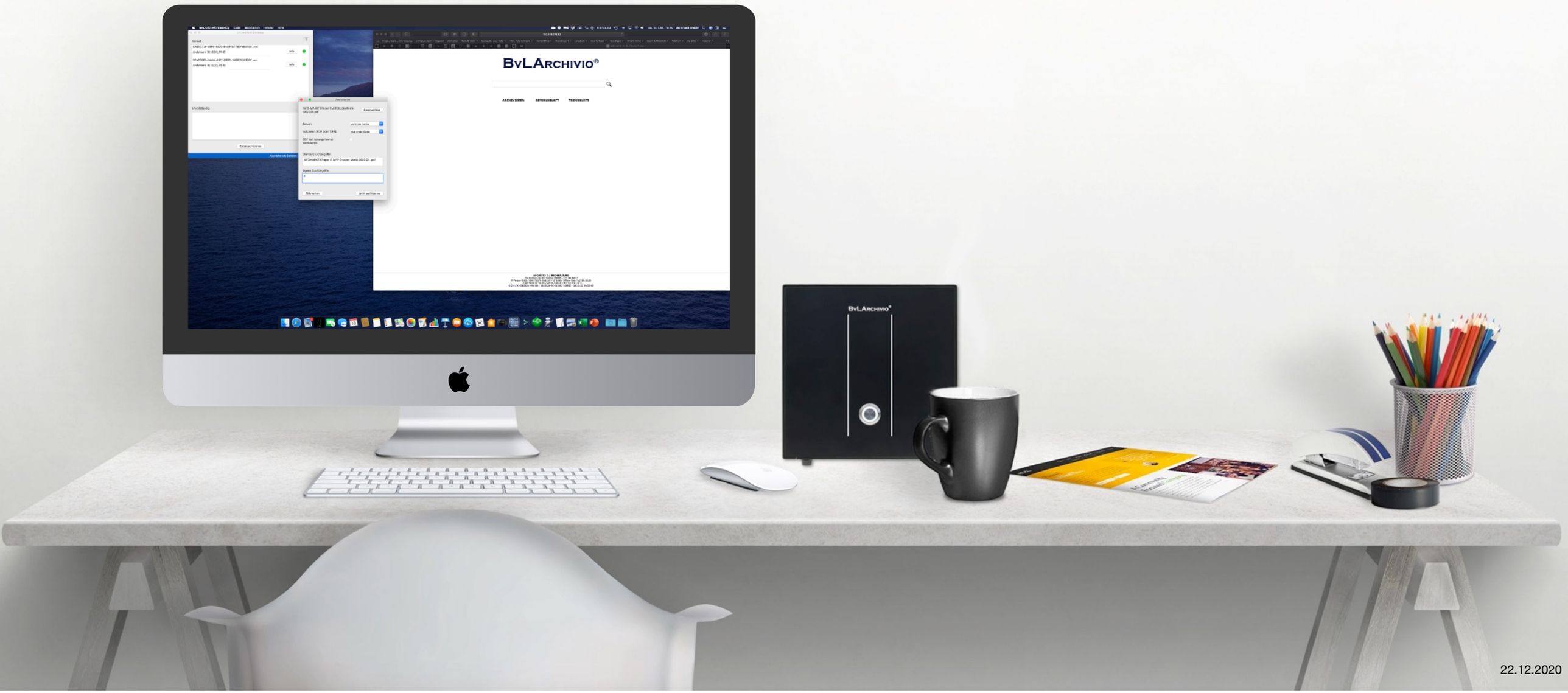


22.12.2020

BvLArchivio Desktop for macOS

Manual

Chapter 1

Prologue

1.1 The company

BvL.com GmbH

Today and in the future, we focus on helping companies to digitise. We not only deliver our products, but we also advise companies and help them into the digital age with our years of experience.

Today, BvL.com GmbH is an established company that combines a high level of expertise with the necessary service mindset. In the last 33 years, more than 100,000 customers in Europe have chosen BvL.

BvL.com GmbH
Müllerstraße 138 D
13353 Berlin
Deutschland
www.BvLArchivio.com

1.2 Die BvLArchivio Desktop App

Information

The BvLArchivio Desktop App described in this manual is free of charge and can only be obtained from the App Store.

The BvLArchivio Desktop App serves as an interface between the Mac system and the BvLArchivio Server.

To realize the upload, the file transfer protocol (FTP for short) required for this is included in the BvLArchivio Desktop App.

No additional software products need to be purchased and installed.

Files, documents and emails can be archived quickly and easily directly in the BvLArchivio server in an audit-proof manner.

Additional functions can be realized via the macOS Automator[1] and AppleScript[2].

BvL.com provides three routine tasks free of charge.

- Archive from within the Finder (Chapter 5.2 ➡)
- Archiving a printout (Chapter 5.3 ➡)
- Archive via E-Mail (Chapter 5.4 ➡)

[1] Automator is an Apple program that comes with the Mac operating system. Automator is used to automate routine tasks. In a way, Automator works like a robot. This is why the program icon is a robot.

[2] AppleScript is a scripting language from Apple which is also part of th MacOS. AppleScript automates, extends and remotely controls MacOS programs.

For more information, please contact the BvL Hotline ➡.

Chapter 2

Installation

2.1 The BvLArchivio Desktop App Installation

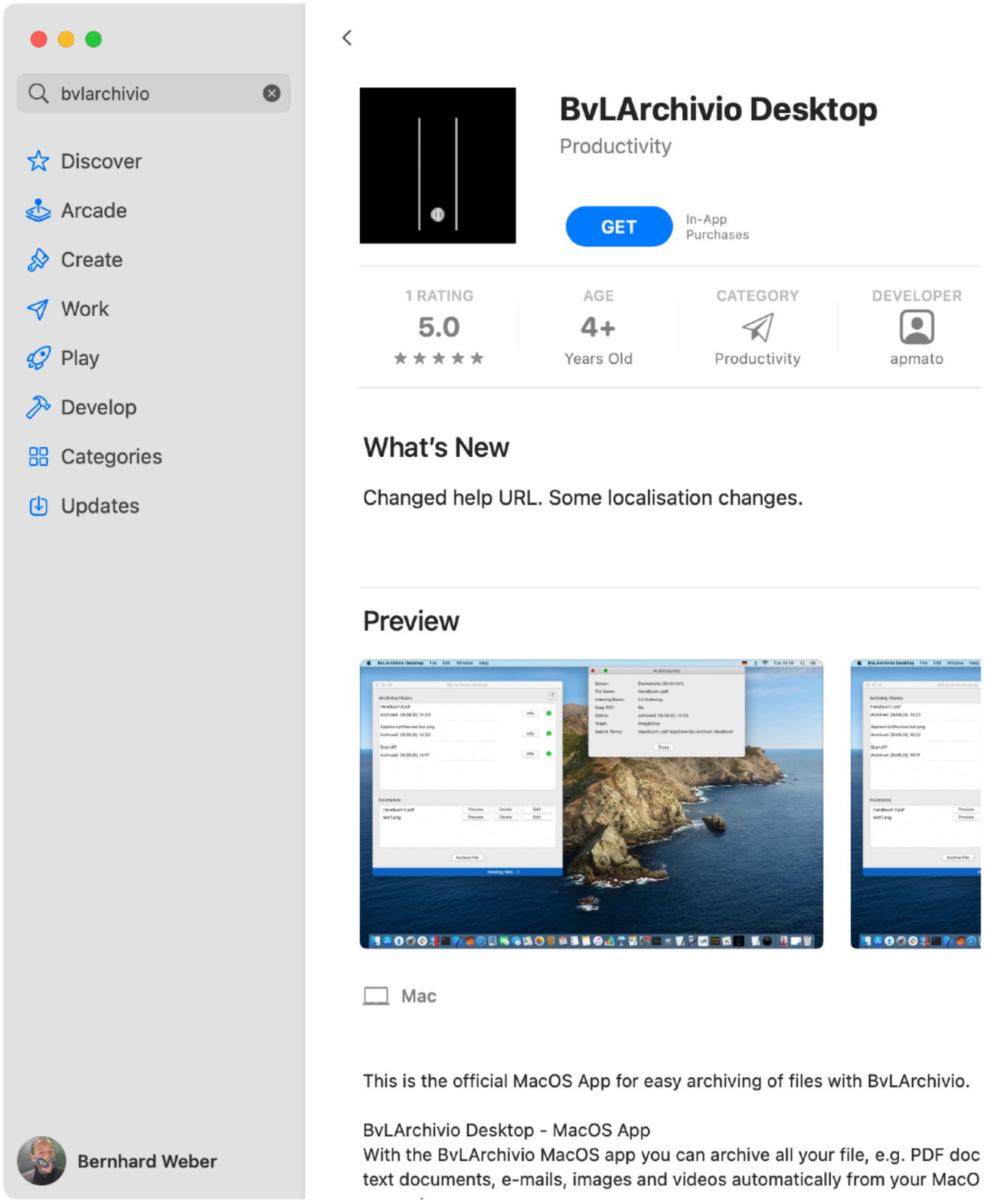
The App Store

The App Store is a safe and trusted place to find and download apps. All apps from the App Store have a high standard of privacy, security and content. With the appropriate settings, the user is automatically provided with updates after installation.

Installing the app

Search for "BvLArchivio" via the magnifying glass 🔍 in the App Store and install the app.

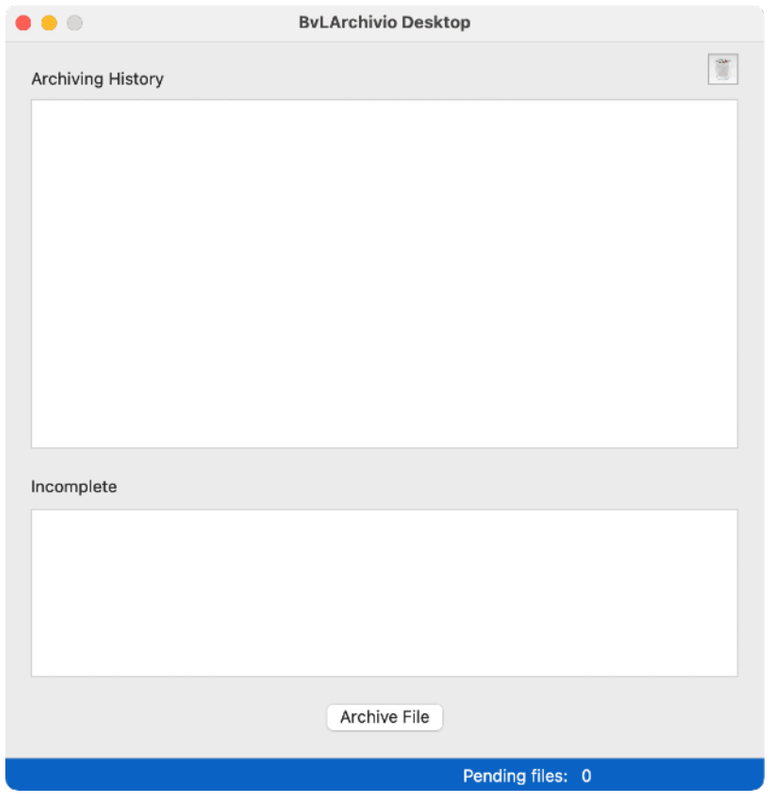
1. GET In-App Purchases
2. INSTALL In-App Purchases

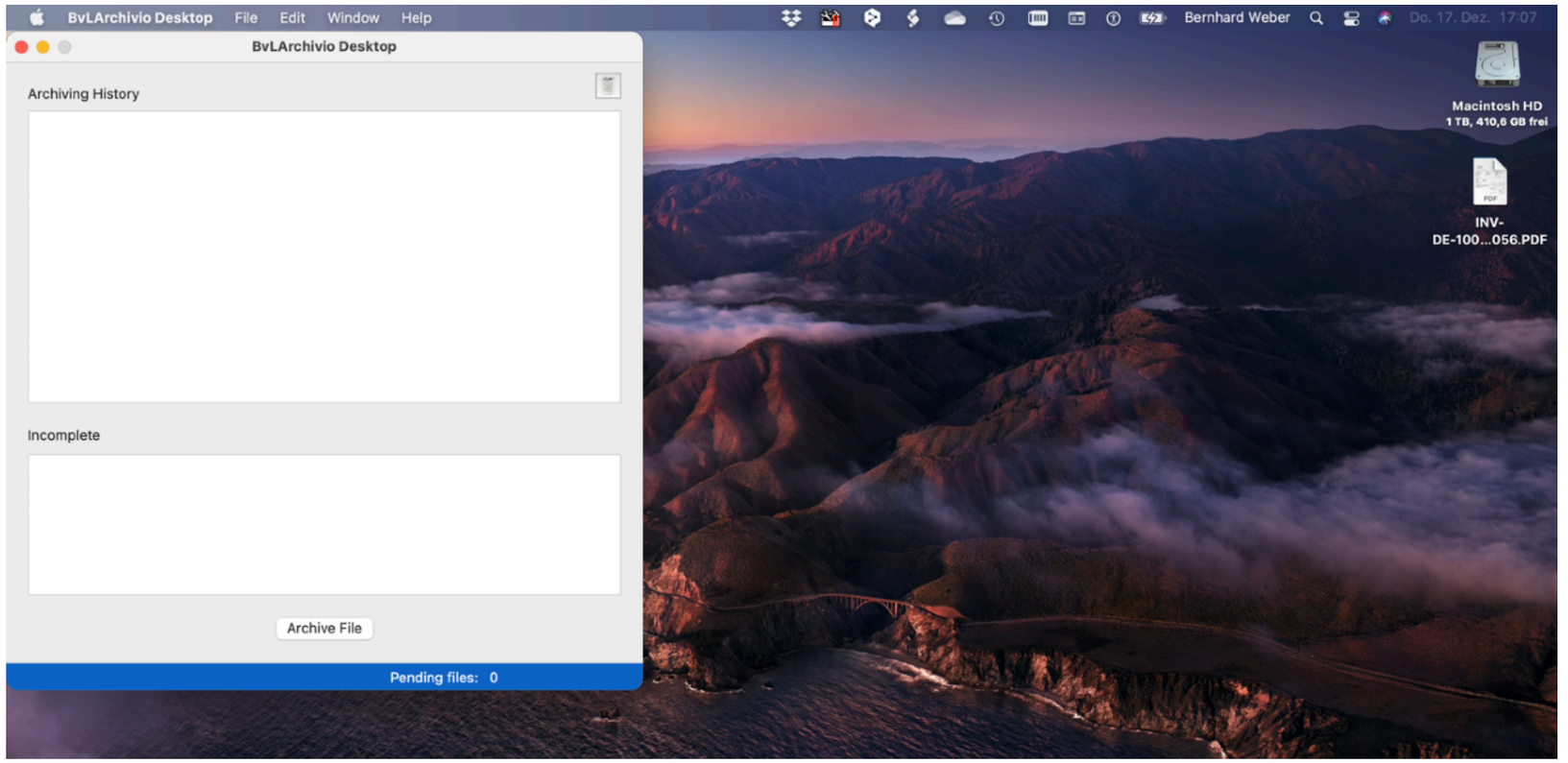


Chapter 3

Configuration

3.1 Setup after launching BvLArchivio Desktop for the first time





Start

At first, go to Programs and start BvLArchivio Desktop.

Configure FTP input

The next two pages describe the possible configurations.

The setup allows for different customer settings.

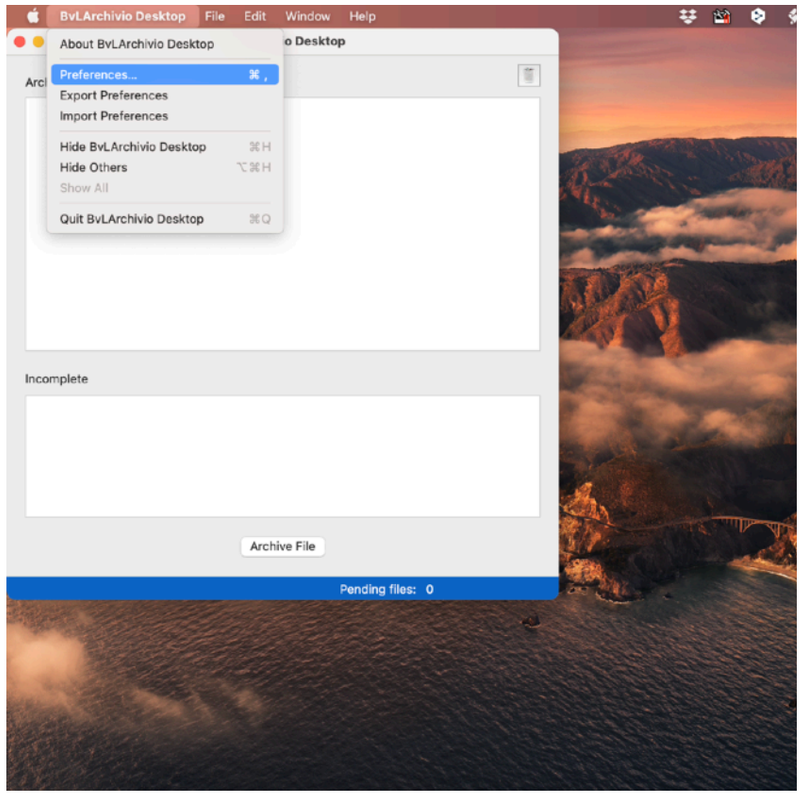
Two examples can be found in this chapters on the pages 3.5 and 3.6 ➡.

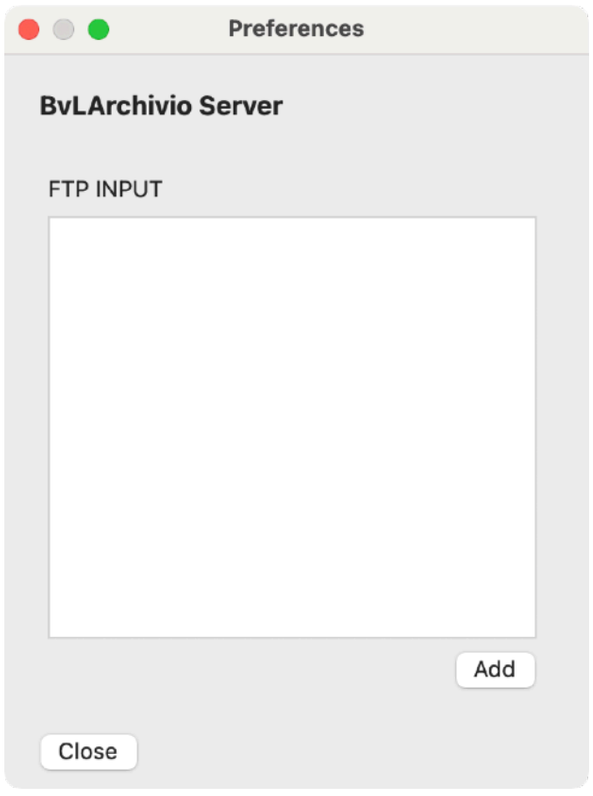
It is possible to archive documents by the Document Class ➡ and by the name of a Department ➡.

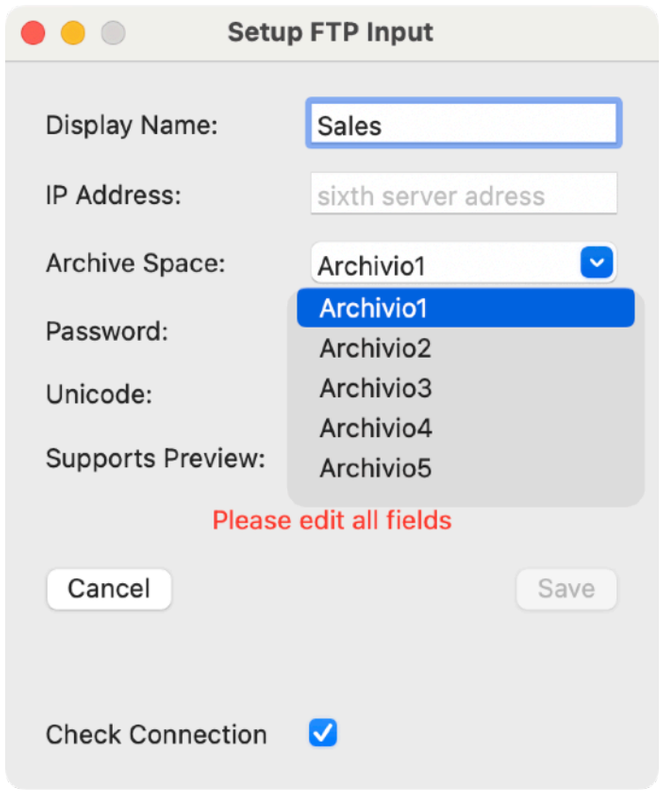
Even a mixed application is possible.

The setup of the BvLArchivio Desktop App is comparable to that of a multifunctional system.

3.2 Preferences: FTP Input and Display Name







Picture left:

After the start

After the start of teh app, you will see the menu bar of the BvLArchivio Desktop App.

The menu bar is described in Chapter 4.3 ➡.

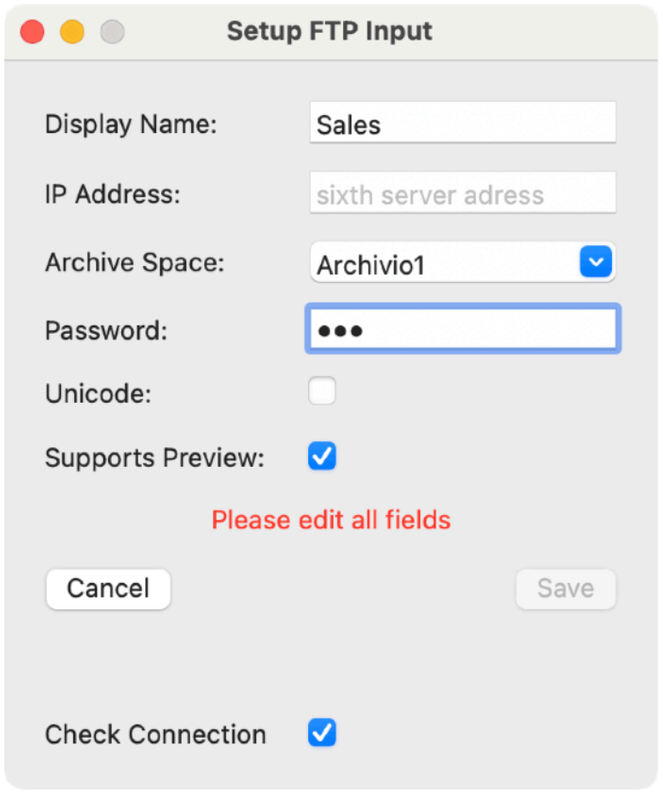
Click on [BvLArchivio Desktop] in the menu bar and then on [Preferences...].

Picture centre and right:

Click [Add] to setup a new FTP input.

- The display name is the name that can be selected during archiving.
- IP address: Enter the 6th IP address here.
- Archive space: Determine here in which archive space the file is to be stored.

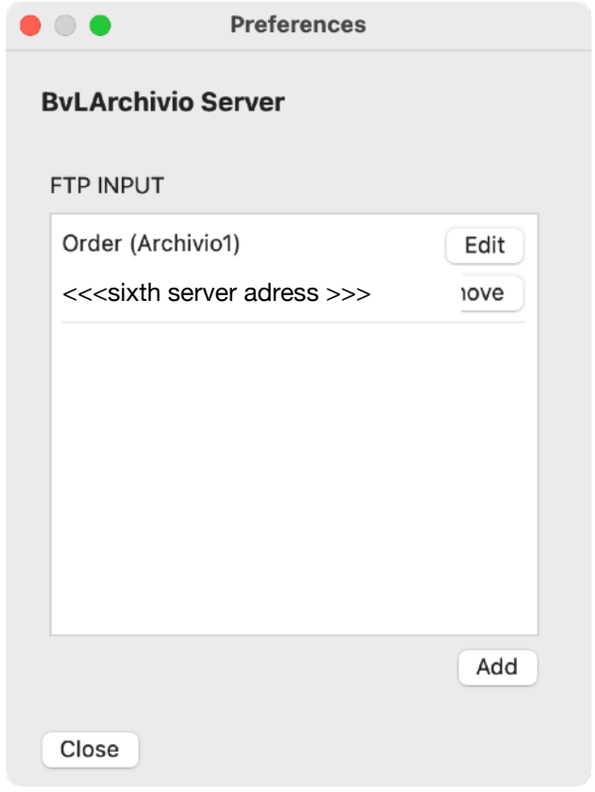
3.2 Preferences: FTP Input and Display Name



Picture left:

- Password: Enter the password of „Archivioi“
- Supports preview: Creates preview images.
- Check connection: Checks the availability of the server in addition to the password.

The [Save] button checks your entries and saves them.

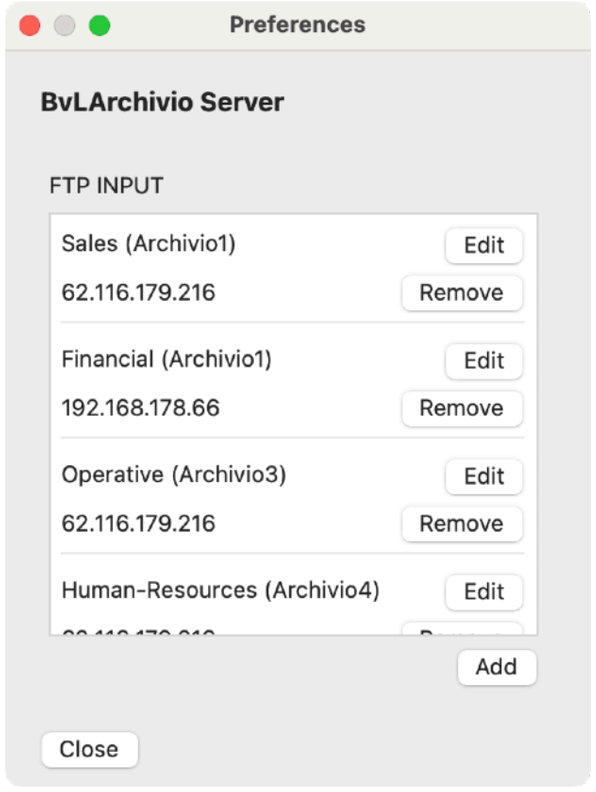


Picture centre:

Display name

The display name, IP address and archive room of the BvLArchivio system (here Archivio1) is visible in the window BvLArchivio Server.

Here it is called FTP input.



Picture right:

Multiple display names

When the configuration is done, the view of the window changes as shown above.

If you need to configure several systems, you can easily Export ➡ a preferences file (.prefs) and then Import ➡ it on another system. (see Chapter 7).

In the section online-help you can download the settings of a test system.

3.5 Example - Department

Archiving via the department

BvLArchivio Desktop is flexible and allows to configure the program to serve different customer requirements.

The example shows the setup and subsequent archiving via departments.

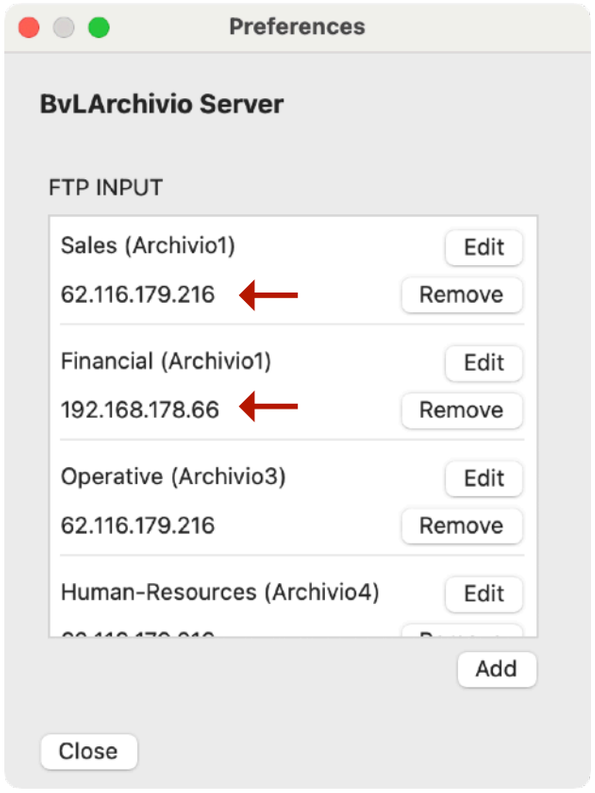
It is possible to create different departments.

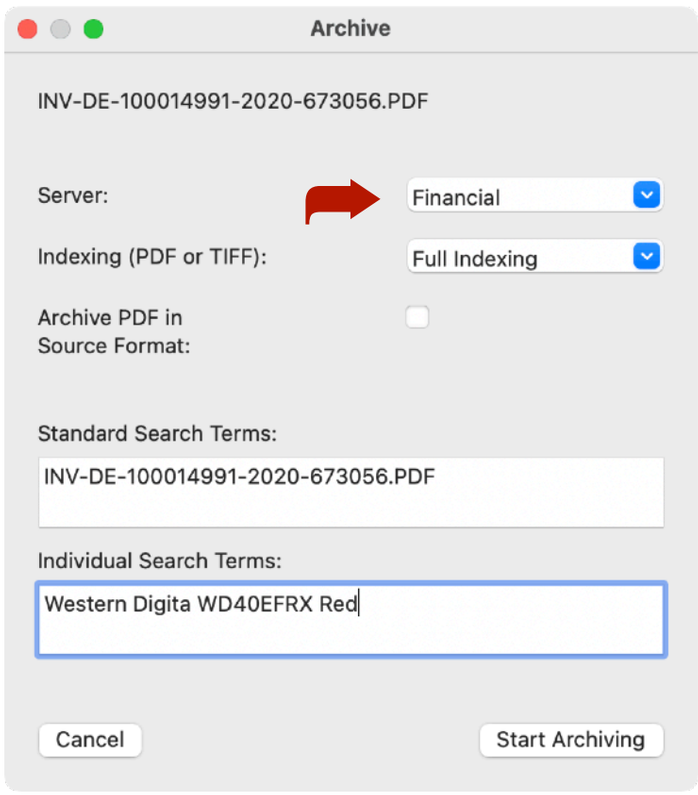
During configuration, the company's departments are used in the field Display Name.

The archiving locations can be made available via the display names of one or more BvLArchivio servers.

The example shows ← that sales and accounting are implemented on different servers.

During archiving, the Archive window allows the selection ➦ of the different departments.





3.6 Example - Document

Archiving via the name of the document

BvLArchivio Desktop is flexible and allows for different customer requirements.

The example shows how to set up and later archive documents using document classes.

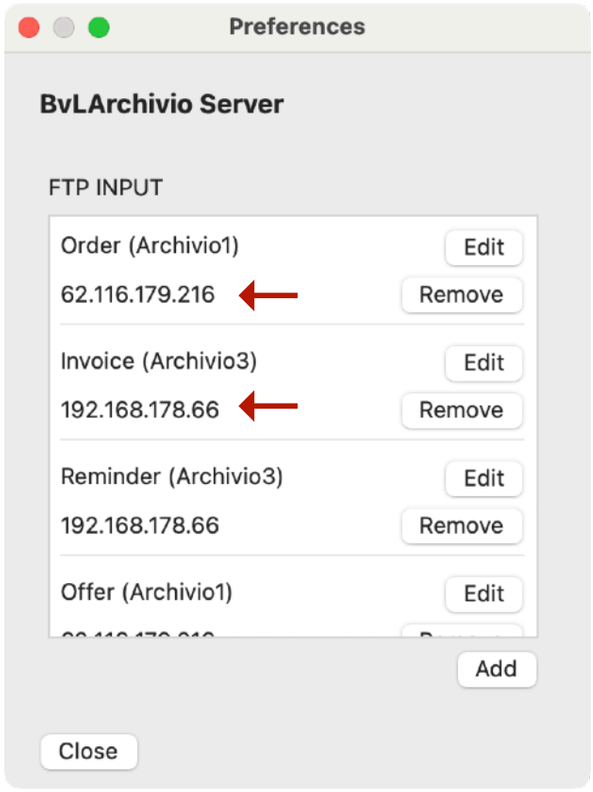
It is possible to create a large number of document classes.

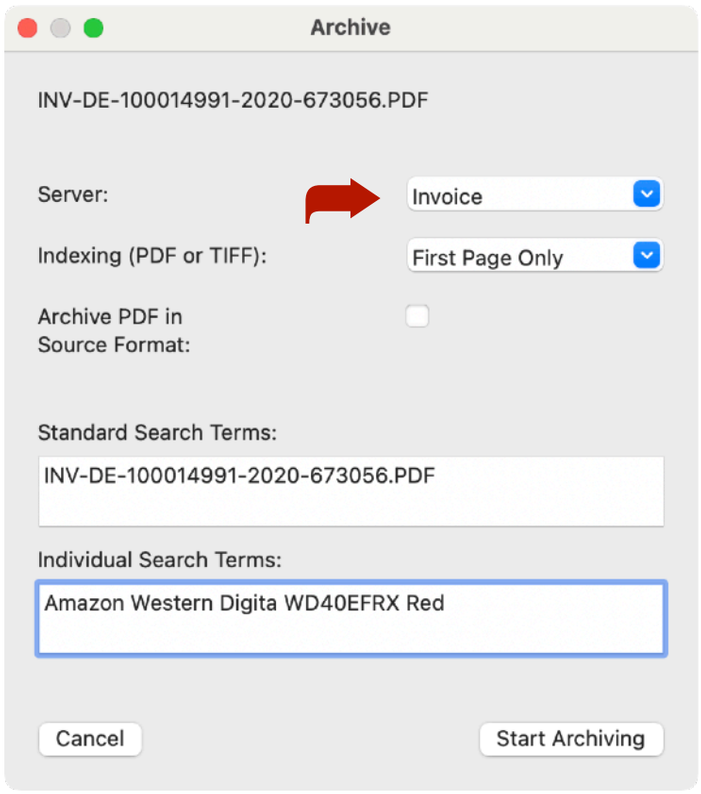
During configuration, the document class defined by the company was stored in the Display name field.

The archiving locations can be made available via the display names of one or more BvLArchivio servers.

The example shows ← that the documents for invoices and orders are archived on different servers.

During archiving, the Archive window allows the selection ➦ of the different document class.





Chapter 4

BvLArchivio Desktop App

BvLArchivio Desktop File Edit Window Help

BvLArchivio Desktop

Archiving History

Incomplete

INV-DE-100014991-2020-673056.... Preview Delete Ec

Archive File

Pending files: 1

Archive

INV-DE-100014991-2020-673056.PDF

Server: Invoice

Indexing (PDF or TIFF): First Page Only

Archive PDF in Source Format:

Standard Search Terms:

INV-DE-100014991-2020-673056.PDF

Individual Search Terms:

Amazon Western Digita WD40EFRX Red

Cancel Start Archiving

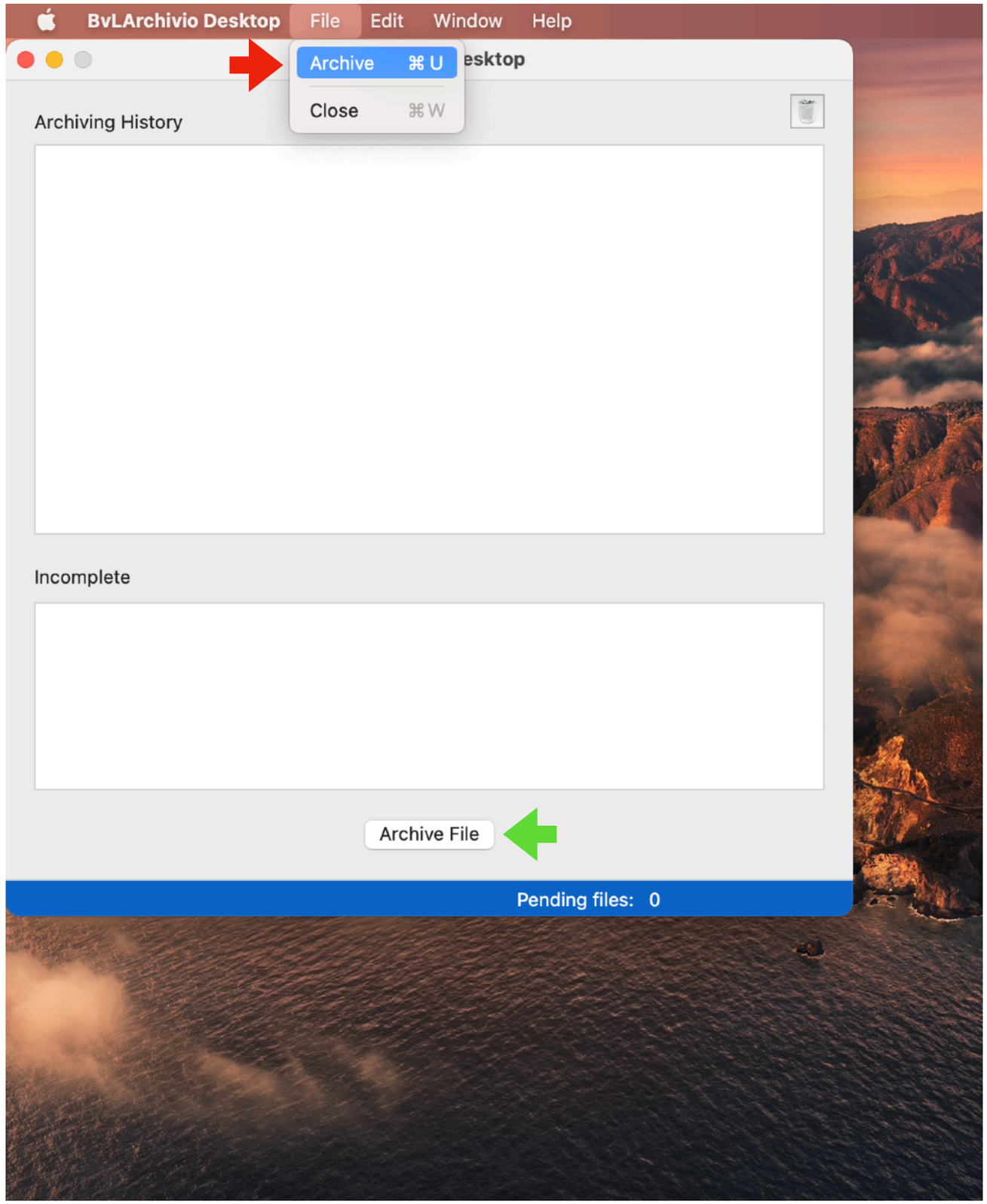
4.1 Archiving files with the BvLArchivio Desktop App

Archiving files with the BvLArchivio Desktop App

4.1.1 Via the menu bar

The Archive function is made available via the menu bar.

Start BvLArchivio Desktop and click on [File] and [Archive].

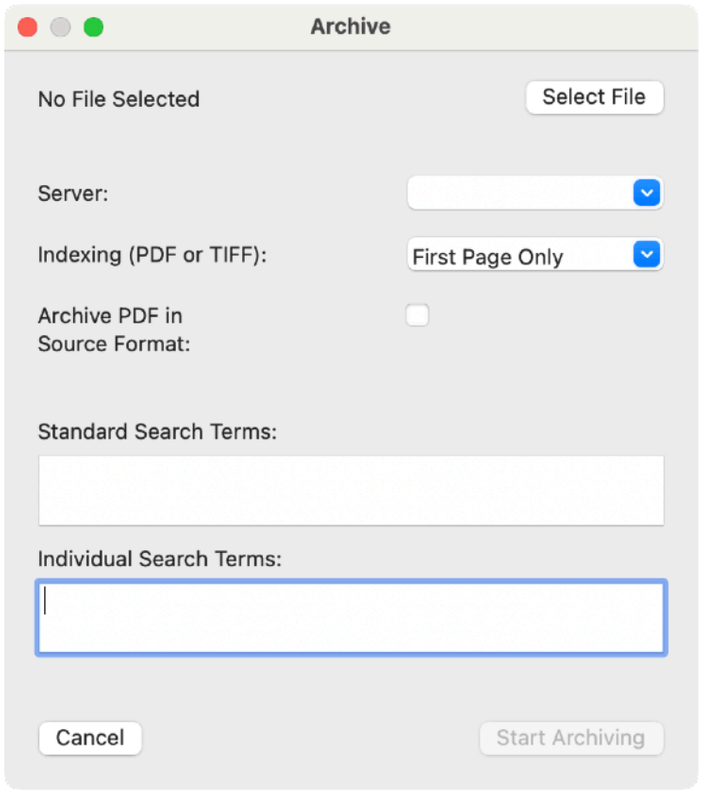


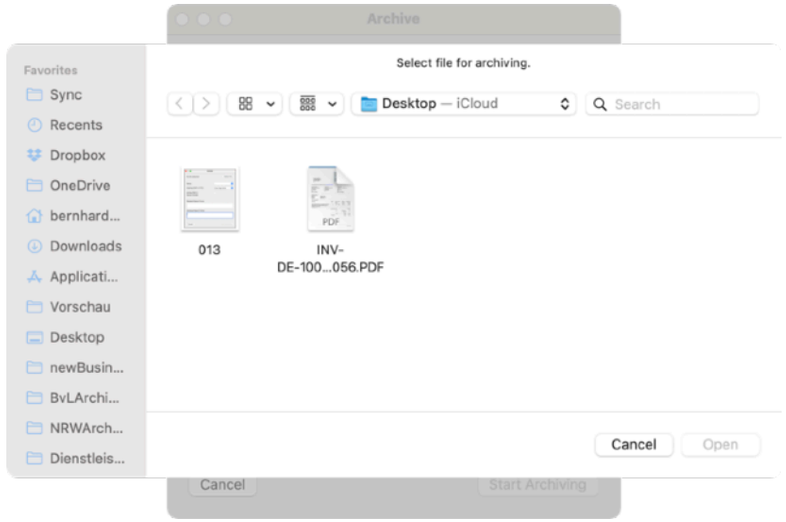
The flexible BvLArchivio Desktop App provides several functions for audit-proof archiving.

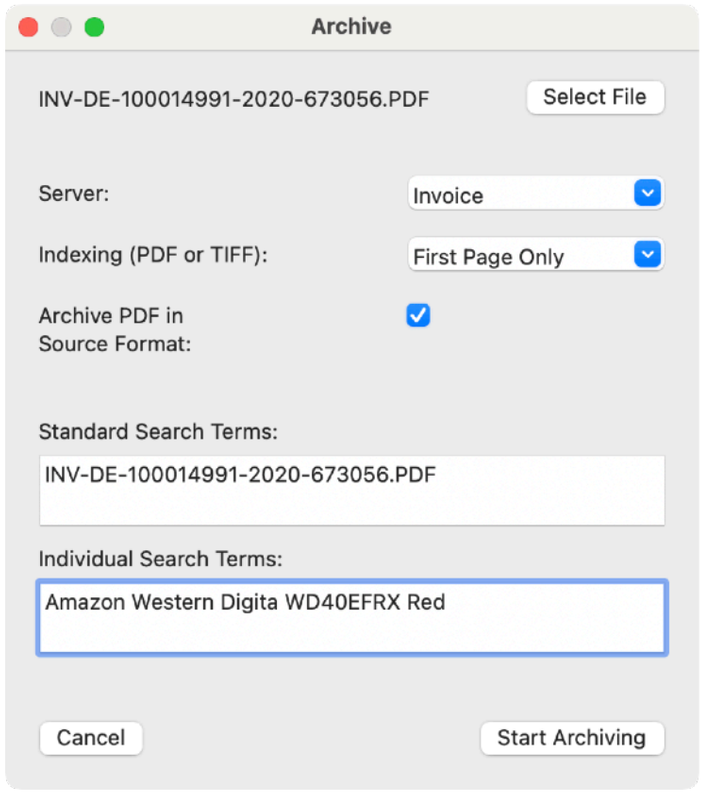
There is the possibility to archive via

1. the function ➡ [File], [Archive] and ➡ [Archive File].
2. or via drag & drop.
3. Additional possibilities are described in Chapter 5 ➡.

Archiving files with the BvLArchivio Desktop App







Picture left:

After selecting [Archive], the archiving window appears

[Select File] opens the Finder and allows you to select a file.

Picture centre:

Click on a file to select.

Click on [Open] to use this file for archiving.

Picture right:

Then select the department (server) and the type of indexing.

Archive PDF in source format determines whether to archive the PDF as is or in the format PDF-A.

Standard Search Terms: The original file name is the default. You can change or delete the suggested file name freely.

Individual Search Terms: Allows you to enter additional search terms.

Click on [Start Archiving] to transfer the file to the BvLArchivio system.

An overview of the processing is described in Chapter 4.2.1 ➡.

Archiving files with the BvLArchivio Desktop App

4.1.2 Via Drag & Drop

In addition to moving files, the Drag & Drop function also offers the possibility to transfer files to another application for processing.

Work Steps Drag & Drop

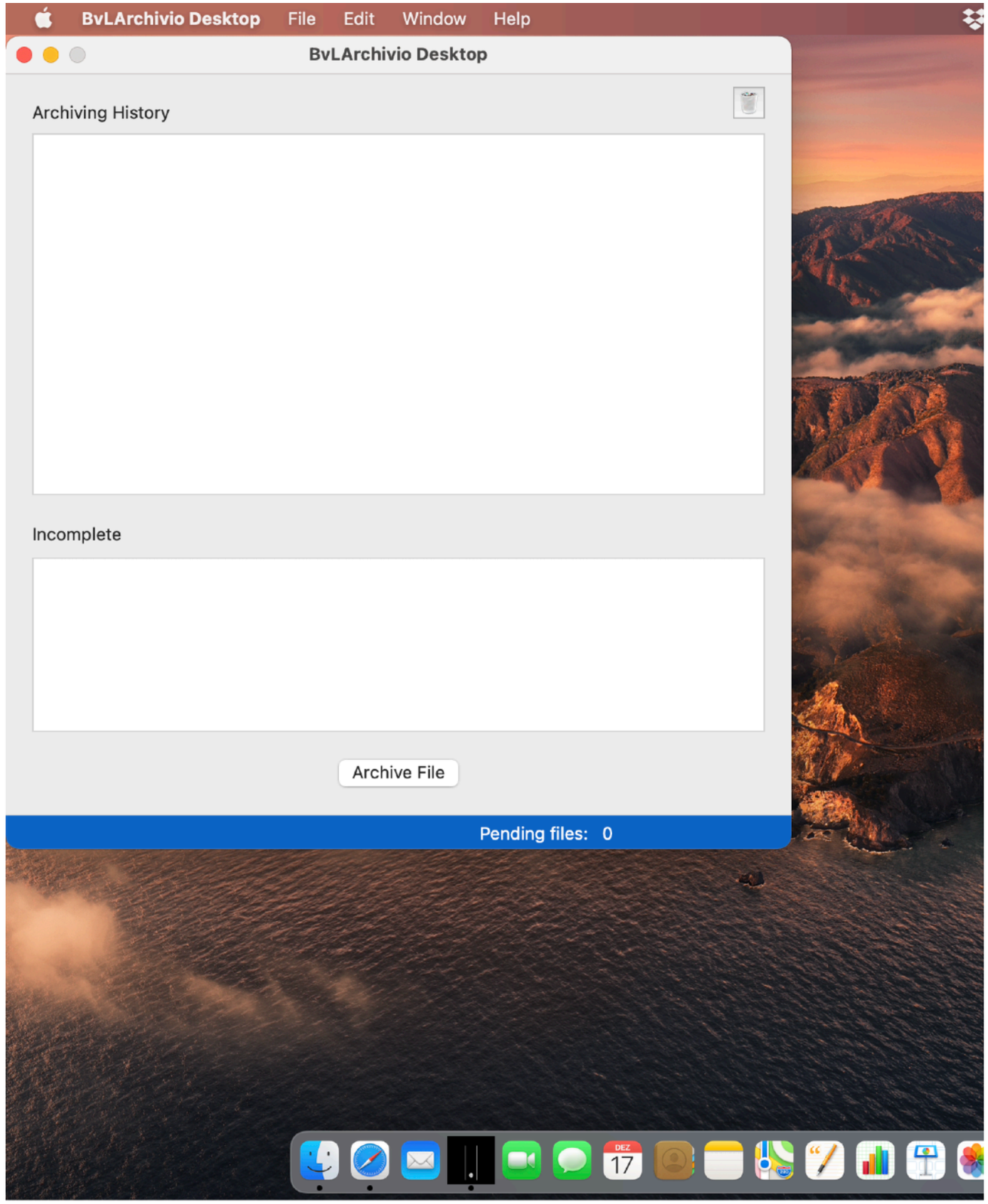
1. Select a file and keep the mouse button pressed. Now drag it onto the BvLArchivio program window. **Drag**
2. Release the mouse button to hand the file to BvLArchivio Desktop. **Drop**

Flexibility

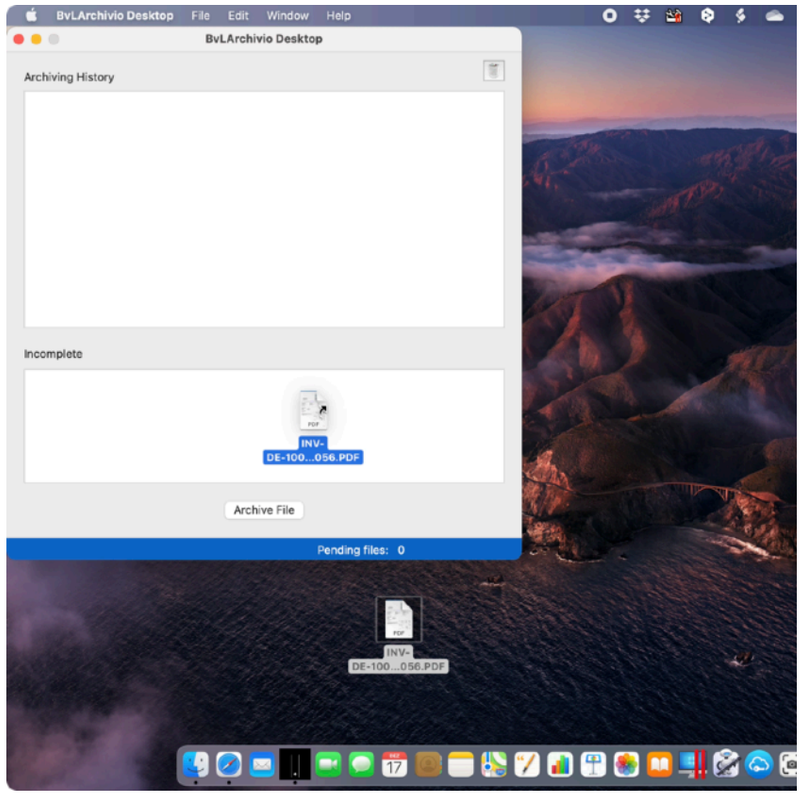
BvLArchivio Desktop App is flexible and provides several functions for audit-proof archiving.

There is the possibility to archive via

1. The menu option [File] [Archive] as well as via the button [Archive File] in the main program window.
2. Or via drag & drop.
3. Additional options are described in Chapter 5 ➡.

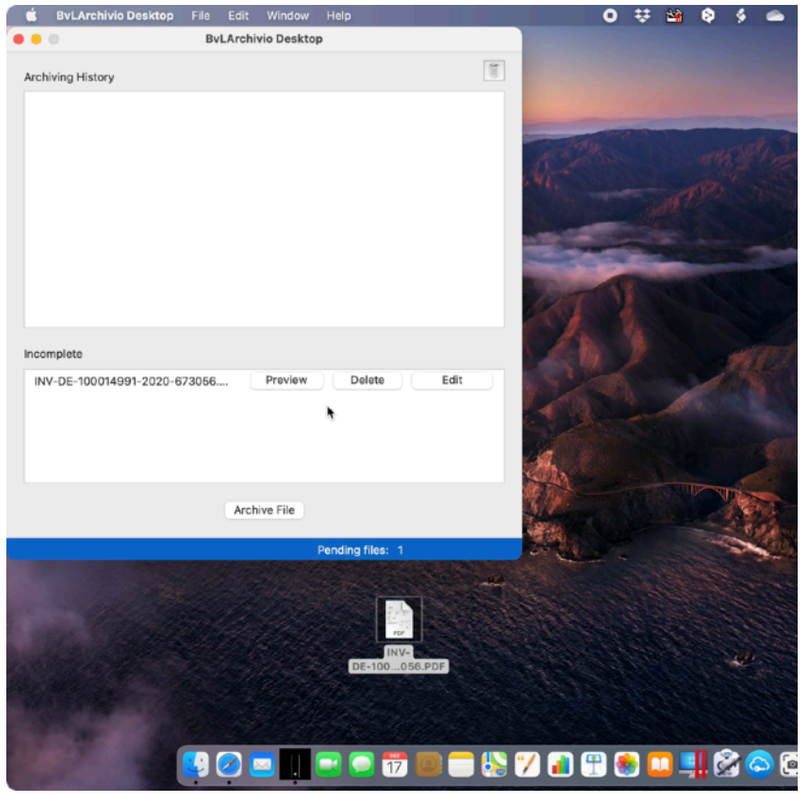


Archiving files with BvLArchivio Desktop App



Picture left:

1. A file is marked with the mouse and dragged to a target, the BvLArchivio Desktop window, with the mouse button pressed. **Drag**
2. The file is transferred to the window by releasing the mouse button. **Drop**

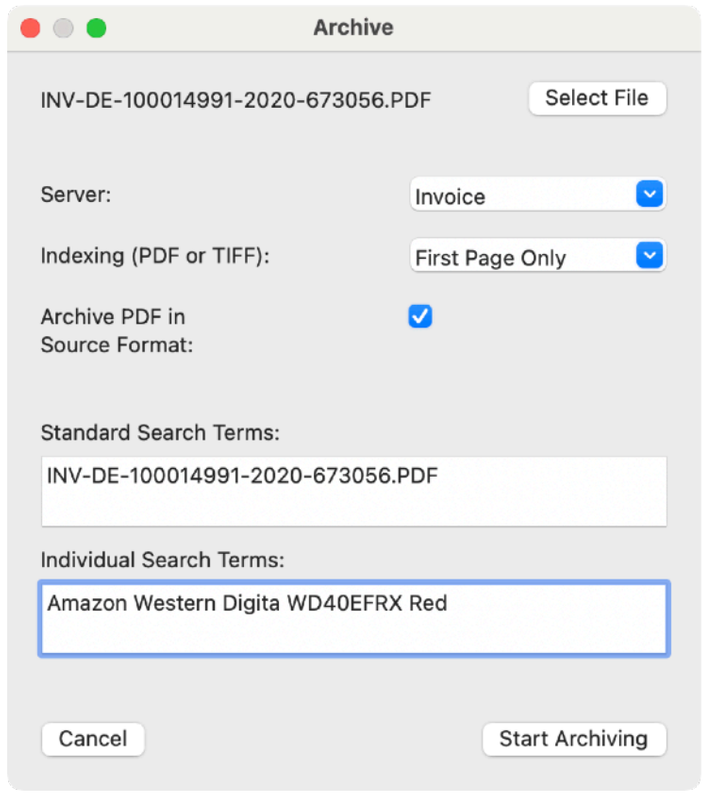


Picture centre:

The file is available in the Incomplete area after transfer and waits for input to complete archiving.

Click on [Edit] to open the Archive window.

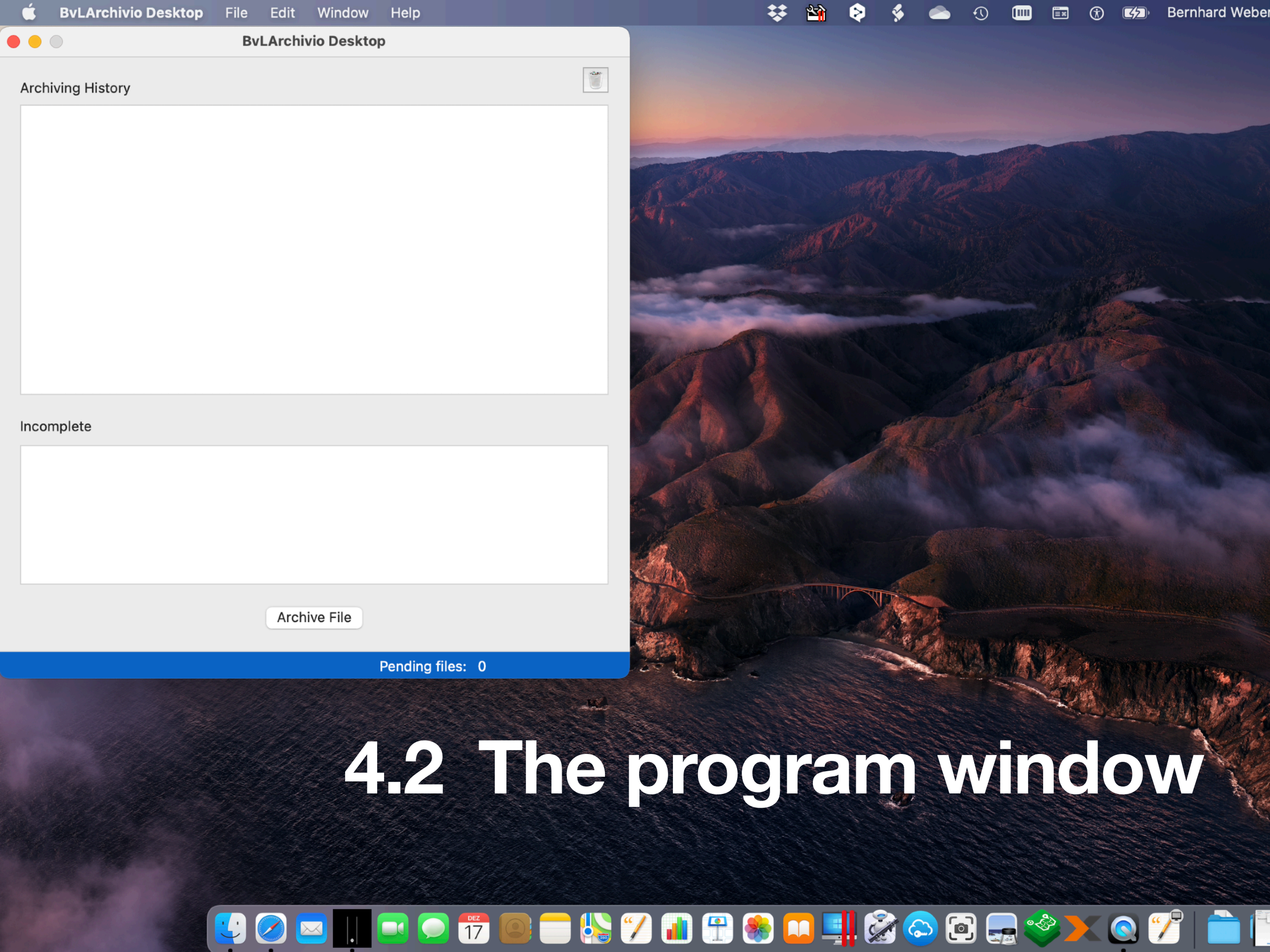
[Preview] and [Delete] are described in Chapter 4.2.3 ➡.



Picture right:

The input options are described in Chapter 4.1.1 ➡.

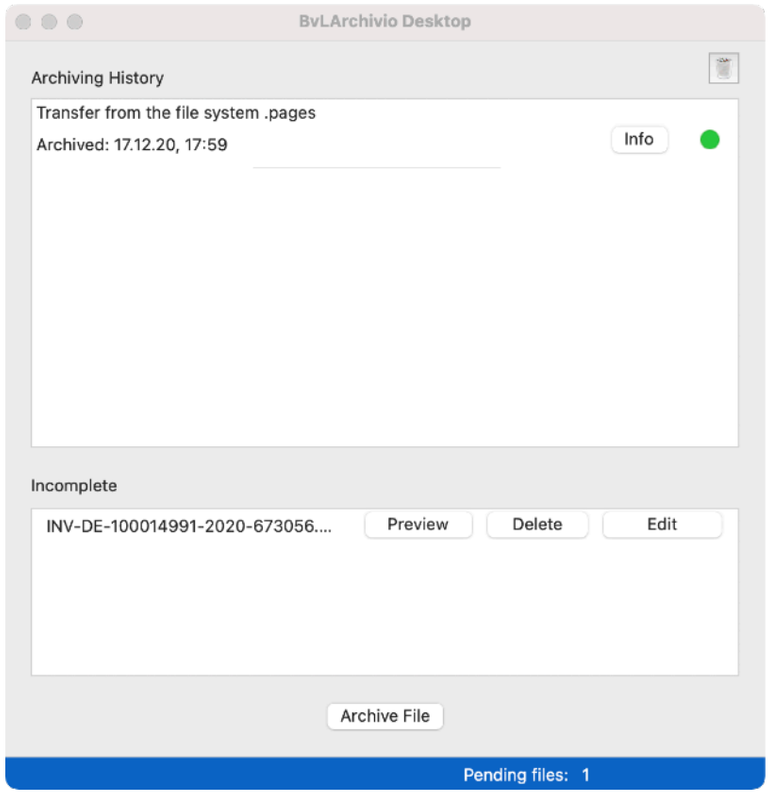
The overview of the processing is described in Chapter 4.2.1 ➡.

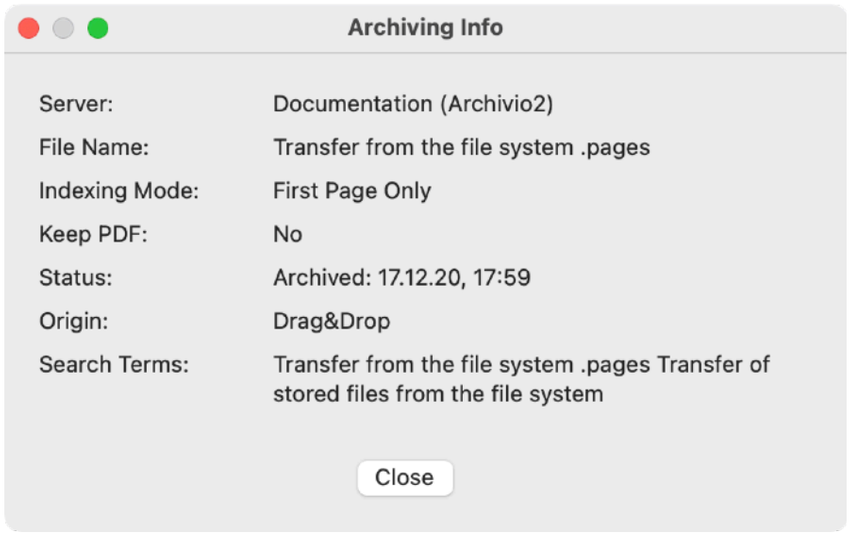

BvLArchivio Desktop File Edit Window Help
Bernhard Weber
BvLArchivio Desktop
Archiving History
Incomplete
Archive File
Pending files: 0
4.2 The program window

4.2.1 Info

[Info]: Shows how the file was transferred to the BvLArchivio system.

1. Server and File name: Where was the file archived. What was the original file name in an audit-proof manner of the the archived file.
2. Indexing Mode and Keep PDF: Only the first page was indexed and the original PDF was not archived.
3. Status and Origin: The file was archived on August 25, 2020 at 16:16 o'click and was transferred via drag and drop.
4. Search Terms: Additional search terms next to the file name, status and indexing.





4.2.2 Preview, Delete and Edit

The Incomplete area shows files that are still waiting for further input to complete the audit-proof archiving.

[Delete] (see Chapter 4.2.3. ➡) removes files that were transferred by mistake.

Caution: This process interrupts the archiving process and cannot be undone.

Preview] (see Chapter 4.2.3. ➡ shows the file.

Edit] (see Chapter 4.1.2. ➡) provides the possibility to complete the information for archiving.

Archiving files with the BvLArchivio Desktop App

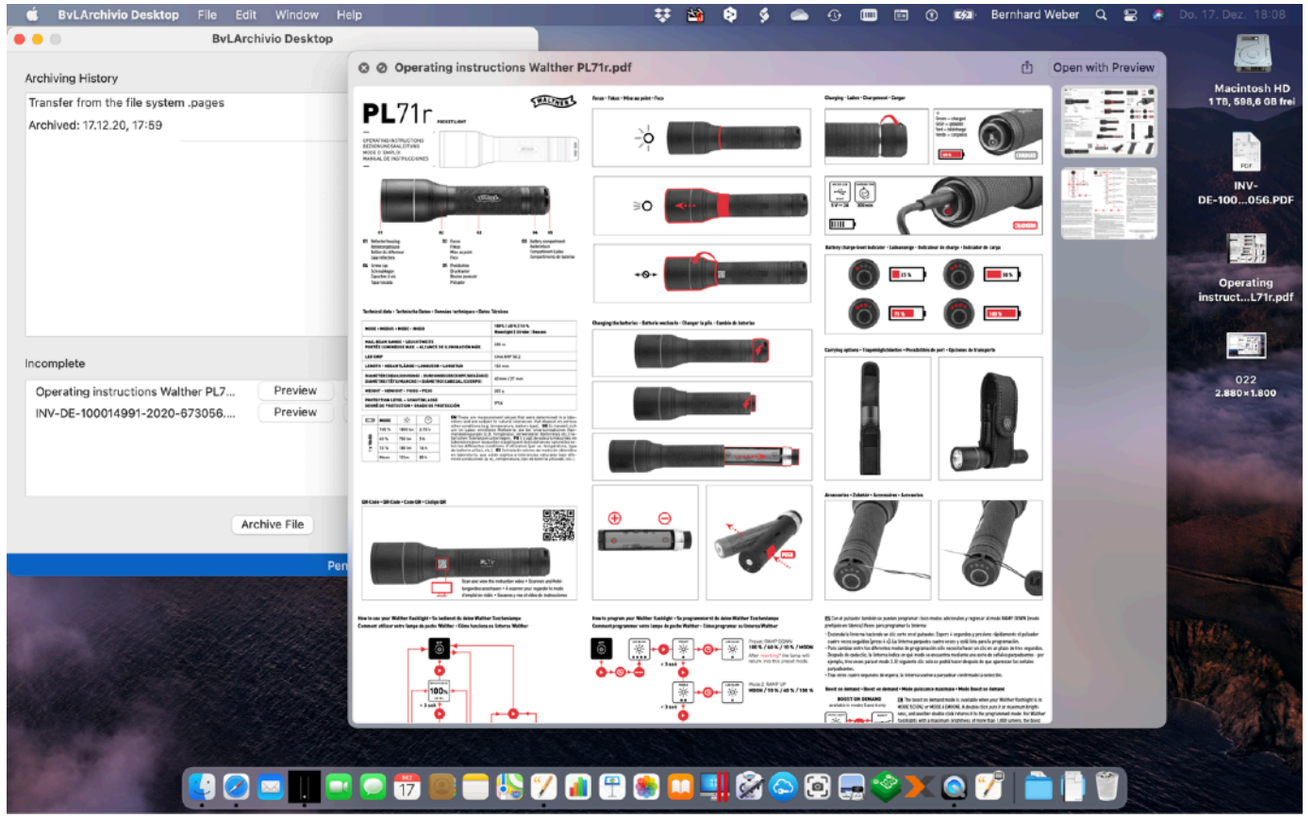
4.2.3 Preview and delete

If you do not remember the contents of the file, [Preview] helps if macOS allows visualization.

[Edit] is described in Chapter 4.1.2 image in the centre ➡.

If macOS allows visualization, [Preview] shows the contents of the file.

In the preview window you can share the file and open it with the resperctive application (in the picture on the right, Pages).

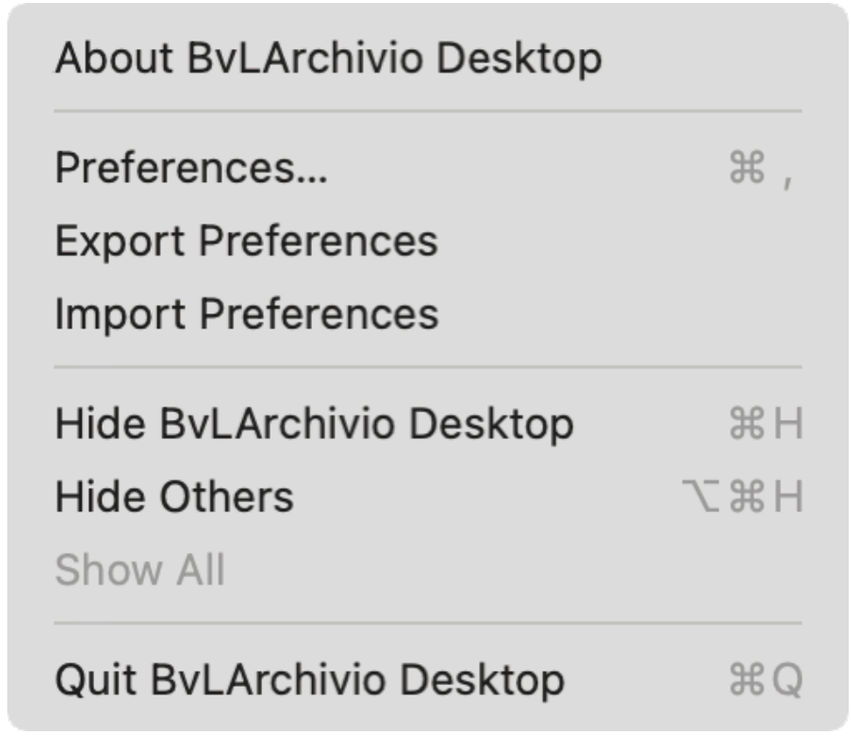


Files in the Incomplete section can be deleted by clicking on [Delete].

Caution: This process interrupts the archiving process and cannot be undone.

BvLArchivio Desktop
File
Edit
Window
Help
About BvLArchivio Desktop
Preferences... ⌘ ,
Export Preferences
Import Preferences
Hide BvLArchivio Desktop ⌘H
Hide Others ⌥⌘H
Show All
Quit BvLArchivio Desktop ⌘Q
4.3 The menu bar

4.3.1 BvLArchivio Desktop menu



[About BvLArchivio Desktop] shows the version of the app.

[Preferences...] or [command] + [,] opens the window where you setup archiving.

[Export Preferences] saves a file with the current settings for later use.

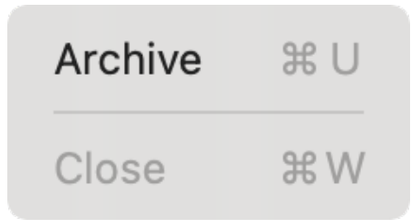
[Import Preferences] imports a setting file for the BvLArchivio Desktop App.

The export and import functions are used for backup and for easy installation on other macOS computers.

[Quit BvLArchivio Desktop] or [command] + [Q] closes the app.

The settings are described in Chapter 3 ➡.

4.3.2 File menu



Archive or [command] + [U] allows the selection of a file for archiving. The file is transferred to the BvLArchivio Desktop App when you use this function.

See Chapter 4.1 ➡ for a detailed description.

Close or [command] + [W] closes the archive window.

Chapter 5

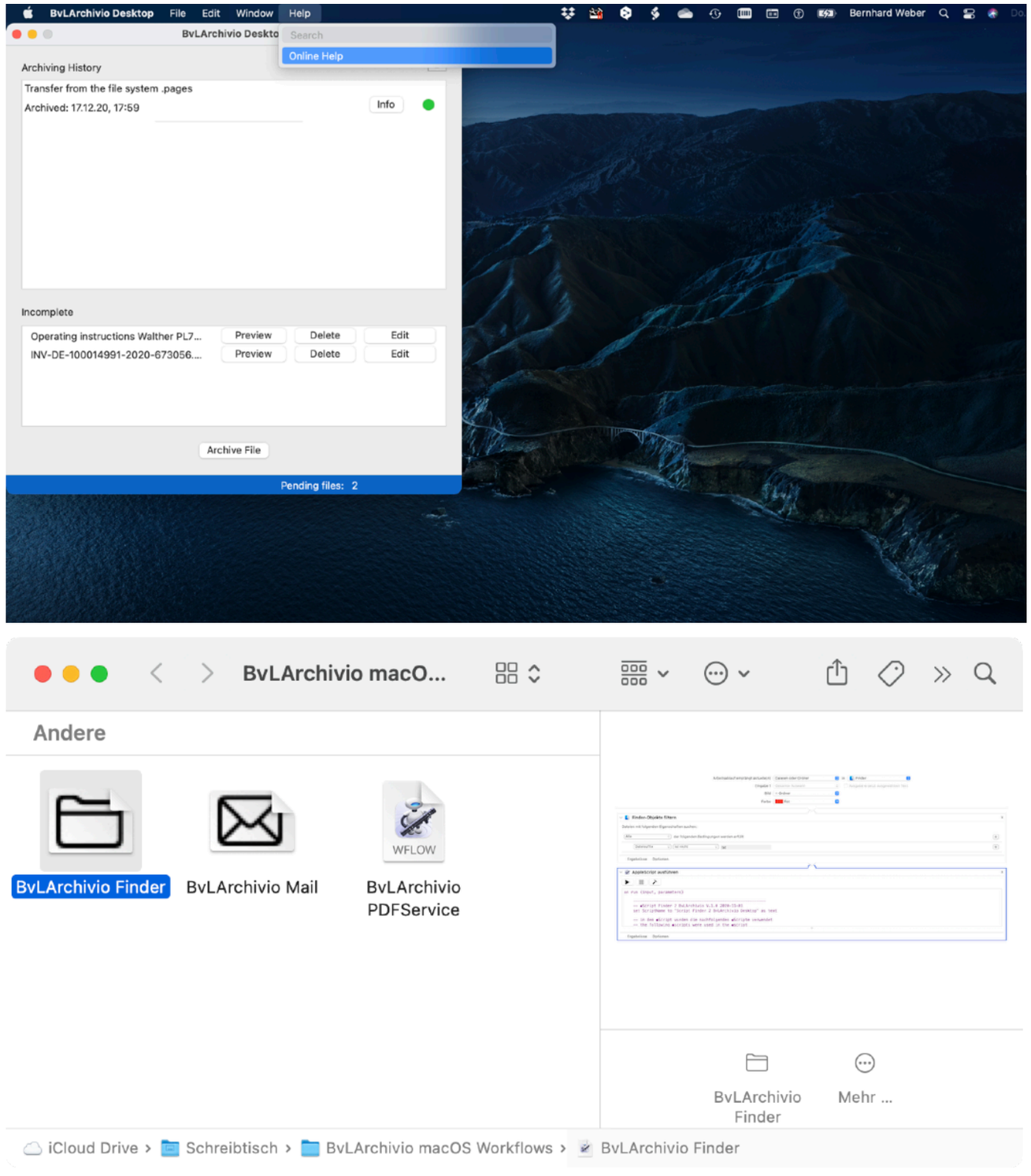
Automation

5.1 Automation

Automator & Script

It is possible to connect the macOS applications Finder, Mail and Print Output with BvLArchivio Desktop. Download the BvLArchivio macOS Workflows.zip from the download area ➡.

The usage of the automation is described on the following pages.



Finder, Mail and PDF Workflow

The file BvLArchivio macOS Workflows.zip contains 3 automated processes:

- BvLArchivio Finder
- BvLArchivio Mail
- BvLArchivio PDFService

5.2 Archiving data with macOS Finder

BvLArchivio Finder

BvLArchivio Finder is an Automator quick action. Quick actions are workflows that can be added to Finder, Touch Bar and the Services menu.

The extension works together with the Library of the BvLArchivio Desktop App.

The services are stored in user > library (~/Library/Services).

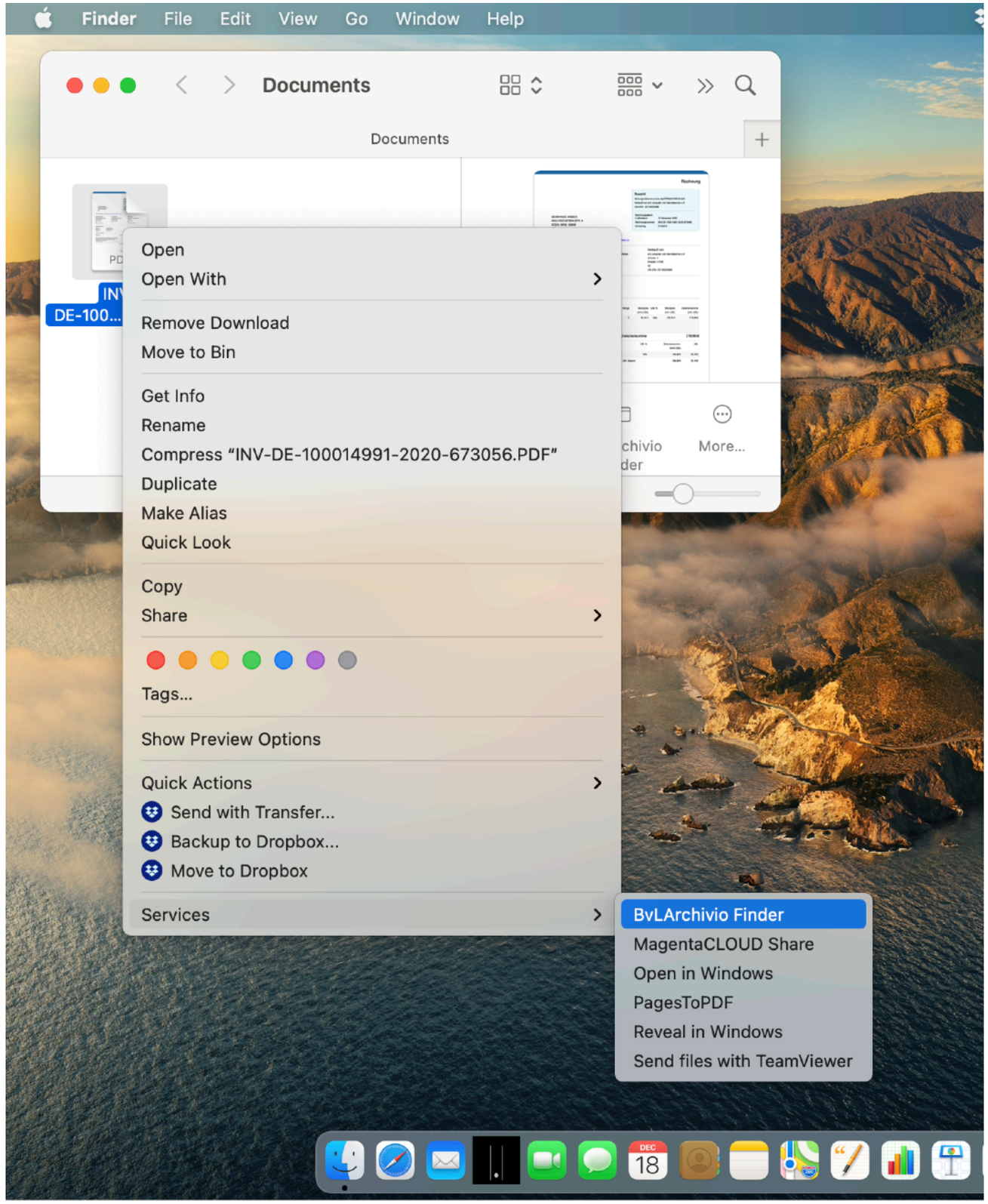
Workflow with the Finder

The file is marked with the right mouse click. In case you use the trackpad it is a gesture (tap briefly with two fingers).

BvLArchivio Finder is selected in the menu item Services.

The dialogue for audit-proof filing is activated.

- The rest of the procedure is described in Chapter 5.5 ➡.
- Chapter 6 ➡ describes the installation.



5.3 Archiving print data with macOS Printer

BvLArchivio PDFService

BvLArchivio PDFService is a plug-in for printing created with Automator.

Plug-ins for printing are workflows that are available in the print window.

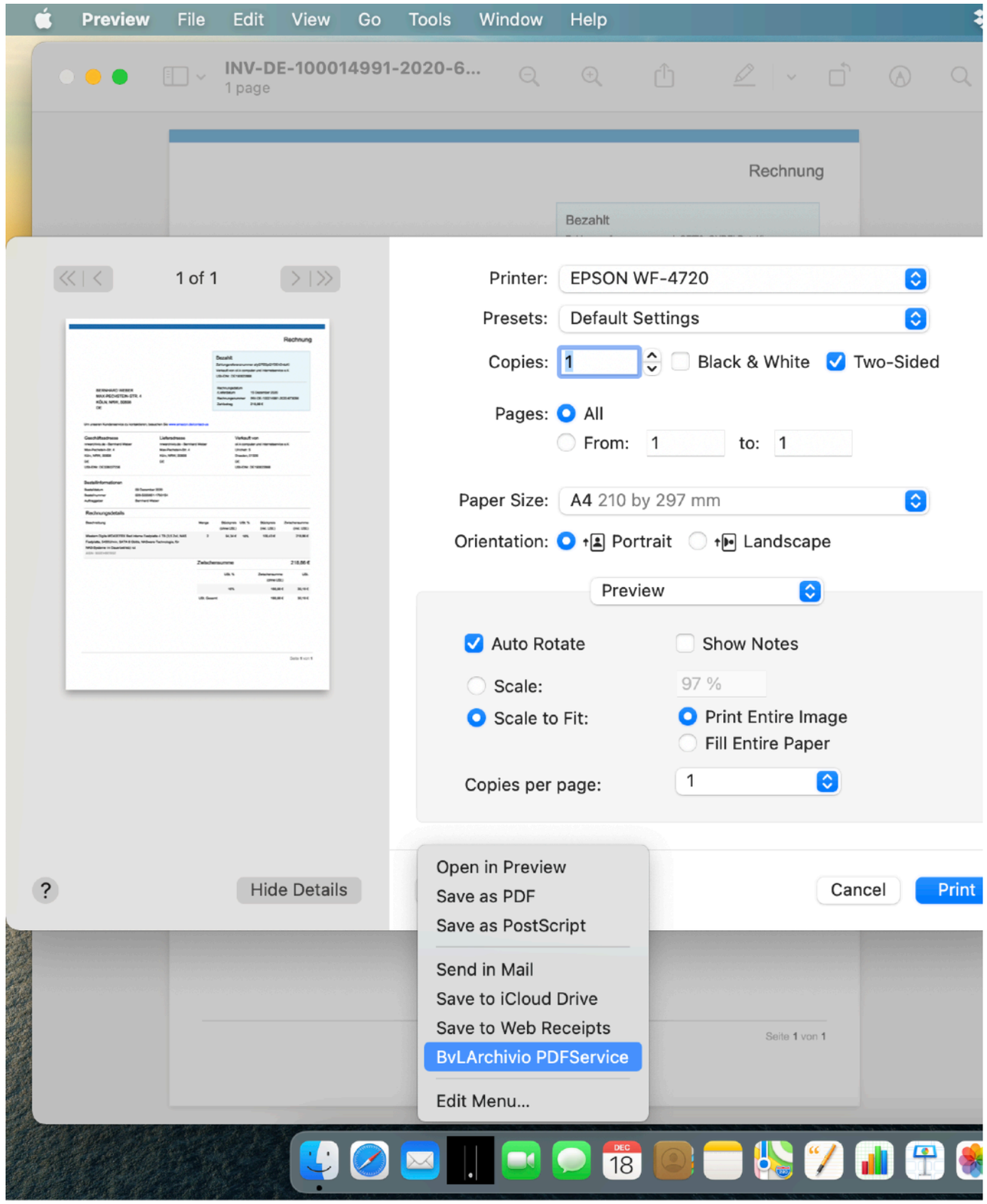
The plug-in works with the library of the BvLArchivio app and is stored in user > library (~/Library/PDF Services)

Workflow in the print dialog

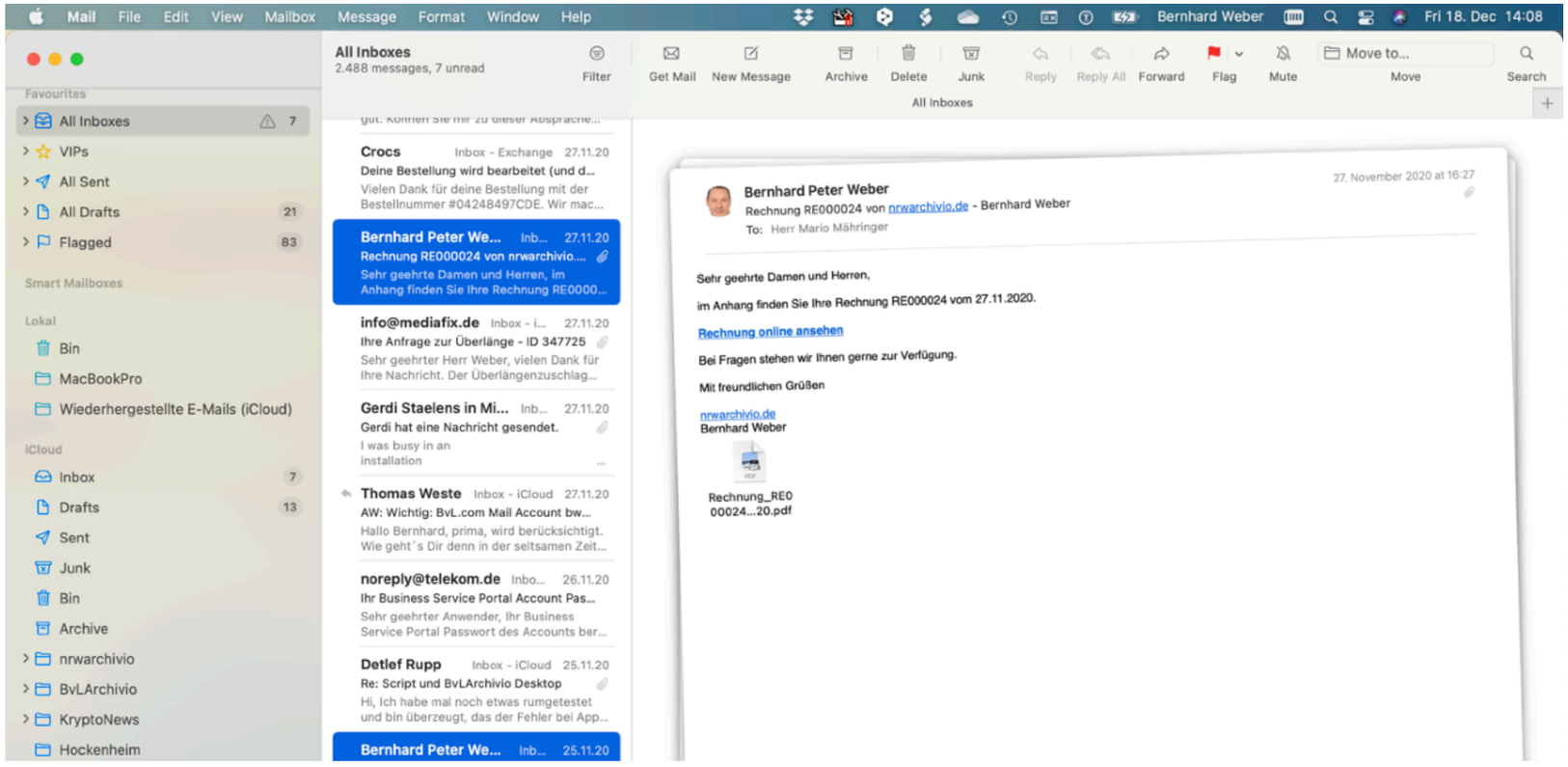
The print dialogue is selected in the menu bar with [File] and [Print].

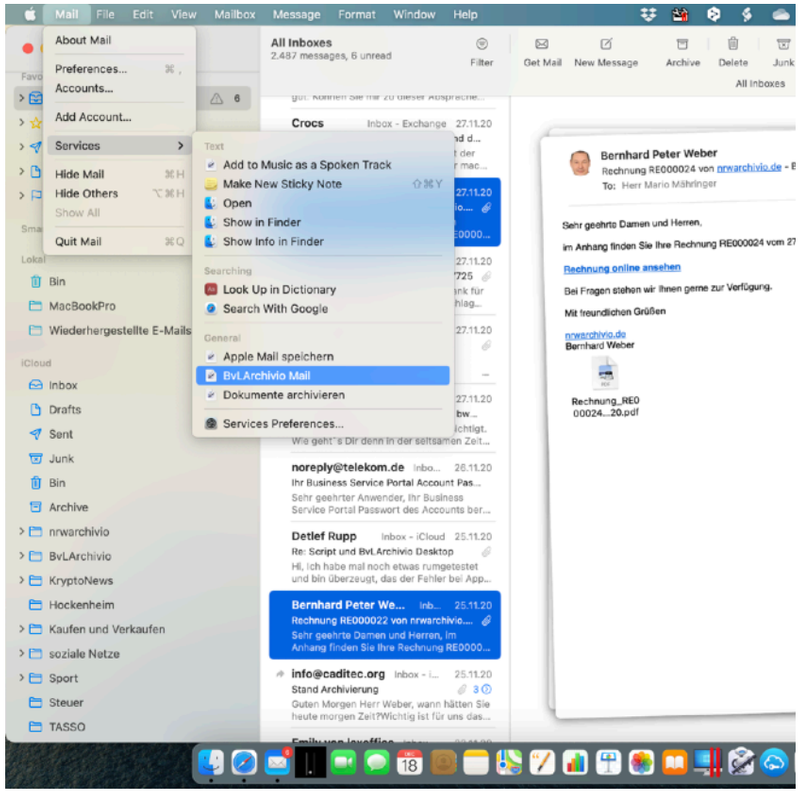
The dialogue for audit-proof filing is activated.

- The rest of the procedure is described in Chapter 5.5 ➡.
- Chapter 6 ➡ describes the installation.



5.4 Archiving emails with macOS Mail





BvLArchivio Mail

BvLArchivio Mail is an Automator quick action. Quick actions are workflows that can be added to Finder, Touch Bar and the Services menu.

The extension works with the Library of the BvLArchivio Desktop App.

The services are stored in the user's library (~/Library/Services).

Picture left

Workflow with Mail

In Mail you can select several e-mails at a time for archiving.

Picture right

Audit-proof filing is triggered in the menu bar with [Mail], [Services] and [BvlArchivio Mail]. During the process, the e-mails are marked with a red flag. After successful transfer, the red flag is replaced by a green flag.

The rest of the procedure is described in Chapter 5.5 ➡.

Chapter 6 ➡ describes the installation.

5.4 Archiving emails with macOS Mail

Special features

In order to be able to retrieve an e-mail, the script Bv-LArchivio Mail has some special features.

The email is always archived with all attachments.

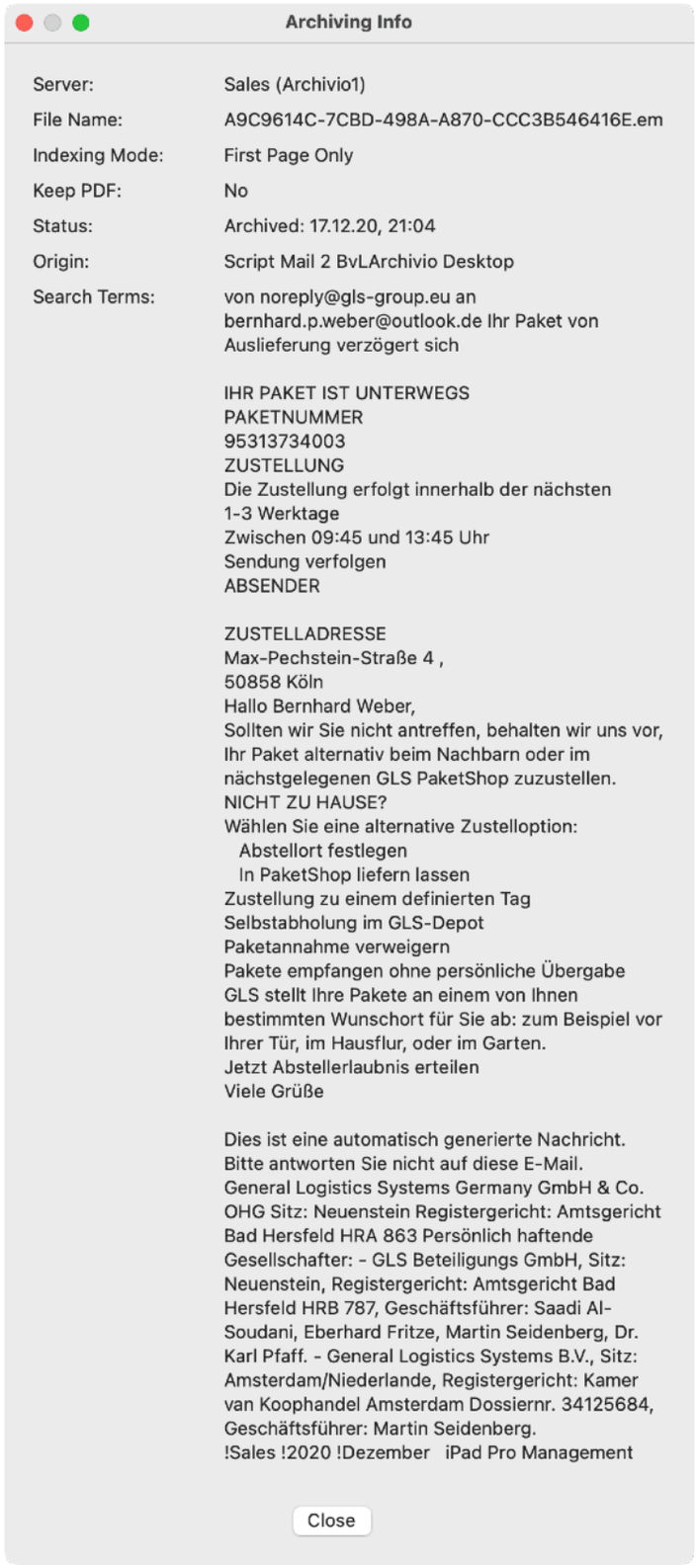
The script ensures that you can search for the comple-te content of the e-mail.

Search terms of the E-Mail:

- the address data
- the subject
- the time stamp
- and the e-mail text

Picture right

The picture shows an example via [Info] in the History window (see Chapter 4.2.1 ➡).



5.5 Common features of the automated processes

Finder, Printer & Mail

The two services and the printer plug-in work according to the same pattern.

The automated processes detect the localization of the installation. After detection, dialogues are displayed in English, German, Spanish, Italian or French. If the system works with another language, the dialogues are in English.

Automatically added search terms

It is possible to assign fixed search terms to the file to be archived.

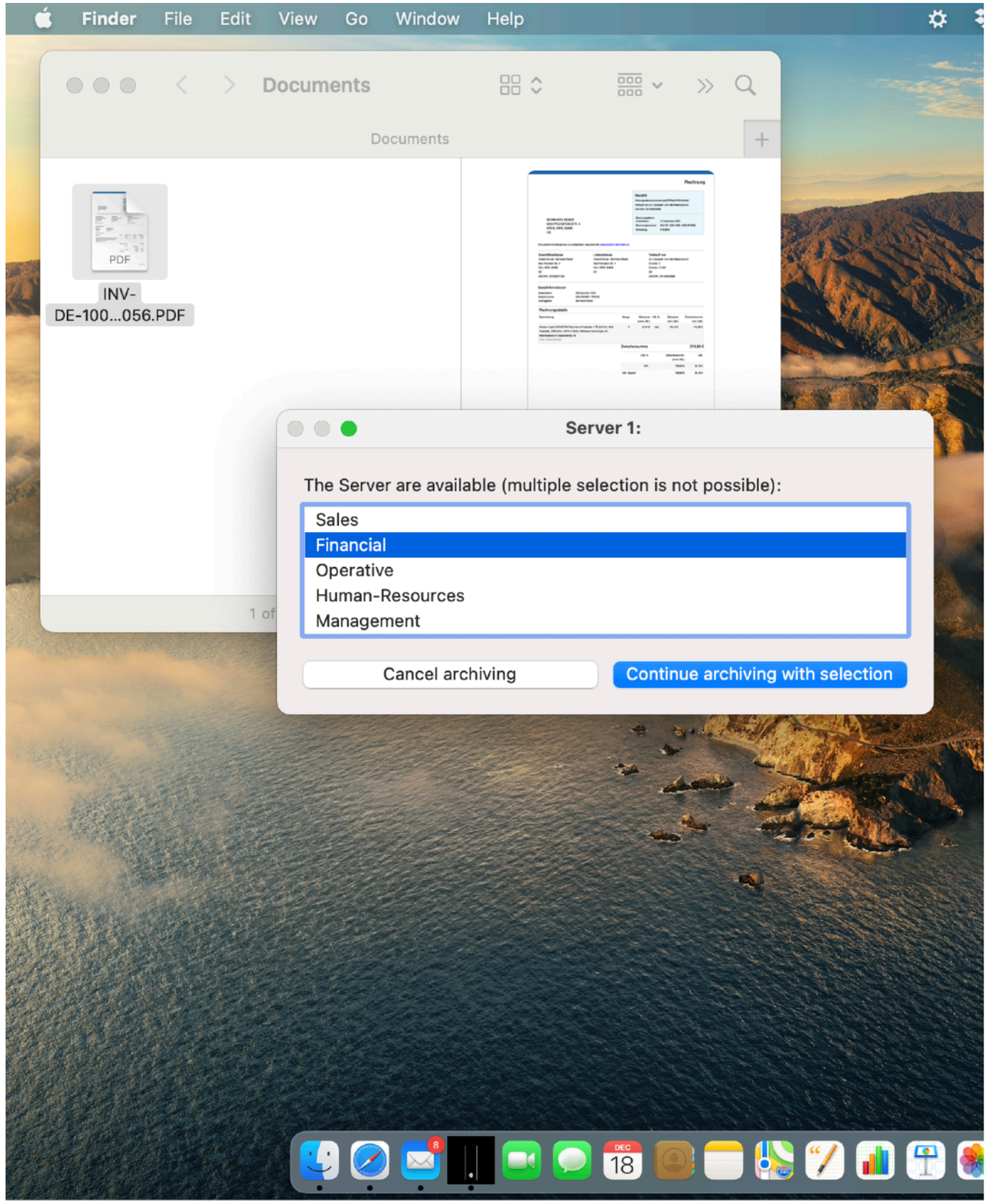
The translation and the automatic search terms can be switched on and off in the script or set to a fixed language.

Additional search terms

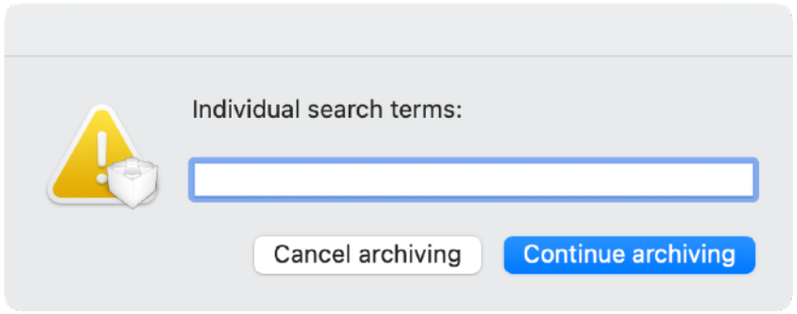
The individual search terms are added by entries in the dialogue.

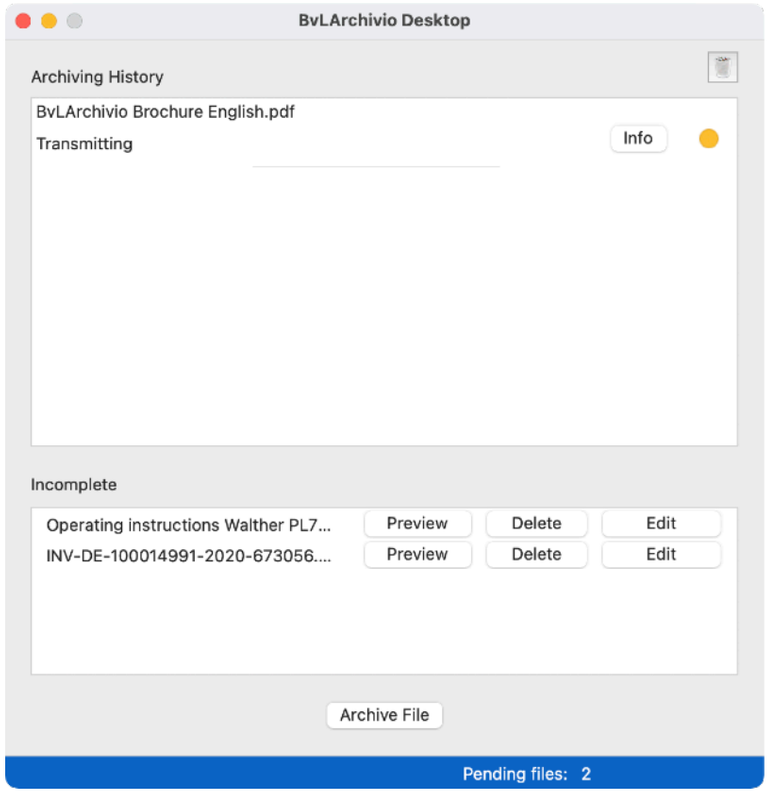
The commonalities are applied in the following automatic processes.

- Archiving via the Finder (Chapter 5.2 ➡)
- Archiving a printout (Chapter 5.3 ➡)
- Archiving via Mail (Chapter 5.4 ➡)



5.5 Common features of the automated processes





Picture left

The archiving location

The archiving location is selected in the window. The options are [Cancel archiving] and [Continue archiving with selection].

Additional information on the archiving location

Chapter 3.2 ➡ Settings, Configure FTP input

Chapter 3.5 ➡ Example - Department

Chapter 3.6 ➡ Example - Document

After clicking on [Continue archiving with selection], the next dialogue appears.

Centre image

The dialog Individual search terms: Allows for adding additional keywords.

Individual search terms are necessary in case the recognition process (OCR) fails to detect any search terms.

Note: Only PDF anf TIFF files are suitable for OCR.

[Cancel Archiving] and [Continue Archiving] is available.

After clicking on [Continue Archiving], the files are made available to the BvLArchivio Desktop App.

Picture right

In the History window you can see the archiving progress.

[Info] provides information about the status of the archiving.

Chapter 4.2.1 ➡ see [Info] in the history

Chapter 6

Installation of the automated processes

6.1 Installation of the automated processes

Installation

The BvLArchivio plus.zip is available in the download area ➡.

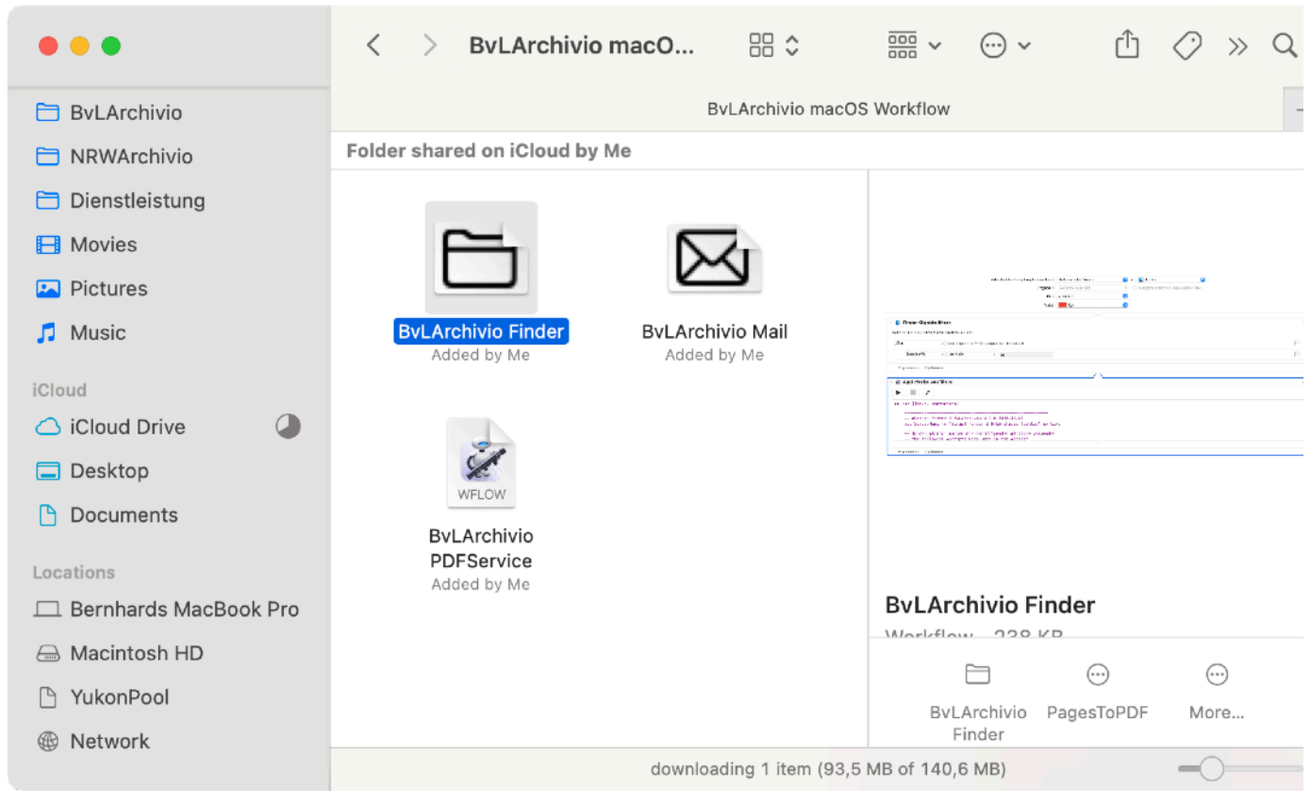
Double-click the respective [icon] to install the automated process.

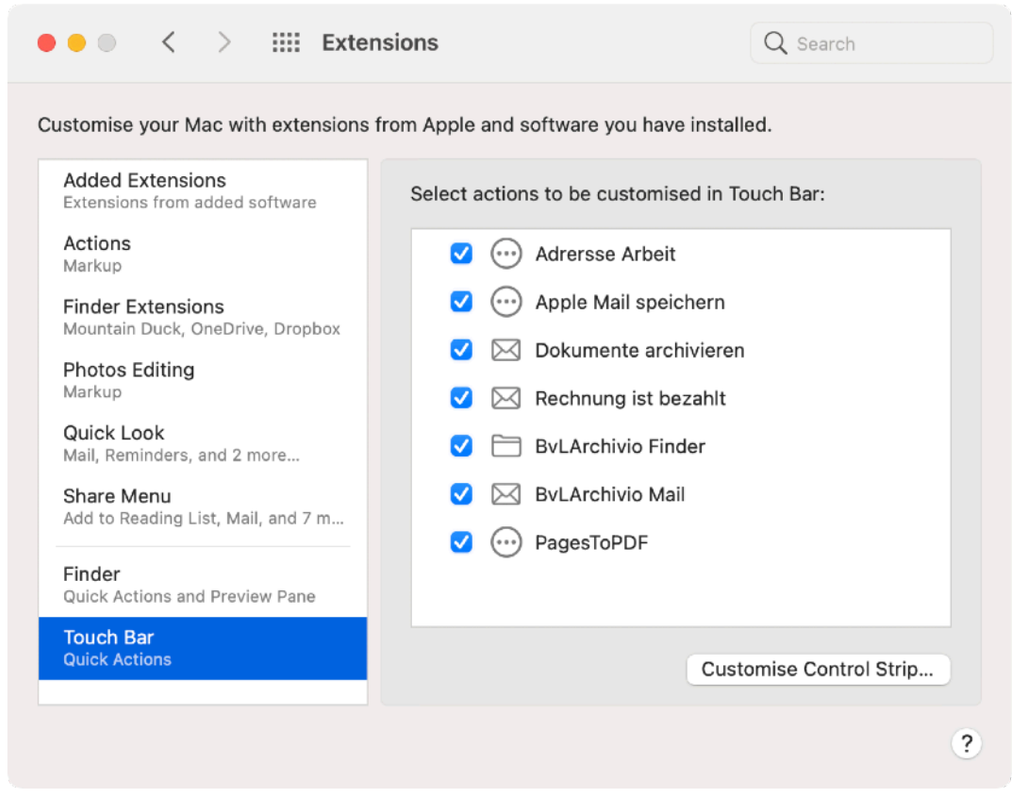
Note: [Install] moves the automated process to the library.

Special feature, the MacBook Touch Bar

On a MacBook Pro with Touch Bar, an additional window opens.

The Touch Bar customization is done in this window.





6.2 Automated processes, the first start

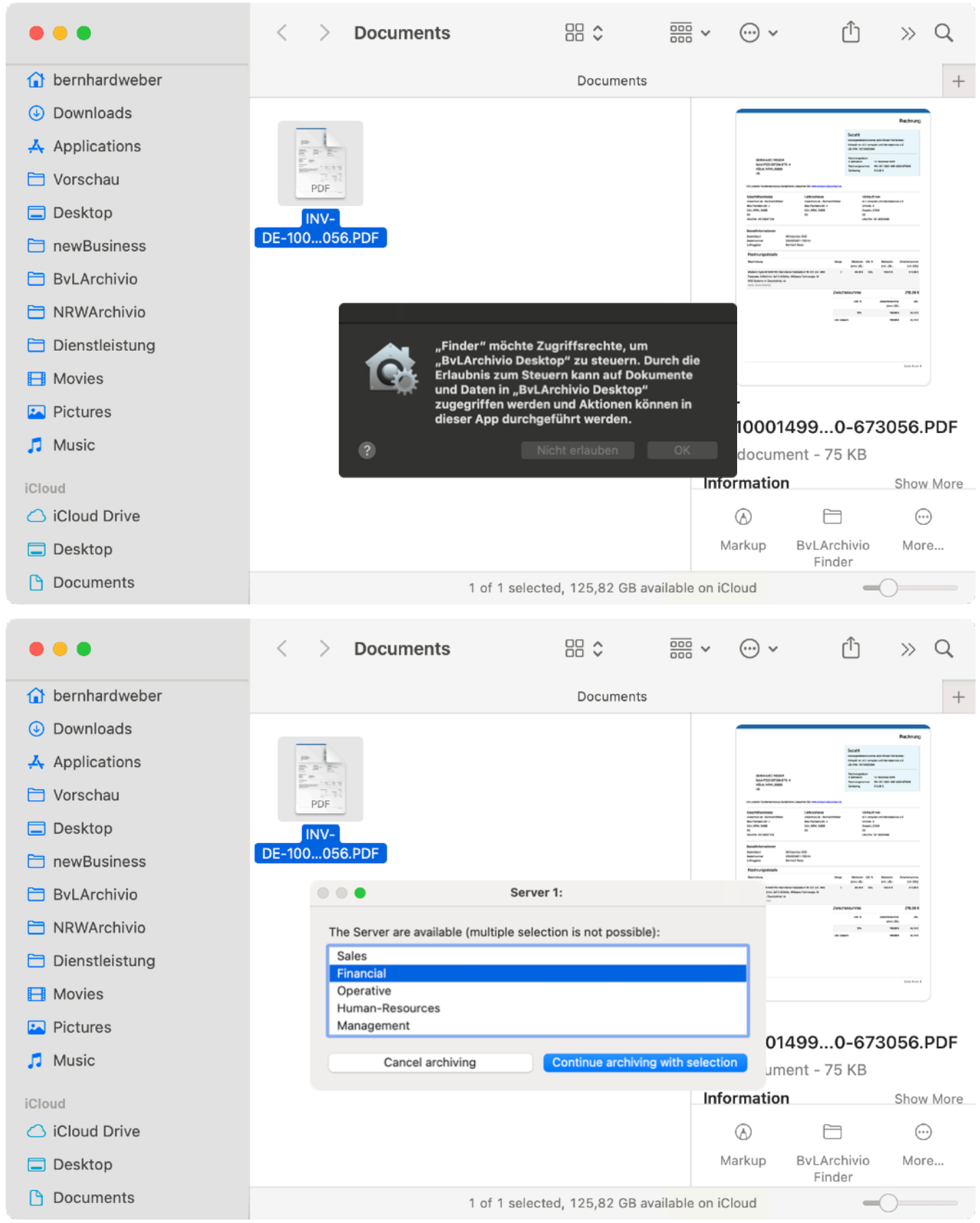
Access rights

When an automated process is used for the first time, the controlled application (in the example, the Finder) requests access rights.

These access rights must be confirmed with the [OK] button.

If the access rights are not granted, the automated process does not work.

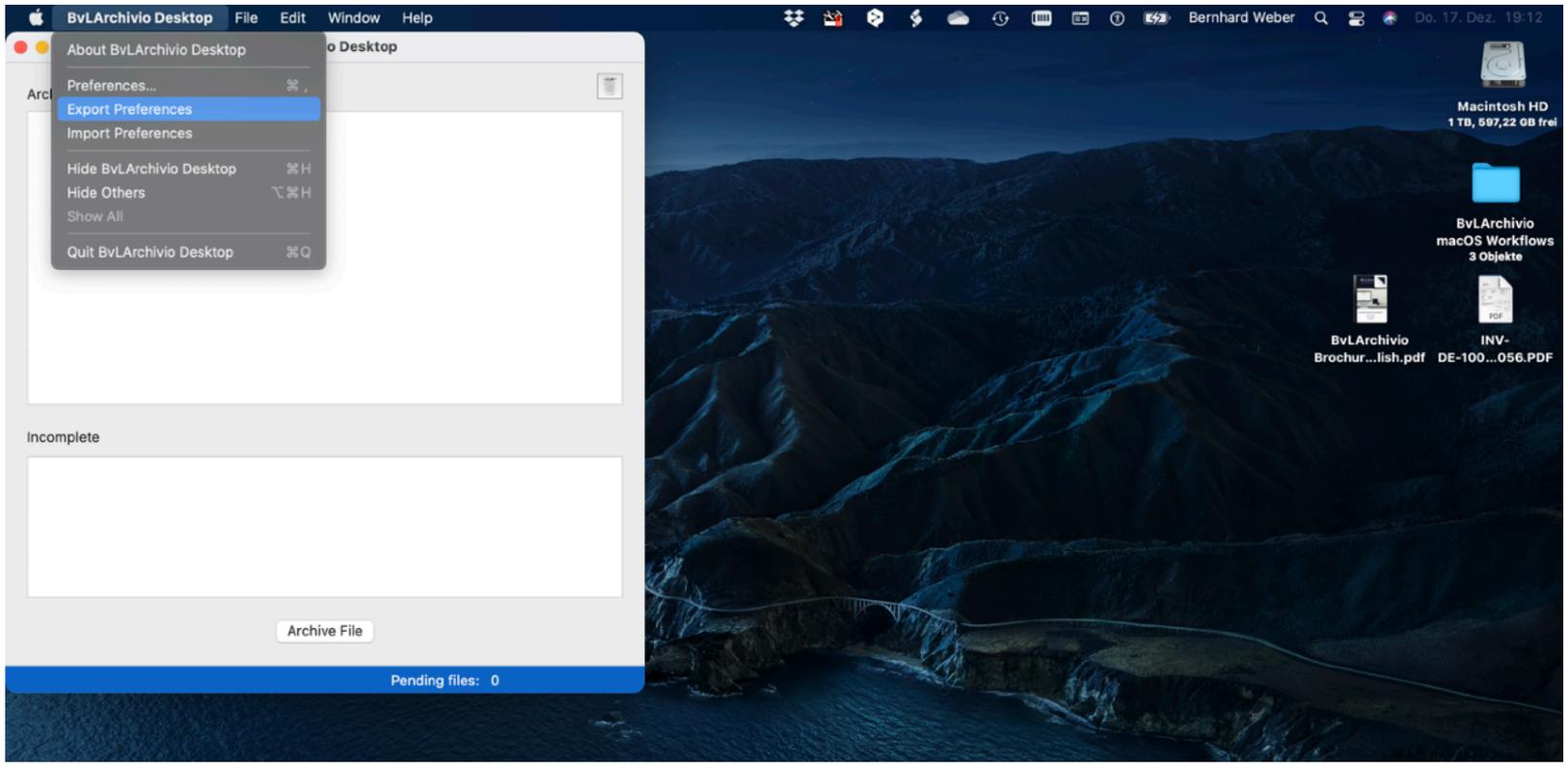
After granting access rights, the dialogue defined in the automated process appears.

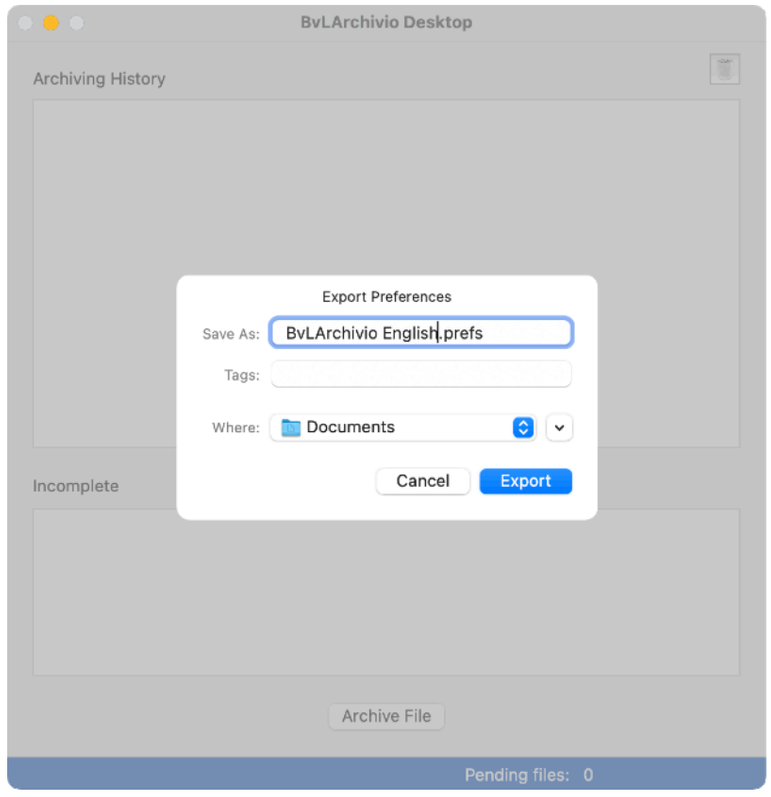


Chapter 7

Export and import settings

7.1 BvLArchivio Desktop App, Export Settings





The export and import allows for a quick installation on multiple computers.

Even after changing the settings, the person responsible can roll them out via a new .prefs file. The user then only has to import the file again.

It is also possible to provide each user with settings adapted to the workplace.

The import can be carried out by any user. This functionality does not require any system knowledge. Existing passwords are exported in encrypted form.

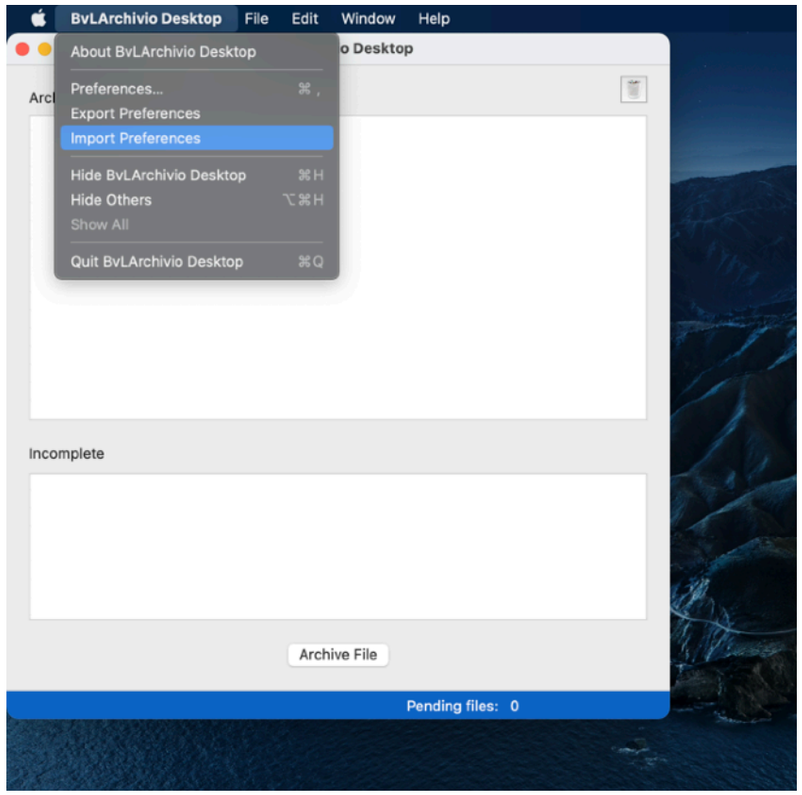
Export settings

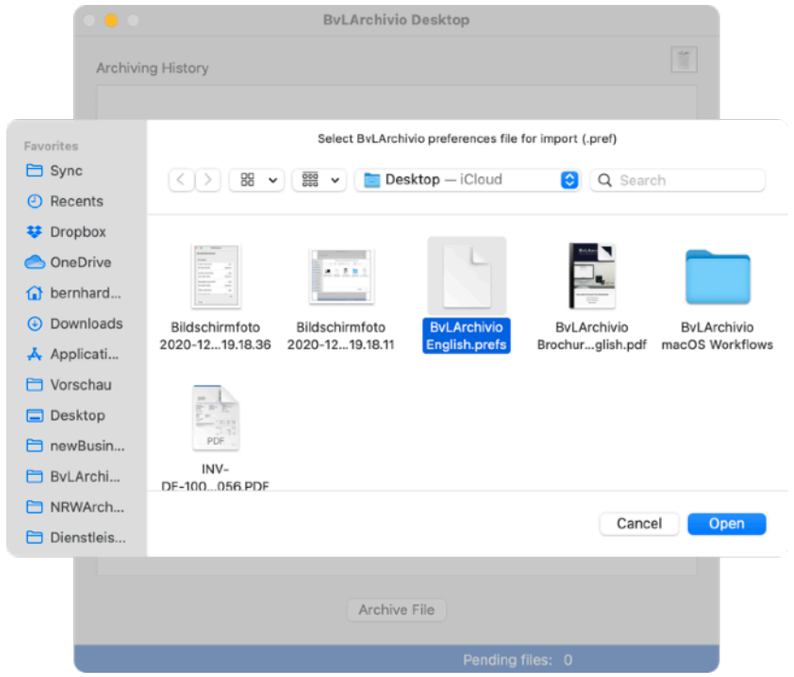
After clicking on [BvLArchivio Desktop], select [Export Preferences].

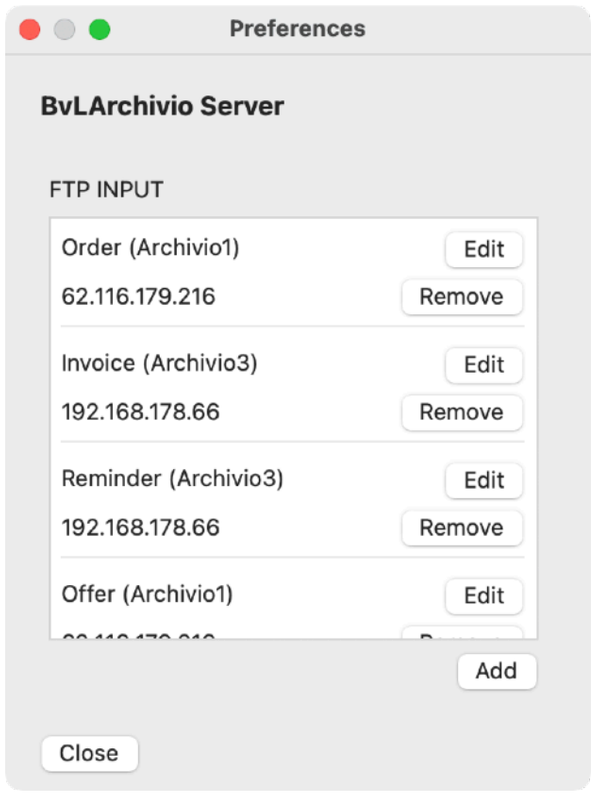
In the following window, BvLArchivio.prefs is suggested as the file name and a location for export. Both can of course be changed.

After clicking on the [Export] button, the file is available in the folder via the Finder.

7.2 BvLArchivio Desktop App, Import Settings







Picture left:

Import settings

Importing the settings speeds up and simplifies setups on multiple macOS computers.

Click on [BvLArchivio Desktop], and select [Import Preferences].

Picture center:

Select and open settings

In the Finder window, select the settings file (in the example BvLArchivio.prefs).

Note: The files always have the extension .prefs.

Click on [Open] to import (apply) all settings.

Caution: Existing settings will be changed!

Picture right:

Check settings

After the import of a preferences file it is recommended to check the changes.

Appendix

A.1 Contact

The team

BvL.com

Address: Müllerstraße 138 D, 13353 Berlin, Gemany

E-Mail: Service@BvLArchivio.de

Internet: www.BvLArchivio.com

Hotline: 0800 272 44 846

TouchingCode GmbH

We would like to thank TouchingCode GmbH, Berlin for programming the app.

www.touchingcode.com

nrwarchivio.de

Special thanks to nrwarchivio.de for the documentation and the macOS know how provided.

E-Mail: bernhard.weber@nrwarchivio.de

A.2 System requirement, the systems

Hardware & macOS

BvLArchivio Desktop App

Systems

MacBook Air und MacBook Pro
Mac mini, iMac und iMac Pro
Mac Pro

Operating systems

macOS 10.13 oder neuer, 64-Bit-Prozessor

A.3 System requirements to read the documentation

To read the documentation, Apple

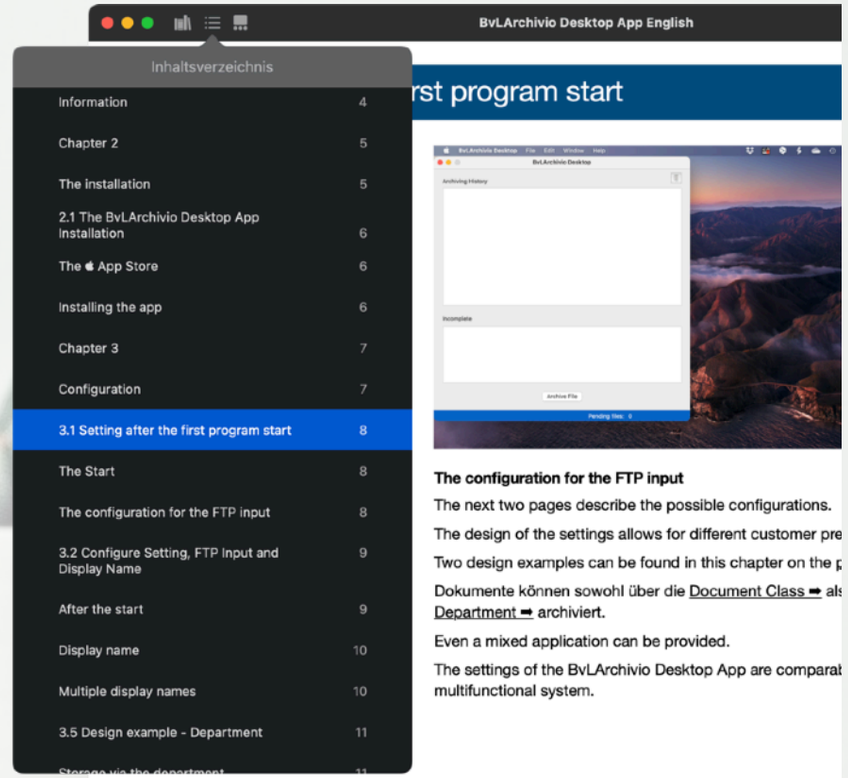
macOS

Standard
Books App (ePUB) - Recommended
Preview App (PDF)

iOS

Standard
Books App (ePUB) - Recommended
Preview App (PDF)

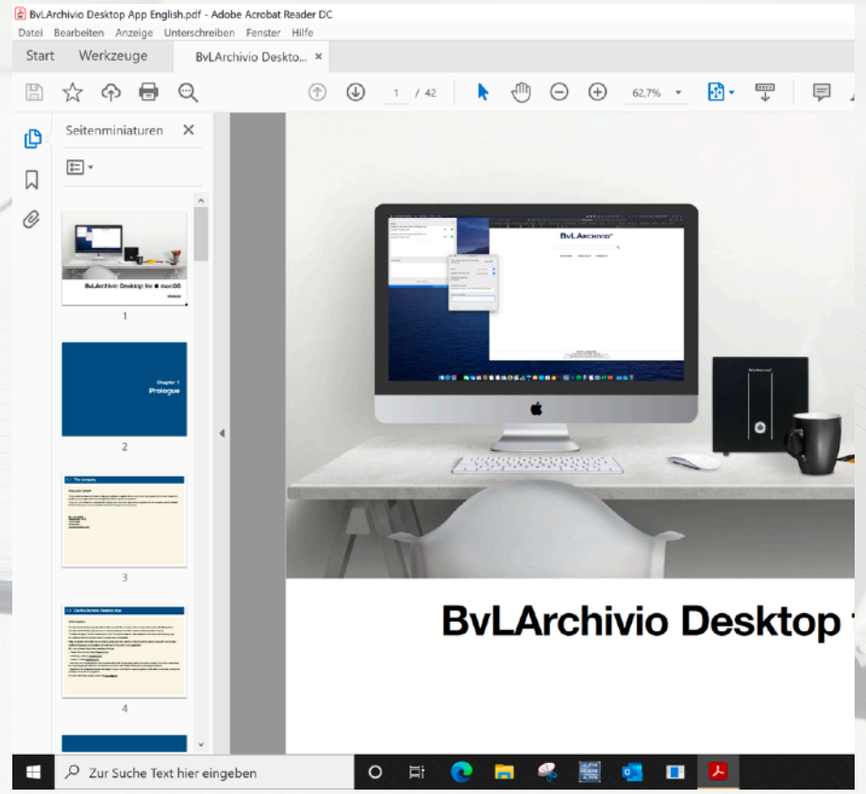
Optional macOS & iOS
Adobe Acrobat Reader DC (PDF)



To read the documentation, Microsoft

Preview App (PDF)

Microsoft Windows 10

Standard
Microsoft Edge (PDF)

Optional
Adobe Acrobat Reader DC (PDF)