

USER MANUAL

Version 3.6.2

bitfarm-Archiv GPL

Introduction

Welcome to bitfarm-Archiv GPL! We are very pleased to welcome you to the circle of users.

In the age of increasing information, which determines our working world on a daily basis, electronic document management systems are suitable for making the right information available at the right time and in the right place. With bitfarm-Archiv GPL, you have an extremely powerful, state-of-the-art tool at your disposal. From the digital archiving of original paper-based information to electronic documents and media, you will find your collected knowledge in bitfarm-Archiv - and in seconds exactly the document you need.

Use workflows and bookmarks to distribute tasks, monitor their progress and escalate as required. Use links and suitable attributes to create logical document groups in order to realize different views. Work together in groups, even graphically directly on the electronic documents, almost as if you were looking at a sheet of paper. The integrated DLM ([Document Lifecycle Management](#)) ensures that you always work in compliance with the GDPR. The same applies to the legal requirements for storing digital documents ([GoBD](#)). However, appropriate planning and configuration is a prerequisite for all functions.

With this manual we would like to give you hints, tips and tricks to use the full potential of bitfarm-Archiv GPL for your requirements.

The bitfarm Informationssysteme GmbH team wishes you much success and pleasure.

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Standard means of representation in bitfarm-Archiv GPL manuals

This manual uses different notations to emphasize important information. Below you will find a small list of the presentation methods:

Please note: These are important issues that you should be aware of in the next steps in order to avoid problems

Note: Notes represent minor additional information intended to simplify the configuration of your system

Tip: Minor tips for easier administration of the system

Example: For better illustration, certain issues are explained using specific examples

root Important technical terms are shown in italics the first time they appear

`scripts.ini` File names are highlighted with a different font

`ocrxmlfor=` Important commands in configuration files are always highlighted in blue and in a different font

c:\bitfarm-archiv Paths and directories are written in italics

"Save" Quotation marks are used to highlight buttons in programs

bitfarm-Archiv GPL - General information

The bitfarm-Archiv GPL application is the central application within the bitfarm-Archiv system. It is used to manage and process all archived documents and also for configuration by the system administrator.

The application provides you with an overview of the archive and its structure, depending on your authorizations. At first glance, the archive structure may remind you of the Windows file system and the operation appears similar, but the idea behind this structure is different. The aim is to limit the number of archives to the bare minimum and to make it easier to find documents so that there is no longer any need to create and manually search through widely ramified, often unsystematically created folder structures. There is also no need to create large quantities of document copies in order to be able to store and retrieve them in a wide variety of contexts.

For example, an incoming invoice can be stored in the "Incoming invoices" archive without further sub-sorting, but it will still be easy to find in its respective contexts thanks to automatically or manually fillable additional fields and links, both for the management of the project for which the purchase was made and for the purchasing department, which assigns it to an order and can thus check compliance with negotiated conditions, as well as for the accounting department, for which the invoice was sorted to specific accounts.

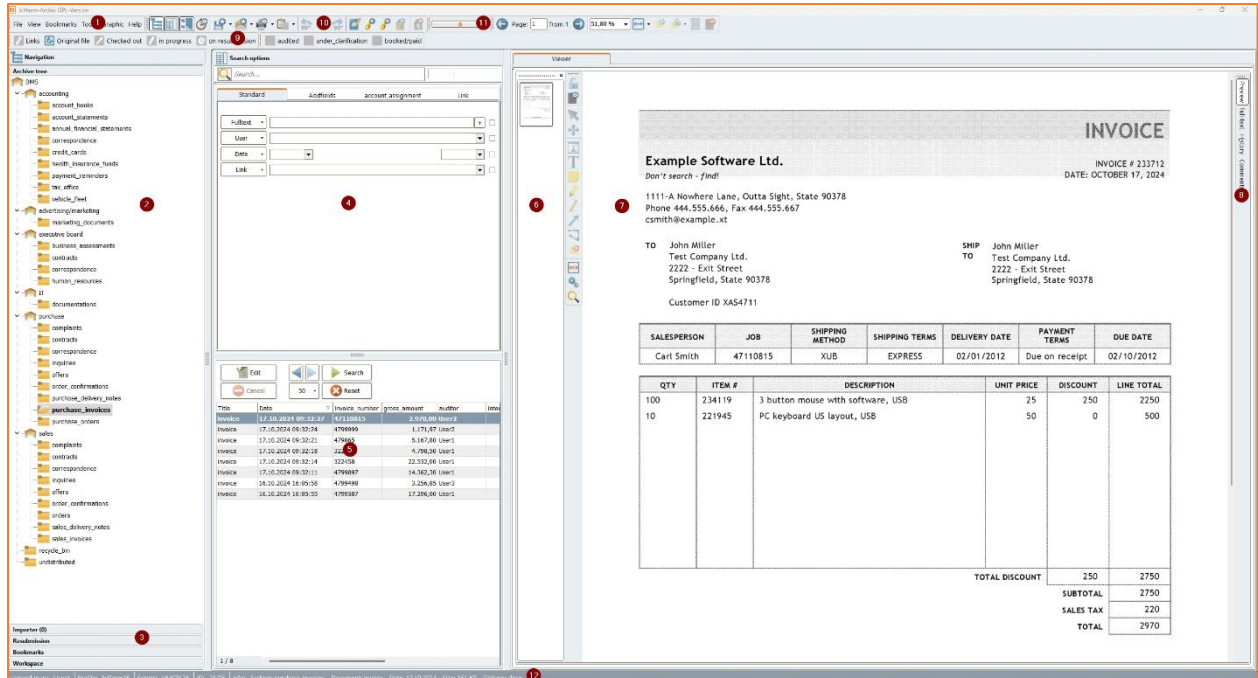
The actual storage location is irrelevant. As part of workflows that have been set up, documents are now submitted to the relevant users for processing and provided with notes and notifications.

In bitfarm-Archiv GPL you can edit documents in a variety of ways. The original file of a document is also available at the click of a mouse, without you having to click through a large number of folders beforehand. With just a few clicks, you can add annotations and highlights to the archived documents, format them and show or hide them as required.

Note: Depending on the authorizations assigned by your administrator, some of the options described in this manual may not be available.

The application of bitfarm-Archiv GPL - Overview

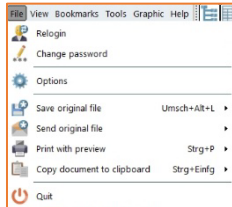
- 1: Menu
- 2: Archive tree
- 3: Bookmark, Importer, Workplace, Resubmission
- 4: Search area
- 5: Result list
- 6: Thumbnail view
- 7: Document preview
- 8: Document properties tab
- 9: Status buttons
- 10: Toolbar
- 11: Queue display
- 13: Info bar



1. Menu (1)

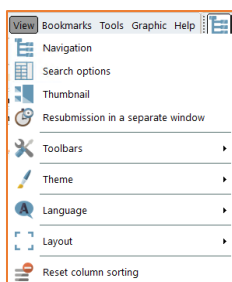
You can access various useful functions and setting options here. Most of them can also be accessed via the respective [icon](#), the context menu or a [keyboard shortcut](#).

a) File



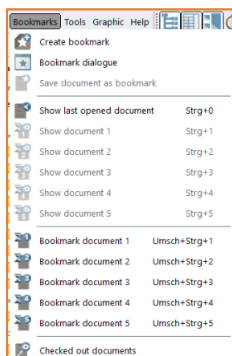
You can make various settings in the application [options](#), which are described in a later [section](#).

b) View



Here you can customize the appearance of the application, which is also possible via the *toolbars* that are displayed.

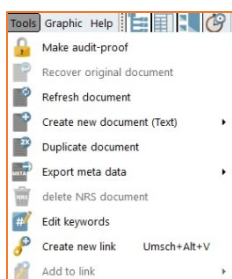
c) Bookmark



You can save searches that you carry out regularly after you have defined the search conditions and clicked on Search. ([Bookmark](#))

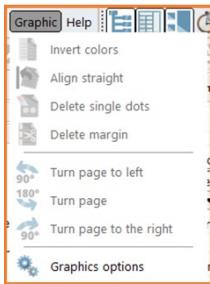
You can also memorize individual documents for quick access so that you can call them up quickly at any time using a key combination.

d) Tools



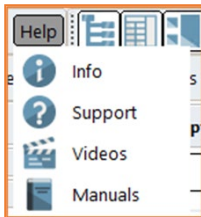
The [Tools](#) menu is described elsewhere in the manual.

e) Graphic



The [Graphics](#) menu is described elsewhere in the manual.

f) Help



Click on *Info* to find out the version of your client application, for example. By clicking on [Support](#) you will be redirected to the website, which will give you the information you need to obtain support for bitfarm-Archiv GPL. The [videos](#) show you practical examples of how the DMS can be used and what possibilities it offers. Some of the videos may show things that are explicitly reserved for the Enterprise version of bitfarm-Archiv DMS. A click on [Manuals](#) will take you to the website where you will find the user manual as well as the system manual, an overview of the keyboard shortcuts and further documentation for the current GPL version of bitfarm-Archiv DMS.

2. Archive tree (2)

The *archive tree* gives you an overview of your entire archive. All storage locations (house icon) and archives (folder icon) are displayed here. However, you can only see archives for which you have the corresponding authorizations.

3. Bookmark, Importer, Workplace, Resubmission (3)

Below the archive tree, you will see various panels. Here you have access to your *resubmissions*, your *bookmarks*, the *importer* and your *workspace*. Explanations of the individual panels can be found elsewhere in the manual.

Note: The administrators of the DMS still have an *administrator panel* at this point. You can use this to directly adjust the archive structure as well as the administration and authorizations of the users. A detailed description of the administrator functions can be found in the system manual. You can move the panels in sequence using *drag-and-drop*.

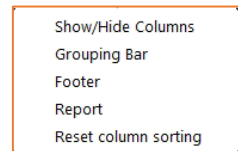
4. Search area (4)

In this area, you can select the various criteria for a search. To do this, use the forms that are offered via the top tabs, the search slot, or combine them. Here you can go directly to the chapter describing the [search of documents in bitfarm-Archiv DMS](#).

5. Result list (5)

The result or hit list represents the result of your search query.

Tip: By right-clicking on one of the column headers, you can customize the hit list and use other useful functions.



6. Thumbnail (6)

In the *thumbnail view*, you can use the navigation buttons to move through the pages of your document or click on the desired pages. The selected page is then displayed in the preview. The page you are currently on is marked with a frame in the thumbnail view.

You can select several pages in the thumbnail view for various actions. Use *Ctrl + a* to select all pages, *Ctrl* and *click* to select individual pages and *Shift and click* on a page other than the last one selected to select these two pages including all pages in between.

Note: Two notepads are displayed symbolically on document pages containing annotations.

7. Document preview (7)

The viewer shows you a direct preview of the archived document. In addition to simply viewing the document, you can also add annotations to the document in the form of stamps, notes, etc. in the preview.

8. Document properties tab (8)

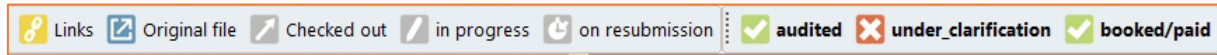


In the *viewer*, you will usually always see the *preview* of the selected document first. By selecting the corresponding tab, you can also view the *full text*, the *history* and any *comments*.

Note: If a comment is stored for an archived document, you can recognize this by the

colouring, see image on the left.

9. Status buttons (9)



The document status is displayed using these buttons. You can find out how to use them and how to carry out a search using the status of a document right here. [Status search](#)

10. Toolbar (10)

The toolbar gives you quick access to certain actions that you would otherwise also access via the corresponding menus or keyboard shortcuts.

Note: [Customizing the user interface](#)

11. Queue display (11)

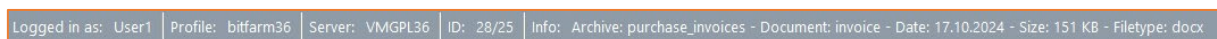
Here you can see how many documents may still be in the server queue and are currently being processed by the server.



12. Info bar (13)

The info bar shows you with which user you are logged into which DMS profile, on which server and in which database. You can also see the ID of the document that you have currently selected. The ID is represented here by Archive_ID/Document_ID (*GDocID*). In the image section shown, the selected document has the *GDocID* 233. You can also see which archive you have selected, the name of the document, when it was archived, how large it is and which original file type was archived here.

Tip: If you would like to know who the author of a note is, move the mouse pointer over this note and the *info* will change: and you will see the author of the note and the date of the last change.



Note: The bitfarm-Archiv Viewer can only display image files directly. If the original file is a scanned TIF, for example, you will see the original file in the preview. If the archived original file is, for example, an e-mail, a PDF, all MS and Open Office formats, etc., you will see an archive TIF in the preview and have the option, provided you have the appropriate authorization, of requesting the *original file* from the server by clicking on the *Original file status*, which will then be opened in the application on your client that is linked to this file extension by default. For Office documents, you also have the option of

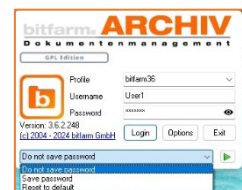
Using bitfarm-Archiv GPL

1. The login window

When you start the application, a login window opens in which you can select a profile and log in with your user name and password. For security reasons, the password is not displayed in plain text. After entering the required data, you can log in by clicking on *Login* or by pressing the *Enter* key.



You also have the option of making settings beforehand by clicking on *Options*. A drop-down menu will then appear, offering you three options: *Do not save password*, *Save password* and *Reset view to factory settings*. If you select *Save password*, you will see the input field for the *password* already filled in the next time you log in; if you select *Do not save password*, you will have to enter the password each time you log in. *Save password* should only be selected if unauthorized persons do not have access to your PC or if it is protected by other security measures!



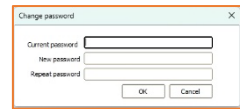
Note: It is possible that the administrator has switched off the saving of passwords for users on the server side, in which case your client-side setting will not be taken into account.

Reset view to factory settings is rarely required, but should problems occur in the application display, they can often be resolved with this function. You can perform all three actions by selecting them and then clicking on the button with the green arrow to the right.

Note: bitfarm-Archiv GPL offers the option of managing users via the Active Directory. If you use this option, the login data in bitfarm-Archiv GPL corresponds to the data you use to log in to your workstation.


2. Change password

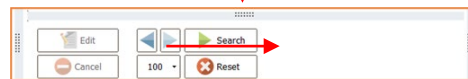
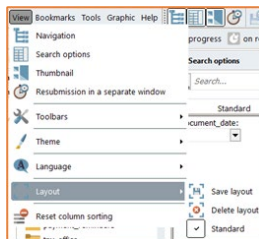
You can change your password at any time. In the *File* menu, you will find the *Change password* option. Clicking on it opens a window in which your old password is requested once for confirmation and you are asked to enter the new one twice (to prevent problems caused by typing errors, as the passwords are not displayed legibly in the input mask for security reasons).



Click *OK* to save the new password.

3. bitfarm-Archiv GPL view

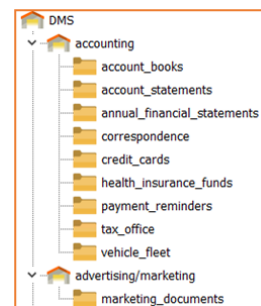
You can customize the user interface of your application either with the help of  the *icons* shown in the image, or via the corresponding *menu* or by clicking on the corresponding *splitters*. (marked by the red arrows in the diagram below)



4. Search

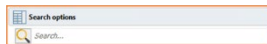
Of course, you can easily search the entire archive in bitfarm-Archiv. However, if you know the exact *storage location* or *archive folder* in which your document is located, it makes sense to select this location beforehand in order to speed up the search and limit the number of results.

bitfarm-Archiv has various search options to achieve the most accurate hit list possible. The *standard search*, which includes the *full text search*



and the search via *status* and *additional fields*.

a) General search field



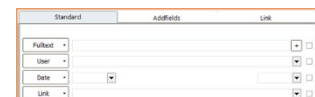
You can determine the behavior of the *general search field* in the application *options*. If you carry out a search using this field, the search will be carried out in the archive on which you are standing in accordance with the settings in the *options*. In this example, a search using the *general search field* would search *the full text, keywords, annotations and additional fields* of the selected archive.



Tip: The key combination *Ctrl + F* places the focus directly in the general search field and performs a search in the selected archive. The combination *Ctrl + Alt + F* also sets the focus in the general search field, but this triggers a search across all archives.

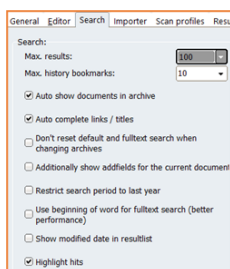
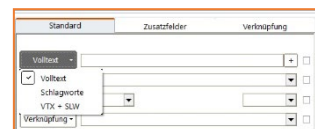
b) Standard search

The *standard search* offers you the option of searching for specific characteristics of the desired document so that you can achieve very precise results. Of course, you can also combine the various search options, e.g. all documents that a user has added in a certain period of time. To do this, simply fill in several fields - the search will only display documents that meet all the conditions entered.



c) Full text search

The main function of the *full-text search* is to find a document based on a specific word in its recorded full text. However, you can also influence the full-text search by integrating the keywords stored for the document or other search criteria into the search.



For performance reasons, it may also be advisable to set the *Limit search period to the last year* and *Use start of word for full text search* option in the *options and settings*. If, for example, you were to carry out a full text search for document number *123456*, no documents would be displayed where the full text contains *x123456*. This option therefore limits the number of hits in case of doubt and also shortens the search time.

Note: If you have not set the option *Use beginning of word in full text search*, the underscore *"_"* without quotation marks serves as a wildcard for any character.

The simple stringing together of search terms performs an AND search using the full text. Extensions and restrictions are possible as follows:

Search term1 **/search term2** corresponds to an OR search - documents containing search term1 *or* search term2 are found,

Search term1 - search term2 corresponds to a non-search - documents are found that contain search term1 but *not* search term2,

"Search term1 Search term2" corresponds to an exact search - the documents that contain exactly the text between the quotation marks are found.

If you have selected *the location marker* in the *options and settings* (this is active by default), the *search* words of your full-text search are marked in the preview of the documents found, with different colors if there are several search words.

Tip: You can use the "F3" key to navigate through the search terms found, which are highlighted in the preview.



Note: The reference marker is initially only available for documents that have received their full text via OCR. Your administrator can set the original file formats for which the reference marker is available.

d) Additional field search

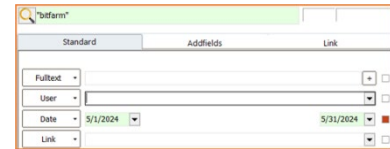
If *additional fields* have been created for documents in an archive, it is also possible to search for their content in this archive. This form of search provides very precise search results, especially if the content of several *additional* fields is defined, and these are also available particularly quickly.

Note: You can use two consecutive quotation marks to search for documents that do not have a value in this additional field.

e) Negated search

To carry out a negated search, you have the option of clicking behind the respective fields in both the standard and the additional field search so that they appear red and then entering what you want to exclude in the field. Of course, this search can also be mixed with the full text search.

In this example, all documents in which *Muster GmbH* appears are displayed in the *archive* on which the *search* is carried out, but not those from the date range entered.



f) Status search

To carry out a *status search*, select the relevant status fields by clicking once in the field for "Status set" (green, tick) and twice for "Status not set" (red, x). A field that is not clicked remains colorless and is irrelevant for the search.



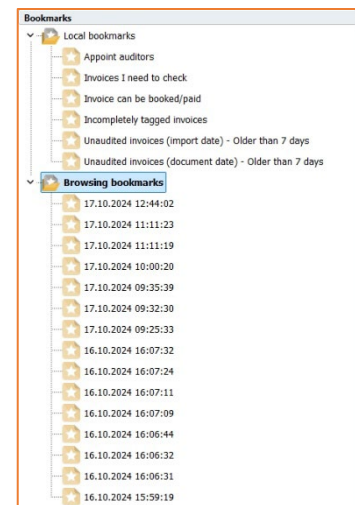
In the case shown above, these would be documents from an archive that have the *audited* and not the status *under_clarification* and not *booked/paid*.

g) Search history and Bookmarks

Your past search queries are saved. (History bookmarks) You can display these by selecting the corresponding panel below the archive tree. You will now see a tree in which your *bookmarks* are listed. You will find your search history in the *history bookmarks*. These *bookmarks* are initially labeled with the date and time they were created.

You can specify how many of your most recent search queries should be saved in the *Options and settings* and there on the *Search* tab, under *Max. Show* and set *history bookmarks*.

Local bookmarks can be created and removed by the users themselves.



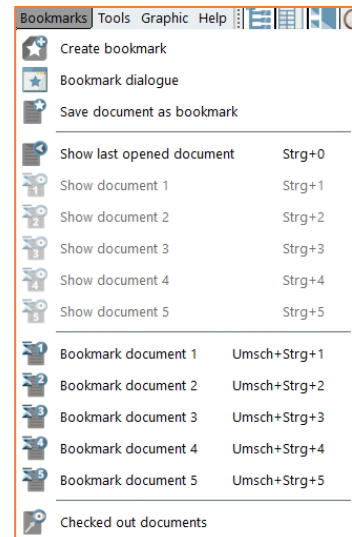
Tip: Select the name of the *bookmark* and then click on it again to change the name.

You can create a local bookmark by first entering the desired search query and then clicking on *Create bookmark* in the *Bookmarks menu*. A dialog box opens in which you can enter the name for this search favourite. Click on *OK* to save the new *bookmark*. Your bookmarks are available either by right-clicking on the archive where they are valid or via the corresponding

Bookmarks tab. It is also possible to save individual documents as bookmarks for quick access. These are then also displayed in the local bookmarks and can be given meaningful names.

Note: The search query contained in this bookmark can be combined as desired, i.e. it can contain all possible search options.

Up to five individual documents can also be *bookmarked* for quick access. To do this, select the menu item *Bookmark* and then *Bookmark document* with the desired number when you have called up the desired document. Alternatively, you can bookmark documents with the key combination *Ctrl+Shift+{1-5}* and call them up again with *Ctrl+{1-5}*. The application retains *remembered* documents even after a restart. The key combination *Ctrl+O* can also be used to call up the previous document at any time. An overview of all [key combinations](#) can be found in the [appendix](#).



Under *Checked out documents*, you can display a list of the documents you have checked out. Administrators can use the "All checked out documents" function to display a list of all relevant documents.

h) General search functions

For each search, you can set the maximum number of hits that you would like to be displayed. If this number is exceeded, the latest documents that meet the search conditions will be displayed in the results list.

You can use the Reset *button* (F6) to reset all entries that you have made in the search window. This deletes *all the* entries you have made in the *standard search*, the *full-text search*, the *status search* and the *additional field search*.

Use the blue left arrow to move backwards in your search history and the right arrow to move forwards (provided you are not already in the last query).



You can sort the *results list* according to your requirements. If a search has been carried out for a specific archive, its *additional fields* are displayed as columns to the right of the standard columns. You can view these by scrolling to the right or dragging the right edge of the list so that you can see more columns at the same time. The columns can be re-sorted by grabbing and dragging; clicking on the respective column header sorts the table according to the contents of this column.

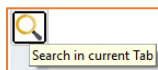
Tip: If you get a lot of hits in a search, you can narrow down the *search* further to get a more precise result. To do this, combine several words or word components as well as numbers (components) in the *full text search*. If required, you can also add other search options, e.g. a date range (entry date), one or more *additional fields* or *status buttons*.

i) Combined search

Example: All invoices with an invoice date between 01.06.2024 - 01.07.2024 from supplier X that have not yet been booked/paid but have been checked and have a gross amount ≥ 5000.00 .

Note: You will find further explanations and tips for quick and targeted searches in the DMS in the [appendix](#) of this user manual.

j) Search in current tab



Searching in the document: ☐ Exact search ☐ Whole words ☐ Continue search at beginning/end

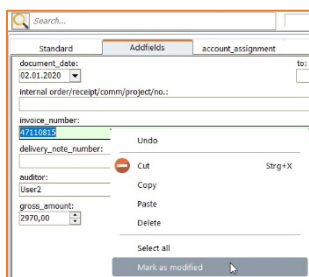


Here you have the option of performing a full text search in one of the adjacent tabs (preview, full text, history)

234119	3 button mouse with software, USB
221945	PC keyboard US layout, USB

k) Advanced search

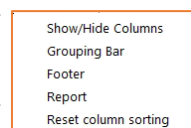
Regardless of the search method initially selected, the resulting hit list can be narrowed down further using an advanced search. All available search functions can be used for the advanced search. The first step is to carry out an initial search and, if there are "too many" hits, narrow down this search result using further search parameters.



Tip: If you want to narrow down the search further with an additional field value that is already displayed as a value in the additional field for a document after the initial search, you can activate this additional field including the value for the search. Right-click on the additional field that you want to use for the further search and then select *Mark as modified* in the context menu. Then click on the Search button or press the *Enter* key and you will search based on the initial hit list with the selected additional field.

5. Hit list

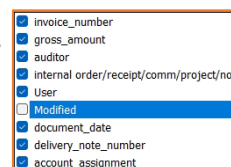
The hit list also offers you the option of narrowing down and/or sorting your searches. By right-clicking on one of the column headers in the hit list, you can individually select the columns displayed in the hit list and also access other useful functions which are briefly explained below.



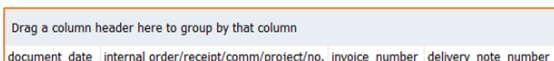
l) Show/hide columns

Select which of the columns assigned to the archive you would like to see in the hit list by selecting or deselecting them accordingly.

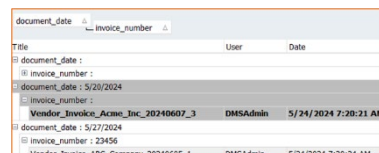
Note: You cannot hide the (import) date and the title.



m) Grouping bar

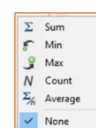


You can use drag-and-drop to specify the columns by which you want the hit list to be grouped.



n) Baseboard

If this is "activated", you can make the following settings for the respective column by right-clicking below a column in the hit list.



Note: In the options, you can set whether the entire column or only selected entries should be totaled.



Once you have made your setting for the corresponding column, it could look like this for the "Invoice amount" column, for example.

gross_amount
2.970,00
1.171,92
5.167,80
4.793,50
22.532,00
14.362,10
3.256,85
17.296,00
20.332,77

o) Report

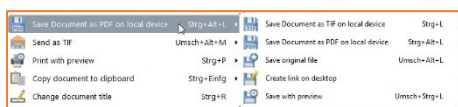
Creates a report of the hit list that you have received after a search.

p) Cancel column sorting

Cancels the set column sorting and resets it to the delivery status.

6. Save archived documents locally

There may be reasons why you want to save archived documents locally. This is possible (with the appropriate authorization) by selecting the documents to be saved in the bitfarm-Archiv GPL application and then right-clicking to select how they should be saved.



Tip: You can quickly save documents locally from the application using drag-and-drop. Simple drag-and-drop always saves the document as a PDF; if you hold down

the Ctrl key + drag-and-drop, you save the document in the format of the archived original file.

7. Zoom function and "dragging"

In the preview, you can zoom in and out of the document by turning the scroll wheel while holding down the Ctrl key. Simply turning the scroll wheel causes you to "scroll through" the preview of the document. You can change this default setting in the options, in which case you would zoom in and out of the document directly when turning the scroll wheel. By pressing and holding the left mouse button, the mouse symbol changes to a hand with which you can move your document page continuously in all directions.

8. Annotations (private and public)

You can add *public* and/or *private annotations* (i.e. all objects such as notes, stamps, etc.) to documents, provided you have the necessary permissions. The private annotations are only visible to you if you do not *release* them.

You can control the display of the annotations (public/private) on the respective document using the two buttons opposite.



Note: You can share your private annotations with selected employees. (Drop-Down)

9. Attaching objects (notes, highlighters, etc.) in the preview

In the preview, you can already use all *stamps* as well as various *pens*, *highlighters*, *notes*, *arrows*, *lines* and *text* with the help of the toolbar shown on the right. You can also change the shape of the objects in the *preview* or move them, edit default settings for the various tools and select text from the document directly via an *area OCR* and insert it into additional fields.

SALESPERSON	JOB	SHIPPING METHOD	SHIPPING TERMS	DELIVERY DATE
Carl Smith	47110815	XUB	EXPRESS	02/01/2012

SALESPERSON	JOB	SHIPPING METHOD	SHIPPING TERMS	DELIVERY DATE
Carl Smith	47110815	XUB	EXPRESS	02/01/2012

To mark text in this document with the *text marker*, select the highlighter tool by activating the relevant button. Then click in the

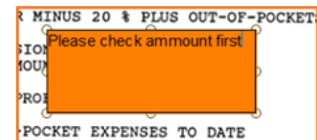
document and, holding down the mouse button, drag a box around the text to be marked.

When you release the mouse button, the highlighted area changes to the default highlighter color.

You essentially attach a *note* to your document in the same way. First, select the note tool. Then draw a rectangle of a suitable size for the desired text at the desired position in the document. When you release the mouse button, your

notepad appears, in which you can now enter your content.

TOTAL PROFESSIONAL FEE DUE
OUT-OF-POCKET EXPENSES TO DATE
LESS AMOUNT PREVIOUSLY BILLED
TOTAL OUT-OF-POCKET EXPENSES DUE



You can use *lines*, *arrows* and *pens* to underline, highlight or mark. Select the relevant tool and click on the point in the document where you want the *line/drawing* to start. The *pen* will draw as long as you keep the mouse button pressed. When you release the mouse pointer with the *line tool*, you draw a straight line until the next click. Double-click to complete the object.

The *text tool* can be used to insert *text elements* into the document. To do this, select the text tool and, if necessary, one of your preset text favorites. You can now draw a box, as already known from the notepad, and edit it as required by double-clicking in the text.


The *arrow cross*, which you will find in the toolbar below the arrow symbol, allows you to move objects, enlarge or reduce them or edit the text content. You can also use the *delete button* to delete a selected object.



Once you have activated the tool, click on the object that you want to change so that it is highlighted. It is now provided with *handles* that you can use to make it larger or smaller by clicking on the *handles* and dragging in the desired direction while holding down the mouse button. In the example shown, the object is enlarged or reduced by clicking on the *handle* in the bottom right-hand corner. If you double-click with the arrow cross activated, a cursor appears in the text field with which the text can be edited.


Please read this note until Friday, thanks.

To move an object, click in its area and hold down the mouse button. The mouse pointer is now displayed as a cross and you can drag the object to any position in the document.

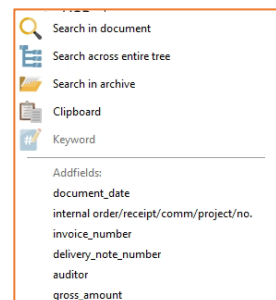
To edit the default settings for your objects, click on the gear icon in the tool-  bar.

Tip: Create your own stamps here, or adapt the preset annotations with the fonts, colors and ready-made texts to your individual needs.

Note: In order to apply annotations to a document, you must switch it to "*Edit mode*". Either by clicking on the corresponding button, by pressing the "F2" key or, if set in the *options*, by double-clicking on the document.

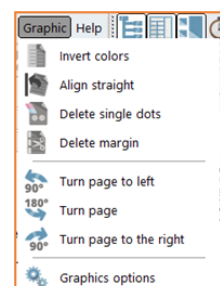
The *area OCR* allows you to quickly read out the content of the document in your pre- 

view and transfer it to existing *additional fields*, for example. To do this, after using the button in the toolbar, draw a frame around the text section to be copied. Then right-click in the selected area. Various options are now available to you in the following context menu as shown. For example, all additional fields in the relevant archive are displayed, from which you can select the one that is to be filled with the previously read text. The extracted text can also be saved as a keyword or transferred to the clipboard. Settings for this can be found under File - Options - Editor.




10. Graphic menu

Some options for editing documents after *importing* them into the archive are summarized in the *Graphics* menu. The changes can all be revised afterwards, if necessary, using the *Restore original document* function (*Tools* menu).



Note: You can also access the graphic options by clicking on the corresponding button in the annotations bar

q) Graphic options

You can access the options for objects both from the toolbar and via the *Graphics menu*, so that you can also make settings for *annotations* and *stamps* etc. in this  way.

r) Invert colors

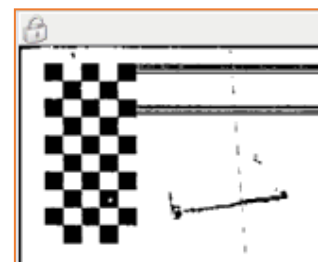
The *Invert colors* function replaces the colors of your document page with their opposite in the color space. This practically gives you a negative of the original image.

s) Align side straight

Especially when using *Auto Scan*, it can happen that one or more pages of a document have been imported crooked. To straighten these, you can use the *Straighten page* function.

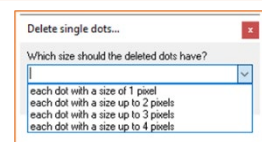
t) Remove individual points

If disturbing dots have been created on the document during scanning, you can easily remove them by clicking the *Remove individual dots* button in the *Graphics* menu. You will now be offered a drop-down menu from which you can select the size up to which the dots should be removed.



u) Remove border

Remove margin crops white margins of a document page from all sides to the first black dots or areas.



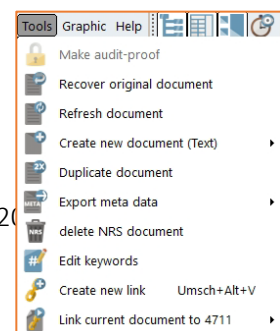
v) Turn page

You can *rotate* your document pages to the left, right by 90° or by 180°, a function that is particularly useful for unsorted document stacks or vertically scanned landscape formats.

11.Tools menu

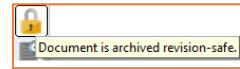
The *Tools* menu, like the *Graphics* menu, contains various functions.

w) Audit-proof filing



A document can no longer be changed from the moment it has been stored *in a revision-proof manner*. Although the *original file* can still be opened afterwards, it must be filed as a new document after changes have been made. With the appropriate authorization, documents that are *not* archived *in an audit-proof manner*, such as Office documents, can be made *audit-proof* in this way and therefore no longer changeable. The original file can then only be opened in read-only mode.

Note: You can tell whether a document is stored *in a revision-proof manner* or not by the "lock symbol" in the annotations bar. If this is grayed out, it is *not a revision-proof* document, otherwise it is golden and therefore a *revision-proof* document. If you are unsure, hold the mouse pointer over this symbol for a moment and a tooltip will give you the information. Incidentally, documents that are not audit-proof can also be stored *in an audit-proof manner* by clicking on this symbol, provided you have the appropriate authorization to do so.



Tip: In the following, we will be happy to provide you with more detailed information on our website on the topics of audit-proof archiving, GoBD, procedural documentation and everything that is important and must be observed in this context.

- [Audit-proof archiving](#)
- [GoBD](#)
- [E-mail archiving](#)
- [Digital archiving](#)
- [Process documentation](#)

x) Restore original document

You can use the *Restore original document* function to undo changes, such as *removing points* or *inverting* a page. Annotations are retained during this process.

y) Update document

If no *full text* or an incorrect *full text* has been created for a document, this function allows the document to be placed in the text recognition queue a second time in order to obtain a searchable *full text* after all.

Even if additional fields were not filled automatically and the cause of this has since been rectified on the server side, this can be rectified using this tool.

Note: It is not always possible to create a *full text* with this function. If a TIF file cannot be created for the document due to an unsupported file format, text recognition is not possible.

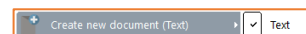
Scans of poor image quality can also be the cause of no or incorrect *full text*. If necessary, ask your administrator.

z) Create new document (text)

Use this function to create a new document, a text file, with a blank, white page. This can be used, for example, to store notes that are independent of documents in the archive or, if set, to check out and edit the original file.

aa) Duplicate document

You can create a duplicate of your document. If an original file exists, this will also be copied. However, annotations are not copied.



bb) Export metadata

You can save the data from documents that you have selected in the hit list as a CSV, Excel or OpenOffice file.

A	B	C	D	E	F	G
docname	docdate	commission number	invoice number	invoice date	ammount	approved
Invoice Steel Inc	22.01.2019	35723	3457	15.11.2011	162,56	george.gray 23.01.2019
Invoice Hardware Solutions	15.04.2018	76512	8734	07.02.2011	8965,34	
Invoice Gambit	12.12.2020	43789	3216	25.10.2010	34,99	

Note: If exporting the metadata, which is also accessible via the context menu, is greyed out, you do not have the authorization to do so, which can only be granted by the DMS administrator (dmsadmin).

cc) Delete NRS document

This function is only active if you have the authorization to delete documents in the relevant archive. Deletion using this function is only possible for non-revision-proof (NRS) documents. You can find other deletion functions (also for RS documents) in the DLM area or by moving them to the recycle bin.

Note: The configuration of deletion periods via the [document lifecycle management](#) integrated in bitfarm-Archiv GPL is the sole responsibility of the DMS administrator.

dd) Edit keywords

This is one of the ways in which you can edit the keywords stored for a document or store additional keywords for this document.

ee) Create new link

If you want to add a document to a link manually, this is one way to do this. A link is always useful if a content-related reference is to be established between several documents, e.g. the affiliation to a process or a file.

These can then be displayed collectively at any time via the link.

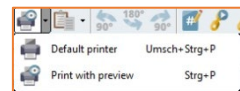
Example: All documents for a specific order number, file number, chassis number, project number...

ff) Link current document with ...

Adds a document to the (or one of the) last used link(s) (selection).

12. Print

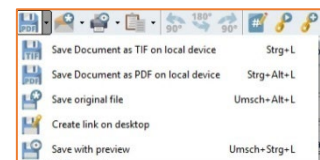
To print the current document, simply click on the corresponding button in the toolbar. If you simply click on the button, the print setting that was last selected in the dropdown that opens when you click on the arrow is used.



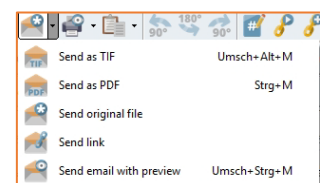
Default printer prints using the printer selected in the options and when *printing with preview*, options are offered to edit the layout and display of the print page and, if necessary, to select a printer other than the stored default printer.

13. Send documents and save/use them outside of bitfarm-Archiv

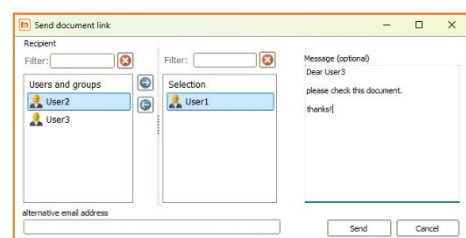
To save or send one or more documents or the corresponding original files externally, right-click on the preview of the document and select the required option in the context menu or click on the corresponding button in the toolbar.



Note: The options *Save with preview* or *Send email with preview* offer options for editing the layout and display, for example. You also have the option of combining several previously selected documents into one document.



The *Send link* option allows you to send the DocLink (link via which the document can be accessed from the sys-

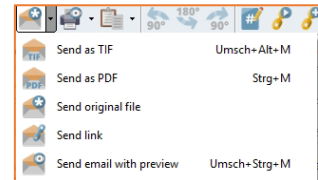


tem) by e-mail.

Note: Of course, only recipients who have access to the respective archive can use a link!

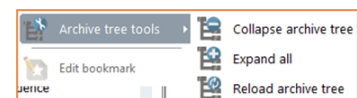
In this case, no e-mail will open, but a dialog box will appear asking you to select the desired recipient from the list of stored users or to enter a different e-mail address. You can also write a text message. The e-mail is then automatically generated and sent after confirmation by clicking on *Send*.

If you want to save several documents from different search results or send them by e-mail, simply select the relevant documents in the hit list, then right-click and select *Mark documents* in the context menu that opens. The number of marked documents is displayed in brackets behind it. If you have all the documents you want to save or send, then select the desired action, *send or save*. If you want to create a new document collection, e.g. for sending emails, you should in most cases *keep* the *collection of documents* you have already *marked*, unless these are also to be part of your new collection.



14. Tree tools

Right-click on an archive in the archive tree to display the so-called *tree tools*. *Collapse all* collapses the entire archive tree, while *expand all* expands the entire tree with all storage locations and all archives.

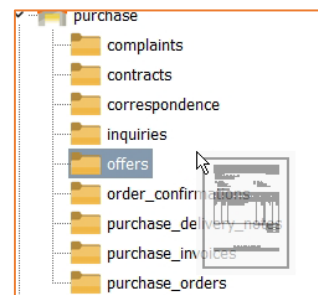


You can use *Reload tree* to reload the tree, e.g. if a new archive has been created in the meantime that is not yet displayed.

15. Moving of documents within the archive

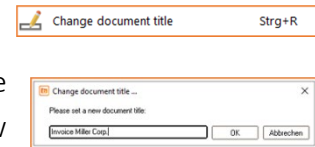
Documents can easily be moved from one *archive* to another using *drag-and-drop*. To do this, simply click on the document(s) to be moved and drag them to the desired archive in the *archive tree* while holding down the mouse button.

Note: If you move documents while holding down the Shift key, you "jump" directly to the selected archive with the documents. However, moving only works if you have the appropriate authorizations. If there are any problems, please contact your administrator.



16. Renaming documents

Right-click on the preview of the document to be renamed. It does not matter whether you click on the document preview or the document in the hit list. Now select *Change document title* in the context menu. A window then opens in which you can enter the new title of the document. Then click on *OK*.



You will now see the new title in the results list. The terms used have also been saved as keywords for this document.

Tip: The document name can also be changed with the key combination *Ctrl + R*.

Document names are a way of organizing and sorting the results list of a search more clearly. The additional fields of an archive are displayed as columns in the results list, which you can arrange in the display sequence by moving them around so that it makes sense for you. By clicking on the respective column header, the hit list is sorted in ascending or descending order.

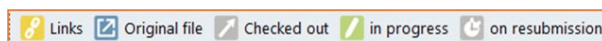
Title	Date
Vendor_Invoice_ABC_Company_20240605_1	5/24/2024 7:20:24 AM
Vendor_Invoice_Acme_Inc_20240607_3	5/24/2024 7:20:21 AM
Vendor_Invoice_Alpha_Industries_20240617_13	5/24/2024 7:20:18 AM
Vendor_Invoice_Alpha_Solutions_20240709_35	5/24/2024 7:20:16 AM
Vendor_Invoice_Apex_Systems_20240613_9	5/24/2024 7:20:13 AM
Vendor_Invoice_Beta_Innovations_20240618_14	5/24/2024 7:20:10 AM
Vendor_Invoice_Beta_Technologies_20240710_36	5/24/2024 7:20:07 AM
Vendor_Invoice_Chi_Innovations_20240708_32	5/24/2024 7:20:04 AM
Vendor_Invoice_Delta_Innovations_20240712_38	5/24/2024 7:20:01 AM
Vendor_Invoice_Delta_Solutions_20240615_11	5/24/2024 7:19:58 AM
Vendor_Invoice_Epsilon_Enterprises_20240620_16	5/24/2024 7:19:56 AM
Vendor_Invoice_Epsilon_Systems_20240713_39	5/24/2024 7:19:53 AM
Vendor_Invoice_Fta_Solutions_20240715_41	5/24/2024 7:19:50 AM
Vendor_Invoice_Gamma_Industries_20240711_17	5/24/2024 7:19:47 AM
Vendor_Invoice_Gamma_Systems_20240619_15	5/24/2024 7:19:44 AM
Vendor_Invoice_Global_Enterprises_20240608_4	5/24/2024 7:19:41 AM
Vendor_Invoice_Iota_Industries_20240623_19	5/24/2024 7:19:38 AM
Vendor_Invoice_Iota_Industries_20240717_43	5/24/2024 7:19:36 AM
Vendor_Invoice_Kappa_Innovations_20240624_20	5/24/2024 7:19:33 AM
Vendor_Invoice_Kappa_Innovations_20240718_44	5/24/2024 7:19:30 AM
Vendor_Invoice_Lambda_Systems_20240625_21	5/24/2024 7:19:27 AM
Vendor_Invoice_Lambda_Systems_20240716_45	5/24/2024 7:19:24 AM
Vendor_Invoice_Mu_Enterprises_20240626_22	5/24/2024 7:19:21 AM
Vendor_Invoice_Mu_Enterprises_20240720_46	5/24/2024 7:19:18 AM
Vendor_Invoice_Nexus_Innovations_20240612_8	5/24/2024 7:19:16 AM
1 / 49	<

17. Status

You will find several colored buttons above the preview of your document. These buttons provide you with some document information and also offer you the option of editing the document or some properties, e.g. as part of the workflow.

gg) Standard status fields

Five status fields are available as standard for every document in all your archives: *Links*, *Original file*, *Checked out*, *In progress* and *On resubmission*.



The meanings of the colors and the operation of the switches:

The yellow color of the *Links* button indicates that links are available. If this is not the case, the box is not colored. Clicking on the button displays the link(s) and clicking on the desired link calls up all associated documents across all archives.

If the *Original file* button is blue, this means that an original file exists for this document, which is downloaded from your DMS server to the client by left-clicking on this button and opened in the application that is locally linked to this file extension. The bitfarm-Archiv application displays TIF files directly in the viewer, i.e. this is the original file that is displayed there. For other archived files, such as Office documents, e-mails, PDFs, you will see a black and white archive TIF rendered by the DMS server in the viewer, so that loading times remain short (small file size) and you do not necessarily have to open the original file to see the required information. However, it can of course also be useful to be able to open the original file. For example, an archived e-mail will then open in your local mail client, even if it has already been deleted in your mail client, and you can reply, forward and access all attachments etc. as usual.

Note: The info bar at the bottom of the application provides you with some information about the document you are currently viewing, including the file type of the archived original file.

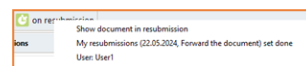
Logged in as: User1 | Profile: bitfarm36 | Server: VMGPL36 | ID: 28/25 | Info: Archive: purchase_invoices - Document: invoice - Date: 17.10.2024 - Size: 151 KB - Filetype: docx

By clicking on the status *In progress*, you can, for example, add annotations and change additional field values for a document. Once you have made the changes, you can save them or discard them by clicking on *Cancel* or by pressing the ESC key.




Note: There are several ways to set a document to edit. Either click on *Edit* to the left of the Search button or press the F2 key. If the option is set accordingly in the *options and settings*, double-clicking on the document is also sufficient, either in the hit list or in the preview.



If the status on resubmission is green, this means that the document is in someone's [resubmission list](#). By right-clicking or hovering the mouse pointer over this status, you can see which employee or employees have this document in the resubmission list for processing.



hh) Individual status fields

In addition to the usual status fields, the administrator can create special status fields for each archive. These can be used both  **audited**  **under clarification**  **booked/paid** in workflows and to pass on information about a document. In the example shown, it can be seen that checking and approval have taken place, but the following posting is still pending. If documents are assigned to an automated workflow, which must be defined, the document in question is in the resubmission of the person responsible for the corresponding workflow step. This status should

only be changed by this person, which can be ensured by setting the appropriate authorization.

Note: Each status has two states, true or false or set or not set. If a status is displayed as "greyed out", this means that you do not have the authorization to assign this status to a document. However, you can use this status for searching.

18. Show document

By right-clicking on the *preview* of a document, you can copy the *GDocID* or the *document link* to your clipboard. You can paste this clipboard content into almost all applications

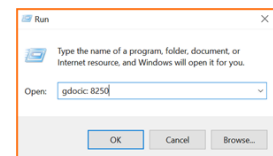
ii) Use of the Doklink in HTML-enabled applications

When copying a document link into a Word document or an e-mail, for example, it is displayed with the title of the document, as in the image. With *Ctrl + click*, the document can now be called up directly in bitfarm-Archiv, provided that the authorization to access the archive in question is given.



Note: The client installer of bitfarm-Archiv GPL version adds corresponding information to the registry so that your client can resolve these links and start the application of bitfarm-Archiv DMS by clicking on this link and display the document if the user logged into the DMS has the corresponding authorization.

To go directly to a specific document whose *GDocID* you know, open the input window or *Execute* in the Start menu and enter "*gdocid:*" and the *respective ID* (here "8250") as a parameter. *Enter* now calls up the *bitfarm-Archiv GPL* application and displays the document you are looking for if you have the authorization to display it.

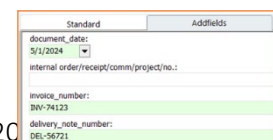


Tip: The application can be started with *parameters* to either display the desired document directly by passing the *GDocID* or certain search parameters, so that a search with corresponding parameters is triggered directly when bitfarm-Archiv GPL is started. This so-called programmatic call is described in the interface documentation.

19. Filling additional fields

jj) Additional fields tab

To fill *additional fields* in a document, select the document in question, set it to *editing* and then switch to the *Additional fields* tab *der*. Here

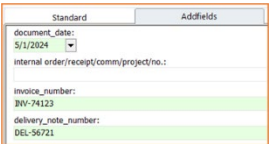


you can now change or add to the contents of the fields. Then click on *Save* to save the additional field contents for this document in the database.

For recurring additional field content, the *keywording help* can be used for support. You can activate this via the *context menu* by *right-clicking* on an additional field. It is used as follows:

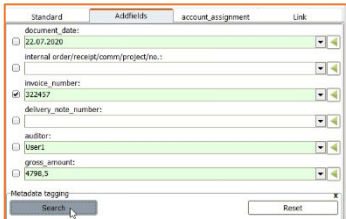
- The small arrow next to an additional field is intended for searching within the existing entries in this field.

There are two ways of doing this: A search term or part of the search term is entered, then the arrow is clicked and all possible entries are offered in a dropdown.



If the field is empty, the autocomplete function is activated the moment the arrow is turned over.

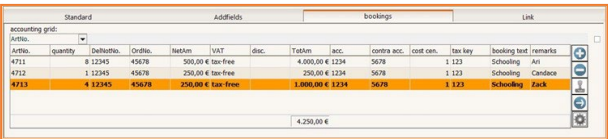
Tip: As certain entries in individual additional fields are often accompanied by corresponding entries in other additional fields, you can search for suitable entries by ticking the box next to an additional field in which you have already made the required entry and then clicking on the "Search" field below. The matching entries are now displayed in the other additional fields or offered for selection via dropdown. Several fields can also be filled and checked to improve the result of the other fields if necessary.



Note: There are also options for automatically indexing documents. For example, recurring invoices from the same supplier. Contact your administrator about this. However, when planning the DMS, always consider which fields are really needed. Thanks to the comprehensive search methods, such as the full text search, granular keywording is often not necessary.

kk) Additional field - Grid

A new data type was introduced with bitfarm-Archiv GPL version 3.6.2. The administrator of the DMS can now create additional fields of the *Grid* type and make them available to users in different archives for different scenarios. This *grid* can then be displayed



accounting grid:	ArtNo	quantity	DelNo	OrdNo	NetAm	VAT	disc	TotAm	acc	contra acc	cost cen	tax key	booking text	remarks
4711	8	12345	45678		500,00 €	tax-free		4.000,00 €	1234	5678	1	123	Schooling	Ari
4712	1	12345	45678		250,00 €	tax-free		250,00 €	1234	5678	1	123	Schooling	Candace
4713	4	12345	45678		250,00 €	tax-free		1.000,00 €	1234	5678	1	123	Schooling	Zack

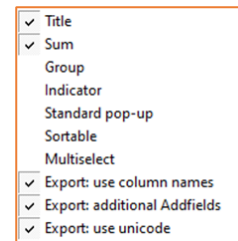


ArtNo	quantity	DelNo	OrdNo	NetAm	VAT	disc	TotAm	acc	contra acc	cost cen	tax key	booking text	remarks
4711	8	12345	45678	500,00 €	tax-free		4.000,00 €	1234	5678	1	123	Schooling	Ari
4712	1	12345	45678	250,00 €	tax-free		250,00 €	1234	5678	1	123	Schooling	Candace
4713	4	12345	45678	250,00 €	tax-free		1.000,00 €	1234	5678	1	123	Schooling	Zack

as an independent tab next to the "normal" additional fields with a suitable name, or with the "normal" additional fields and is used for the quick and clear indexing of documents. In the case of invoices, for example, this can be used to record account assignment-relevant information, including that of split postings, and to export this at a later date if necessary and/or to apply it to the document as an image stamp.

Note: Setting values in the grid columns or stamping the values entered there on the document also requires that you edit them either by clicking on *Edit* or by pressing the *F2* key.

By clicking on the "+" sign, a row is added to the *grid*, which can then be edited accordingly. Click in a cell that you want to edit and make your entry. Pressing the Enter key completes the entry of a cell in the *grid* and automatically takes you to the next cell. Whether you are provided with selection values or whether the result of a calculation of existing cell values is automatically performed in some cells depends on the configuration



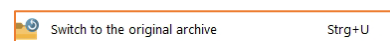
made by your DMS administrator. The settings that you can access by clicking on the gear icon are ad hoc settings. It is possible that some of them are already selected, but this is a setting that the DMS administrator has defined and can only be changed by a user on an ad hoc basis and for the moment.

Example: You do not want to stamp the entire content of the grid on the document or perhaps simply do not want to have it in a stamp. Then select *Multiselect*. Now only the row that you have selected in the *grid* will be stamped.

Note: The color of the stamp is also defined by the administrator in the *grid* configuration.

20. Switch to the original archive

Occasionally, for example if you want to view the additional field contents of a document, it is necessary to jump to the original archive of a document found after a search across several archives (e.g. to display additional fields) without having to search for the document again. You can find the option to do this by right-clicking in the context menu or simply by pressing *Ctrl + u*.



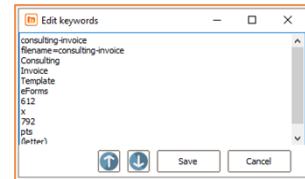
Note: The other documents from the results list of the previous search will no longer be displayed after this change! Unless you also select them (e.g. with *Ctrl + a*). Then all documents are displayed that come from the same archive as the first selected document!

21. Subsequent keywording

To edit the *keywords* stored for a document, click on the button shown on the left in the *toolbar*.



A window will open showing you the *keywords* associated with the respective document and the option to change them.



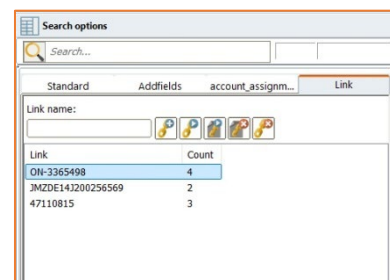
Note: Keywords are defined search terms for a document. In situations where a search via the full text of a document is not possible or useful, for example when archiving handwritten documents, but also in addition to the full text search, the so-called keywording can be used. Just as when changing additional fields or adding notes, you must first take the document into "Edit" (F2) and can then change the keywords.

22. Working with links

II) Creating a new link

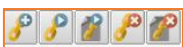
The easiest way to create a *new shortcut* at is to enter it in the input field above the shortcut list in the *Standard* tab *or, depending on the setting*, in the *Shortcut* tab under the search options and add it to the list by pressing the Enter key.

Another way to create a link is to right-click on the document (whether in the *preview* or the *hit list* is irrelevant here) and then select *Create new link*.



In the dialog box that appears, you can define the title of the *link* and save it by clicking *OK*.

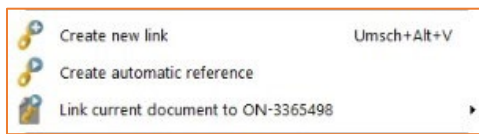
You can also create or remove a *shortcut* via the *toolbar*.



Note: If the meaning of the symbols is unclear to you, hover the mouse pointer over a symbol for a moment and a tooltip will appear with a clear explanation of the symbol.

Tip: Use the *Shift* or *Ctrl* key to select several documents if you want to add a new *link* to them at the same time.

mm) Add document to the last created link




To link a document directly to a *link* you have just created, right-click on the document and select *Link current document with <value_of_link>* from the menu that then pops up. The same process can also

be carried out using a button in the *toolbar*.

Tip: When planning the DMS, ensure that unique identifiers are used for links. If, for example, the number ranges that you want to use for linking overlap, use different letters in front of them to ensure uniqueness.

nn) Author references

The author reference is another way of linking documents with each other. The link is generated automatically by the DMS. The title of an *author reference* consists of the name *AutoRef*, followed by the date and time of creation.

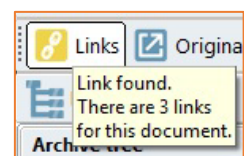
Just as you create new *links*, you also create new *author references*. After right-clicking  on the document, first select *Create autoreference* or click on the corresponding button in the application toolbar.

and *Add to link* for further documents. This selects the last *author reference* used/created. You can then proceed with *author references* in the same way as with other *links*.

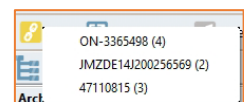
Tip: Use an *author reference* to quickly link documents with each other if the name of the link is not important to you and you do not need it for an initial search query. For example, search for full text features or additional field values and then click on the possible *author reference* of a document to display all linked documents.

oo) View existing links

Whether *links* exist for a document can be determined at first glance by the status of the *Links* status field. If the field is highlighted in yellow, *links* exist. If you move the mouse over the button, you can see how many *links* exist to the document.



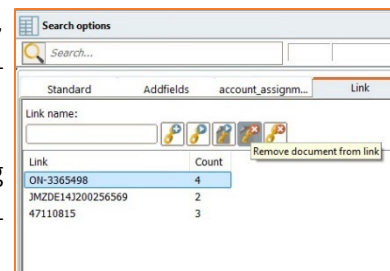
By clicking on the button, a list of all existing *links* to this document opens with names so that you can select one of them to display all the documents linked to it. You can also call up and select the linked documents using the button in the link menu.



pp) Remove links

To remove a *link* from a document or delete it completely, select the one you want to remove and then click on the corresponding icon in the *Links* tab above.

Note: The administrator can delete a complete link by clicking on the grayed-out area in the diagram. Users who are not administrators cannot use this button.



23. Resubmission functions

qq) Call up resubmission

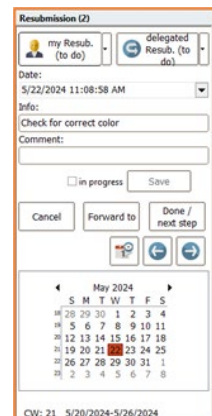
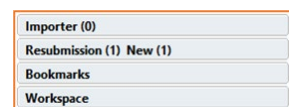
You can use the *resubmission functions* to control the *workflow* of your documents. You can open your resubmission list by double-clicking on the corresponding panel below the archive tree or by pressing the key combination "Alt + 3". Even if the panel is "closed", you will see in brackets how many resubmissions you have and how many of them are new, i.e. have not yet been seen by you.

If you have opened the resubmission list, the documents in it are displayed in the hit list. You can see your task with this document in the *Info* field for each document. Once you have completed your task, click on *Done / Continue* and the task disappears.

Note: Continue refers to cascaded tasks, i.e. tasks connected in series, in which several people may be involved. However, it is not clear whether this is the case for a given task. The workflow logic programmed by the administrator decides whether a task is simply "finished" or whether further tasks are triggered by clicking on Finish/Continue.

Note: In the "Options - Resubmission" menu, you can define which standard columns you want to be displayed in the hit list for the documents that are in your resubmission.

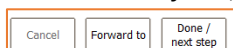
Note: There are different reasons for receiving a task. On the one hand, a workflow set up by the administrator can assign documents that fulfill defined conditions to an employee as a task. On the other hand, an employee may also have sent you a document manually as a task.



Type	Deadline	Archive	Title	Info	Comment
	6/5/2024 11:2		purchase_invo Vendor_Invoice	Please book/p	Urgent!
	6/5/2024 11:29		purchase_invo Vendor_Invoice	check new docu	forward the doc
	6/5/2024 11:28		purchase_invo Vendor_Invoice	Check for correc	Needs to be don

The documents in the resubmission hit list are displayed in different colors. If a document is highlighted in yellow, this means that it currently has the status *in progress*. The red marking indicates that the specified processing period for the document in question has been exceeded.

By clicking on an entry in the hit list, you will see the corresponding document and can edit it according to your specifications. Once you have finished editing the document, click on *Done / Continue*. If you select *In progress*, the document is highlighted in yellow in the list, *Done / Continue* removes the document from your *resubmission list* and forwards it to the next station in the *workflow*, *Cancel* cancels the *workflow* and also removes the document from the

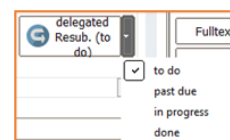


Note: The *Cancel* option is only available if you have been authorized to cancel the *workflow* for documents in the relevant archive!

Click on *CW* to display the resubmissions for the current calendar week. You can use the arrow buttons to move forwards or backwards in the calendar weeks. You can see which calendar week is currently displayed in the title bar of the resubmission window. A *Comment* field is added to the resubmission/task list, which can be filled with free text by the user. The field also appears as a column in the list so that it can be sorted.

Note: If you select the *Resubmission* tab, you can save frequently used *resubmission options* in the *options*, i.e. the settings for resubmissions to users to whom you regularly delegate documents with the same specifications, as favorites.

Clicking on *Delegated Resubmission* shows you the list of documents that you have delegated to other bitfarm users for processing or for which you have been entered as a controller in an automated workflow. *Right-click* on delegated resubmission to display the hits according to your selection.



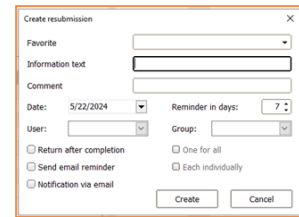
This gives you a precise overview of the status of the documents that you have transferred to another user for processing as part of a *workflow* at .

Note: Here too, you are only allowed to cancel the workflow if you have the corresponding authorizations in the relevant archive.

Documents can also be forwarded or delegated to other employees in the list of delegated resubmissions and returned after completion if desired.

rr) Create resubmission

A *resubmission* for a document is created by right-clicking on the document and selecting *Create resubmission*. A dialog box then appears in which you can make settings for editing the document and, if necessary, enter a short message to the recipient(s).



You can also set whether (in the case of delegated resubmission) the document should be returned to you after completion and whether a reminder mail should be sent if necessary. The reminder email is sent to the processor and controller of the task as soon as it is "overdue". In the event that you have created favorites for "quick distribution" (see [Tip: Resubmission](#))

Note: The server must also be configured accordingly for the sending of reminder emails to work. Ask your administrator about this if necessary.

You can also set the resubmission date and the date for the reminder and specify whether the document is only sent to one person or to a group for processing. When forwarding to a group, you can also set as a condition whether the document must be processed by each individual member of the group (*Everyone individually*) or whether completion by one member of the group (*One for all*) is sufficient.

Note: If you select several individual users, they will be combined internally into a temporary group so that you can also use the *One for all* or *Each individually* option.

Tip: If you do not select an editor, the resubmission is automatically created for the user who creates it.

If you have resubmission favorites, these will be displayed as shown below and can be used to quickly distribute documents.



Note: Complex, cascaded workflows with several stations/consecutive steps can only be set up by the administrator and are described in the system manual.

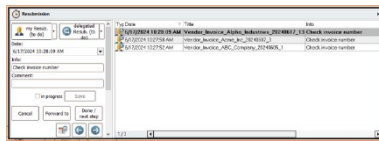
ss) Undock resubmission



Resubmission in a separate window

If you work a lot with the resubmission list, it can be practical to undock it and have it open as a separate window on a second screen, for example. Clicking on

an entry displays the associated document in the viewer. You can dock and undock the re-submission list using the button.



24. History

A unique *history* is written for each archived document from the time of archiving. Clicking on the *History* tab on the right-hand side of the preview shows you all the actions performed on the document in question to date, including the date, time and user who made the change or addition. Clicking on the column header allows you to sort the entries in ascending or descending order.

Date	User	Action
18.10.2024 12:18:31	User1	Resubmission Please contact the customer and make an appointment, continued
18.10.2024 12:15:24	DMSAdmin	Resubmission Please contact the customer and make an appointment, created, options =
18.10.2024 12:15:24	DMSAdmin	Resubmission Please contact the customer and make an appointment, created, date = 2024-10-18
18.10.2024 12:15:24	DMSAdmin	Resubmission Please contact the customer and make an appointment, created for user User1

Note: If you are unable to view the *history*, you have not been granted authorization to do so. If in doubt, please contact your DMS administrator.

25. Comments

Information about a document can not only be placed on the document in the form of annotations (notes, free text, other graphic elements) or saved as keywords and additional fields. The *Comments* function offers the option of saving text that can be sorted by user in chronological order with the document in the database. You call up the discussion view via the button to the right of the preview. If this is colored orange, as in the image, a discussion already exists.

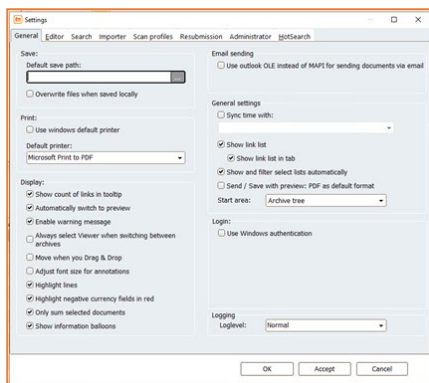
Date	User	Comment
18.10.2024 12:22:42	User1	I would like to discuss this document
18.10.2024 12:24:01	DMSAdmin	Oh yes, that's what I want too.

Note: If you do not have this switch, you do not have the authorization to open or edit discussions.

26. bitfarm-Archiv GPL - Options

You can make various settings for the display and function of your bitfarm-Archiv GPL application in the *File* menu under *Options*.

tt) General" tab



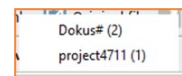
Under the *General* tab, you can configure the bitfarm-Archiv GPL application to suit your working habits.

Under *Default location for saving*, select a folder in which the documents are then automatically saved using the *local storage functions*, unless you want to manually select your own storage location each time you save documents from the application.

If you uncheck *Use Windows default printer*, you can set an alternative printer as the default for printouts in the selec-

tion field above.

If the option *Show number of links in tooltip* is checked, the links of this document and the number of linked documents with the respective link in round brackets are displayed after clicking on the *Links status*. By clicking on a link, all documents belonging to this link are displayed across all archives.



Note: The number of documents displayed in brackets for the respective link may be higher than the number of documents returned after your search using this link. If this is the case, it may be due to the fact that there are documents with this link that are located in archives to which you have no authorization.

Automatically switch to preview means that when you click on a new document, the preview is always displayed first, even if the full text or the history was called up for the last document.

Enable *warning window* means that notifications are not displayed in the status bar of the application, but a pop-up informs you for a brief moment about certain actions that you have performed. In this case, a document was packed as a PDF attachment in an outgoing email.



Moving with drag-and-drop from the Explorer means that when importing from the Explorer using "simple drag-and-drop", the document is moved, i.e. is no longer available in the source directory.

Tip: If you hold down the Ctrl key while dragging and dropping, only a copy of the document will be imported.

Highlighting lines in multiple colors may make the hit list in the application a little clearer for you, as every second line is highlighted in color.

Highlighting negative currency fields in red means that the negative amount in a currency field is displayed in red, both in the respective additional field and in the hit list.

Sum only selected documents means that if you have set Σ Sum in the footer of the hit list, only documents selected in the hit list are summed. Otherwise, the entire column is always totaled.

If you use Outlook to send emails, you can activate *Outlook OLE instead of MAPI when sending emails*. This has the advantage that you can continue working in the application even if the mail has not yet been sent.

Under *Synchronize time with*, a local computer can be selected whose computer time is then adopted in the application.

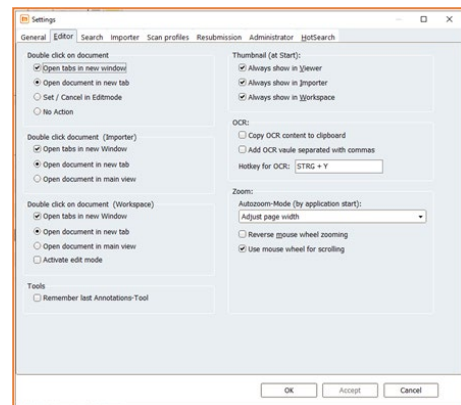
uu) Editor tab


You can specify whether and in which program components you would like a thumbnail view of the documents to be displayed in addition to the preview. The thumbnail view can, for example, give you quicker information about the page on which a note was written, as this is indicated by the corresponding display in the thumbnail view.

In the *Double-click on document* section, you can set how the application should behave when you double-click on a document, both for documents in the "normal" viewer view and for documents in the importer and workspace view.

Tip: Here you can create an additional option to set a document to "Edit status" in order to quickly add notes or edit additional field values.

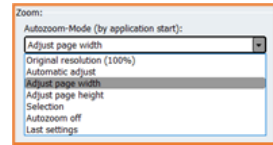
If the option *OCR automatically in clipboard* is activated, the text that was determined via the range OCR is copied to the clipboard. The option *Add values with semicolon for OCR* means that you can copy additional values into the same additional field via the range OCR, which are then separated by semicolons, e.g. if you want to store several order numbers for a document.



You can use *the hotkey for OCR* to activate the area OCR, which you can also activate by  clicking on the corresponding button.

The setting selected in Autozoom mode affects the display of the preview. You can make different settings here.

Note: Select the *last user setting* and the zoom factor will be set as you previously set when the application is restarted.



As a rule, the preview zooms into the image when you turn the mouse wheel forwards. If you prefer the opposite effect, set this with *Reverse mouse wheel zoom direction*.

If you would like to navigate through the pages of a document using the scroll wheel of your mouse, you can set this using the *Use mouse wheel for scrolling* option.

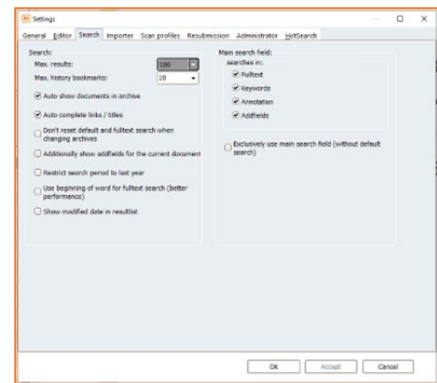
Note: If you have activated this option and want to zoom into the preview of the document, you must press *Ctrl + mouse wheel*.

vv) Search tab

With *Max. Show hits*: Select the *maximum number of hits* to be displayed in the drop-down menu. A small value, e.g. 50, speeds up the search.

You can set how many of your last search queries should be displayed as history bookmarks under *Max. Show history bookmarks*.

If you would like the latest documents in an archive to be displayed immediately when you click on it without having formulated a search query in advance, select the option *Automatically display the documents in the archive*. The latest documents in the respective archive will then be displayed.



Autocomplete shortcuts / titles offers you possible existing shortcuts that begin with these letters when you fill in the shortcut search field. The same applies to the search for titles if you set the search field to *Title* in the standard search. If you do not use this function, it may be useful to deactivate it in order to avoid extended start times, which can be caused by loading a longer shortcut list.

If you want the search terms from the last search to be retained when changing archives, select *Do not reset standard and full-text searches when changing archives*.

The option *Show additional fields of the document additionally* has the effect that even with a warehouse-wide search or a link search, where documents from different archives are

displayed in case of doubt, their individual additional fields are also always displayed, which can be very different for each archive.

Restricting the search period to the last year has the same effect. Only documents from the last year are displayed. Assuming you are carrying out a search query for all documents relating to a specific client number, customer number or similar, it may make sense to restrict the search period to the last year. This also speeds up the search function considerably for large archives.

Use start of word in full text search means that when you perform a full text search for document number 123456, no documents are displayed where the full text contains x123456. This option therefore limits the number of hits in case of doubt and also shortens the search time.

Show modification date in the hit list adds a *modification date* column to the [hit list](#), in which the date and time of the last change to the document is displayed.

If the *location marker* is activated, the hits returned by the full text search are marked in the preview of the document.

Note: Different search terms are marked in the preview by different colored frames around the respective locations. In the `scripts.ini`, which is located in the bitfarm-Archiv program directory, you can set for which files the OCR should create an XML, which is required for this location marking. You can navigate through the locations by pressing the F3 key.

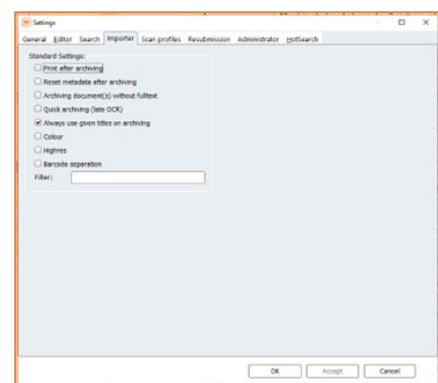
You can select which search is to be carried out via the *general search field* by selecting the corresponding checkbox. *Full text*, *keywords*, *annotations* and *additional fields* are available here.

Note: If you have selected the option *Use general search field exclusively (without standard search)*, any items you have entered in the standard search will not be taken into account.

ww) Importer tab

Here you can make some settings that affect the documents that are archived via the importer.

- *Print document after archiving* would immediately print the document archived via the *importer* on the standard printer.



Note: This function is only available for TIFs, as no preview has been generated for another original file at this early stage.

- *Reset entries after archiving*, clears the entries you have made after each archived document. This makes sense in most cases because different documents do not usually receive the same metadata. For this reason, this is also the default setting.
- *Archiving documents without OCR* can be useful if, for example, you are archiving a number of photos where it would be unnecessary for the text recognition to start first only to discover that there is no full text.
- The *Fast archiving (late OCR)* switch means that the document is initially only available as an image without full text, but with any metadata entered and therefore very quickly. OCR is then carried out afterwards, when the DMS server is idle.

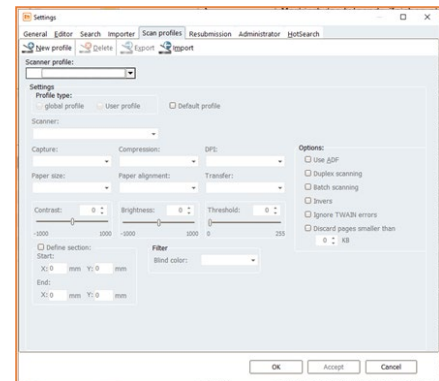
Please note: These documents are not automatically indexed or sorted.

- *Always use title when archiving* controls the naming of documents. If the option is set, file names or, in the case of emails, the subject are used as document titles. The set titles are displayed in black below the document and can still be adjusted (F2 / Return). If the option is not set, no titles are assigned in the importer. This means that document titles can be set by rules as they pass through the server. Nevertheless, the file name and subject are displayed in gray below the document. They are adopted as titles when you switch to edit mode and back again (F2 / Return).
- *Color*: By default, all documents are archived in color, i.e. colored previews are displayed in the viewer. The option can be changed on a case-by-case basis when archiving. The next time the document is archived, the default set here will be active again.
- *High-resolution*: As with the *Color* option, the default behavior for the resolution of the previews is defined here.
- *Barcode separation*: Activates barcode recognition and separation when passing through the server. Same behavior as filter: *barcodemerge*.
- Optionally, you can enter *filters* that automatically perform standard processes that must always take place for the selected document type, e.g. (rotate, invert, etc.). Barcode recognition is activated via *barcodemerge*.

xx) Scan profiles tab

If you have access to a scanner that has a TWAIN interface, e.g. a document scanner, you can create scan profiles here so that you can use them via the *Importer tab*.

bitfarm strongly recommends that you set the compression to CCITT 4 and 300 DPI for good OCR with a small file size, black / white as the standard profile. If necessary, you can also make fine adjustments to the contrast and brightness here if the scan result is not good enough in this respect. Document scanners usually have the option of a color dropout. This means that a so-called blind color can be defined. Frequently difficult documents are, for example, delivery bills, third copy, pink, yellow or other colored paper. The background color can then be filtered out using the corresponding setting so that the archived document in the DMS has a white background with black lettering and thus the best possible OCR can take place. If the scanner for which you are setting up the profile has an automatic document feeder, check the *Use ADF* (automatic document feeder) box. It is advisable to set up a standard profile that scans simplex, as this usually applies to the majority of documents and you do not want to capture and archive the supplier's terms and conditions on the back of invoices, for example. However, as there are also documents that contain relevant information on the reverse side, it is also advisable to set up a profile for *duplex scanning*. Checking the *Batch scan* box would cause a single document to be created from each individual page.



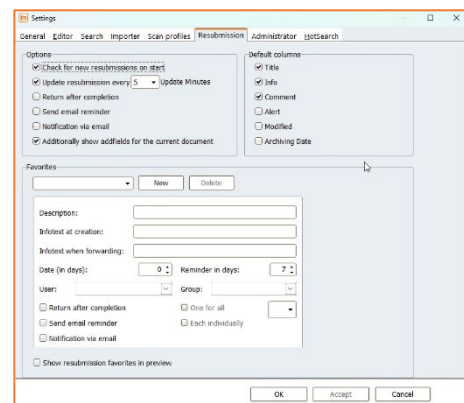
Note: A few document scanners deliver a white on black image instead of black on white when using the TWAIN interface. Only in this case should you check the *Inverse* box, which corrects this undesirable behavior accordingly. If in doubt, please contact your administrator regarding the optimum scan settings.

Caution: A lower resolution than recommended will result in incorrect text recognition for scanned documents. Make sure that the resolution is not lower than 300 dpi for b/w scans and 200 dpi for color scans. Make sure that the correct settings are also used for multifunction devices!

yy) Resubmission tab

You can change the settings for your *resubmission* under the *Resubmission tab*.

If the *Check for new resubmission at startup* option is activated, the application will first check whether



there are any new resubmissions for you each time it is started, which will then be available to you via the *Resubmission* tab.

Update resubmission every X minutes, checks your *resubmissions* in the selected time interval and updates them.

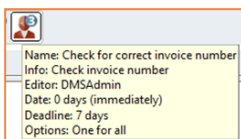
If you check *Back after completion*, a document that you have delegated to another person for processing is placed back in your own *resubmission* after completion. *Send reminder email informs* the person responsible and also the controller when a document is due that it is waiting for them in their *resubmission*.

Show additional fields of the document additionally causes the respective additional fields and their values to be displayed for each document within the *resubmission list*.

Under *Standard columns*, you can set which columns you want to be displayed in the resubmission hit list.

Note: The display of the standard columns has nothing to do with the additional fields.

Tip: You can save frequently used resubmission processes to certain editors or groups as *favorites*. By right-clicking on a document, you will see your favorites in the *Create resubmission* section as soon as you set the focus on this entry with the mouse, allowing you to delegate the same processes quickly and easily. You can also assign icons to these favorites, which are displayed in the annotation bar, so that you can quickly delegate tasks that are regularly assigned at the touch of a button.

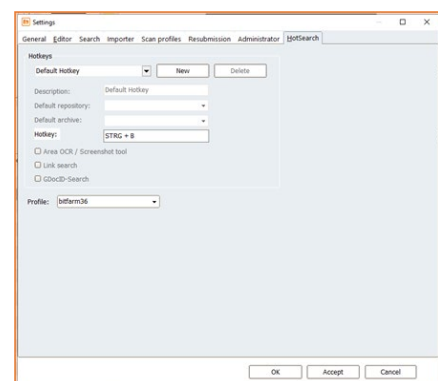


Note: You may have documents that you must always present to a specific user or user group in X days from the moment you view the document in question. Create a favorite for this as well, which then only presents this document on the set date, *date in days*.

A screenshot of a 'Favorite' configuration dialog box. It has several input fields: 'Description:' with 'Favorite 1', 'Infotext at creation:' with 'Submit document in 120 days', 'Infotext when forwarding:' (empty), 'Date (in days):' with '120', and 'Reminder in days:' with '7'. At the bottom, there are dropdown menus for 'User:' (set to 'User2') and 'Group:' (set to 'G1').

zz) HotSearch tab

Here you can assign *hotkeys*, which then carry out a search according to your settings, e.g. in a specific warehouse/archive, with a term previously marked and placed on the clipboard. You can also change the preset *standard hotkey* which searches the current archive for a term previously placed on the clipboard using *Ctrl + b*.

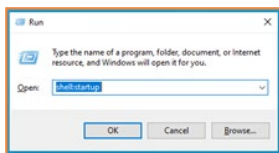


The *Screenshot function* allows you to search from other applications that do not allow you to copy the relevant information using Ctrl-C, i.e. where the previously available HotSearch mechanism cannot be used. To do this, you can draw up a graphical mask in which the search term must be located. HotSearch takes a screenshot and cuts out this area accordingly. The OCR function reads the graphic and starts the search in bitfarm-Archiv GPL. This works on current clients with virtually no delay. This feature is limited exclusively to searching for numbers!

You also have the option to search directly for a link. For *example*, when selecting an order number in the ERP, the entire order can be displayed directly in the DMS. Check the *GDocID search* box if, for example, you have saved the *GDocID* associated with this data record in your ERP in order to call up the archived document directly in the DMS.

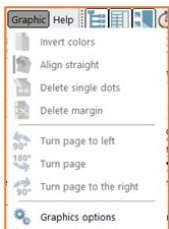
Note: If you want to carry out a link search via HotSearch, it is not necessary to select a specific archive, as a link search is always cross-archive and shows you all documents of this link within the scope of your authorizations.

Attention: You must restart *HotSearch* for your settings to take effect. Right-click on the *HotSearch icon* in your Windows taskbar and then select *Exit* to exit *HotSearch*. *HotSearch* is available as a shortcut in the startup of your operating system. Operating systems prior to *Windows 8* have an *Autostart* folder in the Start menu which you can use to restart *HotSearch*. This is no longer possible for operating systems after *Windows 8*. Press the key combination *Windows key + r* and enter the command *shell:startup* in the window that opens and confirm this with the Enter key. A Windows Explorer window will then open, showing you the programs that are started when you start your operating system. Double-click on the



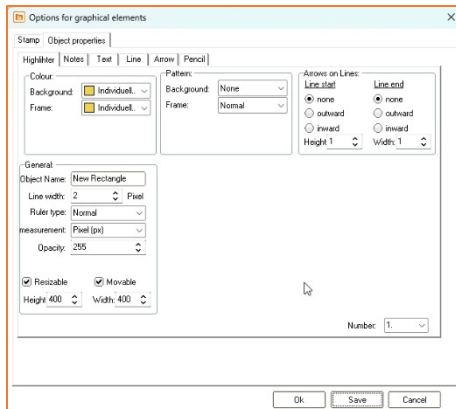
HotSearch shortcut to start HotSearch again.

27. Graphic options



You can access the graphic options as shown, or by clicking on the corresponding button in the annotations toolbar.

aaa) Change object properties



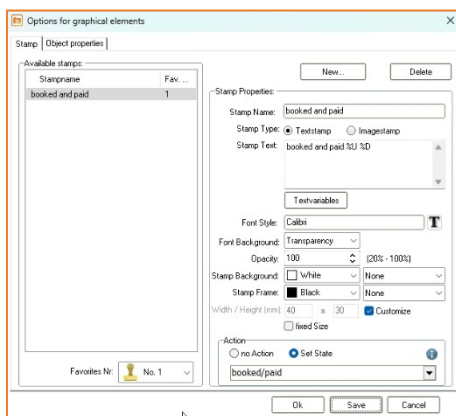
In the graphic options, you can change basic settings for *annotations*.

In the bottom row of tabs, select the object type that you want to edit. You can use the two arrows in the top right-hand corner to move through the row of tabs to see other annotation types. You can temporarily save the settings you have made by clicking *Apply*, save with *OK* and close the window.

For *notes*, *text*, *highlighter* and *freehand line*, you can make the default settings for 10 favorites each. Select the number of the favorite you want to edit from the drop-down menu in the bottom right-hand corner.

Objects in which text can be edited can now adjust their size to the written text while you are writing. You can set below the text field to determine whether an object should "grow" in height or width. You can use the *tab* key to navigate through the fields of the mask. If one of the tabs is activated, you can use the *cursor keys* to scroll quickly through the tabs.

bbb) Create and change stamps



To create new stamps, select the *Stamps* tab. Then click on *New*, assign a meaningful stamp name and change the stamp type to *Image stamp* if necessary.

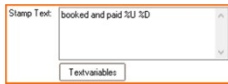
If you select *Text stamp*, you can enter your text for the stamp in the *Stamp text* box and use the button marked with a *T* to format the font, color and size. The text field can also be filled with *text variables*. For example, a *stamp* can automatically contain the current date, time and/or the user who sets it. By clicking with the left mouse button on the *Text variables* button, you get an

overview of which *text variables* you can use.

If you select *Image stamp*, the text field is grayed out. The button next to *Stamp image* opens a selection menu to search for the desired image. This is then displayed in the box below.

Make a stamp available as a *favorite* in the application by assigning your stamp to one of ten possible *favorites* under *Favorite no.*. You can also define the *width* and *height* of image stamps or automatically adjust them to the size of your stamp text.

To make changes to a stamp template, simply select the relevant stamp in the *Available stamps* box and then edit it, as when creating it.



Tip: You can also apply the contents of your clipboard to a document as a stamp. This works with images, e.g. screenshots, as well as with text that you have in your Windows clipboard. To do this, simply create an image stamp and check the box in Clipboard.

Note: With GPL version 3.6.2, it is now also possible for the application of a stamp to set a status. To do this, select the stamp that should also set a status and select *Set status* in the configuration under *Action* and then the available status that should be set. In the example above, released.

To be able to apply *annotations* such as *stamps* to a document, you must first *set it to edit*. The easiest way to do this is by pressing the F2 key or by clicking with the mouse on the corresponding buttons in the bitfarm-Archiv GPL application. Pressing the F2 key again saves your changes to the document and exits *edit mode*.

28. Keyboard shortcuts in text objects

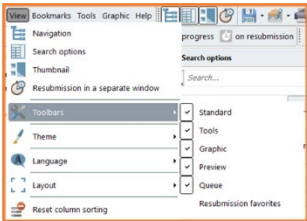
When working in text objects (notepad, text field, stamp), you can use various *shortcuts* to further simplify or speed up your work. Below you will find a list of the shortcuts and their functions.

Center text	Ctrl + e	Set text left-aligned	Ctrl + l
Set text right-aligned	Ctrl + r	Justification	Ctrl + j
Call up font options	Ctrl + f	Italicize selected text	Ctrl + i
Make highlighted text bold	Ctrl + b	Underline selected text	Ctrl + u

Change the background color of the selected text	Ctrl + g	Highlight entire text	Ctrl + a
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29. Customize user interface

You can customize the user interface of the bitfarm-Archiv GPL application, for example by clicking on View and selecting the settings that suit your needs.



For example, you can show or hide individual toolbars or windows, change the interface design with regard to the color scheme or choose between English and German language settings.

HotSearch

Documents that were created in other Windows applications or from which data was also transferred to other applications are often searched for in the archive. *HotSearch* ensures that you can access the document you are looking for as quickly as possible.

30. Search with HotSearch

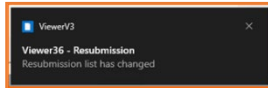
HotSearch is usually started automatically when the computer boots up. You can tell that the program is active by the *HotSearch icon* in the notification area on the right-hand side of the taskbar.

Using the key combination *Ctrl + c* and then *Ctrl + b* (standard hotkey), previously selected text from any Windows application can now be transferred to the application as search text, which then immediately performs a full-text search in the last selected archive or storage location. It is only important that the Windows application allows information to be transferred to the *clipboard*. For example, in your ERP application, you can select the content of the *invoice number* field by double-clicking on it and then press *Ctrl + c* and *Ctrl + b* to have the invoice immediately on the screen.

Just as you can search the entire archive for a term previously placed on the clipboard using *Ctrl + b*, you can do this in specific storage locations and archives using your *hotkeys*. You can define individual hotkeys under the *HotSearch* tab in the options and settings.

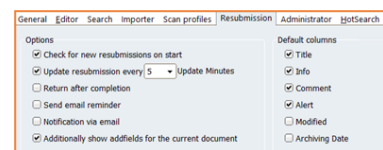
Note: Changes you have made to the *hotkeys* only take effect when *HotSearch* is restarted. An explanation of how to restart HotSearch can be found in a previous [chapter](#).

31. Reference to new resubmission



If HotSearch is active, your resubmission list is checked at regular intervals. If there are any changes here, the icon in the info area starts to flash and a speech bubble opens to inform you of the change. The HotSearch icon flashes until you open your resubmission list. Double-click on the HotSearch icon to open the application, if it is not already open, and display the document that is now in your resubmission

Note: You can specify the intervals at which your resubmissions are to be checked in the options and settings of the bitfarm-Archiv GPL application. By default, the check takes place every 5 minutes.



32. Create a screenshot and send it to the importer

If HotSearch is activated, the key combination Ctrl-Alt-M is used to create a screenshot which is then sent to the importer as a PNG, which can then be archived accordingly.

The importer

The *importer* is made available to you as a panel below the archive tree. You can open it by left-clicking. You can use the *importer* to import documents from the file system or a connected scanner.

You can load documents from the file system either via the corresponding button in the importer or via drag & drop from Windows Explorer.

Another option for importing files from Windows Explorer is to send them to the *importer* by right-clicking on "Send to bitfarm".

E-mails from Outlook as well as documents in Word and Excel can be sent directly from the respective application to the importer using the bitfarm-Archiv add-in.

ccc) Editing documents in the Importer

Documents in TIF format can be combined into a single document or individual pages of a multi-page TIF can be removed and repositioned.

To link, drag the desired page onto the corresponding document to which it is to be linked. A green frame indicates that the documents will be linked to form a new "complete document" when you release the mouse button.

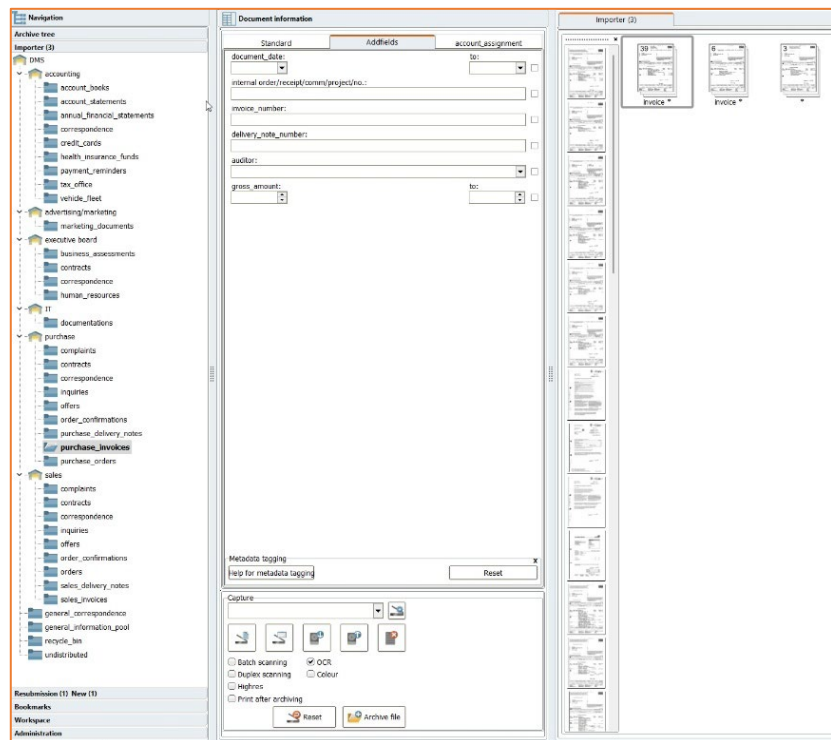
Tip: You can also *split* or *merge* selected TIFs by right-clicking. Double-clicking on a document opens it either in a docked panel, in the editor itself, or in a separate tab within the importer, depending on the setting, which you can adjust in the *options and settings* according to your wishes.

The naming of documents in the Importer can be controlled via an option (File menu - Options - Importer - "Always use title when archiving"). The default behavior is that documents from files are given the file name as the title. For emails, the subject is used. Titles are displayed below the document. They can be changed by pressing the F2 key or double-clicking on the title.

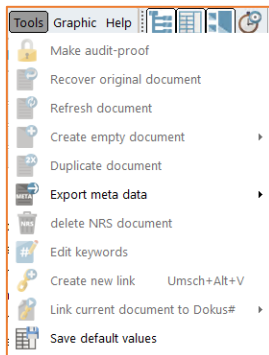
If the "Always use title when archiving" option is not set, the titles will still appear in gray below the document. However, they will only be used once you enter and exit edit mode (e.g. using the F2 and Return keys).

If you would like to archive a document that you have selected in the *importer*, first select the desired document by clicking on it (highlighting it), then select the target archive, add any *additional fields* if necessary, add *keywords* or *links* manually and/or assign the document to an employee or group for editing (via the *Standard* tab) and then click on "Archive".

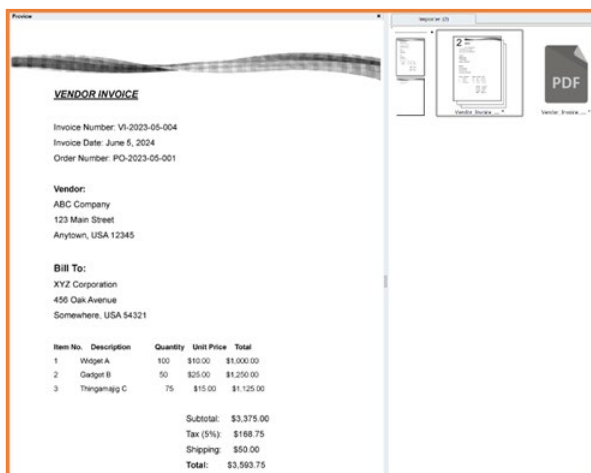
Tip: If you frequently archive documents with the same or similar additional field content



in an archive, enter this content once and select "Tools" - "Save standard values - additional fields" in the menu. The entered values are then always displayed when you click on the relevant archive in the importer. You can then accept the values, change them or reset them by clicking on Reset.



You can also use the [keywording help](#) to simplify the completion of additional fields. The administrator can also define rules on the server for the automatic keywording of similar documents.

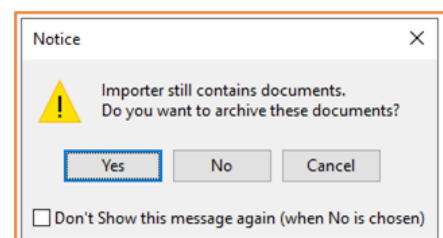


Tip: For a better overview, the view can be enlarged by holding down the control key and turning the mouse wheel. If you need a real preview of the document, double-click on the relevant document while holding down the Ctrl key. The document is then displayed in a preview window, which appears in the left half of the screen as shown. If this document consists of several pages, you can *drag and drop* individual pages from the document into the Importer

as a separate document using the thumbnail view, for example.

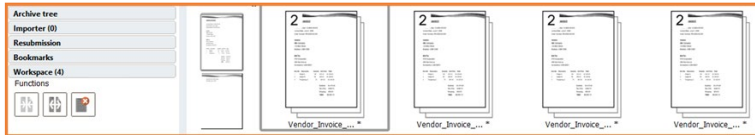
Note: A simple *drag-and-drop* of pages causes them to be removed from the "entire document"; if the Ctrl key is held down, the page or pages remain in the entire document.

If you close the bitfarm-Archiv GPL application while there



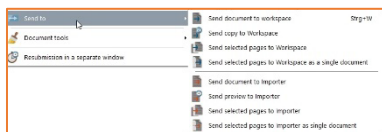
are still unarchived documents in the Importer, you will receive a message to this effect. If you confirm this message with No, you will still have these documents in the Importer the next time you start the application.

Workplace



The workspace allows you to temporarily collect documents that have already been archived, for example to annotate them, send them by e-mail, print them or save them. You can also select individual documents in the workspace and merge them into a new overall document, archive it as a new document, save it, print it or send it by email.

Select the relevant document in the application and *drag and drop* it onto the My Computer tab or right-click on the document and select the *Send* dialog. You can also select individual pages of a multi-page document and drag them to the My Computer tab.



Send document to workstation means that changes to this document, e.g. in the form of notes, are also visible on the archived document. *Send copy to workstation* means that a copy of the archived document is placed on the workstation. Ultimately, this represents a new document. Annotations on this copy have no effect on the original document.

Note: When you close the application, documents that you have on the workstation are retained and are available to you when you log in again.

Tip: The key combination *Ctrl + W* can also be used to send documents from the application to the workstation.

Appendix

33. Keyboard shortcuts (bitfarm-Archiv GPL 3.6.2)

General

Marking all pages	Ctrl + A
Marking an area	Shift + click
Marking individual pages	Ctrl + click
Page change in the preview	Arrow up/down
Navigating through the hit list	Arrow scroll buttons, Pos1, End
Search via the search slot on the selected archive	Ctrl + F
Search via the search slot across all archives	Ctrl + Alt + F
Full screen mode	F11
Full screen mode with notes	Alt + F11
Call up last document	Ctrl + O
Remember document	Shift + Ctrl + 1...5
Call up marked document	Ctrl + 1...5
Previous document from the history	Alt + Ctrl + "Left"
Next document from the history	Alt + Ctrl + "Right"
Open document in own tab	Ctrl + T
Open document in own window	Ctrl + N
Navigation through the locations that are marked in the preview	F3
Focus on hit list	F4
Repeat search	F5
Reset	F6
Copying a document to the clipboard	Ctrl + Ins

Copy original file to the clipboard	Shift + Alt + Ins
Copy page to clipboard	Ctrl + Alt + Ins
Copy DocLink to the clipboard	Shift + Ctrl + Ins
Send document to workstation	Ctrl + W
Reach menu	F10
Sort view in the Importer	F9 also Ctrl + double-click
Cancel	ESC

Save

Save document locally as TIF	Ctrl + L
Save document locally as PDF	Ctrl + Alt + L
Save original file	Shift + Alt + L
Save locally with preview	Shift + Ctrl + L

Print

Print with preview	Ctrl + P
Printing with standard printer	Shift + Ctrl + P

Dispatch by mail

Send as PDF	Ctrl + M
Send as TIF	Shift + Alt + M
Send with preview	Shift + Ctrl + M

Keywording

Rename document	Ctrl + R
Set document in process	F2

Navigating through additional fields	TAB or Shift + TAB
Area OCR	Ctrl + Y
Create link	Alt + Shift + V
Current date in additional field	Ctrl + Shift + <
User in additional field	Ctrl + <
Save	Ctrl + S

Annotations

Center text	Ctrl + E
Text left-aligned	Ctrl + L
Text right-aligned	Ctrl + R
Justification	Ctrl + J
Font options	Ctrl + F
Marked text in italics	Ctrl + I
Marked text bold	Ctrl + B
Underline selected text	Ctrl + U
Change background color (Text-Annos)	Ctrl + G
Highlight entire text	Ctrl + A
Input mode	Select Anno + Enter
Exiting the input mode	ESC
Selection tool (object selection)	F8
Leaving the selection	F7
Marking all annos	Ctrl + A
Marking individual annos	Ctrl + "Click"

Navigating through Annos	TAB or Shift + TAB
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Resubmission









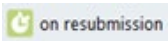


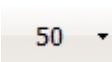
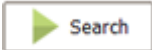
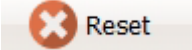


Switch to the Resubmission tab	Alt + 3
Create a new Resubmission	Alt + Shift + W



Switching through program elements (tabs)

Switch to administrator (only visible to administrators)	Alt + 0
Switch to stock and archives	Alt + 1
Switch to importer	Alt + 2
Switch to Resubmission	Alt + 3
Switch to bookmarks	Alt + 4
Switch to workstation	Alt + 5
Switch to standard tab	Alt + 6
Switch to additional fields tab	Alt + 7
Switch to Shortcuts tab	Alt + 8
Switch to preview	Alt + 9

34. The bitfarm-Archiv GPL application - Operating elements

	Shows or hides the archive tree		Shows or hides the search options
	Shows or hides the thumbnail view		Docks or undocks the resubmission list
	Saves the document locally (options as drop-down menu)		Sends the document by e-mail (options as drop-down menu)
	Prints the document (options as drop-down menu)		Copies the document to the clipboard (options as drop-down menu)
	Rotates the current document page(s) as displayed		Allows you to edit the keywords
	Creates a new link (autoreference) for selected documents		Creates a new link for selected documents (dialog box for assigning names)
	Links selected documents with last active link		Removes a page (not for documents that have already been archived, but in the Importer, for example)
	Shows how many documents are currently in the server queue		Files an NRS document in an audit-proof manner with the appropriate authorization
	Shows which of how many pages is currently displayed, allows you to scroll forwards and backwards		Indicates the current display size of the preview and allows it to be changed (drop-down menu or

	and enter the page number directly		mouse wheel)
	Displays the current autozoom mode and offers selection options (drop-down menu)		Shows or hides public annotations
	Shows private annotations. Release option for users (drop-down menu)		Shows or hides stationery
	Displays existing links and allows you to call up linked documents.		Displays existing original files and allows them to be called up
	Enables a document to be checked out/checked in. Shows whether a document is checked out and by whom.		Indicates whether the document is being processed and by whom.
	Indicates whether the document is on resubmission and with whom.		Goes backwards through the search history
	Goes forward in the search history		Sets maximum hit display
	Starts the search (F5)		Stops the search, resets the search settings (F6)
	Puts the document into editing mode so that keywording can be carried out (F2)		Saves the changes and exits the editing mode (F2)

	Discards, for example, tags that have not yet been saved (ESC)		Shows or hides the location marker
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35. Annotations toolbar

	Saves the annotation and exits edit mode.		Activates handles for zooming in/out, enables moving
	Provides selected stamps (favorites)		Opens a selection window for available stamps
	Provides different colored pens (drop-down menu)		Provides different colored highlighters (drop-down menu)
	Provides notepads in different colors (drop-down menu)		Draw arrow
	Activates the line tool		Activates the text tool, offers a selection of text favorites
	Enables editing of the graphics options		Performs OCR in the area to be selected (subsequent transfer to additional fields by right-clicking in the selection)
	Delete annotations		Search in the current tab (preview, full text, history and comments)

36. Optimize search times

Below you will find a brief overview of how you can optimize your search queries if the return of your query result takes too long.

- ➔ Ideally, formulate your *full-text search at archive level*
- ➔ Set the *maximum number of hits* to 50 and the 50 most recent documents will be displayed.
- ➔ Restrict the *search period* to the last year. You can activate this in the *options and settings*.
- ➔ In the Options and settings in the Search tab, activate the option Use start of word for full text search.
- ➔ Combine the different *search methods*, e.g. *date range + full text* or *additional fields + full text*.
- ➔ If you regularly work with documents that are always the result of the same search query, execute the search and save it. (See chapter *Bookmarks*)

bitfarm Informationssysteme GmbH

Spandauer Str. 18

57072 Siegen

info@bitfarm-archiv.de

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