



KGS Scan



KGS Scan

Version 2.3.07

User Manual

Last Update: June 2018

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Table of Contents

1. Description.....	4
2. Scanning.....	4
2.1 Scan Profiles	4
2.1.1 Scanning a Page	4
2.1.1.1 Via drag & drop	6
2.1.1.2 Via the shortcut menu	6
2.1.1.3 Via the global 'Open File' dialog	7
2.1.2 Entering Index Values	8
3. Shortcut Menus.....	9
3.1 'Shortcut Menu 'Thumbnail Preview'	9
3.1.1 Add Page (s).....	10
3.1.2 Delete Page (s).....	10
3.1.3 Re-scan Page.....	10
3.1.4 Move Pages to new Document.....	10
3.1.5 Resort Pages.....	10
3.1.6 E-Mail	10
3.1.7 Print Page (s)	12
3.1.8 Post Processing	12
3.1.9 Properties	12
3.2 Shortcut Menu 'Document Preview'.....	13
3.2.1 Export	13
3.2.2 Delete Dokument Seperation	14
3.2.3 Email selected Document (s).....	14
3.2.4 Delete Blank Page (s).....	14
3.2.5 Print selected Documents	14
3.2.6 Save Document(s).....	14
3.3 Shortcut Menu 'Page Preview'.....	14
3.3.1 Rotate/Flip	15
3.3.2 Scrollbars	15
3.3.3 Copy to Clipboard.....	15
3.3.4 Zoom	15
3.3.5 Mouse Mode.....	16
3.3.6 Viewer Quality	16
4. Interface and Customizations	16

4.1	Toolbar	16
4.1.1	Start.....	17
4.1.2	View.....	17
4.1.3	Edit	17
4.1.4	Window.....	17
4.1.5	About.....	17
4.1.6	Loading Files from Disk.....	18
4.2	Function Keys.....	18
4.2.1	Scan All	18
4.2.2	Scan Page.....	18
4.2.3	Delete All	18
4.2.4	Rescan Page.....	18
4.2.5	Export.....	18
4.2.6	Zoom In	19
4.2.7	Dropdown Selection	19
4.2.8	Zoom Out	19
4.2.9	Rotate/Flip	19
4.3	Status Bar.....	19
5.	Global Settings	20
5.1	Open File.....	20
5.2	Save Session.....	20
5.3	Load Session.....	20
5.4	Options	20
5.4.1	General.....	21
5.4.1.1	Saving the Work Status when Exiting the Program	21
5.4.1.2	Save Indexframe State when Exiting the Program	21
5.4.2	Language	21
5.4.3	SAP	21
5.4.4	GUI Customizing	22
5.5	Global Shortcut Keys.....	23
6.	Windows and Docking Panels	23
7.	Window Description	26
7.1	Thumbnail Preview	26
7.2	Profile Info	26
7.3	Barcode Table	27
7.4	Profile Info Extended	27
7.5	Reset the Layout.....	28

1. Description

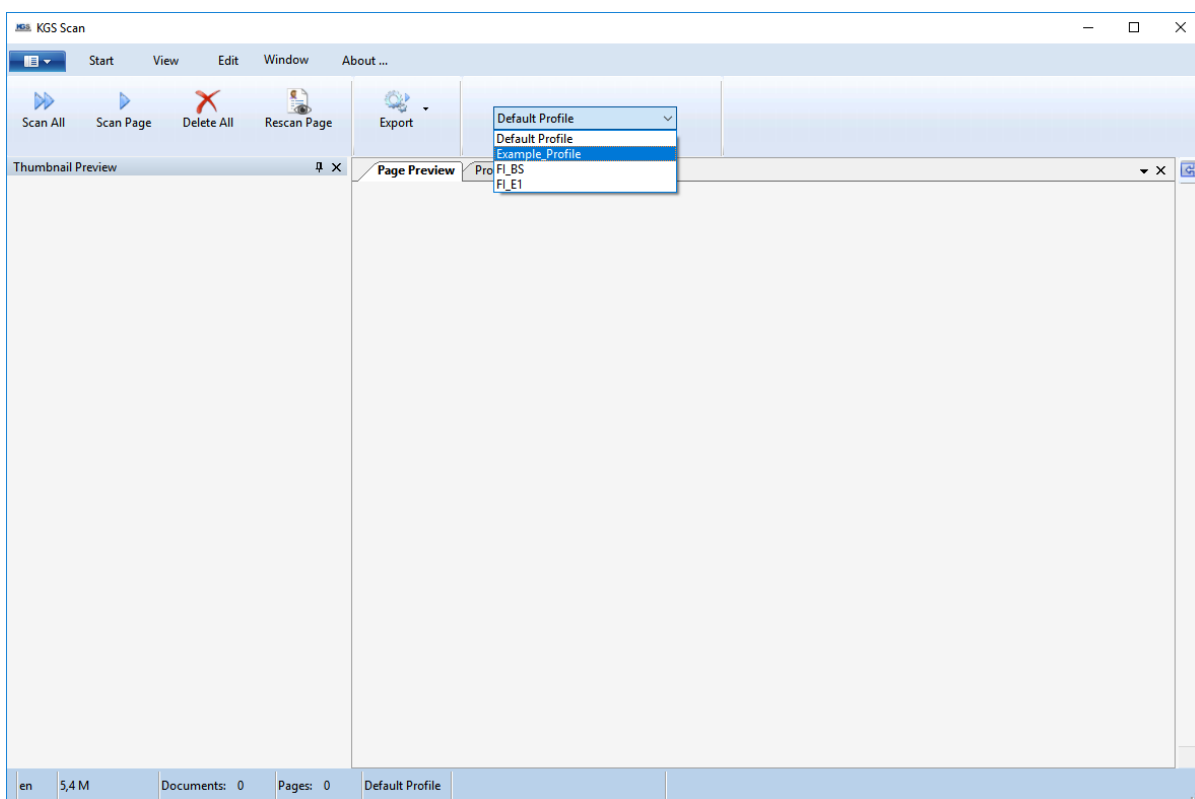
KGS Scan is a robust scan client that can be controlled directly in SAP to implement various storage scenarios. KGS Scan supports 'early archiving' and 'late archiving' in SAP. It also seamlessly integrates with the KGS ZADOC and KGS ScanServer products.

2. Scanning

2.1 Scan Profiles

There are various configuration parameters you can use to make the program's behavior and the results of scan procedures meet the specific needs of your scanning workstation. For easy management of these parameters, you can combine and store them in scan profiles. This enables you, for example, to specify the scanner to be used, how documents to be scanned will be processed, and how barcode recognition will be performed.

If multiple scenarios have been configured, select the desired profile before scanning.



2.1.1 Scanning a Page

Depending on the selected profile, you can scan pages on a physical scanner or from the file system. When scanning via a physical scanner, place the documents into the feeder and press 'Scan All' to scan all pages:



If you want to scan individual pages, use the 'Scan Page' option:

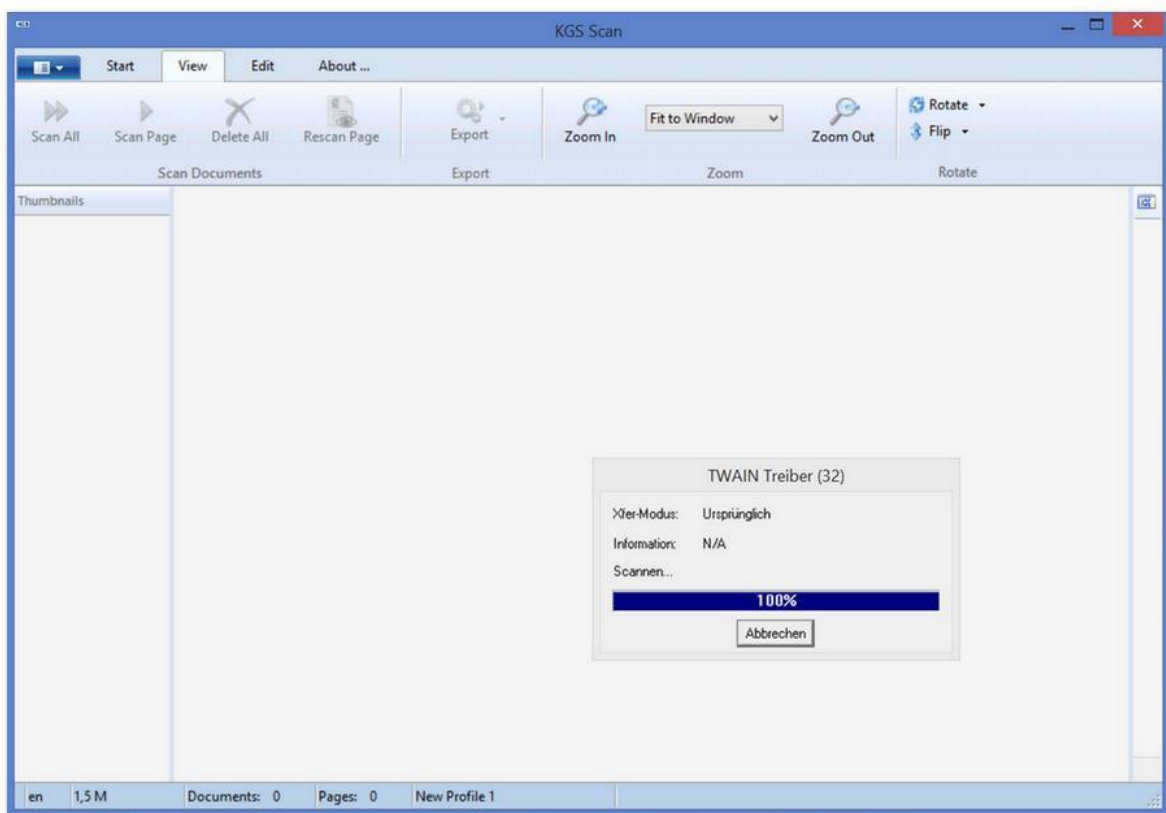


Note: Only a select few scanners equipped with a roller-based feeding system can scan single pages without immediately feeding part of the following page. Therefore, when using such a scanner, it is likely that part of the second page will also be fed. It is not possible to turn off this scanner behavior from the software side.

Depending on the configuration, you will either be requested to specify the scan folder (if you are about to scan documents directly from the file system) or scanning will start automatically. The specific behavior depends on the settings chosen by the profile administrator during system configuration.

Note: The name applied to a document (e.g. 'Document_0001_...') also depends on previously made profile settings.

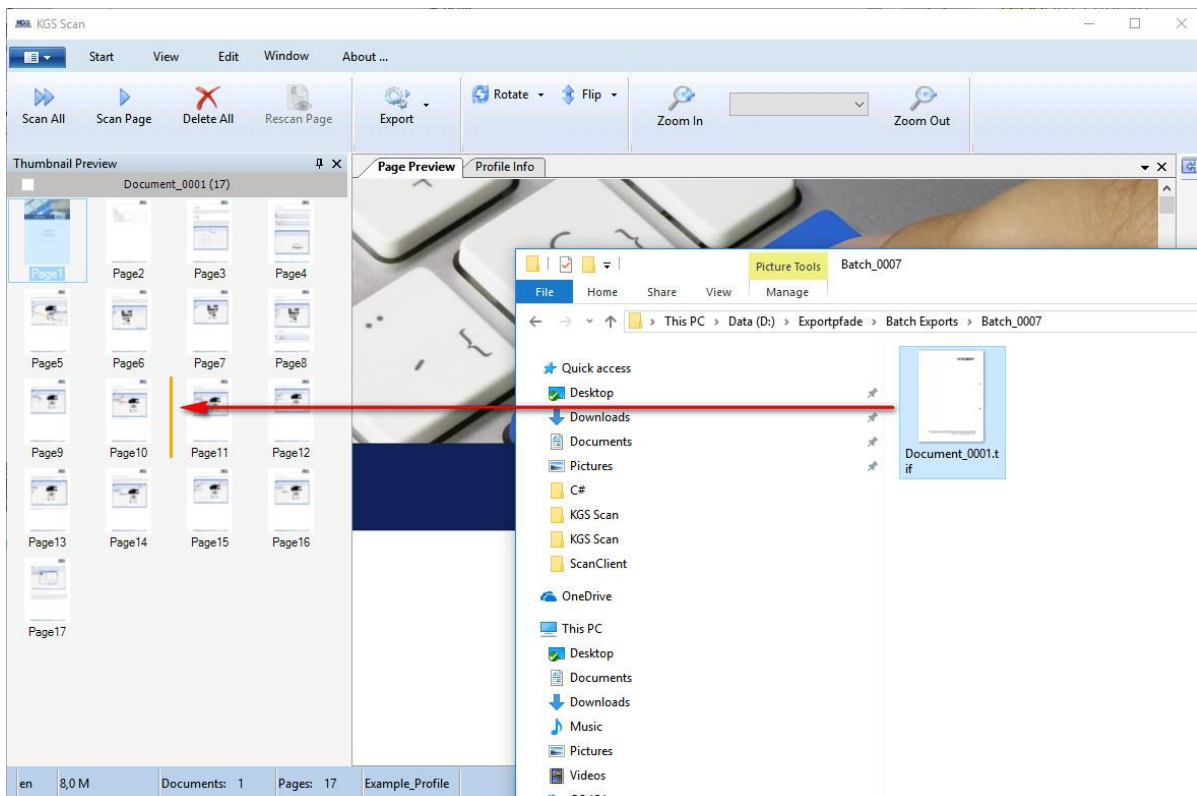
The processing time is mainly determined by the configured image processing options and the number of pages to be scanned.



You can manually add pages to previously scanned documents. There are three ways to do so:

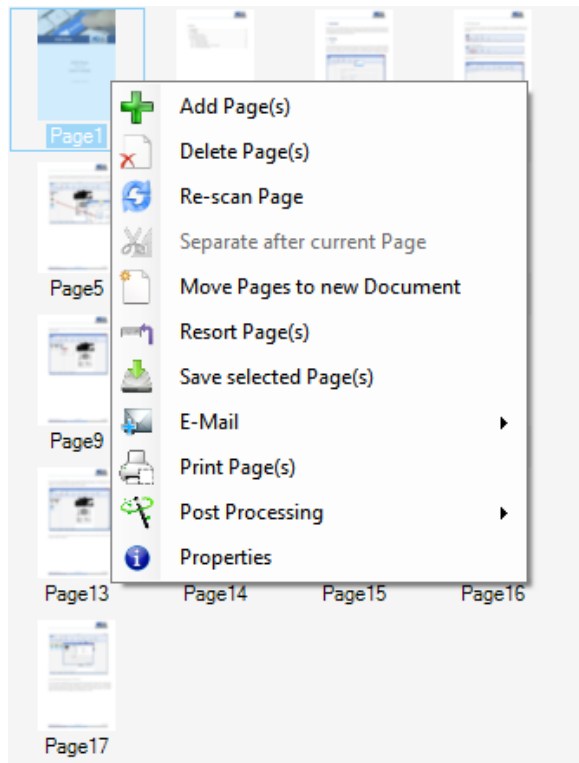
2.1.1.1 Via drag & drop

If you want to import a TIFF file, you can drag & drop the pages of this document to any location on a previously scanned document. Simply drag the document to the desired place



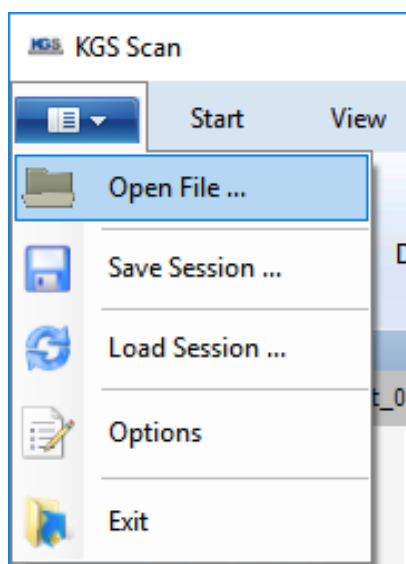
2.1.1.2 Via the shortcut menu

If you want to add pages to a previously scanned document from a location outside your file system (or in a format other than TIFF), use the shortcut menu. Select a page after which you want to attach the newly scanned pages. First, right-click the respective page.



Now select the 'Add Page(s)' option. The scanner defined in the profile will be used. If there are multiple pages in the scanner feeder, all pages will be attached to the selected page. For more information on the shortcut menu, read section 3. Shortcut Menus.

2.1.1.3 Via the global 'Open File' dialog



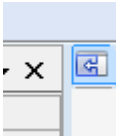
This allows you to attach a PDF or TIFF document from the file system to the previously scanned batch. A file selection dialog is called up. Select the file you want to import.

Note: The pages will be attached to the last page of the document.

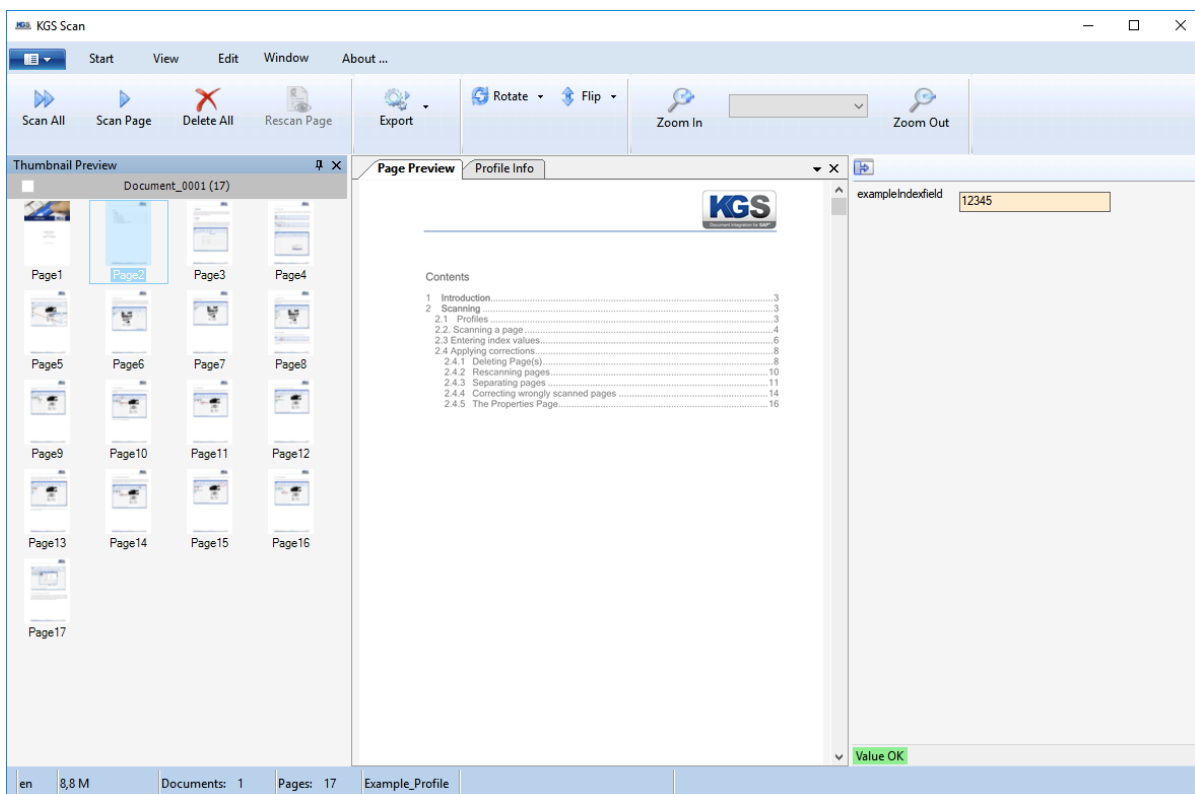
You can then change the order of the pages using drag & drop.

2.1.2 Entering Index Values

If your scan profile contains configured index fields (for instance for the 'late archiving with barcode' SAP scenario), an extra window will be shown on the right side of the panel during export. You can use the arrow button



to expand or collapse it (if there are index fields). If the system is configured to require manual confirmation of index values before exporting (this can be set in the profile), the window will expand automatically. Use the Enter key to confirm the visible index values.

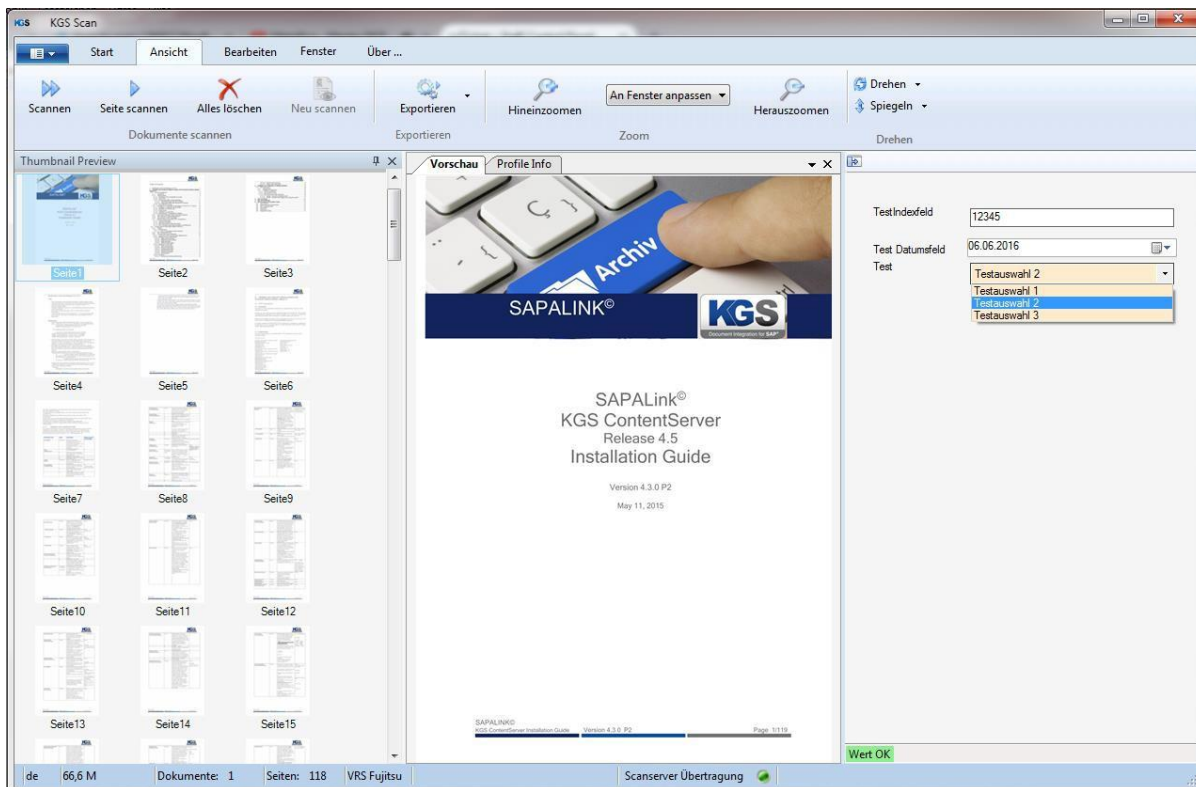


In addition to the 'Conformation required' option, the field properties

- Invisible,
- Just Read or
- Allow Blank Value

may have been configured in the profile.

Besides normal text, the profile administrator can also configure selection lists and date indications.



In this example, three visible index fields have been defined. The 'Value OK' status indicates that the currently selected index field contains a valid entry.

3. Shortcut Menus

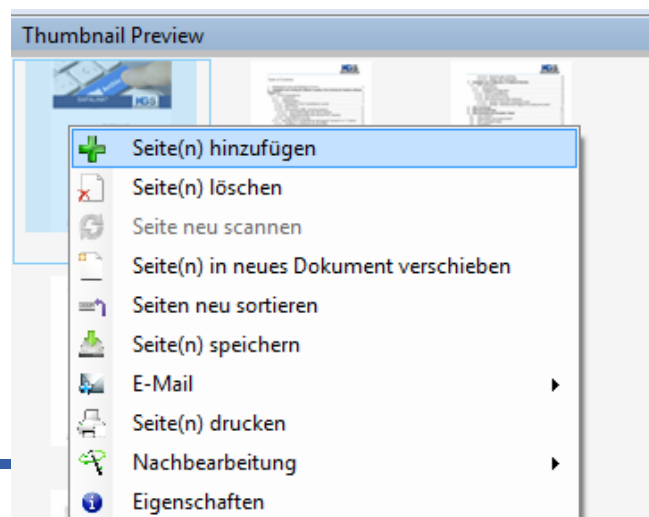
The shortcut menus were overhauled in Version 1.40, and several items were added. In general, there are three different types of shortcut menus.

3.1 'Shortcut Menu 'Thumbnail Preview''

The 'Thumbnail Preview' shortcut menu currently contains ten options and can be accessed by right-clicking any page in the thumbnail preview.

If you want to select multiple pages, press and hold the CTRL key while selecting pages or by capturing the desired pages in a frame.

1. Add Page(s)
2. Delete Page(s)
3. Re-scan Page
4. Move Pages to new Document
5. Resort Page(s)
6. Save selected Page(s)
7. E-Mail
8. Print Page(s)
9. Post Processing



10. Properties

3.1.1 Add Page (s)

Refer to section 2.1.1 Scanning a Page - Via the shortcut menu.

3.1.2 Delete Page (s)

The selected pages are deleted without prompting and are removed from the preview.

3.1.3 Re-scan Page

Unless you are scanning from hard disk, you can rescan pages. The chosen page is rescanned, and the result replaces the previous preview image. If you are importing from the file system (using the File Importer), this item will be grayed out (see image).

3.1.4 Move Pages to new Document

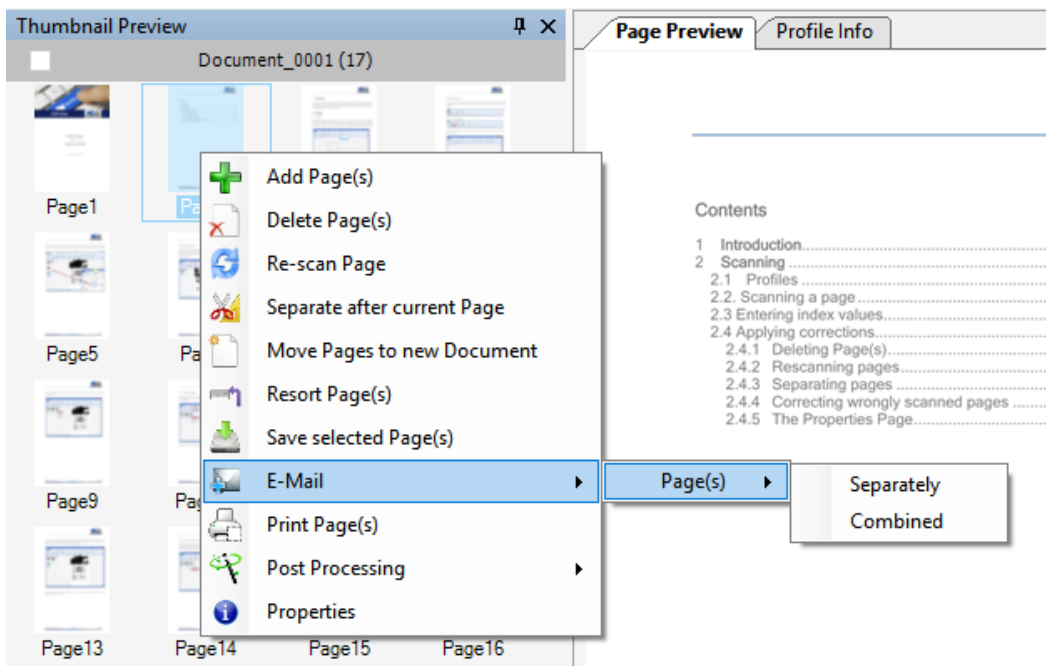
If multiple pages were scanned, all marked pages are moved into a new document. This procedure allows you to manually enforce a document separation.

3.1.5 Resort Pages

When you select this option, you will be prompted to enter an integer value in a separate dialog. If the entered number is valid, KGS Scan will sort all scanned pages according to the number of pages indicated.

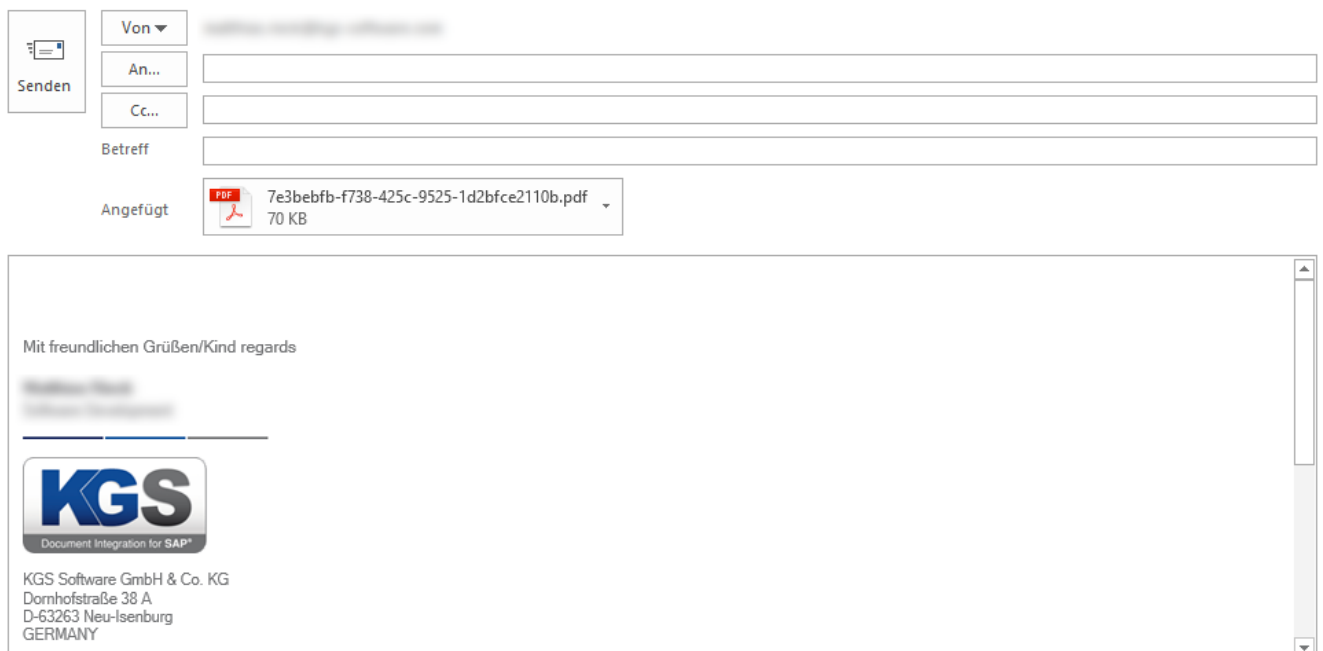
Note: As this option also affects index fields, document generation and other factors, processing may take a while depending on the number of pages/documents involved. We therefore recommend you only use this option for scenarios you cannot structure in any other way.

3.1.6 E-Mail



KGS Scan supports e-mail integration with Outlook and Lotus Notes. If one of these programs is installed locally, you can send selected pages via e-mail. Here, you can choose to mail them as several single-page PDFs or one multi-page PDF. So in this example, either three one-page PDF documents or a single 3-page PDF document will be attached to the e-mail.

KGS Scan generates the file names, which cannot be changed.



Note: You may need to adjust the sender address in the 'FROM' address field since third-party programs (in this case KGS Scan) might not be permitted to access local Outlook or Lotus Notes accounts for security reasons.

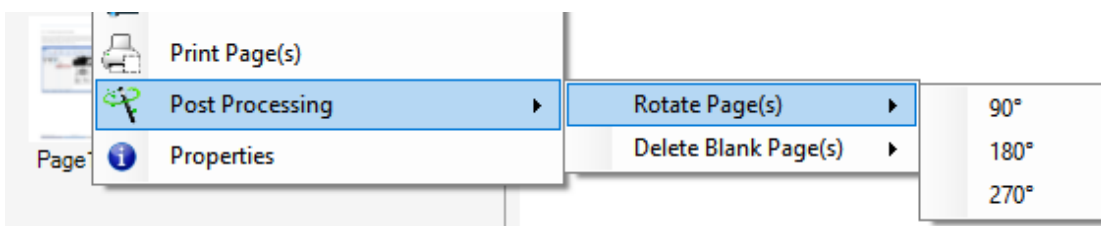
3.1.7 Print Page (s)

Use this menu item to print selected pages before exporting them.

3.1.8 Post Processing

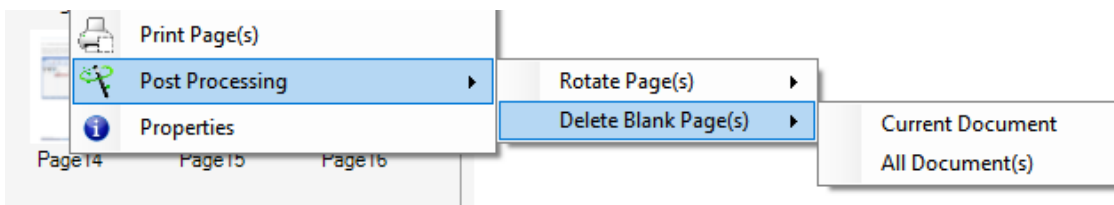
This shortcut menu item has two submenus:

- Rotate Page(s)



Use 'Rotate page (s)' to rotate pages in the main or thumbnail preview.

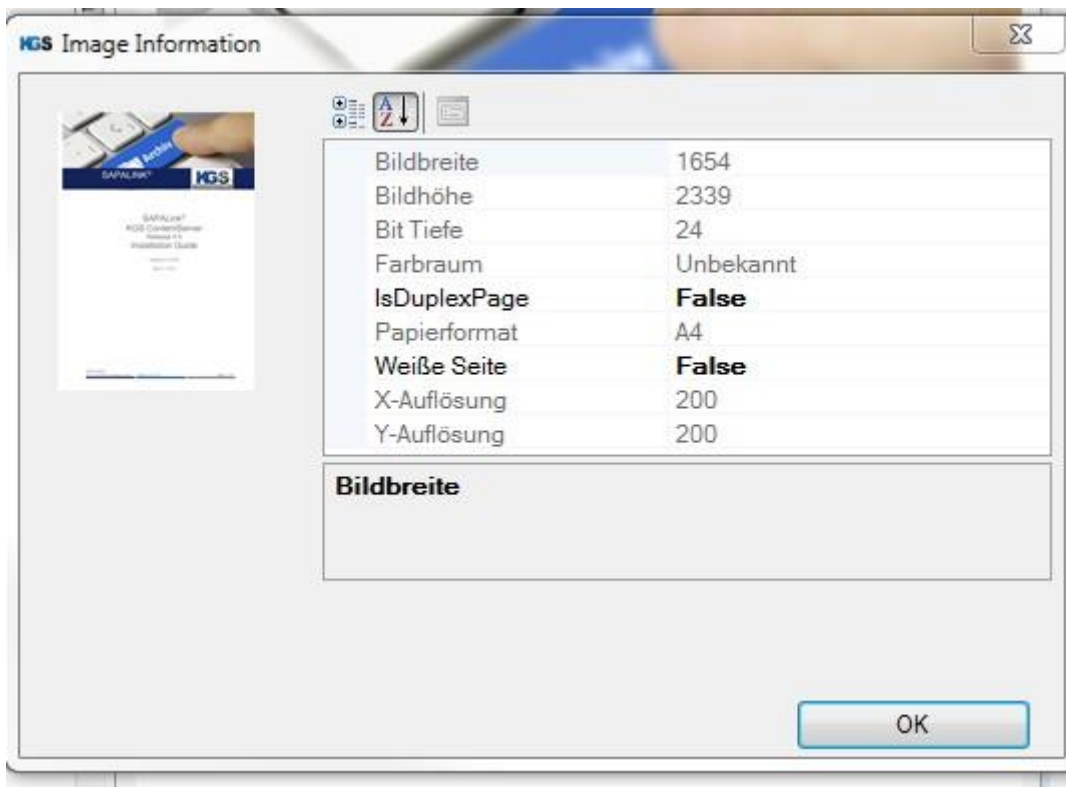
- Delete Blank Pages (s)



This menu item allows you to search the current document (that contains the selected page) or all documents for empty pages and remove them.

3.1.9 Properties

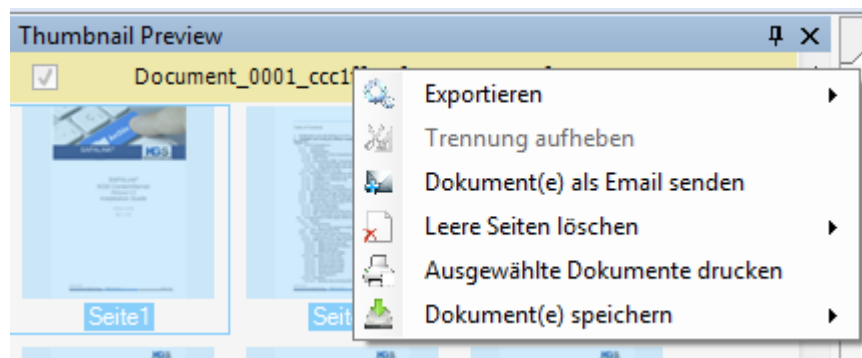
When you choose this menu item, the program lists all key properties of the selected page. Example:



3.2 Shortcut Menu 'Document Preview'

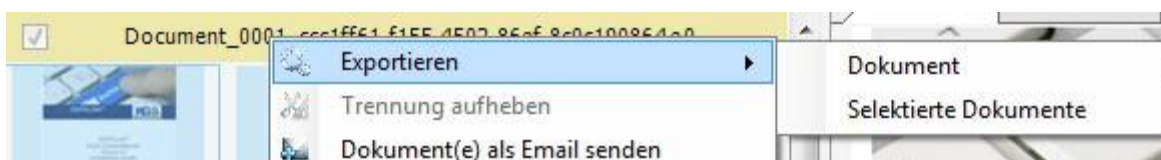
The 'Thumbnail Preview' shortcut menu currently contains six options and can be accessed by right-clicking any page or combination of pages in the thumbnail preview.

1. Export
2. Delete Dokument Separation
3. Email selected Document (s)
4. Delete Blank Page (s)
5. Print selected Document(s)
6. Save Document(s)



3.2.1 Export

This selection menu enables you to export the current document (just the one you right-clicked) or all selected documents



3.2.2 Delete Dokument Separation

If you have selected multiple documents, you can use the 'Delete Dokument Separation' menu item to merge the selected documents.

3.2.3 Email selected Document (s)

If Microsoft Outlook or Lotus Notes is installed on the workstation, this option will cause the corresponding program to launch while displaying the note "Compose new message" on screen. The attachment of the new mail contains the selected documents in PDF format.

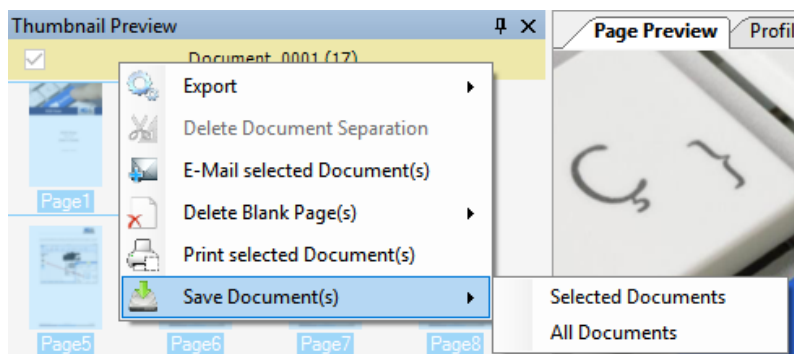
3.2.4 Delete Blank Page (s)

Refer to section 3.1.8 Post Processing

3.2.5 Print selected Documents

After selecting this menu item, every page of each selected document will be printed.

3.2.6 Save Document(s)



This option allows you to locally store the selected documents before starting the export. You can choose the storage location via a 'Save as' dialog.

3.3 Shortcut Menu 'Page Preview'

The main view ('Page Preview' tab) shows the currently selected page. Right-click to open the corresponding shortcut menu, which provides six options:

1. Rotate/Flip
2. Scrollbars
3. Copy to Clipboard

- 4. Zoom
- 5. Mouse Mode
- 6. Viewer Quality

3.3.1 Rotate/Flip

This option allows you to rotate or mirror the page.

3.3.2 Scrollbars

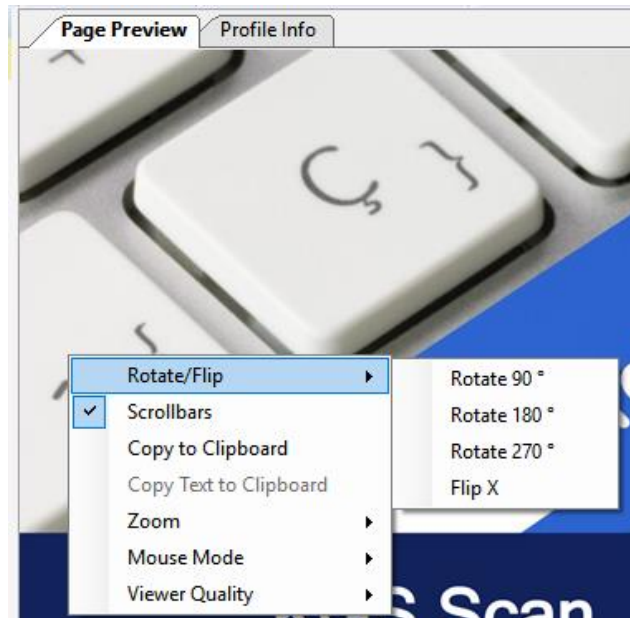
If this checkbox is disabled, no scroll bars will be shown; i.e., you need to use the mouse wheel to perform zoom operations.

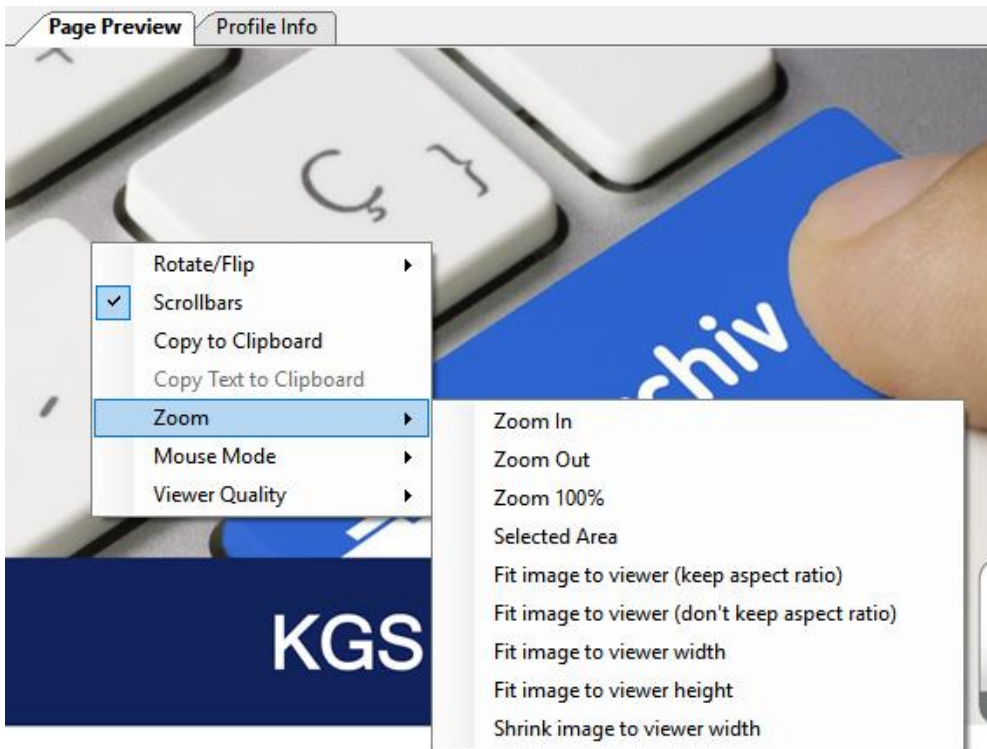
3.3.3 Copy to Clipboard

Use this option to save the current page to the clipboard and insert it (e.g. in Microsoft Word or Outlook) somewhere external to KGS Scan.

3.3.4 Zoom

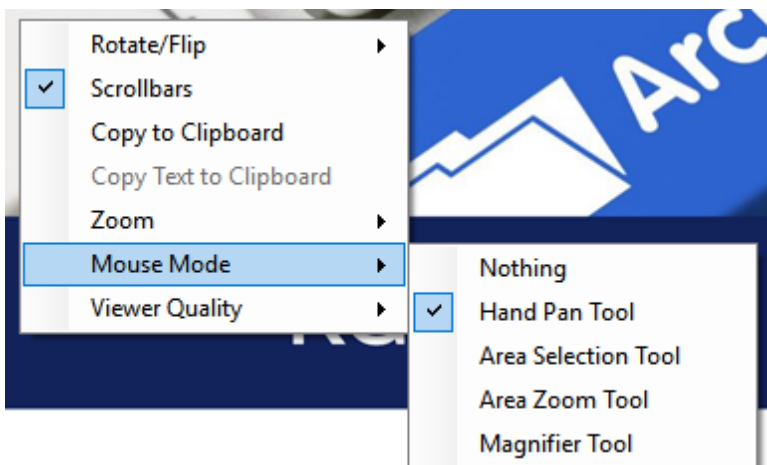
Use this menu item to change the zoom factor of the display. As an alternative, you can perform the same action using the mouse wheel or the toolbar.





3.3.5 Mouse Mode

The selection menu enables you to change how the area around the mouse pointer is displayed.



3.3.6 Viewer Quality

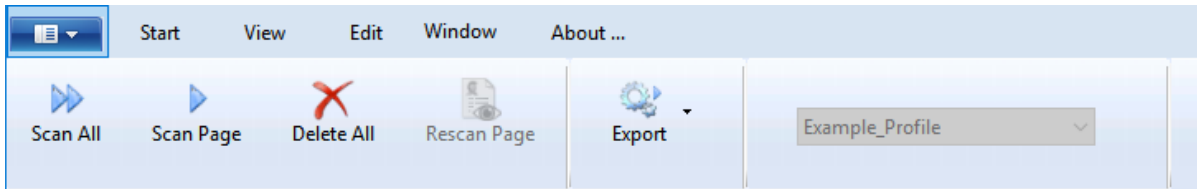
This menu provides options for controlling the visual quality.

4. Interface and Customizations

4.1 Toolbar

The toolbar includes all key functions. The contents change depending on the active tab and scan state.

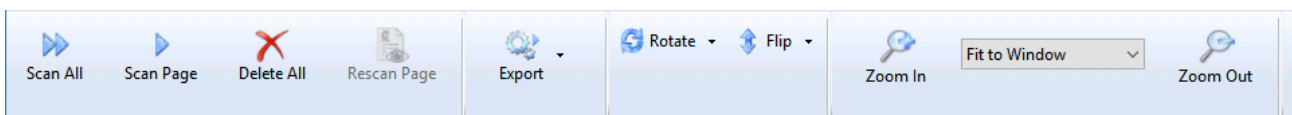
4.1.1 Start



The Start tab provides all basic functions and allows you to change the profile as long as you have not yet commenced scanning.

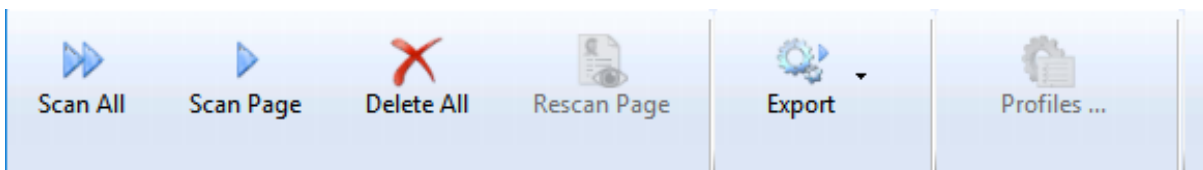
4.1.2 View

During scanning, the program automatically opens the 'View' tab.



4.1.3 Edit

This is where profile administrators can create and modify profiles as long as no scan process has been performed. Else, this item is grayed out.

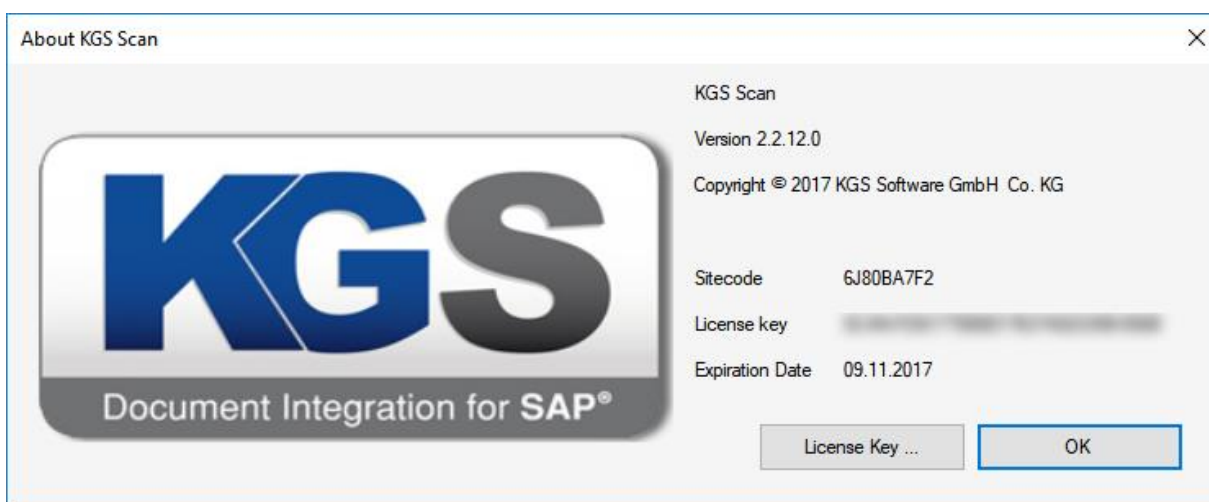


4.1.4 Window

Please refer to section 6 Windows and Docking Panels.

4.1.5 About

This tab provides an overview of key information about the program. This includes, in particular, licensing management data required by IT administrators.



4.1.6 Loading Files from Disk

If a profile administrator configured the 'FileImporter' profile or some other parameters (see the KGS Scan installation and configuration manual), the way the other profiles are displayed may differ (depending on the combination of defined parameters).

4.2 Function Keys

4.2.1 Scan All

Refer to section 2.1.1 Scanning a Page.

4.2.2 Scan Page

Refer to section 2.1.1 Scanning a Page.

4.2.3 Delete All

If you click this button, all previously scanned documents are deleted, and the preview and main panel are cleared. Now the system is ready to perform a completely new scan.

If you already exported individual documents, now the batch is released for downstream processing by other programs or services such as KGS Scan Transfer.

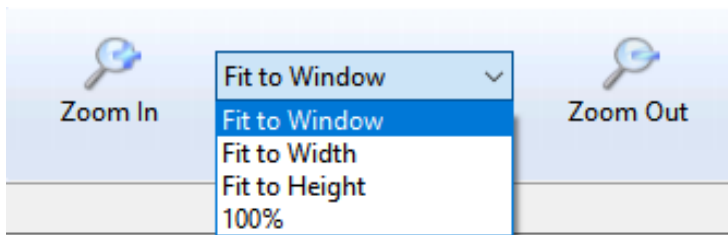
4.2.4 Rescan Page

Unless you are scanning from hard disk, you can rescan pages. The chosen page is rescanned, and the result replaces the previous preview image. If you are importing files from hard disk (using the File Importer), this item is grayed out.

4.2.5 Export

This selection menu allows you to export all documents or selected ones.

4.2.6 Zoom In



Zooms to the next higher level on the current page.

4.2.7 Dropdown Selection

Provides predefined zoom options.

4.2.8 Zoom Out

Zooms to the next lower level on the current page.

4.2.9 Rotate/Flip

This option allows you to rotate or mirror the preview page.



4.3 Status Bar

The status bar is located at the bottom of the KGS Scan interface panel.



The first field ('de' in this screenshot) shows the current language. You can change it in the Options -> Language menu.

For more information on this topic, see section 5.1.2 Language.

The second field displays the memory load (in megabytes) of the currently used thread. The fourth column indicates the number of documents scanned so far. The next column shows the number of pages scanned up to now.

The sixth column shows the name of the profile currently in use.

The seventh column indicates the current status to alert you to issues or provide information (for example, 'duplicate barcode' or the status 'waiting for SAP user interaction').

If a scan server has been configured in the scan profile as the export target, the eighth column displays the status of the transfer folder in C:\ProgramData\KGS Scan\Transfer.

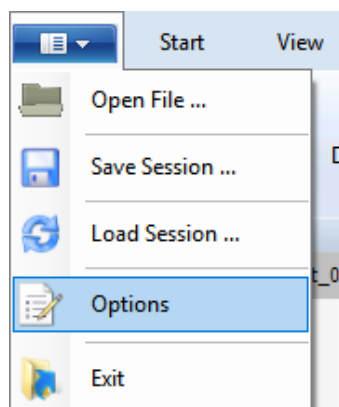
If the LED is green, there are no documents in this folder; i.e., previously exported documents were properly picked up by the KGS Scan transfer service and transferred to the scan server.

If the LED is yellow, there are still documents in the transfer folder. In this case, please contact your system administrator.

5. Global Settings

KGS Scan offers several options for defining individual settings that apply to the local workstation. These local settings are stored, so they will be available every time the program is started.

Click the blue drop-down button to perform this action.



5.1 Open File

See the global dialog "Open file".

5.2 Save Session

If documents were already scanned, this button becomes active. It allows you to export the current status (scanned documents, index fields etc.). The generated ZIP file contains all data required to restore a so-called session (work status).

5.3 Load Session

If there is a stored work status, you can use the 'Load Session' option to restore saved sessions. This is only possible if all current documents were processed/exported.

5.4 Options

This item provides global options.

The global settings comprise four menu items that are explained below.

5.4.1 General

The General section provides system administrators with options for configuring an optional scan server. For more detailed information on this topic, please refer to the 'KGS Scan Server Installation and Configuration Manual'.

The 'Session Handing' option allows you to decide how the system behaves when the KGS Scan session ends. By default, the 'Save Working State' checkbox is enabled. This means that all documents that have not yet been processed when KGS Scan is closed will be saved locally. Locally stored documents are automatically loaded the next time you launch KGS Scan. When doing so, the program will account for any existing profile groups. If you remove the checkmark, documents not yet processed will be ignored next time the program is started.

5.4.1.1 Saving the Work Status when Exiting the Program

By default, the 'Save Working State' checkbox is enabled. This means that all documents that have not yet been processed when KGS Scan is closed will be saved locally. Locally stored documents are automatically loaded the next time you launch KGS Scan. When doing so, the program will account for any existing profile groups. If you remove the checkmark, documents not yet processed will be ignored next time the program is started.

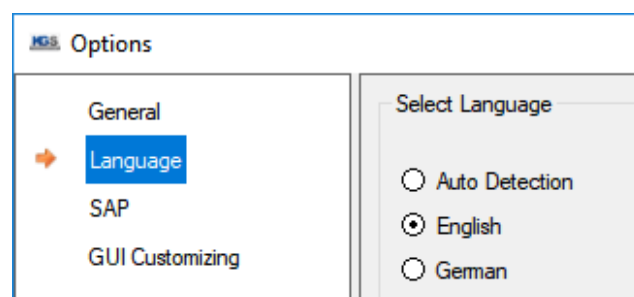
5.4.1.2 Save Indexframe State when Exiting the Program

The 'Save Indexframe State when Exiting the Program' checkbox is unchecked by default. If you check it, the status of the index panel (closed or open) will be restored when starting KGS Scan. If, for example, the panel was open when you quit the application, it will be open the next time you launch the program again.

5.4.2 Language

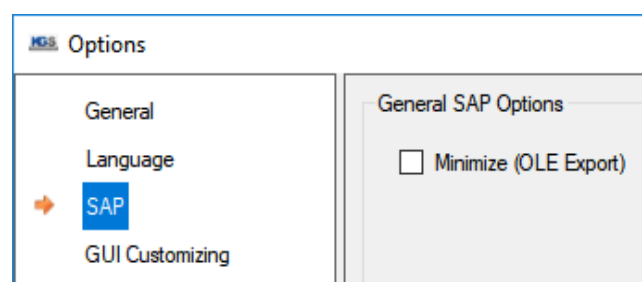
At present, KGS Scan supports German and English. If you enable 'Auto Detection', the language defined on the operating system level will be adopted.

The language setting affects both the interface and the configurations.



5.4.3 SAP

This configuration section currently only provides a single configuration item: 'Minimize (OLE Export)'.



If you enable the checkbox, the KGS Scan window is minimized after a successful SAP OLE export.

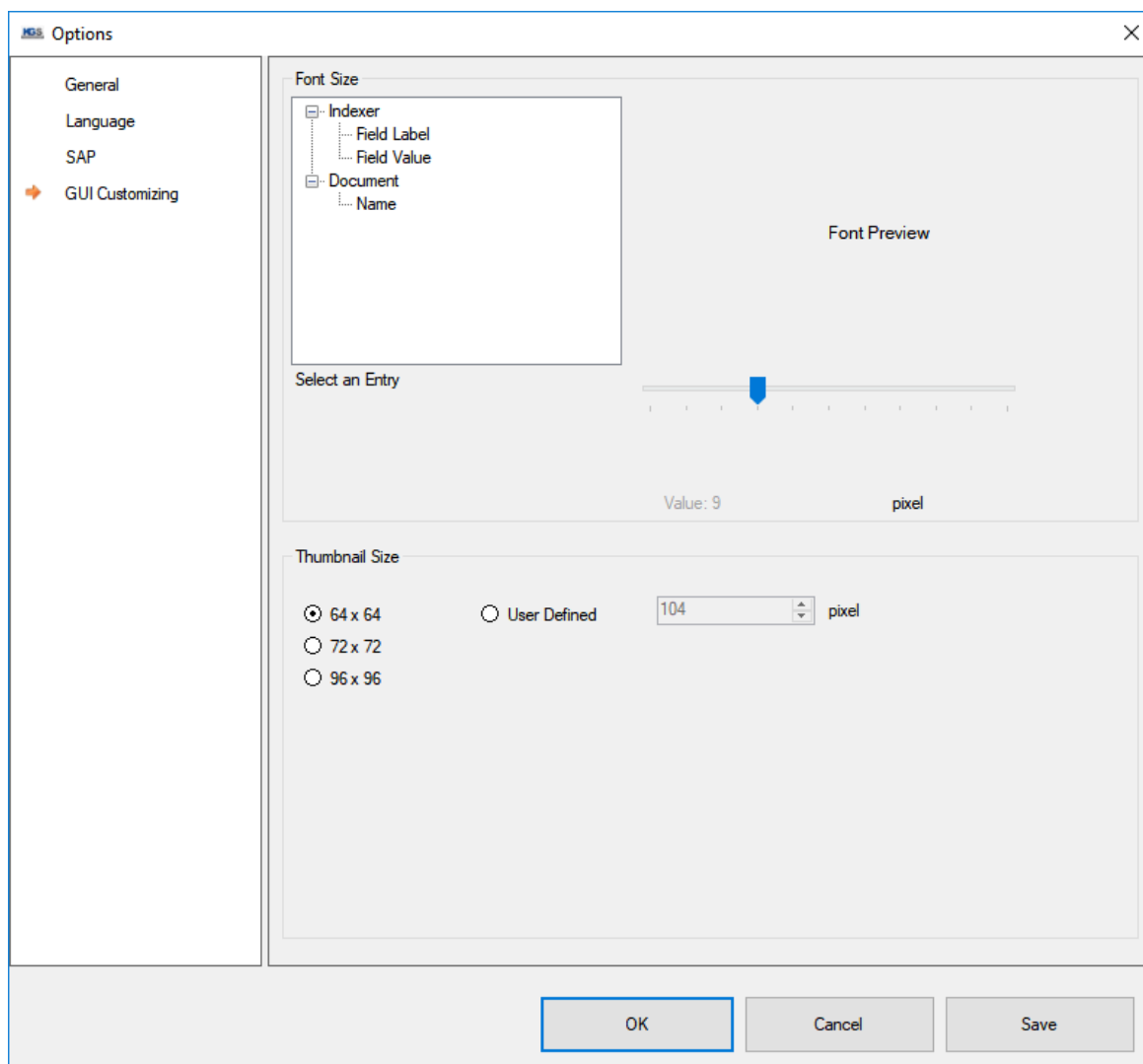
5.4.4 GUI Customizing

The ' GUI Customizing' section enables you to change various font sizes as well as the size of thumbnail preview images.

You can presently change the following font sizes:

- Index field name (field label)
- Index field value (value box)
- Document name

Expand the corresponding category in the tree view, select the field whose font size you want to change, and use the slider below to make the adjustment. Changes are applied instantly. Once you are done, save the changes.



In order to change the size of the thumbnail images, either select one of the three predefined values (64x64, 72x72 or 96x96) or specify a custom value under 'User Defined'.

Note: KGS Scan will calculate the height and width in relation to the scanned document. As a result, for instance when viewing an A4 page at the selected thumbnail size of 64x64 pixels, the dimensions actually shown are $(64+1.4) \times 64$ pixels = 45 x 64 pixels.

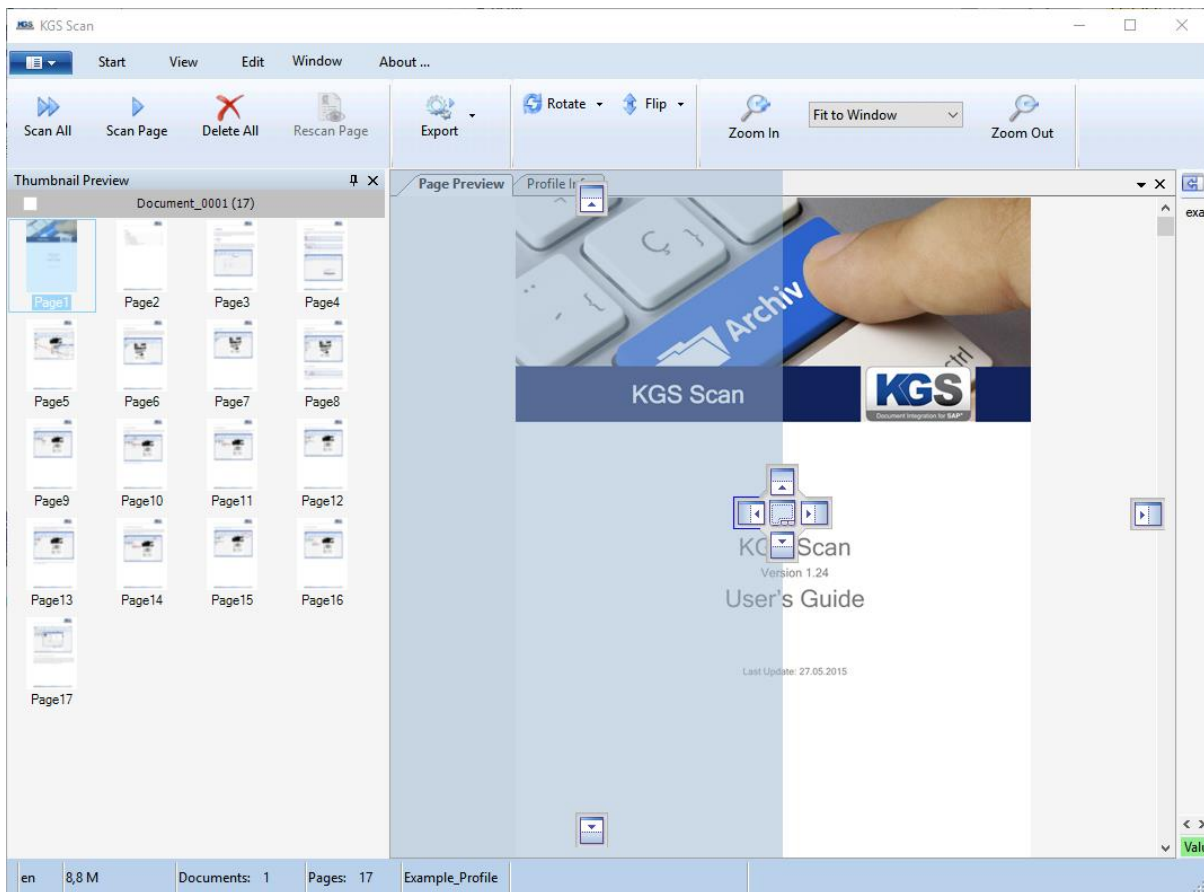
5.5 Global Shortcut Keys

Function keys and shortcut keys allow you to quickly perform routine actions. The following shortcut keys are available:

- | | |
|----------------------------------|---|
| • Left | Move to the left (thumbnail preview) |
| • Right | Move to the right (thumbnail preview) |
| • Up | Move up (thumbnail preview) |
| • Down | Move down (thumbnail preview) |
| • Del | Delete page |
| • Page up | Go to the first page of the previous document |
| • Page down | Go to the first page of the next document |
| • Home | Go to the first page of the first document |
| • End | Go to the first page of the last document |
| • F6 | Export current document |
| • F7 | Export selected documents |
| • F8 | Export all documents |
| • F9 | Start scanning (all pages) |
| • F10 | Start scanning (single page) |
| • F11 | Remove all pages |
| • F12 | Rescan selected page |
| • CTRL + A | Select/Deselect all pages |
| • CTRL (hold) + Click (page) | Add page to selection |
| • CTRL + M | Move selected pages to a new document |
| • CTRL (hold) + Click (document) | Add document to selection |
| • CTRL + C | Add page to the Windows clipboard |
| • CTRL + V | Paste page from the Windows clipboard |

6. Windows and Docking Panels

KGS Scan can swap out individual window sections. This feature is implemented using a so-called docking panel. If you want to rearrange certain windows, click and hold, for instance, the 'View' tab and pull the tab to any other location.



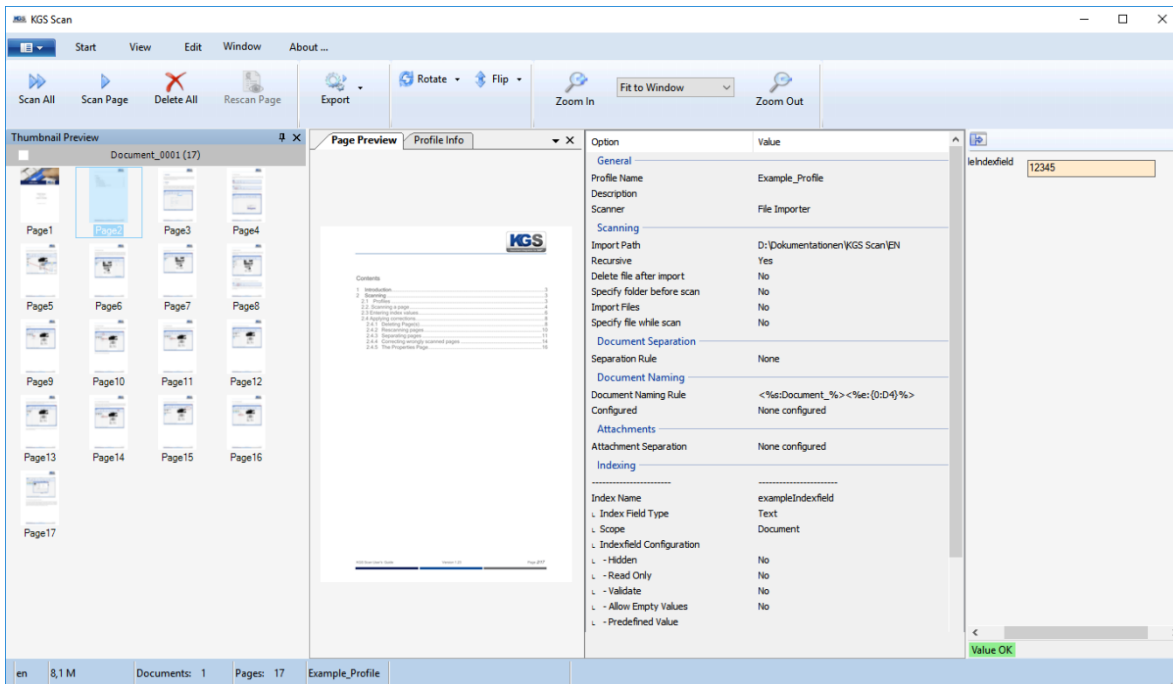
Now you should be seeing blue docking areas. Release the window in one of these blue areas. A light blue preview will show you what the current arrangement will look like if applied. You can manipulate the following window elements using this feature:

- Thumbnail preview
- Profile information
- Preview
- Extended profile info
- Barcode table (for duplicate alerts)

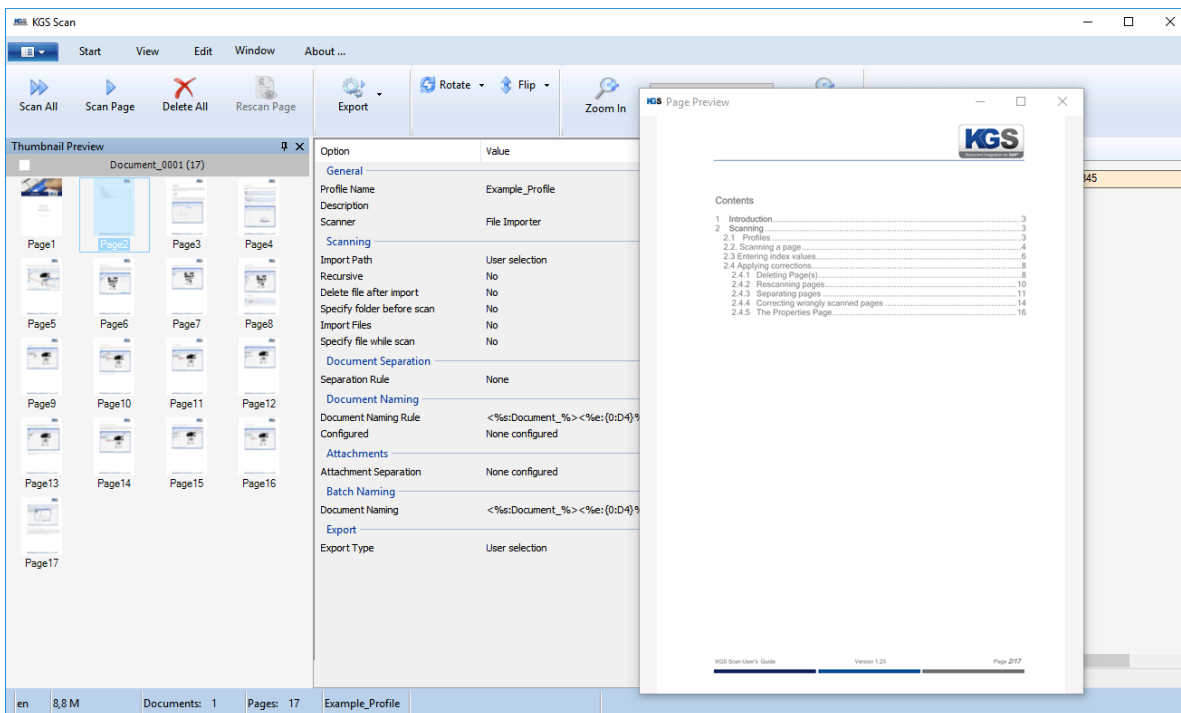
You cannot dock the indexer, toolbar or the status bar.

Note: You can apply the same method to swap out window sections to a second screen (for example in full-screen mode).

Here are some examples:

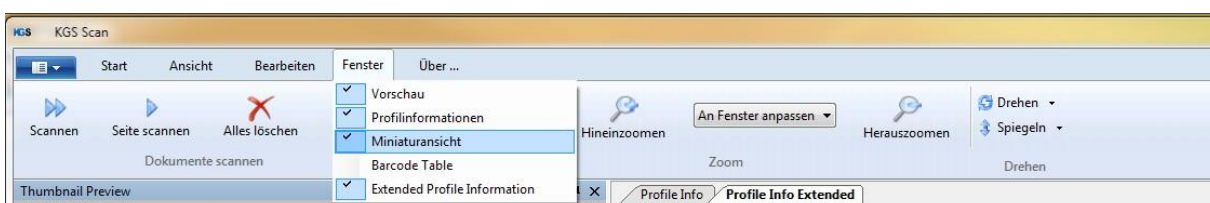


... or, when swapped out:



You can generally rearrange all elements listed above.

Use the 'Window' tab to individually enable or disable the different window sections



As an alternative, use the 'x' button at the top right of the window to disable a window.

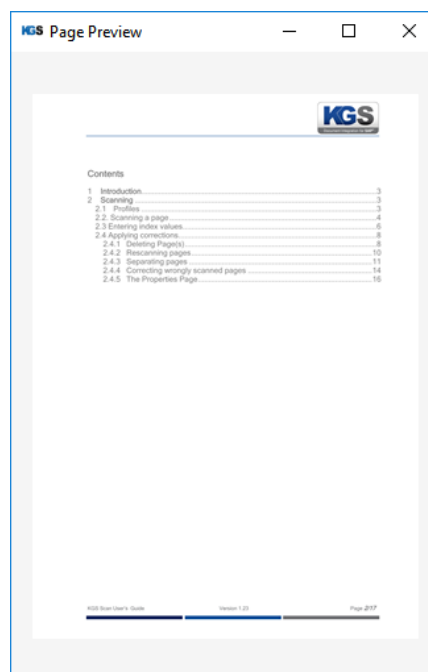
Note: 'Barcode Table' is only shown if barcode processing has been configured for the corresponding profile. This section alerts users to duplicate barcodes and highlights duplicate codes in the same color.

7. Window Description

Preview:

The preview window fully displays the page selected in the thumbnail preview. Depending on the zoom level, there will be vertical and/or horizontal scroll bars for moving the visible area of the page.

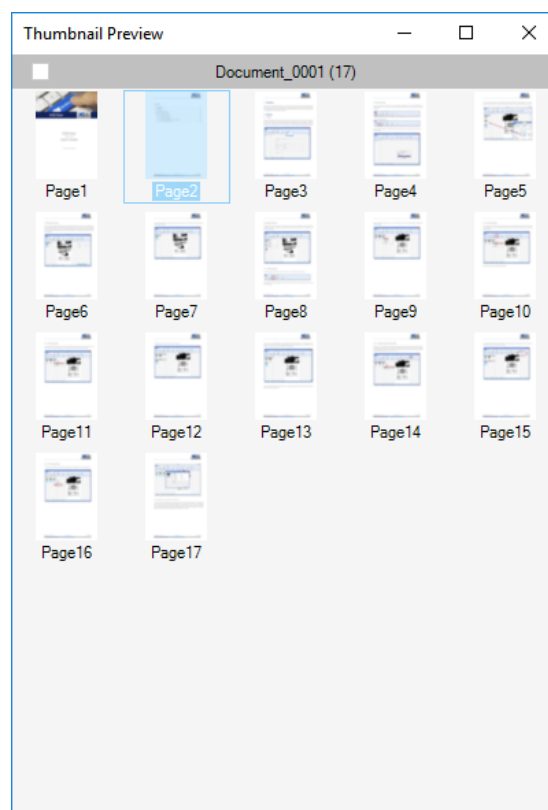
Further options are detailed in section 3.3 Shortcut Menu.



7.1 Thumbnail Preview

The thumbnail preview provides an overview of all scanned documents.

In addition to supporting standard drag & drop operations, it also has a shortcut menu. For more information on this type of menu, please refer to 3.1 'Thumbnail Preview' Shortcut Menu and 3.2 Shortcut Menu.



7.2 Profile Info

The 'Profile Info' window shows key details of the currently selected scan profile.

The fields are read only, so they serve the sole purpose of providing you with information.

7.3 Barcode Table

The barcode table lists all barcodes detected for the entire stack (if it was enabled in the profile). If any two barcodes are identical, they are color coded.

Document ID	Set	Barcode
Document_0001_bb7ebbe5-5bb4-4cab-85a8-2a8201e01821	Seite1	50000077032003
Document_0001_bb7ebbe5-5bb4-4cab-85a8-2a8201e01821	Seite5	1234567890128
Document_0001_bb7ebbe5-5bb4-4cab-85a8-2a8201e01821	Seite6	01234567890128
Document_0001_bb7ebbe5-5bb4-4cab-85a8-2a8201e01821	Seite7	000010004807
Document_0001_bb7ebbe5-5bb4-4cab-85a8-2a8201e01821	Seite7	000010004791
Document_0001_bb7ebbe5-5bb4-4cab-85a8-2a8201e01821	Seite7	000010004784
Document_0001_bb7ebbe5-5bb4-4cab-85a8-2a8201e01821	Seite7	000010004777
Document_0001_bb7ebbe5-5bb4-4cab-85a8-2a8201e01821	Seite7	000010004760
Document_0001_bb7ebbe5-5bb4-4cab-85a8-2a8201e01821	Seite7	000010004753
Document_0001_bb7ebbe5-5bb4-4cab-85a8-2a8201e01821	Seite7	000010004746
Document_0001_bb7ebbe5-5bb4-4cab-85a8-2a8201e01821	Seite7	000010004739
Document_0001_bb7ebbe5-5bb4-4cab-85a8-2a8201e01821	Seite7	000010004722
Document_0001_bb7ebbe5-5bb4-4cab-85a8-2a8201e01821	Seite7	000010004715
Document_0001_bb7ebbe5-5bb4-4cab-85a8-2a8201e01821	Seite7	000010004708
Document_0001_bb7ebbe5-5bb4-4cab-85a8-2a8201e01821	Seite7	000010004692
Document_0001_bb7ebbe5-5bb4-4cab-85a8-2a8201e01821	Seite7	000010004685
Document_0001_bb7ebbe5-5bb4-4cab-85a8-2a8201e01821	Seite7	000010004678
Document_0001_bb7ebbe5-5bb4-4cab-85a8-2a8201e01821	Seite8	50000077032003

7.4 Profile Info Extended

The 'Profile Info Extended' window displays all parameters set in the profile. This window is disabled by default, but you can enable it via Window → Extended Profile Information.

The categories precisely match the profile tabs. Double-click the category or use the buttons to extend or hide them.

Option	Value
General	
Profile Name	Example_Profile
Description	
Scanner	File Importer
Scanning	
Import Path	D:\Dokumentationen\KGS Scan\EN
Recursive	Yes
Delete file after import	No
Specify folder before scan	No
Import Files	No
Specify file while scan	No
Document Separation	
Separation Rule	None
Document Naming	
Document Naming Rule	<%s:Document_%><%e:{0:D4}%>
Configured	None configured
Attachments	
Attachment Separation	None configured
Indexing	
Index Name	exampleIndexfield
Index Field Type	Text
Scope	Document
Indexfield Configuration	
- Hidden	No
- Read Only	No
- Validate	No
- Allow Empty Values	No
- Predefined Value	
Batch Naming	
Document Naming	<%s:Document_%><%e:{0:D4}%>
Export	
Export Type	User selection

7.5 Reset the Layout

If you want to reset the layout for any reason, you can do so using this option. Once configured, **KGS Scan** will restart to apply the changes.