d.velop

d.velop inbound scan: User

Table of Contents

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.

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

1. Select an import profile under **Import profile**. A new batch is automatically created with the selected import profile.
2. Click on the plus symbol to create a new batch with the selected import profile.

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. 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.

1.2.6. 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.

1.2.7. 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.

1.2.8. Deleting a batch

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. More functions and settings

This topic contains functions and settings that users could need in certain situations. Users already know about the basic functionalities and want to learn about additional functions.

1.3.1. Editing PDF documents in d.3one

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.

1.3.2. 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.

Renaming documents

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

This is how it works

1. Click on **Toggle preview > Display properties** to open the properties of a document.
2. You can change the document name under **Document** if you wish.
3. Click **Savechanges** to save your changes.

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.

1.3.3. 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.

1.3.4. 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.

1.3.5. 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.

1.3.6. Sharing batches

If you want to adjust other users' or groups' permissions for a batch, you can use the **Share** dialog.

This is how it works

1. In the batch or document list, open the actions for the batch for which you want to adjust the permissions.
2. Click **Share** or **Share all**.
3. Adjust the permitted users and groups for the batch. You cannot remove the user who created the batch.
4.   **Note**

   To ensure access to the batch, specify at least one user or group.

5. You can optionally create a task for specific users or groups.

The permissions are subsequently updated.

1.3.7. 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.

1.3.8. 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.

1.3.9. Quick import

You can skip the file compilation via the import widget and go directly to the entry of properties (indexing).

Configuring the widget "Import"

You can define up to four drop zones for the **Import** widget. By default, the import widget profile is set so that the batch view is skipped.

This is how it works

1. In the **Import** widget, click on the three vertical dots and then on **Settings**.
2. Specify the corresponding import profiles for the drop zones.
3. Specify whether the batch view should be skipped for the corresponding drop zone.
4. Click **Save**.

Quick import

If you have configured an import profile using the **Import** widget to import files quickly, you can then select the import profile when importing files.

This is how it works

1. In the **Import** widget, click **Browse**.
2. Select the corresponding import profile.
3. Select the files that you want to import.

Alternatively, you can drop the files in the corresponding drop zone using drag & drop.

If no import profile is available, the import widget profile is used in the **Import** widget.

1.3.10. Renaming batches

If you want to change the name of a batch, you can rename the batch.

This is how it works

1. In the batch or document list, open the actions for the batch that you want to rename.
2. Click on **Rename**.
3. Enter the new name.
4. Click **Save**.

1.4. Tips and tricks

In this topic, you will find out about more ways this application helps you to reach your goal more quickly.

1.4.1. Displaying detailed properties

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

This is how it works

1. Select the page for which you want to display the properties.
2. Click on **Toggle preview > Display 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. Keyboard control of the thumbnail view in batch processing

This is how you control the thumbnail view in batch processing via keyboard:

- **Left arrow key** or **Right arrow key**: Navigate between the pages or in-between sections.
- **Home key** or **End key**: Navigate to the first or last page of a document.
- **Page up key** or **Page down key**: Jump to the first or next page of the previous document.
- **ENTER key**: Open preview
- **Space bar** (in the thumbnail view)**:** Activate or deactivate the combo box of the page
- **Space bar** (in the in-between section): Insert document separator
- **ESC**: Cancel analysis
- **ALT+SHIFT+A**: Restart analysis
- **ALT+SHIFT+U**: Create ZIP file
- **Tab key**: Moves the focus completely out of the thumbnail view to the next focusable item.

1.4.3. 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.

1.4.4. 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.

1.4.5. Useful information to know about keyboard controls in the list view

In the list view, you can use various keyboard shortcuts to perform actions. For instance, you can use the keyboard to navigate in the list, select list items or open the details of an item.

Navigation

You can navigate within the list view.

Use the arrow keys or the other keys for controlling the cursor (focus) to switch to another cell or list item.

- **Down arrow**: Focuses on the next list item.
- **Up arrow**: Focuses on the previous list item.
- **Home key**: Focuses on the first list item.
- **End key**: Focuses on the last list item.
- **Page up key**: Moves the focus one page up.
- **Page down key**: Moves the focus one page down.

Selection

You can select items in the list view.

- **Space bar** or **Shift+space bar**: Selects the list item in focus. If the list item is already selected, the selection is cancelled (activates or deactivates the checkbox).
- **Shift+Down arrow**: Selects the list item that is in focus and the next list item. Then focuses on the next list item (activates the checkbox).
- **Shift+Up arrow**: Selects the list item that is in focus and the previous list item. Then focuses on the previous list item (activates the checkbox).
- **CTRL+A**: Selects all the list items if they have not all been selected yet. If all the list items are already selected, the selection is cancelled (activates or deactivates the checkboxes).

Sonstiges

You also have the following additional control options:

- **ENTER key**: Opens the details of the item in focus.
- **Context menu key** or **Right arrow**: Opens the context menu for the item in focus.
- **Tab key**: Moves the focus from the list to the next item that can be focussed on.
- **2 x CTRL key:** Shows the accessibility options. Here you can activate the focus border, deactivate animations and enable the contrast view.
- **F6**: Navigates through the various areas of the application (e.g. the content area of a document and the context action). This function has the best effect when you have activated the focus border. You can use the arrow keys to adjust the size of the areas.
- **Shift+F6**: Navigates backward through the various areas of the application. This function has the best effect when you have activated the focus border.

1.4.6. Things to know about keyboard control in the table view

In the table view, you can use various keyboard shortcuts to perform actions. For instance, you can use the keyboard to navigate in the table, select rows or open the details of an item.

Navigation

You can navigate within the table view.

Use the arrow keys or the other keys for controlling the cursor (focus) to switch to another cell or row.

- **Down arrow**: Focuses on the next row.
- **Up arrow**: Focuses on the previous row.
- **Right arrow**: Focuses on the next cell. If you are already focused on the last cell in the row, nothing happens.
- **Left arrow**: Focuses on the previous cell. If you are already focused on the first cell in the row, nothing happens.
- **Home key**: Focuses on the first row.
- **End key**: Focuses on the last row.
- **Page up key**: Moves the focus one page up.
- **Page down key**: Moves the focus one page down.

Selection

You can select items in the table view.

- **Space bar** or **Shift+space bar**: Selects the row that is in focus. If the row is already selected, the selection is cancelled (activates or deactivates the checkbox).
- **Shift+Down arrow**: Selects the row that is in focus and the next row. Then focuses on the next row (activates the checkbox).
- **Shift+Up arrow**: Selects the row that is in focus and the previous row. Then focuses on the previous row (activates the checkbox).
- **CTRL+A**: Selects all the rows if they have not all been selected yet. If all the rows are already selected, the selection is cancelled (activates or deactivates the checkboxes).

Other

You also have the following additional control options:

- **ENTER key**: Opens the details of the item in the selected row.
- **Context menu key**: Opens the context menu for the item in the row that is in focus.
- **Tab key**: Moves the focus from the table to the next item that can be focussed on.
- **2 x CTRL key:** Shows the accessibility options. Here you can activate the focus border, deactivate animations and enable the contrast view.
- **F6**: Navigates through the various areas of the application (e.g. the content area of a document and the context action). This function has the best effect when you have activated the focus border. You can use the arrow keys to adjust the size of the areas.
- **Shift+F6**: Navigates backward through the various areas of the application. This function has the best effect when you have activated the focus border.

1.4.7. Useful information about keyboard controls in lists in d.velop inbound

The keyboard shortcuts listed under "Useful information to know about keyboard controls in the list view" can also be used for the lists in d.velop inbound. There are also special lists that you can operate with additional shortcuts using keyboard controls.

Enriched lists:

Enriched lists are lists that contain additional controls and can be selected using checkboxes.

If an action is available for a list:

- **Enter**: Executes an action for the list item.
- **Space bar** (if a selection is not possible): Executes an action for the list item.

If a selection (by checkbox) can be made in a list:

- There is no option to move the focus to the checkbox.
- **Space bar**: Selects or deselects the current list item, i.e. the checkbox is activated or deactivated.

If there are additional controls (e.g. three vertical dots):

- **Right arrow**: Moves the focus (in a logical order) to the next possible control. If the focus is on the last possible control, the focus does not move.
- **Left arrow**: Moves the focus (in a logical order) to the previous possible control.
  - If the focus is on the first possible (additional) control, the focus moves back to the list item.
  - If the focus is on the list item itself, the focus does not move.
- **ENTER key**: Performs the action of the control. Patterns of the control are followed as long as the patterns match the control of the list.

Lists for which drag & drop is possible:

- **CTRL+X** (Windows) or **CTRL+X** (Mac): Cuts an item.
- **Up arrow** or **Down arrow**: Moves the cursor to the position where the cut item is to be pasted.
- **CTRL+V** (Windows) or **CTRL+V** (Mac): Pastes an item.

1.4.8. Useful information about keyboard controls for the toolbars

The information below tells you how to use keyboard controls in the toolbar:

- **Left arrow key** or **Right arrow key**: Navigates between the items in the toolbar.
- **Tab key**: Moves the focus from the toolbar to the next item that can be focussed on.

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.

1.6. 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.keelearning.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.