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	x64
			Manual			
			Automatic			
			Mandatory			
			Disabled			

1.2 Basic setting / Administration

Before using Novaline Archiving for the first time the standard settings must be checked. If Novaline Archiving is installed in a network, the settings for the database must be defined once by the administrator. Settings related to working with the archiving, for example language selection, printer assignment to a document type, max. length of a keyword, etc., must be carried out at the respective workstation.

Go to the settings via the SAP Business One® menu *Modules, Archiving, Document Management*. Or select the add-on *Archiving, Document Management* from the main menu.

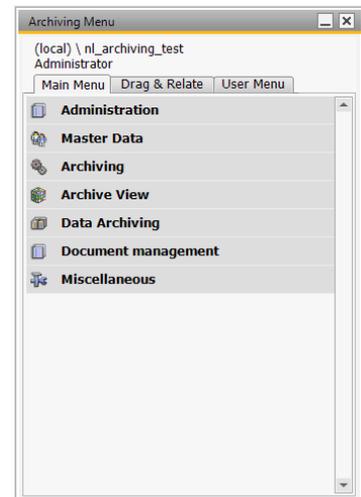


The Novaline Archiving module opens.

You can choose here between

-  Administration
-  Master data
-  Archiving
-  Archive view
-  Data archiving
-  Document management
-  Other

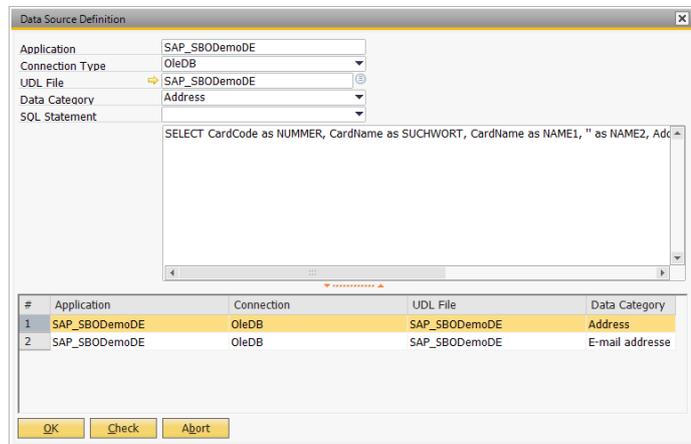
By left-clicking on the respective area, the selection list is opened and you can choose between the different commands. A click on the corresponding command branches into the dialogue.



1.2.1 Data source definition

Before you can use Novaline Archiving, a connection to the SAP Business One® database must be established. This allows you to access the entire address and article master. The archived documents are filed directly to the address or article.

A separate data source definition must be created for each data type (address/article) and for each client. Likewise, a separate data source definition must be created per mailbox (client) for e-mail archiving.

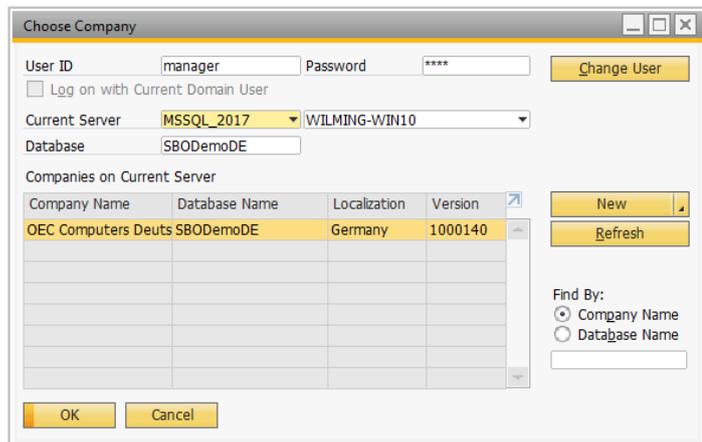


Select the command *Data Source Definition* from the menu *Modules, Administration*. Or select *Administration, Data Source Definition* from the main menu. The *Data Source Definition* dialogue opens.



When the archive system is set up, the "*.udlx" files are saved in a table for the data source definitions. When archiving is started at the workstations, the "*.udlx" files are automatically created.

In the first field *Application* enter the database name of your SAP Business One® application. The database name is displayed in Business One: *Administration, Select Company*.

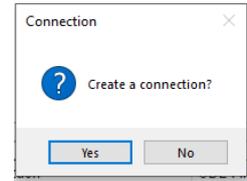


The value SAP_ is to **be** entered as the prefix (->). In our example, the database is **SBODEMODE**. The name to be entered under *Application* is therefore **SAP_SBODemoDE**.

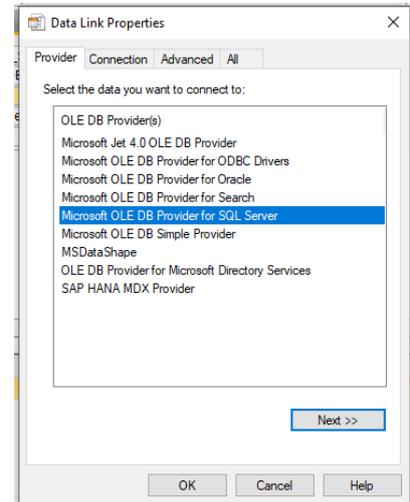
When you have inserted the name, mark it with the mouse and copy it to the clipboard (CTRL+C).

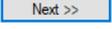
Now insert the name in the second field UDL name again (CTRL+V).

⇒ An arrow appears next to the value. Click on this with the mouse to establish the connection to the SQL server. Confirm the dialogue whether a connection to the SQL server should be established with YES  .



The data link properties open. Switch to the *Provider* tab and select the provider *Microsoft OLE DB Provider for SQL Server*.



Then click on the button (→) *Next*  .

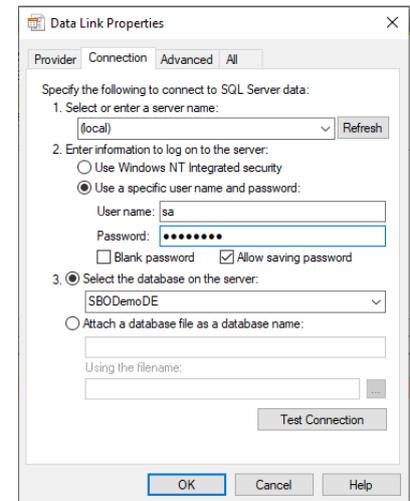
On the *Connection* tab, select under

1. Select your SQL server or the valid instance of the SQL server from the list box (→) . To do this, click on the arrow  . If no servers are displayed, click the *Refresh* button  and try again.

Under 2. enter the information to log in to the server and allow the password to be saved.

Select your desired SAP database from the list box under 3.

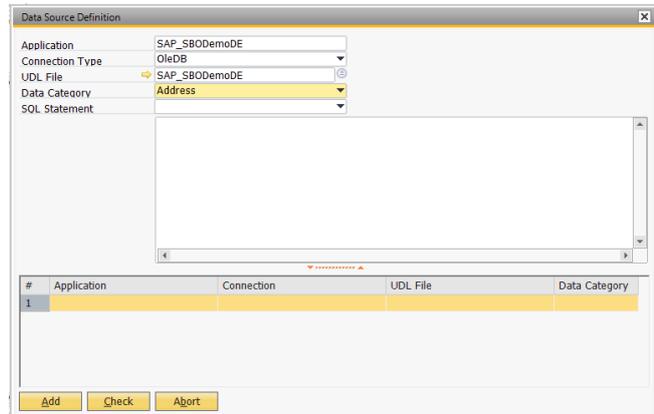
Once you have made all the entries, check everything by pressing  the *Test Connection* button. If the test was successful, confirm this dialogue with *OK*  .



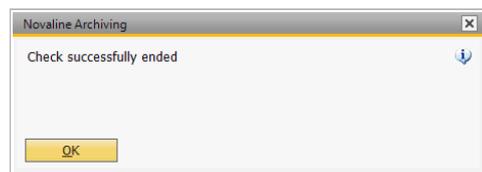
There is an automatic return to the data source definition.

Archive to address:

In the Data Type field, select the *Address data* type from the list box. In the SQL select statement field, select the SQL script *SAPB1 -Business Partner from the* list box to connect the data from the SAP database with the fields of the Novaline database. The SQL statement is automatically generated in the lower field.



Once you have entered all the information, click on the *Test* **Check** button. If the test is OK, the dialogue "*The test was completed successfully*" appears.



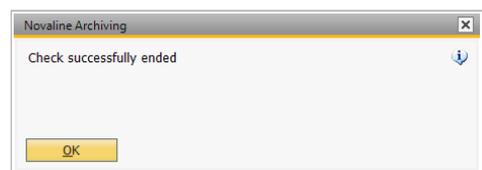
Confirm this dialogue with *OK* **OK**. The system automatically returns to the previous menu. Confirm **Add** your entries with the *Add* button.

If the test was not completed successfully, please check your entries. If necessary, make changes and test again. If the test is still not successful, please contact your administrator.

Archive to the article:

In the Data Type field, select the *Article data* type from the list box. In the SQL select statement field, select the SQL script *SAPB1 -Article from the* list box to connect the data from the SAP database with the fields of the Novaline database. The SQL statement is automatically generated in the lower field.

Once you have made all the entries, click on the *Test* **Check** button. If the test is OK, the dialogue "*The test was completed successfully*" appears. Confirm this dialogue with *OK* **OK**. The system automatically returns to the previous menu. Confirm **Add** your entries with the *Add* button and exit the **OK** menu with *Cancel* and **Abort** *OK*.



If the test was not completed successfully, please check your entries. If necessary make changes and test again. If the test is still not successful, please contact your administrator.



Please pay attention to upper and lower case when entering the database name

1.2.2 Data source definition HANA

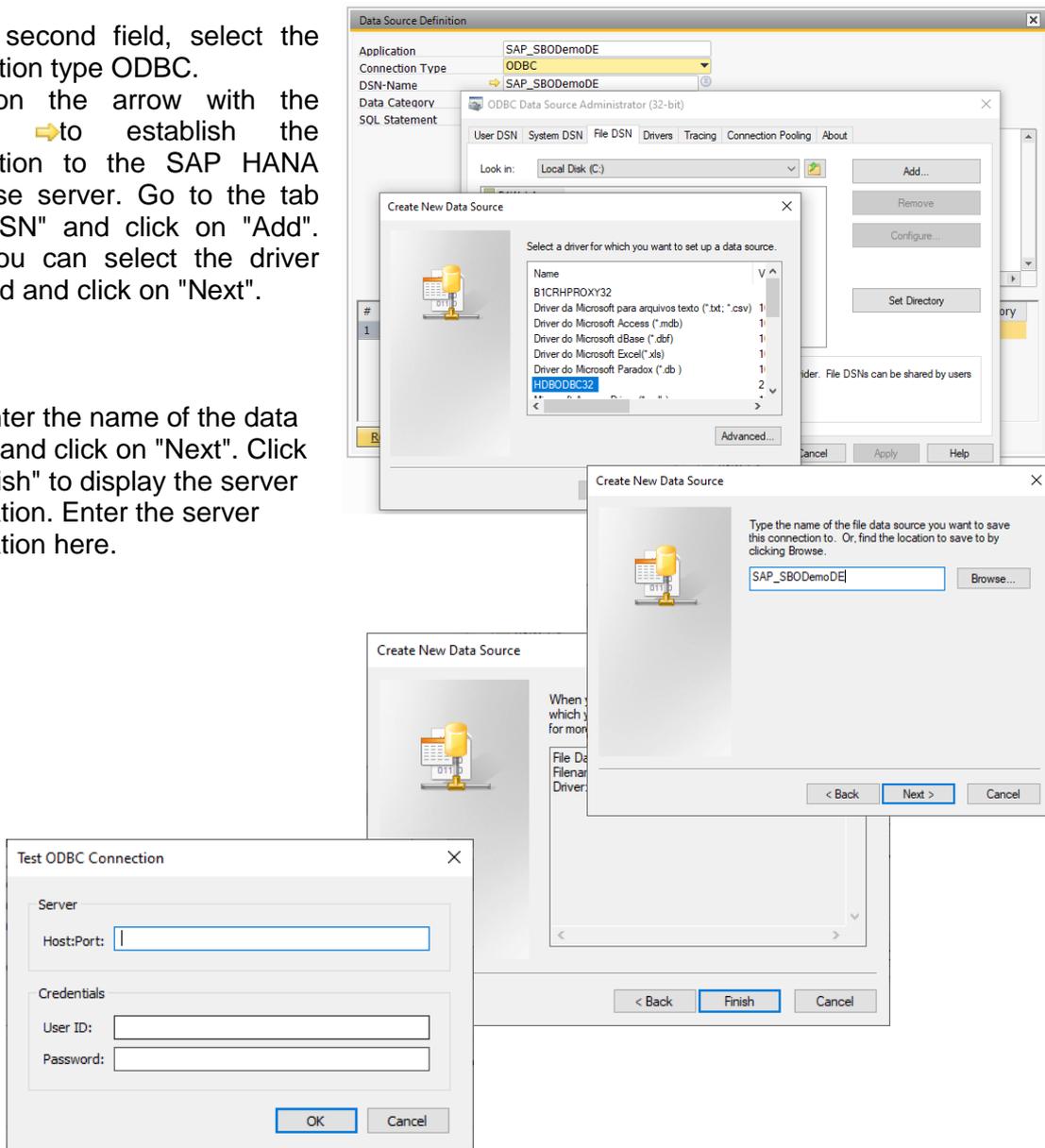
Before you can use Novaline Archiving, a connection to the SAP Business One® HANA database must be established. This allows you to access the entire address and article master. The archived documents are then filed directly to the address or article.

A separate data source definition must be created for each data type (address/article) and for each client. Likewise, a separate data source definition must be created per mailbox (client) for e-mail archiving.

In the first field *Application* enter the database name of your SAP Business One® application. The database name is displayed in Business One: *Administration, Select Company*. Enter **the** value SAP_ as the prefix (->). In our example, the database is **SBODEMODE**. The name to be entered under *Application* is therefore **SAP_SBODEMODE**.

In the second field, select the connection type ODBC. Click on the arrow with the mouse → to establish the connection to the SAP HANA database server. Go to the tab "File DSN" and click on "Add". Now you can select the driver provided and click on "Next".

Now enter the name of the data source and click on "Next". Click on "Finish" to display the server information. Enter the server information here.



Now click on the selection of DSN addresses. Click on "Select" to enter the DSN name in the data source definitions. Depending on the data type, please select the SQL select statement and add the data sources by clicking on "Add".

Data Source Definition

Application: SAP_SBODEMODE
 Connection Type: ODBC
 DSN-Name: SAP_SBODEMODE
 Data Category: Address
 SQL Statement: SAP-B1 HANA business partners

Sage Classic Line
 Novaline debtors and creditors (S...rdName" AS "SUCHWO
 Novaline Bautec.ONE business par
 SAP B1 employee
 SAP-B1 HANA business partners
 SAP-B1 HANA business partners w
 SAP-B1 HANA employee
 Novaline Workflow Business Partn

DSN-Selection

DSN-Files found

DSN-Name	DSN-Path
SAP_SBODEMODE_64	C:\Users\Wilming\AppData\Roaming\Novaline
SAP_SBODEMODE	C:\Users\Wilming\AppData\Roaming\Novaline

```
[ODBC]
DRIVER=HDBODBC32
SERVERNODE=(hana-93-dev:39015)
UID=****
PWD=****
CS=SBODEMODE
```

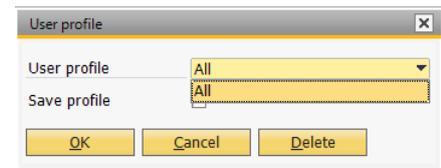
Select Abort Save

1.2.3 General settings

The general settings for archiving are stored within the administration. When you open the *General Settings*, the corresponding dialogue is displayed. The individual commands are divided into different tabs.



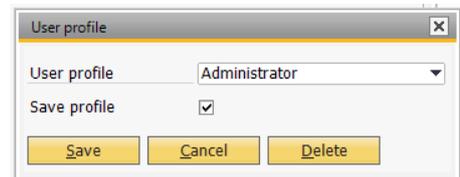
On each index card you have the option of adopting an - existing profile. To do this, click on the button *User profile*  and select an entry from the list.



Only the administrator is allowed to add new profiles. The administrator receives  the dialogue by clicking on the button *User profile*.

For a new profile choose the desired settings on each tab. Then click on the *User Profile* button and enter the desired profile name in the *User Profile* field.

Activate the checkbox *Save profile* and press the button *Save*. The profile is now saved and can be selected for other users.

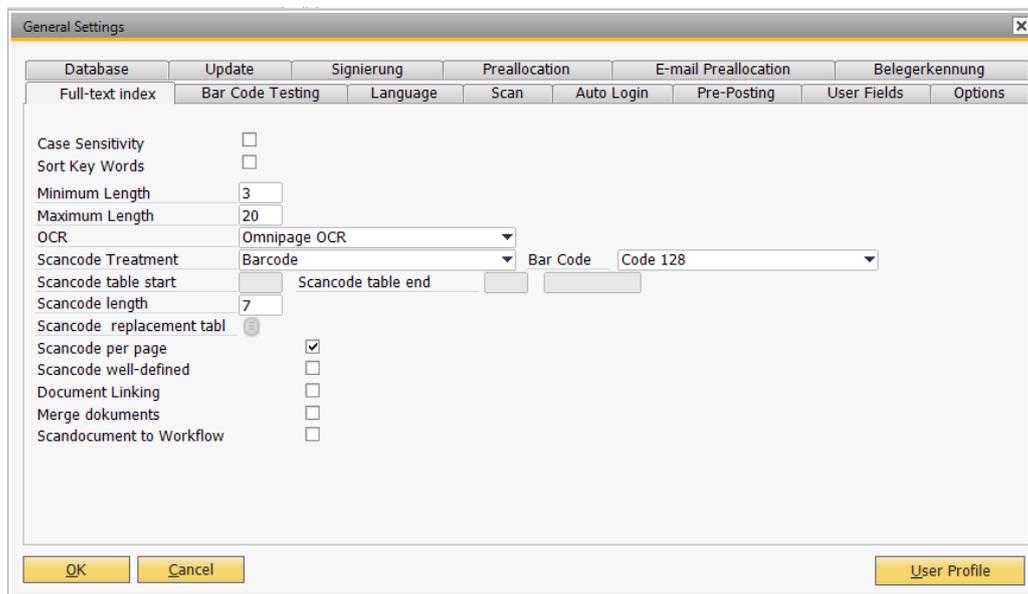


If you define the profile with the name **Default**, the settings from this profile are automatically assigned to every new user who has not selected a profile of their own. The settings of the following tabs are adopted:

- Full-text keywords
- Language
- Documentscan, incl. scan directory
If this is a local directory, it must be set up on each workstation.
- Database
- Update
- Signing

1.2.3.1 Full text Keywords

On the index card *Full Text Keywords* you will find:



- **Upper/lower case:** This activates upper and lower case during document scanning or document archiving in full text recognition. The distinction between upper and lower case is then available in the search.
- **Sorting full text:** The recognised characters in the full text recognition are automatically sorted if this option is activated.
- The **minimum length of** a keyword: If you enter the minimum length of 5 characters, the words 'the', 'that', 'and', 'or', 'warm', 'house', etc., for example, will not be keyworded.
- The **maximum length of** a keyword: For example, if you deposit a maximum length of 30 characters, the words up to a word length of 30 characters will be included in the keywording. Words longer than 30 characters are **NOT** archived.
- **OCR (Optical Character Recognition).** If you want to work with text recognition in the document scan, select an available OCR. In addition to Microsoft Office OCR, you can also use Omnipage OCR (licensing required).

The prerequisite for using Microsoft Office OCR is an installation of Microsoft Office 2003 or 2007 with OCR. Barcode recognition is not possible with this, only alphanumeric strings can be used.

Office 2010 is not supported.

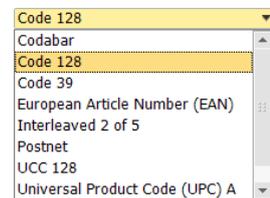
- **Scancode method:** Selection of the scancode method to be used
 - Scancode as text: Use of an alphanumeric string.
When selecting this OCR, a scancode scheme **must be** specified (see below).
 - Barcode: Use of a barcode (only with Omnipage OCR, license required).



When using Microsoft OCR with the Novaline Scancode, please follow the recommended procedures for checking the automatic assignment!

For more information on working with the Novaline Scancode, see chapter [1.3.3.5 Scancode - Automatic scanning process](#)

If you choose barcode, you have the option here to choose between several barcode methods. Code 128 can display alphanumeric characters as a barcode.



The use of Code 39 is recommended for the [barcode check](#) (see below) or the "END" barcode. This can also be used to represent special characters.

- Scancode scheme start / end (when using "Scancode as text" see above)

In the fields start and end of the Scancode scheme you define the desired character string for delimiting your personal scancode. Since an alphanumeric character string, as used here for the scancode, may already occur elsewhere in the document, a delimitation is necessary for recognition as a Novaline scancode.

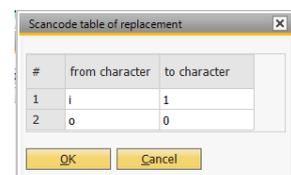
The scheme consists of two characters at the beginning and two characters at the end of each code.

Please note that these values must be unique so that they can be scanned and assigned correctly. (Scancode scheme start ##, plus a freely selectable character string as scancode (4711), plus scancode scheme end ##. Result is "##4711##" or scancode scheme beginning [[, plus a freely selectable character string (4711), plus scancode scheme end]]. Result is "[[4711]]". Labels must be created with the scancode in this form: 4711 is always recognised as the Novaline scancode in this example.

- Scancode length: Number of characters of the scancode.

The scan code length is used to optimise the recognition of the Novaline scan code and is limited to 99 characters. This provides further differentiation from other identical character strings that may already exist on the document.

- Scancode substitution table: In the event of incorrect recognition in the option "Scancode as text", such as an "i" in place of a "1" or an "o" in place of a "0", the correction of such errors can be entered with the table.



Enter the incorrectly recognised value under "from character"; under "by character" enter the value that the OCR should use instead. With "Add" a new line is generated; "Cancel" completes the adding, the dialogue can then be closed with "OK".

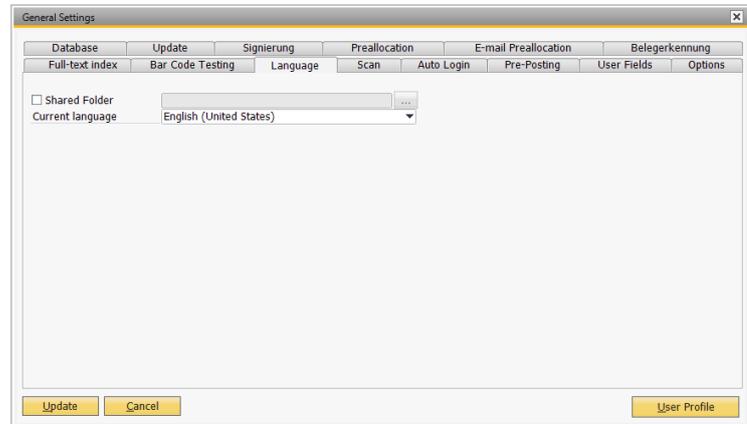
- Scancode per page: Only pages that have a scancode are treated as a scancode. Subsequent pages without a scancode are not assigned to this scancode.
 - Checkbox not set: if a page with a scancode is followed by pages without a scancode, these are assigned to the previous scancode until either a new scancode or the scancode "END" or "\$\$END\$\$" (when using barcodes) follows. This avoids multiple labelling of a process with several pages; only the first page needs to be provided with the scan code, the subsequent pages are automatically assigned to the scan code.

- Checkbox set: Each page that is to be recognised as a scancode must be provided with a scancode.
- **Scancode unique:** This option activates 2 functions in archiving:
 1. Scancodes from SAP are only accepted once! This option thus ensures the unique assignment of a Business One transaction to a scancode!
 If you have activated the option "Scancode unique", another checkbox "Deactivate additional scancode check" appears.
 This option deactivates the message when a B1 zusätzliche Scancodeprüfung im ERP deaktivieren document with an existing scan code is transferred. This is may be necessary, for example, if a quotation is saved with a scancode and then a delivery is created from it.
 By taking over from the pre-document, the scancode is also taken over and the added scancode is transferred to the archiving.
 Multiple use of a scan code in SAP is no longer possible.
 2. If a scan is made with a scan code that already exists, this scan is assigned to the existing one. This enables subsequent use for scanning with an existing scan code.
 Example: You receive a delivery note with several pages, some of which are still missing. You label the first of the existing pages with the scan code 12345, scan the pages; the scan code is assigned to the B1 transaction and archived. Later you receive the remaining pages: these are to be scanned and automatically assigned to the archived process: scan these pages with the scan code 12345! The archiving recognises that this scan code already belongs to an archived process and assigns all subsequent scans with this scan code to the process.
- ⚠ If the scan code of a second document/process is not recognised, all pages of the second document/process are assigned to the first scan code. We recommend using Omnipage Barcode OCR for optimal recognition of the scancode!
- **Document linking:** This option activates the button "Document linking" (see Chapter [1.5 "Document linking"](#)) in the dialogue boxes "Document scanning" and "Document archiving".
 With document linking, documents "to be archived" can be assigned to an already "archived" document irrespective of their keywording to address, document type or similar.
- **Linking suggestion:** With this option, documents that are to enter the archive via document scanning or document archiving are also linked to them at the same time.
- **Combine documents:** Combine several documents with the same scan code in the dialogue "Scancodes: Document without entry" dialogue (see [1.3.3.4 Scancode - Automatic scanning process](#))
 Scans with a scan code, if not yet archived, are displayed in the dialogue "Scancodes: Document without entry".
 Without the option "Rake documents", each scan is listed in a single line. With many scans this can quickly become confusing.
 With the option "gather documents", identical scancodes are combined in one line; the individual pages can be scrolled through in the large view on the right. Only single image formats (*.jpg, *.bmp, *.tif) can be gathered; no multipage Tiff files, no PDF!

1.2.3.2 Language

To use a shared language file in the network, activate the checkbox *Shared folder* and select the  corresponding directory from the file system via the button *Search folder*. Select the language in which you would like to work via the list box .

As soon as you restart the programme or change the user, it automatically switches to the language you have selected.



After making a change, press the *Update* button  and then *OK* .

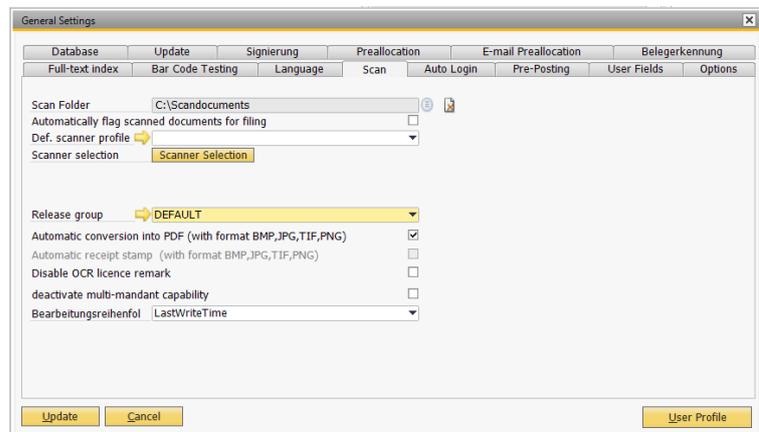


To use a common language directory, copy the file *myarchiving.de-DE.resources* from the programme directory, e.g. *C:\Programmes\NovalineNovaline Archiving\Texts* to the desired network directory.

1.2.3.3 Document scan

When working with the scan module, an individual **scan directory** can be defined.

To do this, click on the *Selection*  button. The Windows Explorer opens and the desired directory can be selected.



If a directory is not available, you can  define a new directory in Windows Explorer using the *Create New Folder* button.

All documents scanned via the scan module are temporarily stored and processed in this - scan directory entered here. In the document scan the documents will be saved in the database and it deletes the temporarily stored files.



If you define a directory on the server, it can also be used by other user who also store this directory in the settings.

If the checkbox - **Automatically mark scanned documents for filing** - is selected, all documents are automatically marked for filing directly when scanned.

 If you carry out batch processing when scanning, be sure to deactivate the checkbox *Automatically mark scanned documents for filing*. Otherwise all documents will be archived at the first selected address.

If a locally connected scanner is used the  desired **scanner** can be **selected** via the *Scanner selection* button.

The scan process calls up the scan dialogue depending on the installed TWAIN driver; you can then make the specifications for scanning such as resolution or colour depth per scan. Alternatively, it is possible to set up a default of the scanner settings as a "**scan profile**"; the scanner dialogue no longer appears and scanning takes place immediately. Depending on the scanner model or the TWAIN driver used, incompatible constellations may occur between the scanner and the Novaline scan dialogue; in this case it is not possible to use the profiles.

Different scan profiles can be used for the scanning process. The arrow button  opens the dialogue for the scan profile.

Enter the desired name in the *Profile name* field or select the desired profile of the drop-down list *Profile name selection*.

In the *Resolution (DPI)* field, select the desired resolution of the list box .



The image shows a dialog box titled "Scan Section" with the following fields and buttons:

- Profile label selection: Standard (dropdown menu)
- Profile label: Standard (text field)
- Resolution (DPI): 300 (dropdown menu)
- Color: Color (dropdown menu)
- Format: A4 (dropdown menu)
- X-Pos: 0 (text field)
- y-Pos: 0 (text field)
- Width: 2481 (text field)
- Height: 3507 (text field)
- Buttons: OK, Cancel, New

Select the desired colour in the *Colour* field.

In the *Format* field select a predefined format or *user-defined*. For the custom format enter the appropriate values in the lower fields (x-pos, y-pos, width and height).

Then click on the *Update* button  and confirm with *OK*

There is an automatic return to the previous menu. The command abort  the session and there is a return to the previous menu without changes.

If you want to remove an existing scan profile, select it from the drop-down list and press the *Delete*  button. The profile is deleted.

After making a change, press the *Update* button  and then the *OK*  button.

Release group

User permissions allow you to restrict the display of scan documents in the scan dialogue to certain users or defined groups.

This makes it possible, for example, that a user from the administration can scan and that these scans are only displayed to him or the members of the authorised group; a user from the sales department can scan for himself, but does not see the scans of the administration.

The release group "Default" is preset for unrestricted access of all users to all scans.

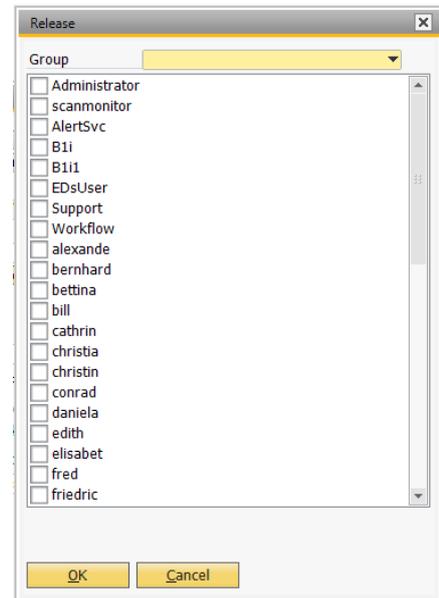
To set up your own sharing group, please click on the yellow arrow.

In the next dialogue all users in the archiving are displayed.

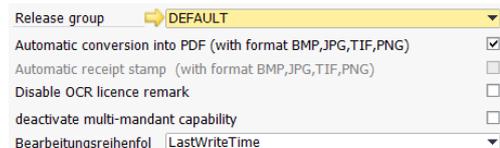
Select those to be added to a group and enter the name of the group in the "Save as Group" field.

If the group already exists, select the group above and add the associated users accordingly.

Exit the dialogue with "OK" and confirm the safety query that appears.



If the checkbox - **Automatic conversion to PDF** - is selected, the scanned documents (in BMP, JPG, TIF, PNG format) are automatically converted to PDF format.



If the checkbox - **automatic incoming stamp** - is selected, the incoming stamp is automatically set on the documents (in BMP, JPG, TIF, PNG format).

This option is only active if scanned documents are not to be automatically converted to PDF.

Processing sequence

Here you can choose between the processing sequence "LastWriteTime" or "Filename".

1. Editing "LastWriteTime"

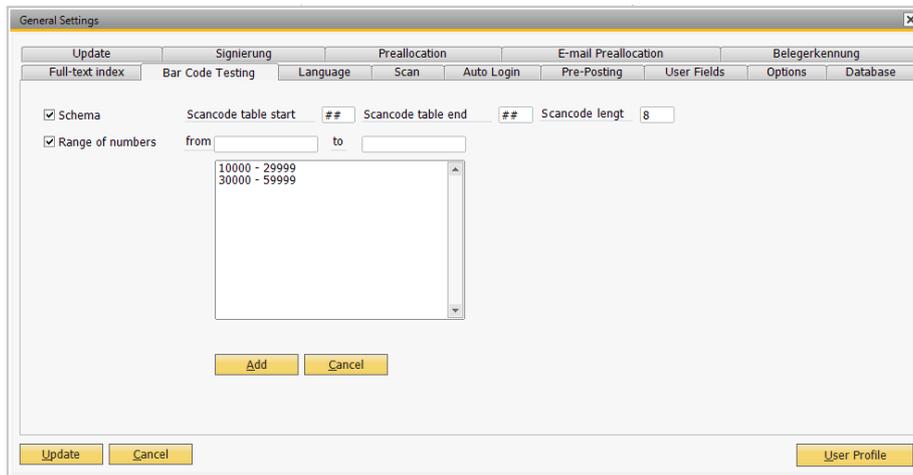
The scanned documents are processed here according to the time stamp "LastWriteTime".

2. Editing by "File name"

The scanned documents are processed here according to the file name "Filename".

1.2.3.4 Barcode check

To avoid false recognition of a barcode, a scheme (as with the scan code) can be checked. In addition, valid number ranges can be defined for an extended check of the barcode.



This can prevent other barcodes already present on the receipt from being incorrectly used as Novaline scancodes.

Scheme:

A scancode scheme and a scancode length can be entered for the barcode used analogous to the settings for the scancode as text (see above). The scancode length entered here is taken over in the field Scancode length under "Full text keywords" and vice versa.

During recognition, the OCR searches for the beginning or end of a barcode specified here in order to use it as a Novaline scancode. Other barcodes without this scheme are ignored.

Number range

In combination with the scheme or separately, the Novaline Scancode can be differentiated from existing barcodes via defined number ranges.

To add a number range, enter the start and end values in the corresponding fields and click on "Add".

To change a number range, click on it and change the respective values in the fields.

If you would like to delete it, click on the number range and delete the fields.

Also the Omnipage barcode test application "OmnipageBarcodeTest.exe" was added.

You will find this tool in the programme directory after installing the archiving.

You can drag and drop an image file into the left window or select it via the search dialogue.

Enter the code to be recognised on the right and click on "Process Image": The recognised barcode is displayed.

1.2.3.5 Automatic login

Automatic logon makes it easier to work from SAP Business One®. To ensure that you are NOT asked to identify yourself during the ongoing archiving from Business One, you can store your username and password here. Use the same designations here as for your Business One logon. Activate the checkbox for automatic login

Automatische Anmeldung verwenden

Activate the checkbox for complexity requirements:

If this policy has been enabled, passwords must meet the following minimum requirements:

- It must not contain either a part or the complete account name of the respective user.
- They must be at least six characters long.
- They must contain characters from three of the four following categories:
- Capital letters from A to Z
- Lower case letters from a to z
- Digits of base 10 (0 to 9)
- Non-alphanumeric characters (e.g. !, \$, #, %)

Compliance with the complexity requirements is enforced when passwords are created or changed

1.2.3.6 User fields

Up to 5 user defined fields can be created here via data type.

These fields are used for further categorisation.

In the *Data type* field, select the desired entry of the list.

The fields 1 to 5 are freely selectable. Use the checkbox to decide whether the field should be available during archiving and archive research.

A mouse click activates the checkbox.

A further mouse click deactivates it. Enter the desired designation in the *Designation* field.

You can use the *Selection* checkbox to store fixed selection lists that are then available during archiving.

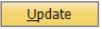
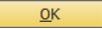
As soon as you activate the checkbox, you can branch to the entry of the selection texts via the arrow. You can add the desired texts via the *Add* button of the toolbar. Enter the value in the User field1 field and confirm your entry with *Add*  .

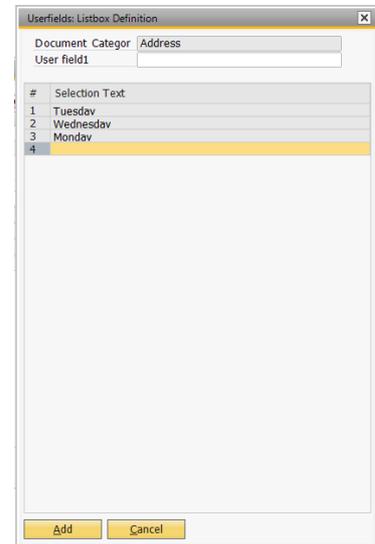
If you do not want to make any further entries, click on the *Cancel* button  and then on *OK*  .

If you want to change an existing entry, select the entry from the list.

The value is transferred to the edit field at the top. Make your changes here and confirm with *Update*  .

You can delete an entry via the *Delete* button of the toolbar. To do this, mark the entry to be deleted with the mouse and then press the *Delete*  button. The name is limited to 50 characters.

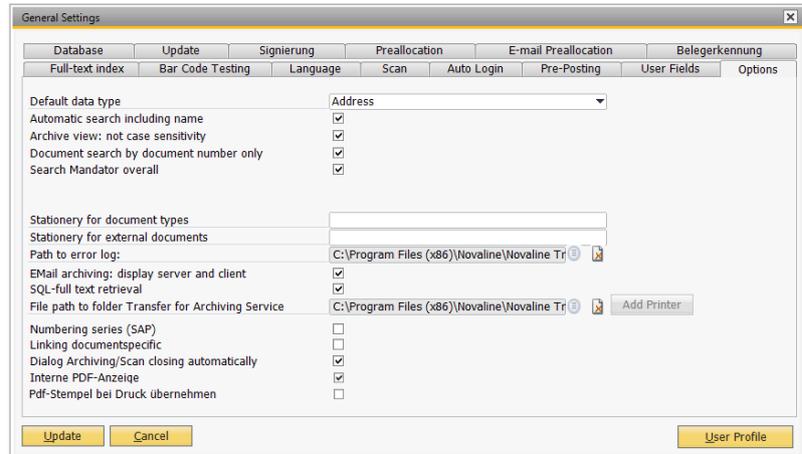
You will then return to the previous dialogue. Confirm your entries with *Update* and  *OK*  .



1.2.3.7 Options

Standard data type:

Set the "default" data type for your work with the archive here. You can change the data type for individual processing steps at any time in the archive dialogue boxes.



Automatic search incl. name:

The first checkbox toggles between searching only by address number and searching by address number plus address name. If the checkbox is activated, only the address name entered in the search field will be searched. Only those documents are displayed that have the identical address name in the index field. If the checkbox is deactivated, all entries are displayed that have the same address number as the address name searched for (change of company name).

Archive view: Note upper/lower case:

The second checkbox distinguishes between upper and lower case. If the checkbox is deactivated, upper and lower case won't be used for the display of documents.

Search document number directly:

Use the third checkbox to control the preselection of the archive. If this checkbox is activated, you will only receive the archive document that matches the document you have direct access to.

If the checkbox is deactivated, all documents for the address that were filed with the same document type are displayed (→Chapter [1.4 Archive - Document Search](#)).

Cross-client search:

If this checkbox is active, all existing address sources are addressed in the document search (archive view).

Stationery for document types:

Enter the name of the stationery you have stored in the PDF Mailer (-> [1.3.6 Stationery](#)). All documents archived from Business One are archived with this stationery.

Stationery for external documents:

Enter the name of the stationery you have stored in the PDF Mailer (-> [1.3.6 Stationery](#)). All documents archived from Windows programmes (such as Word, Excel, etc.) are archived with this stationery.

Path for error log:

Select the path for the error log here. Any errors that occur are logged here. The  entry can be removed again via the *delete* button.

Show e-mail archiving server and client:

If you activate the checkbox here, the server and client for e-mail archiving are displayed in the "Archiving" menu.

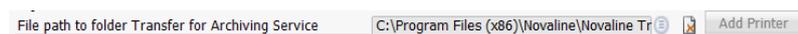
Activate SQL full text search:

This option is only available if the SQL server is configured accordingly. With the SQL full text search, fragments of a search term can also be used in archiving.

A distinction is made here between two search options:

- Fragment search:
Ex: Instead of "Mayer", you can also search for "ayer".
Result: The word "Mayer" is found and displayed.
- Full text search:
Ex: Instead of "Mayer", you can also search for "Maye".
Result: The word "Mayer" is found and displayed.

Transfer path for filing service:



In addition to using the "Novaline Archivator", it is also possible to install a second archive printer on the computer: "Novaline Service".

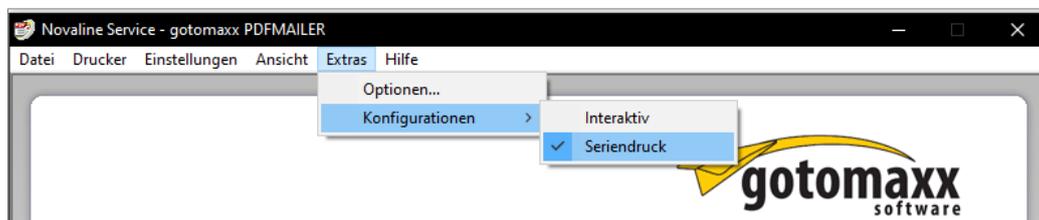
While the Novaline Archivator processes the archiving procedure on the workstation computer, this process is outsourced to a server while using the Novaline Service Printer. This noticeably speeds up the processing of printing and archiving a B1 document; only one resource-demanding printing process takes place.

The prerequisite for this is the installation of the Coresuite from Coresystems and the setup and installation of the Novaline Trigger.

The installation of the Novaline Trigger is described in a separate manual.

Installation of the Novaline Service Printer:

Click on "Create Printer" to have the printer installed automatically. Then please start the gotomaxx PDFMAILER from the start menu. Click on Printer -> Novaline Service, then on Extras -> Configurations -> Mail Merge.



Enter data path:

The Novaline Service Printer is used to create files that the Novaline Trigger processes. Enter the path to the transfer directory here as it was set up in the Novaline Trigger.

Numbering series (SAP): Activate the checkbox if documents from B1 are archived with numbering series and these are to be displayed in the archiving.

Linking document-oriented: With this setting, only directly related documents are linked and displayed. This **setting cannot be undone by the user**.

Close Filing/Scanning dialogue automatically: This option is activated by default and causes the dialogues to be closed when archiving via Filing and Scanning. If the checkbox is deactivated, the dialogue with the entered information remains.

Internal PDF display: With this option you do not need Adobe Reader as PDF display for viewing documents in the archive. This setting offers the following options, among others: Set stamp (Configurable), quick overview and a comment function.

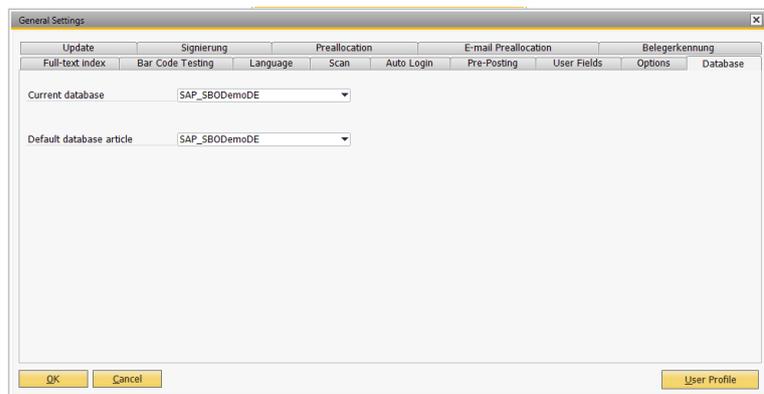
Use PDF stamp when printing: If the internal PDF display has been activated, this option transfers an added PDF stamp for printing.

1.2.3.8 Database

On the *Database* tab, select your default database per data type (address/article).

The database is only available for selection after adding the data source definition (-> *Data source definition*).

If you are working in a network and you do not have a database available in the selection, please contact your administrator.

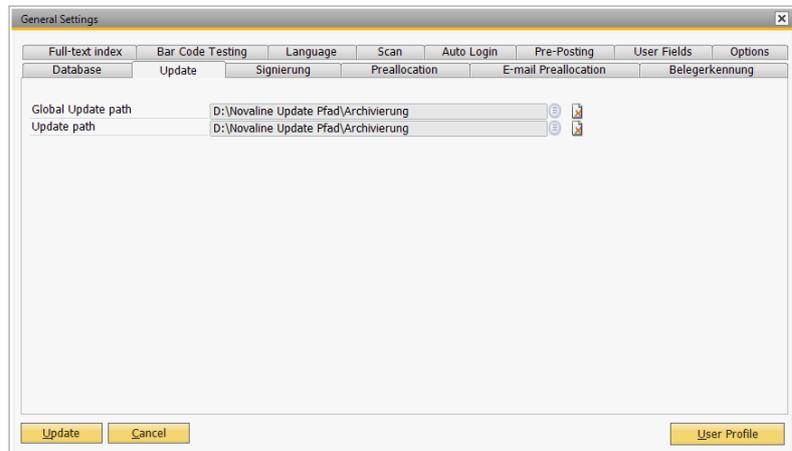


After making a change, press the *Update* button  and then *OK*  .

1.2.3.9 Update

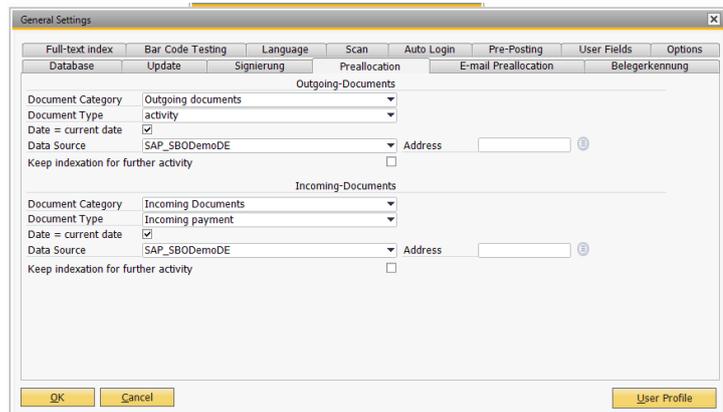
On this tab you store your valid installation directory for software updates of the Novaline archiving.

The system then automatically determines - when the programme is started - whether a newer version of the software is available.



1.2.3.10 Preassignment

On this index card you can preset various items for outgoing documents as well as for incoming documents.



Document type

In the Document Category area you can select the document type you want to use for pre-choosing the outgoing documents and incoming documents.

Document type

In the Document Type area you can select the document types you want to use for pre-choosing the outgoing and incoming documents.

Date = current date

If you activate the checkbox for Date = current date, the current date is displayed in document archiving (see in the menu under Archiving > "Document archiving").

Data source and address

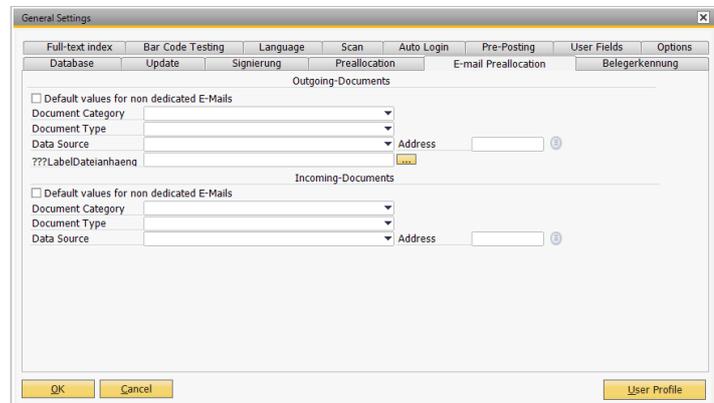
For accurate pre-population you can also select the data source and address you want to pre-choose for your documents.

Keep keywording for further operation

If you activate the checkbox "Keep keywording for further processes", the options that you have preset will be displayed for further processes during document archiving.

1.2.3.11 Pre-assignment e-mail

On this tab, you can preset the emails you want to archive with certain options, just like in the presetting. This applies to outgoing documents (outgoing emails) as well as to incoming documents (incoming emails).



Document category

In the Document Category area you can select the document category you want to use for pre-choosing outgoing documents (outgoing emails) and incoming documents (incoming emails).

Document type

In the Document Type area you can select the document types you want to use for pre-choosing outgoing documents (outgoing emails) and incoming documents (incoming emails).

Data source and address

For an exact pre-population you can also select the data source and the address, in addition to which you would like to pre-choose your receipts (emails).

Preset unassigned emails

If you activate the checkbox "Preassign unassigned emails" the emails are assigned to the address you have selected. You can then archive the [assigned emails](#).



For this an (e-mail) address must be created in SAP BO. Or you can create your own company address as a dummy address. However, this process should be handled with care, as all e-mails that are not assigned are archived to the address you have set up.

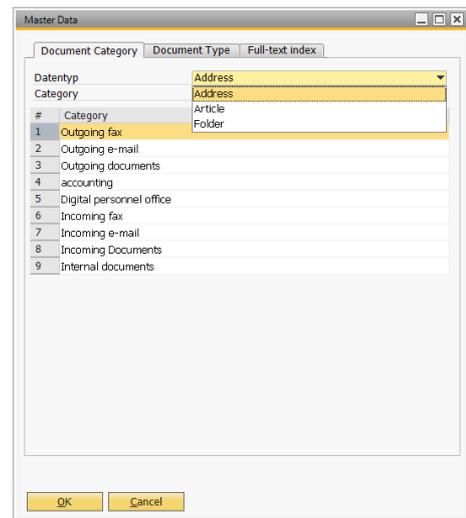
1.2.4 Master data

In the master data you define certain master information that ensures automatic and semi-automatic archiving. Some default information is already created. We distinguish here between the master data for address archiving and for article archiving.

1.2.4.1 Document category

1.2.4.2

The document category define the structure that is built up in the Novaline archive. The document category is the highest hierarchy level after the data type. In the *Data type* field, select either *Article*, for archiving to the article, or *Address*, for archiving to the address. You can add document types via the *Add* button of  the toolbar. Enter the value in the Type field and confirm your entry with *Add* . If you do not want to make any further entries, click the *Cancel* button  and then *OK* .



#	Category	Type
1	Outgoing fax	Folder
2	Outgoing e-mail	
3	Outgoing documents	
4	accounting	
5	Digital personnel office	
6	Incoming fax	
7	Incoming e-mail	
8	Incoming Documents	
9	Internal documents	

If you want to change an existing entry, select the entry from the list. The value is transferred to the edit field at the top. Make your changes here and confirm with *Update* . You can delete an entry using the *Delete* button on  the toolbar. To do this, mark the entry to be deleted with the mouse and then press the button . The name is limited to 50 characters.

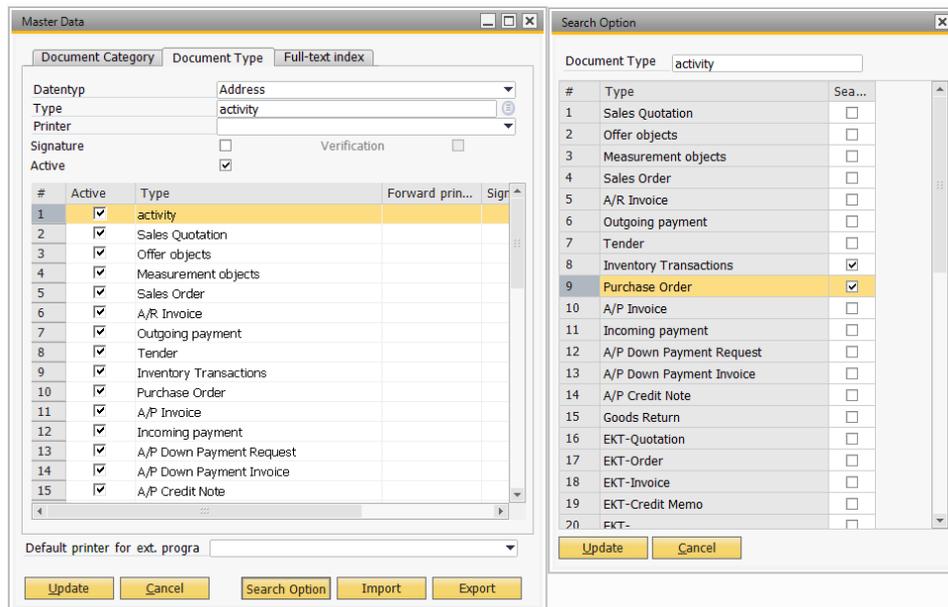


Only document categories that have not yet been used can be deleted.



If default values are changed and/or deleted, automatic and correct archiving is not possible.

1.2.4.3 Document type



The screenshot shows two SAP windows. The 'Master Data' window on the left has 'Document Category' set to 'Address' and 'Document Type' set to 'activity'. Below this is a table of document types with an 'Active' column. The 'Search Option' window on the right shows a search for 'activity' and a list of document types with checkboxes for selection.

#	Active	Type	Forward prin...	Sign
1	<input checked="" type="checkbox"/>	activity		
2	<input checked="" type="checkbox"/>	Sales Quotation		
3	<input checked="" type="checkbox"/>	Offer objects		
4	<input checked="" type="checkbox"/>	Measurement objects		
5	<input checked="" type="checkbox"/>	Sales Order		
6	<input checked="" type="checkbox"/>	A/R Invoice		
7	<input checked="" type="checkbox"/>	Outgoing payment		
8	<input checked="" type="checkbox"/>	Tender		
9	<input checked="" type="checkbox"/>	Inventory Transactions		
10	<input checked="" type="checkbox"/>	Purchase Order		
11	<input checked="" type="checkbox"/>	A/P Invoice		
12	<input checked="" type="checkbox"/>	Incoming payment		
13	<input checked="" type="checkbox"/>	A/P Down Payment Request		
14	<input checked="" type="checkbox"/>	A/P Down Payment Invoice		
15	<input checked="" type="checkbox"/>	A/P Credit Note		

#	Type	Sea...
1	Sales Quotation	<input type="checkbox"/>
2	Offer objects	<input type="checkbox"/>
3	Measurement objects	<input type="checkbox"/>
4	Sales Order	<input type="checkbox"/>
5	A/R Invoice	<input type="checkbox"/>
6	Outgoing payment	<input type="checkbox"/>
7	Tender	<input type="checkbox"/>
8	Inventory Transactions	<input checked="" type="checkbox"/>
9	Purchase Order	<input checked="" type="checkbox"/>
10	A/P Invoice	<input type="checkbox"/>
11	Incoming payment	<input type="checkbox"/>
12	A/P Down Payment Request	<input type="checkbox"/>
13	A/P Down Payment Invoice	<input type="checkbox"/>
14	A/P Credit Note	<input type="checkbox"/>
15	Goods Return	<input type="checkbox"/>
16	EKT-Quotation	<input type="checkbox"/>
17	EKT-Order	<input type="checkbox"/>
18	EKT-Invoice	<input type="checkbox"/>
19	EKT-Credit Memo	<input type="checkbox"/>
20	FKT-	<input type="checkbox"/>

The document type is the second hierarchy level directly below the document category. In the *Data type* field, select either *Article*, for archiving to the article or *Address*, for archiving to the address or *Folder*, for archiving to the folder structure.

You can add document types via the *Add* button of the toolbar. Enter the value in the *Type* field and confirm your entry with the *Add* button. If you do not want to make any further entries, click on the *Cancel* button and then on *OK*.

If you want to change an existing entry, select the entry from the list. The value is transferred to the edit field at the top. Make your changes here and confirm with *Update*.

You can delete an entry via the *Delete* button of the toolbar. To do this, mark the entry to be deleted with the mouse and then press the button.

For a better overview of the document types a field "Active" has been added. This field can be used to determine which document types are to be displayed during document archiving and document scanning.



If a document is archived from SAP B1, the "Active" field for the document type is automatically set. A document type that has been used in the archive cannot be deactivated or deleted.

The default values given here for the data type *address* are identical to the document areas of SAP Business One®. For automatic archiving within SAP Business One®, please only use designations of the SAP document areas. Of course you can extend the list of default values. This has no effect on automatic archiving from SAP Business One®.

The *Printer* area offers you the option of selecting a separate printer or printer tray for each receipt. First select the document type and then the corresponding printer from the list box . If the desired printer is not displayed, define it in the printer settings of your Windows interface.

In the *Printer for external programmes* list box, select the desired printer for your external documents. These are all files that you want to print independently of SAP Business One® and archive at the same time. If no printer is selected, the documents are only archived and not printed.

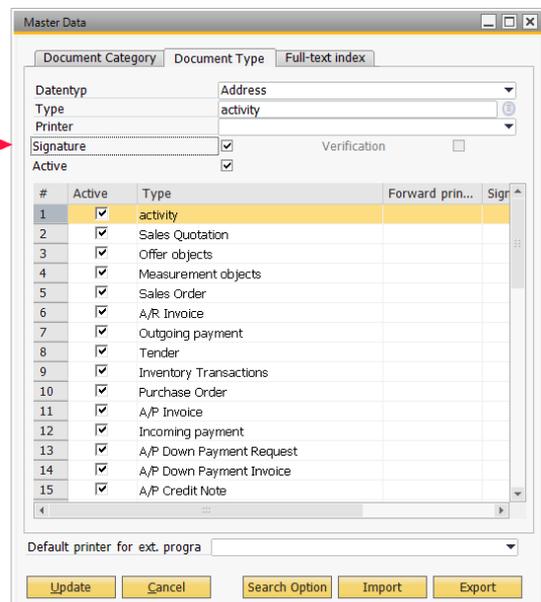
After licence approval for the e-billing procedure, the dialogue is supplemented with checkboxes for signing and verification per document type.



Select the desired document type(s) and activate the checkbox *Signing*. Confirm your changes with *Update* .

The checkbox for verification is only active after activation of the signing.

All values can be exported to any directory via the *Export* button and imported again via the *Import* button, e.g. at another workstation.



#	Active	Type	Forward prin...	Sign
1	<input checked="" type="checkbox"/>	activity		
2	<input checked="" type="checkbox"/>	Sales Quotation		
3	<input checked="" type="checkbox"/>	Offer objects		
4	<input checked="" type="checkbox"/>	Measurement objects		
5	<input checked="" type="checkbox"/>	Sales Order		
6	<input checked="" type="checkbox"/>	A/R Invoice		
7	<input checked="" type="checkbox"/>	Outgoing payment		
8	<input checked="" type="checkbox"/>	Tender		
9	<input checked="" type="checkbox"/>	Inventory Transactions		
10	<input checked="" type="checkbox"/>	Purchase Order		
11	<input checked="" type="checkbox"/>	A/P Invoice		
12	<input checked="" type="checkbox"/>	Incoming payment		
13	<input checked="" type="checkbox"/>	A/P Down Payment Request		
14	<input checked="" type="checkbox"/>	A/P Down Payment Invoice		
15	<input checked="" type="checkbox"/>	A/P Credit Note		

  Only document types that have not yet been used can be deleted. There are mentioned settings for printing and for the EBilling procedure only applied in connection with the data type *address*.

If default values are changed and/or deleted, automatic and correct archiving is not possible.

If no printer is selected for one or more document types, only archiving takes place when printing these documents via the *Novaline* archivor, no output to the printer then takes place.

If the same document type has different names within SAP Business One® (e.g. *Quotation* in the Quotation creation screen but *Quotations* in the Quotations document printout screen), the alias file (-> Chapter 1.2.8 [Document type alias](#)) is used to define the correct archiving for a document type.

Search option

With this, a combined search across several document types can be firmly specified. For example, when you search for service contracts, you also want to search within the archived service calls.

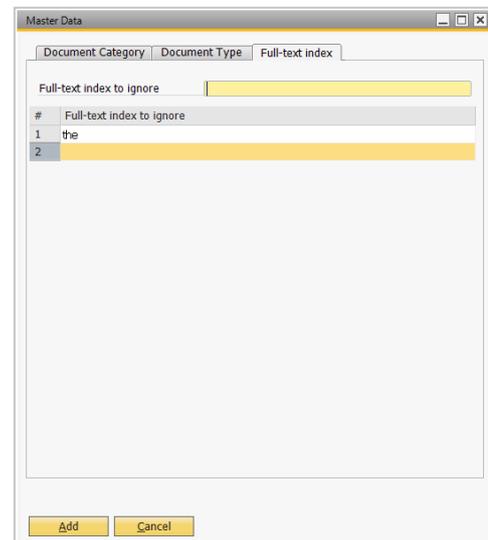
To do this, mark the document type "Service contract" and click on "Search option". A list of document types appears, mark the one for which the search is to be combined. Set the checkbox at "Service call" and close the dialogue. The search option set up is then displayed in the corresponding column.

1.2.4.4 Keywording

The words that are to be excluded from automatic keywording during archiving are stored on the Keywording tab. You can add keywords via the *Add* - button of  the toolbar. Enter the value in the *Exclude as keyword* field and confirm your entry with the *Add*  button.

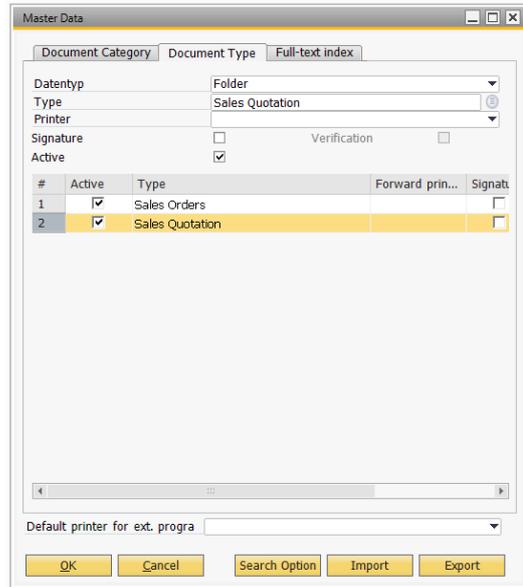
If you do not want to make any further entries, click on the *Cancel* button  and then on *OK* .

If you want to change an existing entry, select the entry from the list. The value is transferred to the edit field at the top. Make your changes here and confirm with *Update* . You can delete an entry using the *Delete* button on  the toolbar. To do this, mark the entry to be deleted with the mouse and then press the button .



1.2.4.5 Document type / folder structure

Under Data type you can select "Folder" and include the document types. The included document types must be set to "Active".

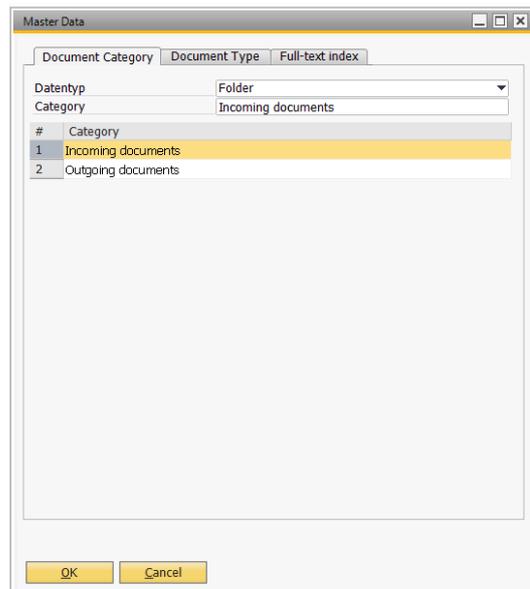


The screenshot shows the 'Master Data' window for 'Document Type'. The 'Document Type' tab is active. The 'Datentyp' is set to 'Folder' and the 'Type' is 'Sales Quotation'. The 'Active' checkbox is checked. Below the fields is a table with the following data:

#	Active	Type	Forward prin...	Signatu
1	<input checked="" type="checkbox"/>	Sales Orders		<input type="checkbox"/>
2	<input checked="" type="checkbox"/>	Sales Quotation		<input type="checkbox"/>

Buttons at the bottom include 'OK', 'Cancel', 'Search Option', 'Import', and 'Export'.

Under the tab Document category you can select "Folder" under Data type for this. Therefore you can now select the document categories.

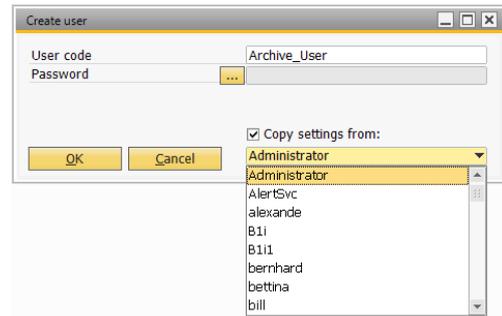


The screenshot shows the 'Master Data' window for 'Document Category'. The 'Document Category' tab is active. The 'Datentyp' is set to 'Folder' and the 'Category' is 'Incoming documents'. Below the fields is a table with the following data:

#	Category
1	Incoming documents
2	Outgoing documents

Buttons at the bottom include 'OK' and 'Cancel'.

Enter the user name. If desired, you can enter  a password via the button. On the right-hand side of the screen, you can manage the accesses of the individual dialogues within Novaline Archiving. If you want to take over the authorisations of a previous user, activate the checkbox *Take over settings* from and select the desired user name from the list.



Confirm your entries with OK. The transfer of authorisations refers exclusively to the dialogue level. Any database restrictions are not taken into account.

If the settings of an existing profile are to be subsequently transferred to an existing profile, proceed as follows:

Click with the right mouse button on the profile to be copied.

Select .

Click with the right mouse button on the profile that is to take over the settings.

Select .

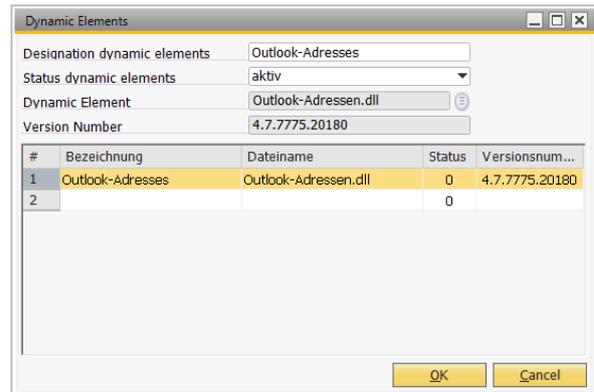
1.2.5.1 User transfer from Business One

When Novaline Archiving is called up for the first time from SAP Business One® (document management), all users defined in Business One are copied to Novaline Archiving. The user rights and passwords must then be defined on a user-specific basis.

1.2.5.2 Dynamic elements

Dynamic elements are used to read out information that is not stored in databases with the help of ".DLL" files.

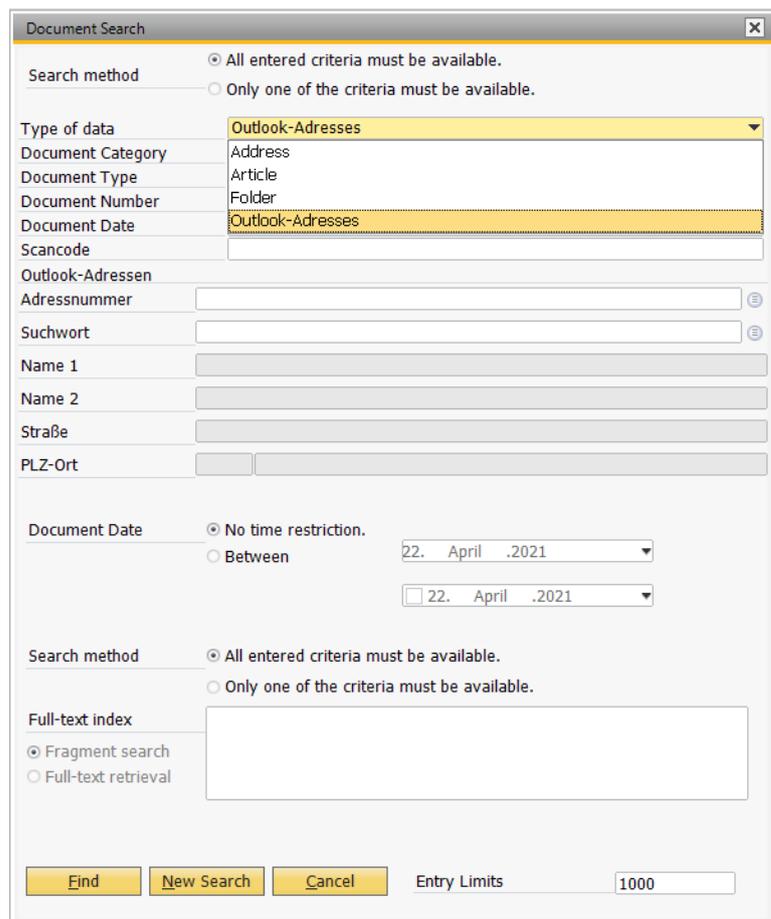
For example, the email addresses of Outlook contacts can be linked to Novaline archiving.



#	Bezeichnung	Dateiname	Status	Versionsnum...
1	Outlook-Adresses	Outlook-Adressen.dll	0	4.7.7775.20180
2			0	

By adding a dynamic element, it is possible to archive documents for the respective dynamic element instead of an address, an article or a folder.

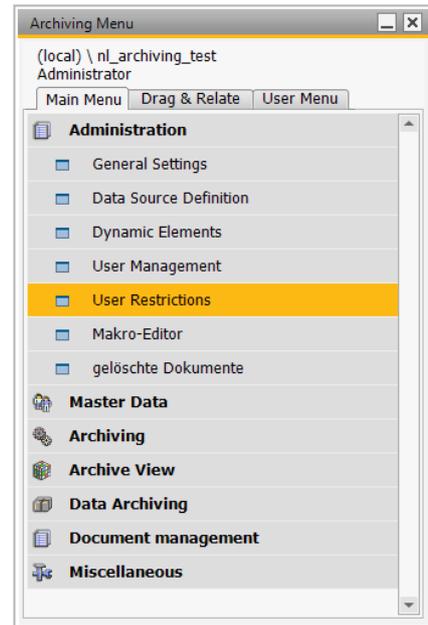
Under the [archive view](#), there is also the possibility to filter and select a dynamic element in the *data type* field.



1.2.6 User restriction

User restriction is also started from the *Administration* menu.

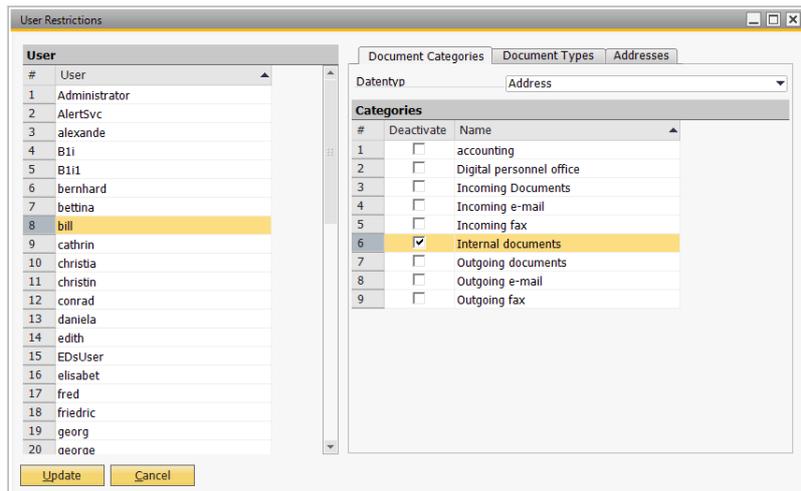
Here, the restrictions of the users are carried out on the database level.



In the left-hand area of the screen select the user to be edited. In the right-hand area of the screen deactivate the individual permissions.

In principle, all database accesses are permitted.

The restrictions can apply to individual addresses, to certain document types and to the entire range of document types. A combination is also possible.



If you want to prevent the entire *outgoing documents mail* area from *being* displayed, activate the checkbox in front of the document type on the "Document Categories" tab.

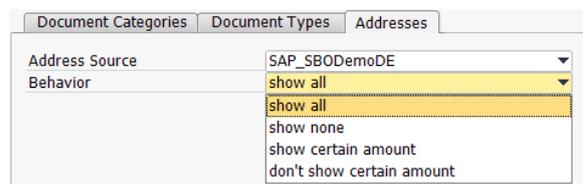
4	<input type="checkbox"/>	Incoming e-mail
5	<input type="checkbox"/>	Incoming fax
6	<input checked="" type="checkbox"/>	Internal documents

If one (or more) document type(s) should not be displayed, activate the checkbox in front of the respective document type on the *Document Types* tab.

1	<input checked="" type="checkbox"/>	A/P Credit Note
2	<input checked="" type="checkbox"/>	A/P Down Payment Invoice
3	<input checked="" type="checkbox"/>	A/P Down Payment Request
4	<input checked="" type="checkbox"/>	A/P Invoice

Permission to view archived documents from specific databases, from individual addresses or preventing viewing are controlled on the *Addresses* tab.

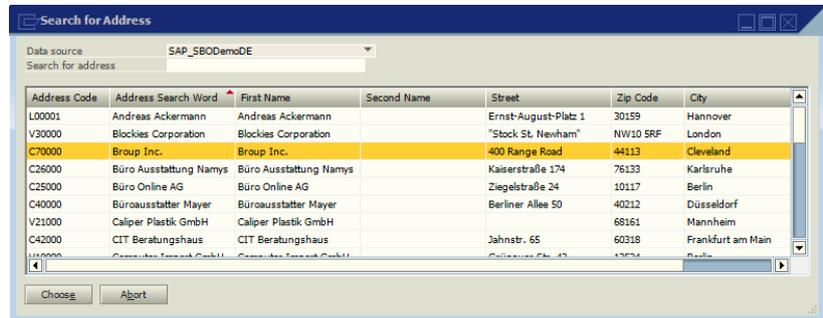
In the *Address Source* field select the desired database from the list for which you want to make the settings. In the *Properties* field select one of the four options. You can decide whether all addresses in the database should be available or none.



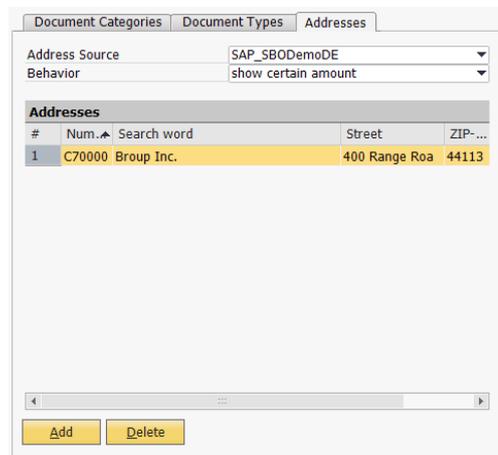
It is also possible to restrict the address list by selecting the value *See specific* or *Do not see specific*.

If the view of the address list is to be restricted an empty table appears, which you can extend with the desired addresses via the **Add** button.

Select the desired addresses from the address list one after the other and confirm with **Select**.



If you would like to add further addresses at a later date. This is possible at any time. *Addresses that* have already been selected are also marked on the **Addresses** tab and deleted from the address list **Delete** with *Remove* button.



Finally, confirm your entries with the **Update** button.

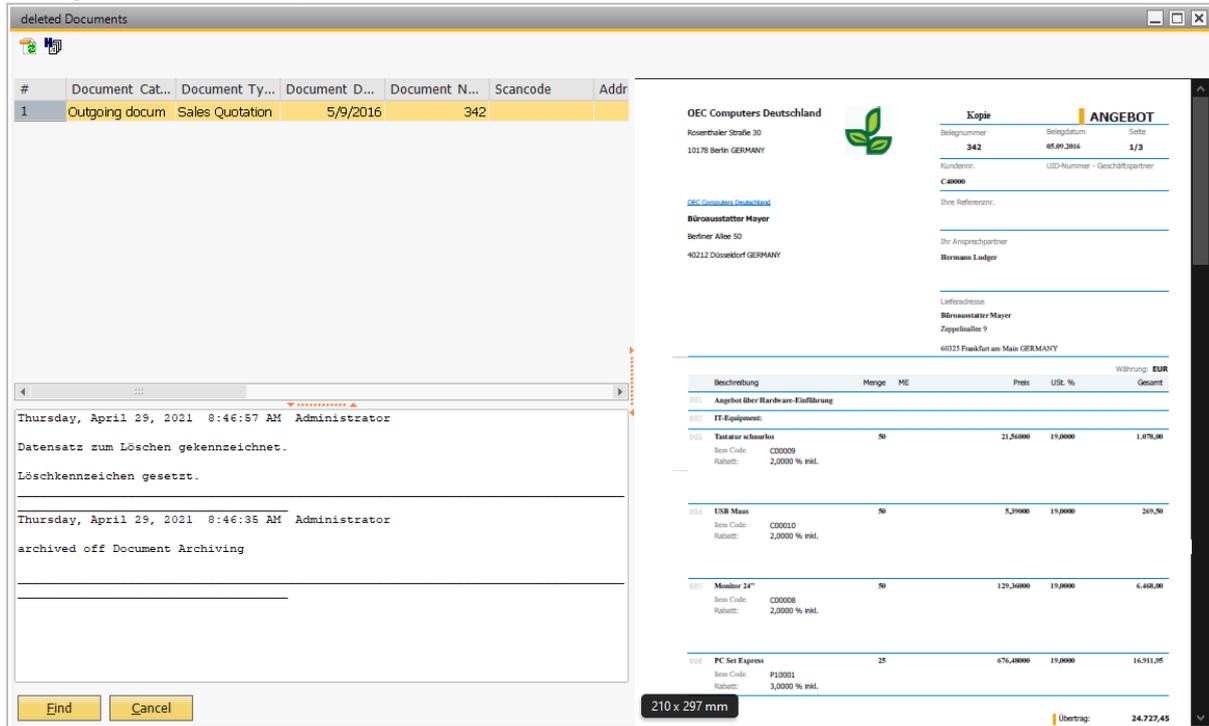
The user restriction applies to the archive search. Archiving of documents can be done by any user at any time.

1.2.7 Deleted documents

Documents can be subsequently deleted from the archive. With the button  the selected documents can be marked for deletion from the **archive view**.

An internally selected user with the authorisation "delete permanently" can delete the selected documents of the archive permanently under the menu item *Administration, Deleted Documents*.

Any change in the deletion is properly stored in a history so that it is possible to track the changed records at any time.



The screenshot shows the 'deleted Documents' window in SAP. On the left, a table lists deleted documents:

#	Document Cat...	Document Ty...	Document D...	Document N...	Scancode	Addr
1	Outgoing docum	Sales Quotation	5/9/2016	342		

Below the table, a history log shows the deletion process:

```

Thursday, April 29, 2021 8:46:57 AM Administrator
Datensatz zum Löschen gekennzeichnet.
Löschkennzeichen gesetzt.

Thursday, April 29, 2021 8:46:35 AM Administrator
archived off Document Archiving
  
```

On the right, a detailed view of a sales quotation is shown for 'OEC Computers Deutschland'. It includes contact information, a table of items, and a total amount.

Bezeichnung	Menge	ME	Preis	USt. %	Währung: EUR	Gesamt
IT-Equipme...						
Testator schwarzes	50		21,50000	19,0000		1.075,00
USB Maus	50		5,20000	19,0000		260,50
Mausler 14"	50		129,30000	19,0000		6.468,00
PC Set Express	25		676,48000	19,0000		16.911,05

At the bottom right, the total amount is shown as 24.727,45.

1.2.8 Document type Alias

In the alias file, the designation from document processing in SAP Business One® is assigned to the document type in Archiv.One.

The designations that are stored as document type in the master data (-> [1.2.4.2 Document type](#)) must match for automatic archiving from Business One. When you open the quotation creation dialogue, the name of the dialogue is "Quotation". Consequently, the name "Quotation" must also be stored in the Archiv.One master data. As the dialogue for printing quotations in document printing (batch printing) is "Quotations", the designation "Quotations" must now also be stored in the archiving master data. This would have the consequence that offers would be archived with different designations and during a later document search either the documents with the document type "offer" or with the document type "offers" would be listed or searched for. For uniform archiving we therefore recommend referring the values received from Business One to a common value for archiving.

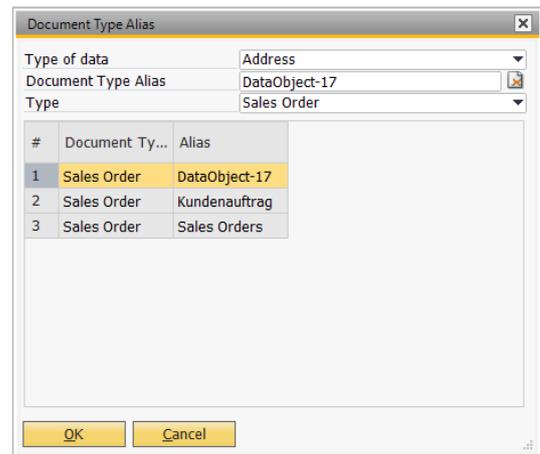
Some document designations are already supplied, such as quotations (alias for quotation), incoming invoices (alias for incoming invoice) etc. Others can be added at any time.

To add new alias names, open the dialogue Master data/Document type and click on the search button in the field "Type" .

Type activity 

The "Document Type Alias" dialogue opens.

To now define an alias designation "Order confirmation" for a document type "Sales order", select the document type "Sales order" in the "Type" field, as shown in the example here, and enter the designation "Order confirmation" in the "Document type alias" field. Then click on Save. To delete an alias definition, click with the mouse on the corresponding line number, the corresponding alias definition is entered above. Click on the delete button to remove the alias definition.



#	Document Ty...	Alias
1	Sales Order	DataObject-17
2	Sales Order	Kundenauftrag
3	Sales Order	Sales Orders

This process happens automatically if a document type is to be archived from Business One that does not exist in the archive. Then the dialogue "Document type alias" appears the corresponding entry of the non-existing document type is already made as "Document type alias", just select the document type to be assigned. "OK" accepts the assignment as an "Alias" designation. "Cancel" opens the "Master data/Document type" dialogue. The new document type is already entered below and can now be created as a "Document type" instead of an alias definition.

1.3 Archiving

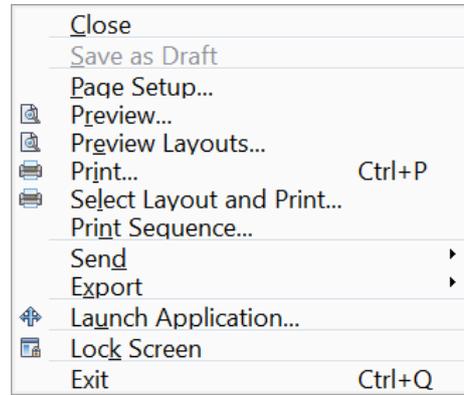
In this chapter you will learn in which processing areas Novaline archiving is integrated. We distinguish here:

- the automatic archiving of SAP Business One documents
(→Chapter [1.3.1](#))
- scanning and archiving of incoming documents processed in BO
(→Chapter [1.3.1.1](#))
- archiving from the file system
(→Chapter [1.3.2](#))
- the scanning and archiving of incoming documents, without allocation in BO
(→Chapter [1.3.3](#))
- archiving documents from other Windows applications
(→Chapter [1.3.4](#))
- Archiving e-mails and attachments
(→Chapter [1.3.5](#))

1.3.1 Document archiving from SAP Business One

Document archiving to an address (data type = *address*) is firmly integrated into the document processing of SAP Business One® after installation and add-on registration. The archiving runs in the background so that you are not affected by this in your daily work.

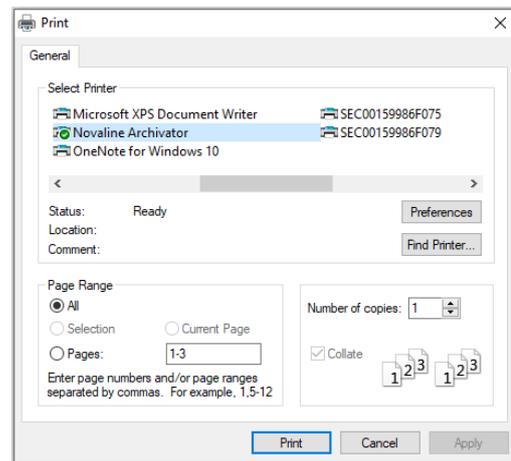
Archiving for the data type *address* is controlled via the printout of documents. For this purpose, the archive printer *Novaline Archivator* is selected instead of your preferred printer. Parallel to the document printout on the printer archiving takes place in the Novaline database. For example, you create an offer and send it to the printer via the menu *File, Print* or via the button *Add* ( if an immediate printout has been activated in the master data).



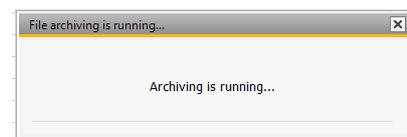
Select *Novaline Archivator* as the printer in the print dialogue. Only then will the document be printed to the archive. If you only need a printout and do not want to archive, select another printer for this.

When printing simultaneously via the *Add*  button, the printer selection doesn't open.

For correct use the *Novaline Archivator* must be stored as the default printer.



The archiving of the document takes place automatically in the background after confirming with the *Print*  button. The archiving dialogue appears for a short moment with a note that *archiving is active*.

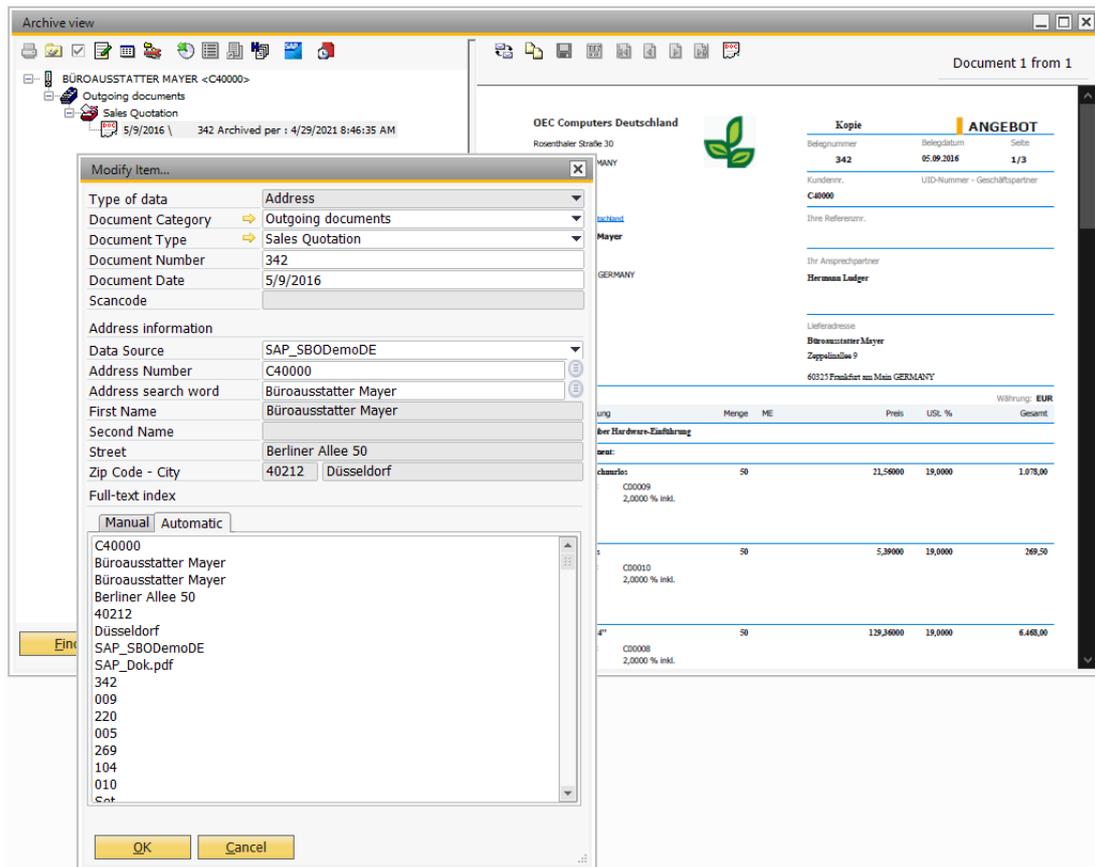


In addition to the document copy, the metadata is stored in the database. This includes the values:

- Data type
- Document category
- Document type
- Document number
- Address source
- Address number
- Address search word
- Document date
- Automatic keywords (full text)
- User-defined fields

The output to the printer in parallel to archiving a document is possible if a corresponding printer assignment has been made in the master data (→Chapter [1.2.4.2 Document type](#)).

The document is indexed according to its type and nature. If you archive a quotation, the document type *Outgoing documents - post* and the document type *Quotation* are automatically entered. The document number is taken of the document. The same applies to the document date and the address search word with the address.



The screenshot shows the SAP Archive view interface. On the left, a tree view shows the hierarchy: BÜROAUSSTATTER MAYER <C40000> -> Outgoing documents -> Sales Quotation -> 5/9/2016 \ 342 Archived per : 4/29/2021 8:46:35 AM. The main area displays a document preview for 'OEC Computers Deutschland' with a green leaf logo. The document is a 'Kopie' (copy) of an 'ANGEBOT' (offer) with document number 342, dated 05.09.2016, page 1/3. The customer is 'Büroausstatter Mayer' (C40000) with address 'Berliner Allee 50, 40212 Düsseldorf'. A table below shows items with columns for 'Menge', 'ME', 'Preis', 'USD. %', and 'Währung: EUR Gesamt'. The items are:

Item	Menge	ME	Preis	USD. %	Währung: EUR Gesamt
00009 2,0000 % inkl.	50		21,56000	19,0000	1.078,00
00010 2,0000 % inkl.	50		5,39000	19,0000	269,50
00008 2,0000 % inkl.	50		129,34000	19,0000	6.488,00

In the foreground, a 'Modify Item...' dialog box is open, showing fields for 'Type of data' (Address), 'Document Category' (Outgoing documents), 'Document Type' (Sales Quotation), 'Document Number' (342), and 'Document Date' (5/9/2016). The 'Address information' section includes 'Data Source' (SAP_SBODemoDE), 'Address Number' (C40000), 'Address search word' (Büroausstatter Mayer), and 'Street' (Berliner Allee 50). The 'Full-text index' section shows a list of indexed words: C40000, Büroausstatter Mayer, Berliner Allee 50, 40212, Düsseldorf, SAP_SBODemoDE, SAP_Dok.pdf, 342, 009, 220, 005, 269, 104, 010, Cat.

All words from the document are automatically keyworded according to your settings (→Chapter [1.24.3 Keywording](#)).

If the dialogue is opened according to the example above, the settings for automatic archiving are **not** correct. Archiving takes place in the background and the dialogue for archiving should not be displayed here. In this case, check the settings described above in the master data. Make corrections if necessary.

A compilation of all documents from the current document area (e.g. offers) is possible at any time via the *Archive*  button. The archive then provides you with preselected documents. In our example, all offers from the selected address are displayed.

For more information on the archive view, see Chapter [1.4 Archive - Document Search](#).



Each time you select the Novaline archiver, an entry is created in the archive. If you correct a receipt that has already been printed and archived. You can send it to the Novaline archiver printer again, the receipt is placed in the archive a second time.

1.3.1.1 Collective printing and archiving

A collective print with automatic or semi-automatic archiving of receipts from SAP Business One® is also possible. To do this, select the collective print for the desired document type. Confirm your selection with **OK**.

Then select the desired documents from the print list and confirm your entries with **Print** . In the following print dialogue select the *Novaline Archivator* as printer. Also confirm with **Print** . The documents are now automatically stored in the archive.

1.3.1.2 Archive and send by e-mail

In order to be able to send the documents by e-mail and archive them at the same time during document processing, the user-defined fields for documents must be activated on the Archiving tab in the "Novaline Add On Configurator".

Through the user-defined fields, the entry *Send by:* appears in the SBO dialogues. The drop-down list can be used to set whether the receipt is to be sent by e-mail. You have two options.

The first: *E-mail to BP* allows the receipt to be sent to the company e-mail address stored in the master data of the business partner.

General		
Kommissionieren		
Versand per	Postweg	
Scancode	0	- Postweg
	1	- E-Mail an GP
	2	- E-Mail an AP

The second: *E-mail to AP* enables the document to be sent to the e-mail address stored in the master data of the contact person selected in the document.

General		
Kommissionieren		
Versand per	Postweg	
Scancode	0	- Postweg
	1	- E-Mail an GP
	2	- E-Mail an AP

1.3.1.3 Archiving via the Coresuite add-on from Coresystems

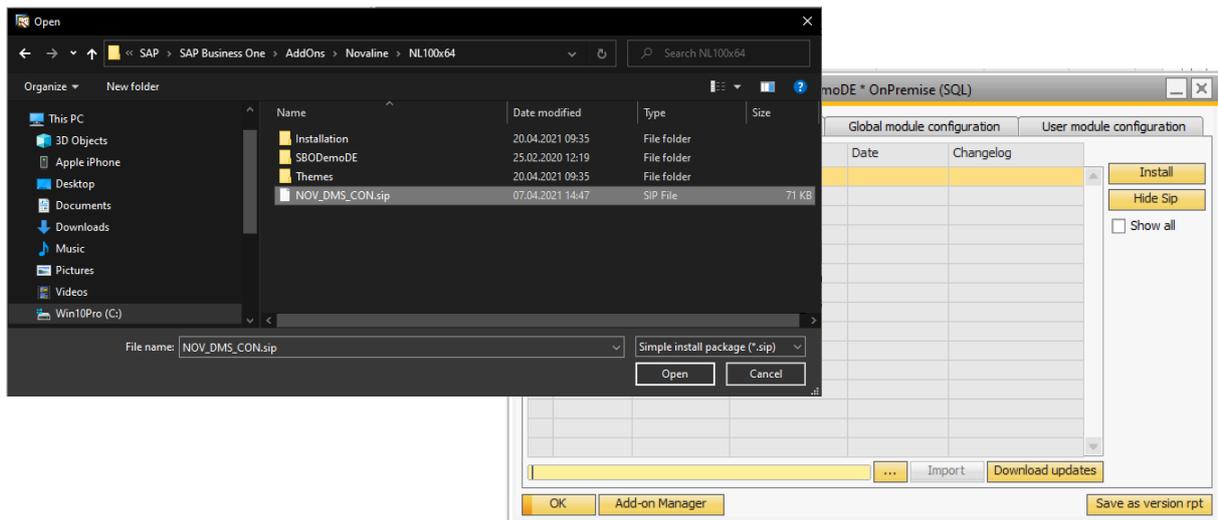
The prerequisite is the correct installation of the following programmes

- Add-on Coresuite from Coresystems AG, CH-Windisch, from version 2.10 or higher
- Coresuite Designer, from version 1.347 or higher
- Novaline Add-on Version, from 2.0.7 or higher
- Novaline archiving, from version 002.007.001 or higher.

Detailed procedure

1. Installation of the Novaline Connector:

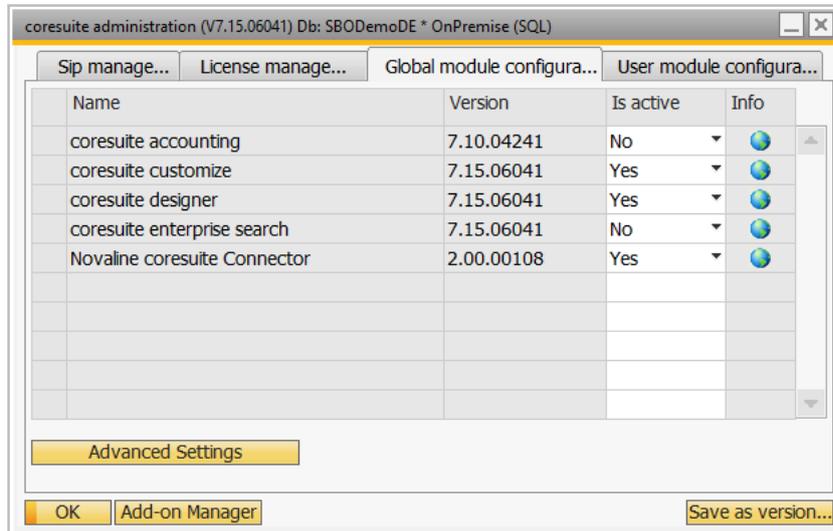
The Novaline Connector "NOV_DMS_CON.sip" can be found in the installation directory of SAP Business One in the folder of the Novaline ADDOn version, here NL100x64 under



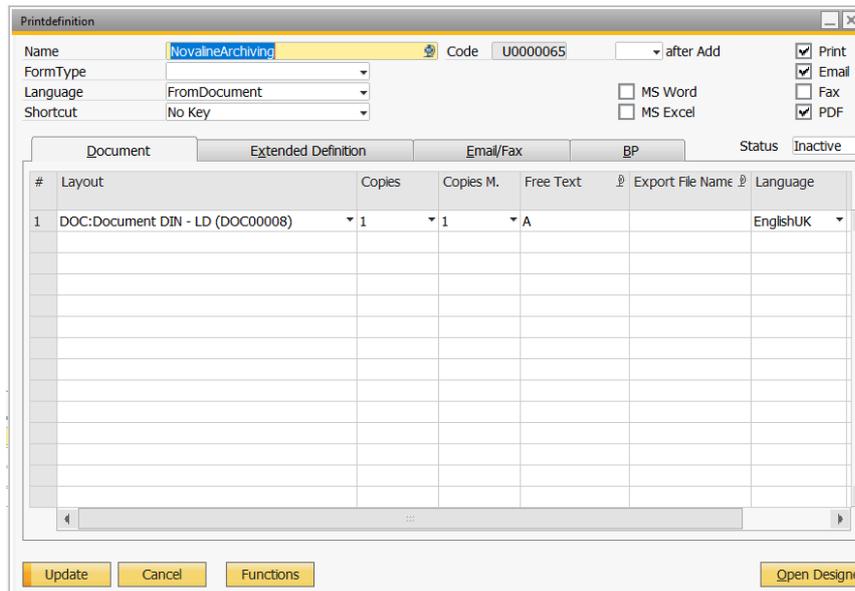
"%programfiles%\SAP\SAP Business One\AddOns\Novaline\"

Open the Coresuite Administration with the button  and import the file "NOV_DMS_CON.sip".

The connector must then be installed as usual; it should then be visible as active in the "Global Module Configuration" tab.



2. Create an inactive print definition for archive printing:



3. Open the print definition in Coresuite Designer and create a new print definition (e.g. "Novaline Archive"). The code (here "U0000065") is important for the later script and should be noted here.

The layout for which an archive process is to be created automatically is entered in this print definition.

Assign a unique letter in the "Free Text" field (here "A"). This will perform the print process on the Novaline Archivator for archiving at a later point in the layout definition.

Set the status to "Inactive".

4. Customise the layout definition referenced in the Novaline print definition.

5. In Coresuite, open the layout definition for the document as entered in the print definition in point 2 (here "Document DIN (DOC00008)").

On the "Printer" file card add a letter to the existing print jobs at "Free Text", which will be assigned to the document in the following step (see point 4) (here "N"). Add another line that is to apply to all pages:

, and Novaline Archivator. Buttons at the bottom include OK, Cancel, Functions, Preview, and Open Designer." data-bbox="352 160 874 432"/>

#	User	Usergroup	Printout Nbr	Page	FormType	Free Text	Lang	Choose	Printer
1				All other		A		<input type="checkbox"/>	Novaline Archivator

- Page: All other
- Free Text: A
- Printer: Novaline Archivator

Open the Designer Open Designer :

- Script CommonScript Dim depth As IntegerDim footerS... **Edit CommonScript :**
The NovalineEventHandler, which triggers the printing process, must be inserted into the existing script (see point 7: Scripts: CommonScript).
Instead of the code U0000035, which is marked in red for better conspicuity, the original code of the Novaline print definition must be entered, as it was assigned by Coresuite under point 2 (here "U0000035").
- GenerateScript 'Definition of Currency ' CASE 1... **Edit GenerateScript :**
With the script, as soon as a print process is triggered as a print, as a fax or as an e-mail the NovalineEventHandler is addressed, which in turn triggers the print process on the Novaline Archivator and thus the archiving process (see point 5: Scripts: GenerateScript).

7. Scripts

CommonScript

```

Dim depth As Integer
Dim footerStartPage As Integer = 0
Dim maxItemPricePage As Integer = 0
Dim isFC,isSC,FTRendered As Boolean
Dim scontoAmount As Double
Dim billToAdr,shipToAdr,docCur,lastValue As String
Dim PosNo As Integer

Private Sub NovalineEventHandler()
Const strPrintDefCode As String = "U0000054"
If (GetData("LD.Par.Preview") = "N") Then
  If (GetData("LD.Par.FreeText") <> "A") Then
    Select Case GetData("LD.Par.PrintMode")
      Case "N"
        If (GetData("LD.SysPar.Printed").Length > 0) Then
          Call LayoutHelper.LayoutOpener.ExecutePrintDef(strPrintDefCode, LayoutHelper.LayoutOpener.OpenLayoutModes.Print,
"FormType", GetData("LD.Par.FormType"), "DocEntry", GetData("LD.Par.DocEntry"))
        End If
      Case "E", "P"
        Call LayoutHelper.LayoutOpener.ExecutePrintDef(strPrintDefCode, LayoutHelper.LayoutOpener.OpenLayoutModes.Print,
"FormType", GetData("LD.Par.FormType"), "DocEntry", GetData("LD.Par.DocEntry"))
      Case Else
        End Select
    End If
  End If
End Sub

```

GenerateScript

```

Definition of Currency
' CASE 1: Document has Customer Currency which is different from the Local Currency
If Data("B1_Data.Document.CurSource") = "C" And Data("B1_Data.Document.DocCur").ToLower() <>
Data("B1_Data.Company.MainCurncy").ToLower() Then
isFC = True
isSC = False
docCur = Data("B1_Data.Document.DocCur")
' CASE 2: Document has System Currency which is different from the Local Currency
Else If Data("B1_Data.Document.CurSource") = "S" And Data("B1_Data.Company.MainCurncy").ToLower() <>
GetData("B1_Data.Company.SysCurncy").ToLower() Then
isFC = False
isSC = True
docCur = Data("B1_Data.Company.SysCurncy")
' CASE 3: Use the Local Currency
Else
isFC = False
isSC = False
docCur = GetData("B1_Data.Company.MainCurncy")
End If

Reset FirstLineText Flag
FTRendered = False
PosNo = 0
lastValue = ""

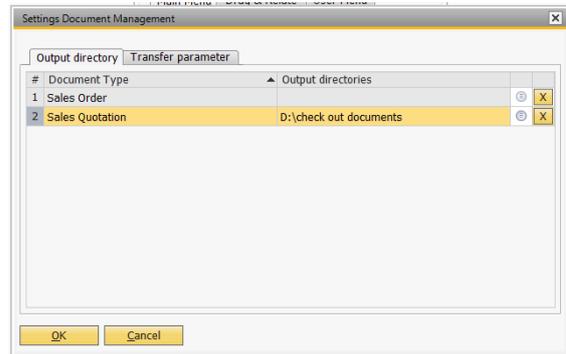
If Not Engine.IsDoublePass Then
Dim ArchivActive As Boolean = True
Try
  Dim menu As SwissAddonFramework.UI.Components.MenuItem =
SwissAddonFramework.UI.Components.Menu.MainMenu.MenuItems("NL_ARCHIV")
Catch
  ArchivActive = False
End Try
If ArchivActive Then
  If (GetData("LD.Par.Copy") = "0") Then
    Select Case GetData("LD.Par.PrintMode")
      Case "N"
        AddHandler LD.AfterPrintOrPreview, AddressOf NovalineEventHandler
      Case "E"
        AddHandler LD.AfterMailOrFax, AddressOf NovalineEventHandler
      Case "P"
        AddHandler LD.AfterExport, AddressOf NovalineEventHandler
      Case Else
        End Select
    End If
  End If
End If

```

1.3.1.4 Document management

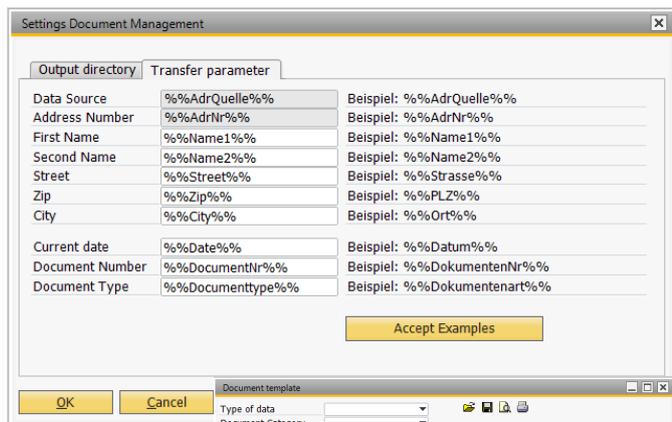
On this tab "Output directories" you can perform a path specification per document type for checking out individual documents (see [1.4.5 Editing archived Office documents](#)).

The documents are then temporarily stored in this directory. The path can also be undone by pressing button.



In the "Transfer parameters" tab, you can use the button that can then be found later in the document template in the "Fields" field.

You can then drag and drop them into the editing field with the right mouse button.

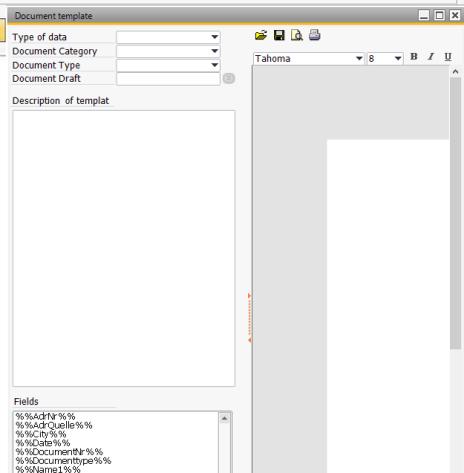


00

In the "Document template" area you can create your individual documents. To do this, you must first press the button in the "Add" bar.

From now on, you can select your document template by (data type, document category and document type). In the "Document template" area you then enter the name for the document template. In the field "Template description" you enter a description of the document templates.

In the "Fields" field you will now find the settings that we have used in the "Document Management Settings". You can now drag and drop them into the edit box.



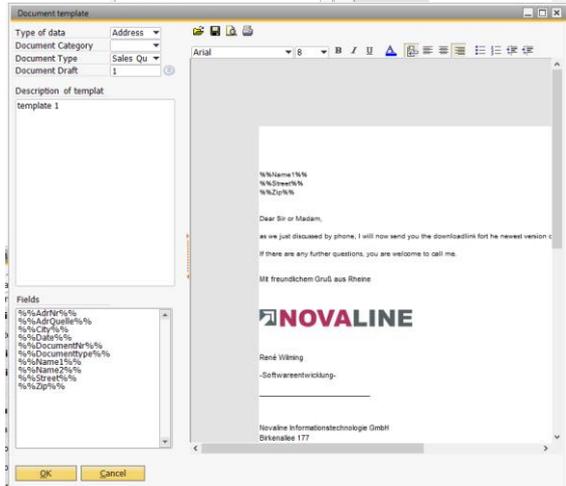
Drag the examples in the "Fields" field into the editing field with the right mouse button.

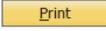
And then click on the button "Add" .

In document editing, you can create and edit documents. Here you can also store created documents directly in the archive or print them.

You proceed as follows:

First select your document with the given options such as (data type, document type, document type etc.) Now you can print/archive the document.



To do this, click on the  symbol. The document is automatically stored in the archive and also printed externally on the selected printer.

In document editing you can also select several addresses in the address browser and export them for the form letter.

 By pressing this symbol you can export the addresses.

Row	Address Code	Address Search...	First Name	Second Name	Street	Zip Code	City
1	C20000	PC Welt GmbH &...	PC Welt GmbH &...		Goethestr. 24	10625	Berlin
2	C23000	Mikrochips GmbH	Mikrochips GmbH		Hessische Str. 5	68305	Mannheim
3	C23000	Büro Online AG	Büro Online AG		Ziegelstraße 24	10117	Berlin
4	C25000	Büro Ausstattung...	Büro Ausstattung...		Kaiserstraße 174	76133	Karlsruhe
5	C30000	Computerhandel...	Computerhandel...		Fußsteig 3	21079	Hamburg
6	C40000	Büroausstatter M...	Büroausstatter M...		Berliner Allee 50	40212	Düsseldorf
7	C42000	CTT Beratungshaus	CTT Beratungshaus		Jahnstr. 65	60318	Frankfurt am Main
8	C50000	INTENT, Inc	INTENT, Inc		10 Rayleigh Road	SW19 3RF	London
9	C60000	SG Electronic	SG Electronic		208 Hollywood Ave	95030	Los Gatos
10	C70000	Group Inc.	Group Inc.		408 Range Road	44113	Cleveland
11	C99999	Web Einmalkunde	Web Einmalkunde				
12	C99999	Einmalkunde	Einmalkunde				
13	L00001	Andreas Ackerm...	Andreas Ackerm...		Ernst-August-Plat...	30159	Hannover
14	L00002	Werner Richter	Werner Richter		Schlesischer Plat...	01097	Dresden
15	L10001	Uwe Mann	Uwe Mann		Ernst-August-Plat...	30159	Hannover
16	L10002	Tobias Umang	Tobias Umang				
17	S10000	Servicepartner	Servicepartner		Karlshofer Str. 185	68219	Mannheim
18	V10000	Computer Import...	Computer Import...		Gronauer Str. 42	12524	Berlin
19	V1010	Großhandel Sch...	Großhandel Sch...		Brennerstr. 35	70182	Stuttgart
20	V20000	Michael Krause G...	Michael Krause G...		Ottoplatz 7	50679	Köln
21	V21000	Calper Plastik G...	Calper Plastik G...			68161	Mannheim
22	V22000	Müller&Clausen ...	Müller&Clausen ...		Johann-Joachim...	55128	Mainz
23	V23000	Soft- und Hardw...	Soft- und Hardw...		Kohlstr. 34	12623	Berlin
24	V30000	Blockies Corporat...	Blockies Corporat...		"Stack St, Newha...	HW19 5RF	London

This is the template browser that you will find  as an icon when editing documents. When you click on the icon, the template browser opens.

Here you can call up your already created documents again and edit them in document editing.

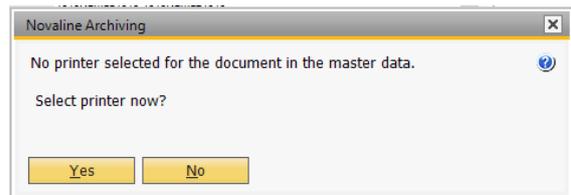
#	Name of template	Designation
1	1	template 1

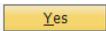
Preview: Novaline IT GmbH, Birkenallee 177, 48452 Rheine. %Name1%, %Street%, %Zip%. Dear Sir or Madam.

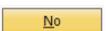
1.3.1.5 Check out documents

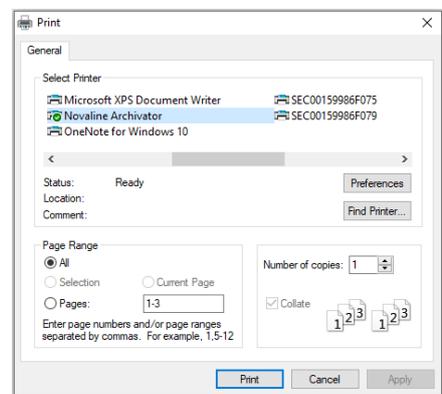
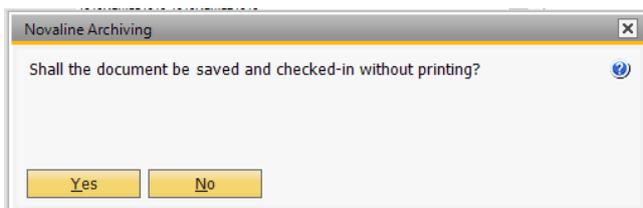
After creating a document template (see [1.3.1.4 Document Management](#)) you can edit and archive or print your created document in the menu under Document Management>Document Editing.

If you now press the Print button  and have not previously entered an external printer in the master data, the following window appears.



If you press  Yes, Windows Explorer opens with the printer selection. You can then select the printer here.

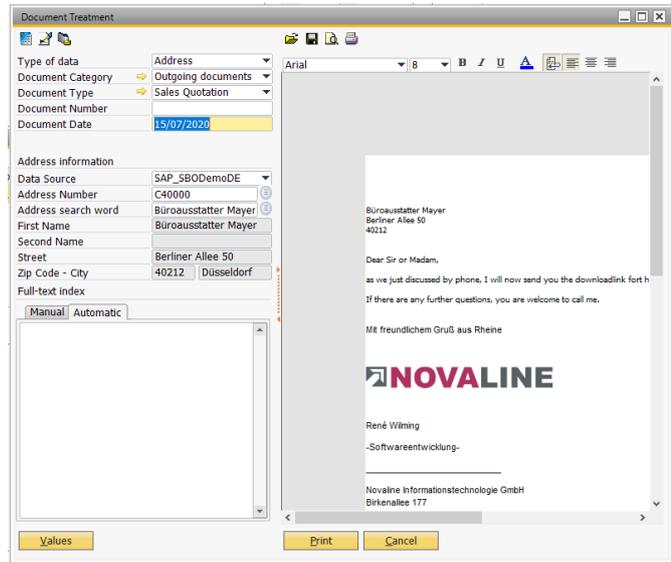
If you press  No, the following window appears. This message asks you if you want to print the document without an external printout.



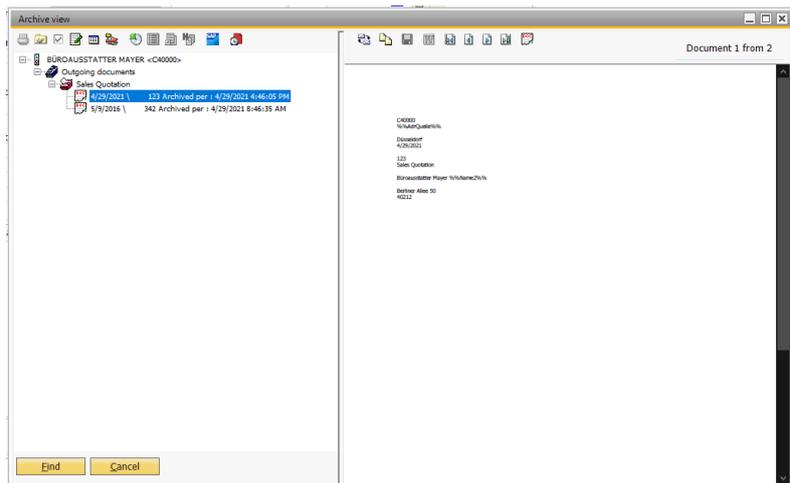
If you click Yes, the document will now be archived.

The following window shows you that the document has been checked in or archived.

You can also see from the green field that the document has been printed or archived.



After archiving the document switch in the menu to Archive view. Here you will find your archived document again.



There are now two documents here

Document 1 from 2

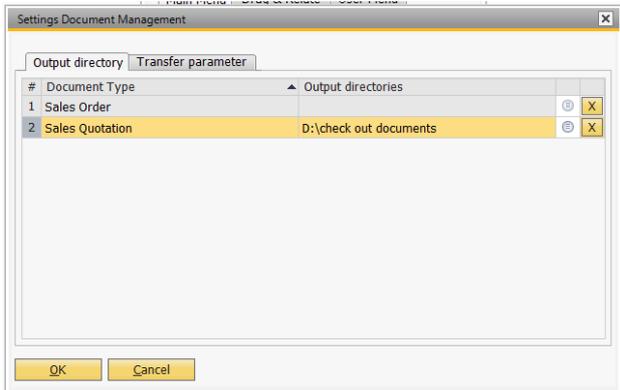
The first document has been converted to PDF and is

 You can change the documents with the forward/backward button.

 With the button you can jump to the last page.

 With the button you can jump to the first page.

The second document is the actual document from document editing and is . The symbol  is also located here.



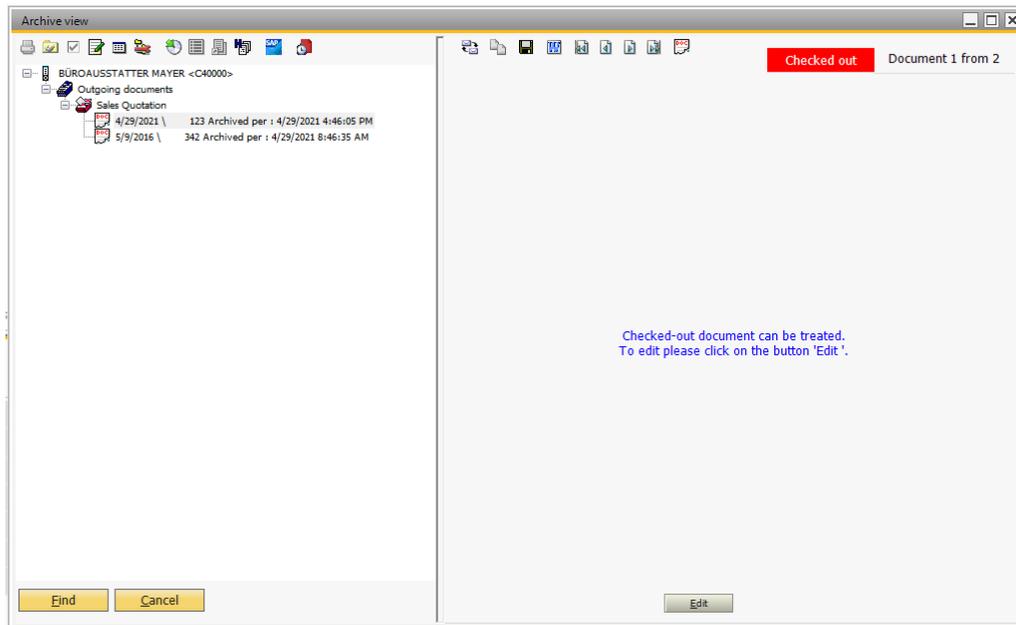
This symbol is located in the toolbar. If you press the button and have not previously set a check-out directory, the following message appears: *(No directory created/Administration/Document Management)*

This means that you must first define a directory for checking out the documents. You do this under the menu item "Document management settings".

-  When you press this button, the Windows Explorer for "Search Folder" appears. Here you can set the path for checking out the documents.
-  If you click on this button, the output directory is deleted again.
-  After you have pressed the button, the following window appears.

Here you can enter your reason for editing in the yellow field and then confirm your entry with the OK button.

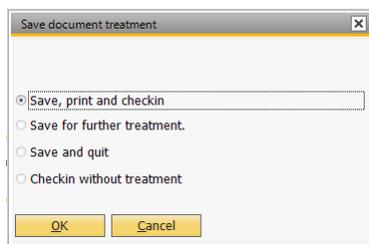
 A red symbol now appears in the display. This means that the document has been successfully checked out.



 You will also see the Word symbol. If you click on the Word symbol, your document opens in Word. Here you can make changes to the document. After making the changes, you must check your document back in.

 This symbol stands for "Check in document". When you press the symbol, the edited document is checked in again.

Now the following window appears. Here you have four options.



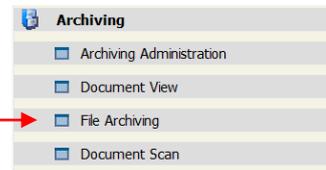
If you have chosen one of the options, the document will now be checked in/archived again.

Now switch back to the archive view. You will notice that two documents have become four documents. The name has been changed from Muster to Mustermann.

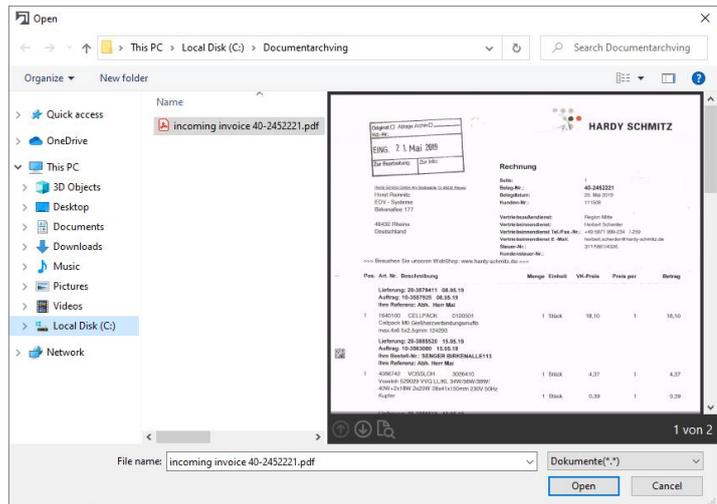
All documents including the checked out/checked in documents are now in the document display.

1.3.2 Document archiving from the file system

To start document archiving for files already stored in the file system, open Novaline Archiving. To do this, select *Novaline Archiving, Document Archiving, Document Storage* of the SAP Business One® menu.

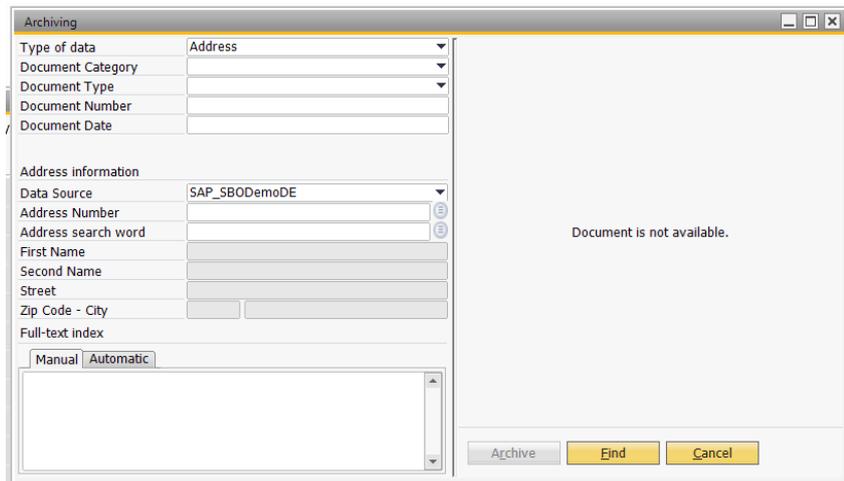


The *Archiving* dialogue opens. Press the *Search* button **Find** in the lower right-hand area. The file browser opens. Select the desired document/file. In the drop-down list in the *File type* field, you can select one of the document types PDF, TIFF, JPEG, BMP, WAV, AVI. These documents are displayed as PDF in the archive dialogue and are also stored accordingly.



Confirm your selection with *Open* **Open**. If you have inadvertently loaded a file that you do not want to archive, select the button *Cancel* **Cancel**. Confirm the following dialogue "Should archiving be terminated and the document discarded" with *Yes* **Yes**.

The dialogue is cleared and you can search for a document from the file system again.



The file name of the file to be archived is also stored in the keyword search.

If you have selected a document for archiving, it is displayed in the right-hand area of the screen.

The screenshot shows the SAP Archiving application interface. On the left, the 'Archiving' form is filled with the following data:

- Type of data: Address
- Document Category: Outgoing documents
- Document Type: Outgoing payment
- Document Number: (empty)
- Document Date: 7/15/2020
- Data Source: SAP_SBODemoDE
- Address Number: C99999
- Address search word: Einmalkunde
- First Name: Einmalkunde
- Second Name: (empty)
- Street: (empty)
- Zip Code - City: (empty)
- Full-text index: Manual Automatic

On the right, a preview of a document is shown, including a header with 'HARDY SCHMITZ' and a table of items with columns for 'Menge', 'Einheit', 'M-Preis', 'Preis per', and 'Betrag'.

In the left-hand area of the screen, the information for retrieving the document is to be entered.

All other formats can also be archived. These are inserted as a link. If you have selected a file with the file extension ".exe", it is pointed out that this will not be executed for security reasons.

The screenshot shows the SAP Archiving application with an error message displayed on the right side:

The document format is not available.
 Dokument : Novaline.Archivierung.exe

The form fields on the left are filled with:

- Type of data: Address
- Document Category: Incoming Documents
- Document Type: Incoming payment
- Document Number: (empty)
- Document Date: 7/15/2020
- Data Source: SAP_SBODemoDE
- Address Number: V10000
- Address search word: Computer Import GmbH
- First Name: Computer Import GmbH
- Second Name: (empty)
- Street: Grünauer Str. 42
- Zip Code - City: 12524 Berlin
- Full-text index: Manual Automatic

In the first field *Data type* select whether you want to archive to the article or to an address.

In the second field *Document type* select the desired designation from the list. Opening the list box again (↵).

In the third field *Document type*, select another designation. Opening the list box again (↵) allows you to correct your selection. This field is mandatory.

If the desired designations are not available under *Document type* and *Document type*, you can define them in the *Document management in the Master data* menu (→Chapter 1.2.4Master data).

The arrow in front of the respective field → *Novaline Archiving* application was started before.

Enter the desired value in the *Document No.* field. The field is limited to 10 characters and allows alphanumeric entries. This information can be used in a later search. This field is an optional field (→).

Enter the date of the voucher under Voucher date. The format is DD.MM.YYYY. This field is mandatory. You get the current date by entering the "*" and confirming your entry with the tab key.

The *Address Source* area lists all previously defined database tables of the selected *data type*. The table defined as the default is already displayed here. However, you can  select another *address source* from the list box. If no selection is available here, please contact your administrator. Important information on this can also be found in Chapter [1.2.3.9 Database](#).

With the data type *Address* selected:

In the *Address Search Word* or *Address Number* area you can access the address master of the table selected under *Address Source*. To do this, press the *Selection*  button. The system branches to the address search. With a double click or via the *Select* button, the  list box  next to the address source.

Article information	
Article source	SAP_SBODemoDE 
Article Number	B10000 
Article key word	Etikettendrucker 
Designation article 1	Etikettendrucker
Designation article 2	
Artikelgruppe	Artikel

With selected data type *Article*

In the *Article Search Word* or *Article Search Word* area, you can access the article master from the table selected under *Address Source*. To do this, press the *Selection*  button. The system branches to the article search. By double-clicking or using the *Select* button,  list box  next to the address source.

If you are working with user-defined fields (-> Chapter [1.2.3.7 User fields](#)), these are displayed below address or item information. Enter the desired criteria here. The values entered here in the user fields can also be used in a later archive search.

In the lower section *Keywords* you can store as much information as you like for a later full text search. To do this, activate the "*Manual*" tab.



If you want to use a string of words as one coherent keyword, please use the following separators: "slash" (/), "hyphen" (-), "full stop" (.), "colon" (:). A "space" or an "underscore" () is not suitable for this purpose. (Example: If you want to store "delivery note no. 4711" as a keyword, then write e.g. "delivery note/no.4711").

When you have made all entries, click on the *Archive*  button . This button is only active if you have filled in all the mandatory fields and selected a document from the file system. The document is printed to the archive. You can now add the next document to  the archive using the *Search* button or exit  the application with *Cancel*.

1.3.3 Document archiving via document scan

In addition to the electronic data you have created and filed the *Document Scan* module gives you the option of using the scanner to archive documents that you receive in the conventional way by post or fax. You can decide in advance whether you want to scan and archive the documents one by one or whether you want to scan all the documents first (batch processing) and then archive them.

Different scan variants are available. You can call these up directly from SAP Business One® document processing or start them from the Novaline Archiv.One application.

1.3.3.1 Scanning via SAP Business One® document processing

The screenshot shows the SAP Document Scan interface. On the left, there are fields for document metadata: Type of data (Address), Document Category (Outgoing documents), Document Type (activity), Document Number (4811), Document Date (6/10/2013), and Scancode. Below this is the address information for 'Büroausstatter Mayer' in Düsseldorf. A full-text index is visible at the bottom left, showing the start of a document with the word 'Mai'. At the bottom, there are buttons for 'Release for user', 'Document Release' (Set), and 'Search Scandocument'.

The main area displays a scanned invoice for 'HARDY SCHMITZ'. The invoice includes a header with 'EING. 21. Mai 2019' and a table of items:

Pos.	Art. Nr.	Beschreibung	Menge	Einheit	VK-Preis	Preis per	Betrag
		Lieferung: 20-3879411 08.05.19 Auftrag: 10-3557925 08.05.19 Ihre Referenz: Abh. Herr Mai					
1	1640100	CELLPACK 0120501 Cellpack M0 Gießharzverbindungsmaße max. 4x8 5x2 5qmm 124293	1	Stück	18,10	1	18,10
		Lieferung: 20-3885520 15.05.19 Auftrag: 10-3563080 15.05.19 Ihre Bestell-Nr.: SENGER BIRKENALLE113 Ihre Referenz: Abh. Herr Mai					
1	4086742	VOSSL0H 3026410 Vossloh S29029 VVG LL/KL 34W/38W/ 40W+2x18W 2x20W 28x41x150mm 230V 50Hz Kupfer	1	Stück	4,37	1	4,37
		Lieferung: 20-3885519 15.05.19 Auftrag: 10-3563098 15.05.19 Ihre Bestell-Nr.: SENGER BIRKENALLE113 Ihre Referenz: Abh. Herr Mai					
1	4086742	VOSSL0H 3026410 Vossloh S29029 VVG LL/KL 34W/38W/ 40W+2x18W 2x20W 28x41x150mm 230V 50Hz Kupfer	1	Stück	4,37	1	4,37
		Lieferung: 20-3885519 15.05.19 Auftrag: 10-3563098 15.05.19 Ihre Bestell-Nr.: SENGER BIRKENALLE113 Ihre Referenz: Abh. Herr Mai					
1	4086742	VOSSL0H 3026410 Vossloh S29029 VVG LL/KL 34W/38W/ 40W+2x18W 2x20W 28x41x150mm 230V 50Hz Kupfer	1	Stück	0,39	1	0,39

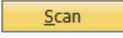
At the bottom of the interface, there is a 'Profiles to scan' dropdown menu and buttons for 'Scan', 'Archive', 'Update', and 'Cancel'.

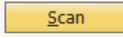
The scan module is anchored in the sales and purchasing documents. The scan process is called up from the corresponding dialogue window. For example, if you want to post a goods receipt, open the *Goods Receipt (Purchase Order)* dialogue from the *Purchasing* menu. In the lower dialogue area you will find the button *Scan*. As soon as you press this button, the individual document data such as document category, document type, document date, document number, address number are automatically inserted into the scan form.

Select the desired scan profile in the right-hand area of the screen. You can do this via the list box in the *Scan profiles* field. If you want to create a new scan profile, press the button with the arrow.

For more information on addition a profile, see chapter [1.2.3.3 Document scan](#).

The arrow in front of the respective field  enables a correction of the current profile or a new addition.

Then press the *Scan*  button. The document is scanned and taking your scan profile into account. Your document is displayed in a thumbnail bar. There is no branching to your scan programme.

If you do not use a scan profile, press the *Scan*  button directly. The system connects to your scan program. Scan your document. As soon as the document has been scanned, the scan program is closed and you return to the *document scan* module.

In the left-hand area add your relevant entries, such as user-defined fields and keywords for your document. Select the document by **double-clicking on it** and confirm by clicking on the button *File* . The document is now filed with the filing criteria you have entered. Double-click to activate and select the document. It is also displayed enlarged and marked for filing at the same time. The document gets a turquoise frame. If several pages are filed for one address, the respective pages must be selected one after the other by double-clicking. The pages that have already been marked for filing receive a red frame in the thumbnail view.

If you have set an automatic document selection in your basic settings, all documents that you scan are automatically marked with a red frame and thus marked for filing. You can remove a mark for filing by double-clicking on the pictogram again. The frame disappears.

If you press the  *Set* button when releasing a document, you can release the document to other users.

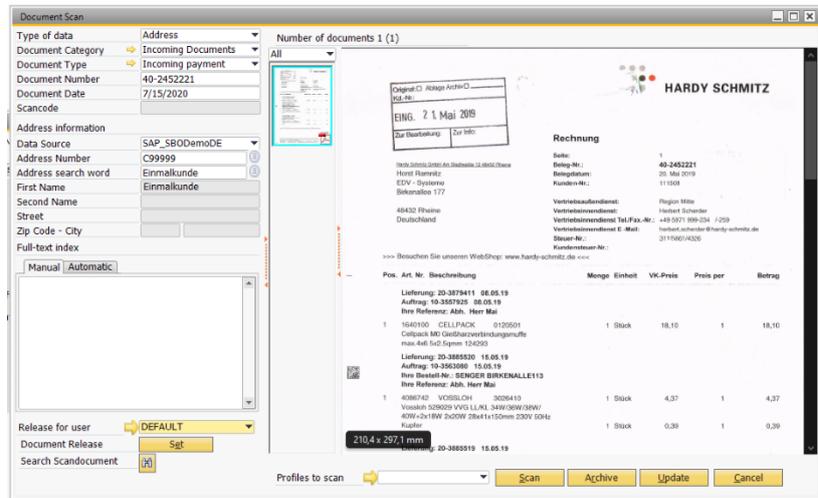
If you click on this symbol  ([Archive - Document search](#)).



After scanning a document, the entered document number, address number, address name and file name are integrated into the full text search and can thus also be searched for.

1.3.3.2 Scanning via the Novaline Archiving application

Start the scan module of Archiv.One via *Start, All Programs, Novaline Software, Novaline Archiving, Document Scan*. You can also start Novaline Archiving directly from SAP Business One®. To do this, select *Archiving, Document Scan* in the SAP main menu. Archiving is started. A separate dialogue for scanning opens up.



In the left-hand area you enter the criteria and information relevant for archiving and later research. In the right-hand area, the scanned documents are displayed in thumbnail view and the respective selected document is shown in enlarged view.

Select the desired scan profile in the right-hand area of the screen. You can do this via the list box in the *Scan profile* field. If you want to create a new scan profile, press the button with the arrow ➡.

For more information on addition a profile, see chapter [1.2.3.3 Document scan](#).

Then press the *Scan* button. The document is scanned and taking your scan profile into account. Your document is displayed as a pictogram in a miniature bar. There is no branching into a scan programme.

If you do not use a scan profile, press the *Scan* button directly. The system branches to your installed scan programme. Scan your document. As soon as the document has been scanned, the scan programme is closed and you return to the *document scan* module.

In the left-hand area select the filing and search criteria, assign keywords to find your document again. Select the document by **double-clicking on it** and confirm the button *File* . The document is now filed with the filing criteria you have set. The *File* button is only active when all mandatory fields have been selected and the desired document has been marked.

You can also scan all your documents first and then assign the scanned documents to the desired addresses and file them. To do this, you can press the *Scan* button again.

Scan the next document and this also displayed as a pictogram now.

Follow this procedure until all documents have been scanned.

To mark the scanned documents for filing proceed as follows:



With a simple left mouse click, you activate the document for enlarged display in image format so that you can view its contents. The document gets a blue frame in the thumbnail view.

Double-click to activate the document for enlarged display **and** mark it for filing. The document gets a turquoise frame.

If several pages are filed for one address, the respective pages must be selected one after the other by double-clicking. The pages that have already been marked for filing are shown with a red frame in the thumbnail view.

If you have set an automatic document selection in your basic settings, all documents that you scan are automatically marked with a red frame and thus marked for filing.

You can remove a mark for filing by double-clicking on the pictogram again. The frame disappears.

You can delete a scanned document by right-clicking on its thumbnail. You will be asked whether you want to delete the scanned document. If the query is confirmed Yes, the document is deleted from the scan directory.

In the left-hand area you define the storage and search criteria for your documents. The information you select here, especially the address/article name, is entered for **all** marked documents. If you first want to scan all documents and then archive each one individually, please make sure that you have only ever marked the desired document(s) which also belong(s) to the criteria and information selected in the left-hand area.

In the *Data Type* field, select the desired value from the list box. This field is mandatory.

Type of data	Article
Document Category	Address
Document Type	Article
Document Number	Folder
Document Date	

In the *Document Category* field, select the desired value from the list box. This field is mandatory.

Document Category	→ Outgoing documents
Document Type	Digital personnel office
Document Number	Incoming Documents
Document Date	Incoming e-mail
Scancode	Incoming fax
Address information	Internal documents
	Outgoing documents

Select the desired document type in the field of the same name. This field is mandatory.

Document Type	→ Sales Quotation
Document Number	
Document Date	Incoming payment
Scancode	Outgoing payment
Address information	Sales Order
	Sales Quotation

If the desired designations are not available under *Document category* and *Document type*, you can define them in the *Master data* menu (→Chapter [1.2.4Master data](#)).

The arrow in front of the respective field → *Novaline Archiving* application was started before.

Under *Address Source*, select the desired database that contains the corresponding address information for the document. Your stored standard database is already suggested here. If you want to access a database other than the one suggested, select the desired database via the list box.

Address information	
Data Source	SAP_SBODemoDE
Address Number	
Address search word	SAP_SBODemoDE

Address selection in the *Data Type* field:

In the *Address Number* or *Address Search Word* field, click the *Select*  button . The address browser is displayed. Select the desired address. The address data is assigned to the document to be scanned. If you know the address number, you can also enter it directly and confirm with the TAB or Enter key. The data is then read out directly. When you enter a search word, pressing the TAB or Enter key branches to the address browser. The cursor positions itself at the first place that has a match in the database.

Select *item* in the field *Data type*:

In the *Article number* or *Article search word* field, click on the *Selection*  button. The address browser is displayed. Select the desired item. The item data is assigned to the document to be scanned.

In the lower area keywords can be entered as search criteria. You can enter as many keywords as you like here.

If possible choose names that refer to the document context. This will make it much easier to search for documents later.

After selecting and entering all criteria, confirm the button *File*  . The scanned document is stored in the Novaline database. This button is only active when you have marked at least one document for storage.

As soon as the document is archived, it is removed from the temporary directory. The document is marked with a green tick in the thumbnail view. The next time you open the dialogue or the *Refresh* button is  pressed, the thumbnail is cleaned up.



The orientation of the scanned documents can be corrected using the toolbar on the right-hand side of the screen.

-  this button saves the document externally
-  this button prints the document on an external printer
-  This button adds a comment you want to the document.
-  This button adds a stamp of your choice (Booked, Received...), Paid) added
-  With this button you can show or hide the comments
-  With this button you can move the comments to the comment bar
-  With these two buttons you can expand and collapse the comments
-  this button adjusts the image to the dialogue size
-  this button zooms the picture to original size
-  manual zoom in +

 manual zoom out -

 Left rotation 90

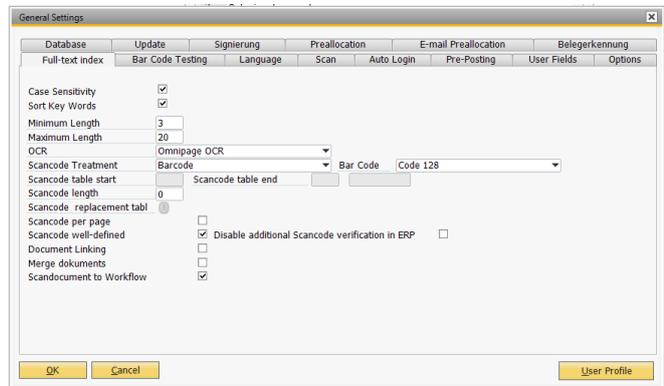
 Clockwise rotation 90

The document can also be enlarged/reduced with the help of the mouse wheel.

 An automatic document selection can be keyed in the *General Settings* (→Chapter [1.23.3 Document Scan](#)).

1.3.3.3 OCR text recognition

The OCR module "Omnipage OCR recognition" is used for OCR (→) recognition. In order to be able to use this module within Novaline Archiving, the settings must be adjusted accordingly. Select *Administration* and *General Settings* in the main menu. Switch to the *Full Text Keywords* tab.



Select the entry *Omnipage OCR* from the drop-down list *Text Recognition (OCR)*. Confirm your entries with *Update*  and then with *OK*.

Text recognition is active within the Scan module. Select *Archiving* and *Document Scan in* the main menu. Scan the desired documents. As soon as you activate a document for archiving (double-click), OCR text recognition becomes active. The keywords are stored within the *Automatic* tab.

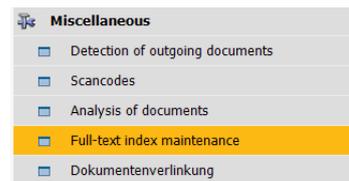
If the marking for filing a document is removed or the document is deleted from the list, all keywords of this document are removed.



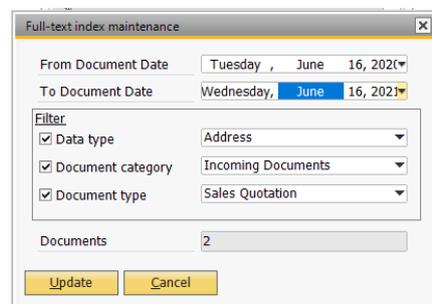
For more on OCR text recognition, see Chapter [1.3.3OCR text recognition](#).

1.3.3.4 Subsequent full text maintenance

You can use the archiving menu to subsequently maintain the full text.



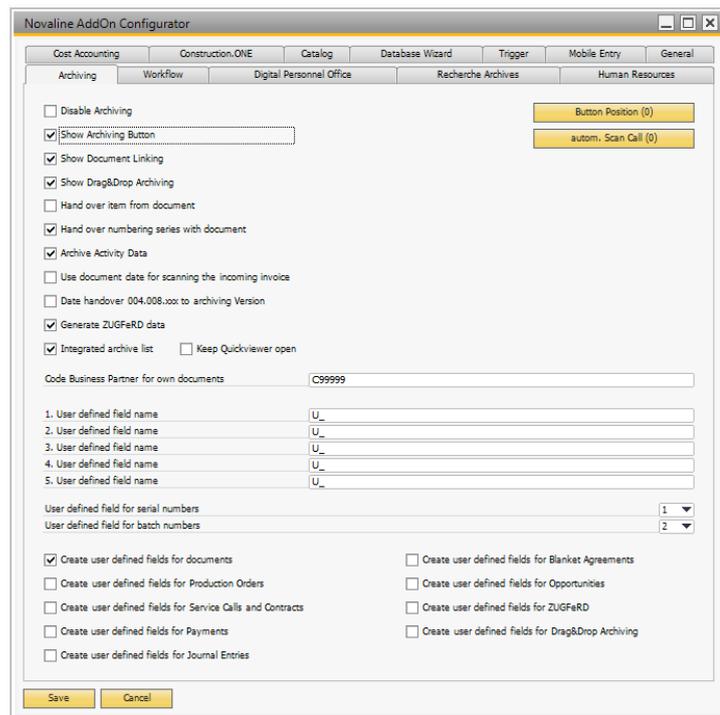
You can select between "from" and "to" - document date and the associated data types, document categories and the document types. The full text is automatically carried out on the selected options.



1.3.3.5 Scancode - Automatic scanning process

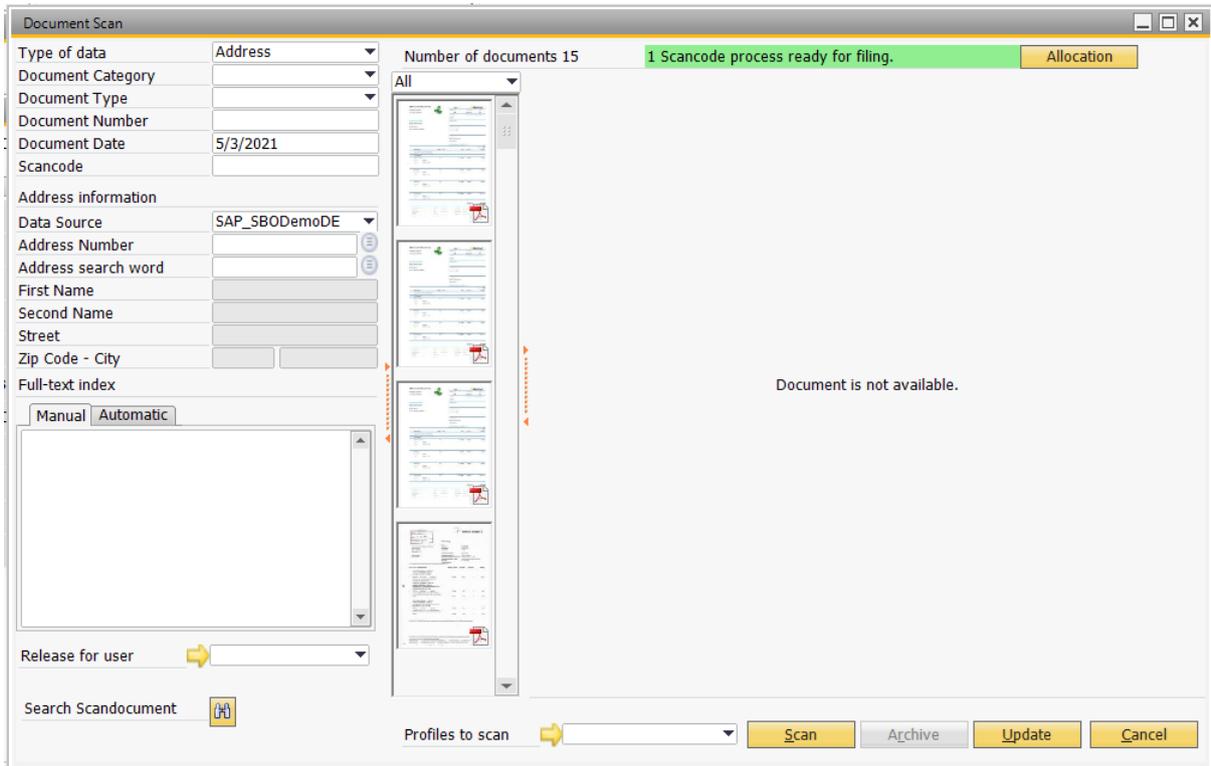
The scan code is used to automate the scanning process. For the setup, the scancode has to be defined in the *General Settings* (-> chapter 1.2.4.3 [Keywording](#)). In order to work with the Business One documents, the user-defined fields for documents have to be created in the "Novaline Add One Configurator". See chapter 3 [AddOn Configurator](#)

Before you can start, you should have set the scan code. Print out the scancode as labels and stick them on the incoming documents.

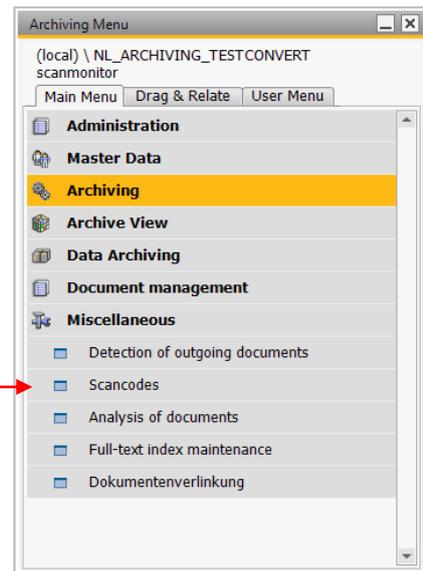


You have two options for an automatic scan:

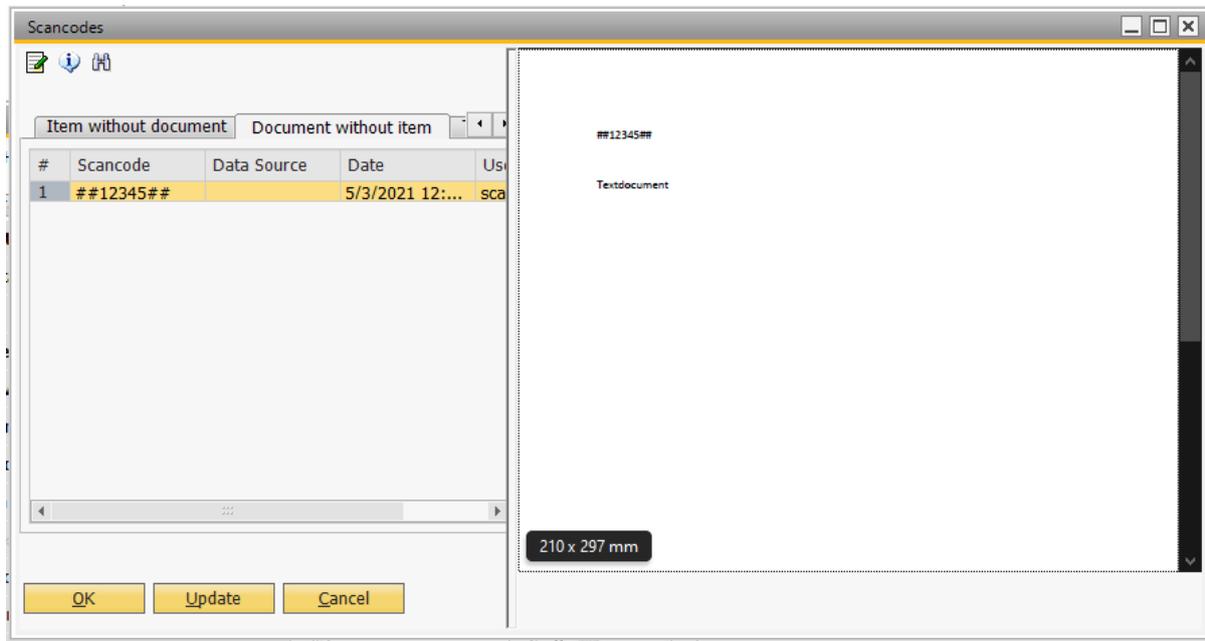
1. Before processing the incoming documents are scanned in BO, e.g. in a batch. After the scanning process the OCR text recognition starts and checks whether a scancode label is available.
 - a. If the scan code could not be recognised or is not available, the document appears in the browser according to the conventional procedure and can now be assigned manually.
 - b. If the scancode could be recognised, then it will be checked whether there is already a BO voucher for it that has the identical scancode stored in the user-defined field.
 - i. If yes, a message appears in the upper right area of the screen that a scancode process is ready for filing. If you click on the button *Assignment*, Allocation the scanned document is assigned to the BO document. An automatic indexing, full text indexing and archiving of the document takes place.



If no, the scanned document is temporarily parked and waits for a BO document that is assigned the identical scan code in the user-defined field. The temporarily parked documents can be found in the main menu of the archiving under *Miscellaneous, Scancodes*.

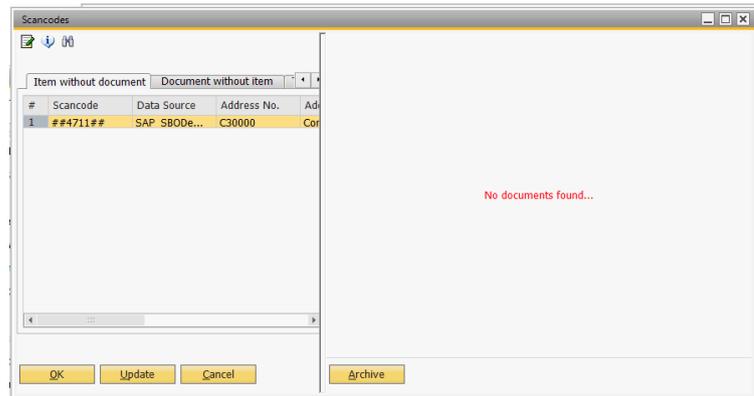


In the *Scancodes* dialogue switch to the tab *Document without entry*. All scanned vouchers are shown here. The document selected by mouse click on the left side of the screen is displayed on the right. You can also select several documents under "Document without entry" and change the scancode for them. You can delete an entry by selecting the corresponding entry and clicking on the Delete button  on the icon bar.



2. The incoming vouchers are first processed in BO, collected and then scanned in a batch. During document entry, the user-defined field *Scancode* *must be* filled with the scancode number (prefix (->) and suffix (->) (e.g. ##) are not to be entered). As soon as you press the *Add*  or *Update*  button in the BO document, Novaline Archiving checks whether the *Scancode* field exists and whether this field has been filled:
 - a. If this is not the case, only the document is saved in the BO database and the document is archived in the Novaline database.
 - b. If this is the case, the document is saved in the BO database. The document is archived. The system checks whether there is already a scanned document in the temporary directory for the scan code.
 - i. If yes, the document from the temporary directory is automatically provided with the values from the current BO document and automatically archived. These are *document category*, *document type*, *document number*, *document date*, *BP number*, *BP search word* and the *address*.
 - ii. If no, the scancode is temporarily buffered with the document criteria such as *BP number*, *BP search word*, *document number*, *document type* and *document date*. The temporarily buffered information can be found in the archiving main menu under *Miscellaneous*, *Scancodes*.

In the dialogue *Scancodes* switch to the tab *Entry without receipt*. All scancodes entered in BO are listed here. You can delete an entry by marking the corresponding entry and selecting the button *Delete* from the icon bar.



The *Refresh* button checks for new entries and updates the screen display.

The *Archive* button on the right-hand side of the screen offers you a preselected search for all archived documents of the selected address.

You using this button.

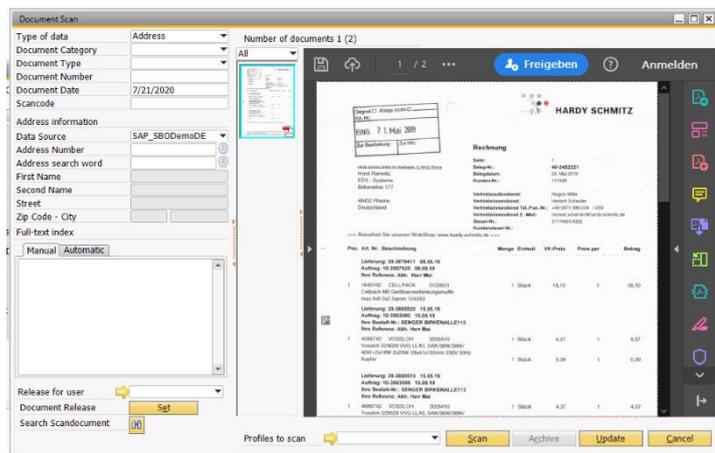


For sheet separation "\$\$END\$\$" has been integrated.

"\$\$END\$\$" can also be used for the barcode type "Code 39".

This procedure is recommended in conjunction with barcode type Code 39 of Novaline.

If the scancode is not recognised by the OCR text recognition when scanning the document, you have the option of entering the scancode manually and saving the document as a document with a scancode. Double-click on the scanned document and enter the corresponding scancode number in the *Scancode* field.

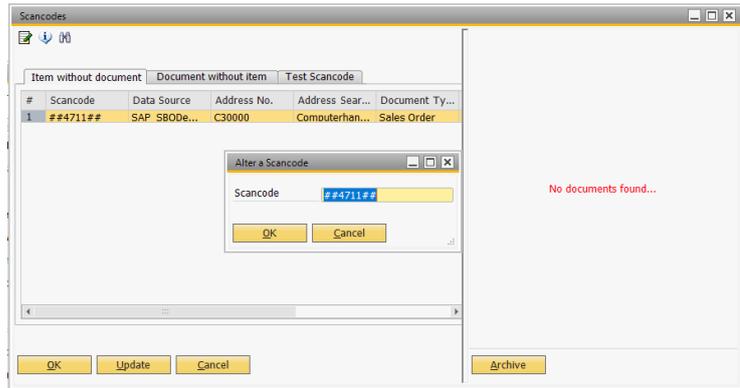


Confirm the following dialogue whether this document should be saved as a scancode document with *Yes*.



The automatic assignment is cancelled as soon as you describe one of the other index fields.

If an incorrect scancode was detected during OCR text recognition, or if an incorrect scancode was entered in BO, it can be changed subsequently in the *Scancodes* dialogue. Select *Other, Scancodes* from the main archiving menu. Select the desired entry on the tab *Entry without document* or *Document without entry*. Press the button to change the scan code.



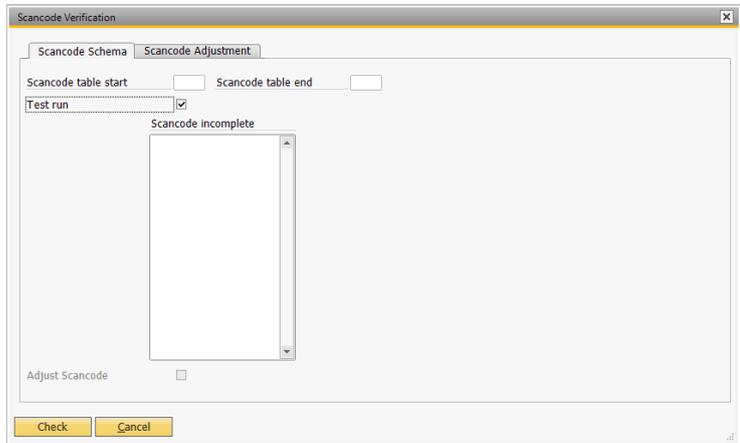
Make the correction and confirm with *Update* and *OK*.

This button stands for "Scancode check". When you press the button, the "Scancode check" window opens.

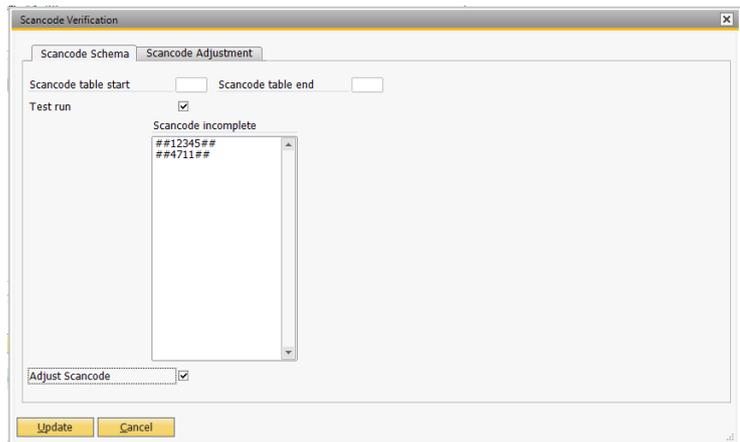
After you have activated the checkbox at "Check run", you can now click on "Check".

OK" is now "Check".

If there are incomplete scancodes, they are listed in the white field under "Scancode incomplete".

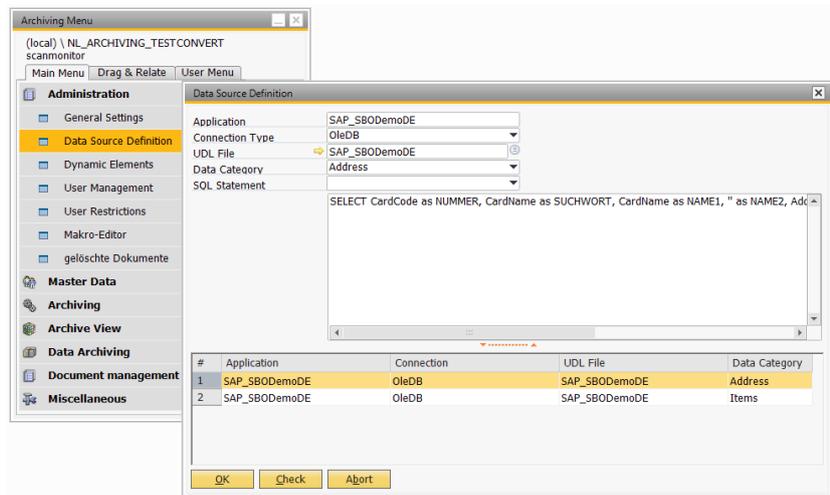


If you activate the checkbox at "Correct scan code" and then click . The "incomplete scan codes" are automatically corrected.



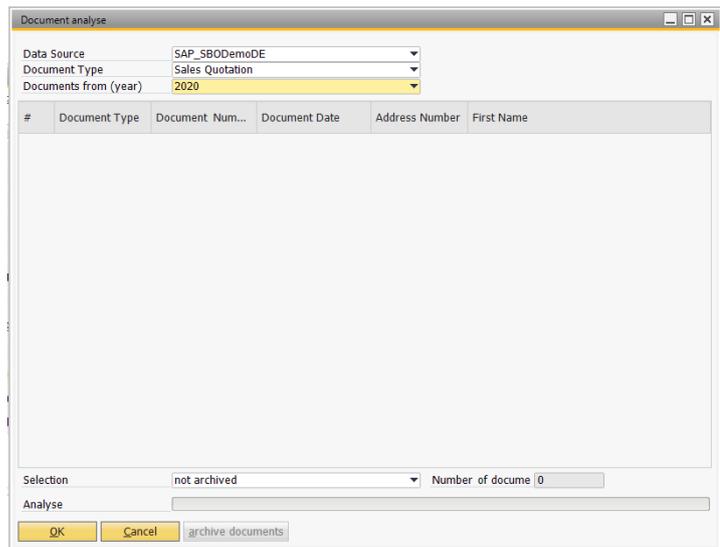
1.3.3.6 Document analysis

To be able to use the document analysis you must add a new data source. To do this, please proceed as follows. Under Administration you will find the selection "Data source definition".



After you have entered the application and the UDL name (here you can use the same UDL name as for the other definitions), select "Documents" as the data type. The SQL Select statement must also be selected. Then click on Add and OK.

The document analysis is a help tool and is meant to view "not archived", "complete" and "archived" documents from SAP BO. To do this, you must first select the address source (the address source must be selected for each analysis) and then the document type. Three options are available (not archived, archived and complete).



The result of the document analysis is displayed in the preview and can be printed or exported to Word and Excel.

Document analyse

Data Source: SAP_SBODemoDE
 Document Type: Sales Order
 Documents from (year): 2016

#	Document Type	Document Num...	Document Date	Address Number	First Name
1	Sales Order	756	1/2/2016	C60000	SG Elektronik
2	Sales Order	739	1/4/2016	C20000	PC Welt GmbH & Co.KG
3	Sales Order	753	1/7/2016	C42000	CIT Beratungshaus
4	Sales Order	757	1/8/2016	C60000	SG Elektronik
5	Sales Order	762	1/9/2016	C99999	Einmalkunde
6	Sales Order	765	1/9/2016	L10001	Andreas Ackermann
7	Sales Order	744	1/10/2016	C25000	Büro Online AG
8	Sales Order	747	1/11/2016	C26000	Büro Ausstattung Namyslo GmbH
9	Sales Order	750	1/11/2016	C40000	Büroausstatter Mayer
10	Sales Order	767	1/11/2016	L10002	Werner Richter
11	Sales Order	761	1/12/2016	C99998	Web Einmalkunde
12	Sales Order	743	1/13/2016	C25000	Büro Online AG
13	Sales Order	740	1/15/2016	C20000	PC Welt GmbH & Co.KG
14	Sales Order	758	1/15/2016	C70000	Broup Inc.
15	Sales Order	754	1/16/2016	C50000	INTINT, Inc
16	Sales Order	745	1/17/2016	C26000	Büro Ausstattung Namyslo GmbH
17	Sales Order	766	1/17/2016	L10002	Werner Richter
18	Sales Order	764	1/18/2016	L10001	Andreas Ackermann
19	Sales Order	752	1/19/2016	C42000	CIT Beratungshaus
20	Sales Order	755	1/19/2016	C50000	INTINT, Inc
21	Sales Order	741	1/20/2016	C23900	Mikrochips GmbH

Selection: not archived Number of docum: 226

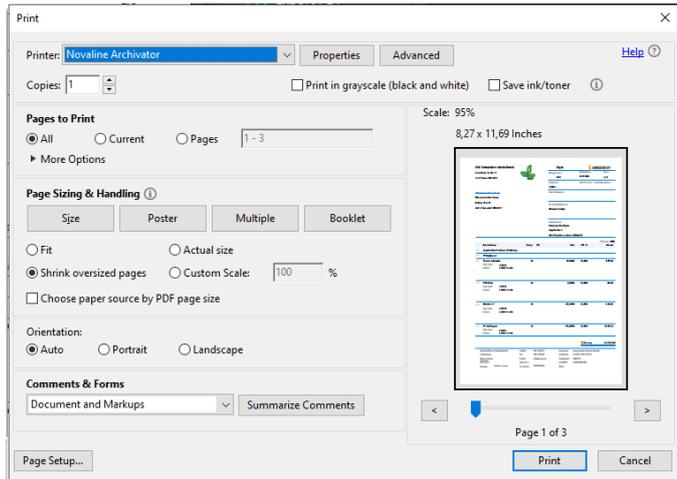
Analyse: _____

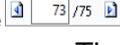
OK Cancel archive documents

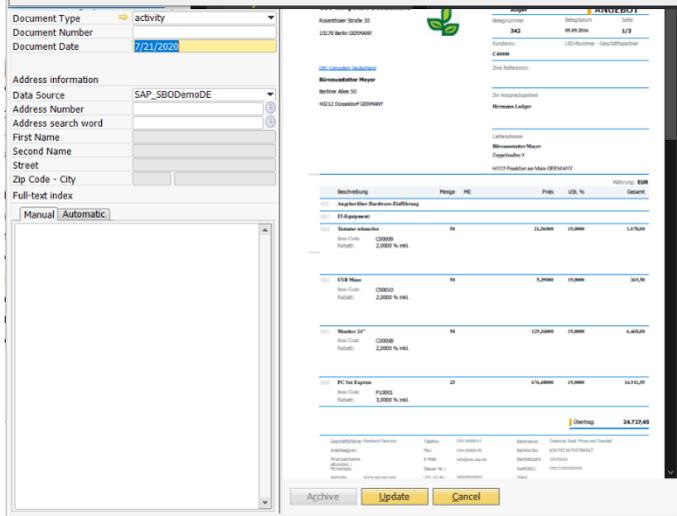
1.3.4 Document archiving from Windows programmes

Archiving from Windows programmes enables documents to be archived of all programmes that provide a print dialogue. For example, Word documents, Excel sheets, e-mails, project plans, drawings, etc. can be stored in the Novaline archive. With free archiving you have access to the address or article databases. This means that the document can be assigned to a desired address or article. In the entire configuration this guarantees a complete archive with related data and prevents media discontinuity.

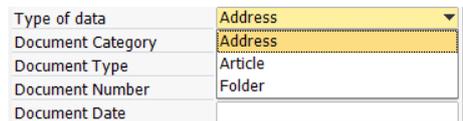
Call up the document to be archived in the programme in which it was created. Select the *Print* command. Activate the *Novaline Archivator* printer in the print dialogue. Carry out the other printer settings. (number of pages, print options etc.). If only a part of the document is printed, only this part is archived. As soon as you have confirmed the print dialogue with *Print* , the archiving dialogue opens.



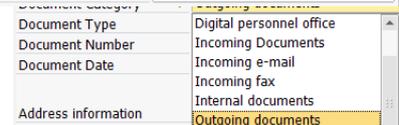
Use this dialogue to control the storage criteria for the document to be archived. In the left-hand area you change the settings. In the right-hand area the document is displayed. If the document consists of several pages, you can scroll page by page  using the navigation buttons. The button *previous*  jumps back one page and *next*  jumps forward one page. If you click on the icon  the document pages are displayed as a thumbnail next to the document. Clicking the mouse displays the corresponding page.



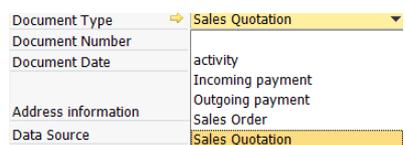
In the *Data Type* field select the  desired value of the list box. This field is mandatory.



In the *Document Category* field select the  desired value of the list box. This field is mandatory.



Select the desired document type in the field of the same name. This field is mandatory.



If the desired designations are not available under *Document category* and *Document type*, you can define them in the *Master data* menu within Novaline Archiving (→Chapter [1.2.4 Master data](#)).

The arrow in front of the respective field ➔ you need for a correction or an addition when *Novaline Archiving* application was started before.

Under *Address Source* select the desired database that contains the address information for the document. Your stored default database is already suggested here. If you want to access a database other than the one suggested, select the desired database of the list box.

Address information	
Data Source	SAP_SBODemoDE
Address Number	
Address search word	SAP_SBODemoDE

Address selection in the Data Type field:

In the *Address Number* or *Address Search Word* field click the *Select*  button . The address browser is displayed. Select the desired address. The address data is assigned to the scanned document. If you know the address number, you can also enter it directly and confirm with the TAB or Enter key. The data is read out directly. When you enter a search word, pressing the TAB or Enter key you see the address browser. The cursor positions itself at the first place when it has a match in the database.

Select Article in the field Data type:

In the *Article number* or *Article search word* field click on the *Selection*  button. The address browser is displayed. Select the desired item. The item data is assigned to the document to be scanned.

In the lower area keywords are automatically assigned as search criteria. You can add them *manually* on the index card. If it is possible choose names that relate to the document context. This makes it much easier to search for documents later.

When you have made all the entries, click on the *Archive*  button. The document is printed to the archive.



If there is no licence for the extended workstation in the archiving, the Novaline Archivator is configured so that no PDF file is created and the filing is not started. This procedure is only active when printing directly to the Novaline Archivator (without a licence for the extended workstation).

1.3.5 E-mail archiving

E-mail archiving can be found in the main menu of Novaline Archiving under the entry *Archiving, E-mail archiving*.

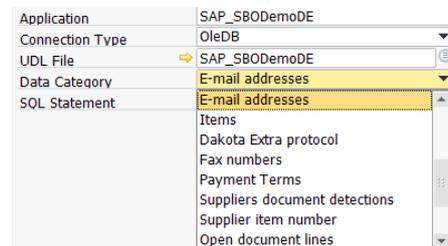
E-mail archiving reads the e-mails from your e-mail box. Requirements are Microsoft Office, version 2000 or higher.

Before you can start archiving e-mails, you must first create a data link between e-mail archiving and the Business One database.

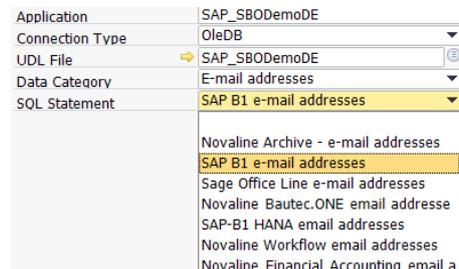
In the main menu select *Administration, Data Source Definition*. The *Data Source Definition* dialogue opens. Enter the name of your Business One database in the *Application* field. The value **SAP_** must be entered before the name (-> Chapter 1.2.1 [Data source definition](#)).

In the *UDL Name* field use the button  to select the already existing UDL (e.g. SAP_SBODemoDE).

In the *Data Type* field select *Email Addresses*.



In the *SQL select statement* field select *SAP-B1 email addresses*. The select statement is copied in. Now press the **Add**  button, then **Cancel**  and **OK** .

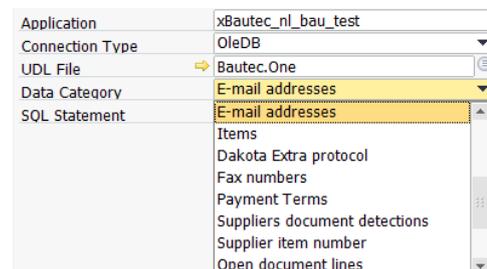


The data link is set. You can now open the e-mail archiving.



If you also use our Construction.One software, you can use the e-mail archiving function too. Proceed as follows:

The application field must begin with "xBautec". Please pay attention to upper and lower case. You can select a name like the UDL name. Select "E-mail addresses" as data type.

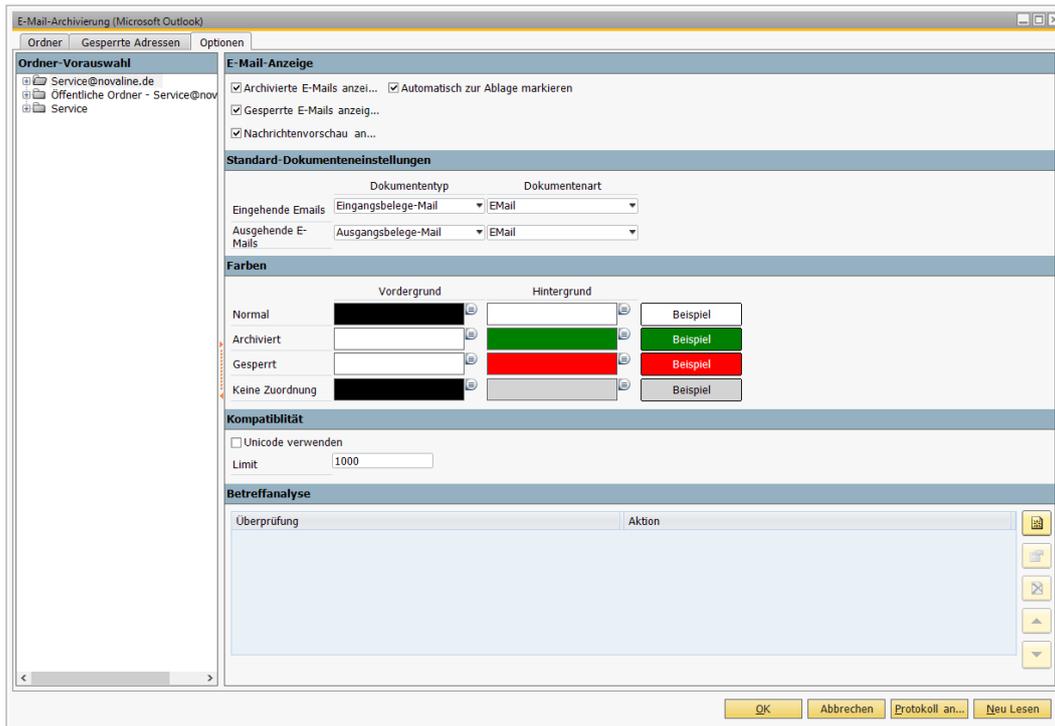


Under Select Instructions please select the Novaline Bautec.ONE email addresses listed.

Application	xBautec_nl_bau_test
Connection Type	OleDB
UDL File	Bautec.One
Data Category	E-mail addresses
SQL Statement	Novaline Bautec.ONE email address

Novaline Archive - e-mail addresses
SAP B1 e-mail addresses
Sage Office Line e-mail addresses
Novaline Bautec.ONE email address

In order to use the e-mail archiving with connection to Construction.One. E-mail addresses must be stored under business partners.



The first time you start e-mail archiving, the *Options* tab opens. Here you make your basic settings. All e-mail items from Outlook are listed on the left-handed side of the screen. With a right mouse click on the desired folder select *Inbox* or *Outbox* in the context menu. This folder is active for import into the archive then. Subdirectories must be activated separately.

In the right-hand area you can change settings for the view and the Outlook version. You can show emails that have already been archived by selecting the checkbox *Show archived emails*. You need to activate the checkbox.

You can show blocked e-mail addresses via the checkbox *Show blocked e-mails*. You need to activate the checkbox. To show message previews, you can activate the checkbox *Show message previews*. You need to activate the checkbox.

E-Mail-Anzeige	
<input checked="" type="checkbox"/>	Archivierte E-Mails anzeigen...
<input checked="" type="checkbox"/>	Gesperrte E-Mails anzeigen...
<input checked="" type="checkbox"/>	Nachrichtenvorschau anzeigen...

Standard-Dokumenteneinstellungen

	Dokumententyp	Dokumentenart
Eingehende Emails	Eingangsbelege-Mail	Email
Ausgehende E-Mails	Ausgangsbelege-Mail	Email

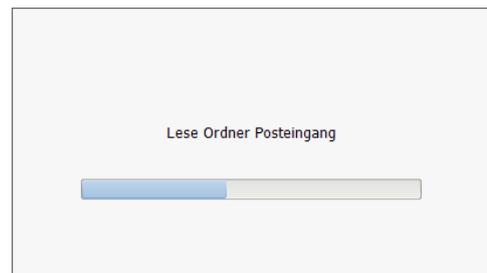
In the *Default Document Settings* area set a default value for indexing. Select the default document category and the default document type for incoming and outgoing e-mails of the drop-down list.

For better differentiation of the read-in e-mails you can select different colours for the display in the *Colours* area. Under *Normal* all emails are listed that can be assigned and archived. All emails that have already been archived are listed under *Archived*. Under *Blocked* all e-mail addresses are listed that have been blocked for archiving by the user. Under *No allocation* all e-mails are listed that do not match the sender address in the master data of the BO database.

Farben

	Vordergrund	Hintergrund	
Normal			Beispiel
Archiviert			Beispiel
Gesperrt			Beispiel
Keine Zuordnung			Beispiel

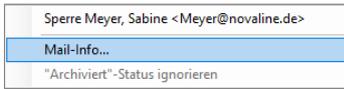
Save your settings with the *Update* **Aktualisieren** button. When reading-in for the first time, press the button **Neu Lesen**. All e-mails of your e-mail inbox that are in the previously selected directories are read.



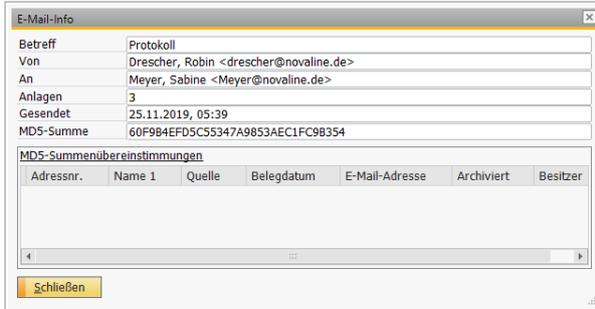
After that the e-mails are read-in.

The screenshot shows the 'E-Mail-Archivierung (Microsoft Outlook)' window. The 'Ordner' tab is selected, displaying a tree view of folders on the left and a table of emails in the center. The table has columns for 'Archiviert', 'Ges...', 'Zuordnung', 'Dokumenten...', and 'Dokumenten...'. The 'Vorschau' pane at the bottom shows a preview of an email from NOVALINE, including the company logo and contact information for Robin Drescher.

A change to the *Folder* tab takes place. All read e-mails are now displayed here. On the left-hand side you will find all the folders of Microsoft Outlook. The folders activated on the *Options* tab are also activated here. If other Outlook items are to be used for archiving, right-click on the corresponding folder and select *Inbox* or *Outbox* of the context menu. Only the e-mails that are to be read from the folders via the checkbox are displayed. All other e-mails are not displayed here. Using the colours defined under *Options*, the e-mails are marked accordingly. The button *New read* **Neu Lesen** updates the view.



In this dialogue you can check which emails with the same hash code already exist in the archive; you can view them directly using the yellow arrow.



Option "Ignore archived status" in the context menu of the mail grid: If an e-mail is marked as already archived this status can be ignored with the above option in order to archive this e-mail (again). After archiving this e-mail or clicking on "Read again", this setting resets.

In the first column *Archive* the checkboxes are automatically set if an assignment has taken place, i.e. if the e-mail address of the sender (for incoming e-mails) or the recipient (for outgoing e-mails) could be found in the BO database. You can cancel the automatic selection at any time with a mouse click on the checkbox.



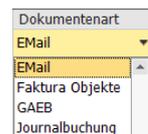
In the second column *Archived* the checkboxes are automatically set as soon as the emails have been archived. A manual deactivation is not possible.



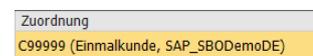
In the third column *Blocked* the checkboxes are automatically set if addresses have been blocked for archiving by the user. These emails are not archived.



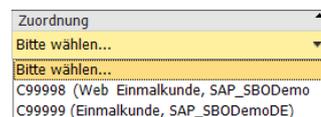
In the column *Document type* the selected document type under *Options* is suggested. If you click in the list box  the selection list opens and you can select another one.



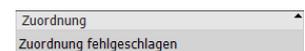
The Business One addresses whose e-mail address matches the SMTP address of the e-mail are displayed in the *Mapping* column.



If several addresses exist for an e-mail address, all addresses are displayed in the selection list. By clicking on the list box  the list is expanded and you can select accordingly.



If there is no match, the message *Assignment failed* appears. The button  opens the address browser. Here you can select and assign the desired address from the BO database.



The columns *Recipient* and *Sender* show the recipient or the sender with the corresponding SMTP address. The subject line of the e-mail is displayed in the *Subject* column. The number of e-mail attachments is shown in the *Attachments* column. The attachments are stored in the database in their original format.



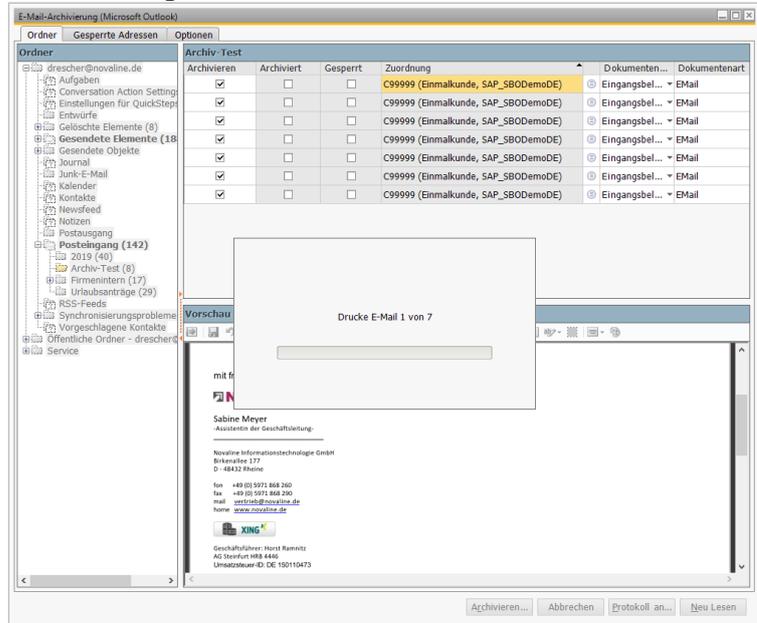
You can add new folders or remove already activated folders at any time. Switch to the *Folders* tab and change your settings. Then press the button *Update* **Aktualisieren** and *Read in again* **Neu Lesen**.

Press the *Archive* **Archivieren...** button. The entries marked for archiving are automatically stored in the Novaline archive database under the assigned name of the SBO database.

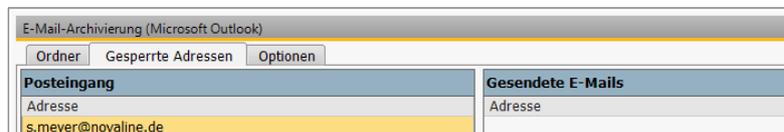
A log lists all e-mail entries that could not be assigned. Press the button **Protokoll an...** *Show log*.

You can lock addresses for archiving by selecting an entry from the list with the right mouse button (context menu).

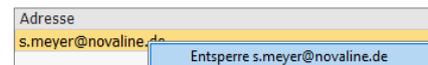
You can find an overview of all - blocked addresses on the *Blocked Addresses* tab.



The sender addresses of the received e-mails are listed in the left-hand area. The recipient addresses of the sent e-mails are listed in the right-hand area.



You can unblock a blocked address by clicking on a blocked entry with the right mouse button (context menu).



1.3.6 Stationery

If you also want to archive your stationery, which you print on during physical printing, this must be defined in the PDF mailer and this file must then be stored within Novaline archiving.

Open the PDF mailer via *Start, Programs, gotomaxx, MAXXPDFMAILER*. of the *Settings* menu, select the *Edit...* command. Then switch to the *Letterhead* tab. Define your stationery here. The name you enter in the *Stationery* field should also be entered in Novaline Archiving. You can start the administration and switch from the main menu to the *general settings*. Next switch to the *Options* tab.

Enter the designation from MAXXPDFMAILER in the field *Letterhead for document types*. The stationery is now stored for each archiving process from Business One.

If you also want to archive stationery from other Windows programmes, enter the stationery name in the field *Stationery for external documents*. You find it on the *Options* tab too.

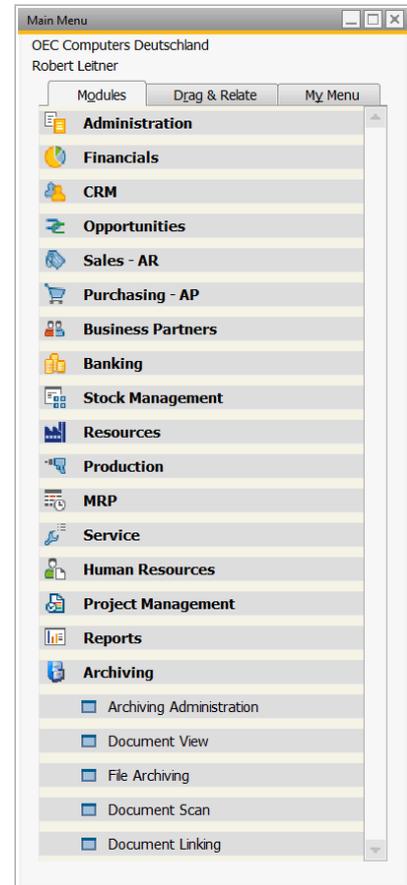
1.4 Archive - Document research

1.4.1 Archive search

You have two options for viewing the archived documents. You can view the contextual documents in the respective SAP Business One® dialogues via the *Archive*  button.

Example: You select the *Sales* area and open the *Offer* dialogue. Click on the *Archive* button in the lower screen dialogue. All offers are displayed. If you select a customer beforehand and then open the archive. All offers of this customer are displayed.

For an overall search you can also switch directly to the overall archive via the menu. Please select *Novaline Archiving, Document View* of the SAP Business One® main menu.



The document search is opened. In this dialogue you can enter several search criteria. If you do not make any entries, all archived documents are displayed.

In the *search method* use the radio button (→) to select *All input values must...be present* and *Only one of the input values must...be present*. These options refer to the values to be entered below.

If the search is not limited, longer waiting times may occur depending on the archive size.

In the *Data type* field select the desired value from the list box.

Type of data	Address
Document Category	Address
Document Type	Article
Document Number	Folder

In the *Document Category* field select the desired value from the list box.

Document Category	Incoming Documents
Document Type	Digital personnel office
Document Number	Incoming Documents
Document Date	Incoming e-mail
Scancode	Incoming fax
Address information	Internal documents
Data Source	Outgoing documents
Address Number	Outgoing e-mail
	Outgoing fax

Select the desired document type in the field of the same name.

Document Type	Incoming payment
Document Number	
Document Date	A/P Credit Note
Scancode	A/P Down Payment Invoice
	A/P Down Payment Request
Address information	A/P Invoice
Data Source	A/R Invoice
Address Number	activity
Address search word	EKT-Order
First Name	EKT-Quotation
Second Name	Goods Return
Street	Incoming payment

If you are looking for all documents linked to addresses / articles of a specific database, select the - desired database under *Address Source*.

Address information	
Data Source	SAP_SBODemoDE
Address Number	
Address search word	SAP_SBODemoDE
First Name	xFibu_nl_financial

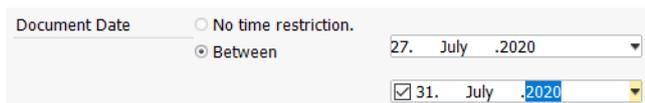
Your stored standard database is already suggested here. If you want to use a database other than the suggested one for the search, select the desired database from the list box.

You can also select all archived documents of a specific address or item. Enter the corresponding number in the *Address or Article* number field or select the address or article via the address browser in the *Address or Article search word* field. Now click on the *Selection*  button. If you want to search for several address numbers at the same time, enter the first number in the *Address number* field. Then press the pipe sign (|) and then enter the next number, etc.

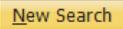
If you are working with user-defined fields (-> [Chapter 1.2.3.7 User fields](#)), these are displayed below the *Address/article search word* field. Enter the criteria you would like to search here.

Example: The designation *Project* was assigned as the first user field and this field was filled with the corresponding *project designation* during archiving. In search select the project name that was assigned to your documents to be searched.

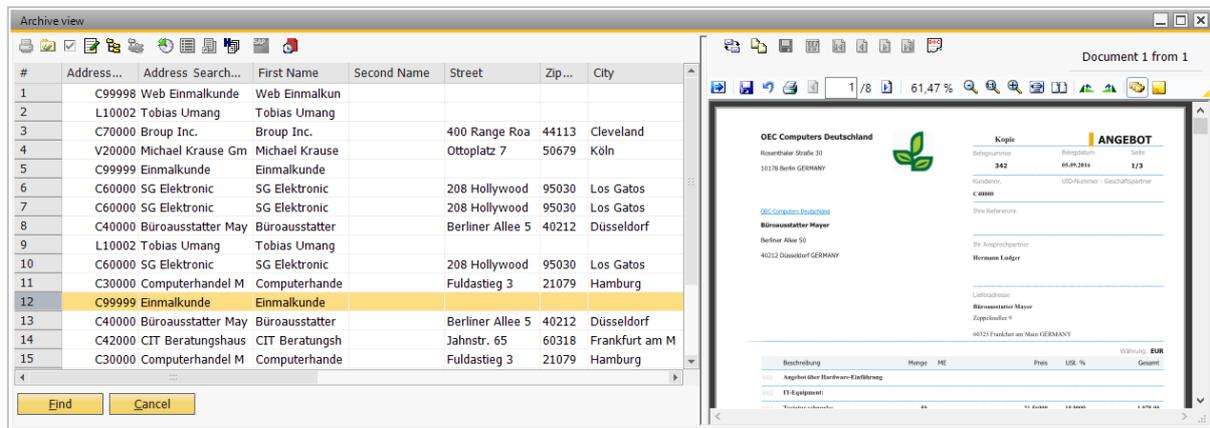
Switch the option field for the time limit *Document date* either to *No time limit* or to *Between*. If you have selected the *Between* option, you can enter the desired period in the two date fields. In the first field select the date of and in the second field the date until the desired period. You can select the date of the calendar via the list box .



Keywords are entered as search criteria in the lower area. You can also enter only fragments of the word you are looking for. It does not matter whether the fragment is at the beginning, end or in the middle of the word. All documents will be found that have this word fragment listed as a keyword. For example if you are looking for all invoices about toner, it would be sufficient to enter the word 'Ton'. All documents with the word *toner* will be found. However, other documents will also be found that have the word fragment 'Ton', e.g. '*Ton*', '*Hilton*', '*Tonart*', *Button*, etc.

The *New Search* button  clear the dialogue. The *Cancel* button  cancels the session and returns to the *Document Display* dialogue.

1.4.2 Archive display

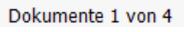


Once all the desired criteria have been entered, press the *Search*  button to search for the documents.

In the left-hand area the archived documents are displayed in a list form with the default settings. The documents are sorted chronologically by archive date.

Next you can see the *document display* dialogue. All documents that match the search criteria are displayed here. A list of all documents found is shown in the left-hand area. Using the scrollbar in the lower part of the screen further archive criteria are made visible.

#	Address...	Address Search...	First Name	Second Name	Street	Zip...	City
1	C99998	Web Einmalkunde	Web Einmalkun				
2	L10002	Tobias Umang	Tobias Umang				
3	C70000	Broup Inc.	Broup Inc.		400 Range Roa	44113	Cleveland
4	V20000	Michael Krause Gm	Michael Krause		Ottoplatz 7	50679	Köln
5	C99999	Einmalkunde	Einmalkunde				
6	C60000	SG Elektronik	SG Elektronik		208 Hollywood	95030	Los Gatos
7	C60000	SG Elektronik	SG Elektronik		208 Hollywood	95030	Los Gatos
8	C40000	Büroausstatter May	Büroausstatter		Berliner Allee 5	40212	Düsseldorf
9	L10002	Tobias Umang	Tobias Umang				
10	C60000	SG Elektronik	SG Elektronik		208 Hollywood	95030	Los Gatos
11	C30000	Computerhandel M	Computerhande		Fuldastieg 3	21079	Hamburg
12	C99999	Einmalkunde	Einmalkunde				
13	C40000	Büroausstatter May	Büroausstatter		Berliner Allee 5	40212	Düsseldorf
14	C42000	CIT Beratungshaus	CIT Beratungsh		Jahnstr. 65	60318	Frankfurt am M

The document selected on the left is made visible in the right-hand area. If the document consists of several pages, you can scroll page by page  using the navigation buttons. The *First* button  jumps to the beginning of the document, the *Previous* button jumps  one page back, *Next* jumps  one page forward and *Last*  jumps to the end of the document.

Sorting:

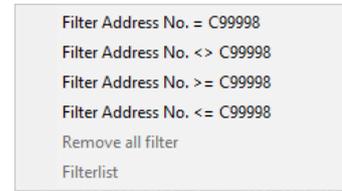
You can change the sorting by clicking on the corresponding column header with the mouse. The data records are then sorted alphabetically in ascending order. Clicking the column header again changes it to descending sorting.

Column width

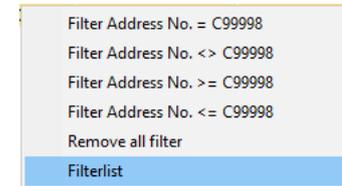
Change the column width by moving the mouse to the end of the desired column header. The mouse pointer changes to a double arrow. Click and drag the mouse to the desired column size.

Filter

You can compile your displayed data according to all the criteria shown in the column header. Click with the right mouse button (context menu) on the desired entry in the list (in our example the company "4 Fitness" was selected in the column *Address search term*) The context menu opens. Now select whether your search term should be equal to =, not equal to <>, greater than or equal to >= or less than or equal to <= the value. You can set filters on already filtered data by simply clicking again on the desired value in the column and opening up the context menu again.

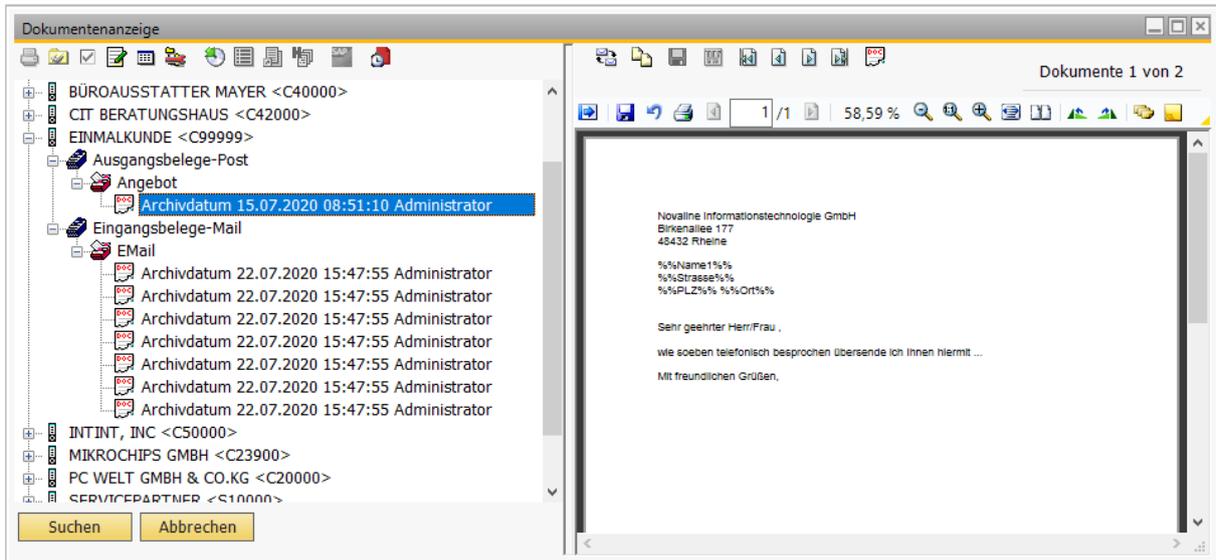


You can get an overview of all set filters in the context menu.



A mouse click on the *Filter* button **Filter** or the command *Cancel all filters of the* context menu cancels the entire filter again.

You can change the view of the list to the tree structure by selecting the  button *Change display type*.



The records are compiled via business partner or article number. The next category is document category, then document type and then document number. Different versions of a document are listed under the most recent version of the document.



 In the document view, Word and Excel documents can be printed directly.



1.4.3 Comments

Already archived processes of any kind can be provided with one or more comments in the archive display. Several users can add comments or information about the archived entry to each other.

The button "Comment on document"  opens a new window where you can enter your comment:



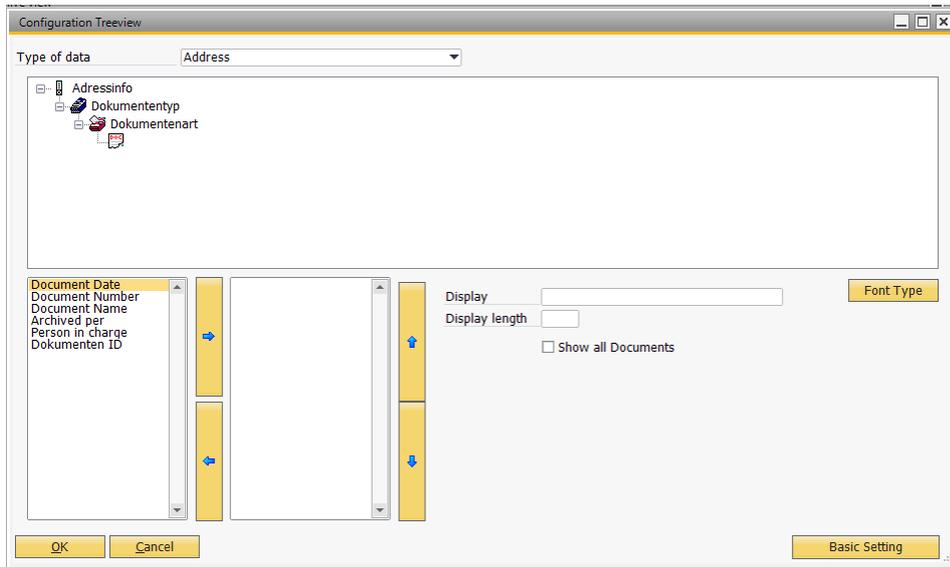
Below the archived entry all comments are displayed with the name of the user and the date of the entry; the latest entries are displayed on top:



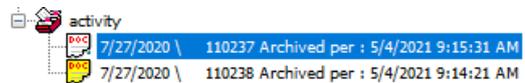
The comments are neither printed nor exported. They merely provide an additional information and communication option within the archiving.

1.4.4 Configuring the tree view

The display of the tree view can be customised. Click on the "Configure Display Tree" icon in the document display. The following dialogue opens:



The default setting for the display of archived documents is "Document date \ (series, if applicable) Document number Archive date".



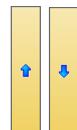
You can return to these basic settings any time by clicking on the "Basic settings" button at the bottom right.

You can now edit the fields in their right order. The font and number of characters are used; in addition the user-defined fields (UDF User Defined Fields) can also be included in the tree representation. Select a field that you want to include in your tree representation and click on the button "To the right".

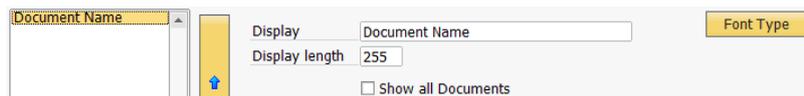


Use the "To the left" button to remove a field from the selection.

Add all the desired fields in this way. You can change the order of the fields using the "Up" or "Down" button.



Select a field to be displayed in the tree view: The indication of the field with the number of characters to be used appears on the right. The display length can be changed.



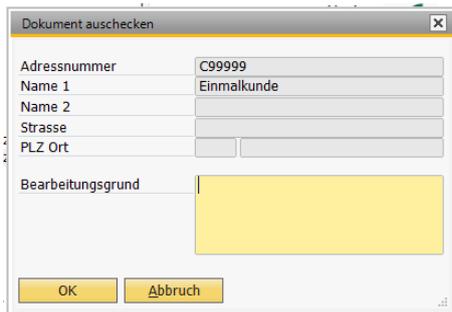
The display length can be changed.

The Font button allows you to edit the font and font style (bold, underlined, etc.); this setting affects all fields together.

1.4.5 Editing archived Office documents

Archived MS Office Word or Excel files can be stored (checked out), edited and stored (checked in) again as a new version; the previous version is retained as a history. The prerequisite is to determine an output directory in document management (see Chapter [1.3.1.4 Document management](#)) for the document type under which you have archived the Word or Excel file.

In the archive display of the Office document, click on the button "Check out documents" .



The dialog box 'Dokument auschecken' contains the following fields:

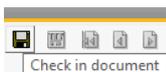
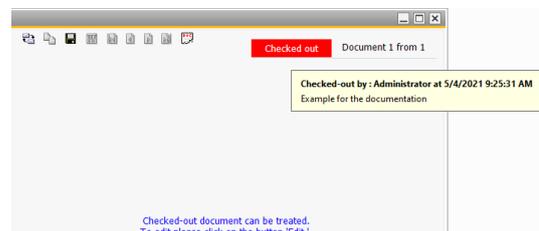
- Adressnummer: C99999
- Name 1: Einmalkunde
- Name 2: (empty)
- Strasse: (empty)
- PLZ Ort: (empty)
- Bearbeitungsgrund: (empty text area)

Buttons: OK, Abbruch

You now have the option to enter a reason for checking out as information for the other users. The status as a checked-out document is shown with a red button. Move the mouse over this button: The user, date and reason for the check-out are displayed.

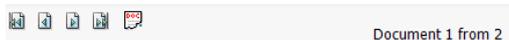
 To edit the document click on the "Edit" button. You can now edit the document in the assigned application. Then save the file as usual.

If you want to interrupt the editing and shut down the computer. This is no problem! The important thing is that the document is saved and closed. You can end the archiving then. If you want to continue editing the document or check it back in, open the document again in the archive view and click on "Edit".



To check in the document click on the button "Check in document".

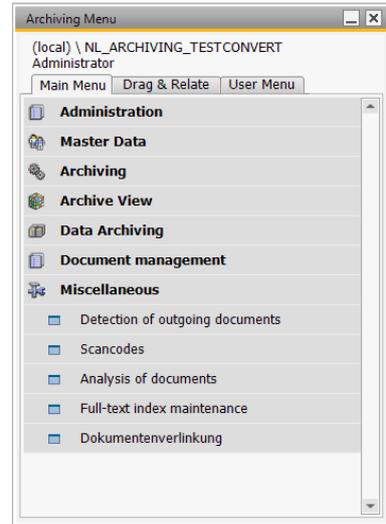
The toolbar now says "Documents 1 of 2"



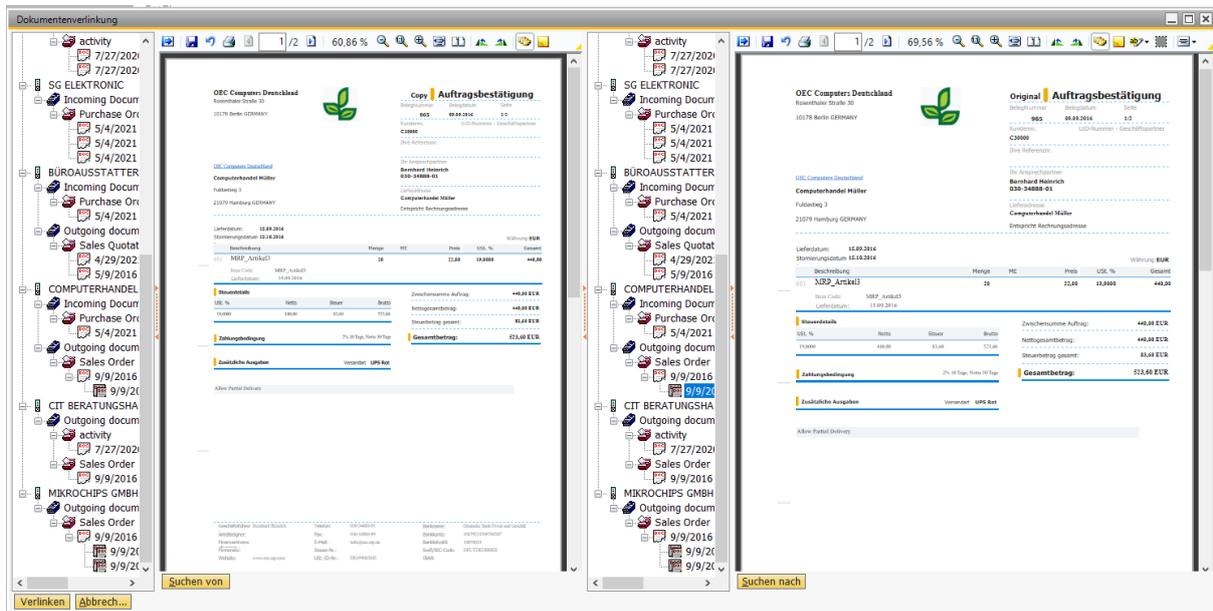
You can now scroll back and forth between the original version and the new version. No. 1 is the latest version in each case.

1.5 Document link

You can start manual document linking via the archiving menu.



After you have pressed the menu, two almost identical windows are displayed. Use the **Suchen von** button to select the source document and the button to **Suchen nach** select the target document. The **Verlinken** two documents are linked to each other via the button.



1.5.1 Link to the archive process

During the archiving process (via document scanning or document archiving), other processes that have already been archived can be linked to this new archive document.

To link a document to another document during the archiving process, click on the button *Document linking* Dokumentenverlinkung . If the button is not available, please activate the button in the General Settings: Full Text Keywords (see Chapter [1.23.1 Full Text Keywords](#)).

Now the document display opens. The "Search" button is located at the bottom of the screen. Press the "Search" button once with the right mouse button. In the subsequent search dialogue you can specify the criteria to find the document you are looking for.

Select the desired document and click on the "link" button to link two documents. You can see the display of the link in the "green field" .

To the right you will find a "delete button" therefore you can delete the link.

Now click on the button *Archive* . The new document is linked, keyworded and archived to the archived document.

The screenshot shows the SAP Archiving interface. On the left, the 'Document linking' section is active, showing a green 'Active' status and a 'Link' button. Below this, various document details are listed, including 'Type of data: Address', 'Document Category: Incoming Documents', and 'Document Date: 7/27/2020'. The 'Address information' section includes 'Data Source: SAP_SBODemoDE', 'Address Number: C99999', and 'Address search word: Einmalkunde'. At the bottom left, there is a 'Full-text index' section with a list of keywords including '(AGB)', '(EUR)', and various numbers.

On the right, a preview of an invoice document is displayed. The document is titled 'Rechnung' and is dated '7.1. Mai 2020'. It includes a table with columns for 'Pos.', 'Art. Nr.', 'Beschreibung', 'Menge', 'Einheit', 'VK-Preis', 'Preis per', and 'Betrag'. The table contains several rows of invoice items, including 'Lieferung 20-3878411 08.05.19' and 'Lieferung 20-3885520 18.05.19'. The document also features a 'DCHA' logo at the bottom right.

1.5.2 Link to SAP B1 documents

Internal references of B1 documents according to the link plan can also be displayed in the archiving, provided that archived transactions exist for the B1 documents. In the archive view linked documents are displayed according to their assignments.

This takeover can be carried out in 2 ways:

1. You can manually trigger the processing run: In the main menu of B1 - Archiving via the entry "Document linking". Only B1 documents can be displayed. If the menu item is not available, please activate it via the Novaline Addon Configurator. Please click on the menu item. The following query appears:



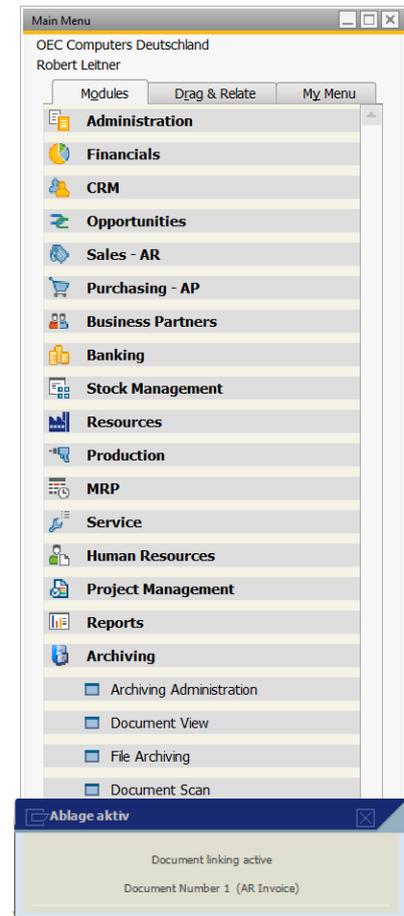
The processing run can still be cancelled with "No"; "Yes" starts the transfer of the link.

Please note: depending on the data size processing may take some time and use up system resources accordingly. Use automatic processing for schedule processing if necessary.

2. Automatic processing: For this an SQL job must be set up that provides an ASCII file with the details of the existing links in B1; this ASCII file can then be processed by the Novaline Trigger (the Novaline Trigger must be installed and prepared for linking). For detailed information on installation, please refer to the separate documentation "Document linking as a service").

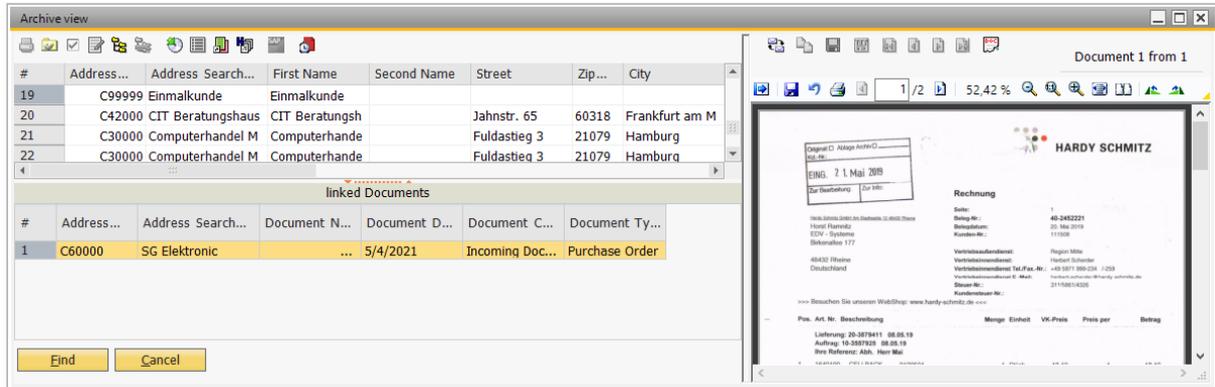
Advantage of automatic processing:

- External documents (scans) are also displayed.
- Processing can be repeated automatically and shifted to hours with little system load.

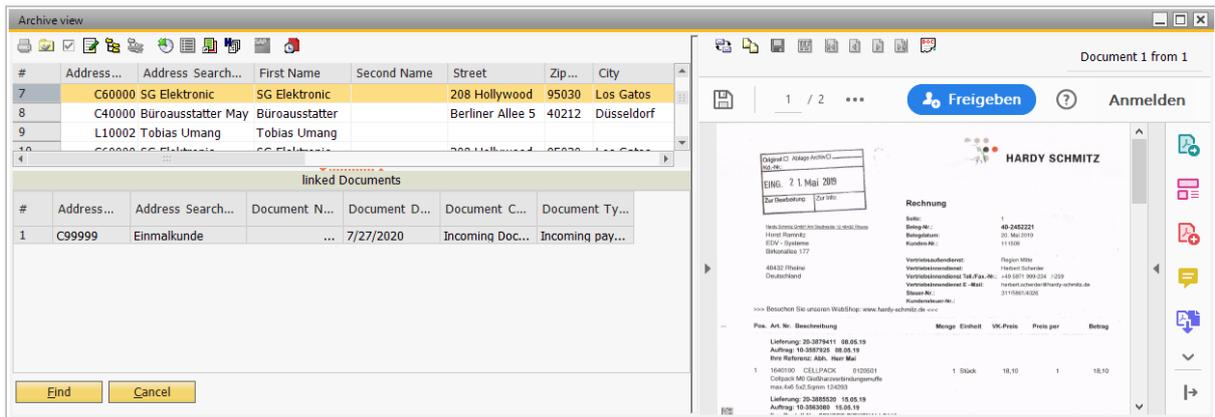


1.5.3 Document display of linked documents

When displaying linked documents, the left-hand side is divided into an upper half showing the entry searched for and a lower half showing the documents linked to it. Display of the searched transaction (sales order):



To view the supporting documents linked to it, click on the corresponding entry below. There is a display of the offer in the lower half:



As it is well known further functions such as displaying the keywording , configuring the tree display , displaying the document in B1 etc.  in the archive view with the upper toolbar.

Double-click to display the entry at the bottom in the upper half; the document here is now displayed in the lower half.

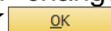
- This allows the linked documents to be switched between being displayed in the upper or lower half.
- This makes it possible. For example, if you want to display an archived delivery note in B1 (jump to archive). Now you can open the corresponding archived invoice. Finally, you can display the invoice again in B1 (jump back to B1).

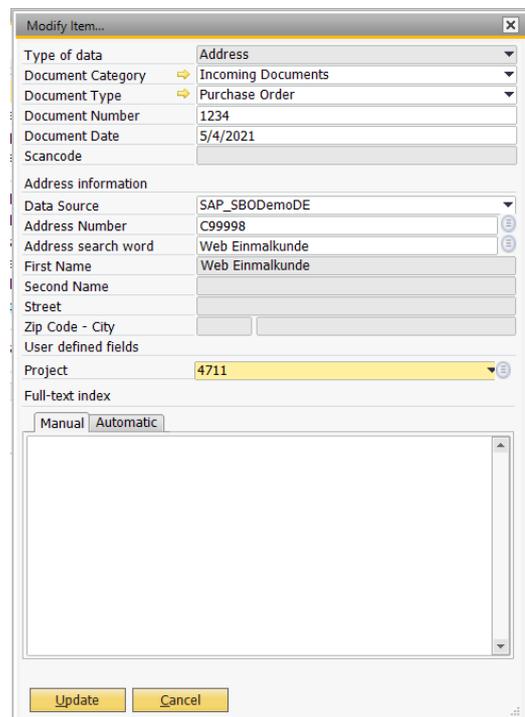
1.6 Working with archived documents

1.6.1 Modification of existing filing criteria

You can subsequently change the criteria of the already archived documents. Select the desired document from the list with a single mouse click and then click on the button *Change archive record* . A new dialogue box *Change archive record* opens. Here you can correct, remove or add to all the information you have already entered.

In the existing example a user-defined field has been inserted with the name *Project*. If we assume that the project number "4711" assigned here is not correct, we click in the field and overwrite the entry. If one or more keywords are missing, click on the *Manual* tab and enter the desired values.

Confirm your changes with *Update*  and then with *OK* .



1.6.2 Archive compilation

You have the option of printing the selected documents or a selection of them on other media. Select the *Print compilation* button . A new column with checkboxes for the print compilation is inserted. Activate the checkbox in front of each desired document. If you want to select all selected documents, press the button .

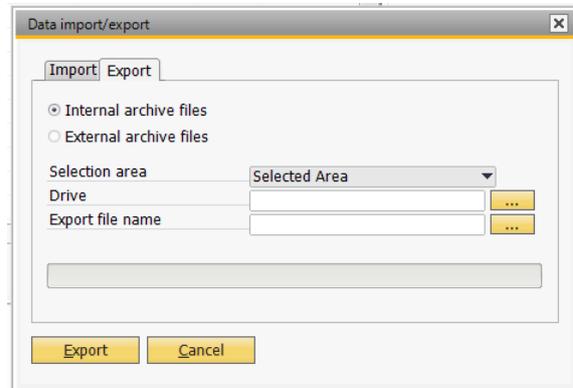
1.6.2.1 Output to the printer

After you have marked the desired documents via the checkboxes, press the  *Print list* button. The print dialogue opens. Here you can select a cover sheet for your documents. Two sheets have been stored. One for a regular file compilation and one for a legal file compilation.

For later processing or so that you can see at a later time which documents you have printed. You can export the selection including the marks (checkboxes) to your hard disk and read them in again at any time later. (see the following Chapter [1.6.3.2 Internal Export of Archived Documents](#)).

1.6.2.2 Internal export of archived documents

After you have marked the desired documents via the checkboxes, press the button *Archive Import/ Export* . Switch to the *Export* tab. Select the radio button *Internal archive file*. In the field *Area selection* the selection for the selected documents is suggested. If you want to export all selected documents, change to *Selected documents in the selection*. In the *Drive* field select ... your desired archive directory via the button.

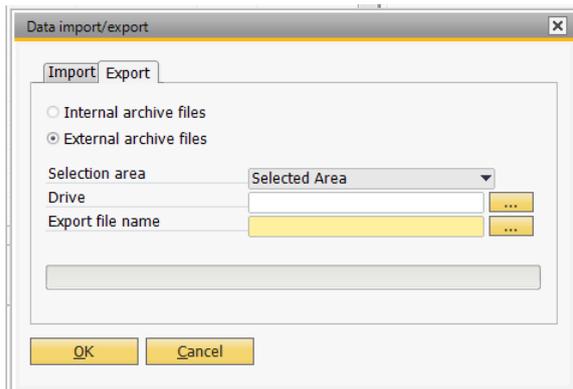


A new directory can also be created here. Enter the desired name for your export file in the *File name* field. If possible, choose a "speaking" name so that you can find your file immediately for a later import. Carry out the export via the *Export* button **Export**. The file is saved in a XML format (->).

1.6.2.3 External export of archived documents

After you have marked the desired documents via the checkboxes, press the *Archive Import/Export* button .

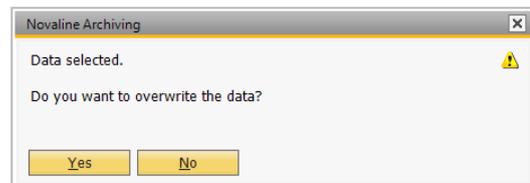
Switch to the *Export* tab. Select the radio button *External archive file*. In the field *Area selection*, the selection for the selected documents is suggested. If you want to export all selected documents, switch to *Selected documents in the selection*.



Select ... your desired archive directory in the *Drive* field using the button. A new directory can also be created here. In the *File name* field, enter the desired name for your export file. If possible, choose a "speaking" name so that you can find your file immediately for a later import.

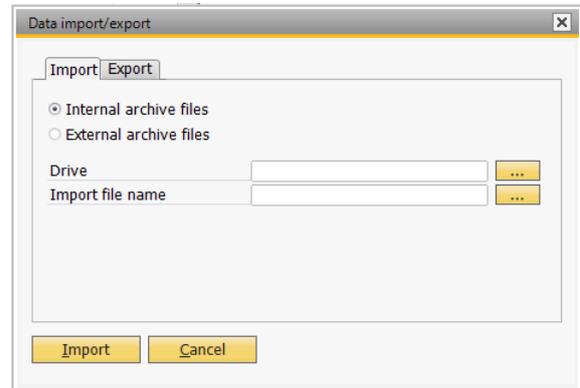
Export The export starts via the *Export* button. The file is stored in XML format. All selected documents are also stored as PDF files in the directory. This ensures that you can view the documents on an external medium - without access to your database.

If archive files are already stored in the selected directory, they will be deleted via the dialogue.



1.6.2.4 Internal import of archived documents

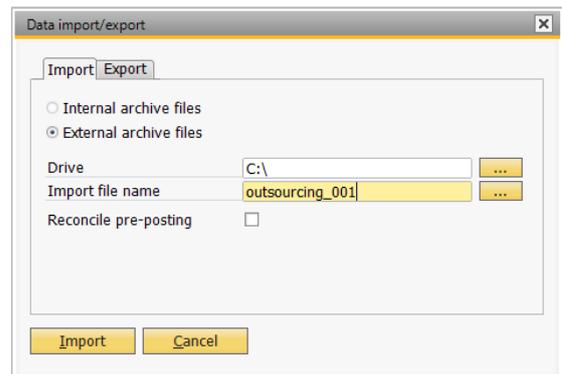
If you want to view your previously exported documents at a later time, select the *Import/Export* button of the document search (archive view). Switch to the *Data Import* tab. Select the radio button *Internal archive file*.



In the *Drive* field use the button to select the corresponding drive (e.g. C:\). In the field *File name* select the corresponding archive file from the directory. Start the import by clicking on the *Import* button. The documents present and marked in the archive view at this time are being overlaid with the imported information.

1.6.2.5 External import of archived documents

To import your external data proceed as follows. From the document search (archive view) select the *Import/Export* button. Switch to the *Data Import* tab. Select the radio button *External archive file*. In the *Drive* field use the button to select the corresponding drive (e.g. the USB stick). In the *File name* field select the corresponding archive file of the directory. Start the import via the *Import* button.

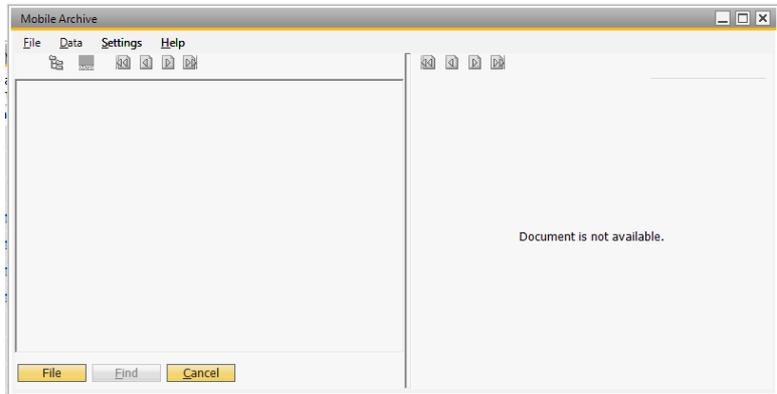


The documents are available and marked in the archive view. At this time they are overlaid with the imported information. If you want to compare the booking data of the external file in your database, you have to activate the checkbox *Compare pre-capture* before the import.

1.7 Mobile archive

The mobile archive allows you to view exported documents of the Novaline archive database.

Start the *Mobile Archive* programme via *Start, Programs, Novaline Software, Novaline Archiving, Mobile Archive*.



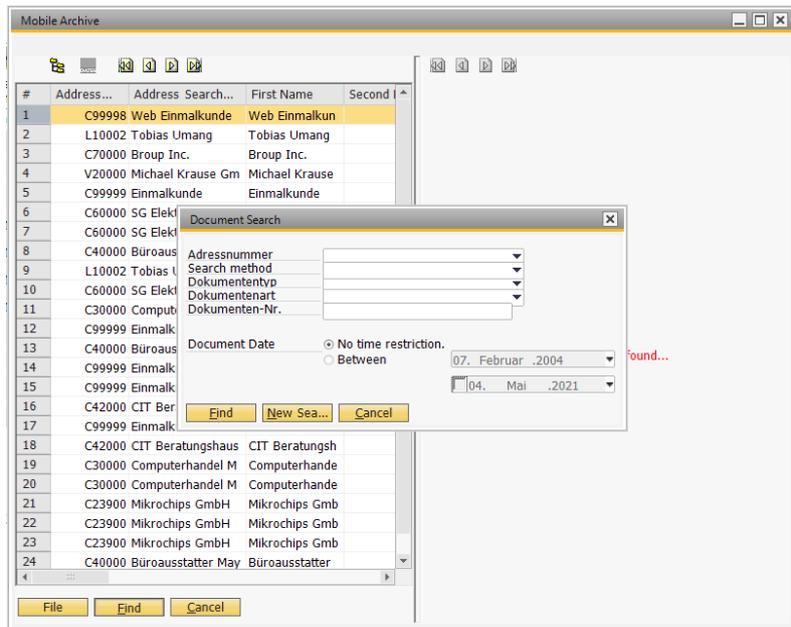
You do not need Novaline archiving, the Novaline database or the SQL server on your computer.

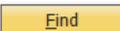
It is sufficient if you have installed the Mobile Archive on your computer (e.g. laptop).

Press the button *file*  . The system opens the file directory. Select the XML file to be imported (e.g. from the USB stick). All documents are listed in the usual display.

If you want to limit the document search further, press the *Search*  button.

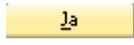
A dialogue will open in which you can limit your search result according to the fields *address number*, *search method*, *document type*, *document no.* and/or *document date*.

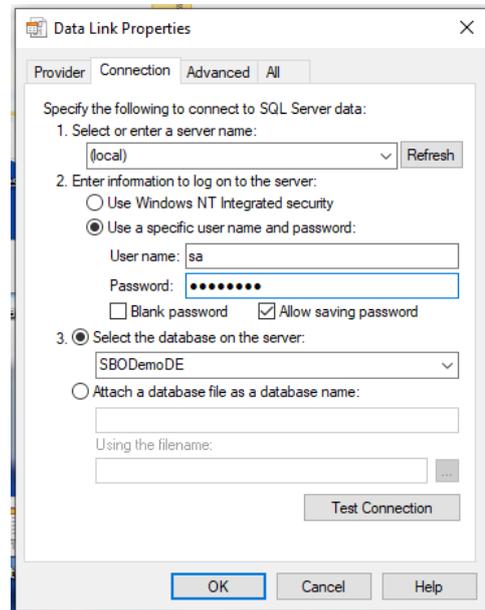


Here, the fields can be used individually or combined as desired. After you have entered your search criteria, press the *Search* button  within this dialogue and you will get the corresponding result in the usual display form.

1.8 Research archive

The Archive Search module can be installed on workstations that only have visual access to the archive. Requirements are the correct installation and set-up of Novaline Archiving on at least one workstation and the archive database on the server.

When you open the search archive for the first time, you will be asked to create a new UDL. Confirm the dialogue with Yes . The *data link properties* will open. Select your database server here and your Novaline archive database. By default the database is *nl_archiving*. Confirm your settings with *Test connection* and then with OK.



Start the search archive from the Start menu under *Start, Programs, Novaline Software, Novaline Archiving, Search Archive*.

The document search is opened. In this dialogue you can enter several search criteria. If you do not make any entries, all archived documents are displayed. For more information on the search, see Chapter [1.4 Archive-Document Search](#).

Pos.	Art. Nr.	Beschreibung	Menge	Einheit	VK-Preis	Preis per	Betrag
1	1640100	CELLPACK 0120501 Cellpack MO Ginstharzverbindungsuffe max.4x6 5x2,5gmm 124293	1	Stück	18,10	1	18,10
1	4086742	VOSSLÖH 3026410 Vosslöh 529029 VVG LL/KL 34W/36W/38W/ 40W+2x18W 2x20W 28x41x150mm 230V 50Hz Kupfer	1	Stück	4,37	1	4,37
			1	Stück	0,39	1	0,39

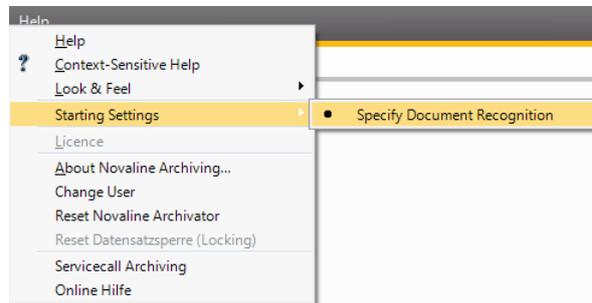


If you want to update to a new programme version, first you must update the Novaline archiving basic installation. You can then update the archive search on the search workstation.

1.9 Document recognition

Document recognition is used for automatic archiving of external documents (e.g. Word, Excel) that are to be archived via printing on the "Novaline Archivator". Without document recognition the indexing data have to be entered manually. With this function you don't need to edit manually.

The document is archived without any further work on the part of the user.



For automatic document recognition it is necessary that the documents used for this are regularly recurring documents in which the required fields (*document type, document number, address number and date*) have a fixed position.

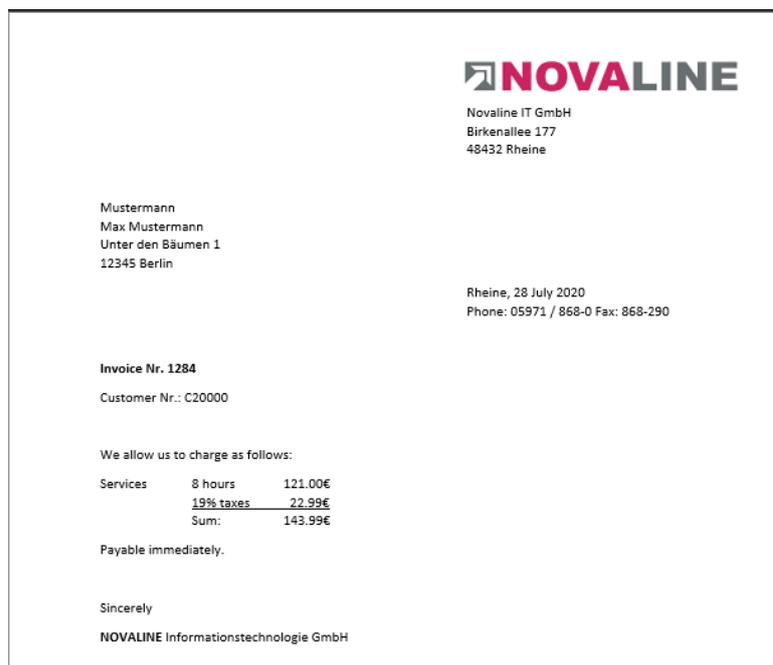
To switch on the document recognition go to "Help" and "Start setting" in the menu bar in Archiv.One. Here you can switch the document recognition on and off with the left mouse button.

After you have switched on the document recognition, you can

now use this. In the first step, the new voucher must be set up in the voucher recognition, then this voucher can be archived automatically. The handling of the module is explained below.

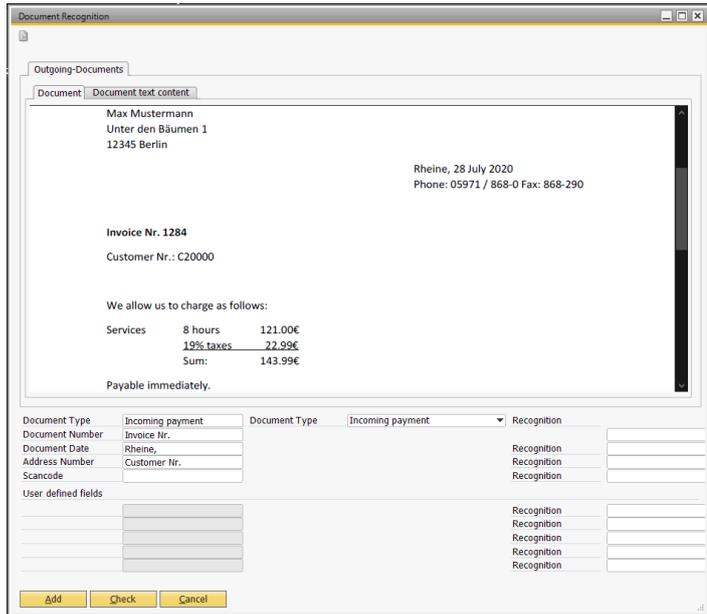
Step 1.

As an example, here you have an incoming invoice that was created in Word. The incoming invoice contains the various information you will need later. (Invoice no., customer no., date, ...) If you now print the document on the "Novaline Archivator", the "document identification" appears.



In the "Document recognition" you can now enter the information you need to archive the document. You do this, for example, by marking ("Incoming invoice") and dragging it into the "Document type" field with the left mouse button.

For the remaining fields, such as document no., document date, address number (customer number) and scan code, follow the same procedure.



Document type:

Use the left mouse button to select the document type in the document, such as "Incoming invoice" in the example, and drag the selection with the left mouse button into the "Document type" field. If the document type is available in Archiv.One, it is automatically displayed in the "Document archive" field.

Document no:

Use the left mouse button to select the document number in the document, as in the example "Document number", and drag the selection with the left mouse button into the field "Document No."

Document date:

Here you mark the date in the document with the left mouse button as shown here in the example **Rheine,** and transfer this to the "Document date" field with the left mouse button.

Address number/customer number:

Here you mark the address number in the document with the left mouse button as shown here in the example **Kunden Nr.** and transfer this into the field "Address number" with the left mouse button.

Please make sure that only the words you want to take over can be placed behind the marked word. For example **Rheine,**

When all required fields are filled, press .

In the right-hand area you can check if the document recognition has recognised the lines correctly.

Recognition	
Recognition	1284
Recognition	28 July 2020
Recognition	C20000
Recognition	

If this is the case, now click on . The document is set up for further automatic archiving.

Step 2: Archiving a document that has been set up in the document recognition system

In order to archive the document the "Document recognition" must be switched off in Archiv.One via "Help/Start setting".

Now print the document on the "Novaline Archivator". The document is automatically recognised and stored in the archive with the preset settings. Every further document that corresponds to the document set up here is now automatically archived. In our example, each further invoice would be archived automatically just like the previous ones.



Document recognition is a separate module and must be licensed separately.



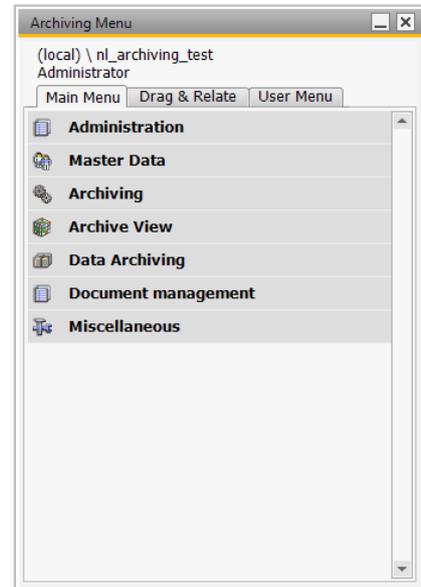
If you are using Adobe Reader X, please deactivate the protected mode in the preferences.

Chapter 2 Data archiving

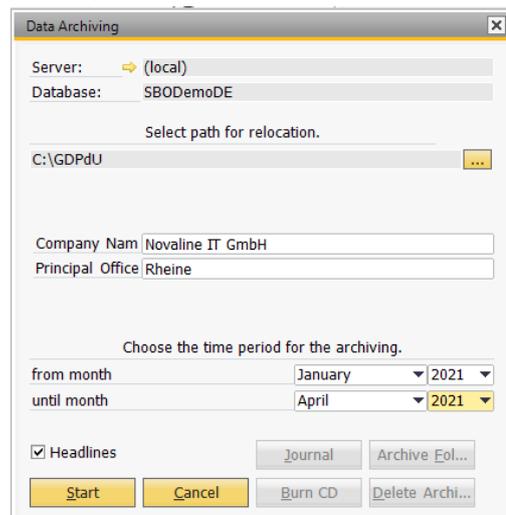
The programme is used to provide the tax-relevant data according to §§146 and 147 of the German Fiscal Law (AO) for a data medium transfer.

According to the *principles of data access and verifiability of digital documents* (GDPdU), in addition to the stored tax-relevant documents and records, all structural information necessary for the evaluation of the data, such as format templates, file structure, field definitions and links, must be transferred in machine-readable form on a data carrier.

To start the programme select *Data archiving*, *Data archiving* of the main menu.



The *Data Archiving* dialogue opens. Your default database, which you selected in the *General settings*, is proposed for archiving.



Change the database by clicking on the selection arrow ➔. The *Data Link Properties* dialogue opens. On the *Connection* tab select your SQL server or the valid instance of the SQL server from the list box (➔) under 1. Click on the arrow ▾. If not a server is displayed, click the *Refresh* button **Aktualisieren** *Refresh* button **Aktualisieren** and try again. When you have entered all the information, check everything by pressing **Verbindung testen** *Test Connection* button. The *Microsoft Data Link* dialogue appears.

If the test was successful, confirm this dialogue with **OK** **OK** and also complete your settings with **OK**. The system automatically returns to *data archiving*.

The *server and database* fields are not yet connected. You see this by the three question marks "???" in the fields. Press the **Connect** **Connect** button. The previously selected database is entered.

In the field *Swap path* select the desired directory for your data archive. The default directory "C:\GDPdU" is suggested. Click on the button to change the directory.

The default value "Test" and "Rheine" are suggested in the field *Company name* and registered office. Change this name accordingly. This data is written to the archive file.

In the fields "of month" and "to month" you determine the period from which the data is to be archived.

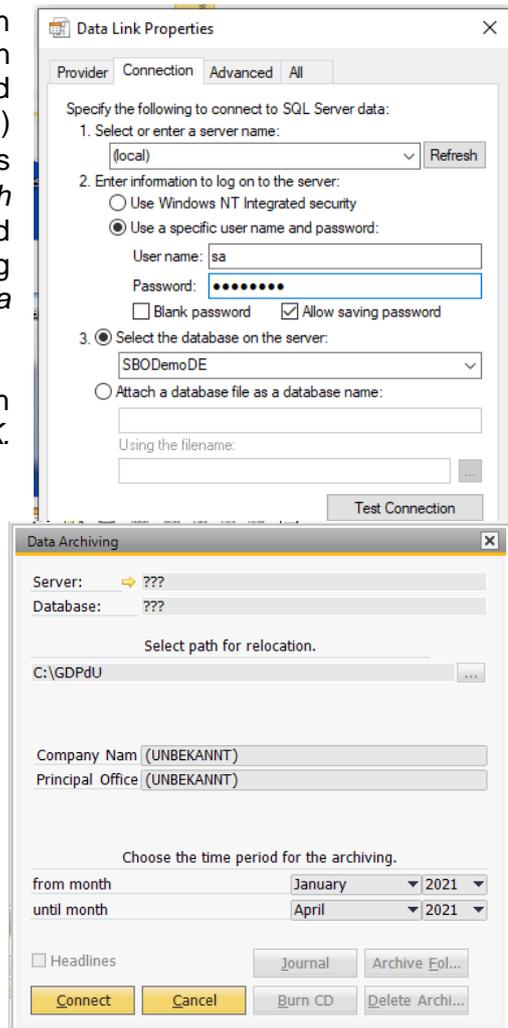
Confirm your entries with **Start** **Start**. The data is read of the using definition files out of SAP Business One® and stored in the programme directory you selected previously for each database (C:\GDPdU\{NAME of database}).

At the same time, a data import interface is created according to the "Description Standard for Data Carrier Transfer" (Audicon) using the XML-based standard. With this data import interface a nationally standardised audit software of the tax authorities "IDEA" (Audicon, Düsseldorf) can process this auditable data.

In addition, one documentation file per data table is provided of a folder provided in the data folder. Further table documentation can be stored here, which is also copied to the data carrier.

During a programme run, a log file is created which provides information about the tables created and the number of data records.

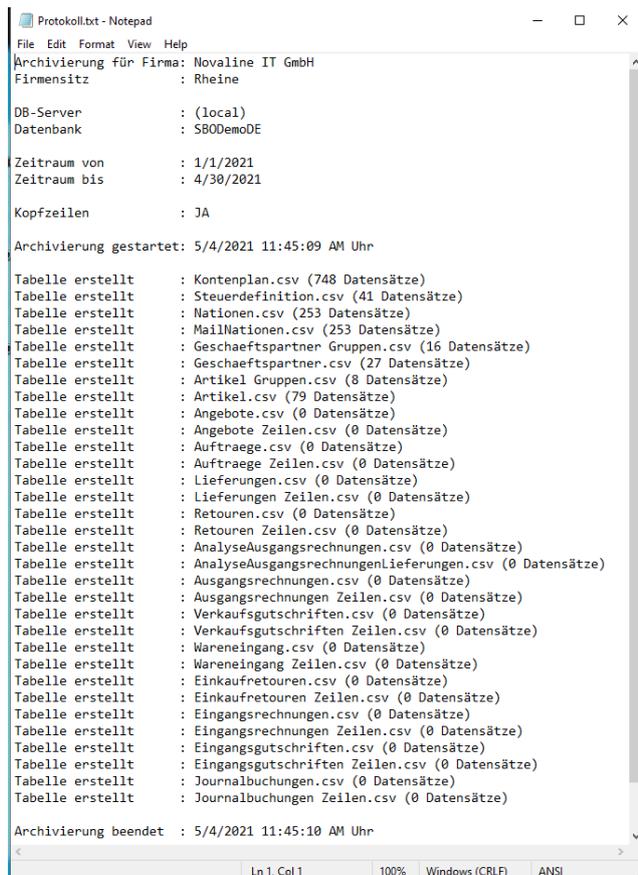
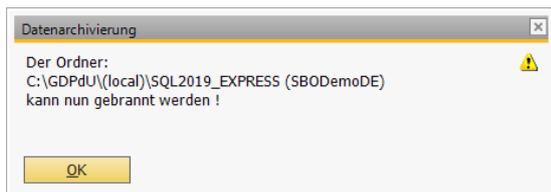
User-defined tables can be added in the definition files.



The *Protocol* button  shows the protocol for the data archiving.

Use the *Archive Folder* button  to open the file directory of the archived data

The *Burn CD* button  prepares the folder (C:\GDPdU) for the burning process. The following message appears:



Press the  *Delete archive* button if you want to delete the archived data in the archive directory. Make sure that you have completely saved your archive data beforehand. An evaluation via the *Data Analysis* programme is **no** longer possible after deletion.

2.1 Data analysis

Here you can check your data that were previously archived. Select *Data Archiving*, *Data Analysis* from the main menu: The *Data Analysis* dialogue opens.

In the first field the current data path of your last archived data is already suggested. This can be changed at any time by clicking on the *Selection* button.

In the Action field select the desired analysis. The following analyses are available:

Gap analysis:

You can use the gap analysis to show gaps in the document number range by left-clicking on the *Evaluate* button.

Discount analysis:

This analysis shows the highest, lowest and average discount, if available.

Size class analysis:

In the size class analysis, so-called size classes are to be defined in advance. Select the size class analysis in the *Action* field. Press the now active button *Class definition* . In the following dialogue you define your size classes.

Example: You want a compilation of your invoice receipts for the values: 0 to 600 €, 600 to 1,000 €, 1,000 to 2,000 €, 2,000 to 2,500 €, 2,500 to 3,000 € and from 3,000 €. Use the button *New to* - enter the corresponding sum sizes. The entered value defines the "up to" limit in each case. When you have made all the entries, exit the dialogue with *Cancel*.

#	Summengrößen ab ...
1	3000
2	2500
3	3500

Decide on a sort order (ascending or descending) and confirm with *Evaluate* .

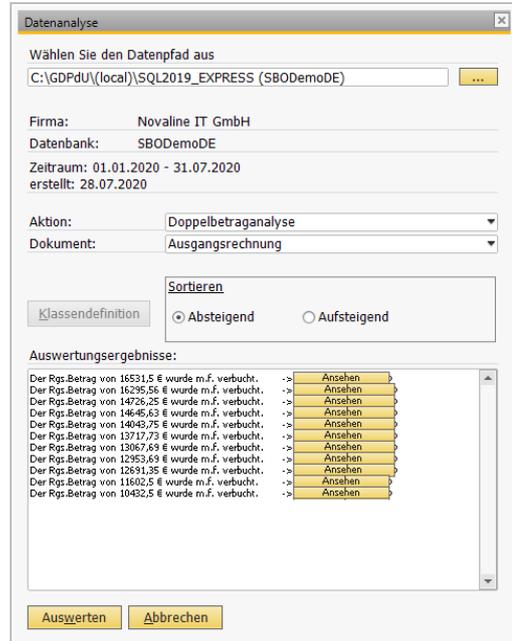
Click on the *View* button to open the analysis dialogue. Here the invoices are listed with voucher number, voucher date, amount and company.

Double document number analysis:

Here you can determine whether document numbers have been assigned twice. Click on the View button to [Ansehen](#).

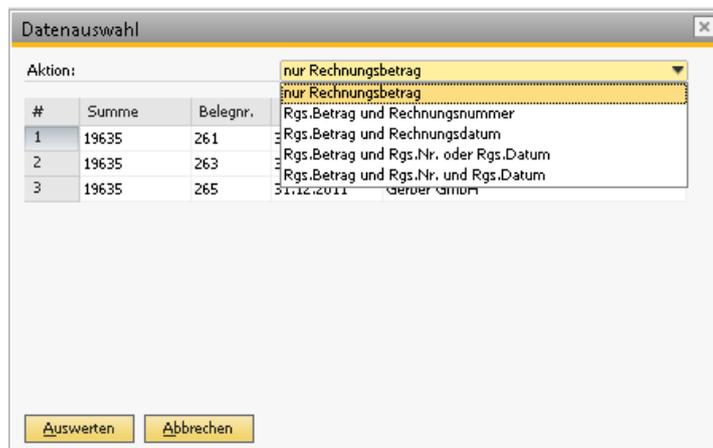
Double amount analysis:

With the double amount analysis you can get an evaluation of duplicate invoice amounts. This is the case for the same invoice number, the same invoice date or both.



Click on the View button to [Ansehen](#) branch into the analysis dialogue. Here the invoices are listed with voucher number, voucher date, amount and company.

In the data selection select the Action select the appropriate option according to which criteria the data should be analysed.

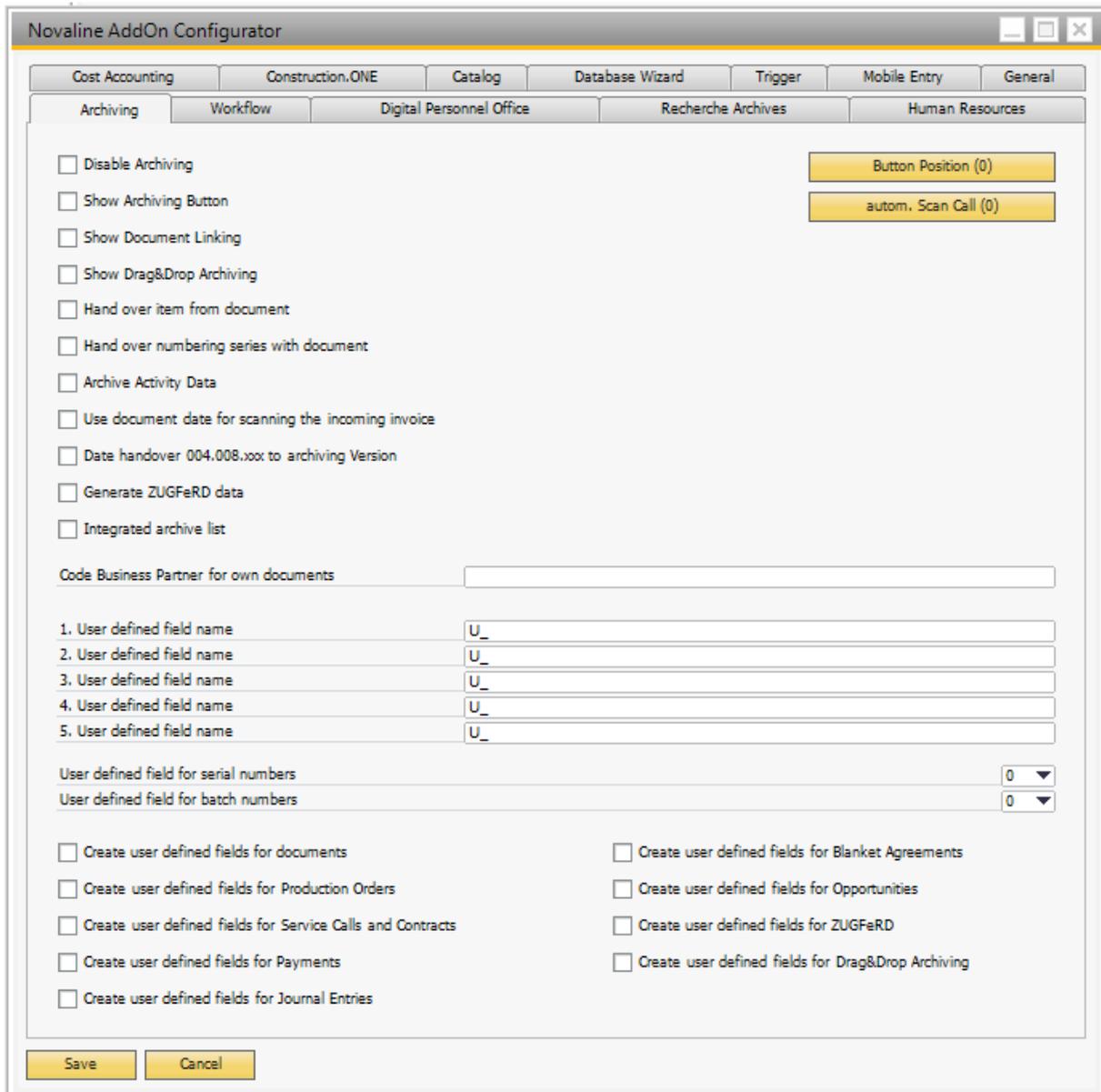


VAT analysis:

The VAT analysis checks whether there are different tax rates between the delivery note and the invoice.

Chapter 3 Novaline AddOn Configurator

In the Novaline AddOn Configurator the Novaline programmes Archiv.One, Kore.One, Personal.One, Construction.One and Catalogue are set up to work with Business One. You can find the Novaline AddOn Configurator in the main menu of Business One under Administration/AddOns. The various tabs in the Novaline AddOn Configurator are used to make the settings for the individual programmes.



Novaline AddOn Configurator

Cost Accounting | Construction.ONE | Catalog | Database Wizard | Trigger | Mobile Entry | General

Archiving | Workflow | Digital Personnel Office | Recherche Archives | Human Resources

Disable Archiving

Show Archiving Button

Show Document Linking

Show Drag&Drop Archiving

Hand over item from document

Hand over numbering series with document

Archive Activity Data

Use document date for scanning the incoming invoice

Date handover 004.008.xxx to archiving Version

Generate ZUGFeRD data

Integrated archive list

Code Business Partner for own documents:

1. User defined field name:

2. User defined field name:

3. User defined field name:

4. User defined field name:

5. User defined field name:

User defined field for serial numbers:

User defined field for batch numbers:

Create user defined fields for documents

Create user defined fields for Blanket Agreements

Create user defined fields for Production Orders

Create user defined fields for Opportunities

Create user defined fields for Service Calls and Contracts

Create user defined fields for ZUGFeRD

Create user defined fields for Payments

Create user defined fields for Drag&Drop Archiving

Create user defined fields for Journal Entries

Button Position (0)

autom. Scan Call (0)

Save | Cancel



Changes in the configurator only take effect after restarting the AddOn.
Creating custom fields causes an entry to be made in the Business One database. It may take a few seconds for these changes to be completed.

3.1 Archiving index card

Deactivate archiving:

When set this checkbox, disables the "Archiving" menu item in the Business One Main Menu.

Show storage button:

This activates the "File" button in the Business One dialogues.

Show document link:

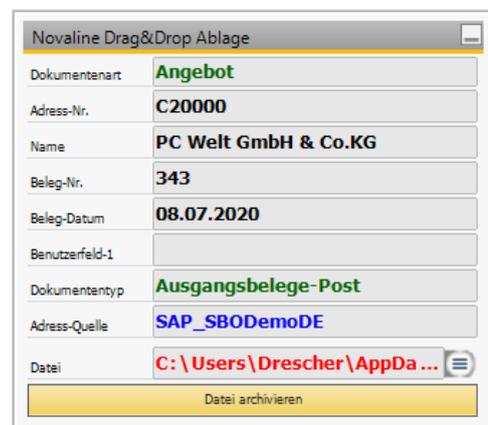
The "Document Linking" is displayed in the Archiving main menu in Business One. With "document linking" all archived documents can be linked automatically if they belong to a common process in Business One.

Example: A quotation became an order, the order became a delivery, the delivery became an invoice. This relationship in Business One is entered as a link in the archived documents.

Show Drag&Drop Tray:

By activating the checkbox a new symbol appears in the task bar under the running processes. A left click on this symbol opens the Drag&Drop folder where you can drag files from the Windows Explorer or e-mails from MS Outlook. The document is indexed to the respective opened menu item in SAP.

Example: You have created an offer in SAP to which an e-mail is to be attached in the archive. You open the offer in SAP, then select the Drag&Drop folder of the taskbar and drag an e-mail from Outlook into it. After you have clicked on the *Archive file* button the e-mail including attachment (if any) to the offer is indexed and archived.



Dokumentenart	Angebot
Adress-Nr.	C20000
Name	PC Welt GmbH & Co.KG
Beleg-Nr.	343
Beleg-Datum	08.07.2020
Benutzerfeld-1	
Dokumententyp	Ausgangsbelege-Post
Adress-Quelle	SAP_SBODemoDE
Datei	C:\Users\Drescher\AppData...

Datei archivieren

Transfer articles from documents:

Transfer of article numbers from SAP to archiving.

Numbering series to be transferred to the document:

If the checkbox is activated, the prefix, document number and suffix are displayed in the document view.

Archive activity data:

After activating this checkbox, the document is created and archived when an activity is saved.

Use the document date (TaxDate) when scanning the incoming invoice:

The document date corresponds to the voucher date and not the booking date.

Date transfer until archiving version 004.008.xxx:

If an older archiving version than 004.008.xxx is set up, this option activates the transfer of the document date from SAP BO to Novaline Archiving.

Generate ZUGFeRD data:

This option makes it possible to attach a supplier's ZUGFeRD data to a document.

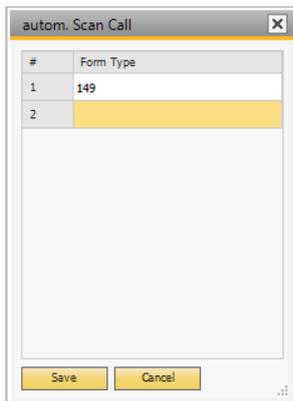
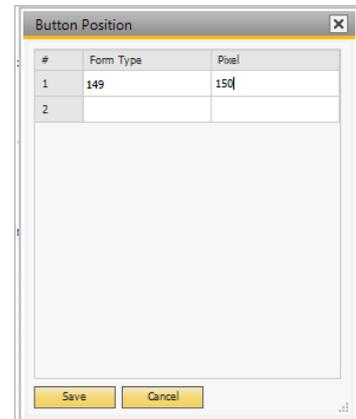
integrated archive list:

The integrated archive list displays a new "Archiving" tab under the respective document selected in SAP. All archived entries for the document are displayed there. Double-click on the selected entry to display the archived document.

Button positions:

This button opens a dialogue where you can move the positions of the Novaline buttons "Archive", "Scan" and "File" to the right.

Enter the corresponding form type of the dialogue in the field "Formtype" (here 149=Offer) and the number of pixels by which the Novaline buttons should be shifted to the right in the field "Pixel". For the information of the form type the system information must be active in the settings of Business One.



Automatic scan call:

In this dialogue the automatic call of the Novaline scan dialogue can be set up for a document.

Enter the corresponding form type of the dialogue in the field "Formtype" (here 149=Offer). With this function the scan dialogue is automatically started after "Add".

Business partner number for own receipts:

An address is required for automatic archiving. In some Business One dialogues, however, the information of an address is missing (e.g. journal entries). It is possible to enter a business partner number that is used for automatic archiving in these cases. Enter the number of the business partner in the field.

User def. field name 1-5:

User-defined fields from Business One can be automatically adopted as user-defined fields in archiving. To do this, it is necessary to create the user-defined field in the archiving. (For more information see [5.2.2.6 User fields](#)).

The assignment of the user-defined field in archiving to the user-defined field in Business One is done via the same number of the field.

Example: If you want to adopt a user-defined field "Project number" in the archiving as user-defined field "1", enter the name of the field in the user-defined field "1" in the Novaline AddOn Configurator. This must begin with "U_".

User def. field for serial number:

This allows a serial number to be automatically adopted as a user-defined field in the archiving. Select the number of the user-defined field. This number must not be assigned in the above-mentioned user-defined fields, otherwise double assignment will occur.

Custom field for batch number:

This allows a batch number to be automatically adopted as a user-defined field in the archiving. Select the number of the user-defined field. This number must not be assigned in the above-mentioned user-defined fields, otherwise double assignment will occur.

Create custom fields for documents:

This checkbox activates the fields "Scancode" and "Dispatch by" in the Business One dialogues.

Create custom fields for production orders:

This checkbox activates the field "Scancode" in production dialogues.

Create custom fields for service calls and contracts:

With this checkbox the field "Scancode" can be set active in the service dialogues.

Create custom fields for payments:

This checkbox activates the field "Scancode" in the payment dialogues.

Custom fields for journal entries:

This checkbox activates the "Scancode" field in the journal dialogue boxes.

Create user-def. fields for framework agreements:

This checkbox activates the "Scancode" field in the framework agreements.

Create custom fields for opportunities:

This checkbox activates the field "Scancode" for opportunities.

User-def. fields for ZUGFeRD:

With this option it is possible to select which type of ZUGFeRD data should be attached to documents of the respective supplier in the user fields of the supplier.

ZUGFeRD-Daten	ZUGFeRD	
Leitweg-ID	0 -	Keine
	1 -	ZUGFeRD
	2 -	X-Rechnung

3.2 Personal.One index card

Deactivate Personal.One:

When set, this checkbox disables the "Personal" menu item in the Business One main menu.

3.3 Kore.One index card

Deactivate Kore.One:

When set, this checkbox disables the Cost Accounting menu item in the Business One main menu.

3.4 Database assistant index card

Deactivate database assistant:

When set, this checkbox disables the Database Wizard menu item in the Business One main menu.

3.5 Construction.One index card

Deactivate Construction.One:

When set, this checkbox disables the menu item "Construction.One" in the Business One main menu.

Create custom fields for job submission:

If this checkbox is activated, the user-defined fields "Object" appear in the title area. "LV-Group", "Position", "Supplier" and "Unit of Measure" appear line-related in the Business One dialogues.

3.6 Index card catalogue

Deactivate catalogue:

When set, this checkbox disables the "Catalogue" menu item in the Business One main menu.

Create custom fields for articles:

If this checkbox is activated, the user-defined fields appear in the title area. (see image on the right)

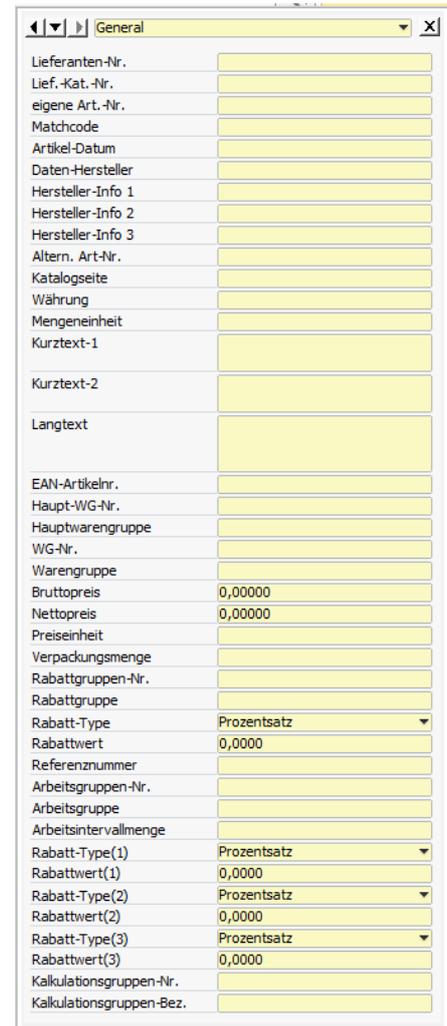
Price lists Designation:

Designation of the price list to be adopted.

Price takeover:

This sets how the prices are to be taken over from the catalogue:

- None: Prices are not adopted
- Standard price: Standard price of the price list is used
- Special price: Business partner special price is used
- Standard price and special price are used.



General	
Lieferanten-Nr.	
Lief.-Kat.-Nr.	
eigene Art.-Nr.	
Matchcode	
Artikel-Datum	
Daten-Hersteller	
Hersteller-Info 1	
Hersteller-Info 2	
Hersteller-Info 3	
Altern. Art.-Nr.	
Katalogseite	
Währung	
Mengeneinheit	
Kurztext-1	
Kurztext-2	
Langtext	
EAN-Artikelnr.	
Haupt-WG-Nr.	
Hauptwarengruppe	
WG-Nr.	
Warengruppe	
Bruttopreis	0,00000
Nettopreis	0,00000
Preiseinheit	
Verpackungsmenge	
Rabattgruppen-Nr.	
Rabattgruppe	
Rabatt-Type	Prozentsatz
Rabattwert	0,0000
Referenznummer	
Arbeitsgruppen-Nr.	
Arbeitsgruppe	
Arbeitsintervallmenge	
Rabatt-Type(1)	Prozentsatz
Rabattwert(1)	0,0000
Rabatt-Type(2)	Prozentsatz
Rabattwert(2)	0,0000
Rabatt-Type(3)	Prozentsatz
Rabattwert(3)	0,0000
Kalkulationsgruppen-Nr.	
Kalkulationsgruppen-Bez.	

3.7 Trigger index card

Create custom fields for item extensions:

This creates the user-defined fields "Catalogue price", "Price unit", "Cost group" and "Item description" in the title area for the Novaline Trigger in the item master data dialogue.

3.8 General index card

Deviating data path:

If the booking file of the transfer from Novaline Personal is not to be searched for in the standard directory, a folder can be specified here in which the booking file is expected. The add-on creates a subdirectory \DB-Name\Fibu in the folder specified here. DB-Name stands for the database name of the client. The booking file must be stored in the folder Fibu.

Log errors / log events / log programme calls:

These checkboxes activate a logging of the AddOn and should only be activated after consultation with Novaline for support purposes.

Glossary

Designation	Explanation
(Address) Browser	To browse" means "to turn the page". In conjunction with Novaline archiving the address browser displays address records.
Checkbox	Check box to switch on and off. If this <input type="checkbox"/> is empty, the status is deactivated. The checkbox is switched on with a single left mouse click and switched off again with another mouse click.
Hardcopy	Printout
Kannfeld	The input is allowed. It is not forced. Further editing is also possible without the content of an optional field.
Listbox	By opening this function the available selections are displayed in a list. By a simple left mouse click information can usually be selected for transfer.
Option field	<input type="radio"/> At least two commands are available for selection. Only one option can be selected by a mouse click. If you click on the other option, the first one is automatically deactivated.
PDF	Portable Document Format - platform-independent file format from Adobe. With the help of the Adobe Acrobat Reader, PDF files can be read on the web.
Mandatory field	The entry is mandatory. Otherwise the data records cannot be saved/processed.
Prefix	A sequence of leading symbols of a word
Screenshot	Screen print. Everything that is displayed on the screen can be filed as a "photo".
Button	The button can be clicked with the mouse. This executes a specific command/function.
Suffix	Coherent sequence of symbols at the end of a word
XML (format)	Abbreviation for Extensible Markup Language. Defines how data is stored in a structured way in text files. XML data structures are also understandable for other than the original application. Data can be exchanged between different applications independent of the platform.

Your Novaline team wishes you with Archiv.One much success!