



# User Manual

Version 3.5.0

GPL Edition

Manuscan, Autoscan, Importer

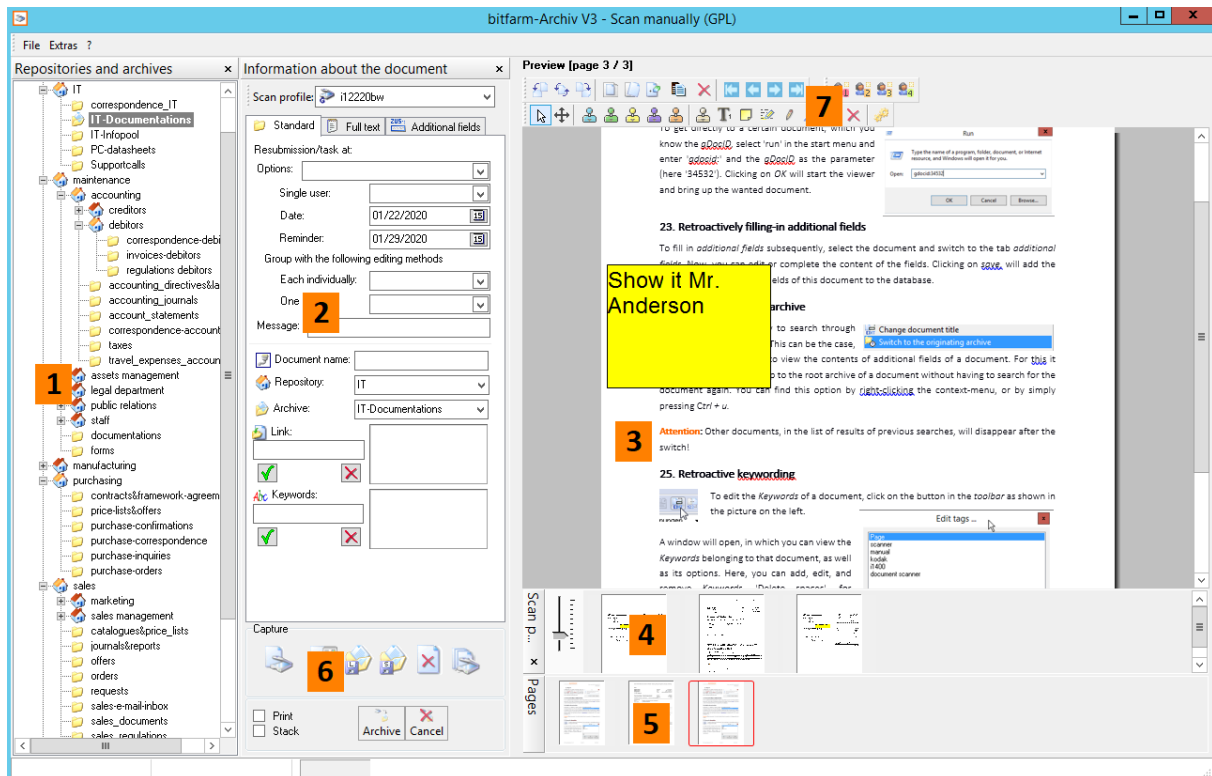
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# I. Manuscan

## 1. Manuscan - Overview

- 1: Archive tree
- 2: Input area for Document-information
- 3: Preview
- 4: Scanpool
- 5: Page view
- 6: Importing options
- 7: Editing options

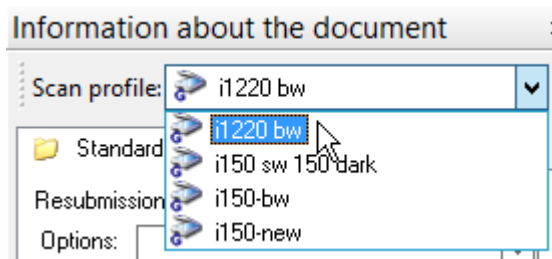


## 2. Import documents using Manuscan

Using Manuscan you can easily scan documents, import and keyword graphic files of many different types.

### a) Select scanning profile

Before scanning, make sure you have the correct *scanning profile* for the document type that you want to scan. If not, select or create another one (see section on *create scanning profile*). To make them easier to identify in the selection, choose descriptive names.



### b) Scanning pages

You can start scanning by clicking on *scan page*. When done, the pages will appear in the *page overview*. Here you can sort them via drag-and-drop accordingly. If you mark a page in the *page overview*, it will appear larger in the *preview*.

### c) Scanning with scanner-dialog

If you scan with the option *scan with scanner-dialog*, the software of the scanner will appear, in which you can adjust the current document. This option is useful for documents with non-standard properties, for which a *scanning profile* does not exist.

### d) Scanpool

Clicking on *Scanpool* will open the *Scanpool-area* above the *page overview*. If you click on *scan page* (or on *scan with scanner-dialog*) scanned pages will now appear in the *Scanpool-area*. This way you can drag all pages from one document from the *Scanpool-area* to the *page-overview* (they will disappear from the *Scanpool*) and sort them accordingly for bundled archiving.

### e) Scanning images from a file

This option allows you to select files from different graphics formats and scan them into Manuscan. Like scanned ones, these pages will appear in the *page overview* or in the *Scanpool*.

#### f) Optimize documents in the preview

In the *preview* and in the *viewer* there are several tools available to adjust the document before archiving (rotate, invert etc.).

#### g) Save images in file

With *save images in file* you can compile all pages from the *page overview* into a single document. The pages will remain in the *page overview* and can still be archived, or deleted manually.

**Attention:** This is only possible with formats that support multiple pages such as: .gif, .tif, .ps, .avi, .pdf and .dcx. It works by entering the complete file name **including** the ending. If you leave out the ending, the file will not be saved.

#### h) Delete selected pages

Clicking on *delete selected pages* will delete the selected page from the *page overview* (not from the *scanpool*)

#### i) Edit document information

Before *archiving* a document you can adjust the *keywords*, *links* and *workflow* settings in the *document information* area.

Under the *Standard* tab you can adjust basic settings possible (or required) for a document.

Above, there are settings for *resubmissions*, where you can decide when it should be resubmitted to whom and when the reminder should be set. You can also enter a message, that will appear in the info-field of the resubmission in the viewer.

Underneath the *workflow settings* you can *name the document*, determine its *storage* and *archive* and add *links* and *keywords*. In the fields for references and keywords you can add multiple items by clicking the green check (or by hitting enter). By clicking on the red cross you can remove them.

The screenshot shows a web-based form for document configuration. At the top, there are three tabs: 'Standard' (selected), 'Full text', and 'Additional fields'. The form contains the following elements:

- Resubmission/task at:** A dropdown menu for 'Options', a dropdown for 'Single user', a date field for 'Date' (01/21/2020), and a date field for 'Reminder' (01/28/2020).
- Group with the following editing methods:** Two dropdown menus for 'Each individually' and 'One for all'.
- Message:** A text input field.
- Document name:** A text input field.
- Repository:** A dropdown menu with 'Company' selected.
- Archive:** A dropdown menu with 'Please select archive...' selected.
- Link:** A text input field with a green checkmark icon and a red cross icon.
- Keywords:** A text input field with a green checkmark icon and a red cross icon.

### j) Stacks

Tick the box *stack* to make multiple pages from one scan behave as a single document when *archiving*.

**Attention:** Tick the box before *archiving* and **not** before *scanning*.

### k) Archiving

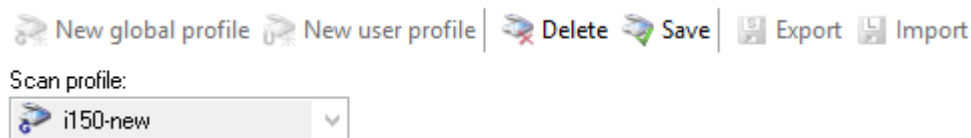
By clicking on *archive* all pages connected in the *page view* will be compiled into a single documents and sent to the server. Now, the next document can be compiled.

## 3. Create a scanning profile

In *Manuscan* you can create profiles for different types of documents or levels of quality. This way the desired settings are always only one click away in *Manuscan*..

To create a new *scanning profile* select *Extras, Options* and then select the tab *Scanning Profiles*. You can find the currently selected scanning profile as well as an option to *create a new global profile (G)* and *create a new local profile (U)*.

**Attention!** To create scanning profiles you need to run *Manuscan* as an administrator. This is especially important when creating global profiles, otherwise it will only be available to the user that is logged into Windows at the time of its creation.



A *global profile* needs to be created with admin access and is available to all users in the workplace. A *local profile* can be created by any user and is only accessible to the one who created it. Clicking on any of these options will open a window, in which you need to name the new profile. Choose a descriptive name to make it easier for you and other users to understand for what purpose this profile was created. To finish click on *OK*.

Now, you will see the name of the new profile in the *scanning profile drop-down menu* and next to it the message **not saved!** If you want to make sure that the profile is saved, click on *save current profile*.

Now, you can adjust the settings for this scanning profile (make sure you adjust the settings of the correct profile because the menu switches back to the default menu after saving!). After saving, start a testing scan to see, if the profile works the way you want it to, or adjust the settings if it does not.

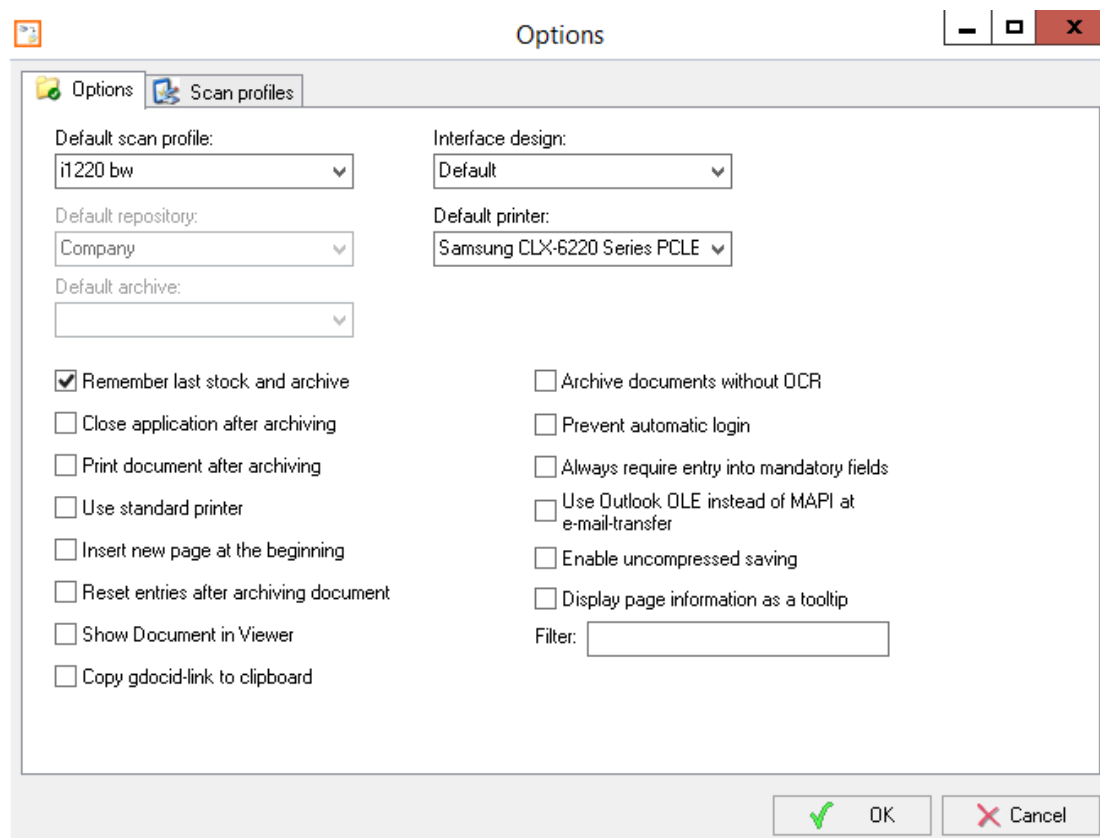
**Tip:** For B&W scanning profiles it is best to use 300dpi and CCITT4-Compression. For color profiles 150 to 300 dpi with JPEG- or LZW-Compression should be used depending on the the document. If you are using a Kodak-Scanner you can use the Color-Dropout in the driver. Make also sure to activate *ADF* (Automatic Document Feeder) and *Stapelscan* (Creating one document per page).

**New:** In Version 3.4.5 scanners with the TWAIN-interface, now use the drivers for error messages, and corrupted pages will be deleted automatically. Because of compatibility issues this function is deactivated by default on older versions of bitfarm-Archiv (*ignoring TWAIN-Errors* active) and can be activated for problem solving with certain scanners. Other changes involve the modes for transfer. You can find the settings in the scanning profiles in Manuscan (Extras then Options).

**Warning:** We attempted to make the TWAIN-control as compatible as possible to past versions of the DMS. However, please take a random sample to check, if it works with the scanner you are using. I In case of problems adjust the settings for ignoring TWAIN-Errors or the modes of transfer.

## 4. Advanced settings

In addition to the scanning profiles you can adjust more basic settings for Manuscan under *Extras/Options*.



Select which of the profiles Manuscan should be set to when starting under *default scanning profile*. Under *default storage* and *default archive* you can set the default target archive at start. If the above mentioned drop-down menus are gray, the options *remember last archive and storage*, could be activated, which set the default archive to the folder in which Manuscan has sent the last scanned document.

With *interface-design* you can adjust the appearance of Manuscan and under *default printer* you can select your preferred printer.



If you do not usually scan more than one page at the same time, you can select to *scan manually then exit* to close Manuscan once the document has been sent to the server. You can also automatically print the document after archiving by activating *print document after archiving*.

By activating *add new page at start* every scanned page will be put in front of the page that was scanned before.

**Note:** This function will *not* invert the order of pages when scanning them all at once.

By default, your entries in the additional fields will be carried over, since in many cases batches with (almost) identical values are scanned. If this does not happen too often, or never, you can *reset additional fields after archiving*.

*Show documents in viewer* opens the viewer after archiving (or activates the window if it is already open) to show the document.

**Note:** If you activate this option without disabling the OCR, the text recognition will take considerably longer and thus it will take longer until the document opens.

If you activate *copy GdocID-Link*, you can use Ctrl+V to paste the link to the document (for example: 'gdocid:389780'). This way you can open the document (for example via *run*) directly in the viewer.

If the document does not have a full text, or if it is not needed, you can *scan document without OCR* to speed up the process.

By default, Manuscan logs into the server with the last used account. If you *disable automatic log in*, it will only allow manual access. This way you can prevent unauthorized scans or scans with incorrect user data.

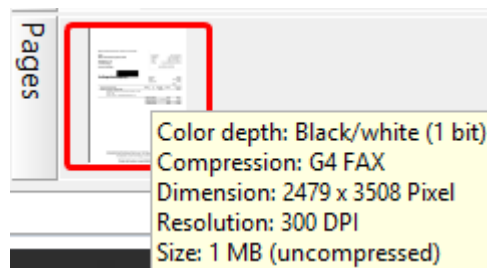
Required fields need to be filled in before scanning. If you do not reset previous settings in Manuscan after every scan, you risk having incorrect entries to your documents. To prevent this you can use 'always ask for required field entries'. This causes Manuscan to always ask you to fill in required fields, even if they already are filled from previous scans.

To send documents from Manuscan via e-mail (extras → *send document via e-mail*) OLE for Outlook is used. When using MAPI the mail will stay in the foreground and prohibit the use of Manuscan until it is sent. You can prevent this by selecting *use Outlook OLE instead of MAPI when sending e-mails*.

If you intentionally created a scanning profile without compression, the document is still going to be compressed during the archiving process. If this should not happen under any circumstance, check the box *allow uncompressed scan*.

*Show page information as a tool tip* opens a window with information on the document, if you move the cursor on the miniature view of the page.

With the 'filter' fields you can enter the most common filters, which are also going to be available for automatic searches. For example, you can use 'barcodemerge', if you do not want to manually extract documents from the scanpool, and they already have a bar code attached to them.



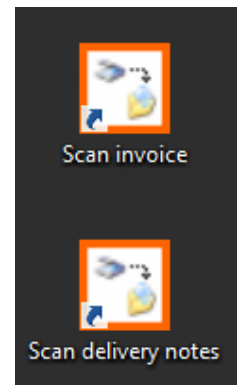
In the *extras* menu under *fields for default values* you can enter default values to the currently selected archive. This way you do not need to enter regularly occurring values every time.

As with most viewer components, you can hide the sections *storage and archives*, *information on document* and *scanpool*. To make them appear again click on *extras* and then on *view: storage and archives*, *view: information on document*, or *view: scanpool*.

## II. Autoscan

You can use other methods for autoscanning apart from *Manuscan* on the dedicated PC. This is usually decided by the administrator, and can be accessed via a shortcut on the desktop or in the program directory.

Doubleclicking on *autoscan* (it can be a different name when other *autoscan*-options are available) automatically starts the scanning process with the predetermined *scanning profile* (see: *Manuscan*) and target archive. If needed, you can set the needed filters for a document type. If filters need to be applied automatically to a certain type of document (rotate, invert etc.), you can set it up here. When the *autoscan* is finished, it will send the scanned documents to the server and then stop the process.

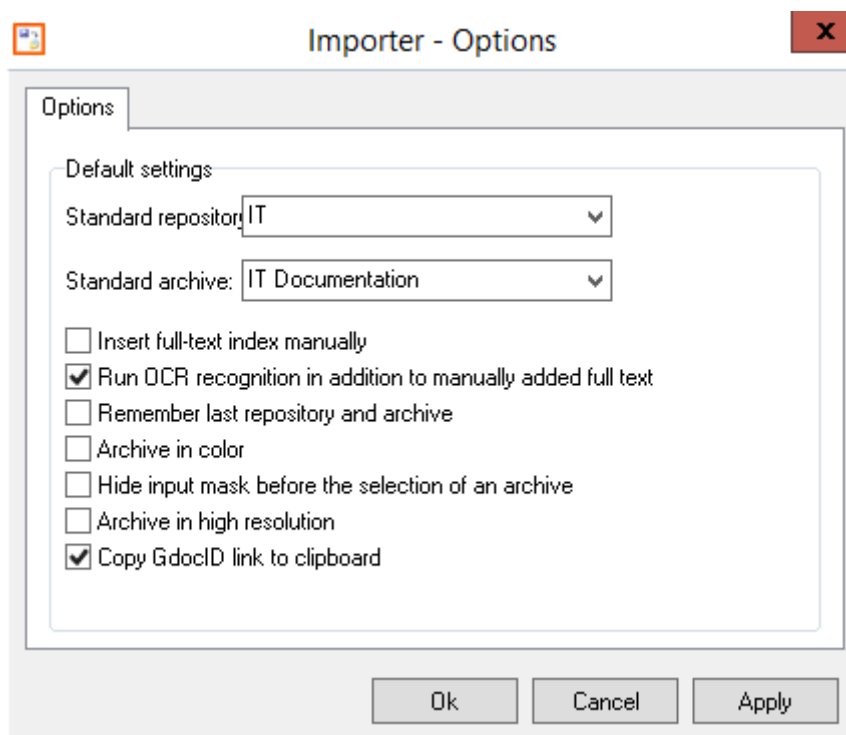


## III.Importer

Of course *bitfarm-Archiv* offers a way to import different types documents. It is even possible to view the original file in the viewer as well as the full text via a TIF-file in the preview. Even formats that are not as common can be archived and viewed as the original file. The only difference is that no TIF-file will be generated and thus no preview and full-text will be available. To make searching for these files easier, it is important to add meta data and descriptive keywords.

The importer offers many options also available when scanning. For example choosing a target archive, adding keywords, starting a workflow, as well as different options for the import (scanning in color, high resolution, or disabling text recognition [see *edit document information*]).

### 1. Importer-Options



You can make adjustments to the *settings* of the importer while it is running.

If the option *remember last storage and archive* is disabled, you can set a *default archive*.

*Enter full text manually*, by default, checks the box *manual full text*. Full text only has to be entered in the related field. You can supplement this with the full text of the document by checking the box *add OCR recognition to manual full-text*.

*Scan in color* and *scan in high resolution* are relate to all manually scanned documents.

To prevent documents from being saved to the wrong archive, use the option *hide input screen* to prevent any input until an archive has been selected.

*Copy GDocID-Link* allows users to use the GDocID in different applications.

## 2. Import via send to

You can import any document or file to the archive via the *send to*



function. You can do this by right-clicking the file and then selecting either *bitfarm-Archiv (copy)*, or *bitfarm-Archiv (move)* under *send to*. Depending on your company's configuration there might be only one general *bitfarm-Archiv* option. If you select *copy*, the file will be copied to the target archive with one remaining in the old one, whereas selecting *move* will move that file from the old to the new location.

By importing documents via *send to* the *original file* will be available as well.

If the option *send to* is not available on your computer, consult the administrator responsible.

## 3. Import via the archive-printer

Another option to send documents to the archive is via the *archive-printer*. This is a virtual printer that is available in the list of printers and can be used like any other printer. In some configurations you can even combine it with real printers to archive a document while printing it out.

If there is no *archive-printer* at your workplace, consult your administrator.

**Attention:** No original file will be archived when using the *archive-printer*!

## IV. Watched Folders

Depending on the configuration of *bitfarm-Archiv* you can also import documents via *watched folders*.

By default, documents that are placed in a watched folder will be processed automatically and then placed in the *undistributed*-archive. This way you can also import from a network scanner.

In the default import-folder the sub-folders will also be watched. It is possible to determine the target archive or the user, who archived the document, using the name of the *watched folder*.

**Attention:** Unlike the other methods, when importing a document from a *watched folder* no import-window will open. The mask for adding keywords will therefore not be available.

If and to what extent *watched folders* are configured for import depends on how the administrator has set up the system. For any information on this ask them about your specific configuration.