

Important disclaimers for using the bitfarm-Archiv DMS

Version 3.5.0

GPL-edition

I. Warranties

bitfarm-Archiv DMS GPL Edition is an open source software, published under the GPL v2 license. You are free to use it privately or commercially without having to pay for license fees. Please read the GPLv2, which will appear as *lizenz.txt* after the installation for further information on your rights and obligations regarding the use of this software.

As its authors and copyright owners, the bitfarm Informationssysteme GmbH Siegen offers this software, *as it is* and without guaranteeing any of its functionalities, to download for free. You are free to choose whether you are going to use it or not. If you do, it is at your own risk. bitfarm GmbH does not guarantee any of its functionalities and does not take responsibility for any problems arising through the installation or use of the software.

II. Support

Technical support for the GPL-version of the software is available in the official forum at: <https://sourceforge.net/projects/bitfarm-archiv/> where other users and sometimes tech-support employees can assist you with problems and questions. Direct support via phone or e-mail is only available after signing a support-service contract (Duration: 1 year, cost: from EUR 996,-) this also includes a remote maintenance service as well as the full enterprise-version.

III. Recommendations for scanning documents

In order for the OCR to achieve a higher rate of text-recognition and thus a better functionality of the full-text search, you should set your scanner to the following settings:

- Data Type: Multipage-TIF
- Color depth: B/W, 1 bit
- Resolution: 300 dpi
- Optimize for „only text / OCR“(if available)

In case documents are scanned in via TWAIN interface, ManuScan or AutoScan, you can set the parameters in the scanning profile. Network scanners that do not use the TWAIN interface should be configured on the device itself, or via an internet browser. Please consult the device's manual for further information.

IV. Recommendations for establishing a digital archive

bitfarm-Archiv DMS is a software used to digitally manage documents and is aimed primarily at companies and institutions. Most operations in companies are not trivial and with that in mind, our software offers great freedom in adapting your company's unique work-structure. Although the GPL-version lacks some features available in the enterprise version, it still offers the same kind of organizing data-sets and thus even this free version provides you with an excellent set of possible configurations.

In many companies the main way of 'organizing documents' is via simple folder structures, in which the main folder is usually the name or number of a project and/or customer. This too is possible using our DMS. However, the underlying database offers many different, often much more sensible, approaches to the organization of documents.

Slightly different from the common explorer-structure, we recommend a more centralized structure in which documents are organized according to sections of a company. This way an employee only has to see the structure that is relevant to his or her immediate work (perhaps some more additional fields). At the next level of organization, documents are ordered by 'type'.

What exactly is a 'type' of document? Let us take a look at the theory of document-typology before we move on. Documents which possess identical or very similar attributes and go through similar processes within a company make a single 'type'. For example, incoming invoices can be classified as a single type as they all have the same attributes such as: Invoice date, supplier, invoice number, ordering number etc. With the DMS, invoices go through a process of check and approval, up to booking and paying in the accounting department. For this you can make use of several different state attributes. Outgoing invoices, on the other hand, are generated by the ERP system and handled by the DMS. In this case there is no need for attributes as there are no further steps involved. Therefore we recommend putting all of the incoming invoices in one 'archive' (name of structure in bitfarm-Archiv DMS, folder symbol) and all the outgoing invoices in a different one. The same principle applies to delivery notes, orders, offers etc. In some cases it might not be as clear: There are different types of contracts for example: renting, leasing etc. All contracts have several attributes in common. For example, they all have a date, term, notice period, contract number, parties involved etc. Here one might consider putting all contracts into a single archive with the type as a drop-down box (required).

As a result, you get a simplified and easier-to-maintain folder structure, which can be navigated and filtered faster and more freely. Access-authorization is improved and you

will experience a structure of documents that is better suited for your specific use and generally more future-proof.

A common problem is often the use of special accessibility (for example when certain people/groups of people are only allowed to view the contracts for renting but not the ones for leasing). In these cases you will have to set up multiple archives or use the enterprise version's function to restrict certain users' access in some domains. Similarly, users gain **temporary access** when they receive a document to their list of tasks or resubmissions.

To underline relations in content, links between documents can be established and used to generate or open documents from anywhere in the archive. This way multiple files for a project, customer, order etc. can be viewed at once. This type of viewing can be done from other systems with parameters, or directly through the keyboard (bitfarm-HotSearch).

Another aspect to consider is the search-performance. This is especially important in bigger archives. Whereas the method of search does not really matter in archives with a couple of thousands of documents, it is crucial to plan ahead when it comes to archives that are more voluminous. Ideally, 90% of searches are done within an archive or through links. Avoid using the global full-text search unless it is absolutely necessary (i.e. it was filed incorrectly). Searching within an archive is very fast and, even in full-text, hundreds of thousands of documents can be researched within seconds.

There are still a couple more parameters that should be taken into account, when planning the DMS for optimal usability and minimized trouble on part of the user. Utilize the over a decade-long experience and know-how in small and big-scale document-archiving of bitfarm GmbH. You will save time, avoid bad configurations and receive valuable advice for your daily DMS uses. You will be amazed!

Did you know that?

- For many data types you can adjust the number of pages appearing in the preview panel to reduce loading times?
- You can compress JPEG-files automatically by simply adjusting the server configurations?
- You can easily set up bitfarm-Archiv on Almost any ERP system with HotSearch, special archive-printers and monitored folders?
- You can achieve much better OCR results with specialized scanners?
- The OCR component of the Enterprise version works not only more precise but also much faster?

- In the enterprise version documents are accessible via their own service rather than through approval?
- ...

V. Upgradability

You can still upgrade from the GPL-version to the enterprise-version later.

VI. Help bitfarm-Archiv!

The GPL-version is free software that is not restricted in any way and can be used freely for private or commercial purposes. We, the bitfarm-team will make sure of that. If you use the software and the DMS is of good use to you, we are happy.

There are no strings attached and you do not owe us anything. If, however you do want to help us, we would be grateful if you could further recommend bitfarm-Archiv!

In the information-age this could mean a post in a forum or a short review on a website with, if possible, linking to our homepage: <https://www.bitfarm-archiv.de>. This would help us establishing a bigger presence on the web which, in turn, means more users and resources to further improve the DMS for you, the user.

If you also write code for the DMS, we would also be very happy if you could share it with everyone. For that, use the forums on SourceForge or send it directly to us so we can make an effort to integrate it as well.

The development- and support-team of bitfarm GmbH hopes you will make good use of our document-management system!

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