

The logo graphic for PROXESS 10 features a large, stylized 'X' formed by overlapping, rounded rectangular shapes. The background of the logo is a gradient from blue on the left to green on the right, with the 'X' shape rendered in a lighter, semi-transparent blue/green color.

PROXESS 10

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DOCUMENTATION PROXESS SCAN CLIENT

Status: PROXESS 10 Release 2020R2

Table of contents

| | |
|---|----|
| About this documentation | 4 |
| Copyright | 4 |
| Conventions | 5 |
| PROXESS Scan Client | 6 |
| About PROXESS Scan Client | 6 |
| Logging in and first steps | 7 |
| Login | 7 |
| First steps | 10 |
| Digression: PROXESS updates | 11 |
| Digression: Profile management with SQL database | 12 |
| Scan profiles and settings | 14 |
| New profile | 14 |
| PROXESS | 16 |
| Transfer | 19 |
| Document and barcode | 21 |
| 2D barcode configuration: | 23 |
| Barcode validator | 26 |
| Fields | 28 |
| Field properties | 32 |
| PROXESS_query_field | 33 |
| PROXESS_result_field | 33 |
| Entry_fixed_value | 34 |
| Barcode mask | 34 |
| Xtract settings | 36 |
| Advanced properties | 39 |
| Export and import scan profiles (via XML) | 43 |
| Distribute scan profiles via PROXESS Management Console | 44 |
| Locally distribute scan profiles | 47 |
| Digression: Scan profile names | 49 |
| Scan Client window | 50 |
| Menu of PROXESS Management Console | 50 |
| Window area_Open jobs | 51 |
| Released jobs window section | 52 |
| Window_area_released_jobs_ | 52 |
| File menu | 54 |
| Settings menu | 55 |
| Overview of the Scan Client start window | 57 |
| Window area_New job | 59 |
| Scanning and archiving | 61 |
| Structure of the editing window | 61 |
| The_image_menu_icons_ | 63 |
| Menu_barcode_options: | 64 |

Transfer to the archive 66

Document management 67

 Indexing_fields 69

 Indexing_with_the_PROXESS_Index_Miner 69

Document import 72

Scanner settings 76

Barcode recognition (settings) 79

FAQs 81

Keystroke combinations—shortcuts 82

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Conventions in this documentation

A note for female users:


For better legibility, we are omitting the explicitly separate mention of male and female users in this documentation. However, we want to expressly point out that we always refer to both women and men.

Highlights in the text


Highlights are used in this documentation as follows:

| | |
|-------------------|--|
| Bold | Refers to menu commands, buttons, field names, options and program groups. Examples: the New command, in the Name field |
| “Quotation marks” | Refer to menu titles, folder names and dialog fields. Examples: the “User” menu, the “Smartcards” folder, the “Set password” dialog field |
| UPPERCASE LETTERS | Are reserved for the representation of keys. Examples: RETURN key, ALT key |
| (Brackets) | Show that a placeholder symbol is meant. Examples: (%) () during the PROXESS search |

Tips

| | |
|---|---|
|  | Show you particularly convenient options for the operation or useful additional information. Tips are always represented as they are in this paragraph. |
|---|---|

Warnings

| | |
|---|--|
|  | <p>Are displayed for actions that could result in significantly more work or might even lead to data loss or other material damages. Warnings are shown by this symbol:</p> <p>You should read the warnings very carefully before you continue working.</p> |
|---|--|

You can find the PDF help file in your local Windows help directory.

About the PROXESS Scan Client

PROXESS Scan Client is a scanning module for all common twain scanners. With the PROXESS Scan Client, paper documents can be scanned online or offline and delivered to PROXESS for archiving or forwarded for further processing with PROXESS Xtract document recognition.

Integrated barcode recognition enables automatic document separation and document indexing.

There is an option for time-controlled automated transfer of the data to the archive system (offline archiving).

The handling and processing of documents is simplified through freely definable profiles that can be saved.

Also see:

[First steps](#)

Login

After the PROXESS Scan Client is installed, no login information is available for the initial activation.

The following login mask appears:

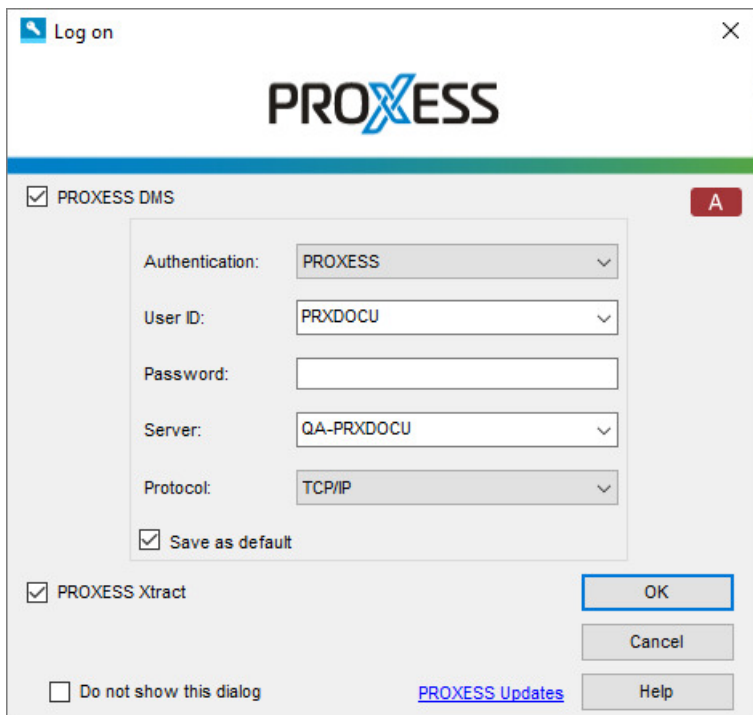


Fig.: The PROXESS Scan Client login mask (already with entries in this example)

The following entries are necessary for login:

| | |
|------------------------------|--|
| <p>PROXESS DMS</p> | <p>The scan profile settings determine whether the documents should be transferred to PROXESS DMS.</p> <p>If this option is active, all scan profiles for which this kind of archiving to PROXESS has been set up will be displayed after login.</p> <p>If the option is deactivated, these scan profiles will not be shown after login.</p> <p>Also see the option “PROXESS Xtract” further below</p> |
| <p>Authentication</p> | <p>PROXESS: Enter your PROXESS user name and password and log in with these. The prerequisite for this login is that the PROXESS system administrator has registered you as a PROXESS user.</p> <p>Windows: The system automatically applies your Windows login information to the PROXESS login. The prerequisite for this login is that your PROXESS system administrator has previously registered and configured your Windows user account in PROXESS (Active Directory integration).</p> <p>If necessary, ask your system administrator about the authentication option you should use.</p> |
| <p>Server</p> | <p>Enter the name or IP address of the desired PROXESS server here.</p> |

| Documentation PROXESS Scan Client | |
|-----------------------------------|--|
| Password | Enter your password here. Changing your own password is possible e.g. in the PROXESS program. |
| Users | Enter your short user name for PROXESS here (e.g. "Miller"). |
| Protocol | Select the network protocol to connect to the PROXESS server here. PROXESS offers TCP/IP and Named Pipes as protocol sequences. If the installation is for a single workplace or if the client and server are installed on the same computer, select the option "Local server". |
| Save as default | When this option is activated, the last entered user information, except the password, is displayed again for the next login. |
| PROXESS Xtract | <p>The scan profile settings determine whether the documents should be transferred to PROXESS Xtract for processing. If they are to be transferred, the "Xtract" tab must always be completed when the profile is created.</p> <p>If this option is active, all scan profiles for which further processing with PROXESS Xtract has been set up will be displayed after login.</p> <p>If the option is deactivated, these scan profiles will not be shown after login.</p> <p>Also see the option "PROXESS DMSt" above.</p> |
| OK | Confirm your login information with OK. |
| Cancel | Use Cancel to terminate the login without saving your login information. |
| Help | With Help, you can access the online help. |
| Do not show this dialog | If this option is activated, the login mask will not be displayed the next time the program is started and the most recently saved login information and settings will be used. In the start window of PROXESS Scan Link, you have the option to reactivate them with the "File" menu and the Show login mask command. |
| PROXESS updates | <p>Metadata update: You can use this to activate the automatic metadata update. This performs an automatic and time-controlled update of metadata acquired from the PROXESS archives—such as document types, thesaurus and index fields—during login. The option is deactivated by default.</p> <p>Automatic profile matching during login: Scan Link profiles can be set up on the server via the PROXESS Management Console and distributed to various user groups. By default, the scan profiles on the server are accessed and matched with the status of the workstation at login. This can delay the login process. For that reason, the automatic profile matching can be deactivated here and activated only temporarily, for example, after the configuration tasks have been performed.</p> <p>Also see: Digression: PROXESS updates</p> |

Enter the login information and select the OK command.



When the program is started, an error message is displayed: "Updating the database structure failed."

Possible cause: The program can't be started as the user doesn't have full access to the Scan Links database in the PROXESS installation directory. The logged-in Windows user should therefore receive local administrator rights.

Also see:

[First steps](#)

[Digression: PROXESS updates](#)

First steps

Start the program PROXESS Scan Client from the PROXESS program group and [log in if necessary](#).

The main window of the PROXESS Scan Client will open.

Before the first scan, you have to create a [new profile](#) or import an existing profile.

Highlight the created profile and select the [new job](#) command or select the profile with a double click. The [scan editing window](#) will open.

You are automatically at the first processing step, "[Import](#)".
Scan your documents or acquire scanned files from a folder.

Now switch to the second processing step, "[Document management](#)".
Here you can make corrections for the document binding and index documents via the "Fields" tab on the right side.

Now go to the "[Transfer](#)" processing step.
Depending on the settings applied in the scan profile, you can transfer the scanned documents to the archive here or transfer them to the downstream document processing with PROXESS Xtract, or you can release the current scan job for a time-controlled transfer to the archive.

Now your documents are archived in PROXESS and can be edited further with PROXESS Xtract.

Digression: PROXESS updates

Clicking the “PROXESS updates” entry in the login dialog opens the following settings dialog:

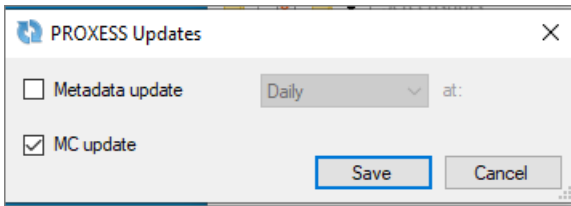


Fig.: Update options for user login

Metadata update:

You can use this to activate the automatic metadata update when logging onto the system. This performs an automatic and time-controlled update of metadata acquired from the PROXESS archives, such as document types, thesauruses and index fields.

Examples:

The “PROXESS updates” option is activated with the setting “Daily” at “9:00 a.m.”

This is followed by an update of the PROXESS metadata, even if the login for the PROXESS Scan Client is after 9:00 a.m.

The “PROXESS updates” option is activated with the setting “Every Wednesday” at “09:00 a.m.”

If the PROXESS user does not log into the PROXESS Scan Client on a Wednesday but only on Thursday, the metadata are updated only on Thursday.

The metadata to set up profiles can also be updated manually in the PROXESS settings of a scan profile ([PROXESS settings](#)).

Automatic profile matching during login:

Scan Link profiles can be set up on the server via the PROXESS Management Console and distributed to various user groups. By default, the scan profiles on the server are accessed and matched with the status of the workstation at login. This can delay the login process. For that reason, the automatic profile matching can be deactivated here and activated only temporarily, for example, after the configuration tasks have been performed.

Tip




Until the new metadata are completely updated, the previous data set is worked with. Depending on the network connection (branch operation), this may take some time. Only when a new job is accessed will updated metadata be offered.



Digression: Profile management with SQL database

By default, Scan Client profiles are stored in a local access database that only allows one simultaneous access at most. In addition to the profile distribution through the PROXESS Management Console, the PROXESS Scan Client offers the option of saving the profile management in a central SQL database. This enables simultaneous access to one Scan Client profile by multiple users. Possible users are Windows PCs or terminals (terminal server capability).

Warning information

| | |
|---|---|
|  | <p>The setup of an SQL database as a profile database should be handled by the administrator.</p> <p>It must be possible for all affected scan stations to connect to a shared MS-SQL server.</p> |
|---|---|

Step by step:

1. Start the login dialog and click the  or  button.
2. Enter the administrator password for the PROXESS Scan Client.
3. The following dialog opens:

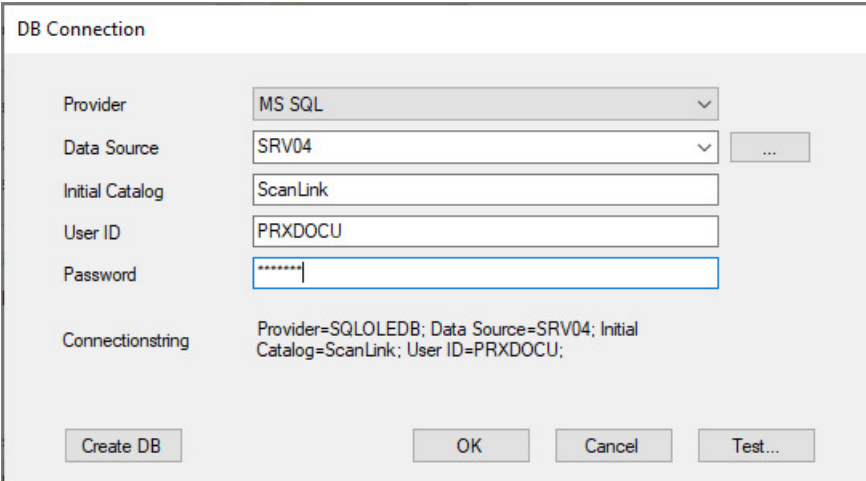


Fig.: Configuration dialog for establishing a database connection to the Scan Client profile management

| | |
|--------------------|--|
| Data source | <p>Select between Access database and MS SQL database.</p> <p>Access database: This is the default setting. When the PROXESS Scan Client program is installed, an access database is automatically installed on the local PC and provided as the database to store the Scan Client profile data. Therefore, no other entries in the dialog box are required.</p> <p>MS-SQL database: The dialog fields have to be completed to establish a connection to the SQL database where the Scan Client profile data are stored every time the program is started.</p> |
| Server name | <p>A list of all SQL servers published in the network is displayed. You can also enter the SQL server name.</p> |

| Documentation PROXESS Scan Client | |
|-----------------------------------|--|
| Initial Catalog | Select the name for the SQL database with which the Scan Link profiles are managed (e.g. ScanLink). The first time you do this, you can establish a new database with this dialog. Later you can connect to the existing database at any time. |
| User name | User name for login to the MS/SQL server (provided with administrative rights) |
| Password | Password for login to the MS/SQL server |
| Database names | Select an arbitrary database name for the database in the MS/SQL server (e.g. ScanLink). The profile data of the PROXESS Scan Link will be stored in this database. |
| Create DB | This lets you create the database in the MS-SQL server. The required tables and fields are created automatically. |
| Test | Here you can test whether a connection to the database can be established with the entered login information. |
| OK | Confirm your connection data with OK . |
| Cancel | Cancel lets you exit the dialog without saving your entries or changes. |

4. Confirm your input with **OK**.

You will get the following message:

For the changes to the database connection to become active, PROXESS Scan Client will automatically close and has to be restarted.

5. Restart PROXESS Scan Client. Now existing Scan Client profiles are loaded onto your work station.

Also see:

[Locally distribute scan profiles](#)

[Distribute scan profiles via XML](#)

[Distribute scan profiles via PROXESS Management Console](#)

Create new profile

Nearly all settings for processing scan jobs are defined in a profile. A job is considered a certain amount of documents (e.g. a stack of scanned documents) that should be processed and archived with identical settings.

The settings are related to:

- The assignment to the PROXESS archive
- The transfer mode (e.g. online/offline)
- The document split and barcode settings
- The properties for individual index fields (properties fields)
- The further processing with PROXESS Xtract

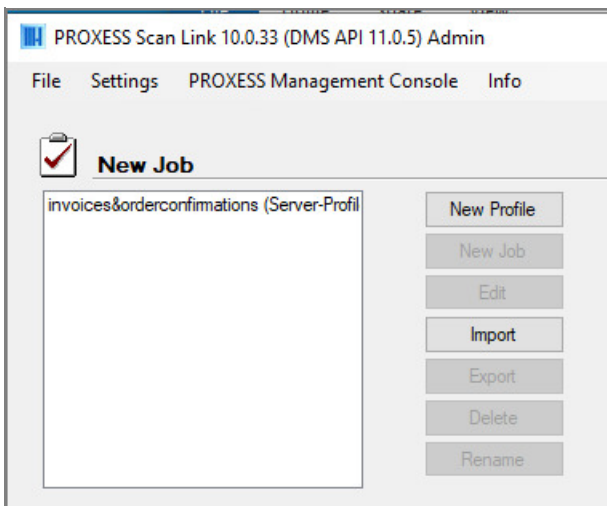
Tip



Profiles are user-dependent. A created profile is initially only visible to the user who created it (e.g. for the admin or the scan user 1, scan user 2, etc.). It is therefore possible that each logged-in user can see different profiles in the Scan Link start window.

When the setting **The profile is visible to all users** is activated in the “[Advanced properties](#)” tab, a profile can also be made available to all users at this local scan station. To transfer a profile to another scan station, the existing profile is exported (XML file) and can then be imported there as an XML file (see exporting or importing profile.) Additionally, there is the option to transfer scan profiles to the server and distribute them centrally in the PROXESS Management Console.

If you now want to create a new scan profile, select the **New profile** button in the start window of the PROXESS Scan Link:



The following dialog box opens:

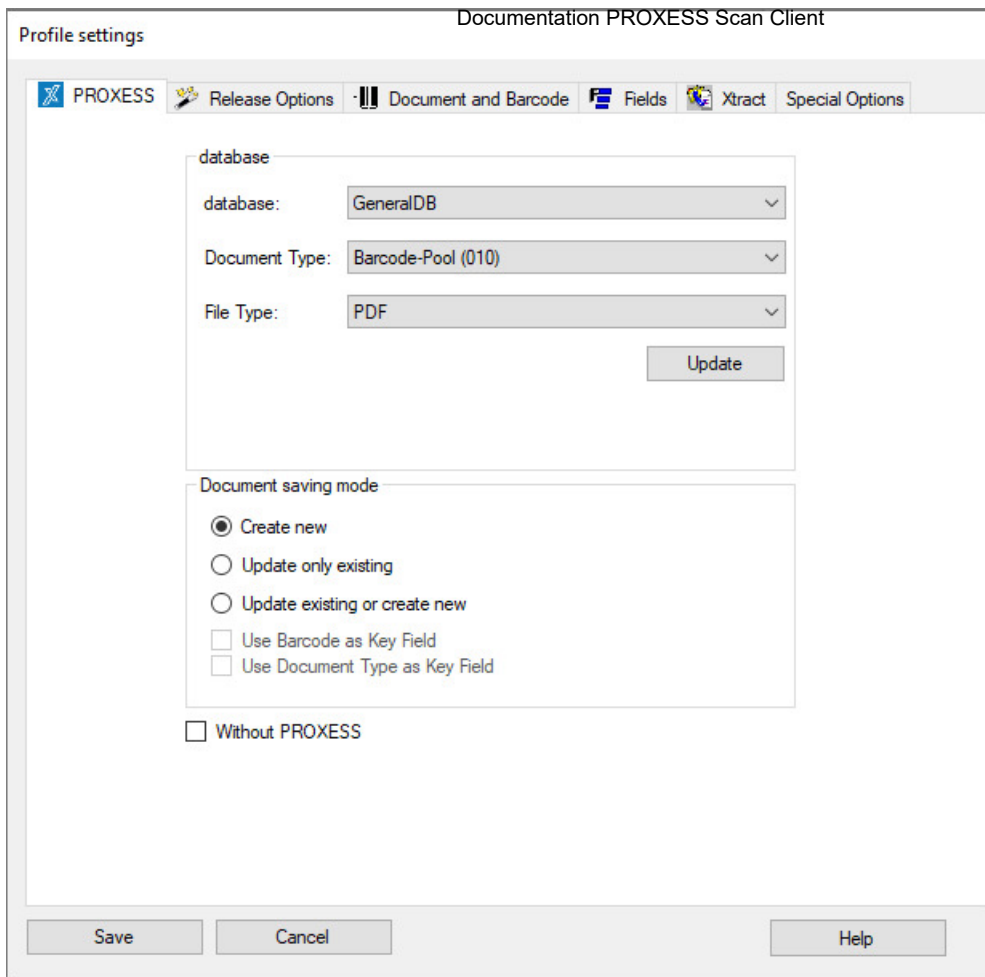


Figure: Profile settings ("PROXESS" tab)

You will now see five tabs with which you can configure the new scan profile.

These tabs are:

- [PROXESS](#) settings
- [Transfer](#)
- [Document and barcode](#)
- [Fields](#) (and field properties)
- [Xtract](#)
- [Advanced properties](#)

The meanings of the individual settings are explained in the corresponding sections.

The **Save** command only becomes active when all necessary settings have been applied. With **Save**, the settings for all tabs are saved.

As a last step, assign a name to the new scan profile.

“PROXESS” tab (profile settings)

In the “PROXESS” tab you define the assignment in the PROXESS archive as well as the mode for document creation in PROXESS.



If you only use the PROXESS Scan Client to scan the documents for downstream processing with PROXESS Xtract, activate the option **Without PROXESS**. This eliminates the archive settings for indexing as well as the settings in the “Transfer” and “Fields” tabs.

The screenshot shows the 'Profile settings' dialog box with the 'PROXESS' tab selected. The settings are as follows:

- database:** GeneralDB
- Document Type:** Barcode-Pool (010)
- File Type:** PDF
- Document saving mode:**
 - Create new
 - Update only existing
 - Update existing or create new
 - Use Barcode as Key Field
 - Use Document Type as Key Field
- Without PROXESS

Buttons at the bottom: Save, Cancel, Help.

Figure: “PROXESS” tab in the profile settings

You have the following setting options:

Indexing

| | |
|--|---|
| <ul style="list-style-type: none"> - Database - Document type - File type | <p style="text-align: center;">Documentation PROXESS Scan Client</p> <p>Here you determine in which archive (PROXESS database) the PROXESS Scan Client documents are archived in PROXESS, with which document type and with which file type. If a PROXESS archive (PROXESS database) is selected, the corresponding document and file types are displayed. Please note that only the databases and document types to which you have access rights are displayed here.</p> <p>You can choose between PDF and TIFF file types in the File type field. This lets you determine the file type for archiving in PROXESS. Even if a PDF file type is selected, you continue to work exclusively with scan files (TIFF) in the PROXESS Scan Client. The TIFF file is only converted into a PDF file at the moment it is archived and transferred to PROXESS.</p> |
| <p>Update</p> | <p>With the Update command, the current PROXESS database settings are accessed and displayed again. You need this command if a PROXESS administrator is editing or creating file or document types at the same time. With the “PROXESS updates” option in the login dialog, the timing of this update can be controlled and automated for the scan editing.</p> |
| <p>Archiving mode</p> | |
| <p>Create new</p> | <p>If this option is activated, a new PROXESS document is <u>always</u> created with each transferred document.</p> |
| <p>Update/reset</p> | <p>If the “same” document already exists in the PROXESS archive, it is updated during the transfer. To this end, a corresponding key field must be defined at the field level (see Key field) whose contents are compared.</p> <p>If there is no “same” document in the archive, the transferred document is placed back, i.e. it remains in the open job and is transferred again at a later time.</p> |
| <p>Update/create new</p> | <p>If the “same” document already exists in the PROXESS archive, it is updated. For the comparison, one or more corresponding key fields must be defined at the field level (see Field properties).</p> <p>If no document with the same name exists in the archive yet, a new PROXESS document is created.</p> |
| <p>Barcode as key field</p> | <p>Activate this option if the barcode field should be a key field to query the update. This automatically also makes it a mandatory field for successful archiving. You can find all further settings for the barcode in the “Document and barcode” tab. Additionally, other key fields can be defined (see Field properties).</p> |

| Documentation PROXESS Scan Client | |
|-----------------------------------|---|
| Document type as key field | Here you define the document type as a key field for the query for the update. Key fields are fields whose contents are used for a query in already archived documents. If corresponding documents are found in PROXESS, the desired action is completed (e.g. update of the found document). The "Document type" field is also always a mandatory field in PROXESS. Additional key fields can be defined with the Field properties command in the "Fields" tab. |
| Without PROXESS | Select this option if documents should be scanned without a connection to the PROXESS archive system, e.g. if the PROXESS Scan Link is used for the downstream document recognition PROXESS Xtract. In the further process, this eliminates the settings for indexing in this tab as well as the settings in the "Transfer" and "Fields" tabs. The settings in the "Xtract" tab must be filled in first. You can also apply the option "Without PROXESS DMS" during the login . |
| Save | With Save , the applied settings are adopted in the current profile. If the button is inactive, the settings are still incomplete. (For example, no settings have been applied in the "Xtract" tab yet. If you want to work without PROXESS Xtract, activate the option Without Xtract here). |
| Cancel | Use Cancel to close the window without saving your entries/changes. |
| Help | With Help , you can open the online help. |

Also see:

[Transfer](#)

[Document and barcode](#)

[Fields](#)

[Xtract](#)

[Advanced properties](#)

“Transfer” tab (profile settings)

Here the settings for the type of transfer of scanned documents to the PROXESS archive are applied. The scanned documents can be transferred offline, online or directly.

Profile settings (invoices&orderconfirmations (PRXDOCU))

PROXESS Release Options Document and Barcode Fields Xtract Special Options

Offline

Sid Format

2X-Format 3X-Spezial-Format ScanLink Format

@IMPHDR,^Proxess^,1001,1004,1005,1006,2001
^4354244^,^Auftrag^,^10.11.03^,^00087632^,^C:\TIF\1.TIF^

Output Path: ...

Online

Online Release options

Direct Scheduled


Save directly to archive

Save Cancel Help

Figure: PROXESS Scan Client profile settings, “Transfer” tab

The following transfer settings are available for you:

| | |
|----------------|---|
| Offline | <p>Offline transfer involves creating a transfer file. This is stored in the entered output path together with the scanned files. The Offline option cannot be stored without specifying an output path.</p> <p>It is possible to use Windows variables when entering the path for the output path.</p> <p>Offline transfer is expedient e.g. when the scanning PC is at a branch and not continuously connected to the PROXESS server.</p> |
|----------------|---|

| Documentation PROXESS Scan Client | |
|-----------------------------------|---|
| Online | With an online transfer, you can choose between Direct transfer and a time-controlled transfer (Scheduled transfer at:) |
| Direct transfer | The direct transfer is initiated with the Archive command in the "Transfer" processing step. Then the documents are archived/transferred. |
| Scheduled transfer at | The time-controlled, scheduled transfer is initiated with the Release command in the "Transfer" processing step. These released jobs also have to be released for archiving again in the menu window Released jobs. Also see: Released jobs |
| Save directly to archive | <p>When this option is activated, the documents are immediately archived without manual release in the "Transfer" processing step. This is only possible (without indexing) if the option Bind by barcode is activated in the Document and barcode tab and a barcode is applied on the first page of the scanned document.</p> <hr/> <div style="border: 1px solid black; padding: 5px; display: flex; align-items: center;">  <p>If the transfer option Direct archiving is selected, you can no longer check and correct the document creation (binding) or further indexing after the scanning and before the archiving.</p> </div> <hr/> |
| Save | With Save, the applied settings are adopted in the current profile. If the button is inactive, the settings are still incomplete. (For example, no settings have been applied in the "Xtract" tab yet. If you want to work without PROXESS Xtract, just activate the option Without Xtract here). |
| Cancel | Use Cancel to close the window without saving your entries/changes. |
| Help | With Help, you can open the online help. |

Also see:

- [PROXESS settings](#)
- [Document and barcode](#)
- [Fields](#)
- [Xtract](#)
- [Advanced properties](#)

“Document and barcode” tab (profile settings)

Information about the barcode recognition and binding, i.e. the combination of individual pages for content-related documents is entered here.

Profile settings (invoices&orderconfirmations (PRXDOCU))

PROXESS Release Options Document and Barcode Fields Xtract Special Options

Set Documents End Recognition through

Barcode Grouping

Barcode string

Grouping 1 2 3 4 5 6 7 8 9 10 11 12

Sorting

Barcode

Group following page with same BC together

No Release when first page doesn't have barcode

Don't save the first page (when more than page exist)

Pages (Multipage)

Fix number of Pages 1

Find Barcode in:

First Page All Pages

Last Page None

Batch

Rollkarten

More Option

Max. number of pages in job 30

manually Barcodeinput w/o checksum

Barcode Types

1D-Barcodes

Code 39 Code 128

Code 39 Ext. Interleaved 2/5

EAN 8 Industrie 2/5

EAN 13 IATA 2/5

2D-Barcodes

Datamatrix

QR Code Configuration...

Barcode options

Barcode's Field

Barcode

Field length: 20

Save with Checksum

Verifying checksum (default)

Verifying checksum (PROXESS)

Long of BC

8

Filter

Save Cancel Help



Figure: PROXESS Scan Client profile settings, “Document and barcode” tab


Example:

Only the Interleaved 2/5 type of barcode should be recognized within a scan batch (other barcode types are then ignored by the system). The recognized barcode value should be transferred to the “barcode” index field without check digits. Additionally, the barcode marks the first page of a document/receipt. For that reason, pages without barcodes are automatically combined into one document with the first barcode page.


Settings for document bindings:

| | |
|-------------------------|--|
| Document binding | The document binding combines individual scanned pages into one document with one or more pages. |
|-------------------------|--|

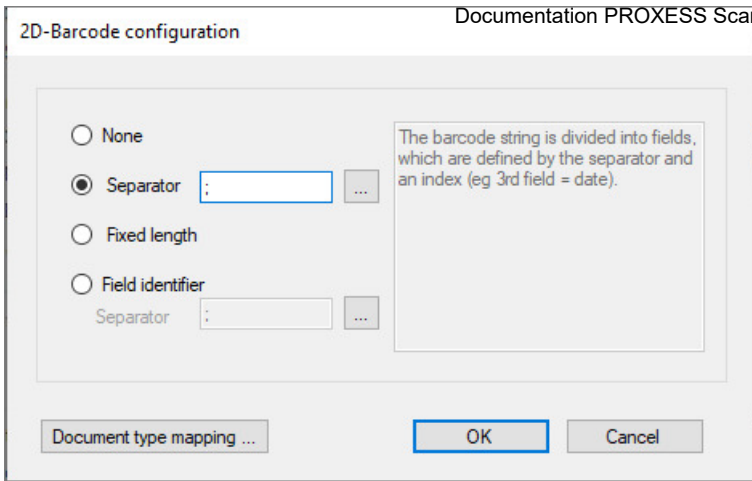
| Documentation PROXESS Scan Client | |
|---|--|
| <p>Group and bind by barcode</p> <p>Group</p>  <p>Sorting</p> | <p>Pages that have a barcode can be combined into one document based on barcode number ranges.</p> <p>You can specify the grouping by highlighting the number position within the barcode number.</p> <p>Pages with barcodes whose highlighted areas have the same numbers are saved as one document under the same group number.</p> <p>Example: The first five digits of the barcode are highlighted under “group” on the side. This way all scanned pages are combined into one document if they have a barcode with the same first five digits (e.g. the barcode numbers 47115 001, 47115 002 and 47115 003). The scanned pages are combined into a document with three pages under the group number “47115”. The identical digits can refer to a case or purchase agreement number. This makes it possible to automatically bind a three-page purchase agreement into one document during scanning.</p> <p>If the pages are unsorted, additional areas in the barcode can be defined according to which the pages are sorted within the document.</p> <p>Example: The digits “6”, “7” and “8” are highlighted. These digits in the barcode could indicate the page numbers. If pages are scanned in the unsorted sequence 47115 002, 47115 003, 47115 001, the PROXESS Scan Client automatically sorts the pages in the right order and combines the document accordingly.</p> |
| <p>Bind by barcode</p> | <p>If this option is activated, each barcode determines the start of a new document. Pages without barcodes are evaluated as succeeding pages and combined into a multipage document.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;">  <p>This setting is the required condition for the Direct archiving option in the Transfer profile setting. Of course you can also use this option if you are archiving online or offline.</p> </div> <p>“Bind following pages with same barcode together” Select this option if the same barcode number is shown on each page of the document. This could be the document number, for example. Then the following pages with the same barcode are combined into a multipage scanned document.</p> <p>“No release when first page doesn't have barcode” This checking routine goes into effect after scanning as part of approving a job. If the first page of the bound document doesn't have a barcode, you will receive a corresponding notice and the document won't be archived. This option only goes into effect with the Online or Offline setting in the Transfer tab.</p> <p>“Don't archive the first page” Select this option if cover sheets with a barcode are used within a scan batch to split documents.</p> |
| <p>Pages (multipage)</p> | <p>With this option, multipage scanned files (multipage TIFFs) are transferred from a folder in Windows Explorer and combined into a joint document.</p> |


| Documentation PROXESS Scan Client | |
|-----------------------------------|---|
| Fixed number of pages | <p>Select this option if all documents in the scan batch have the same number of pages, e.g. if the documents are all one-sided. A possible scenario here is that the documents are pre-ordered according to the page amount before scanning.</p> <p>You can also determine whether a barcode on the documents should be recognized or not. The barcode can be searched for on the first page, the last page or on all pages. Select the None option if you're scanning without a barcode.</p> <hr/> <div style="border: 1px solid black; padding: 5px; display: flex; align-items: center;">  <p>If all pages have to be searched for a barcode, the process takes longer.</p> </div> <hr/> |
| Batch | <p>This option is for documents without barcodes. In this case, all documents of an inserted scan batch are bound into one document.</p> |
| Roll cards | <p>This option allows for multiple barcodes on one page. During further processing, the page splitting and document binding is carried out according to the marked separators and barcodes on one page. (Example: archiving of smaller delivery slips.)</p> |

Barcode selection:

| | |
|-------------------|---|
| 1D barcode | <p>Here you select the barcode types to be recognized and evaluated by the program. You can also select multiple barcode types here. Only the barcode types "code 39" and "code 39 ext." are mutually exclusive for technical reasons.</p> <hr/> <div style="border: 1px solid black; padding: 5px; display: flex; align-items: center;">  <p>The more barcode types are selected, the longer the barcode recognition takes. For that reason, only the barcode types that are actually needed should be selected.</p> </div> <hr/> |
| 2D barcode | <p>Choose between "Data matrix" and "QR code"</p> |

2D barcode configuration:



| | |
|---|---|
| None | The read barcode string is only written into the target field for the barcode. |
| Separator | <p>The read barcode string is written into the target field for the barcode.</p> <p>Additionally, the content of the barcode string is divided into further index fields. Enter the separator used in the barcode string here.</p> <p>You have to assign the values in the barcode string to PROXESS fields under the Fields/field properties tab.</p> |
| Fixed length | <p>The read barcode string is written into the target field for the barcode.</p> <p>Additionally, the content of the barcode string is divided into further index fields. The division is performed according to fixed positions within the string (for example: date starts at position 10 and ends at position 17).</p> <p>You have to assign these fixed positions in the barcode string to PROXESS fields under the Fields/field properties tab.</p> |
| Field identifier (with separators) | <p>The read barcode string is written into the target field for the barcode.</p> <p>Additionally, the content of the barcode string is divided into further index fields. The division is performed according to a field identifier preceding the actual index value (e.g. DOCTYPE: outgoing invoice.)</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;">  <p>When you assign the keys (prefixes), keep in mind that the barcode string can have a maximum length of 255 characters.</p> </div> <p>Here too a separator is applied between the index value and the following field identifier in the barcode string.</p> |
| Document type mapping | Here you can assign the names of document types from the barcode string to PROXESS document types (see figure below.) |

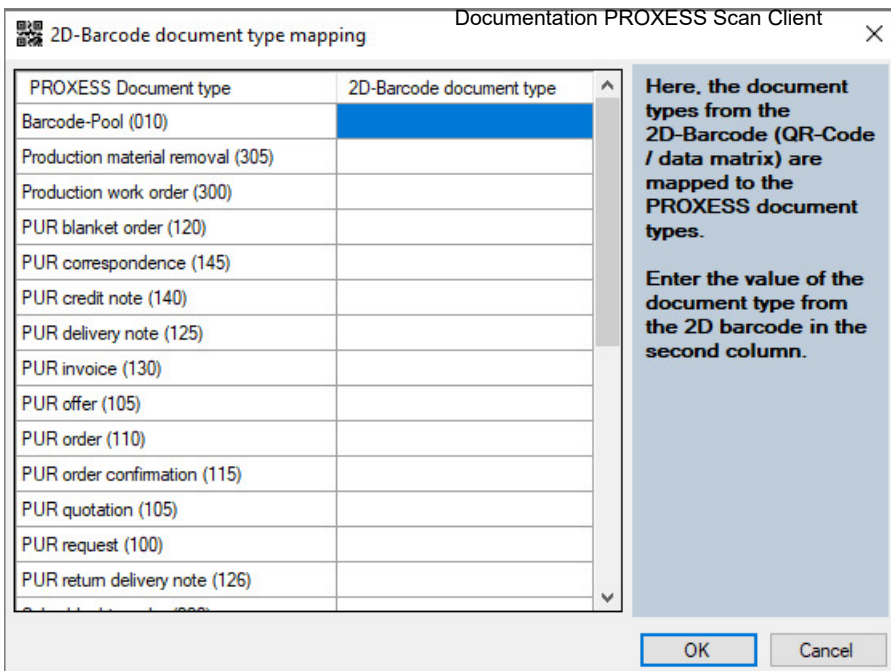
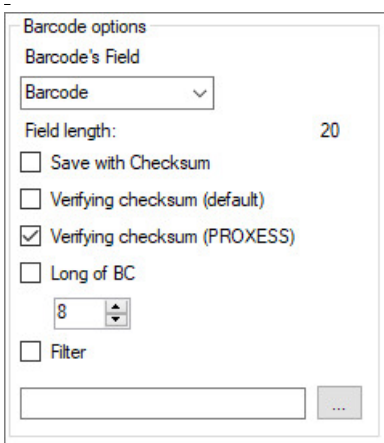


Fig.: Dialog on document type mapping for 2D barcodes

Barcode options:



Barcode field

Here the barcode is assigned a target field in the archive. The fields displayed in the selection list depend on the selected archive database in the [PROXESS settings](#) tab.

There are additional options for 1D barcodes, including archiving **with** or **without check digit**, **checking the check digit** or the **length of the barcode**.

Save with check digit

only for 1D barcodes:

If this option is active, the barcode number is entered into the barcode field selected above with the check digit (e.g. the last two digits). Since the check digit has no further function after the barcode recognition, the check digit is usually not transferred and this option is not activated.

Verifying check digit (default)**only for 1D barcodes:**

Here the single-digit standard check digit routine (7+1) is activated. In this case, the last digit in an 8-digit barcode is the check digit.

If you are using a barcode type with a check digit, it is recommended to activate this option.

Verifying check digit (PROXESS)**only for 1D barcodes:**

This activates the two-digit PROXESS check digit routine (8+2). In this case, the last two digits in a 10-digit barcode are the check digits.


If you are using a barcode type with a check digit, it is recommended to activate this option.

Specify length (only for 1D barcodes)

Certain barcode types (e.g. interleaved) can have various lengths. This additional filter option makes it possible to filter out the barcodes that shouldn't be recognized (foreign barcodes).

Filter (only for 1D barcodes)

When you activate this option, you can set a selection filter for the barcode recognition. This way the system only enters barcodes as recognized when they match the filter criterion. With this option you can e.g. exclude foreign barcodes or assign a separate barcode range to the current profile.

With the  button, you access the barcode validator (see fig. below). It also offers the option of performing a manual test of the entered filter expression.

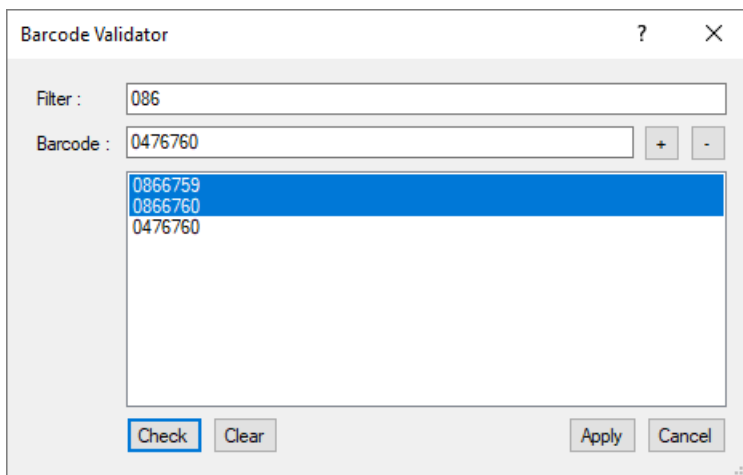


Fig.: Barcode validator

You can generally use the "Regular expressions" of the Microsoft Visual Studio as barcode filters. You can get an overview of all available "Regular expressions" via the question mark on the top right edge of the screen. You will need internet access to call up the online help from Microsoft.

Examples of filter expressions:

Filter expression: `^086`

Selects all barcodes that start with the number combination "86" (e.g. 86123432, 86444442, 86743005).

Filter expression: `086`

Selects all barcodes that contain the number combination "086" (e.g. 12348652, 56238609, 86743567).

Filter expression: `^[1-5]`

Selects all barcodes whose first digit is between 1 and 5 (e.g. 12345678, 32575663, 45789717).

Other settings:

More options:

Set maximum number of pages

This limits the scan batch and the transfer job to a certain maximum number of pages. As a result, very large scan jobs are avoided, which are very complex and thus difficult to handle during further processing. The size of the transfer jobs to PROXESS Xtract can also be limited. It is not possible to divide a job retroactively.

Manual barcode input without check digit

By default, the check digit function is also performed when the barcode is entered manually, as long as the option "Review check digit" is activated for barcode recognition (see above).

This means that the user enters the barcode manually with a check digit. It is then reviewed and truncated by the system and entered into the "Barcode" field without a check digit.

If the setting "Manually barcode input without check digit" is activated, no check digit is verified during the manual entry of the barcode. All manually entered numbers are acquired as barcode numbers.

In other words, in this case the check digit of a barcode may not be entered.

Save

With **Save**, the applied settings are adopted in the current profile. If the button is inactive, the settings are still incomplete. (For example, no settings have been applied in the "Xtract" tab yet. If you want to work without PROXESS Xtract, just activate the option **Without Xtract** here.)

Cancel

Use **Cancel** to close the window without saving your entries/changes.

Help

With **Help**, you can open the online help.

Also see:

[PROXESS settings](#)

[Transfer](#)

[Fields](#)

[Xtract](#)

[Advanced properties](#)

“Fields” tab (profile settings)

In this area you can determine which fields are used to index the documents.

Then you can use the **Field properties** command to determine additional properties of individual fields for the selected scan profile.

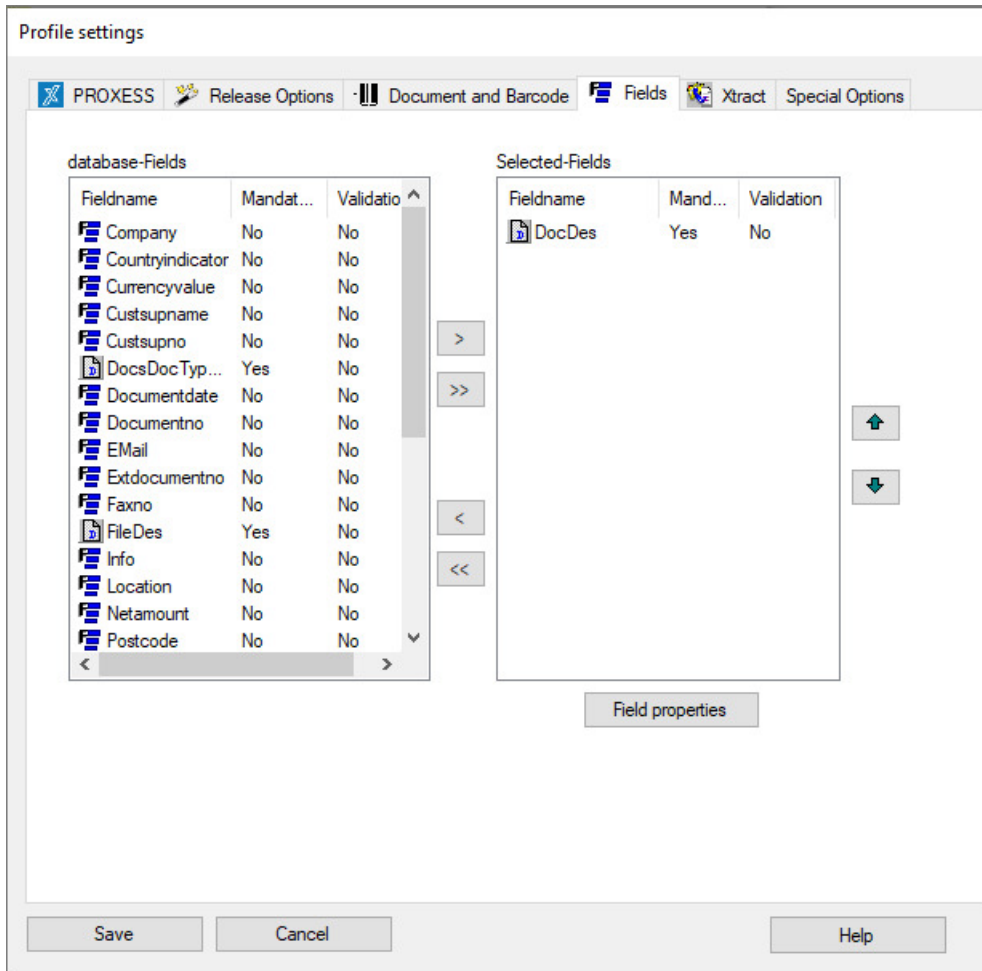


Figure: PROXESS Scan Client profile settings, “Fields” tab for the scan profile “WF_CostAccounting”

All fields of the database selected in the PROXESS tab are listed in the left area of the window under *Database fields*. You can transfer the fields for indexing required for this profile to the right window and thus make it available to the scan profile. If no fields are adopted for the profile, only the PROXESS core fields (document name, document type) for subsequent indexing are shown.










Explanations regarding the PROXESS core fields:

The document name (field name = DocDes) **must** always be filled and configured as a mandatory field. For that reason, it is already displayed to the right in the list of selected fields.

The document type (field name = DocsDocTypeName) does not have to be selected. If the document type is not selected, the document type selected under the PROXESS tab is entered by default. If the document type is selected for indexing, another document type that deviates from this can be selected during the indexing process. This makes sense if the document type may change within a scan batch.

The file name (field name = FileDes) also does not have to be selected. In this case, the recognized barcode number is entered as the file name by default. If no barcode number is recognized, the file name is used as the description by default. However, the “file name” field can also be selected for indexing (i.e. dragged into the right column) and filled with an arbitrary value that deviates from this.

The individual field settings can be defined via the **Field properties** command and refer to the selected field. The button

| | |
|---|--|
| Database fields | In the left window, all index fields of the database are listed that you previously selected in the "PROXESS" tab. |
| Selected fields and PROXESS mandatory fields | This shows all index fields that you have selected for this profile. |
| Field name | Name of the index field in the PROXESS archive database |
| Mandatory | <p>Indicates whether the field in PROXESS is a mandatory field or not.</p> <hr/> <div style="border: 1px solid black; padding: 5px;">  <p>PROXESS mandatory fields must definitely be selected for the scan profile, otherwise there will be error messages during the saving process in PROXESS. The definition of an index field as a mandatory field is performed in the PROXESS Administrator Console program.</p> </div> <hr/> |
| Validation | The Validation column shows whether a PROXESS validation rule is allocated to this index field. If the field entry doesn't fulfill the specified rule, the entry is invalid. The validation rule is stored in the PROXESS Administrator Console program. |
|  | Indicator for a core field in PROXESS |
|  | Indicator for a normal field. If the field is simultaneously a mandatory field in PROXESS, the symbol is red. |
|  | With this button, you can select highlighted fields in this profile. |
|  | Selected fields can be removed from the profile again with this button. |
|  | All fields are removed from the left window and the scan profile again. |
|  | All fields are deselected with this button. |
|  | This moves the highlighted field up in the order of fields that will be displayed later in the indexing mask. |
|  | This moves the highlighted field down in the order of fields. |
| Field properties | With this command, you access another dialog in which the highlighted field acquires further field properties , which then only apply to this field and the active scan profile. |

| Documentation PROXESS Scan Client | |
|-----------------------------------|--|
| Save | With Save , the applied settings are adopted in the current profile. If the button is inactive, the settings are incomplete. For example, no settings have been applied in the "Xtract" tab yet. If you want to work without Xtract, just activate the option Without Xtract . |
| Cancel | Use Cancel to close the window without saving your entries/changes. |
| Help | With Help , you can open the online help. |

Also see:

[Online documentation for PROXESS Administrator](#)

[Field properties](#)

[PROXESS settings](#)

[Transfer](#)

[Document and barcode](#)

[Xtract](#)

[Advanced properties](#)

Field properties (profile settings)

Here you have extensive setting options for individual fields that you selected for the scan profile. All properties that are defined for a particular field here are only valid for the respective **scan.profile**. The same field can have different properties in a new scan profile.

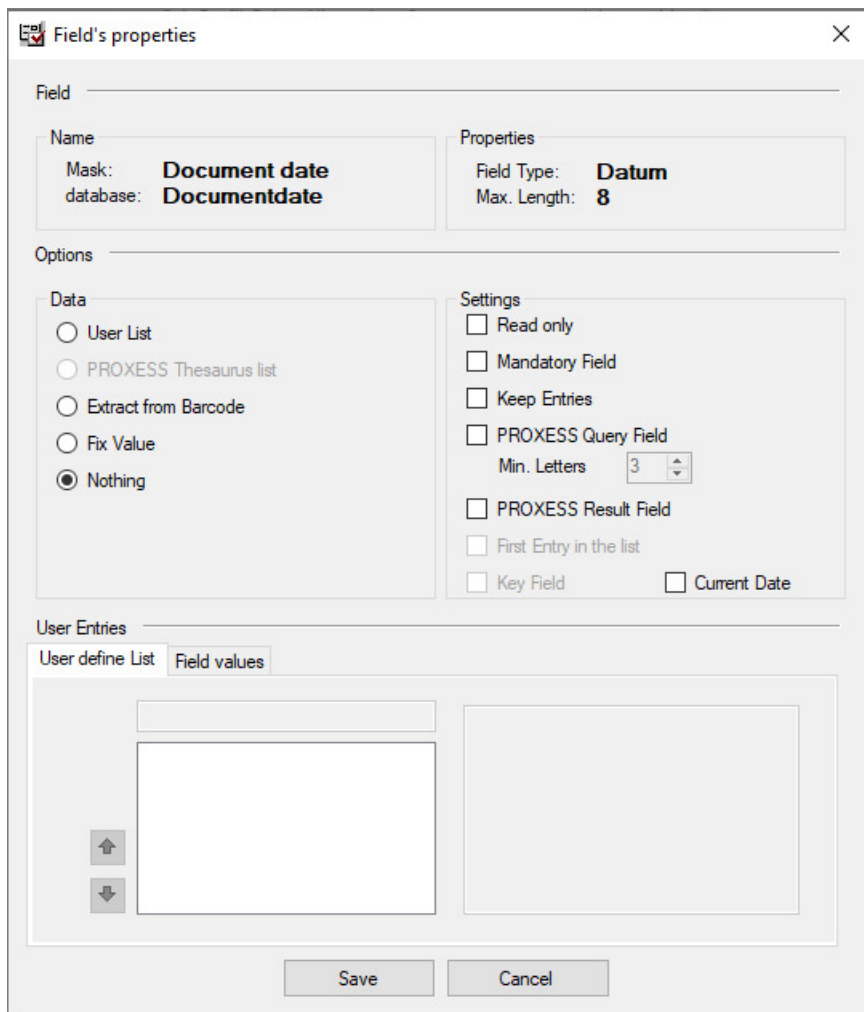







Figure: Profile settings in the “Fields/field properties” tab (here for the field: Document date)

The setting options in detail:

| | |
|---|---|
| <p>Field (name and properties)</p> | <p>The displayed field properties are defined in the PROXESS Administrator Console and can't be edited here.</p> <p>Mask: Field designation in the document mask/index mask Database: Name of the field on the database level Field type: Data type of the field Max. length: Maximum field length</p> |
| <p>Options/field data</p> | |
| <p>User-defined list</p> | <p>A manual selection list with entries of available options during the scan and indexing process is assigned to this field. The entries can be filled in below.</p> |

| | |
|---|--|
| <p>PROXESS thesaurus list</p> | <p style="text-align: center;">Documentation PROXESS Scan Client</p> <p>If the field has already been filled with a thesaurus (selection list) via the PROXESS Administrator Console, this is also available in the PROXESS Scan Client. Edits to the thesaurus are also made via the PROXESS Administrator Console and are then available for general use.</p> |
| <p>Extract from barcode</p> | <p>If this option is active, the field is filled with the recognized barcode value. There is the option to acquire the complete barcode or individual sections of the barcode for this field. If only sections should be shown, this is configured in the Barcode mask area.</p> |
| <p>Fixed value</p> | <p>With this selection, you can defined fixed values with which the field is filled automatically. In addition to manually entered values, you can select from four rules that can also be combined: see Enter fixed value on this topic.</p> |
| <p>None</p> | <p>This is the default setting. No field content is predefined. The field can be filled manually during the archiving.</p> |
| <p>Options/settings</p> | |
| <p>Read only</p> | <p>The “Read only” setting means that the user is unable to change the content of this field. This makes sense when the system automatically fills fields, e.g. via the barcode recognition or the PROXESS Index Miner.</p> |
| <p>Mandatory field</p> | <p>If a field is marked as a mandatory field, it must be filled. Otherwise no storage or archiving is possible.</p> |
| <p>Keep entries</p> | <p>The user’s last entry in this field is used as a template during the automatic switch to the next document.</p> |
| <p>PROXESS query field Min. characters</p> | <p>Here the current field can be defined as a query field. When indexing the scanned documents, entries in these fields trigger automatic retrieval in the archive and the corresponding hitlist is shown. Now the user can automatically adopt the shown index values in fields defined as result fields. To use this function, result fields must be defined in advance (PROXESS query field). The minimum amount of characters to start the search prevents the hitlist from becoming too large (also see Indexing with the PROXESS Index Miner.)</p> |
| <p>PROXESS result field</p> | <p>A field marked as a PROXESS result field is filled with the values of fields with the same name in the selected document from the above hitlist (also see Indexing with the PROXESS Index Miner.)</p> |
| <p>First entry in the selection list</p> | <p>When user-defined lists or thesaurus lists are used, the default entry for the selection list can be defined here.</p> |

| | |
|--|--|
| <p>Key field</p> | <p style="text-align: center;">Documentation PROXESS Scan Client</p> <p>This field is only active if the option Update/reset or Update/create new was selected in the tab for the archiving mode (see "PROXESS" tab.)</p> <p>If an already archived document should be updated with new data (new index values or new scanned files), at least one unique field must be defined as a key field. An update is only performed when the key field(s) is/are identical.</p> |
| <p>Current date</p> | <p>This option is only shown for fields of the "Date" data type. If the field is a date field, you can define that the current date is entered automatically.</p> |
| <p>User entries</p> | |
| <p>Tab: User-defined list</p> | <p>Similarly to thesaurus lists, user-defined lists with entries can be created here. These are then available interactively for indexing.</p> |
| <p>Entering fixed values</p> <div style="display: flex; flex-direction: column; align-items: flex-start;">      </div> | <p>Fixed values can be defined here, which are entered automatically by the system:</p> <p>The current date is inserted. You can choose between the day-month-year and year-month-day formatting.</p> <p>The logged-in user name is inserted.</p> <p>The document type is inserted.</p> <p>The job number is inserted.</p> <p>The PC name of the scan station is inserted.</p> <p>In addition, Windows system variables can be entered (e.g. %scanlocation%). This requires that each of these system variables were previously defined at the local scan stations.</p> |
| <p>User entry/field values</p> | |
| <p>Barcode mask</p> <div style="border: 1px solid gray; padding: 5px; margin-bottom: 10px;"> <p>Barcode String</p> <p>3 <input type="text"/> -----> <input type="text"/></p> <p>E.g. 1 -----> 4</p> </div> <div style="border: 1px solid gray; padding: 5px;"> <p>Barcode String</p> <p>3 <input type="text"/> -----> <input type="text"/></p> </div> | <p>You can use this mask to adopt sections of a barcode number/a barcode string into index fields. This makes sense especially when they are logical barcodes. The unlocked configuration options depend on the selection in the "Field data" area and on the barcode configuration in the "Document and barcode" tab.</p> <p>On the left, you can see an example of 1D barcodes and 2D barcodes with "Fixed length": --> The 1st to 8th characters of the barcode string are entered in this field.</p> <p>Here you can see an example of 2D barcodes with the configuration "Separators and index assignment": --> The 3rd index is read and entered in the field Example of a 2D barcode string: 1;25.10. 2016;471123;895672;50 --> The third index value is 471123.</p> |

| | |
|---|---|
| <p>2D barcode configuration—selectable key</p> | <p style="text-align: center;">Documentation PROXESS Scan Client</p> <p>Requirements: The program reads 2D barcodes (e.g. QR codes) and, to interpret the barcode string, the option “Selectable key” was chosen in the 2D barcode configuration. You can find these settings in the “Document and barcode” tab.</p> <p>Enter the field designation (usually a prefix <u>including</u> separator) from the barcode string. In the field properties of the PROXESS field “Document no.”, enter the designation “DCNR:”, for example.</p> |
| <p>Save</p> | <p>With Save, the settings for the current field are applied.</p> |
| <p>Cancel</p> | <p>Use Cancel to close the window without saving your entries/changes.</p> |
| <p>Help</p> | <p>With Help, you can open the online help.</p> |

Xtract settings

The PROXESS Scan Client can be used to import documents which are further processed with the automatic document recognition and processing system PROXESS Xtract.

Certain settings must be applied in the **Xtract** tab for the files to be transferred.

Profile settings (invoices&orderconfirmations (PRXDOCU))

PROXESS Release Options Document and Barcode Fields Xtract Special Options

Xtract Settings

Exchange-Path: C:\Extract\Exchange ...

Mandant: PROXESS Invoice

Document Group: Invoice

User Name: admin

DTD-Path: ..\..\System\Config\DTD\sfx_import.dtd ... Default

Job prefix name: Job

Predefined fields that are exported to Xtract:

| Name | Value |
|------|-------|
| | |

Transfer to Xtract: as document Jobseparation

Convert to: PDF


Barcode separation: Separator

Save Cancel Help

Figure: PROXESS Scan Client profile properties. "Xtract" tab

The individual settings for transfer to PROXESS Xtract:

| | |
|-----------------------|--|
| Exchange path | The path of the transfer directory for the scanned files to PROXESS Xtract is entered here. The entry of Windows variables (e.g. %invoicelocation%) is supported for the path entry. |
| Client | The client name used in Xtract is entered here. An Xtract client is a certain editing profile for transferred documents. The standard client name for processing incoming invoices with PROXESS Xtract is "Invoice". |
| Document group | With the document group, the Xtract client can be subdivided further. For the "Invoice" client for incoming invoices, for example, this could be the document group "Costs" and/or "Receiving". |

| | |
|--|---|
| User name | <p>Documentation PROXESS Scan Client</p> <p>A valid Xtract user name must be entered for the import of scanned documents. The default Xtract user is "admin".</p> |
| DTD path | <p>The configuration file for the transfer format of the XML file is located at the entered path.</p> <hr/> <div data-bbox="592 344 1361 456" style="border: 1px solid black; padding: 5px;">  <p>The path must match the path entered in PROXESS Xtract.</p> </div> <hr/> <p>The entry of Windows variables (e.g. %DTPIlocation%) is supported for the path entry.</p> |
| Job prefix name | <p>A corresponding designation can precede the job number (e.g. "II" for incoming invoice.)</p> |
| Predefined fields that are imported to Xtract | <p>Here you can have fixed values entered in the XML transfer file which PROXESS Xtract will use later, e.g. for evaluation purposes.</p> |
| Transfer to Xtract | <p>Here the transfer options for PROXESS Xtract are defined:</p> <p>None: If you don't use PROXESS Xtract, this setting must be activated. Otherwise no storage of the scan profile is possible.</p> <p>As a document: The document binding in PROXESS is maintained in PROXESS Xtract. With this option, all pages of a document run through the automatic document recognition.</p> <p>As a process: Several scanned pages are combined as a PROXESS document and archived as a document during the transfer to the PROXESS archive. However, it is possible to edit the individual pages of a process differently in PROXESS Xtract.</p> <p><u>Example:</u> Incoming invoices are scanned and archived with their attachment (e.g. delivery note, images, etc.). With the transfer option "As a process", only the first page can be edited with automatic text recognition in PROXESS Xtract. The following pages are attached to the document without editing via automatic text recognition.</p> <p>This page splitting is performed manually in PROXESS Xtract. If you want to automate this task, you could use the option Barcode separation combined with Separating barcodes (see below.)</p> |
| Convert to | <p>Here you can choose whether the documents are transferred in TIFF format (default setting) or converted as a PDF file to PROXESS Xtract.</p> |

| | |
|----------------------------------|--|
| <p>Barcode separation</p> | <p>Documentation PROXESS Scan Client</p> <p>Here a separating barcode can be entered to split pages within a document. Pages with a separating barcode and their following pages are <u>not</u> edited with the Xtract document recognition.</p> <p>Example: A 10-page invoice is recognized via the applied barcode with the following pages. The separating barcode defined here is applied on page 6, (e.g. 99999999), since these are attachments for the invoice. This means that pages 6–10 as archived together with pages 1–5 as one document. However, these pages are not edited via the automatic Xtract document recognition.</p> <p>In contrast to the option “transfer as a process”, the pages no longer have to be split manually for automatic document recognition in Xtract, due to the applied separating barcode.</p> |
| <p>Save</p> | <p>With Save, the applied settings are adopted in the current profile. If the button is inactive, the settings are still incomplete.</p> |
| <p>Cancel</p> | <p>Use Cancel to close the window without saving your entries/changes.</p> |
| <p>Help</p> | <p>With Help, you can open the online help.</p> |

Also see:

[PROXESS settings](#)

[Transfer](#)

[Document and barcode](#)

[Fields](#)

[Advanced properties](#)

Advanced properties

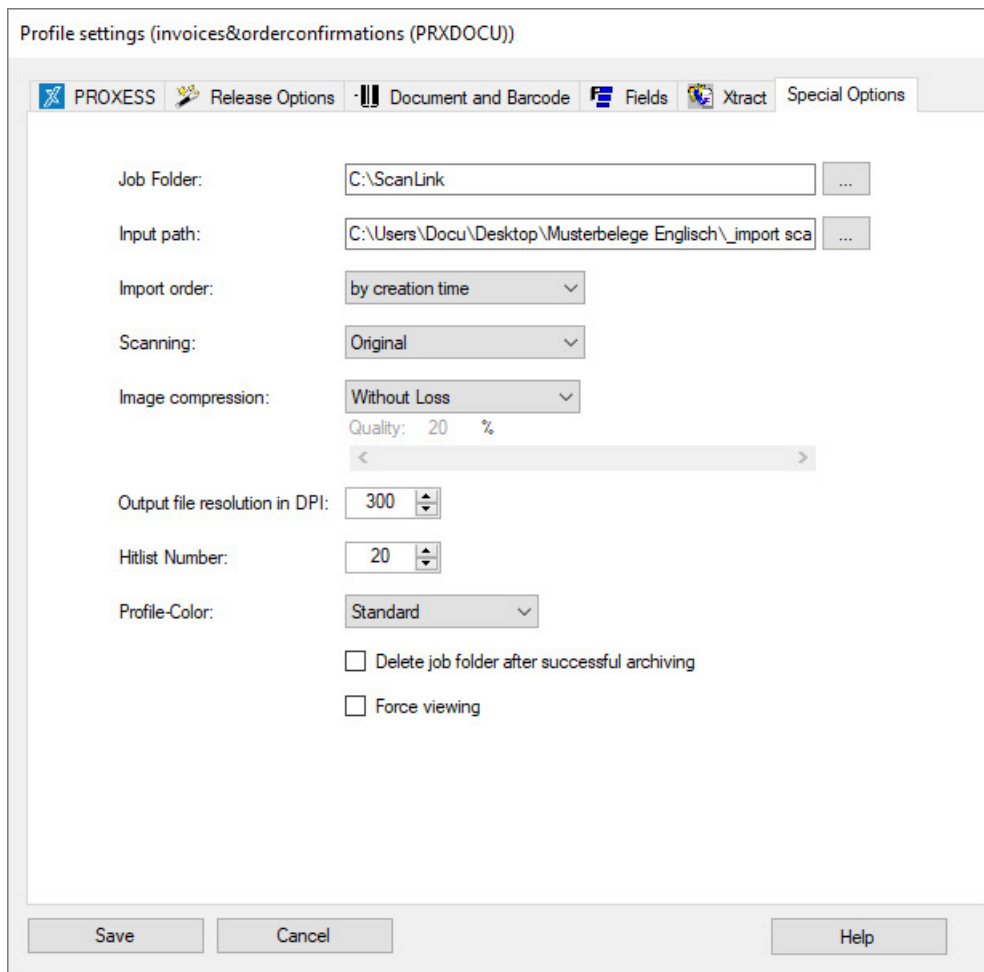






Figure: Scan Client profile settings, “Advanced properties” tab

The following settings are possible in the “Advanced properties” tab:

| | |
|-----------------------------|--|
| <p>Job directory</p> | <p>Scanned files from a scan job are stored at the path specified here before indexing/binding. The default setting is: “C:\ScanLink”. It is possible to use Windows variables (e.g. %Job_directory%) when specifying the path. This makes it easier to roll out server-based scan profiles.</p> <hr/> <div style="border: 1px solid black; padding: 5px;">  <p>Ensure that you select a different folder here to the exchange path for the Xtract transfer, otherwise there may be file conflicts or unintentional data loss.</p> </div> |
|-----------------------------|--|

| Documentation PROXESS Scan Client | |
|---|--|
| Import directory | <p>TIFF files can be imported from the path specified here for further processing. This settings enables a spatial and/or temporal separation of the scan process and the further processing (indexing) of a scan job. The path specified here is automatically shown under the folder column during the “Import” processing step.</p> <p>It is possible to use Windows variables (e.g. %Import_directory%) when specifying the path. This makes it easier to roll out server-based scan profiles.</p> |
| Import order | <p>Here you can determine the sequence according to which the TIFF files are imported from the import directory. The criteria “by creation date” and “by file name” are possible.</p> |
| Scan | <p>Here you can select whether the scan should be in color or in black and white. If “Original” is selected, the current settings of the Twain scanner driver are adopted.</p> |
| Image compression | <p>Here you can choose whether and at which compression level the color scan files should be transferred to PROXESS.</p> <p>Lossless = no compression With loss = with compression, adjustable from 0–100%</p> <p>See compression table</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;">  <p>The compression is only carried out when the documents are transferred to the PROXESS archive. If the “with loss” option is activated, it is mandatory to perform a quality check of the archived files after archiving with the PROXESS Client.</p> </div> |
| The profile is available for all users | <p>If this option is activated, the scan profile is available to <u>all users</u> who locally log in <u>to this workstation</u>.</p> <p>This option is no longer available for PROXESS version 5⁺ R2 or later. Older scan profiles may still have this property. If the option is deactivated (this is e.g. a necessary condition for distributing a profile to other users via the PROXESS Management Console), this can no longer be reversed.</p> <p>To transfer a scan profile to other work stations, the profile can be exported as an XML file or you can choose the central distribution of scan profiles via the PROXESS Management Console.</p> |

| Documentation PROXESS Scan Client | |
|---|--|
| Output file resolution in DPI | <p>This value must correspond to the Twain settings of the scanner. If you scan documents at a resolution of 300 DPI, you have to enter this value here. If the value entered here deviates from the value of the scanner, the later output (print) of the scanned files is distorted and deviates from the original size of the source document.</p> <hr/> <div style="border: 1px solid black; padding: 5px;">  <p>If the scanned files will be further processed with the document recognition and processing of PROXESS Xtract, the scans must have a minimum resolution of 300 DPI.</p> </div> <hr/> |
| Hitlist number | <p>If PROXESS query and PROXESS result fields were defined in the field properties, you can specify the maximum number of displayed hits with this entry. This results in a faster display of the hitlist. Additionally, only the latest results of the hitlist are displayed. Entries can range from 1 to 10,000. The default setting is 20 displayed hits per query.</p> |
| Delete job folder after successful archiving | <p>If this is activated, the job folder is deleted after the successful archiving of the job.</p> <hr/> <div style="border: 1px solid black; padding: 5px;">  <p>If automatic deletion isn't activated, you should occasionally check the job directory and manually delete it if needed.</p> </div> <hr/> |
| Profile color | <p>To visually separate the scan profiles, you can set different background colors for each profile.</p> |
| Force viewing | <p>If this option is activated, the user must view all pages, including scanned pages without a barcode, in the document management area before transferring the scan batch into the archive and confirm each page as the succeeding page. The "Transfer" function will only be unlocked after each page is viewed.</p> |
| Save | <p>With Save, the applied settings are adopted in the current profile. If the button is inactive, the settings are still incomplete.</p> |
| Cancel | <p>Use Cancel to close the window without saving your entries/changes.</p> |
| Help | <p>With Help, you can open the online help.</p> |

Also see:

[PROXESS](#)

[Transfer](#)

[Document and barcode](#)

[Fields](#)

Distribute scan profiles via XML

Nearly all settings for processing scan jobs are defined in a scan profile. A job is considered a certain amount of documents (e.g. a stack of scanned documents) that should be processed and archived with identical settings.

The scan profile settings are related to:

- The assignment to the PROXESS archive
- The transfer mode (e.g. online/offline)
- The document split and barcode settings
- The properties for individual index fields (properties fields)
- The further processing with PROXESS Xtract

Profiles are user-dependent. A created profile is initially only visible to the user who created it (e.g. for the admin or the scan user 1, scan user 2, etc.). It is therefore possible that each logged-in user can see different profiles in the Scan Link start window.

Transfer a scan profile to other workstations via XML file

To transfer a profile to another scan station, the existing profile is exported as an XML file via the **Export** function. Then this XML file can be imported there again with the **Import** function.

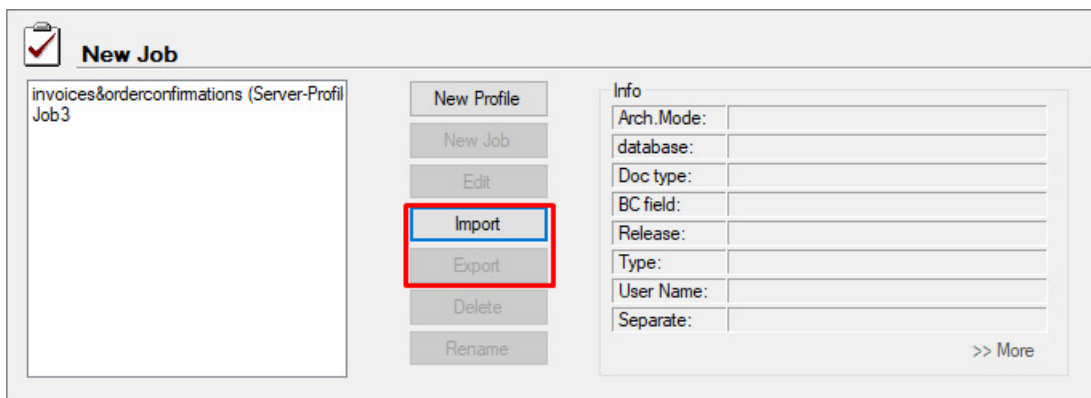


Fig.: Importing or exporting a scan profile via XML files

Who can see and use an imported scan profile?

- A) The option **Profile is available for all users** is activated before the export: After the import, all users of the new workstation can immediately use the imported profile.
- B) The option is **not activated**: Only the user who has exported the profile can access the imported profile at the new workstation.

Additionally, there is the option to transfer scan profiles to the server and distribute them centrally in the PROXESS Management Console.

Also see:

[Distribute scan profiles via PROXESS Management Console](#)

[Digression: Scan profile names](#)

Distribute scan profiles via PROXESS Management Console

Nearly all settings for processing scan jobs are defined in a scan profile. A job is considered a certain amount of documents (e.g. a stack of scanned documents) that should be processed and archived with identical settings.

The scan profile settings are related to:

- The assignment to the PROXESS archive
- The transfer mode (e.g. online/offline)
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- The properties for individual index fields (properties fields)
- The further processing with PROXESS Xtract

Profiles are user-dependent. A created profile is initially only visible to the user who created it (e.g. for the admin or the scan user 1, scan user 2, etc.). It is therefore possible that each logged-in user can see different profiles in the Scan Client start window.

Additionally, there is the option to transfer scan profiles to the server and distribute them centrally in the PROXESS Management Console.

Manage and distribute a scan profile centrally via the PROXESS Management Console

With this option you can download scan profiles from a workstation to the PROXESS server and centrally unlock them for certain users (or user groups). The creation and configuration of a scan profile are always carried out in the PROXESS Scan Client. The central management and distribution of the profiles are performed in the PROXESS Management Console.

The advantage of this variant is that you can manage scan profiles centrally and don't need access to the local workstations.

-
-

Step by step:

1. Log in at an arbitrary workstation as an administrator for the PROXESS Scan Client.
2. Create a scan profile and save it (e.g. general scan stack). Please note the tip!

Tip



For scan profiles that are intended for central distribution via the PROXESS Management Console, do not **activate the setting "This profile is available to all users"**.

Background: Otherwise, users at this workstation might later see the profile double. First with the option "This profile is available to all users (of the workstation)" and, second, with the central distribution via the PROXESS Management Console. This could result in ambiguities.

3. Highlight (select) the scan profile and select the command **Transfer selected profile** in the "PROXESS Management Console" menu.

Now the transferred profile will have an extension in parentheses behind the name.

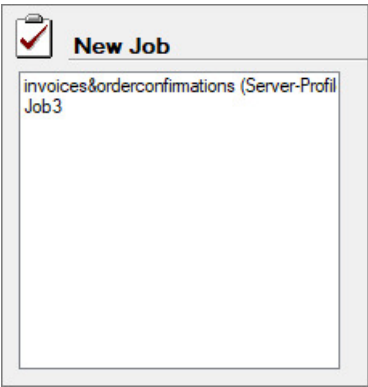


Fig.: Different scan profile names

Also see: [Explanations regarding the scan profile names](#)

4. Start the PROXESS Management Console and connect as an administrator.

Now the profile transferred to the server is available to you in the PROXESS Management Console in the administrator group:

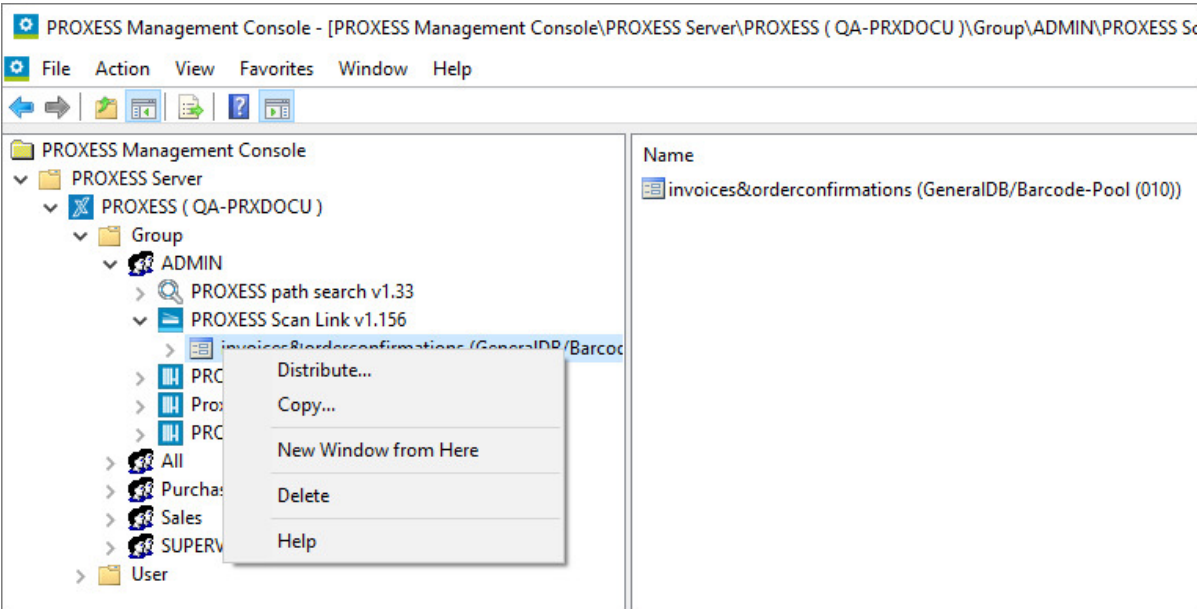


Fig.: Central scan link profile management in the PROXESS Management Console

5. Select the **Distribute** command in the context menu of the scan link profile and highlight the users or groups that should use the profile.

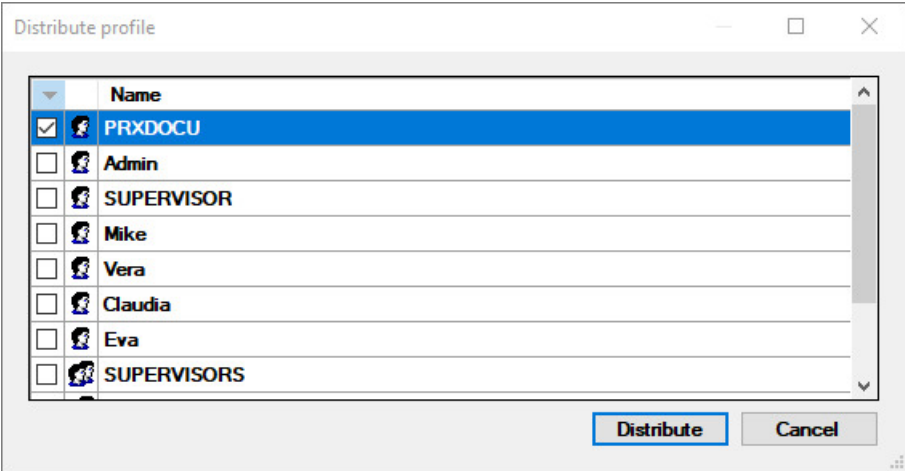


Fig.: "Distribute profile" dialog box

Confirm your selection with the **Distribute** command. You will get a message that the distribution has been performed.

6. Save your settings in the PROXESS Management Console with the command **“Acquire all settings”** via the context menu in the server node.

7. Affected users will automatically import the scan profile during the next start of the PROXESS Scan Client. Now the profile is available to the user at every workstation (scan station).

Use the menu “PROXESS Management Console” to define whether an info window appears at the start which informs users that a new profile is being imported.

Also see:

[Distribute scan profiles via XML](#)

[Digression: Scan profile names](#)

Locally distribute scan profiles (only up to version PROXESS 5⁺)

Note



This function is no longer available for PROXESS version 5⁺ R2 or later. Older existing scan profiles may still have this property.

Nearly all settings for processing scan jobs are defined in a scan profile. A job is considered a certain amount of documents (e.g. a stack of scanned documents) that should be processed and archived with identical settings.

The scan profile settings are related to:

- The assignment to the PROXESS archive
- The transfer mode (e.g. online/offline)
- The document split and barcode settings
- The properties for individual index fields (properties fields)
- The further processing with PROXESS Xtract

Profiles are user-dependent. A created profile is initially only visible to the user who created it (e.g. for the admin or the scan user 1, scan user 2, etc.). It is therefore possible that each logged-in user can see different profiles in the Scan Client start window. Additionally, there is the option to transfer scan profiles to the server and distribute them centrally in the PROXESS Management Console.

When the setting **The profile is visible to all users** is activated in the “Advanced properties” tab, a profile is distributed locally, i.e. it is available to all users at [this local scan station](#).

Warning information



If you want to distribute a scan profile via the PROXESS Management Console, this function must be deactivated first. The deactivation cannot be reversed later.

If you want to retain the local distribution of the scan profile, you **first** have to create a copy of the profile via the [XML distribution](#).

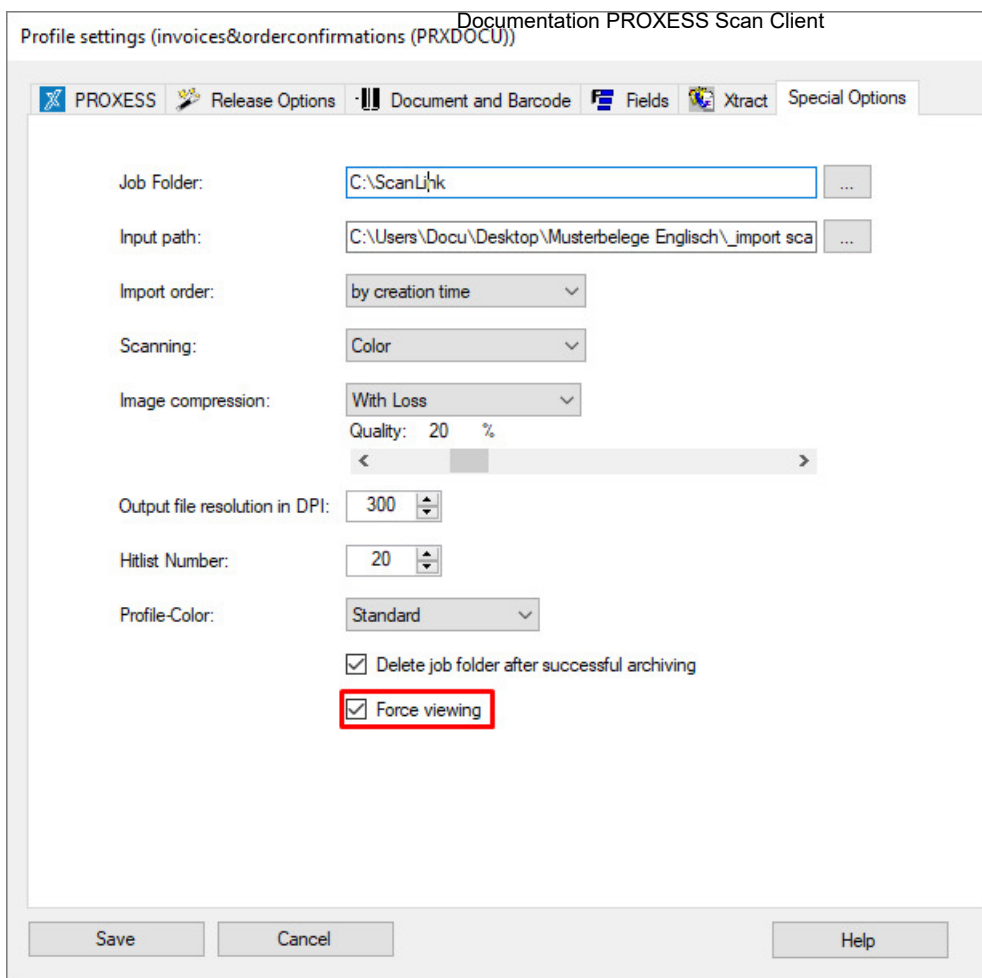


Fig.: Profile settings: Advanced properties

Also see:

[Distribute scan profiles via XML](#)

[Distribute scan profiles via PROXESS Management Console](#)

[Digression: Scan profile names](#)

Digression: Scan profile names

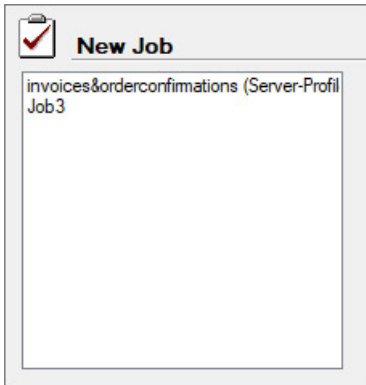


Fig.: List with Scan Link profiles

| Profile names (examples) | Meaning |
|--|--|
| Invoice_Cred | <p>This profile is a local profile that is only available at this workstation.</p> <p>Who sees this profile? A) Setting "This profile is available to all users" activated --> All users who log in at this work station can see the profile</p> <p>B) Setting "This profile is available to all users" is not activated --> This profile is only available to the user who created it.</p> |
| Target agreements_MA (server profile) | <p>This is a server profile and was distributed to the logged-in user via the PROXESS Management Console.</p> <p>Who sees this profile? - Users see this profile if it was distributed to them in the PROXESS Management Console.</p> <p>- Users with administrator rights see this profile.</p> |

Also see:

[Distribute scan profiles centrally via PROXESS Management Console](#)

[Locally distribute scan profiles](#)

[Distribute scan profiles via XML](#)

Menu of PROXESS Management Console

There are the following menu items:

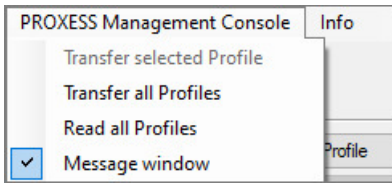


Fig.: Commands in the menu of the PROXESS Management Console

| | |
|---|---|
| <p>Transfer selected profile</p> | <p>With this command, you transfer the selected scan profile to the PROXESS server. This is the prerequisite for an assignment to other users and groups. The assignment is carried out in the PROXESS Management Console.</p> <p>The menu item only appears when you are logged in as a PROXESS administrator.</p> |
| <p>Read all profiles</p> | <p>With this command, you can manually import the central scan profiles as a user. However, this is generally unnecessary, since the scan profiles are automatically updated each time the PROXESS Scan Client is started.</p> |
| <p>Message window</p> | <p>Activate this option if you want to receive information about whether new scan profiles were imported at each login.</p> |
| <p>Set as offline profile</p> | <p>This menu item only appears if you have selected a server profile in advance. You can use this command to create a local copy of the server profile. This makes sense if you want to scan offline, for example.</p> |

Also see:

[Distribute scan profiles via PROXESS Management Console](#)

Window area “Open jobs”

The **Open jobs** area is in the center section of the start window.

Scan jobs that have already been scanned but are not yet released for archiving are displayed here. These jobs can still be loaded, edited or deleted.

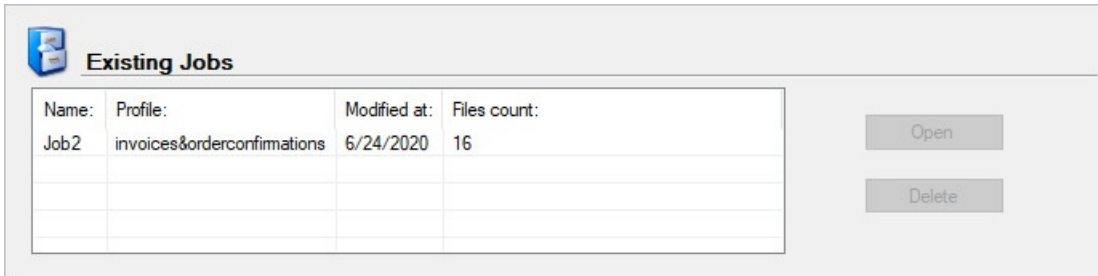


Fig.: Open job in the start window of the PROXESS Scan Client

| | |
|--------------|--|
| Load | With this button, you can access and load selected scan jobs for processing. |
| Clear | With this button, you can delete the highlighted job. |

“Released jobs” window section

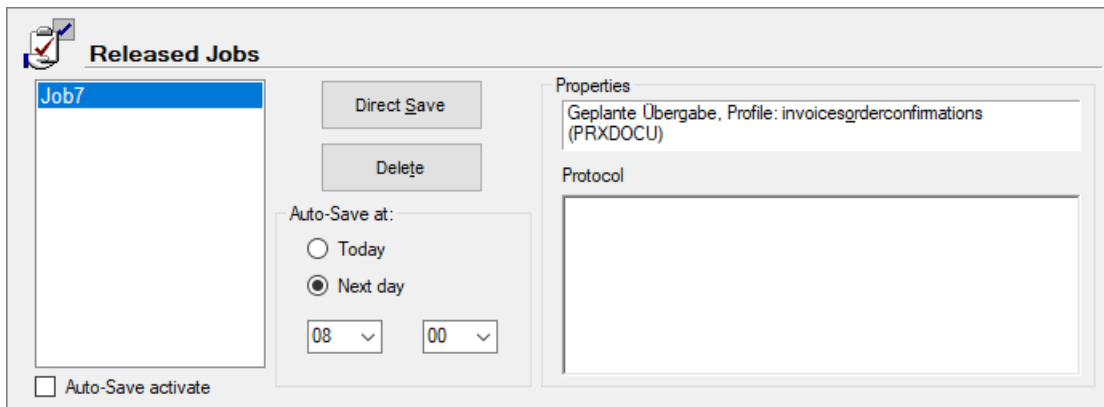



Figure: “Released jobs” area in the start window of the PROXESS Scan Client

The following settings are possible here:

| | |
|-----------------------------------|---|
| Reset to “Open job” status | Highlight the job and select the context menu via the right mouse button. With the command “Move to open jobs”, you can move the already released job back to the “Open job” area. |
| Archive directly | This button is used to archive released jobs that are selected in the left window section directly in PROXESS. Time-controlled, automated archiving is also an option. |
| Clear | With this button, the job and its documents are permanently deleted. |
| Auto-archiving by | <p>If, in the “Transfer” area of the profile settings, the online scanning procedure is selected in combination with a time-controlled transmission (“Planned transfer”), the jobs must either be processed using the button Archive directly or processed automatically using Auto-archiving.</p> <p>Auto-archiving by enables time-controlled transfer to the archive. Depending on the applied settings, this will take place either on the same day or on the next day by the specified time.</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;">  <p>A prerequisite for the automatic transfer is that the auto-archiving option is activated at the same time!</p> </div> |
| Properties | In the Properties field, the transfer settings and profile settings of the released job are listed. You can learn how to change these settings in the “Scan profiles and settings” chapter. |
| Protocol | This shows the current status of a scan job. Here you can see e.g. whether the selected scan job was archived successfully or if there is an error message. |

The “File” menu

With the “File” menu, you can access the two entries **Show login mask** and **Exit**.

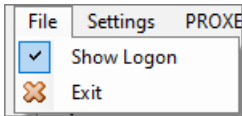


Figure: The “File” menu

| | |
|------------------------|--|
| Show Login mask | By selecting or deselecting this menu item, you control the appearance of the login mask when the PROXESS Scan Client is accessed. |
| Exit | You can exit the program with Exit. |

Also see:

[Login](#)

The “Settings” menu (logging)

With the “Settings” menu, you can access the **Logging** menu item. This menu item is not active if you haven’t created or imported a profile yet.

Fig.: The Logging dialog box

The following settings are possible:

| | |
|-----------------------------------|--|
| Log path | Enter the path for the log file(s) here. The directory: “...\PROXESS\PROXESS Scan Client\Logs” is used by default. |
| Delete log files after | Here you can enter after which time period the log files for finished jobs should be deleted. You can select from the options “never”, “30 days”, “15 days” or “1 week”. With this setting you can prevent the log directory from growing too extensively. You should choose this setting depending on the processing volume you expect. |
| Archive logs automatically | When this option is activated, the log files for completed jobs are automatically archived in PROXESS. Enter a document name that is automatically supplemented by the respective job ID during the archiving. Select the PROXESS database, the desired document and file type for archiving the log files. Only the databases and document types to which the logged-in user has the corresponding access rights are displayed. |

Documentation PROXESS Scan Client

| | |
|---------------------------|--|
| Email notification | If this option is activated, an email notification is sent to the entered email address. With this email notification, you can optionally send the respective log file as a file attachment each time or only when an error message occurs. Enter a valid email address as the return address (e.g. scanlink@samplecompany.com). |
| OK | Confirm the applied settings with OK. |
| Cancel | Cancel lets you exit the dialog box without saving your entries. |

The PROXESS Scan Client start window

After the start of the program or the login, the start window (main window) of the PROXESS Scan Client opens. The version number of the program appears in the header.

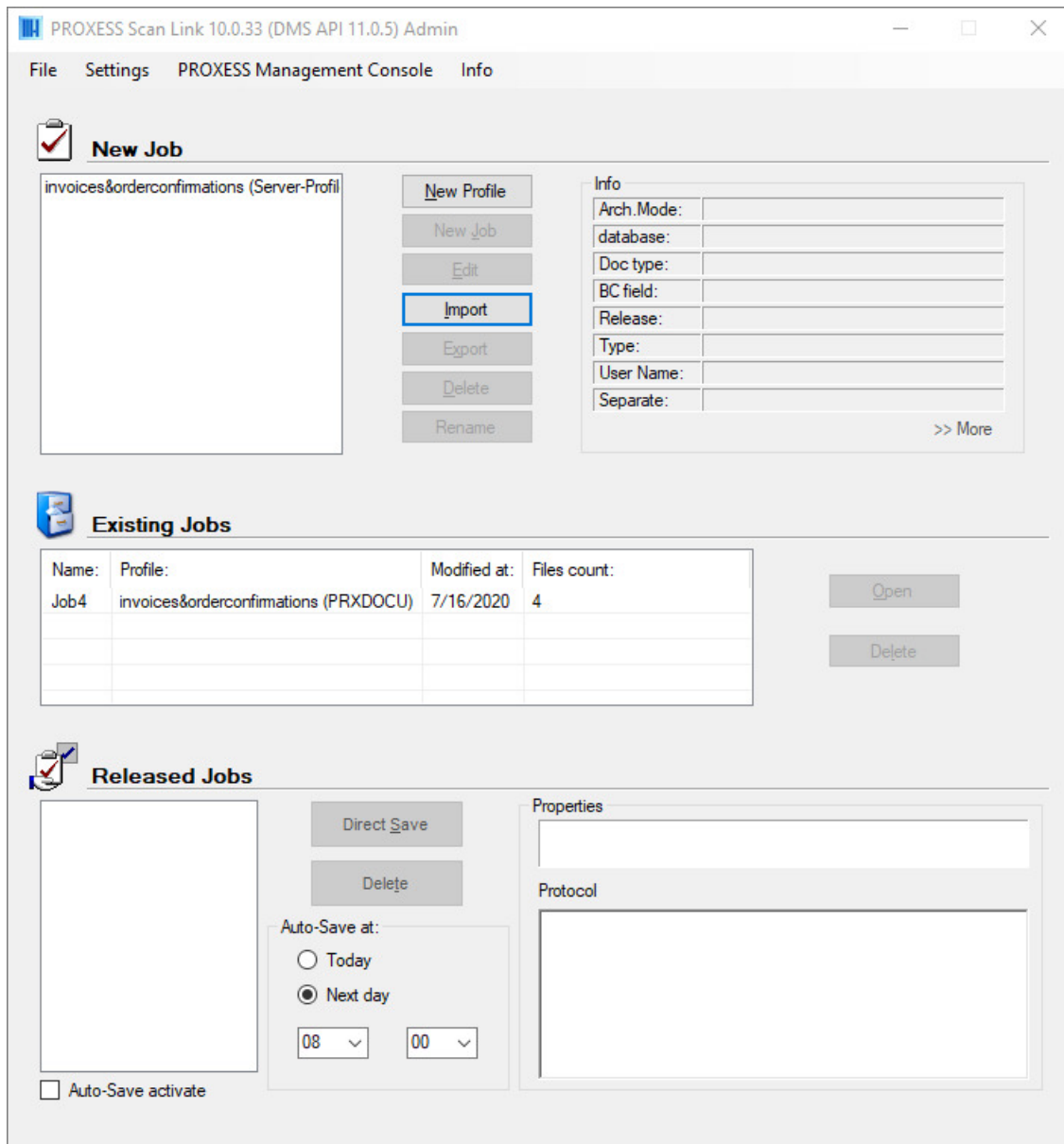


Figure: The start window of the PROXESS Scan Client

Here you will find the menus:

“[File](#)”, “[Settings](#)” and [PROXESS Management Console](#) as well as the “[Info](#)” menu with which you can access online help for the PROXESS Scan Client.

The main or start window of the PROXESS Scan Client is further divided into the three areas:

“[New job](#)”

“[Open jobs](#)” and

“[Released jobs](#)”

A job is considered a certain amount of documents (e.g. a stack of scanned documents) that should be processed and archived with identical settings. These settings are defined in [Profiles](#).

Also see:

[File menu](#)

[Settings menu](#)

[Menu of PROXESS Management Console](#)

[New job](#)

[Open jobs](#)

[Released jobs](#)

“New job” window area

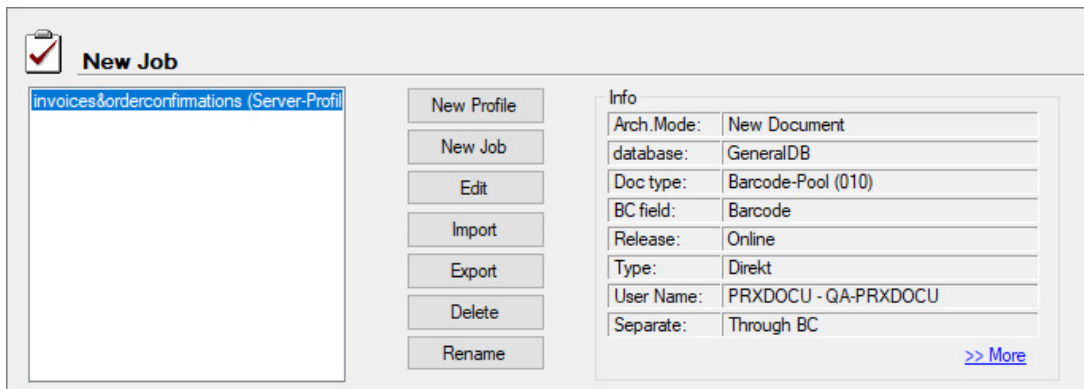


Figure: The “New job” area in the main window of the PROXESS Scan Client

The following settings are possible:

| | |
|---------------------------|--|
| <p>Profiles</p> | <p>Already created scan profiles are listed under Profiles. When the PROXESS Scan Client is started for the first time, this list is empty and all buttons are deactivated, except New profile and Import.</p> <p>If you have selected an existing profile, the other buttons will also become active. Detailed information about the highlighted profile is shown on the right.</p> |
| <p>New profile</p> | <p>With this button you define a new scan profile. Configured scan profiles will only apply to the currently logged-in user. With the “Advanced properties” tab you can make the profile accessible to all users.</p> <p>You can learn more about creating a new scan profile in the chapter “Create new profile”.</p> |
| <p>New job</p> | <p>With the New job button, you open a new scan job. The scanning interface of PROXESS Scan Client will open. First you must have selected a profile on the left. Now you can scan documents or import and edit TIFF files.</p> <p>(Alternative access by double-clicking scan profile)</p> |
| <p>Edit</p> | <p>You can change scan profiles with the Edit button.</p> |
| <p>Import</p> | <p>With the Import button, you can import individual scan profiles in the format of an XML file.</p> <p>This makes sense particularly when different PROXESS scan stations should use the same settings. The prerequisite for importing a scan profile via XML file is that an active scan profile was exported first.</p> |

| Documentation PROXESS Scan Client | |
|-----------------------------------|--|
| Export | You can also make a created scan profile available to other workstations with the Export button. The profile will be stored as an XML file and can now be imported by other workstations (see above). |
| Clear | You can delete existing scan profiles with the Clear button. |
| Rename | With the Rename button you can rename existing scan profiles. |
| Info | The Info box lists the most important parameters of a scan profile. |
| >> More | All settings of a scan profile are listed here in the form of a clear directory structure. |

Also see:

[Scan interface](#)

[New profile](#)

[First steps](#)

Structure of the editing window

To open the editing window, highlight a profile in the start window and select the **New job** command (alternatively: double-click the desired profile).

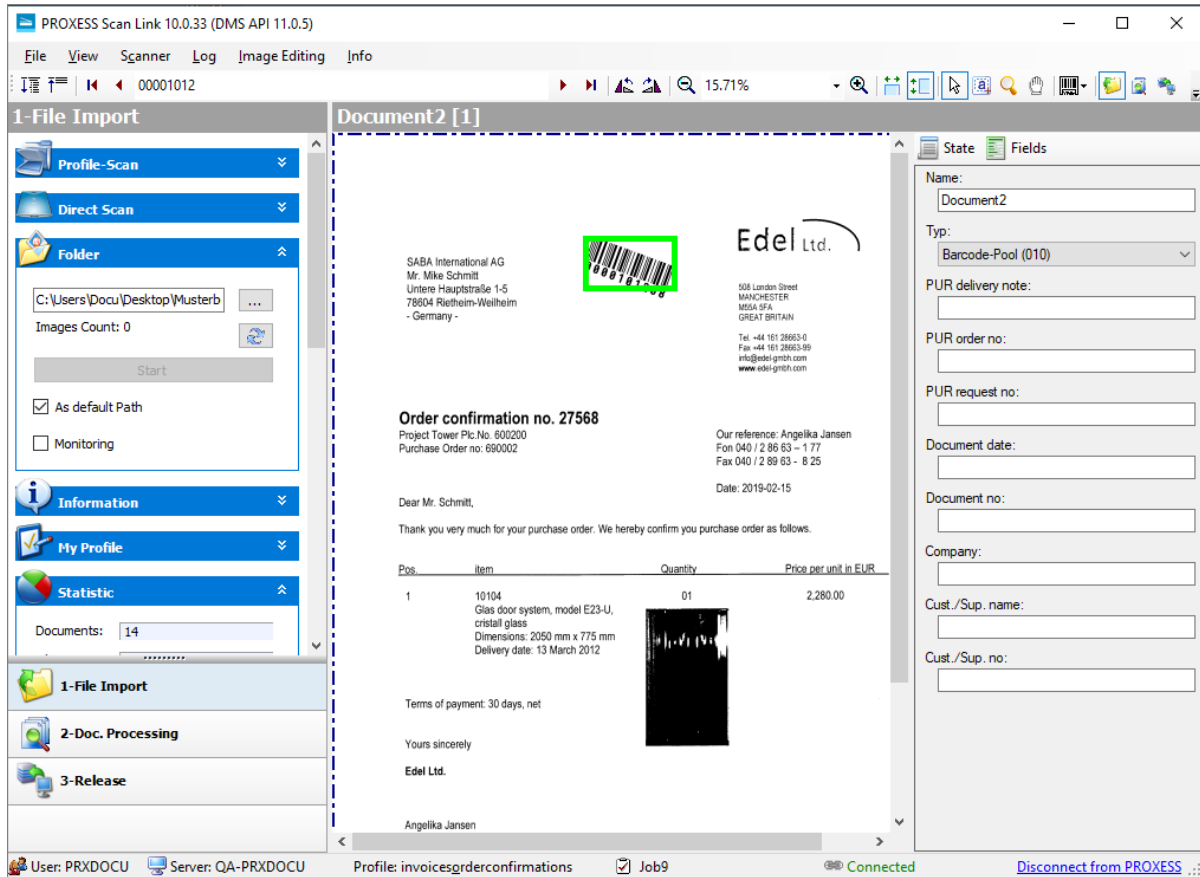


Figure: Scan editing window with left, center and right image area

The editing window is divided into three areas:

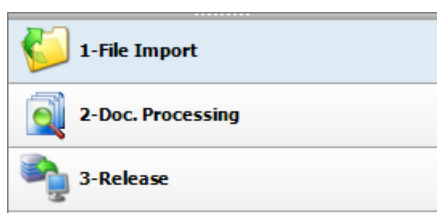


Fig.: The three processing steps during scanning

In the left image area, you control the **Import**, the **Document management** and the **Transfer** of the documents into the archive. Clicking each command opens the associated functions in the top left area of the image.

In the center of the image, the imported documents are displayed with their page number (e.g. image 12 of 20).

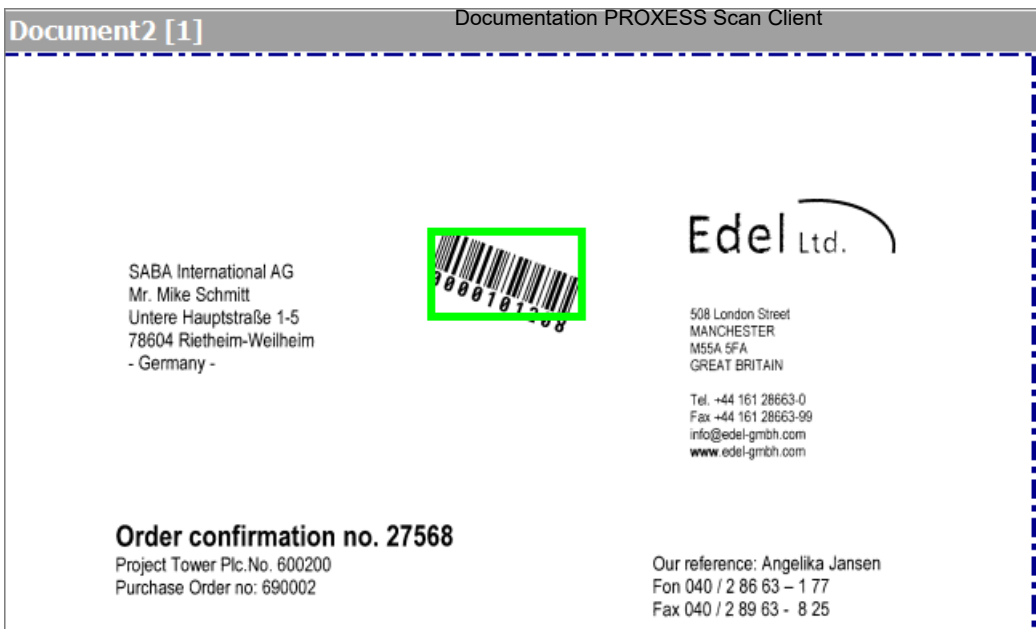


Fig.: PROCESS Scan Client editing mask (display of the scanned documents)

In the [right image area](#) you have the option to display a status overview for the current job. Information about the document and page count and recognized barcode number (status), a list of the scanned documents (images) and the available fields for indexing the document (fields) are shown here.

| Document | Barcode | ColumnHeader |
|----------|----------|--------------|
| 1 | 00001012 | 1 |
| 2 | 00001012 | 1 |
| 3 | 00001008 | 2 |
| 4 | 00001007 | 1 |
| 5 | 00001002 | 1 |
| 6 | 00001012 | 1 |
| 7 | 00001003 | 1 |
| 8 | 00001004 | 1 |
| 9 | 00001005 | 1 |
| 10 | 00001006 | 1 |
| 11 | 00001000 | 1 |

Fig.: Status overview of scanned documents

By clicking the "Document", "Barcode" or "Number" columns, the documents are sorted in ascending or descending order according to the column.

The menu bar

The menu bar of the scan interface of the PROCESS Scan Client offers the menus "File", "View", "Scanner", "Log", "Edit images" and "Info".

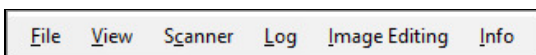


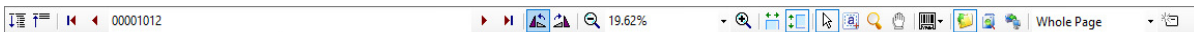
Fig.: Menu bar of the editing window

You can find the following commands in the menus:






| | |
|--------------------|--|
| "File" menu | The Exit command is under the "File" menu. You can use this to close the editing window and return to the start window of the PROCESS Scan Client, in which you can create profiles, load or delete open jobs or archive released jobs. |
|--------------------|--|












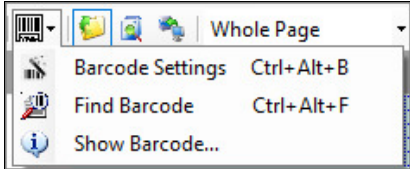



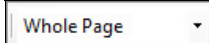

| Documentation PROXESS Scan Client | |
|-----------------------------------|---|
| View | In the “View” menu, you open and close the dialogs for the Import processing step by hiding or displaying the detailed view for Profile scan, Direct scan, Folder, Info and My profile . |
| Scanner | In this menu you can find all settings relating to the scanner. They correspond to the menu items Profile scan and Direct scan in the Import processing step . |
| Log | See the Settings menu (logging) |
| Image editing | Here you can rotate documents that were scanned upside down and save them correctly. This prevents users having to rotate such a document each time it is viewed. You can also enlarge or reduce the size of the documents for viewing. |
| Info | <p>In the “About” menu item, you will find information about the installed PROXESS Scan Client program version.</p> <p>In the “My profile” menu item, you can find all settings for the current scan profile in a clear directory structure.</p> <p>With the menu item “Help”, you can access the online help.</p> |

The image menu (icons)



Several icons for operating Scan Client are positioned below the menu bar:

| | |
|---|--|
|  | In the “Document management” processing step, the “Expand” icon opens the individual documents with pages in a clear tree structure. You can display individual documents by clicking the plus symbol of the document. |
|  | The “Reduce” icon closes the above view as a tree structure so that only the individual documents without the pages are visible. |
|  | Shows the first page of the current document stack |
|  | Shows the previous page of the document stack |
| <input data-bbox="183 1926 422 1960" type="text" value="0019283802"/> | Contains the recognized barcode number. It can be changed manually if needed. |
|  | Shows the next page of the document stack |

| | |
|--|---|
|  | Shows the last page of the document stack |
|  | Rotate the currently shown page by 90° to the left |
|  | Rotate the currently shown page by 90° to the right |
|  | With the buttons, the document view can be optionally reduced, enlarged or adjusted by percent. |
|  | Fit page view to window width |
|  | Fit page view to window height |
|  | Switch to default editing mode |
|  | Select and enlarge image sections |
|  | Temporary enlargement of subsections (magnifying glass) |
|  | “Grabbing” and moving the displayed image area, e.g. if the entire image isn’t shown. |
|   | <p>Opens the menu Barcode options:</p> <p>The menu item Barcode options opens the dialog for settings for barcode recognition (see Barcode settings).</p> <p>The Find barcode command searches the entire scanned image again for barcodes that were not yet captured automatically.</p> |
|  | Switches to editing mode Import |
|  | Switches to editing mode Document management |
|  | Switches to editing mode Transfer |
|  | Selection of a zone profile (see below) for the current document. For documents with several barcodes, for example, this can be used to narrow down the barcode recognition to a certain zone and thus only find relevant barcodes. |
|  | Creating a new zone profile (see image below) |

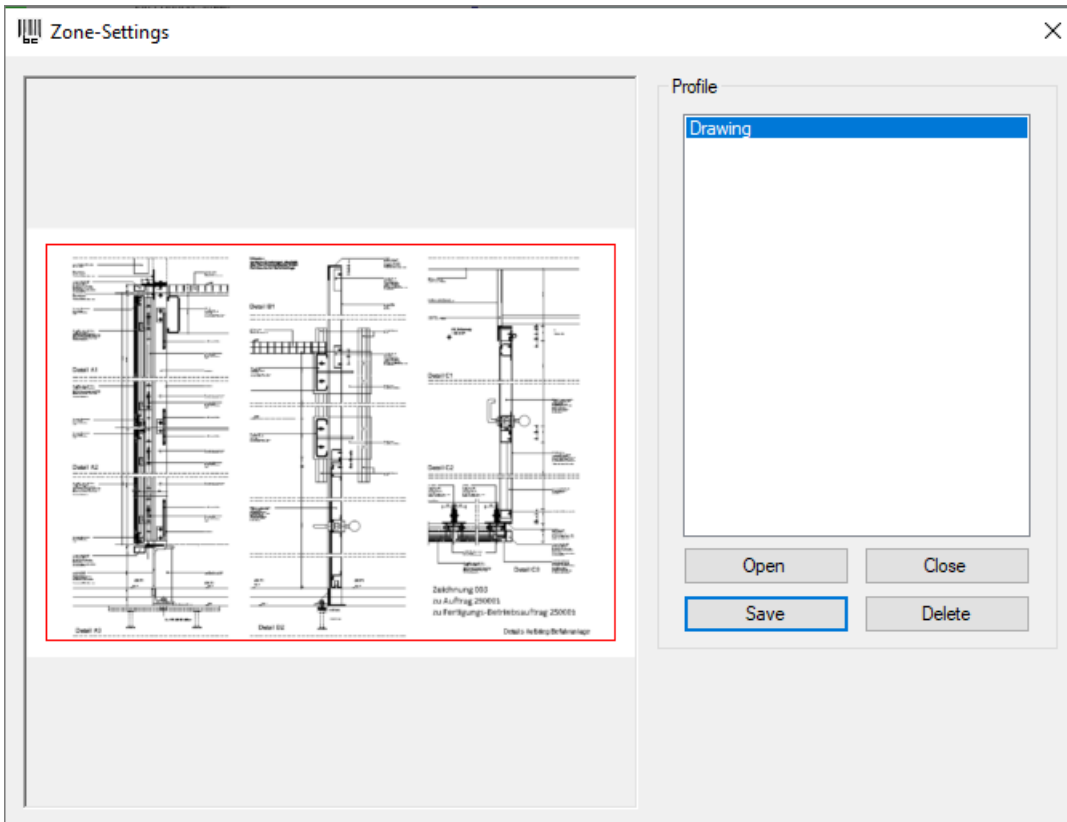


Fig.: "Zone setting" dialog for barcode recognition

With the **Open** command, select a sample scanned document on the hard drive. Highlight a section of the image with the mouse. Use the **Save** command to assign a name to a new zone or update an existing zone. Now the zone profile is available for the current scan profile.

The status bar

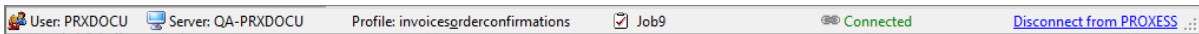


Figure: Status bar of the editing window

The following information is listed in the status bar at the lower edge of the image:

- Logged-in user
- Applied PROXESS server
- Selected scan profile
- Job number
- Status of connection to the PROXESS server (**No connection** or **Connected**)

With the **Login to PROXESS** link, you can restore an interrupted connection to the applied PROXESS system. With **Log out from PROXESS**, an existing connection to the PROXESS system is canceled.

Also see:

[Import](#)

[Document management](#)

[Transfer](#)

[Barcode settings](#)

Transfer

With this processing step, you transfer the documents to the subsequent system. This is generally the PROXESS archive or the automatic document processing system PROXESS Xtract.

Depending on the applied [transfer settings](#), the documents are transferred directly or time-controlled, online or offline.

Step by step:

Open the editing window by double-clicking the desired [scan job](#) and select the processing step “**Transfer**” either through a selection in the left area of the screen or in the image menu bar at the top.

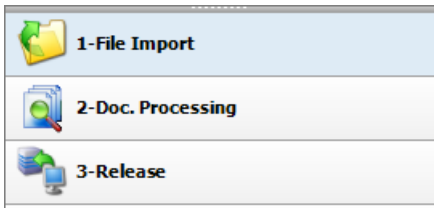


Fig.: The three processing steps during scanning

Now select the command **Archive** or **Release** for the transfer.

If the transfer is successful, you will receive the corresponding information.

If there are errors during the transfer, you will also receive a corresponding message. Additionally, the error log is displayed in the left area of the screen.



Your documents are only archived in PROXESS and available there for retrieval (also for the PROXESS Index Miner) after a job has been transferred successfully.

Document management

After the documents are scanned or imported, they are processed in document management. The purpose of document management is to review scanned documents visually, make corrections and index documents.

Step by step:

To access the scan editing features, open a [scan profile](#) and scan new documents or open an existing [scan job](#) with a double click.

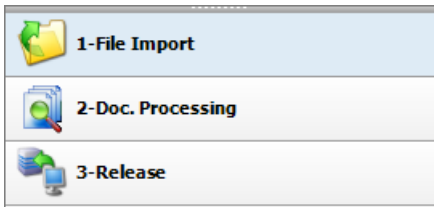


Figure: The three processing steps during scanning

After accessing the editing window, you are automatically at the first processing step, "Import". The "Document management" function can be accessed either via the bar in the lower left area of the screen (see fig.) or via the icon with that name in the [image menu bar](#) at the top.

Now the structure of the imported document stack is displayed as a tree layout in the left area of the screen. You can collapse and expand this tree layout with the icons "Expand" and "Reduce" (see [image menu](#).)

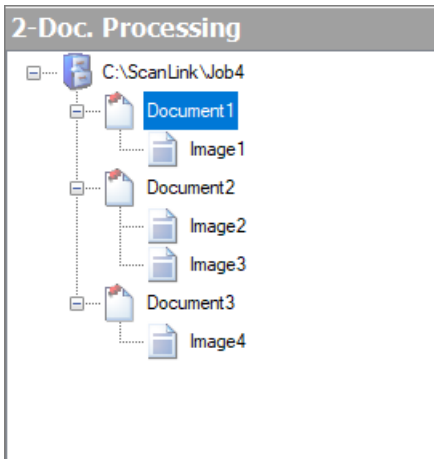



Fig.: Documents imported for document processing

Depending on the settings in the "Document and barcode" section, the documents are structured in the left tree view. The document and the images listed below it already represent a single-page or multipage document for archiving. You can see the currently marked image or document as a preview at the center of the screen. Here a recognized barcode has a colored border (also see [Barcode settings](#)) and is displayed in the [Image menu bar](#) on top.

Example: "Document binding by barcode" was selected in the settings. This means that the first image of a document has a barcode in each case. The following document pages do not have a barcode. The next imported page with a barcode signals the start of a new document.

The following manual editing functions are available to you in this processing step:

| With drag and drop | Documentation PROXESS Scan Client |
|---|---|
| <p>Move image pages</p> | <p>Image pages can be moved within and between documents with drag and drop. If the first page of a document with a recognized barcode is moved, an error message appears in the list on the right: "BC not recognized."</p> |
| <p>In the context menu</p> | |
| <p>Rotate and save image pages</p> | <p>With the context menu, images that were scanned in upside down can be rotated to the right or left by 90 degrees each and saved correctly.</p> |
| <p>Clear</p> | <p>You can also delete an image/document with the context menu.</p> <p><u>Deleting with a keystroke combination:</u> DEL = delete the marked image CTRL-DEL = delete the marked document with images</p> <hr/> <div data-bbox="555 891 1355 1010" style="border: 1px solid black; padding: 5px;">  <p>To avoid error messages during the deletion, the logged-in Windows user should receive local administrator rights.</p> </div> <hr/> |
| <p>Documents splitting</p> | <p>This enables you to manually set the beginning of a document. This option is used e.g. if a barcode wasn't recognized. The image stack is divided at this point and a new document is attached to the stack here with all the following pages. You can reach this function via the context menu.</p> |
| <p>Retroactive barcode recognition</p> | |
| <p>Find barcode</p> | <p>You can start a retroactive recognition of the barcode on the current page with the image menu item "Barcode options", Find barcode.</p> |
| <p>Manual barcode entry</p> | <p>You have the option of entering the barcode manually into the provided field on the top left in the image menu bar.</p> |

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Indexing

In the right area of the screen, you can find another type of representation of the scan batch divided into **status and fields**.

- The **status** provides an overview of all documents of the current job with the associated barcode number and number of included pages.
- The **Fields** column shows an index mask for the active document. Here you can add further index properties for archiving to the scanned documents.

The status overview provides an overview of the imported files and documents. If all pages with the same barcode should be combined into one document, the overview in the Files tab is particularly well-suited for a visual check.

The figure shows two screenshots of the PROXESS Scan Client interface. The left screenshot shows the 'Documents' tab with a table of document status. The right screenshot shows the 'Files' tab with a table of file details.

| Document | Barcode | Colum... |
|----------|----------|----------|
| 1 | 00001012 | 1 |
| 2 | 00001008 | 2 |
| 3 | 00001007 | 1 |

| Document | File | Barcode |
|----------|--------|--------------|
| 1 | Image1 | 00001012 |
| 2 | Image2 | 00001008 |
| 2 | Image3 | Unrecognized |
| 3 | Image4 | 00001007 |

Fig.: Status overview of imported document in two variants

The displayed fields and their properties depend on the allocated scan profile (see chapter: [Fields](#).)

This indexing can be carried out with a manual entry or by using the PROXESS Index Miner (you can find settings for this under [Field properties](#).)

Indexing with the PROXESS Index Miner

PROXESS Index Miner supports users in manually indexing documents. With defined query fields (e.g. "CSno." as customer number), already archived documents with a certain customer number are displayed. Then their index values can be automatically adopted via a mouse click.

Fig.: Fields for the manual indexing of the scanned document

Red exclamation mark: indicates a mandatory field

The document can only be saved and transferred if there is an entry in this field. The document name and document type are automatically always mandatory fields.

Blue arrow: indicates a “query field”.

If a value is entered here, a hitlist appears with documents that are already archived in PROXESS and have an identical value. If a customer number is entered here, for example, already archived documents by the same customer will appear in the hitlist.

Green arrow: indicates a “result field”

If you now select an entry from the hitlist, the values of this already archived document will also be adopted for the new current document.

In the displayed example, the field “CSno.” marked with a blue arrow represents a query field. The fields “CS name”, “Street” and “Zip_City” marked with the green arrow are result fields that are filled automatically after a successful search.

Enter your description properties into the query field(s).

Exit the field with one of these **keystroke combinations**:

| | |
|----------------------|---|
| Tab or enter | Jump to the next field If this is a query field, the current field data is used to create a hitlist. |
| CTRL + Enter | Jump to the next field If this is a query field, the field data of all query fields is used to create a hitlist. |
| F12 | Jump to the next field without creating a hitlist |
| ALT + Page up | Jump to the preceding document (if available) |

| Documentation PROXESS Scan Client | |
|-----------------------------------|--|
| ALT + Page down | Jump to the next document (if available) |

A hitlist appears with existing entries in the archive that corresponds to the query values. You can limit the displayed hits in the hitlist under [Advanced properties](#).

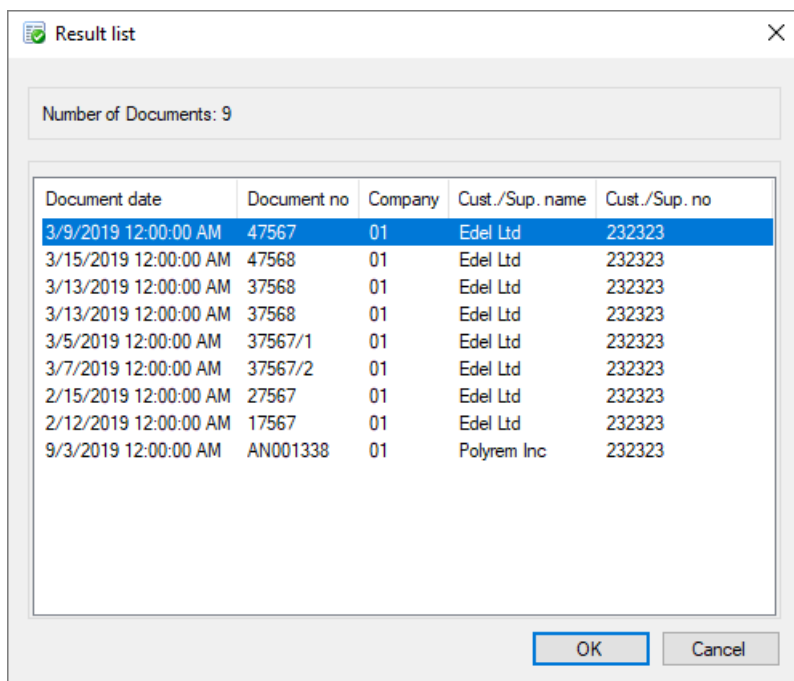


Fig.: Hitlist with matching entries from the archive

Save your entries with the **Enter** key. Now the next document and index mask are shown automatically.

If all documents in the scan job are aligned correctly, bound and indexed, the next processing step will start: **"Release"**.

Document import

To access the scan editing features, open the editing window by double-clicking a scan profile or an existing scan job.

The scan editing is generally performed in these three processing steps:

- First step: **Document import**
- Second step: [Document management](#)
- Third step: [Transfer \(to the archive\)](#)

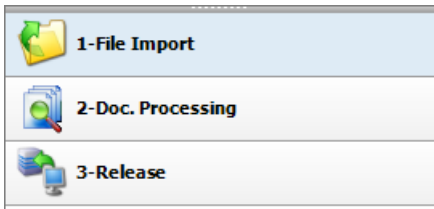




Fig.: The three processing steps of the PROXESS Scan Client

After accessing the editing window, you are automatically at the first processing step, "Import".

There are three options for importing when importing/scanning documents:

- Profile scan
- Direct scan
- Importing from a folder

The visibility of the individual sections can be determined via the "View" menu. You can also expand and collapse the sections with the arrow symbols   in the left area of the screen.

Profile scan

Scanning documents with the "Profile scan" option makes it possible to set up fixed scanner profiles in the PROXESS Scan Client, to save them and use them whenever needed.

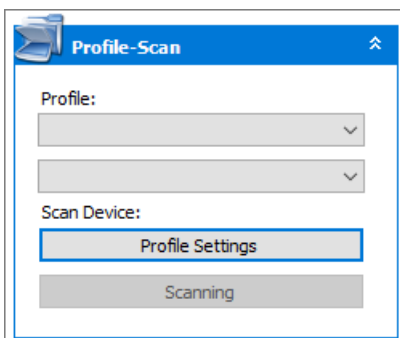


Figure: "Profile scan" menu section in the "Import" processing step

In the scanner profiles, you can store settings for the accessed scanner, the DPI resolution, brightness, paper alignment and more. This enables you to categorize recurring documents at your company and store fixed scan settings for the various types of documents (e.g. yellow delivery slip paper, very faintly printed paper or A5 receipts that are inserted in landscape format).

The scanner profiles are defined for each scanner and are then available to all users in all established [scan profiles](#). Open the "Profile Settings" menu to create a new scanner profile. You can find details about the possible settings under: [Scanner settings](#)

Use **Start scanning (CTRL + P)** to import the documents placed in the scanner.

Direct scan

Select the **Direct scan** option if you want to access the manufacturer's own scanner dialog. This might offer additional setting options for the above-mentioned scanner settings.

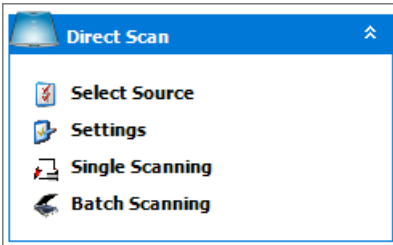


Figure: "Direct scan" dialog area

Select the command **Select source** to select a connected scanner.

Use the **Settings** command to open the manufacturer-specific scanner configuration dialog and then apply the desired settings.

The scanning process is started with the commands **Single scan** or **Batch scan**. If you select **Single scan (CTRL +S)**, only one page is scanned. If you select **Batch scan (CTRL +B)**, the entire paper stack is imported.



To access the scanner's Twain driver, the logged-in Windows user must have full access to the Windows installation directory. Otherwise there may be error messages during scanning or the accessed scanner won't react. Grant the respective rights to the logged-in Windows users or grant them local administrator rights.

Importing from a folder

Use the option **Import from a folder** to import already existing scanned files from a directory at a workplace. This makes it possible to use e.g. network scanners or multifunctional devices that aren't locally connected to the scan workplace. Only Group 4 compressed TIFF files are accepted.

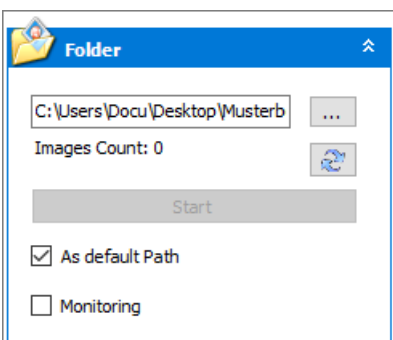




Figure: "Scanning from a folder" in the Import processing step

With the  button, you can select an import directory for your scanned files at your workplace. The directory shown by default corresponds to the import directory listed in the "[Advanced properties](#)" tab of the active scan profile.

The number of image files available there is displayed. The display can be updated with the  button.

The “**as default path**” function makes it possible to define a default path for importing files across all profiles. However, if a separate import directory should be used for a certain scan profile, this can be specified via the scan profiles in the “**Advanced properties**” tab.

Start importing files from the monitor folder with **Start (CTRL +F)**.

With the activated “**Monitor**” option, the specified folder is checked for existing scanned files. If there are scanned documents in the folder, the import process is started automatically.



The scan mask must be open for the monitor function to work.

Now the scanned documents are available for further processing in [Document management](#).

Info

When you open the “Info” dialog area, you will see detailed information about the currently displayed document:

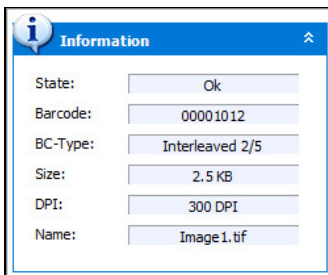


Figure: Info

My profile

Here you can see information about the currently used scan profile.

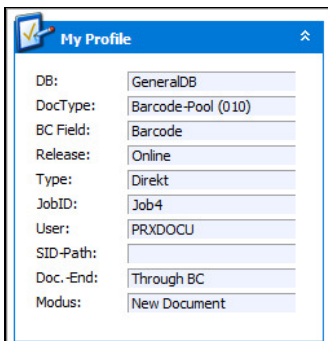


Figure: My profile

Statistic

Here you can see a list of the imported documents with the imported pages and the recognized barcodes. If you selected the option “Barcodes only on first page”, you can quickly see at a glance whether all barcodes were recognized and all pages were properly split.

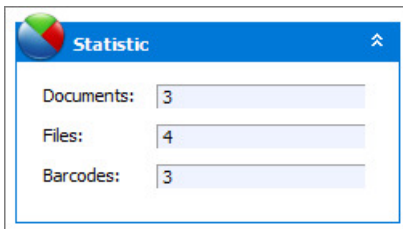


Fig.: Statistic overview for the import

Also see:

[Document management](#)

[Transfer](#)

[Scanner settings](#)

[Editing window](#)

Scanner settings

You can open this dialog either with the “Scanner” menu and the menu item “Settings with profile” or via the “Profile scan” section with the “Profile settings” option.

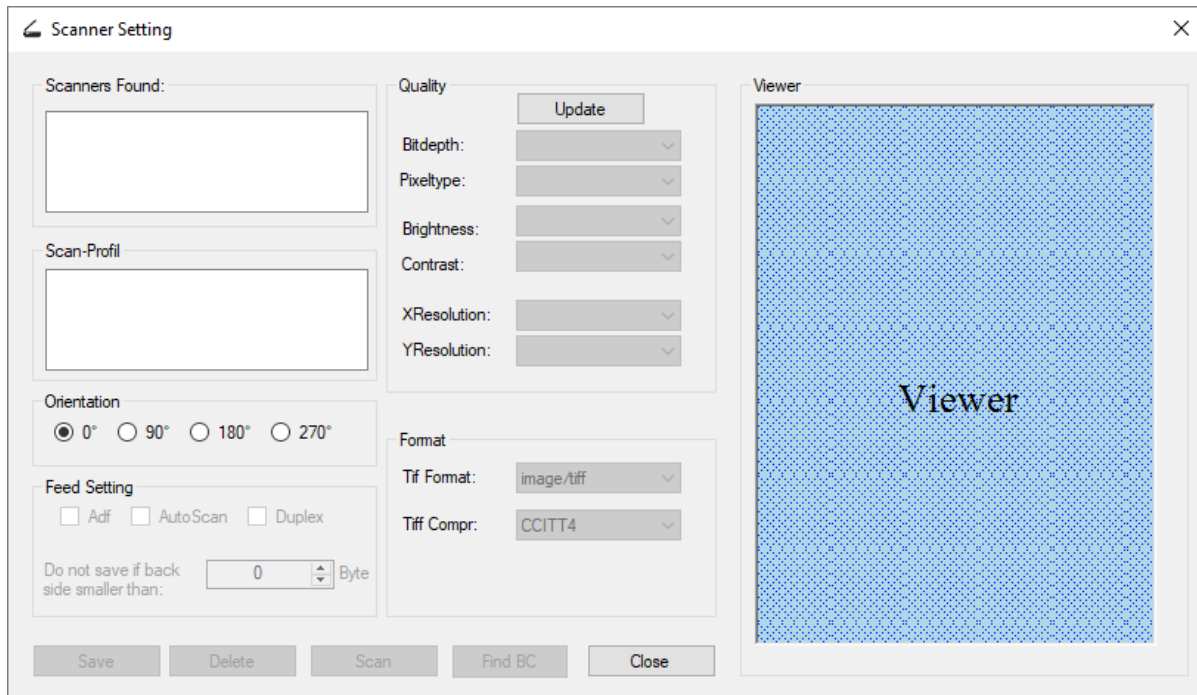


Figure: Dialog field “Scanner settings”

These scanner settings do **not** correspond to the manufacturer-specific configuration dialogs for the respective scanner. You can access these dialogs through the “Driver settings” menu item in the “Scanner” menu.


The following settings are available to you here:

| | |
|-----------------------|--|
| Scanners found | All detected scanners are listed here. Select a scanner <u>with a double-click</u> . |
| Scan profiles | All scanner profiles of the selected scanner are shown here. Select a scanner profile <u>with a double-click</u> . |
| Orientation | This way scanned documents can be automatically rotated before being saved as a TIFF file. |
| Feed setting | <p>ADF: If a scanner has a tray and automatic document feed (ADF), you can preset the document feed here with the ADF option.</p> <p>AutoScan: This speeds up the scanning process, since the scanner’s internal memory is also used.</p> <p>Duplex: Scans the front and back page.</p> |

| Documentation PROXESS Scan Client | |
|---|--|
| Do not save if back page smaller than ... bytes. | The value entered here prevents a blank back page from being stored. This lets you import single-sided and double-sided documents in a stack together. This function is deactivated when the "0" value is entered. |
| Quality | All values entered under "Quality" are saved with the Update command. |
| Color depth | You can choose from the following values (depending on the active scanner): 1 = black/white 8 = gray levels 24 = color By saving with the Update command, the values for color and color depth are synchronized automatically. |
| Color | You can choose from the following values (depending on the active scanner): BW = black/white GRAY = gray levels RGB = color By saving with the Update command, the values for color and color depth are synchronized automatically. |
| Brightness | Enter a value for the brightness setting while scanning here. If the field is inactive, the active scanner doesn't offer this setting. |
| Contrast | Enter a value for the contrast level while scanning here. If the field is inactive, the active scanner doesn't offer this setting. |
| XResolution | Horizontal DPI solution at which the scanning should be performed (Recommendation for barcode recognition: 300 dpi or higher) |
| YResolution | Vertical DPI solution at which the scanning should be performed (Recommendation for barcode recognition: 300 dpi or higher) |
| Format | |
| File format | Information about the saved file format. The PROXESS Scan Client only supports the TIFF image format. That is why this field is inactive and only used for information purposes. |
| Compression | CCITT4 = recognized compression standard for TIFF files. This field is inactive and only used for information purposes. |

| Documentation PROXESS Scan Client | |
|-----------------------------------|--|
| Save | With the Save command, all applied settings for the active scanner are stored in the scanner profile. |
| Clear | The highlighted scanner profile is deleted with the Clear command. |
| Scan | Execute a preview scan with the Scan command. This option is expedient for testing the applied settings. The scanned documents are not imported into the PROXESS Scan Client yet. |
| Find BC | With the Find BC command, the barcode recognition is tested with the current settings. You will receive a message about which barcode was recognized. |
| Close | Close lets you exit the dialog box without saving your entries. |

Barcode recognition (settings)

You can access the barcode settings with this icon  in the barcode options for the image menu of the editing mask.

All settings here refer to the technical recognition process of barcodes. Test the best setting with your documents and save it in the current scan profile.

The logical evaluation of the recognized barcode, e.g. as index values, and the further editing in the archiving process are described in the chapter [Document and barcode options](#).

Start with the default settings and change them only if needed.

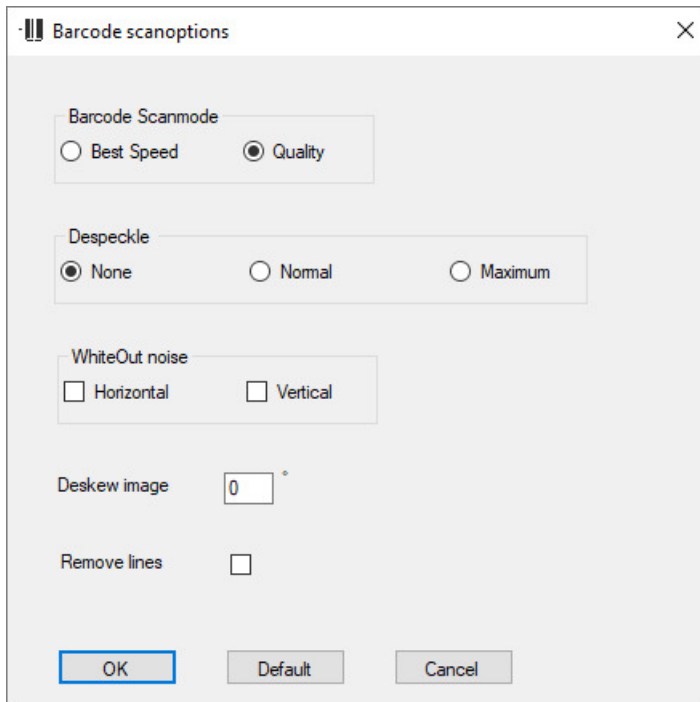


Figure: Barcode settings

The following settings are available:

| Settings | |
|----------------------------------|---|
| Optimize barcode scanning | Quality (default setting) Speed: Select this setting if the barcode recognition is too slow. This may result in a worse recognition rate. |
| Despeckle | None (default) Normal or maximum: Select these settings if the quality of the paper document is very poor (e.g. in case of faint or repeated copies) |
| Correct image sharpness | Optimizes blurry templates. Select this option if the originals are compressed or elongated or if they have smudged areas. |

| Documentation PROXESS Scan Client | |
|-----------------------------------|---|
| Rotation | <p>The barcode recognition software already automatically aligns originals that were fed in at an angle.</p> <p>If a value (in degrees) is specified here, the software straightens the scanned image up to this limit.</p> <p>If the value is exceeded, the software will not perform any further alignment.</p> |
| Remove lines | <p>Removes horizontal or vertical lines within the barcode area that are not part of the barcode.</p> <p>If this option is activated, the barcode recognition slows down.</p> |
| OK | <p>Save the applied settings with OK.</p> |
| Default | <p>With Default, you can reset the entries to the default values (see fig. above).</p> |
| Cancel | <p>Cancel lets you exit the dialog without saving the entries.</p> |

Frequently asked questions and troubleshooting (FAQs)

FAQ 1: You can't create or edit a scan profile, since you are asked for a password.

Solution: The password is: 12345678.

FAQ 2: The scan profile can't be saved since the button is deactivated.

Possible causes: Not all necessary fields are filled in.

If you are working with Xtract: Check the [Xtract settings](#) for completeness and accuracy.
Do the entered directory paths exist?

If you are working without Xtract: Check whether the option **Without Xtract** is activated in the ["Xtract" tab](#).

You have activated barcode recognition but not assigned a field to the barcode. Assign a target field to the barcode. (See [document and barcode](#))

FAQ 3: When the program is started, an error message is displayed: "Updating the database structure failed."

Possible cause: The program can't be started since the user doesn't have full access to the Scan Client database in the PROXESS installation directory.

Solution: The logged-in Windows user should receive local administrator rights.

FAQ 4: The scanner doesn't respond or an error message appears while scanning.

Possible cause: To access the scanner's Twain driver, the logged-in Windows user must have full access to the Windows installation directory.

Solution: The logged-in Windows user should receive full access to the Windows installation directory or local administrator rights.

FAQ 5: When attempting to delete scanned images in the document management, the error message appears: "The index was outside the area" or "It may not be possible to complete the enumeration process."

Possible cause: The logged-in Windows user may not delete files and/or doesn't have full access to the installation directory of the PROXESS Scan Client (e.g. C:\Programs\PROXESS\PROXESS Scan Client\) or the working directory (e.g. C:\Scan Client.)

Solution: The logged-in Windows user should receive full access to the installation directory of the PROXESS Scan Client or local administrator rights.

Keystroke combinations—shortcuts

Start the scanning process:

| | |
|-----------------|--|
| CTRL + P | Start profile scanning |
| CTRL + S | Direct scanning: Start single scanning |
| CTRL + B | Direct scanning: Start batch scanning |
| CTRL + F | Start folder scanning |

You can find detailed information about the functions in the [Import](#) chapter.

Delete documents and images:

| | |
|----------------------|--|
| Delete | Delete the highlighted image |
| CTRL + Delete | Delete the highlighted document and all images in the document |

You can find detailed information about the functions in the [Document management](#) chapter.

Indexing of documents:

| | |
|------------------------|---|
| Tab or enter | Jump to the next field If this is a query field, the current field data is used to create a hitlist. |
| CTRL + Enter | Jump to the next field If this is a query field, the field data of all query fields is used to create a hitlist. |
| F12 | Jump to the next field <u>without</u> creating a hitlist |
| ALT + Page up | Jump to the preceding document (if available) |
| ALT + Page down | Jump to the next document (if available) |

You can find detailed information about the functions in the Document management chapter in the section [Indexing_with_the_PROXESS_index_miner](#).

Index

"Import" processing step

[Document import](#)

2D barcode

[Document and barcode](#)

2D-Barcode

[Feldeigenschaften.htm#2D_Barcode](#)

Abfragefeld (Indexierung)

[Dokumentverwaltung.htm#Abfragefeld__Indexierung_1](#)

[Dokumentverwaltung.htm#Abfragefeld__Indexierung_](#)

access database

[Digression: Profile management with SQL database](#)

Active Directory integration

[Login](#)

administrator

[Digression: Profile management with SQL database](#)

administrator rights

[Login](#)

advanced properties

[Advanced properties](#)

Archive job

[Released jobs window section](#)

archive logs automatically

[Settings menu](#)

archiving

[Login](#)

archiving mode

[PROXESS](#)

assign archive

[PROXESS](#)

authentication option

[Login](#)

automatic profile matching at login

[Login](#)

barcode

[FAQs](#)

[PROXESS](#)

[Scanner settings](#)

[Transfer](#)

Barcode

[Barcode recognition \(settings\)](#)

[Document and barcode](#)

barcode check digit

[Document and barcode](#)

barcode field

[PROXESS](#)

barcode number range

[Document and barcode](#)

barcode recognition

[About PROXESS Scan Client](#)

[Barcode recognition \(settings\)](#)

[FAQs](#)

[Scanner settings](#)

barcode separation (Xtract setting)

[Xtract settings](#)

barcode settings

[Barcode recognition \(settings\)](#)

[New profile](#)

barcode type

[Document and barcode](#)

barcode validator

[Document and barcode](#)

Barcodefilter setzen

[Dok_u_Barcode Optionen.htm#Barcodefilter_setzen](#)

Barcodevalidierer

[Dok_u_Barcode Optionen.htm#Barcodevalidierer](#)

batch scan

[Document import](#)

bind documents

[Transfer](#)

bind documents by barcode

[Transfer](#)

bind pages with same barcode

[Document and barcode](#)

bind subsequent pages with same BC

[Document and barcode](#)

[Document management](#)

central management

[Login](#)

client (Xtract)

[Xtract settings](#)

Color scan

[Advanced properties](#)

combine pages

[Document and barcode](#)

configuration file (Xtract)

[Xtract settings](#)

connection to PROXESS server

[Login](#)

[PROXESS](#)

core field

[Fields](#)

data matrix

[Document and barcode](#)

Data Matrix

[Feldeigenschaften.htm#Data_Matrix](#)

data source

[Digression: Profile management with SQL database](#)

database

[Digression: Profile management with SQL database](#)

[Login](#)

define barcode field

[Document and barcode](#)

define barcode zone

[Structure of the editing window](#)

define validation rule

[Fields](#)

delete scan profile

[Window area_New job](#)

determine background color for scan profile

[Advanced properties](#)

direct archiving

[Transfer](#)

direct scan

[Document import](#)

direct transfer

[Transfer](#)

Distribute scan profiles via PROXESS Management Console

[Distribute scan profiles via PROXESS Management Console](#)

Distribute scan profiles via XML

[Export and import scan profiles \(via XML\)](#)

divide document

[Document management](#)

document binding

[Advanced properties](#)

[First steps](#)

document name (DocDes)

[Fields](#)

document processing PROXESS Xtract

[First steps](#)

[Login](#)

document type (DocsDocTypeName)

[Fields](#)

[PROXESS](#)

document types

[Digression: PROXESS updates](#)

[Login](#)

double-sided documents

[Scanner settings](#)

email notification (log)

[Settings menu](#)

enter barcode manually

[Document and barcode](#)

enter fixed value

[Field properties](#)

fields (properties)

[Fields](#)

file name (FileDes)

[Fields](#)

finding barcode retroactively

[Barcode recognition \(settings\)](#)

first steps

[First steps](#)

fixed page amount for document separation

[Document and barcode](#)

further processing by Xtract

[New profile](#)

image compression (color scan)

[Advanced properties](#)

import

[Document import](#)

[Xtract settings](#)

import and export scan profile

[Window area_New job](#)

import directory

[Advanced properties](#)

[Document import](#)

[Document import](#)

Import files

[Document import](#)

[Window area_New job](#)

import profile

[Menu of PROXESS Management Console](#)

index fields

[Digression: PROXESS updates](#)

[Login](#)

Indexierung

[Dokumentverwaltung.htm#Indexierung](#)

indexing

[About PROXESS Scan Client](#)

[Advanced properties](#)

[Fields](#)

[PROXESS](#)

[Transfer](#)

insert today's date

[Field properties](#)

installation directory

[Login](#)

intensive search for barcode

[Barcode recognition \(settings\)](#)

job

[First steps](#)

job directory

[Advanced properties](#)

job folder

[Advanced properties](#)

job number

[Xtract settings](#)

job prefix name

[Xtract settings](#)

key field

[PROXESS](#)

Keystroke combinations

[Keystroke combinations—shortcuts](#)

load job

[Window area_Open jobs](#)

Locally distribute scan profiles

[Locally distribute scan profiles](#)

log file

[Settings menu](#)

logical evaluation of barcode

[Barcode recognition \(settings\)](#)

login

[Digression: Profile management with SQL database](#)

[Digression: PROXESS updates](#)

[Login](#)

[Overview of the Scan Client start window](#)

login data

[Digression: Profile management with SQL database](#)

[Login](#)

login dialog

[Digression: Profile management with SQL database](#)

[Digression: PROXESS updates](#)

login mask

[Login](#)

login process

[Digression: PROXESS updates](#)

[Login](#)

magnifying glass

[Structure of the editing window](#)

main window of PROXESS Scan Link

[Window area_New job](#)

main window PROXESS Scan Link

[First steps](#)

[Login](#)

[Overview of the Scan Client start window](#)

manage profiles

[Digression: Profile management with SQL database](#)

[Distribute scan profiles via PROXESS Management Console](#)

[Export and import scan profiles \(via XML\)](#)

[Locally distribute scan profiles](#)

mandatory field

[Fields](#)

[PROXESS](#)

maximum distortion (barcode)

[Barcode recognition \(settings\)](#)

Menu PROXESS Management Console

[Menu of PROXESS Management Console](#)

meta data update

[Digression: PROXESS updates](#)

metadata update

[Login](#)

Metadata update

[PROXESS](#)

minimum resolution of scanned pages

[Advanced properties](#)

monitoring import folder

[Document import](#)

move images between documents

[Document management](#)

MS-SQL database

[Digression: Profile management with SQL database](#)

multipage document

[Document and barcode](#)

[Document management](#)

network connection

[Digression: PROXESS updates](#)

network protocol

[Login](#)

new creation of documents

[PROXESS](#)

new document

[Document management](#)

new job

[Window area_New job](#)

new profile

[New profile](#)

[Window area_New job](#)

offline archiving

[Document and barcode](#)

online/offline transfer

[New profile](#)

[Transfer](#)

open jobs

[Window area_Open jobs](#)

option "Without PROXESS"

[PROXESS](#)

option "Without Xtract"

[Xtract settings](#)

output path

[Transfer](#)

paper alignment

[Document import](#)

password

[FAQs](#)

[Login](#)

Password

[Digression: Profile management with SQL database](#)

preview scan

[Scanner settings](#)

processing step "Document management"

[Document management](#)

processing step "Transfer"

[Transfer to the archive](#)

processing window (scanning)

[Document import](#)

profile database

[Digression: Profile management with SQL database](#)

profile distribution

[Digression: Profile management with SQL database](#)

profile matching

[Digression: PROXESS updates](#)

[Login](#)

profile scan

[Document import](#)

profile settings

[Advanced properties](#)

[Document import](#)

[Fields](#)

[PROXESS](#)

[Transfer](#)

profiles

[Digression: Profile management with SQL database](#)

[Digression: PROXESS updates](#)

[Login](#)

PROXESS archive settings

[PROXESS](#)

PROXESS DMS

[Login](#)

PROXESS Index Miner

[Transfer to the archive](#)

PROXESS Management Console

[Digression: Profile management with SQL database](#)

[Distribute scan profiles via PROXESS Management Console](#)

[Menu of PROXESS Management Console](#)

PROXESS meta data

[Digression: PROXESS updates](#)

PROXESS query field

[Field properties](#)

PROXESS result field

[Field properties](#)

PROXESS Scan Link

[Digression: Profile management with SQL database](#)

[Digression: PROXESS updates](#)

PROXESS updates

[Digression: PROXESS updates](#)

[Login](#)

PROXESS Xtract

[Login](#)

[Xtract settings](#)

QR code

[Document and barcode](#)

[Field properties](#)

release job

[Document and barcode](#)

release job for archiving

[Transfer](#)

Release job for archiving

[Window area_Open jobs](#)

released job

[Transfer](#)

rename scan profile

[Window area_New job](#)

reset documents

[PROXESS](#)[PROXESS](#)

Retroactive barcode recognition

[Document management](#)

rotate images

[Document management](#)

save login information

[Login](#)

scan batch

[Document management](#)

scan job

[Advanced properties](#)[Document import](#)[New profile](#)[Settings menu](#)[Transfer](#)[Transfer to the archive](#)[Window area_New job](#)[Window area_Open jobs](#)

Scan Link profile

[Digression: Profile management with SQL database](#)

Scan Link profile data

[Digression: Profile management with SQL database](#)[Login](#)

Scan Link profile management

[Digression: Profile management with SQL database](#)

scan online

[Released jobs window section](#)

scan processing

[Document import](#)

scan profile

[Advanced properties](#)[Document import](#)[PROXESS](#)[Window area_New job](#)[Xtract settings](#)

Scan profile

[FAQs](#)[Fields](#)[First steps](#)[New profile](#)[Scanner settings](#)[Settings menu](#)[Transfer](#)

Scan profile names

[Digression: Scan profile names](#)

scan profiles

[Login](#)
scan stack
[Document and barcode](#)
ScanLink
[Digression: Profile management with SQL database](#)
scanner settings
[Document import](#)
[Scanner settings](#)
scanning process
[First steps](#)
scheduled transfer
[Transfer](#)
search barcode
[Barcode recognition \(settings\)](#)
select database
[New profile](#)
[PROXESS](#)
select scanner
[Document import](#)
[Scanner settings](#)
set barcode filter
[Document and barcode](#)
set document start
[Document management](#)
Show/hide login mask
[File menu](#)
single scan
[Document import](#)
split documents
[Document management](#)
split pages
[Document and barcode](#)
SQL database
[Digression: Profile management with SQL database](#)
[Login](#)
start window
[Login](#)
[New profile](#)
[Overview of the Scan Client start window](#)
storage of your login data
[Login](#)
store fixed input value
[Field properties](#)
subsequent division of documents
[Document and barcode](#)
system administrator
[Login](#)
terminal server capability
[Digression: Profile management with SQL database](#)
thesaurus list
[Field properties](#)
time
[Digression: PROXESS updates](#)
time-controlled archiving
[Transfer](#)
Time-controlled archiving
[About PROXESS Scan Client](#)
transfer
[About PROXESS Scan Client](#)

[Advanced properties](#)

[First steps](#)

[Login](#)

[New profile](#)

[PROXESS](#)

[Transfer](#)

[Transfer](#)

[Transfer to the archive](#)

[Xtract settings](#)

transfer directory (Xtract)

[Xtract settings](#)

transfer documents

[PROXESS](#)

[Transfer](#)

Transfer documents

[Transfer to the archive](#)

transfer file

[Transfer](#)

[Xtract settings](#)

Transfer options (Xtract)

[Xtract settings](#)

transfer profile to server

[Menu of PROXESS Management Console](#)

using network scanner

[Document import](#)

Xtract (automatic document recognition)

[Advanced properties](#)

[FAQs](#)

[Fields](#)

[Login](#)

[New profile](#)

[PROXESS](#)

[Transfer](#)

[Transfer to the archive](#)

[Xtract settings](#)

Xtract settings

[Xtract settings](#)

zone (barcode recognition)

[Structure of the editing window](#)

Zone profile

[Structure of the editing window](#)