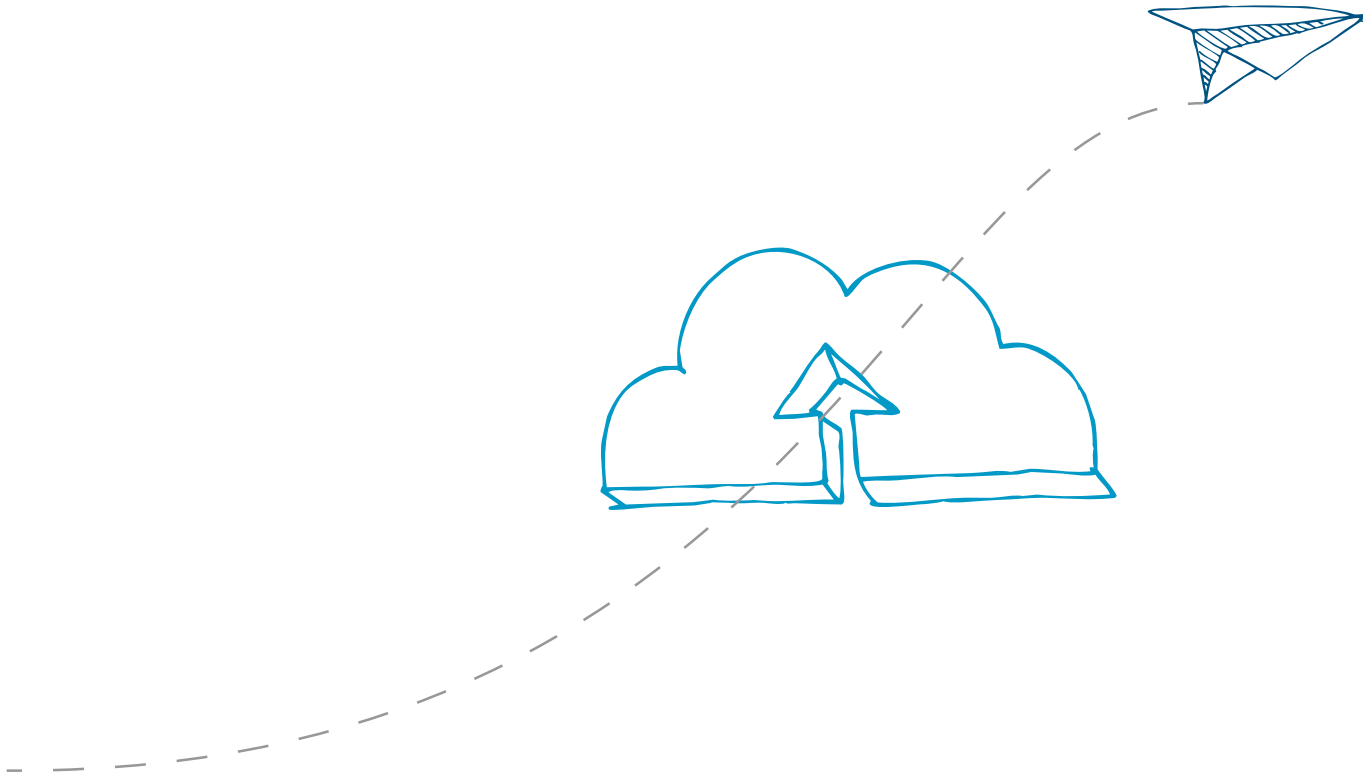




Basware CloudScan User Guide

Version 2.0



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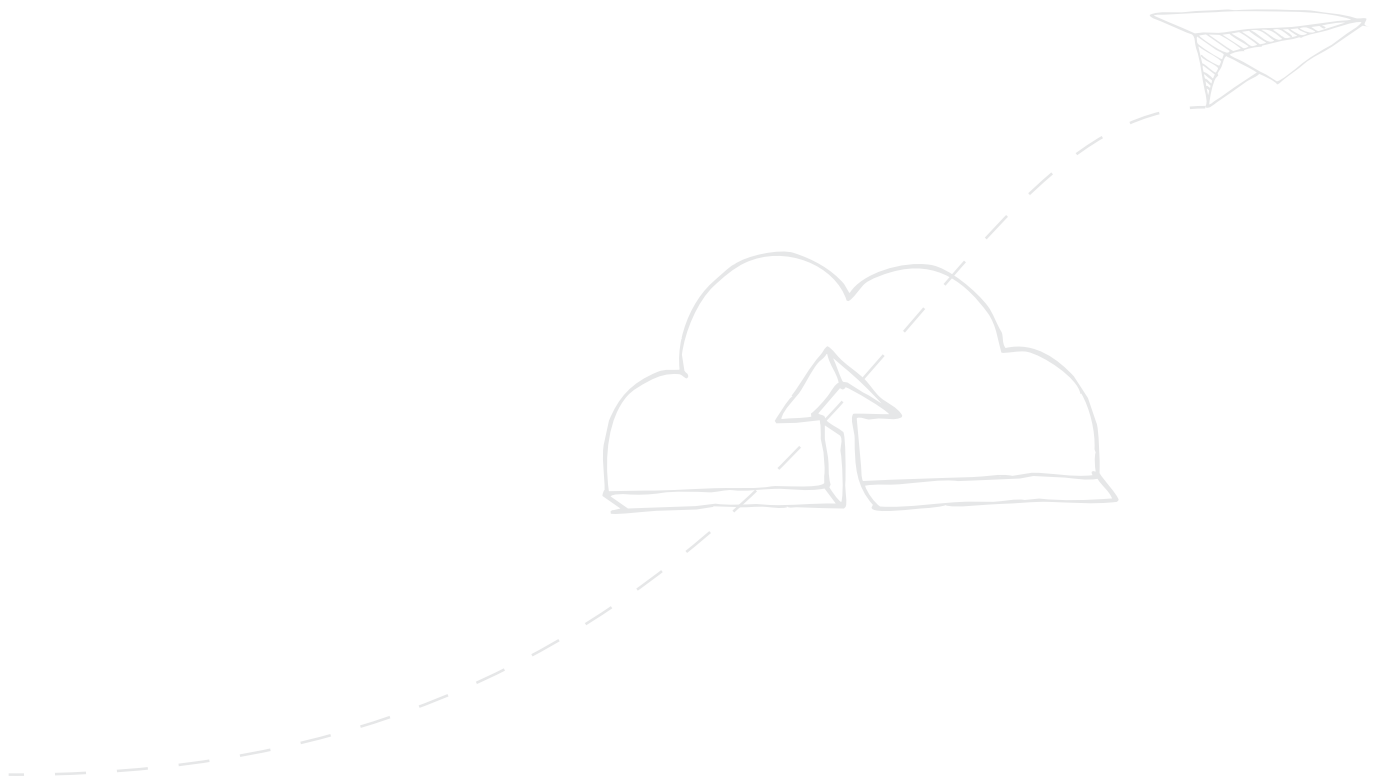


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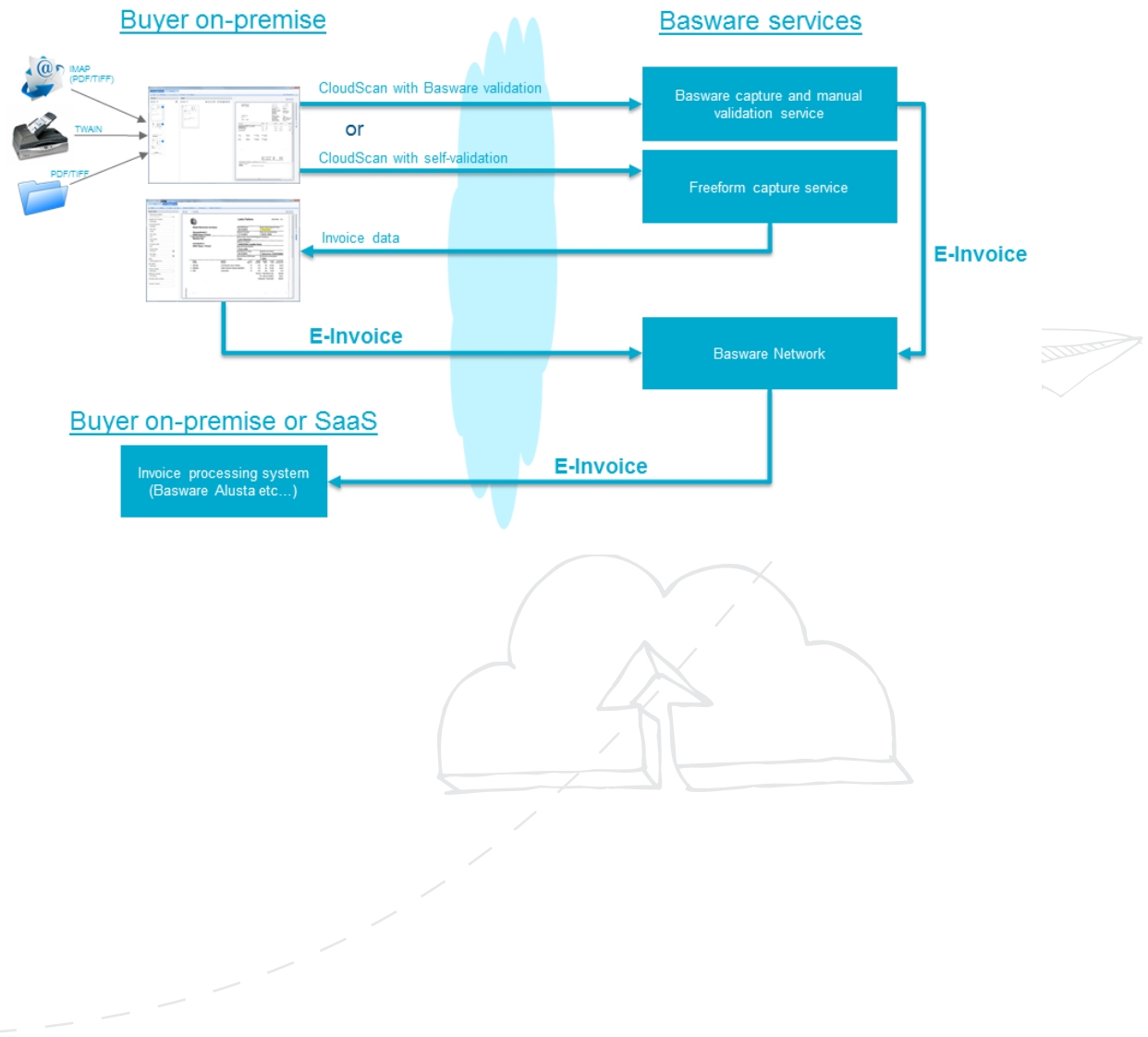


1 About Basware CloudScan

Basware CloudScan is an application that customers can use to scan received paper purchase invoices. The scanned invoices can be sent to the Basware capture and validation service where data is extracted from the invoice images and electronic invoices are then sent back to the customers. This allows companies to outsource the complex and resource-intensive capture and validation phases to Basware.

However, customers can also validate the scanned invoices themselves in the Basware CloudScan application and send them directly to their invoice processing system through Basware Network.

The following figure depicts the scanning and validation process and how Basware CloudScan is connected with Basware capture and validation service and other systems.



2 Technical Requirements

2.1 Workstation Requirements

The workstation requirements must be met to be able to successfully install and use the Basware CloudScan application.

Operating Systems

The following operating systems are supported:

- Windows 7 (32-bit or 64-bit version)
- Windows 8 and 8.1 (32-bit or 64-bit version)
- Windows 10 (32-bit and 64-bit version)

CloudScan is not supported on Citrix XenApp platform. CloudScan uses Microsoft ClickOnce deployment model.

Software Requirements

Basware CloudScan uses [Microsoft .NET 4.5.2 framework](#) (to download and install the package, click the link). The framework must be installed to run the application. It is recommended that the framework is installed before installing Basware CloudScan.

Basware CloudScan also uses components implemented with C++. To be able to run these components, the workstation must have "[Microsoft Visual C++ 2010 Redistributable Package \(x86\)](#)" installed (to download and install the package, click the link).

Hardware Requirements

- Disk and memory: The workstation should have at least 500 MB free disk space and at least 2 GB of memory. Basware CloudScan is not especially a CPU-intensive application, but image enhancements and other image processing happens faster on faster CPU machines.
- Screen resolution: The workstation should have a screen with a minimum resolution of 1280 x 1024 pixels. The recommended resolution is 1920 x 1080 pixels or higher. Better screen resolution makes the user experience better and the application can be used more effectively.
- Internet connection: When installing the application and when using it, the workstation must be connected to the Internet. Basware CloudScan communicates with the services in Basware Network to authenticate the user and to upload scanned invoice images to the cloud.

2.2 Scanner Requirements

A scanner must be connected to the Basware CloudScan workstation with a USB cable and installed properly according to the manufacturer's instructions. Basware CloudScan has been designed to support TWAIN-compliant document scanners. The scanner is selected for invoice scanning depending on scanning volumes and according to the company's special needs.

Scanner features:

- TWAIN interface - mandatory
- Automatic document feeder (50 sheets or more)
- Two-sided scanning (recommended)

Sample scanners:

- Canon DR-M160
- Epson GT-S85
- Fujitsu fi-6130z / fi-7160



3 Installing Basware CloudScan

3.1 First Installation

Basware CloudScan is distributed and installed using [Microsoft ClickOnce technology](#) (for more information, click the link).

1. Open the following link in your web browser: <https://cloudscan.basware-saas.com/download>. Use Microsoft Internet Explorer for the installation.

The Basware CloudScan web page opens:

Basware Corporation Basware CloudScan 2.0

Name: Basware CloudScan 2.0

Version: 2.0.0.8

Publisher: Basware Corporation

The following prerequisites are required:

- Microsoft .NET Framework 4.5 (x86 and x64)
- Windows Installer 3.1

If these components are already installed, you can [launch](#) the application now. Otherwise, click the button below to install the prerequisites and run the application.

Install



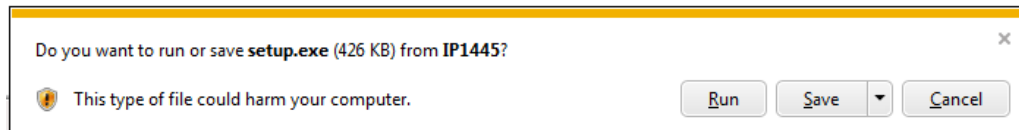
Depending on the web browser security settings, you may need to manually confirm that the installation can start.

2. Click **Install** and follow the instructions given by the installation package.



If the installation does not start, check that the pre-requirements (.NET framework and C++ libraries) have been installed.

The following warning message may be displayed:



3. Click **Run** to continue.

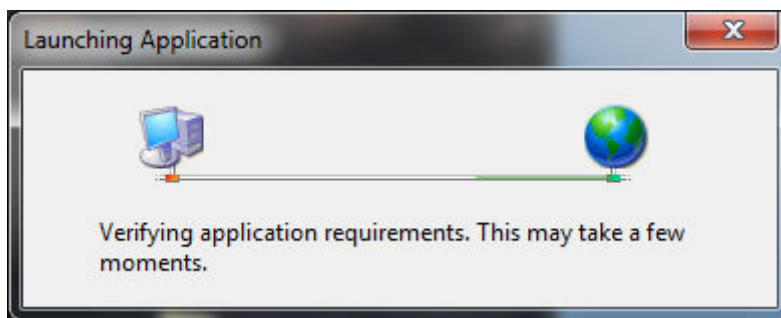
During the installation, follow the instructions given by the installation wizard. If any of the prerequisites is missing from the workstation, it is also installed during the CloudScan installation. Depending on what needs to be installed, the process normally takes between 5 and 15 minutes.

After the installation is completed, a new desktop icon and a start menu item with the name "Basware CloudScan" is installed on your computer.

3.2 Upgrading Basware CloudScan

To upgrade to a new major version of Basware CloudScan (for example, from 1.2 to 2.0), first uninstall Basware CloudScan from Windows Control Panel (see [Uninstalling Basware CloudScan](#)) and then install the new version according to the instructions in [First Installation](#).

When a new minor version of Basware CloudScan (for example, 2.0.1) is released, the upgraded release will be published on the Basware web site. When the Basware CloudScan application is launched, it checks automatically if a new version is available:



When a new minor version is available, in most cases the new version is upgraded automatically or you are asked if you want to upgrade the application.

If you click **Skip** when an upgrade is available, the upgrade is no longer offered automatically until a new minor version is available.

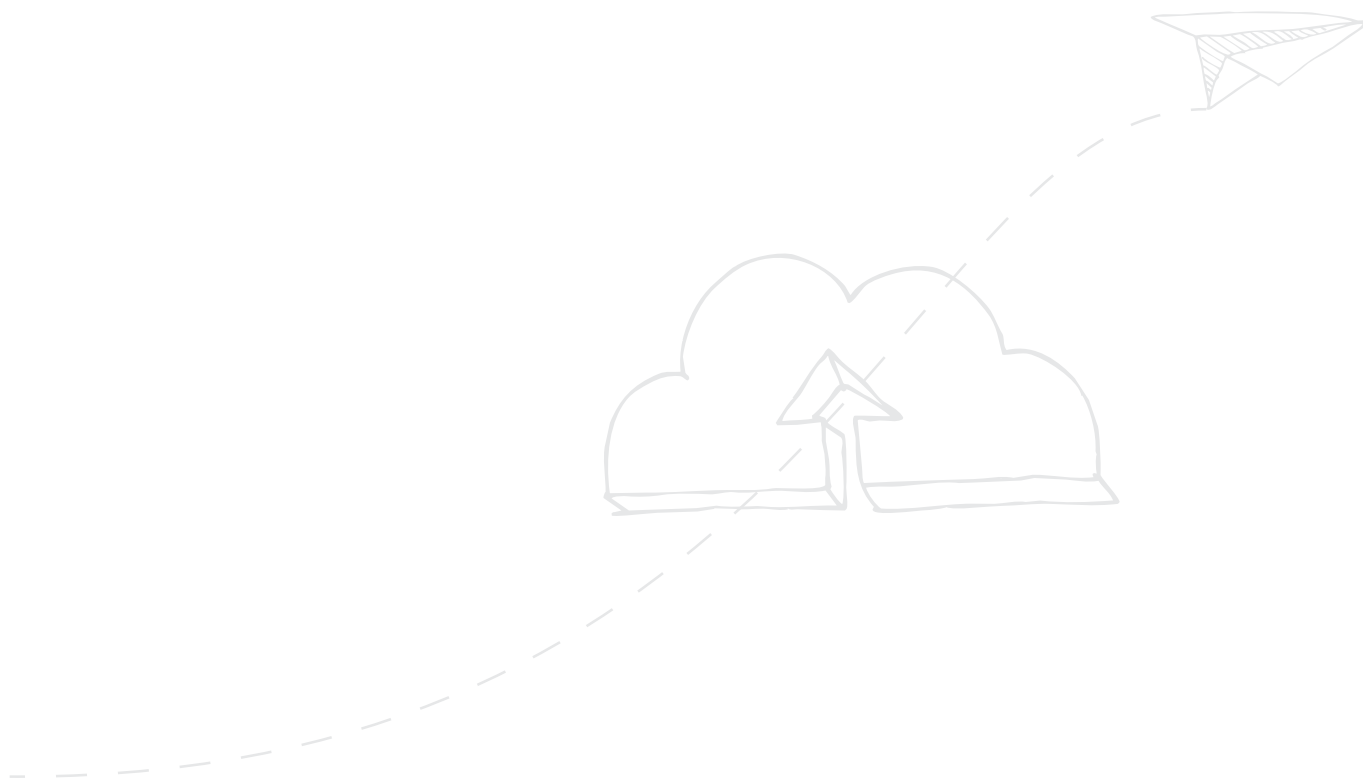
If you want to upgrade the application later, start the installation as instructed in *First Installation*.

The automatic version upgrade distribution helps to reduce software maintenance costs and also reduces the cost of version upgrades. Automatic upgrades also help to ensure that all users have a working application version with the latest upgrades.

3.3 Uninstalling Basware CloudScan

To uninstall the Basware CloudScan application:

1. Click **Start**.
2. Select **Control Panel**.
3. Click **Programs and Features**.
4. Select **Basware CloudScan** and click **Uninstall**.



5 Configuring Basware CloudScan


After logging in, the CloudScan main window opens.

1. First select **Settings**. The **Settings** view includes preferences, scanner settings, and settings for e-mail accounts.



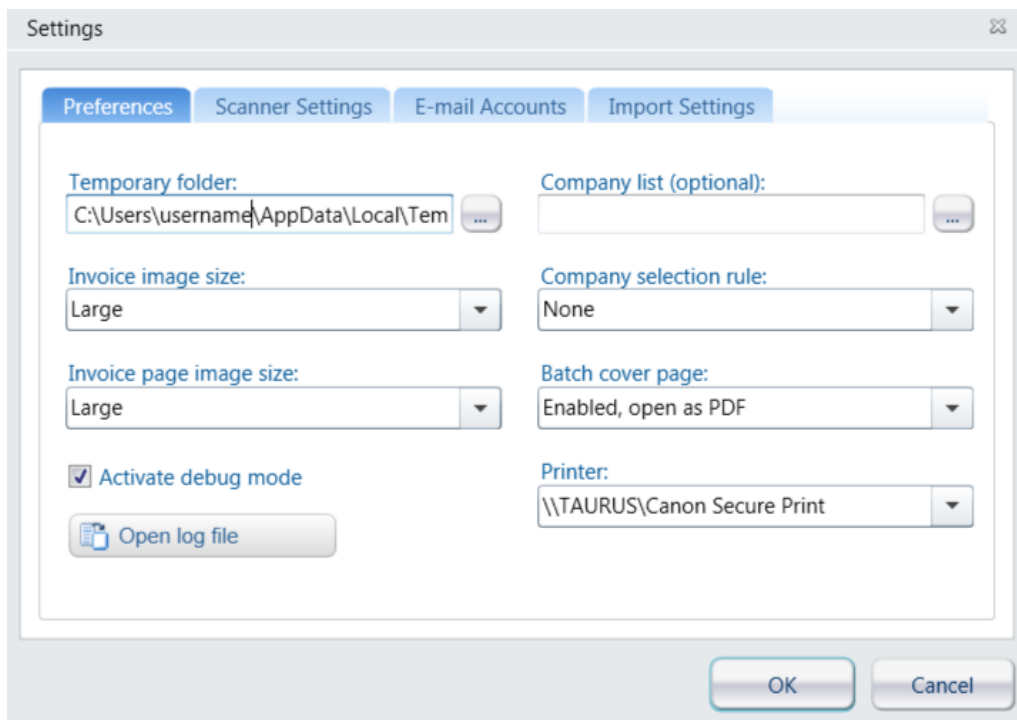
If you do not have a TWAIN-compatible scanner installed on your system, or it is turned off, the following information message is displayed:



 If you want to use a scanner with CloudScan, connect it to the workstation and turn the power on before entering the **Settings** view.

2. On the **Preferences** tab, define your preferences.

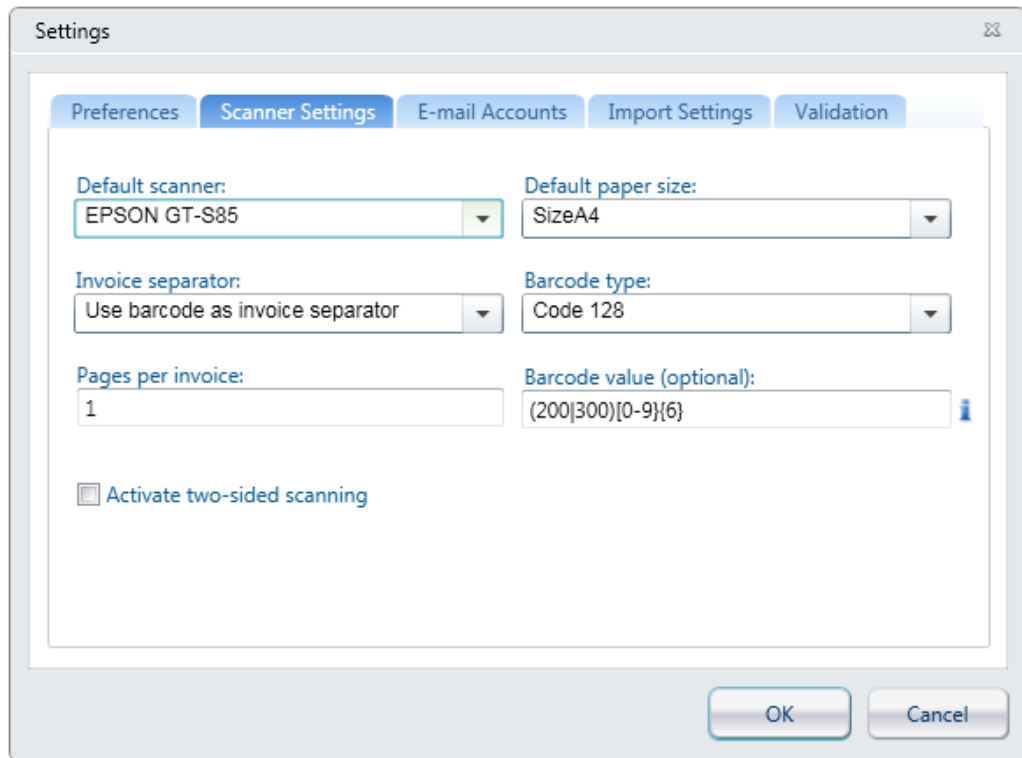




Option	Description
Temporary folder	Temporary folder is automatically set. Normally there is no need to change this.
Company list	<p>Company list is mandatory when self-validation is enabled. The list contains customer's e-invoice addresses, which define where the self-validated invoices are sent.</p> <p>Company list is used when sending invoices to Basware capture and validation service and when it has been agreed with Basware that the person performing scanning selects the company of the invoice. The company list must be in XML format. Detailed instructions on how to create this file are provided by Basware on request.</p>
Company selection rule	<p>Select None, Company must be selected, or Either group or company must be selected. When using self-validation, this setting affects if user needs to select company on scanning tab. When validating the invoice, it is always mandatory to select company.</p>
Invoice image size	Invoice image size defines how large the image thumbnails are shown on the CloudScan main page. You can see what settings work best for your needs.

Option	Description
Batch cover page	Select if a cover page is generated after scanning a batch. The cover page can be printed automatically or you can open it as a PDF file.
Invoice page image size	Invoice page image size defines how large the image thumbnails are shown on the CloudScan main page. You can see what settings work best for your needs.
Activate debug mode	Select this option if you want to activate log file creation under the temporary folder, which may help to solve possible problems with the application.
Printer	Select the printer you want to use to print the batch cover page.

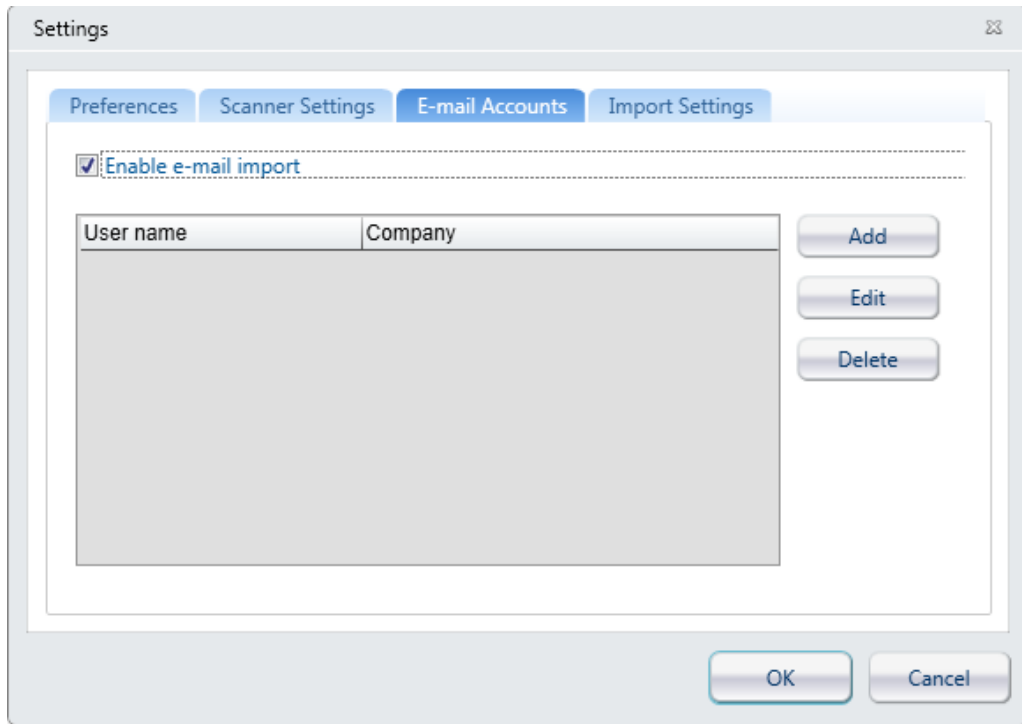
3. On the **Scanner Settings** tab, define the scanner settings.



Option	Description
Default scanner	Shows your TWAIN-compatible scanner (or scanners). Select the scanner you want to use with CloudScan.
Default paper size	Defines the typical paper size for your invoices (A4 or US Letter).

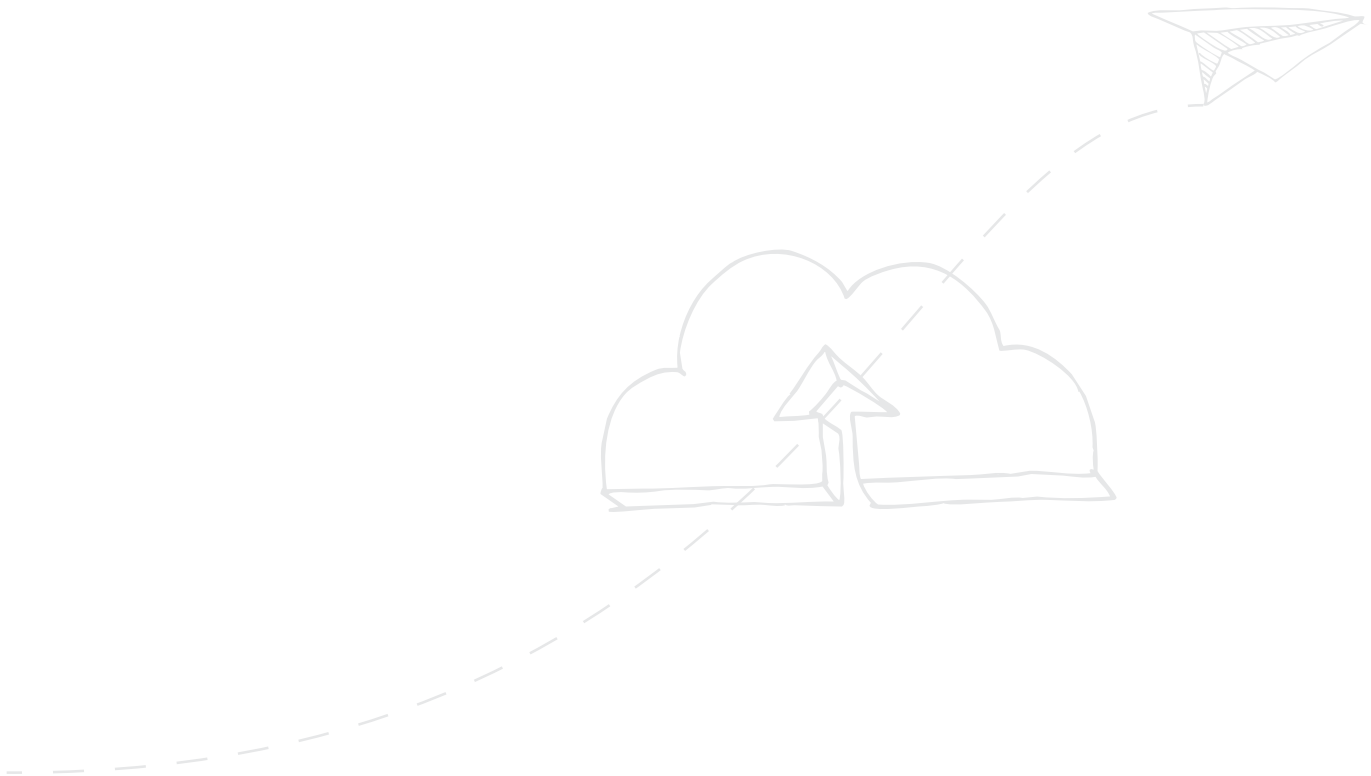
Option	Description
Pages per invoice	Defines how many pages are usually considered to belong to a single invoice.
Invoice separator	<p>Select None if you do not wish to separate imported invoice files with a blank page.</p> <p>Select Use blank page as invoice separator if you want to separate invoices with a blank paper sheet.</p> <p>Select Use barcode as invoice separator if you want to separate invoices using a barcode. If you use a barcode as a separator, no blank page is needed.</p> <p>The barcode is searched from the top third of the page. You can add a barcode to the invoice using a barcode sticker or a barcode stamper.</p> <p>The following barcode types and their allowed values are supported:</p> <ul style="list-style-type: none"> • Code 128 - 3-16 characters, lowercase letters (a-z), uppercase letters (A-Z) and digits(0-9) • Code 39 - 3-16 characters, lowercase letters (a-z), uppercase letters (A-Z) and digits (0-9) • Code 93- 3-16 characters, lowercase letters (a-z), uppercase letters (A-Z) and digits (0-9) • I2of5 - 4-16 digits (0-9)
Barcode type	Select barcode type according to what barcode type is used for invoice separation
Barcode value	Define barcode value using a regular expression. This is an optional setting.
Auto rotate	Defines if automatic page rotation is used. Certain scanners have an auto-rotate feature and when the setting is enabled, CloudScan tries to use that feature. This setting is enabled by default, but if you encounter problems, you can disable the setting. How the automatic page rotation works depends on the scanner and TWAIN driver capabilities.
Activate two-sided scanning	Select this option if your scanner supports it.

4. On the **E-mail Accounts** tab, define if you import invoices from your e-mail folder.



Option	Description
Enable e-mail import	Select this option if you want to enable importing invoices from your e-mail folder.

5. Define e-mail account settings.



Add New E-mail Account ✖

*** Company**
 ...

E-mail Server Settings

*** Server:**

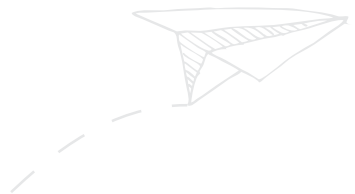
*** User name:**

*** E-mail password:**


E-mail Search Settings ?

*** Import e-mails from:**
 ▼

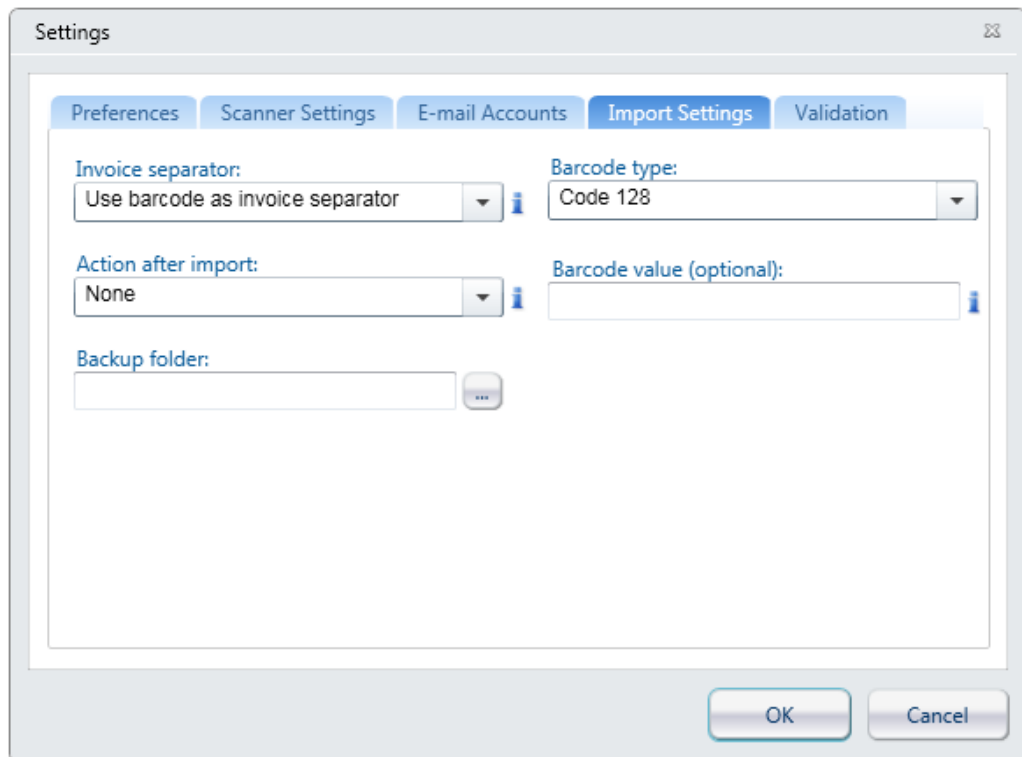
*** After importing move e-mails to:**
 ▼



Option	Description
Company	Select the company for which the e-mail account is added.
E-Mail Server Settings	
Server	Enter the e-mail server name for the e-mail account. Email server must have IMAP interface enabled and configured to use default ports (port 993 for secure connection or port 143 for non-encrypted connection).
Username	Enter the username for the e-mail account.
E-mail password	Enter the password for the e-mail account.

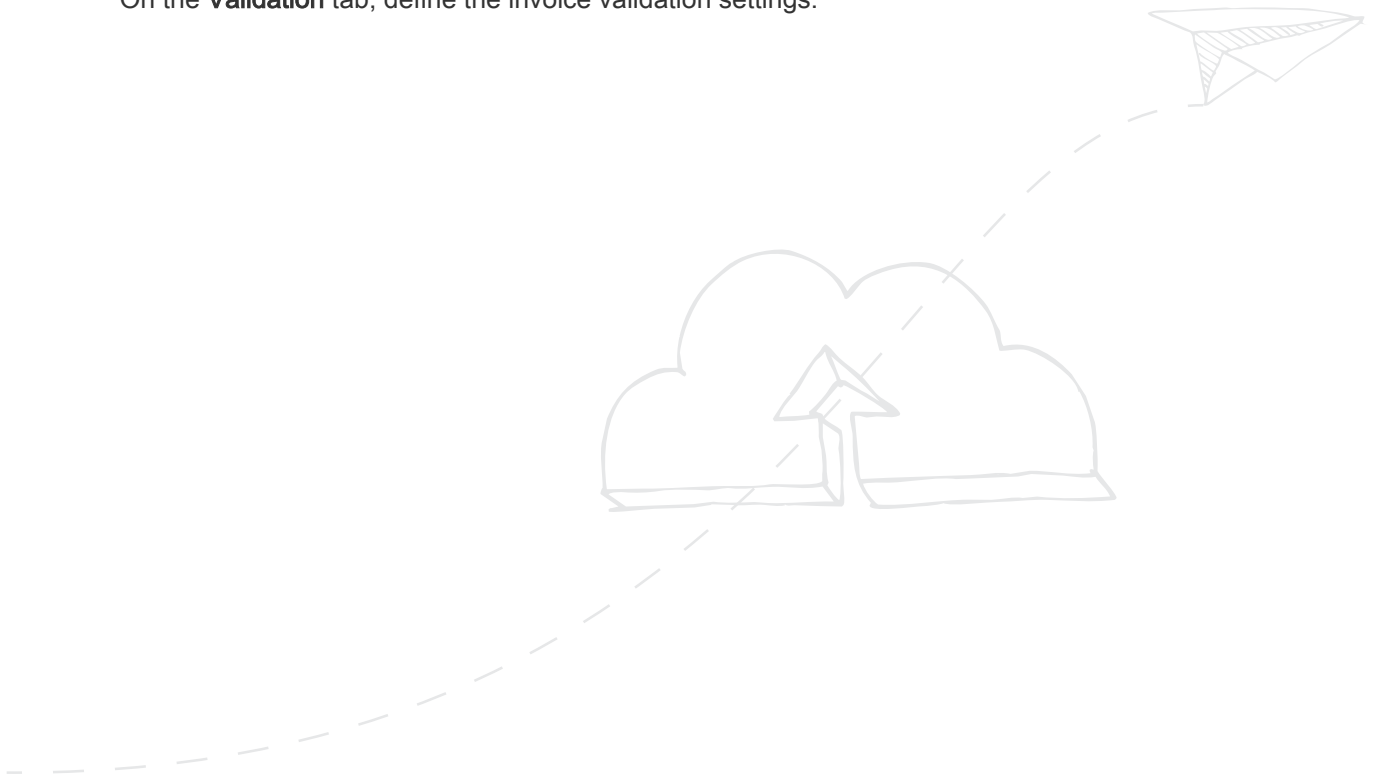
Option	Description
E-Mail Search Settings	 Make sure that your e-mail folders are available before selecting e-mail import settings.
Import e-mails from	Select the e-mail folder from which e-mails are imported. The e-mail folder can be Inbox, Inbox sub-folder or any other folder whose name starts with "Inbox".
After importing move e-mails to	Select the e-mail folder to which e-mails are moved after importing. The e-mail folder can be Inbox, Inbox sub-folder or any other folder whose name starts with "Inbox".

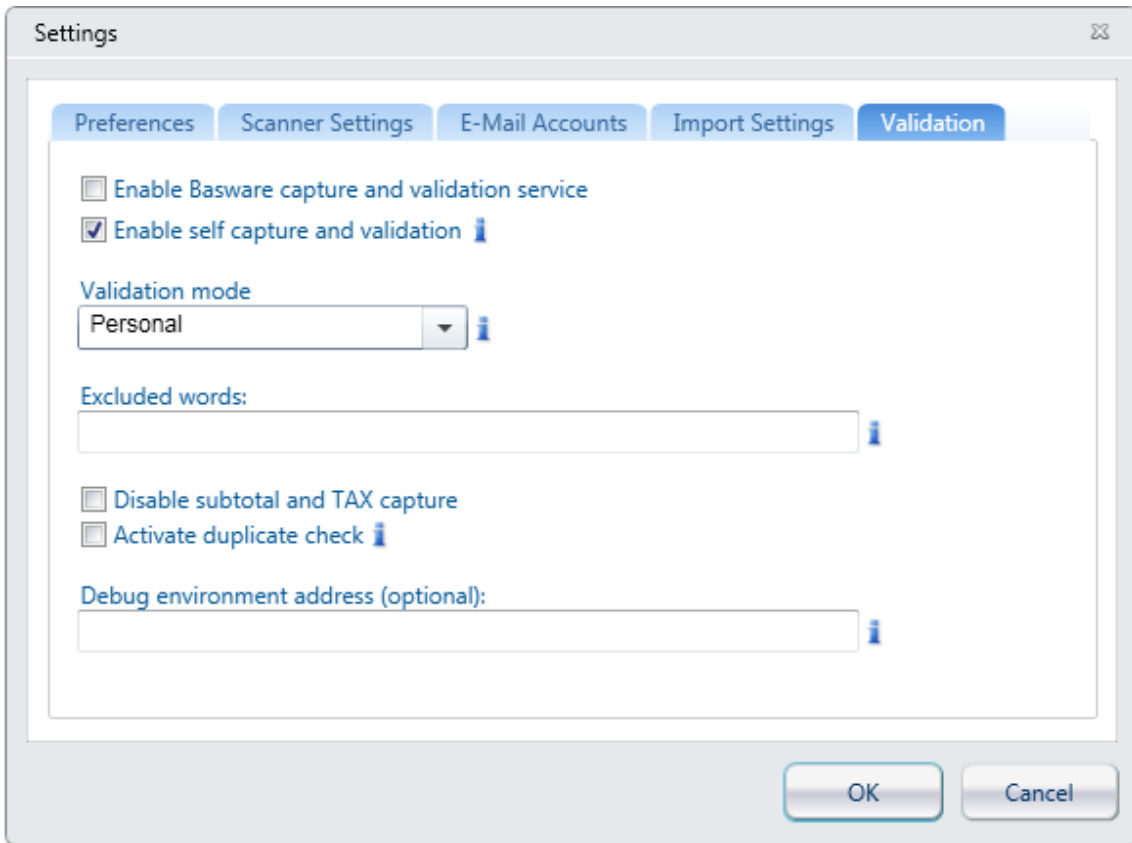
6. On the **Import Settings** tab, define the import settings.



Option	Description
Invoice separator	<p>Select None if you do not wish to separate imported invoice files with a blank page.</p> <p>Select Use one-sided page as invoice separator for single-sided invoices with blank page as separator.</p> <p>Select Use double-sided page as invoice separator for double-sided invoices with blank page as separator.</p> <p>Select Use barcode as invoice separator if you want to separate invoices using a barcode.</p>
Barcode type	<p>Select barcode type according to what barcode type is used for invoice separation</p>
Barcode value	<p>Define barcode value using a regular expression. This is an optional setting.</p>
Action after import	<p>Select what will be done with imported files after the import is complete.</p> <p>Select None if no action is needed for imported files.</p> <p>Select Delete files if imported files are deleted. Select Move files to backup folder if files are to be moved to backup folder.</p>
Backup folder	<p>Select the backup folder.</p>

On the **Validation** tab, define the invoice validation settings.





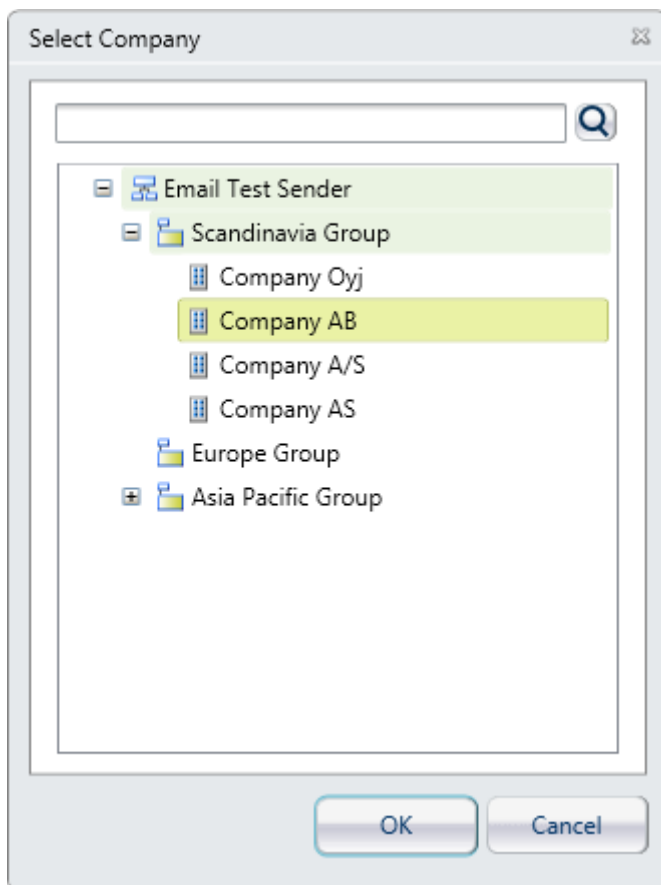
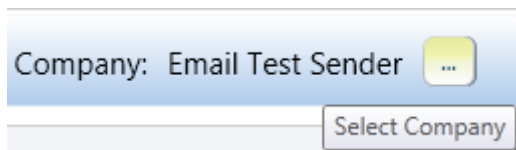
Option	Description
<p>Enable Basware capture and validation service</p>	<p>Select this option if you want to enable sending invoices to Basware capture and validation service.</p> <p>Note that this is an add-on service, which requires a separate agreement. Without the agreement, the invoice images are not processed within the service.</p>
<p>Enable self-capture and validation</p>	<p>Select this option if you want to enable the self-validation function.</p> <p>Invoices can be transferred from the Scan page to the Validate page where you can modify and validate automatically retrieved data and send validated invoices to processing.</p>
<p>Validation mode</p>	<p>Select the validation mode.</p> <p>Personal: Only you can validate invoices that you have sent for validation.</p> <p>Shared: All CloudScan users in your organisation can validate invoices that you have sent for validation. You can also validate invoices sent to validation by other users in shared mode.</p>

Option	Description
Supplier list (optional)	<p>You can import suppliers to CloudScan using a specific CSV file. The file can be automatically generated from the invoice processing system.</p> <p>CSV format:</p> <p>EInvoice_Address Company_Number Company_Name Supplier_Number Supplier_Name Supplier_Address_1 Supplier_Address_2 Supplier_Address_3 Supplier_Postcode TelephoneNo FaxNo VAT_Registration_Number Bank_Account_Number_1 Bank_Account_Number_2 Bank_Account_Number_3 Bank_Account_Number_4 IBAN_Number1 IBAN_Number2 IBAN_Number3 IBAN_Number4 Swift_Code_1 Swift_Code_2 Supplier_EDI_ID CurrencyCode CustomField01 CustomField02 CustomField03</p> <p>Other requirements:</p> <ul style="list-style-type: none"> • The header row is mandatory and all columns must be present in the file. • Columns are separated with a vertical bar ' '. • Mandatory fields (that is, fields that must contain a value): EInvoice_Address, Supplier_Number, and Supplier_Name • EInvoice_Address column is used for filtering the supplier list according to the selected company in CloudScan. <p>After configuring the supplier list, a new Supplier field appears on the self-validation page and you can select a supplier in the CloudScan client.</p>
Excluded words	<p>You can exclude words to avoid incorrect recognition results. Add your company VAT numbers and local business IDs to this field as a semicolon (;) separated list.</p>
Disable subtotal and TAX capture	<p>When this option is selected, CloudScan will hide net and VAT total fields from the validation page.</p>
Activate duplicate check	<p>When this option is selected, CloudScan will give a warning when validating an invoice that has already been validated in CloudScan. Key fields for duplicate check are IBAN, invoice number, invoice date and gross total.</p>
Debug environment address (optional)	<p>Optional server URL for debugging purposes. The server URL is provided by a support person when needed, otherwise the field should be empty.</p>

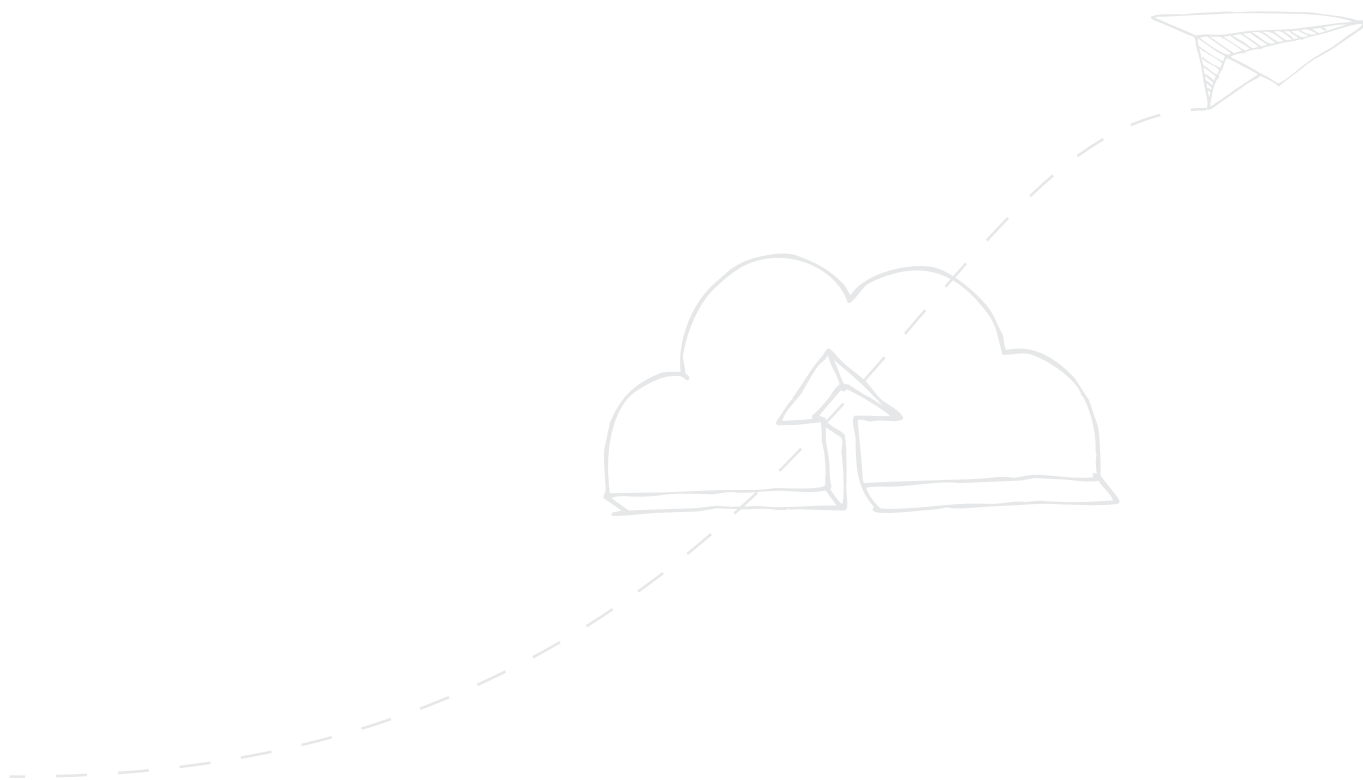
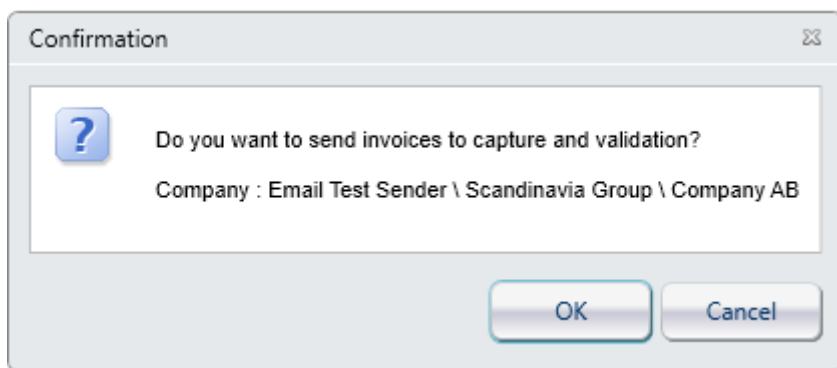
6 Selecting Company for Invoices

After defining a company list, you can select the company before the invoices are sent to capture and validation service. The company selection always applies to all the invoices that are at that time in CloudScan. When doing self-validation, selecting the target company is mandatory.

Select the company from the company selection list.



When sending the invoices to capture and validation service or to self-validation, the confirmation dialogue box tells to which company the invoices are being sent.

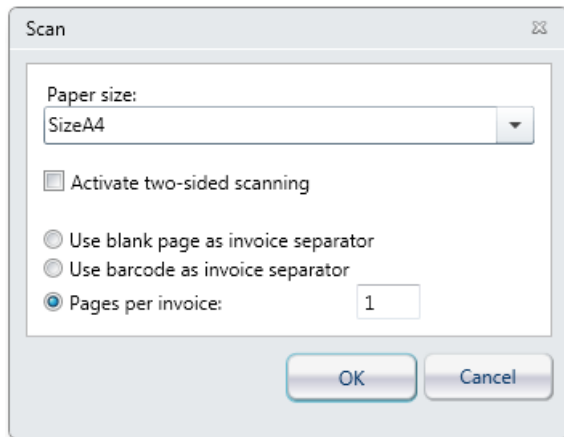


7 Scanning and Importing Invoices

You can scan and import invoices. When scanning, you must have a TWAIN-compatible scanner connected to the workstation. When importing files, you can select any TIF or multipage TIFF or PDF file from a folder. Imported PDF documents must be PDF version 1.4 or later.



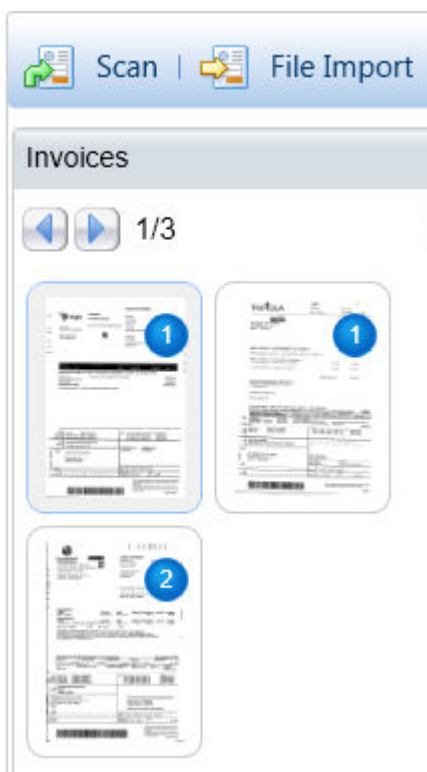
In the **Scan** dialogue box, you can select simple scanning options and then you can scan the invoices. You can change the default values for the settings in **Settings**.



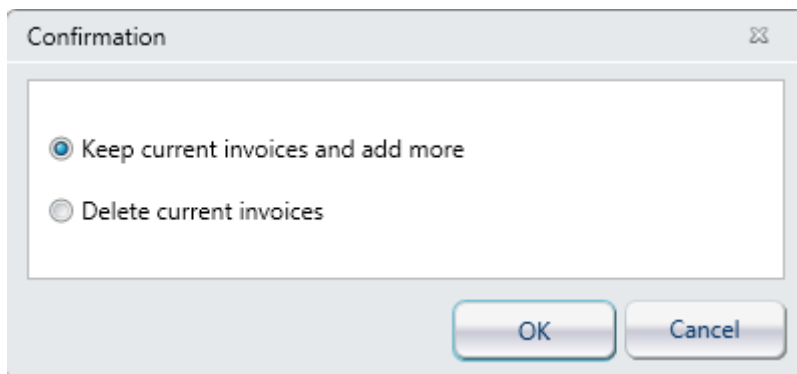
When invoices are being scanned, a progress bar and possibly a scanner-specific dialogue box are displayed.

When scanning is completed, the scanned invoices are shown in the **Invoices** panel of the application:





When there are scanned invoices and you want to scan or import more invoices, click **Scan** and the following dialogue box opens:



Select the appropriate option and the invoices are added to the **Invoices** panel.

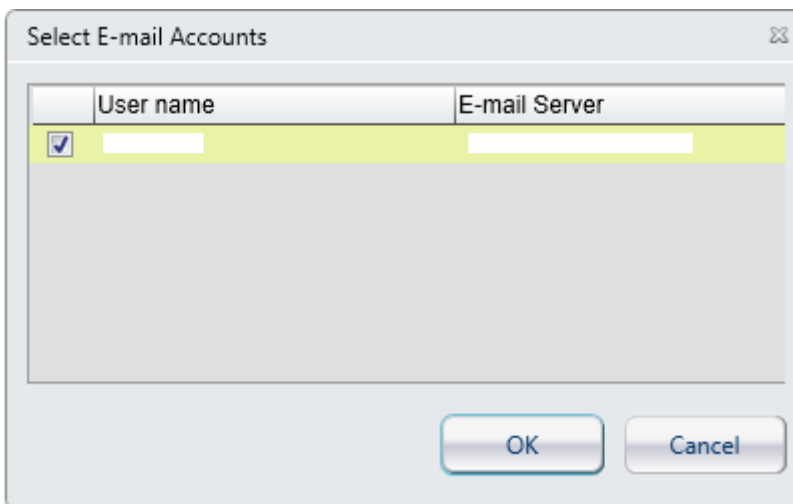
8 Importing Invoices from E-Mails

If your organisation receives invoices as e-mail attachments, it is possible to import them to CloudScan directly from the e-mail account. Make sure that you have configured the e-mail accounts and folders in the settings dialogue box before trying to import attachments from the e-mail account.

CloudScan can import TIF and PDF documents from e-mails. After the attachment has been imported, the e-mail will be moved to the archive folder (as specified in the e-mail configuration).



When importing files from an e-mail folder, you can select the e-mail account from which you import invoice files.



When invoices are being imported, a progress bar is displayed.

When importing is completed, the imported invoices are shown in the **Invoices** panel of the application.

9 Processing and Sending Invoices

Check the quality of the scanned invoices before sending them to validation:

- Have all pages been scanned?
- Have the invoices been correctly separated?
- Are the invoices rotated correctly?
- Is the invoice quality good enough?

You can fix problems using the CloudScan image improvement tools. To fix invoice separation problems, you can drag and drop invoice pages to another invoice.

Tools provided for improving invoice quality:

Table 1:











Tool	Description
	Re-scan pages
	Select pages
	Clear selections
	Delete pages
	Straighten pages
	Remove hole punches
	Remove borders
	Remove noise

Table 1: (continued)


Tool	Description
	Rotate pages

When the invoices look good and all scanning problems have been fixed, the invoices can be validated. Depending on your system settings, you may be able to either; send the invoices to the Basware capture and validation service for validation, validate the invoices yourself or select which option to use. For the system settings, see .

9.1 Sending Invoices to Basware Capture and Validation Service

- To send invoices for validation, click  on the toolbar.
 - If only the Basware capture and validation service is available, a confirmation message appears. Click **OK** to send the invoices.
 - If both the Basware capture and validation service and self-validation options are available, a dialogue box opens. Select the **Send to Basware capture and validation service** option and click **Send**.
- The invoices are removed one by one from the **Scan** page, and when all invoices have been sent, you can start scanning new invoices.

9.2 Validating Invoices Yourself

- To send invoices for validation, click  on the toolbar.
 - If only the self-validation option is available, a confirmation message appears. Click **OK** to send the invoices.
 - If both the Basware capture and validation service and self-validation options are available, a dialogue box opens. Select the **Do self-validation** option and click **Send**.
- After the invoices have been sent to validation, go to the **Validate** page. The invoice is automatically loaded for validation. Note that retrieving the data may take some time. The **Processing** and **Ready for validation** counts on the toolbar show the current situation.







If you want to view the invoice data in two columns, drag the slider between the **Invoice Data** view and image to the right.

The screenshot shows the 'Validate' tab in the Basware CloudScan application. On the left, the 'Invoice Data' panel contains the following fields:

- Receiving company: Basware CloudScan Internal Test
- Supplier VAT number: FI23472668
- Local business ID: 2347266-8
- Net total: 124,99
- VAT total: 30,01
- Gross total: 155,00
- Currency code: EUR
- Invoice date: 3.12.2013
- Due date: 17.12.2013
- IBAN: FI5257222020121718
- BIC/SWIFT: OKOYFIHH
- Invoice number: 301321542
- Reference number: 3013215423
- Purchase order number:
- Contract number:

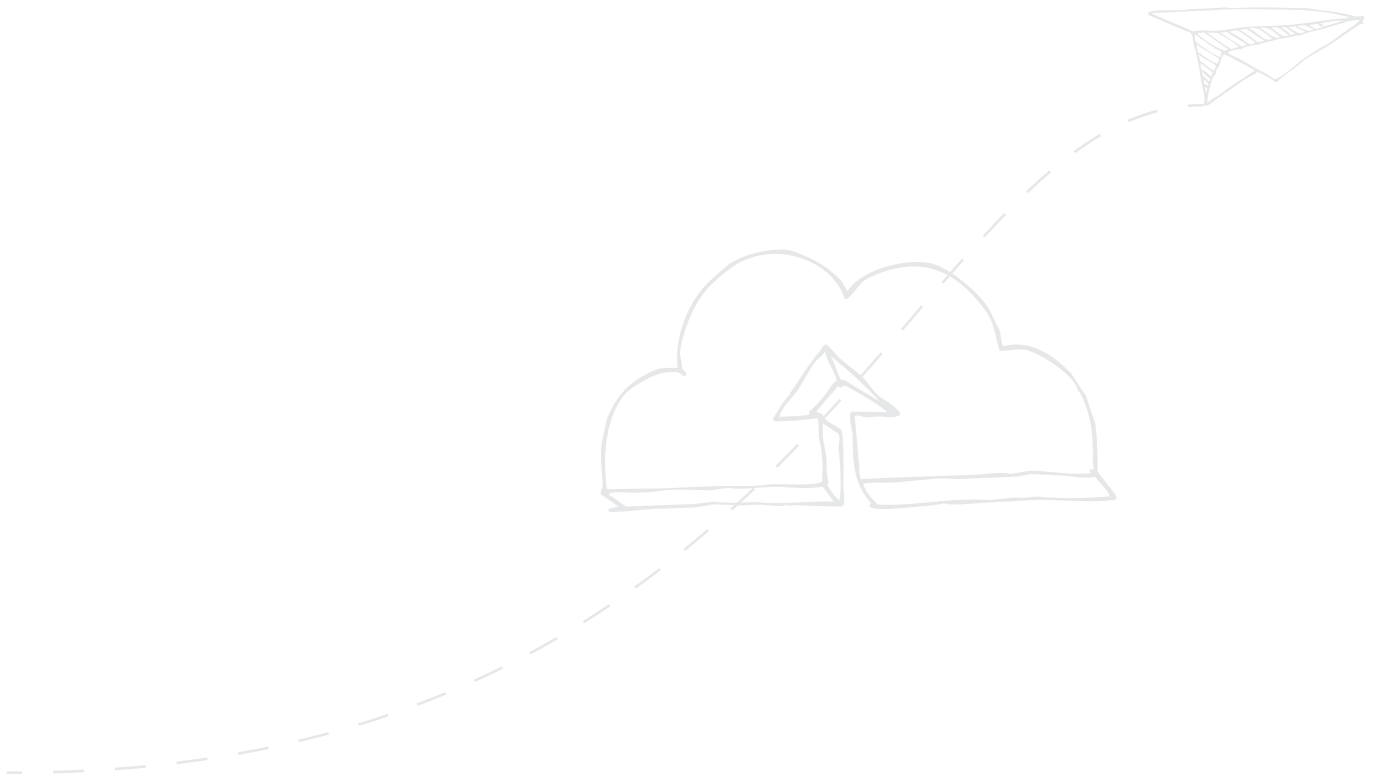
The main area displays a scanned invoice image. At the bottom right of the image, a summary table shows:

Alv / Moms 24,00%:	30,01
Yhteensä / Total EUR:	155,00

- Check the data in the **Invoice Data** fields and make corrections if necessary.
 - When doing self-validation, you must select a receiving company where the invoice is sent after the validation. A list of companies is configured in a configuration file.
 - You can select a supplier, if a supplier list has been configured. You can select only a supplier or a supplier and a bank account. If you select a bank account, the recognised bank account will be replaced with the selected value on the invoice.
 - When you click a field, the corresponding area in the invoice image is highlighted in yellow.
 - To copy text from the invoice image, click  above the image and drag the mouse pointer to select and copy an appropriate area in the image. Double-click the mouse in the field where you want to paste the copied text. If the image contains several pages, this action may not be available on all of the pages.
 - In certain fields, you can use a quick search. Start typing in the text field, and appropriate values from the invoice image are suggested automatically. This action is not available for date fields.
- To send the validated invoice to invoice processing, click  **Send Invoice**.
 - If you want to skip an invoice and open the next one, click  **Skip**. The skipped invoice is moved to the end of the invoice queue.
 - If you want to delete an invoice, click  **Delete Invoice**.

10 Troubleshooting

Problem	Solution(s)
<p>My scanner is connected to the workstation, but Basware CloudScan does not display it in the Settings dialogue box.</p>	<p>Check that the scanner supports TWAIN drivers</p> <p>Check that TWAIN drivers of the scanner manufacturer are installed and updated to the latest version.</p> <p>Reboot the workstation after drivers are installed.</p>
<p>Basware CloudScan displays an error message about missing Microsoft Visual C++ 2010 Redistributable Package (x86) when starting.</p>	<p>Check that C++ libraries are installed (for more information, see <i>Technical Requirements</i>). Install the Microsoft Visual C++ 2010 Redistributable Package (x86).</p>



11 Contact Information

If you cannot find the information you are looking for in this document, please contact Basware Support. The Support personnel will assist you in using the application and send all suggestions for improvement related to the applications or documentation to the supplier of the system.

To find the Basware Support contact information, visit our [website](#).

