

d.velop

d.velop inbound scan: User

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1. d.velop inbound scan: User

1.1. Basic information on the application

This chapter contains general product information and conventions regarding documentation.

1.1.1. About d.velop inbound scan

With d.velop inbound suite, you can edit your inbound invoices and documents in a uniform manner. d.velop inbound suite consists of different services and modules that interact. That means there are modules that accept different inbound formats and services that offer different editing options. Depending on which solutions or services you use to further process documents, the documents that are processed using d.velop inbound suite can be transferred to different target systems.

d.ecs inbound (on-premises) or the inbound app (hybrid, cloud) forms the core of d.velop inbound suite. The inbound app is used to edit the imported documents in a uniform manner. The following functions are available:

- Manually importing files from the file system
- Public interface for importing documents
- Combining several documents in one batch
- Recognizing barcodes and applying the values as document properties
- Simple and modern web interface for editing documents or batches
 - Displaying all the pages of documents
 - Rotating, moving, and deleting pages
 - Setting document separators
- Downloading documents as PDFs
- Connecting additional target systems for exports
- Public interface for exporting documents

1.2. First steps

Get to know the basic functions that will help you get started using the application. After you have taken the first steps, you can delve deeper into the functions. Learn more in the tips and tricks, find answers to frequently asked questions about the application, and gain knowledge about additional functions and settings.

1.2.1. Working with batches

So-called import batches or batches are used to import documents. A batch represents a processing operation. A processing operation can be an imported document, for example, or all the paper documents that have been collected throughout the day and that will be scanned tomorrow morning. These batches are used to prepare documents that are transferred to external systems or special processes.

A batch can only be processed by one user at the same time. The batch is automatically reserved for processing by the first user that opens it. The batch is now locked for processing by other users. If the first user switches or closes the batch, the reserved batch is released for processing by other users again.

1.2.2. Creating a new batch

Creating a new batch without a profile


You need to create a new batch to begin importing receipts or documents. Click **Scan** on the start page and select an import profile if necessary.

A new batch is created. You will see the details of the batch and can use it for further processing.

Creating a new batch with a profile

You can create a batch using an import profile. If you click **Create batch**, a batch is automatically created with the last selected import profile.

This is how you assign an import profile for automatically creating batches:

1. Click  (**Create batch with profile selection**).
2. Select the import profile that you want to assign to the batch. This import profile is used the next time that a batch is automatically created.

1.2.3. Opening a batch

You must open the batch containing the documents to further edit documents imported by other team members or to edit your own documents that have not been exported yet.

Open **Batch** on the start page and click the batch you would like to edit. For batches whose import process was already completed, you can specify whether you want to continue compiling the document (**Edit**) or entering the properties (**To indexing**).

1.2.4. Importing documents

You can import files from the file system.

This is how it works

1. In the opened batch view, select the file system (folder icon) as the source.
2. Now select the files that you want to import.

You have successfully imported the files. You see a summary of all the pages of a document as a preview so you can continue processing.

Alternatively, you can also add the files directly using drag & drop.

After you have imported all the pages into a batch, check whether the documents in the batch still need to be post-processed (for instance, by rotating pages or adding document separators). If the batch satisfies your requirements, you can continue with indexing. The documents are then subjected to an analysis process.

To continue with indexing, click **To indexing**.

Once you have opened the indexing, start the document processes after all the page analyses have been completed. During the document process, a category is usually assigned to the document automatically. Properties are automatically extracted and assigned to the document in the process.

You may not be able to use the quick access for indexing. However, you can activate the function using a feature flag.

1.2.5. Opening documents within a batch

You can assign documents to different categories and properties for subsequent processing or storage. In addition to automatic assignment through self-learning programs and artificial intelligence, you can also assign them manually.

To manually assign categories and properties, first make the desired changes to the documents. Once the import is complete, you can no longer make changes to the composition of the documents. You can then edit the categories and properties. While modifying the values, you receive assistance based on the data types to which the properties are mapped.

The available data types are:

- Text (alphanumeric)
- Numeric value (numeric)
- Date
- Date and time
- Currency

If the catalog responsible for the categories and properties is synchronized with document management, static datasets are taken into account. In the case of properties for which a static dataset is saved, the values that can be selected are limited to the dataset.

This is how it works

1. Click **To indexing**.
2. Select the document for which you want to make the changes.
3. Change the categories and properties accordingly, or add additional properties.
4. Delete any unnecessary properties.
5. Click **Apply**.

1.2.6. Installing d.velop scanner connector

You need to install d.velop scanner connector before you can use a scanner that is connected to the computer.

This is how it works

1. Open a new or existing batch.
2. Click on the scanner symbol and then on **Download d.velop scanner connector**.
3. Copy the base address to the clipboard.
4. Download the setup and execute it. Follow the instructions from the assistant.
5. Paste the URL you copied earlier under **Base address**.

After the installation, your scanner will be recognized and can be configured as a favorite scanner.

1.2.7. Adding a scanner

Before you can use your local scanner or shared network scanners, you need to set them as your favorite scanners. d.velop scanner connector must be installed.

This is how it works

1. Open a new or existing batch.
2. Click on the scanner symbol.
3. Choose **Manage favorite scanners**.
4. Look for the proper scanner in the list.
5. Click on the star symbol to add the desired scanner to the list of favorite scanners.

The scanners you have selected are now directly available to you as sources. If you connect your computer to another network, you need to add local scanners again.

1.2.8. Scanning a new document

You want to scan one or more pages and add them to a document. You must have a scanner that has already been set up.

This is how it works

1. On the start page, click **Scan**.
2. Select an import profile if necessary.
3. Select the scanner as the source.

4. Start the scan.
5. Complete the scanner configuration if you are using the scanner for the first time.

You want to carry out scanning directly with the last scanner you used. You must have performed scanning previously with a scanner that has already been set up.

This is how it works

1. On the start page, click **Scan**.
2. Select an import profile if necessary.
3. Start the scan using the icon for using the last scanner used.
4. The scan starts immediately.

1.2.9. Deleting batches

Delete a batch you no longer need.

This is how it works

1. In the batch or document list, open the actions for the batch that you want to delete.
2. Choose **Delete** and confirm the prompt.

1.3. Additional functions and settings

This chapter tells you about more ways to adjust and use the application for your purposes.

1.3.1. Working with document separators

Before the export, you can determine the point at which the imported pages are separated into individual documents. To do this, add document separators. You can also use the document separator to export several documents from a batch at once.

This is how it works

1. Position your mouse pointer at the space between two pages where you want to add a document separator.
2. Click on the plus sign that appears between the pages on a dotted vertical line.

You can remove document separators that have been added, for instance, if you accidentally added a document separator at the wrong point.

This is how it works

1. Hover your mouse pointer over the document separator that you want to remove.
2. Click on the trash bin symbol that appears in place of the document separator.

1.3.2. Selecting the target system

After you index a document, you can transfer it to a target system.

This is how it works

1. Select the documents you would like to save.
2. Click **Save selected documents** or **Save current document**.
3. Select the desired target system.

The selected documents are transferred to the target system.

1.3.3. Editing PDF documents in d.velop documents

You can edit PDF documents in document management. For example, you can add additional pages or divide the document.

This is how it works

1. Open a PDF document, such as using the search.
2. Select the context action **Open document in d.velop inbound**.
3. Edit the document.
4. Export the edited document. When you do so, you can update the open PDF document or store it as a new document.

1.3.4. Editing pages

You can edit pages in a batch in various manners.

The following functions are available to you:

- Rotating pages
- Moving pages within a batch
- Deleting pages from a batch
- Renaming documents
- Creating and changing category assignments

Rotating pages

When you import documents, the pages may be rotated the wrong way. You can rotate the pages to make them readable. You can rotate pages 90° to the left or right.

This is how it works

1. Select the pages you want to rotate.
2. Click the button for rotating pages in the toolbar.

You have successfully rotated the pages. You can repeat this process as often as you need.

Unpacking compressed files

You can unpack compressed files such as ZIP and RAR files within a batch.

This is how it works

1. Import the compressed file into a batch.
2. In the thumbnail view, click on the unpack symbol. Alternatively, you can use the keyboard combination **Alt + Shift + U**.

You have unpacked the compressed file. The original compressed file remains in the batch.

Deleting pages from a batch

Delete the pages you do not need in a batch.

This is how it works

1. Select the pages you would like to delete.
2. Click on the trash bin icon in the toolbar near the documents and confirm the action.

The pages are no longer part of the batch.

Moving pages within a batch

If you want to combine documents or if pages were imported in the wrong sequence, you can move individual pages. You can move pages to the right or left of their current position.

This is how it works

1. Select the pages you would like to move.
2. In the toolbar, click the arrow symbols to move a page in the direction in which the arrow is pointing.

If you move pages from different documents or pages that are not consecutive, they will be positioned beside each other after you move them.

1.3.5. Automatically assigning categories and properties

Your documents can be assigned to categories automatically. Properties may also be added for the document. The automatic assignment is based on a program that learns autonomously through artificial intelligence.

To assign categories and properties automatically, you must finish importing the batch. First, make all the desired changes to the composition of the documents. In particular, that includes adding, moving, rotating or deleting pages and adding or removing document separators. When you finish the batch, you initially can no longer perform these processing steps.

This is how it works

1. Click **To indexing**. The batch is now locked for further manual processing.
2. Wait for the automatic assignment of categories and properties.
3. Make any necessary corrections to the automatically assigned categories and properties.

1.3.6. Renaming documents

You can rename documents to provide a more descriptive name, for example.

This is how it works

1. Open the properties of a document using the pencil symbol on the first page of the document.
2. You can change the document name under **Document**.
3. Click **Savechanges** to save your changes.

1.3.7. Exporting documents

You can use the feature **Scan** to import new documents into a batch or combine existing documents. You can process documents further using a batch. Once a batch has been completely processed, you can transfer it to a specialized process for safe storage or further processing. These systems or processes are called target systems.

You can download the documents in a batch onto your computer by default. Depending on the other services in your company, you can select additional target systems to which you can transfer the documents.

Once you complete the import, you can download the documents immediately for further processing.

Downloading documents as a ZIP file – This is how it works

1. Select the documents you would like to save.
2. Click **Save selected documents** or **Save current document**.
3. Select **Download file** as the target system.
4. For every document, select whether the document should be deleted from the batch after the export.
5. Click the button **Download and close**.

The selected documents are downloaded. If you process multiple documents, they are provided in a ZIP file. Depending on the settings you select, the exported documents are deleted from the batch.

You can also download documents individually.

Downloading documents individually – This is how it works

1. Select the document you would like to save.
2. Open the additional functions (three-dots menu) for a document.
3. Click **Download**.

The document is downloaded. To ensure that the document can still be processed in the batch, it has not been deleted from the batch.

1.3.8. Sharing batches

If you want to enable other users or groups to edit a batch, you can share the batch.

This is how it works

1. In the batch or document list, open the actions for the batch that you want to share.
2. Click **Share**.
3. Select the user or group with whom you want to share the batch.
4. You can optionally create a task for the user or group.

The batch can now be edited by the user or group.

1.3.9. Scanning to dossiers

You can import paper documents or other inbound documents into digital dossiers.

This is how it works

1. Open a digital dossier, such as from your favorites.
2. Choose the context action **Scan**.
3. Import the documents as you usually do using the feature **Scan**.
4. Save the imported document to the dossier.

1.3.10. Quick import

You can skip the file composition and go directly to the entry of properties (indexing).

This is how it works

1. In the import widget on the dashboard, choose **Browse**.
2. Select the files that you want to import.

Following the successful import, you are automatically guided on to the indexing step.

Alternatively, you can also add the files directly using drag & drop.

1.4. Tips and Tricks

This topic informs you about additional options that the application offers to help you reach your goal faster.

1.4.1. Displaying detailed properties

You can display the properties of a document, page or batch in the preview window.

Click on the pencil symbol on the first page of a document to display the properties.

Properties whose values exceed 7000 characters are truncated to 7000 characters. This truncation takes place during both manual and automatic property assignment.

In certain constellations, the maximum length can be only 2000 characters. For more information, please contact your administrator.

1.4.2. Making corrections to completed batches

You can reedit documents that have been incorrectly merged.

This is how it works.

1. Click **Edit**.
2. Make all the desired changes to the documents.
3. Choose **To indexing** to complete the import process again.

1.4.3. Useful things to know about the batch status

The status of a batch describes the current state of the batch. The status is displayed both in the batch list and in the batch details.

The following statuses are available:

- **Processing**Batches with this status are still being processed. The import has not yet been completed. You can usually edit pages and add document separators manually.
- **Indexing**
The import has been completed. You can index and save the documents. You can now no longer edit pages or add document separators.
- **Exporting**
The batch is automatically exported. You cannot make manual changes to the documents.
- **Export failed**
The automatic batch export has failed. Save the documents manually.

1.5. Frequently asked questions

This chapter contains answers to frequently asked questions.

1.5.1. Why can't I see a preview for my file?

For some files, a preview of the file content is not displayed in the batch. Instead, only one page with an icon for the file format is displayed, regardless of the actual number of pages in the file.

This behavior occurs for file formats that cannot be displayed. It is also not possible to edit pages or automatically detect properties for these formats.

Your administrator can specify whether or not adding such file formats is permitted for the individual import profiles.

1.5.2. What do I do if the page analysis fails?

The page analysis for individual pages may occasionally fail. You can identify such pages by an icon with an exclamation mark.

The page analysis is usually performed automatically after you add a page, unless the analysis is explicitly disabled by your administrator. Depending on the configuration, the analysis includes recognition of full text (OCR), barcodes and the first page in the document using artificial intelligence. In certain circumstances, the page analysis is a prerequisite for automatic document splitting and the automatic assignment of categories and properties.

You can still continue processing a batch if the page analysis fails. In such a case, however, functions may be impaired and a large amount of time and effort may be involved due to the extra manual work.

In the event of an error, d.velop recommends restarting the page analysis before you continue processing the batch.

This is how it works

1. Click the icon with the exclamation mark on the page for which the page analysis failed.
2. Wait for the page analysis to run.

1.5.3. Why can't I edit pages or document separators?

In some cases, you cannot rotate, move or delete pages. It is also not possible to add or remove document separators under certain circumstances.

You can find possible causes below:

- You have already completed the import: Switch the batch to editing mode to make corrections.
- The batch import profile does not permit document editing: Check whether you have selected the correct import profile for the batch. If the mapping is correct, contact your administrator.
- You have imported a protected PDF file: You can identify protected documents in d.velop inbound suite by the small lock icon next to each page. In the case of protected documents, there are technical measures that prevent the editing of pages. You can only remove all the pages in the document. In addition, you cannot remove the document separators before and after the document or add them within the document.
- You have imported a file that cannot be displayed: You can identify these documents from the fact that, instead of the file content, only an icon for the applicable file format is displayed. You cannot remove the document separators before and after the document. You can only remove the whole document.

1.5.4. Why do document separators appear automatically even though I have not set them?

When you upload multiple documents at once, document separators that you did not add yourself may be inserted automatically. The software detects the start of new documents and sets document separators accordingly. You still have the option of adding or removing any document separators manually.

1.5.5. How can I open the page preview in the batch?

You can open the preview of a page by double-clicking on the respective page.

1.6. Additional information sources and imprint

If you want to deepen your knowledge of d.velop software, visit the d.velop academy digital learning platform at <https://dvelopacademy.keelelearning.de/>.

Our E-learning modules let you develop a more in-depth knowledge and specialist expertise at your own speed. A huge number of E-learning modules are free for you to access without registering beforehand.

Visit our Knowledge Base on the d.velop service portal. In the Knowledge Base, you can find all our latest solutions, answers to frequently asked questions and how-to topics for specific tasks. You can find the Knowledge Base at the following address: <https://kb.d-velop.de/>

Find the central imprint at <https://www.d-velop.com/imprint>.