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I. Server installation

1. Prerequisites

Make sure that all prerequisites are fulfilled:

- error-free installation of Windows 2000 Server/Server 2003/Server 2008 within an active directory or XP pro, Vista Business/Enterprise/Ultimate or Windows7 pro with local user management for small installations,
- working name resolution (e.g. DNS),
- Windows .Net-Framework 2.0 (minimum),
- secure backup,
- UPS (uninterruptible power supply),
- 2000MB free disc space (depends on data volume),
- free CPU and memory resources,
- open port on firewall for MySQL communication (default port: 6603),
- check anti-virus software and make sure that it is possible to run VB scripts,
- Windows Scripting Host version 5.6 or higher (Windows XP contains version 5.6).

2. *bitfarm-Archiv server setup process*

- a) Run the bitfarm-Archiv server setup program.
- b) Choose the destination directory.

The installer will detect an existing GPL-installation and upgrade it to the new version. You don't need to uninstall the previous installation.

After installation you will find a summary.txt file with all necessary information about your installation (username/password for service-user and mysql), and an install.log for troubleshooting purpose in your installpath (e.g. c:\program files\bitfarm-archiv\)

3. *First steps with the bitfarm-Archiv administration tool*

- a) Run the program "AdministratorV3" from the bitfarm-Archiv program group.
- b) Choose MySQL server "GPL-3.4" and click "Connect to MySQL Server".
- c) Enter the user and password for the MySQL server (sa/sa), which have been configured during the setup process.
- d) Now select "bitfarmv3" from the "database name" drop-down list and click „Open database“.
- e) Choose the tab "Users and groups" and create additional users and groups. Under the tab "Archives" you can create repositories and archives. Make sure that you move new archives underneath a repository. Choose an archive and in the right pane move users and groups, who shall have access to this archive, from "Free users and groups" to "users with access". Mark users and set checkmarks on all the privileges you want to grant.

Now you can create additional users, groups, repositories and archives with additional fields and status fields and set permissions. As best practice, do not use spaces or special

characters within the name of an archive, instead you can use hyphens or underscores to connect words. Create a trash archive if necessary, because you cannot delete any data but move them to the trash. It's important to create a corresponding template file for every archive. The administrator tool will inform you when you need to create a template.

Keep in mind that an archive is the last part of the branch within the tree structure. It is not possible to create archives underneath archives. On the other hand you can create nested repositories. It is important that every tree must have a unique root. Do not create repositories or archives that are not docked to the tree.

Now the server installation is finished and you can start the bitfarm-Archiv client for testing. Execute the "ViewerV3" from the "bitfarm-Archiv" program group. Use the newly created user and password. The viewer should start and show you the tree structure.

II. Client installation

1. Prerequisites

To ensure an error-free operation of the client, make sure that all prerequisites are fulfilled:

- error-free installation of XP Pro, Vista, Windows Server 2003, Windows Server 2008, Windows 7
- Windows Scripting Host version 5.6 or higher (Windows XP contains version 5.6),
- proper Windows share access to the DMS server (preferable through AD authentication),
- check anti-virus software and make sure that it is possible to run VB scripts (even when they run from a remote resource within the local intranet),
- open port on firewall for MySQL communication (default port: 6603),
- write access to the registry hive HKEY-CURRENT-USER (especially check this for Vista).

2. bitfarm-Archiv client setup process

- a) Logon to the client as user with administrative rights and execute the bitfarm-Archiv client setup program.
- b) After the license agreement screen, enter the NETBIOS name or IP address of the bitfarm-Archiv server. If needed, change the default bitfarm-Archiv share name. Use the name of the CON file (extension .con in the bitfarm-Archiv folder) as your profile.
- c) If you want to add an additional archive printer enter the interrogated data. (One archive printer will be created automatically, without any further user input.)

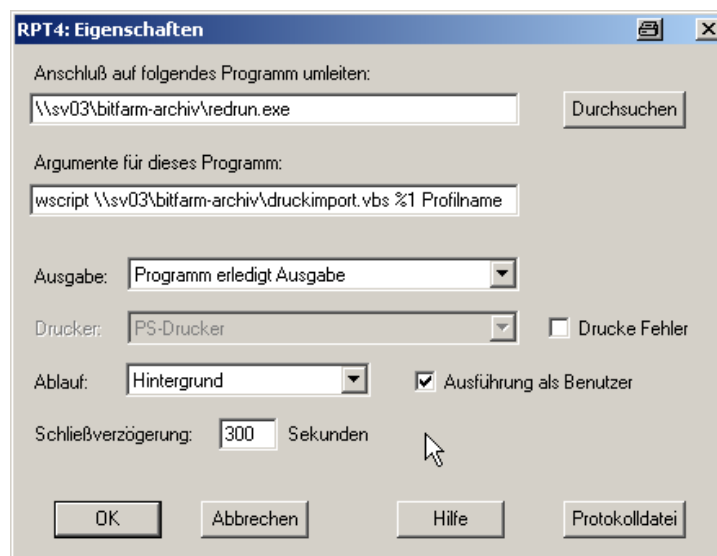
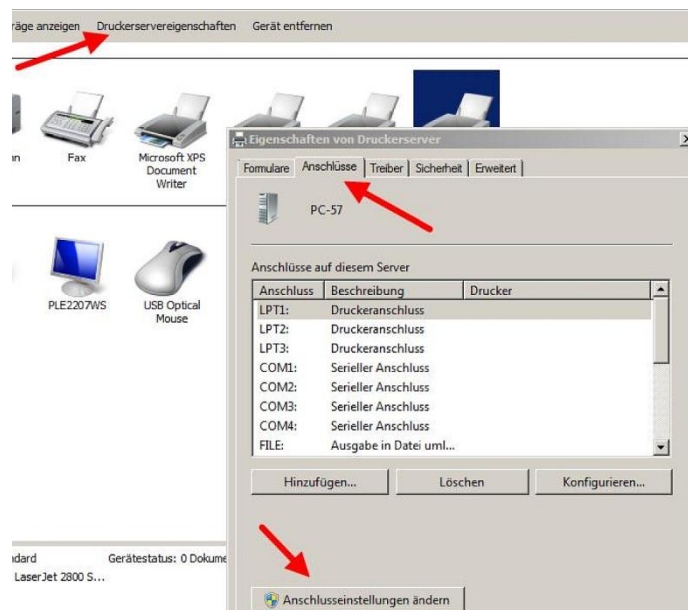
3. Additional archive printer installation

- a) Install a new printer with a name like “archive printer invoices” as a local printer with a redirected printer port. As driver use a postscript printer driver, e.g. Apple Color LW 12/660 PS.

Note: Using *Windows 7* the printer port cannot be established instantly. Create the printer at an existing port first. Also the Apple printer is no more available. Select another Postscript printer, as, for example, the HP Color Laserjet 2800 PS. After the printer has been created, click on “Print server properties” and set up a new redirected port.

After that, the archive printer can be connected to the redirected port.

- b) Open the properties of the newly created printer, click on “Ports” and then choose “Configure”. Configure the port as shown below. Enter your UNC path to the bitfarm-Archiv installation folder on the server and the name of the profile.



If you do not specify a bitfarm-Archiv profile, the archive printer will use the profile of the current viewer session. The profile installed by default is called “bitfarm”. Keep in mind that the login of your last viewer session will be used and if you want to send your document to another database, you have to establish a connection to that profile before.

Hint: Since Windows Vista, all printer installations and configurations must be run as “administrator” (right click, and choose “run as administrator”).

Hint: Optionally you can define a printer, which will print the archived documents simultaneously (in this case you must enter a profile name: Profile=bitfarm). The printer name is the third parameter in the script. The printer must exist locally on the bitfarm-Archiv server, but you can also use shared network printers, e.g.:

```
wscript \\dms-server\bitfarm-archiv\druckimport.vbs %1 Profile Printer2_DMS-Server
```

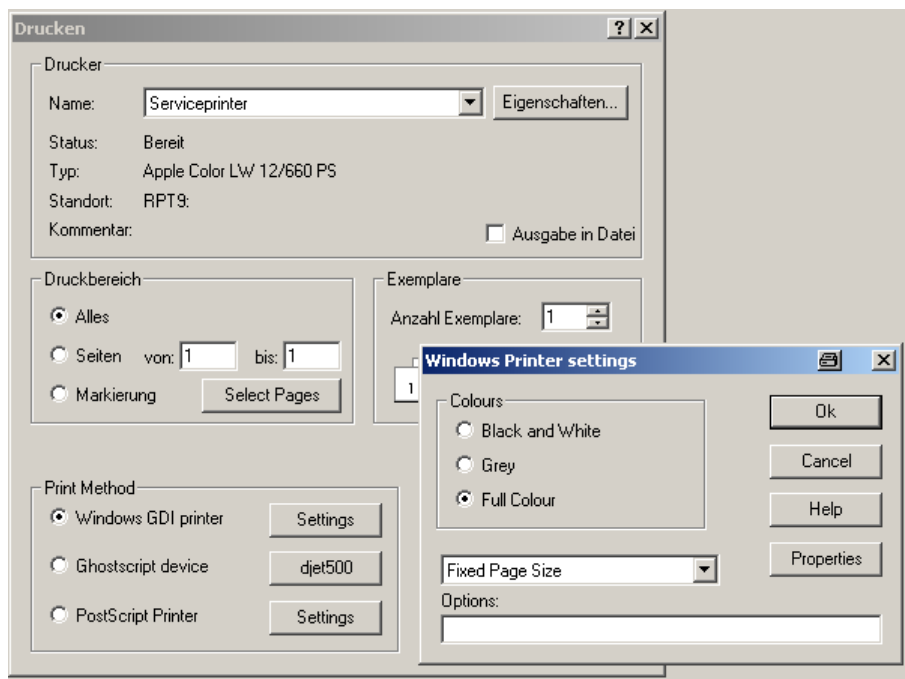
or

```
wscript \\dms-server\bitfarm-archiv\druckimport.vbs %1 Profile \\Printserver\Printer1
```

Hint: The printer name must not contain any hyphens, because Ghostview will stop with an “Error parsing command line” error!

Hint: At the moment a standard archive printer cannot be used on a terminal server, because the importer window will not be displayed in a terminal session.

Hint: If you need color print outs, you must reconfigure Ghostview as follows. Start Ghostview and choose “File” -> “Print”, pick a postscript file to see the print dialog box. Within the print dialog box choose “Windows GDI printer” and click on “settings”. In the new box you can choose “Full color” for color print outs.



4. Configuration of the manual scan tool

On clients with TWAIN compatible scanners, you can use the manual scan tool “Manu-Scan” from bitfarm-Archiv to capture documents. Configure the tool as follows:

Execute the “ManuScanV3” program from the bitfarm-Archiv program group. Choose “Extras”, then “Options” and then “Scan profiles”. Here you can create your scan profiles, at least one for b/w scans and one for color scans, preferably as global profiles.

After the creation of the new profiles, you can define a standard scan profile within the “options” menu.

Hint: The best settings for b/w scan profiles are 300 dpi and CCITT4 compression. For color scan profiles, you should use 150 to 300 dpi (depending on the original) with JPEG or LZW compression. Owners of Kodak scanners can additionally use a “Color-Dropout” setting directly within the driver options. Pay attention to the ADF (Automatic Document Feeder) setting and batch scan (create an archive document from every single page) setting.

Hint: It is mostly better to scan the original in a higher resolution to make the OCR more accurate. For archiving, the documents can be rendered by a filter program automatically to a lower resolution to save disc space. It is good to know that this rendering process will extend the processing time on the server, because this could be a problem during time critical server runs.

5. Automatic scan process installation

It is possible to configure the scan process for automatic document capturing and document archival without any user interaction. For this, create a shortcut called “AutoScan” on the desktop or in the program group of “All Users”. Configure the properties of the shortcut. In the text box “target” you must enter “autoscan.vbs” with the following parameters:

1. the target archive,
2. the ManuScan scan profile with a leading -G: for a global profile or -U: for a local profile
3. (optional) the graphic filter
4. (optional) the time out value for inactivity detection (value in tenths of a second) -t:%n
5. (optional) paper jam threshold (data throughput in bytes) -j:%n

Example:

```
\\SERVER\bitfarm-Archiv$\autoscan.vbs invoices -G:300dpiBW 300 -standard -t:50 -j:1000
```

6. Finding an appropriate value for paper jam and inactivity detection

To find an appropriate value for the parameters, you must set “scriptdebug=true” within the autoscan.vbs. From now on the autoscan.vbs will write into a log file (%temp%\bfa-scanner.log) every time you use it. Below you can see an example log file. Have a look at the second column from the right. It shows the average read throughput. During a paper jam, this value will increase dramatically. It is necessary to find a threshold, to identify a paper jam clearly.

10.05.2007 16:10	1396	6	4	2	6	4,5	0
10.05.2007 16:10	1400	4	6	4	2	4	0
10.05.2007 16:10	1404	4	4	6	4	4,5	0
10.05.2007 16:10	1408	4	4	4	6	4,5	0
10.05.2007 16:10	1412	4	4	4	4	4	0
10.05.2007 16:10	1416	4	4	4	4	4	0
10.05.2007 16:10	1423	7	4	4	4	4,75	0
10.05.2007 16:10	1423	0	7	4	4	3,75	0
10.05.2007 16:10	1484	61	0	7	4	18	0
10.05.2007 16:10	2542	1058	61	0	7	281,5	0
10.05.2007 16:10	3992	1450	1058	61	0	642,25	0
10.05.2007 16:10	5616	1624	1450	1058	61	1048,25	0

(Example: bfa-scanner.log: Rapid increase of the average read throughput to >1000)

For the inactivity detection, take a look at the last column. Here you can see how often the read throughput reaches the value of 0. It is good to know that during a normal error free scan this value can raise. It is necessary to define a threshold value. Above this value, the tool will report a timeout error message, but below this value, the scanner is still working.

10.05.2007 16:09	91	0	0	0	0	0	27
10.05.2007 16:09	91	0	0	0	0	0	28
10.05.2007 16:09	91	0	0	0	0	0	29
10.05.2007 16:09	91	0	0	0	0	0	30
10.05.2007 16:09	91	0	0	0	0	0	31
10.05.2007 16:09	91	0	0	0	0	0	32
10.05.2007 16:09	91	0	0	0	0	0	33
10.05.2007 16:09	91	0	0	0	0	0	34
10.05.2007 16:09	91	0	0	0	0	0	35
10.05.2007 16:09	98	7	0	0	0	1,75	0
10.05.2007 16:09	99	1	7	0	0	2	0
10.05.2007 16:09	99	0	1	7	0	2	0
10.05.2007 16:09	99	0	0	1	7	2	0
10.05.2007 16:09	99	0	0	0	1	0,25	0
10.05.2007 16:09	99	0	0	0	0	0	1
10.05.2007 16:09	99	0	0	0	0	0	2
10.05.2007 16:09	99	0	0	0	0	0	3
10.05.2007 16:09	99	0	0	0	0	0	4

(Example: bfa-scanner.log: "read throughput=0" counter has the value of 35 during a scan)

Suitable parameters for Kodak i30/i40: -j:1000 -t:40
 Kodak i1220: -j:170 -t:60

III. Advanced Configuration and Troubleshooting

1. Monitored folder configuration

To send documents from network scanners or third party applications to the archive, you can create (preferably on the DMS server) a shared folder as document repository. Within the scripts.ini, you configure:

```
ScannerImportPath=
```

and/or

```
ExtendedImportPath=
```

as path to the monitored folder. The bfa spool service now monitors these folders and subfolders you create (subfolders only for the ScannerImportPath). The bfa spool service detects new files in these folders and puts them into the server queue. After that, the files are deleted within the monitored folders. These should always appear to be empty, because this process is very fast.

By default, documents from the monitored folders are moved to the “undistributed” archive. By using sorting rules (see point 2 and 3 within this chapter), you can import to different archives.

It is possible to sort by the name of a subfolder inside the monitored folder (ScannerImportPath). For this purpose, put documents into a subfolder named like the archive to which you want to import the documents. Additionally you must edit the scripts.ini as follows:

```
readarchivfromfolder=true
```

In addition there must be an import template (.tpl in the folder “Templates” in the bitfarm-Archiv folder, which should be created with the AdministratorV3 program) for this archive. You can also use the document name as sorting criterion. It is also possible to derive the user name from the user who is archiving from the folder or document name. Set the corresponding entries in the scripts.ini to do that.

2. Configuration of an automatic sorting process based on document content

Open the bitfarm.wfd file and create a new sorting section based on a logical process sequence like the example below:

```
sorting section Macrotron Rechnung <-- section name
andindocument=Ingram Micro <-- conditions
andindocument=order
andindocument=netto
andindocument=faellig
notindocument=Gutschrift
sortto=Lieferantenrechnungen <-- sorting instruction (Basename of Template-
File)
end section <-- section end
```

With “andindocument=” you determine which words or word groups must occur in the full text of the document so that the sorting instruction will be executed. After you saved the file, all changes are enabled for the processing of the next document. Additionally/Alternatively you can also use “orindocument=” and “notindocument=” as logical functions.

Hint: If it is important that particular (e. g. confidential) documents within special target archives do not go through the automatic sorting process, so that they could get moved by accident into a wrong (public) archive, you must define “nosorting=” for these archives in the “Settings Section”.

3. Configuration of an automatic key word creation process with trigger strings

Besides full text, you can use additional fields to save information for an archived document. To automate this process you must define a naming section for the automatic key-word creation. Edit the bitfarm.wfd file like the following example:

```
naming section Angebote <-> section start
archivtabelle=Angebote <-> condition: archive = “Angebote”
displayname=bitfarm-Angebot <-> assign a new document title

searchstring=Datum <-> search string “Datum” (trigger string)
zusatzfeld=Vorgangsnummer <-> fill the additional field “Vorgangsnummer”
searchsteps=1 <-> ... with the string one step ...
searchdirection=1 <-> ... to the left from the search string.

searchstring=Firma <-> next group: search string “Firma”
zusatzfeld=Kundenname <-> fill the additional field “Kundenname”
getstrings=3 <-> get three strings
nodeletespaces <-> do not delete spaces
searchsteps=1 <-> one step ...
searchdirection=2 <-> ... to the right from the search string
                    (searchdirection statement closes the group)

.... <-> if applicable: additional groups with statement
end section <-> section end
```

Hint: To avoid errors, closely follow the syntax of the .wfd file. Follow the sequence and the case sensitivity.

Hint: As condition you can use exclusively or additionally “andindocument=” statements.

Hint: Instead of searchdirection=1 and searchdirection=2 you can also use searchdirection=left and searchdirection=right.

Hint: If you want to process manually entered keywords from e. g. Manuscan or Importer by a “naming section” (for example, using the manually entered keyword as name for a link), you have to add “searchstring=userinput” to the .wfd file. Additionally you must add Zusatzfeld= and searchsteps=, searchdirection= for syntax reasons although they do not have any function.

4. Troubleshooting

Problem:

The server doesn't process documents and archive them.

Solution:

There are two bitfarm services running on the server.

Check first, if these are actually running and if the service user (normally named 'bitfarm') has full access on the program directory and subdirectories (e. g. c:\program files\bitfarm-archiv\) and the shares.

The first service, called "bitfarm-Archiv Spooldienst", checks if documents (files) are being transferred from a client. These files are normally dropped into the transfer directories .\bitfarm-archiv\uebergabe\ or .\bitfarm-archiv\import, from where the spool service fetches and puts them into the queue directory (.\bitfarm-archiv\queue), together with a corresponding .job file and an additional .slw file (for keywords).

If no files were taken from the transfer directories to the queue, there is a problem with this service, so you should especially ensure that this service is running (system panel -> computer administration -> services) and if the service user has full access on the transfer directories (NTFS and share permissions).

The second service is the "bitfarm-Archiv Archivierungsdienst". This one starts periodically the Archivierung.vbs to process the next pending document from the queue folder. If no changes seem to happen in the queue folder for several minutes, check if the service is running and if the service user has full access to the whole program directory .\bitfarm-archiv\.

Every document will be identified by its .job file, so check, if a .job file exists and the content of the .job file is valid; especially verify that it contains the correct profile.

In a further step, stop the services using the services management or by executing "Stop Server" (in the bitfarm-Archiv program menu) and start the Archivierung.vbs script manually.

If any messages pop up, they might be the reason why the script is not working right, because while running as a service dialog boxes are not displayed.

Problem:

The OCR recognition does not work. The documents' full text ist missing.

Solution:

Check, if the .job files in the queue have got an entry like OCR_Typ=CRE.

.Net framework 2.0 must be installed properly and the apuma.dll has to be registered.

You can register it manually by typing:

```
regsvr32.exe /s "bitfarm-installdir"\Viewer-Files\bfaOCR\apuma.dll
```

at the command prompt.

Problem:

No connection to the MySQL database.

Solution:

Check, if the MySQL service (mysqld-bf) is running and reachable. The port is normally set to 6603 for a new installation; it might vary if you upgraded from an earlier version of bitfarm-Archiv.

(Have a look into the my.ini file in .\bitfarm-archiv\mysql-5.1.xx-win32\; the port is defined in the [client] and the [mysqld] section.)

Make sure that the port is reachable through the firewall. It must be equally defined in the bitfarm.con and bitfarm_Demo.con.