Product Description
d.velop inbound scan
(on premises/cloud)

1 Summary

This product description describes the product-specific functions of d.velop inbound scan (on premises/cloud).

Services relating to support and maintenance of d.velop inbound scan (on premises/cloud) are described in the "Service Description Support and Maintenance On Premises" or "Service Level Agreement Cloud and SaaS."

2 Definitions

Batches and batch processing

A batch refers to a collection of pages (max. 500) that have been imported in the import area by scanning or uploading. A batch is not automatically saved in d.velop documents, but must first be indexed during batch processing and then saved as one or more documents in d.velop documents. Batches can be processed manually or automatically.

Document separation

During batch processing, the pages of a batch can be separated into several documents, which can then be indexed and saved as individual documents in d.velop inbound scan.

Categories, document types, dossier types

Documents and dossiers always have exactly one category in d.velop inbound scan. Category is the generic term for the document type or dossier type. A category is defined by a set of properties, which can be customized as necessary. Using the category's properties, the customer can control, among other things, access permissions and automatic dossier generation.

Properties/metadata

A document or dossier contains properties (known as metadata) that describe it in more detail. Properties are divided into "common properties" (properties that are the same for all categories) and "advanced properties" (properties that are individual and category-specific). The latter can be created by the administrator according to the customer's needs. Information about versions, history, notes and annotations are stored as metadata for documents and dossiers.

3 d.velop inbound scan Scope of Functions

d.velop inbound scan enables documents to be digitized and indexed, by adding metadata to the document. These documents can then be transferred to a repository, e.g. d.velop documents, for long-term storage.

d.velop inbound scan enables the customer to digitize their incoming paper invoices. Using a local or network scanner, the customer can scan individual documents or even a whole day's worth of documents in a single job. Scanning errors can be corrected using the editing interface. Pages can be rotated or deleted. New pages can also be added or files can be imported manually from the file system. Batches created via other input channels can also be edited. The user interface can also be used to insert document separators in order to group related pages into separate documents. The customer has the option to download these documents as PDF files. Additional input channels can be added to d.velop inbound scan by purchasing additional services.

3.1 Scope of functions

3.1.1 Functional area: Incoming documents

(Batch-based) scanning (local or network scanner)

The customer can scan documents with local or network scanners and import them into d.velop documents as a scan batch. Permissions can be used to control which users in the organization can view the scanned batches.

E-mail archiving via e-mail inboxes

The customer can set up 'function mailboxes' which can be reached via a separate e-mail address. E-mails can be forwarded to these mailboxes, where they, along with their attachments, can be further processed in d.velop inbound scan according to configured rules (directly or via manual batch processing), enriched with static metadata and saved.

If the customer uses this function as a cloud service as part of a hybrid system (technical inbound e-mail), then an unlimited number of function mailboxes are available. E-mails must be no larger than 30 MB, including attachments.

If the customer uses the function in a purely on premises system (technical content crawler), then only one mailbox is available to each user (personal mailboxes).

Barcode recognition for properties

d.velop inbound scan can be configured to read barcode values on documents during the import process and automatically save them in defined metadata fields. The customer can treat different types and orientations of barcodes differently by defining barcode profiles. The following barcode types are supported: Codabar, data matrix, EAN-8, EAN-13, QR code, RSS-14, RSS-Expanded, UPC-A, UPC-E, Code 128, Code 93, Code 39 and ITF.

Document separation using barcodes/QR codes

The customer can configure d.velop inbound scan to automatically set document separators based on barcodes. A barcode indicates the point at which the document is to be separated. After successful separation, the page with the barcode can be deleted, if necessary, and the barcode text can be copied into a property.

Property recognition with barcodes/QR codes

The customer can configure d.velop inbound scan to automatically recognize properties based on barcodes. The property is then filled with the text that was read by the barcode engine. The text can be manipulated using regular expressions.

Reading xRechnung invoices (CII and UBC types)

Documents of type CII and UBC (electronic invoices or invoices in the xRechnung XML format) can be imported with d.velop inbound scan. These documents are displayed in the batch processing and document management areas in a human-readable format. During the import process, invoice information from electronic invoices can be evaluated via defined rules and saved as metadata for the document.

Manual document upload

Documents can be uploaded manually into d.velop inbound scan. To do this, the customer can either select one or more documents on the hard disk and upload them, or drag & drop them into the inbound scan entry mode. This is located on the dashboard behind the widgets "Scan," "Import" and "Batch." The Import widget enables the quick and easy indexing of individual documents.

Editing pages during import

Before saving imported documents in d.velop documents, the customer can edit them during batch processing. Page editing includes rotating, moving and deleting. By setting document separators, the customer can determine

how many and which of the pages are to be saved as individual documents in d.velop documents. Document separation can also be configured so that a document is always separated after a defined number of pages.

Optical character recognition (OCR)

When PDF documents are imported and where technically feasible, the system automatically carries out optical character recognition (OCR) to generate machine-readable text from text that is not machine-readable. The OCR data is stored with the document and thus enables functions such as full-text searches of scanned documents. OCR is not possible with faulty scans or images.

Pages should be scaled to 300 dpi to obtain the best possible result when reading out the information. Insufficient scaling can lead to text recognition errors.

Document separation using regular expressions

The customer can configure d.velop inbound scan to automatically set document separators based on regular expressions. A regular expression indicates the point at which the document is to be separated.

Property recognition using regular expressions

The customer can configure d.velop inbound scan to automatically recognize properties based on regular expressions. The property is then filled with the text that was read by the OCR and matches the regular expression.

Automatic storage in the document management system

By configuring import profiles and DMS settings, the customer can specify that incoming documents are automatically saved in d.velop documents according to defined rules (i.e. without further manual effort required) and sorted into the correct dossiers. Repositories other than d.velop documents can also be used, such as SharePoint.

AI-based automatic separation of document batches

The customer can have document separators set automatically by using d.velop's own AI service, provided they have purchased this service separately. This service attempts to recognize the points in a batch of pages where a new (logical) document starts and sets the document separator there. The recognition accuracy depends on the type of document and is below 100%. It is necessary to check the separation manually.

For on-premises systems, this function is only available as a cloud service via a hybrid connector.

AI-based automatic categorization of documents

The customer can have a document's category determined automatically using d.velop's own AI service, provided they have purchased this service separately. The service attempts to identify the category of the imported document and saves the category in the document properties. The three most likely categories are offered for selection, with the most likely category preselected. The recognition accuracy depends on the type of document and is below 100%. It is necessary to check the categorization manually.

For on-premises systems, this function is only available as a cloud service via a hybrid connector.

Import via REST API (interface)

Documents can be imported and the associated categories and properties transmitted via a documented public programming interface (Public REST API).

Automatic keywording/content indexing (invoice data)

For invoice documents, the customer can have the invoice data recognized automatically by using d.velop's own AI service. The service attempts to recognize invoice data and then writes it to the document properties during the import process. Currently, the following invoice data can be recognized: invoice number, invoice date, invoice amount and IBAN. The recognition accuracy depends on the type of document and is below 100%. It may be necessary to check the recognition manually.

For on-premises systems, this function is only available as a cloud service via a hybrid connector.

3.1.2 Functional area: Document management and archiving

Viewer for different file formats

The customer can view documents in d.velop inbound scan directly in the web client. We offer this option for the following file types: pdf, jpg/jpeg, png, bmp, gif, tif/tiff, heic, heif. The following formats are only available as a cloud service via a hybrid connector: doc, docx, dot, dotx, xls, xlsx, xlsb, ppt, pptx, pot, potx, rtf, dgix, msg, eml, xml(cii/ubc), ZUGFeRD.

PDF editing

The pages within a PDF document can be rotated, moved and deleted.

3.1.3 Functional area: Workflows and business processes

Share/forward batches (document import)

The customer can forward imported batches to another person who has access to d.velop documents. The user has the option to create a task with a task text for this person. The original user also retains access to the batch. A batch can only be processed by one person at a time. If a batch is being processed, other persons will receive a corresponding notification message if they attempt to process the batch.

Use with different devices (smartphone, tablet, PC)

The user interfaces of d.velop inbound scan have a responsive design that allows content to be correctly displayed in a browser on mobile devices such as smart phones or tablets.

Multiple languages and translation option

d.velop inbound scan can be used in the following languages: Croatian, Czech, Danish, Dutch, English, Chinese (simplified), French, German, Italian, Polish, Serbian, Slovakian and Spanish. The language displayed is determined by the selected browser language. The customer also has the option to translate custom-created categories and properties into these languages.

3.2 Technical requirements

For on premises operation, the following system requirements apply: https://portal.dvelop.de/documentation/rmdd/latest/en/systemvoraussetzungen.