

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 The 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 Automator¹ and AppleScript².

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

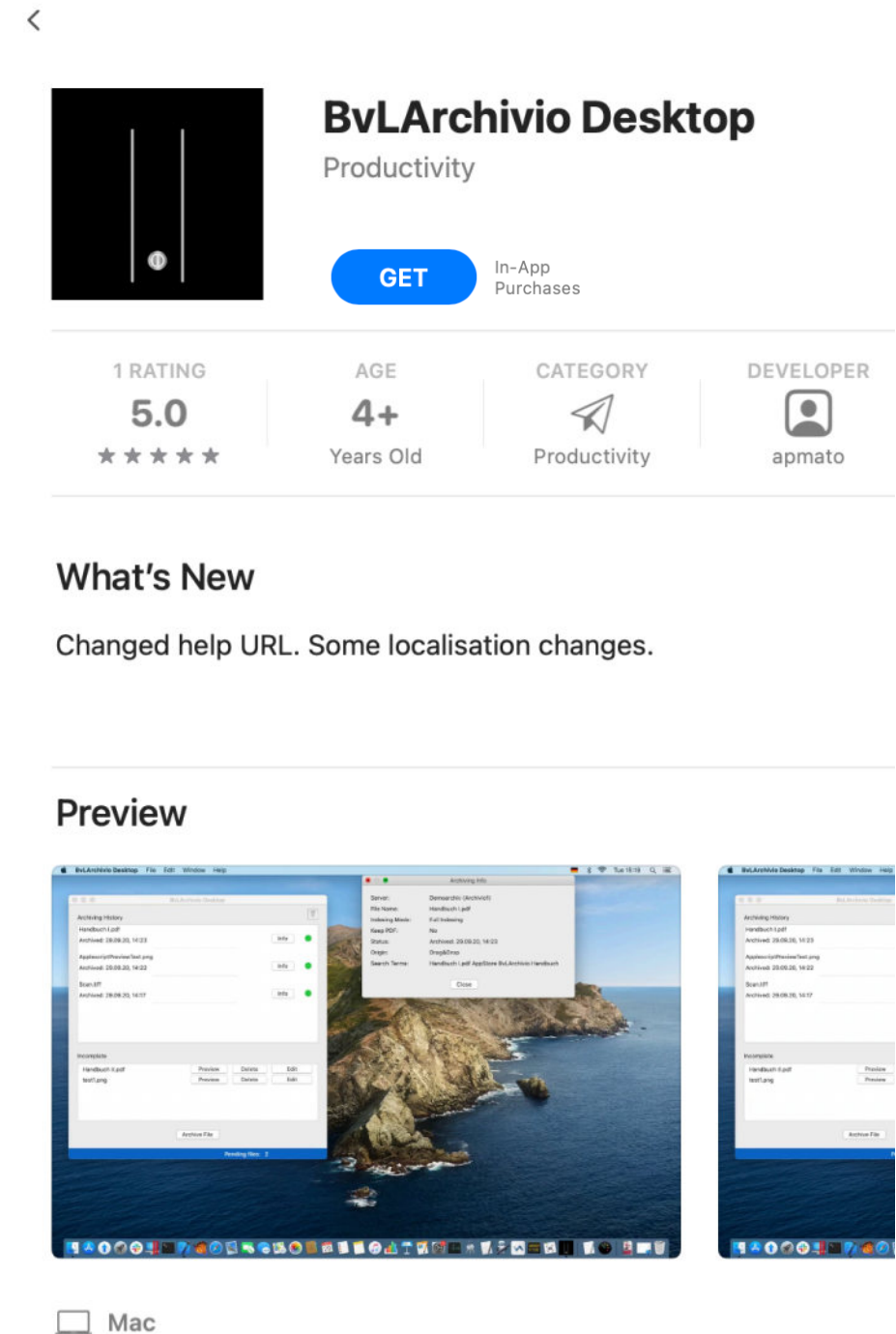
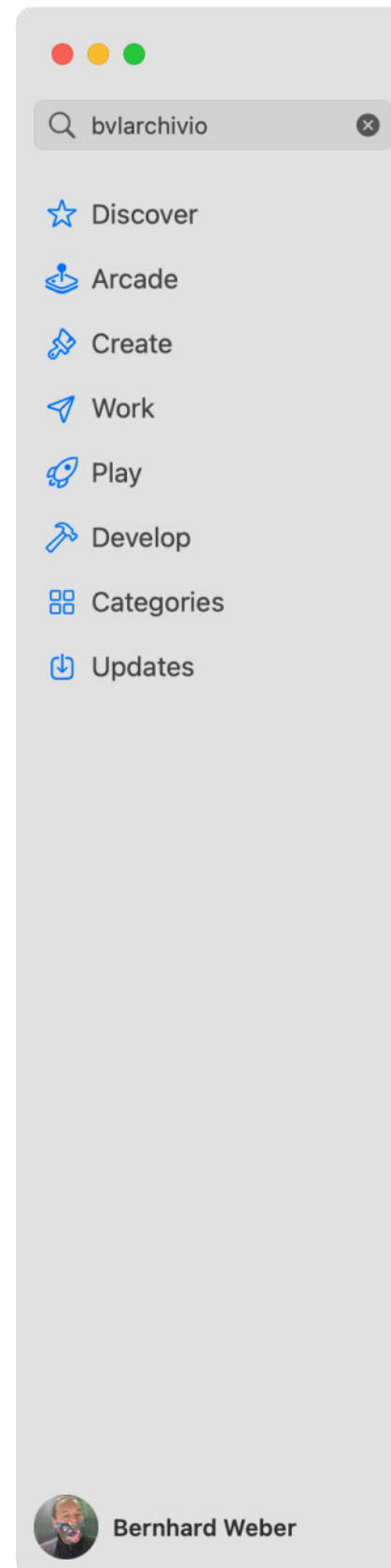


The App Store is a safe and trusted place to find and download apps. All apps from the App Store have a high standard of privacy, security and content. With the appropriate settings, the user is automatically provided with updates after installation.

Installing the app

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

1.  In-App Purchases
2.  In-App Purchases



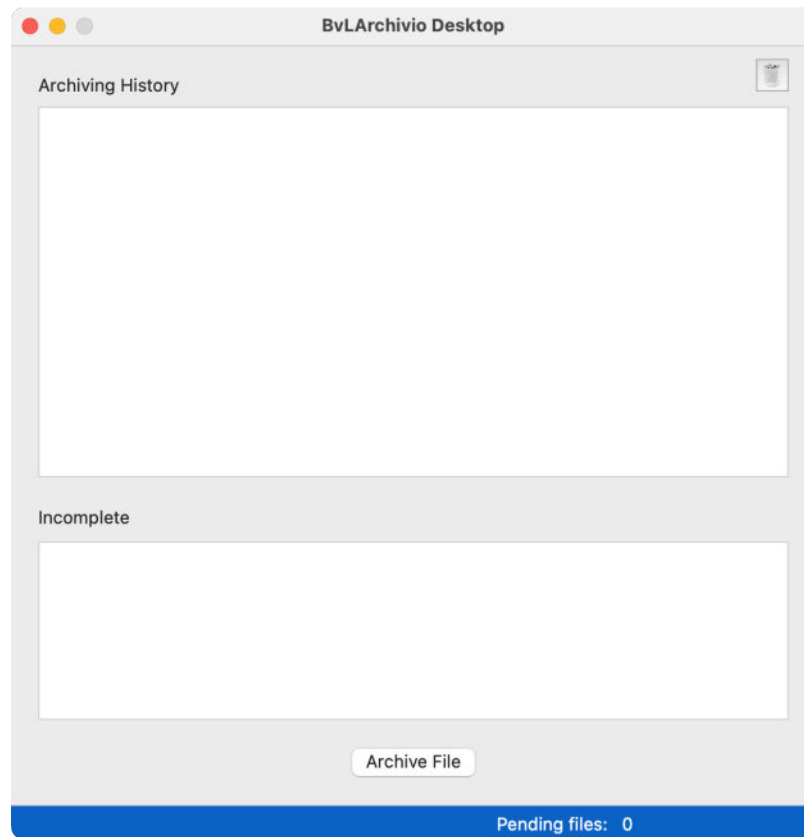
This is the official MacOS App for easy archiving of files with BvLArchivio.

BvLArchivio Desktop - MacOS App
With the BvLArchivio MacOS app you can archive all your file, e.g. PDF doc text documents, e-mails, images and videos automatically from your MacO

Chapter 3

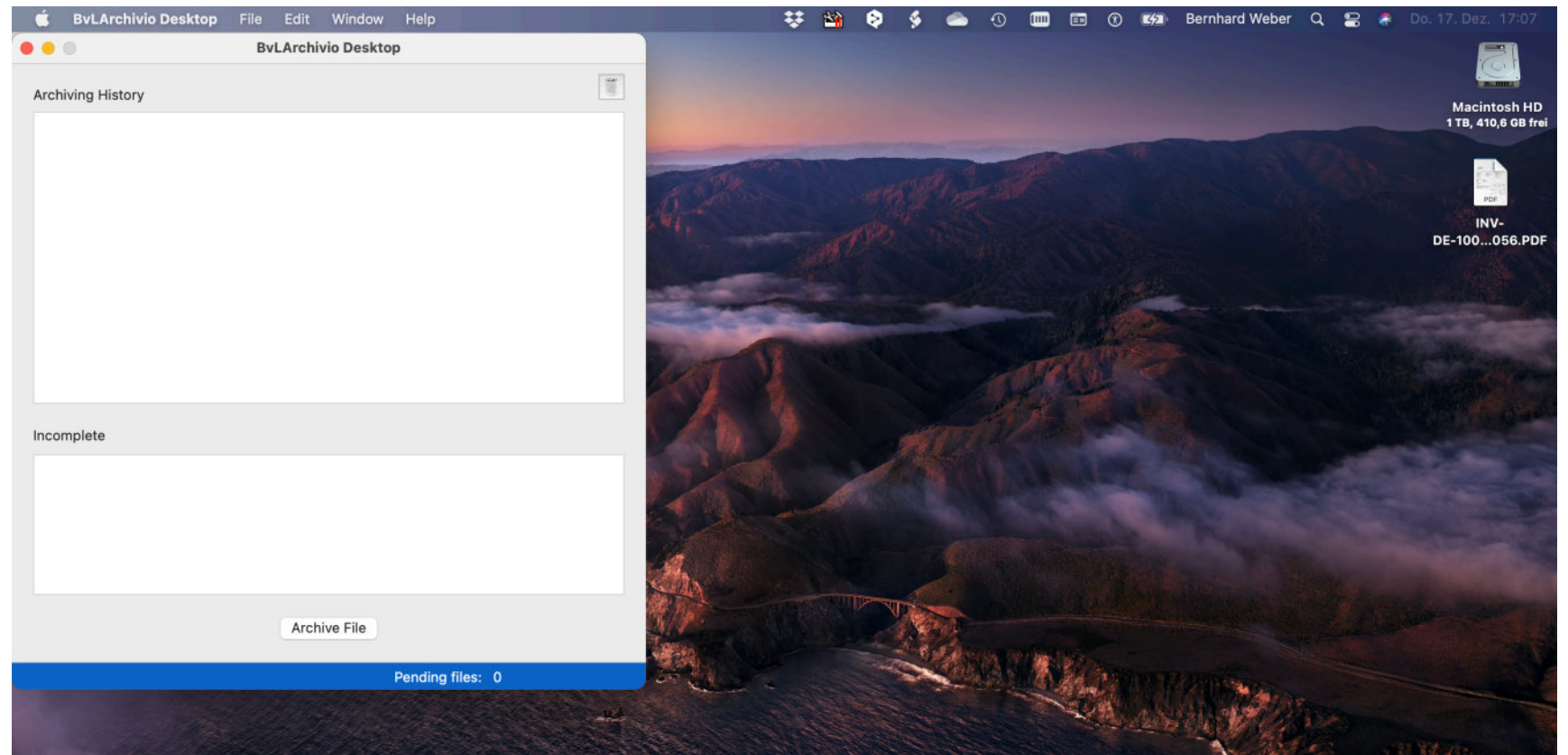
Configuration

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.

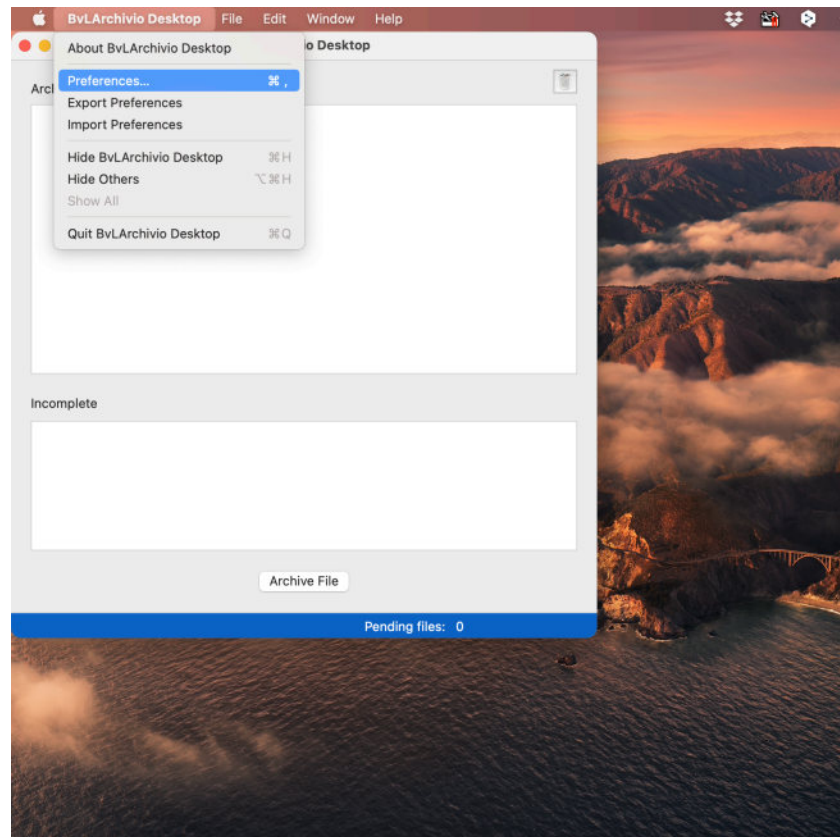
Two examples can be found in this chapters on the [pages 3.5 and 3.6 ➡](#).

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



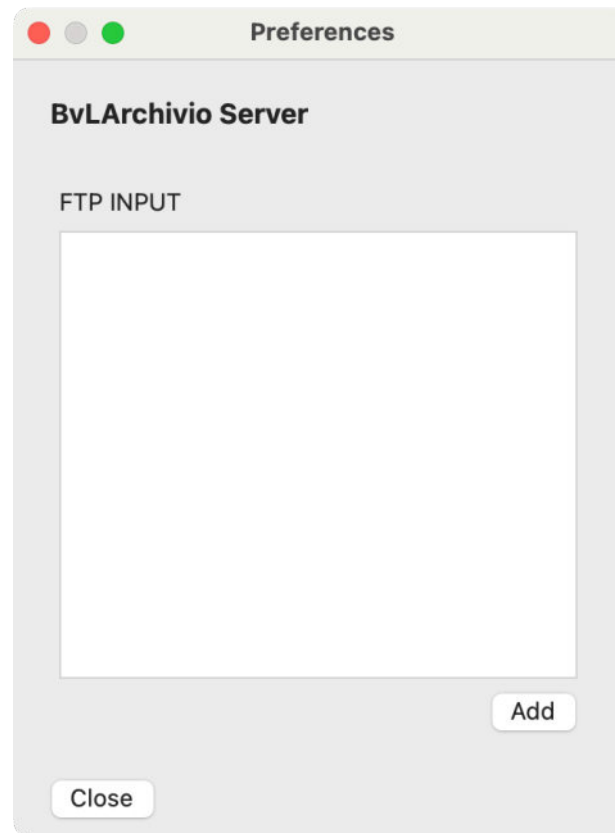
Picture left:

After the start

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

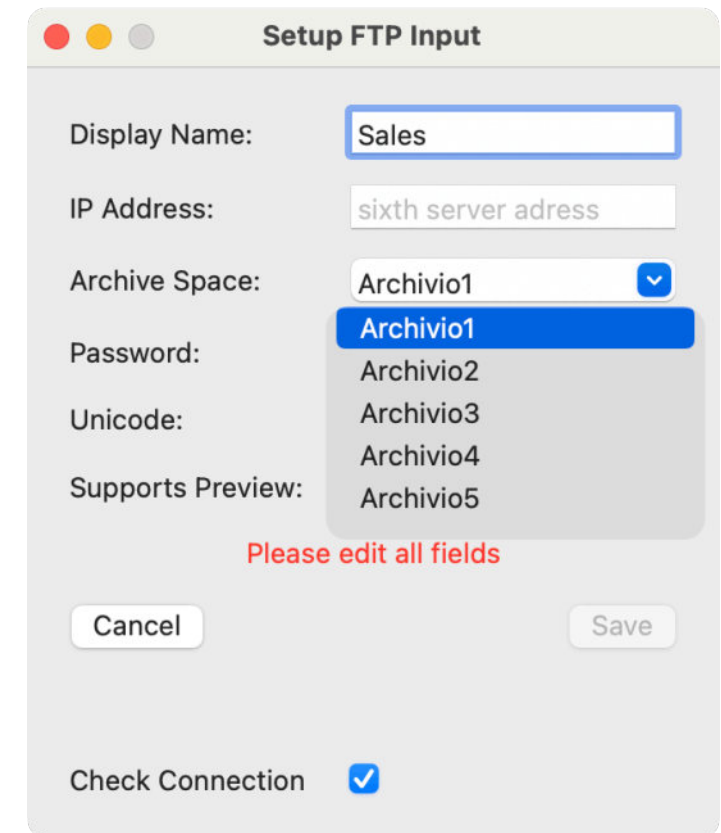
The menu bar is described in [Chapter 4.3 ➡](#).

Click on [\[BvLArchivio Desktop\]](#) in the menu bar and then on [\[Preferences...\]](#).



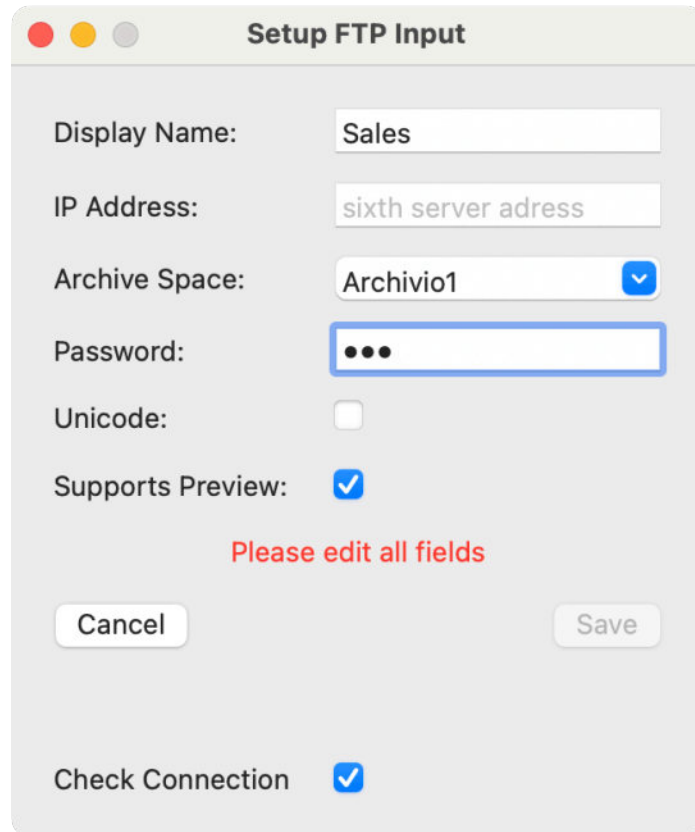
Picture centre and right:

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



Setup FTP Input

Display Name: Sales

IP Address: sixth server adress

Archive Space: Archivio1

Password: ●●●

Unicode: ☐

Supports Preview: ☒

Please edit all fields

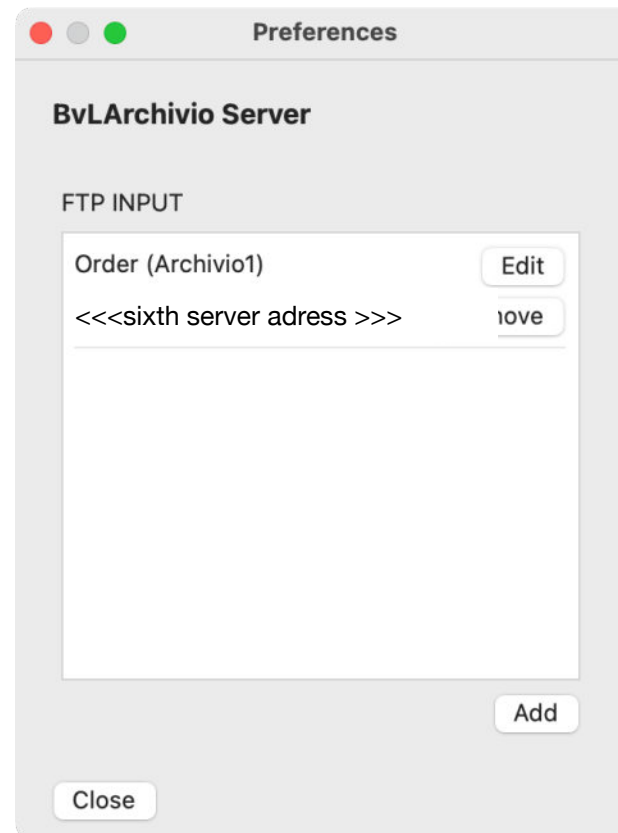
Cancel Save

Check Connection ☒

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.



Preferences

BvLArchivio Server

FTP INPUT

Order (Archivio1)	Edit
<<<sixth server adress >>>	Remove

Add

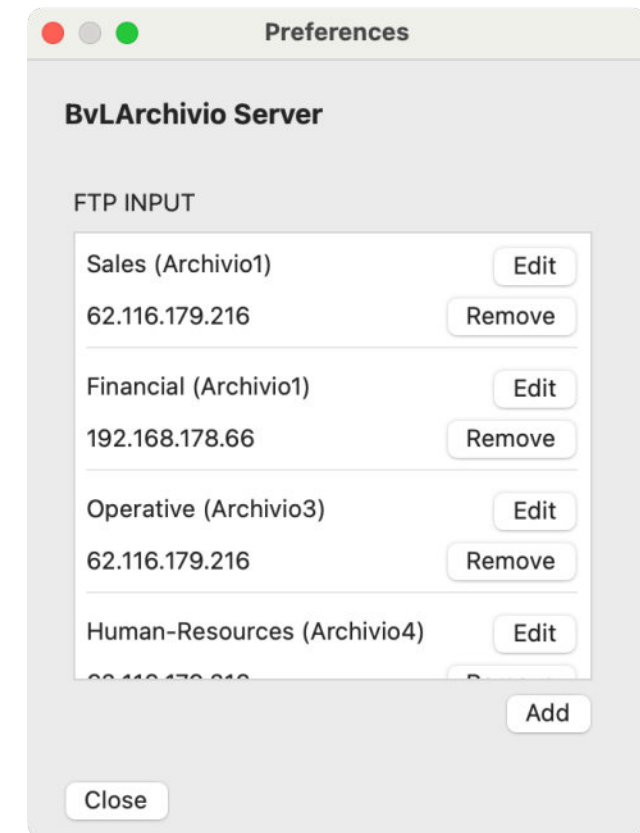
Close

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.



Preferences

BvLArchivio Server

FTP INPUT

Sales (Archivio1)	Edit
62.116.179.216	Remove
Financial (Archivio1)	Edit
192.168.178.66	Remove
Operative (Archivio3)	Edit
62.116.179.216	Remove
Human-Resources (Archivio4)	Edit
62.116.179.216	Remove

Add

Close

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.

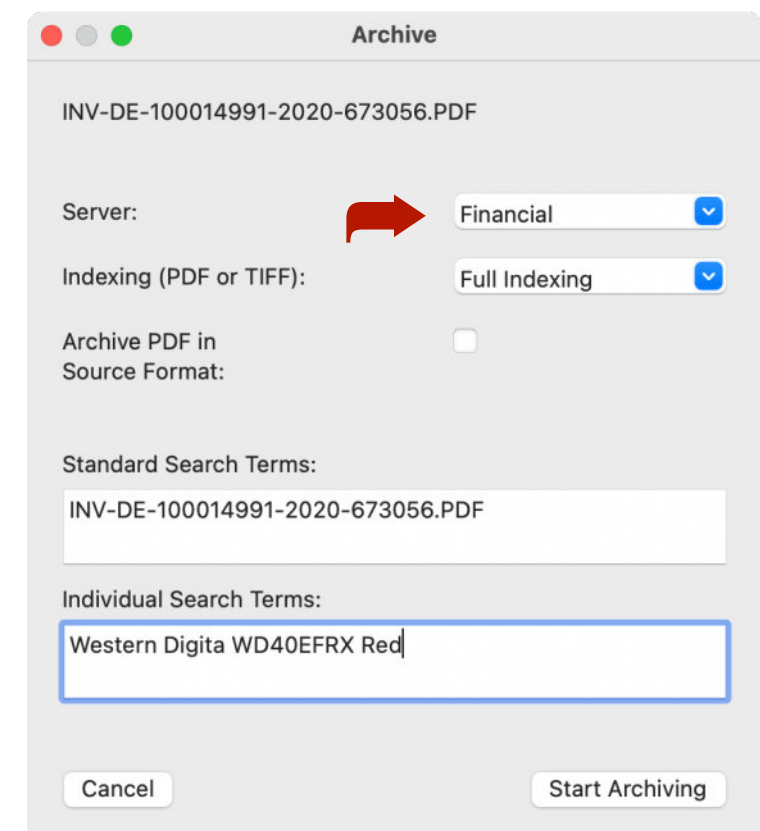
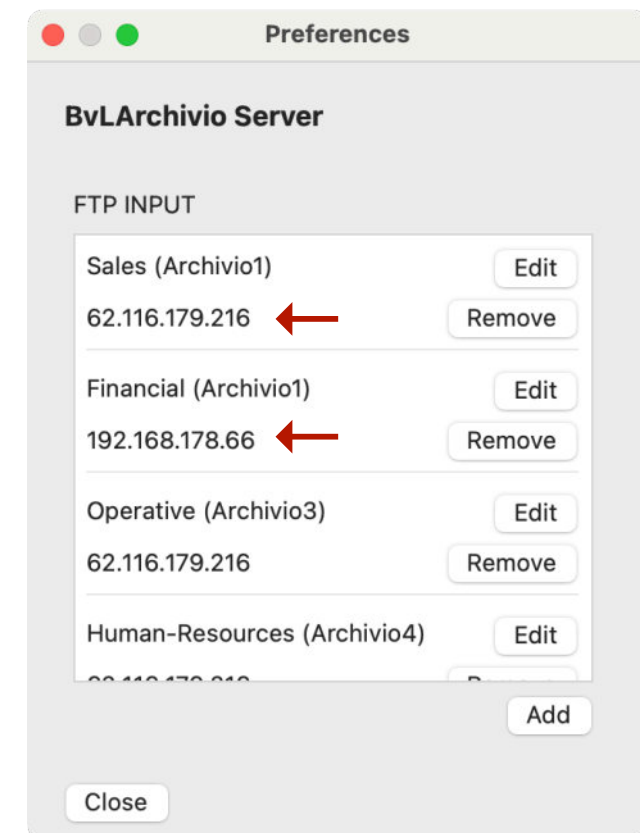
It is possible to create different departments.

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.

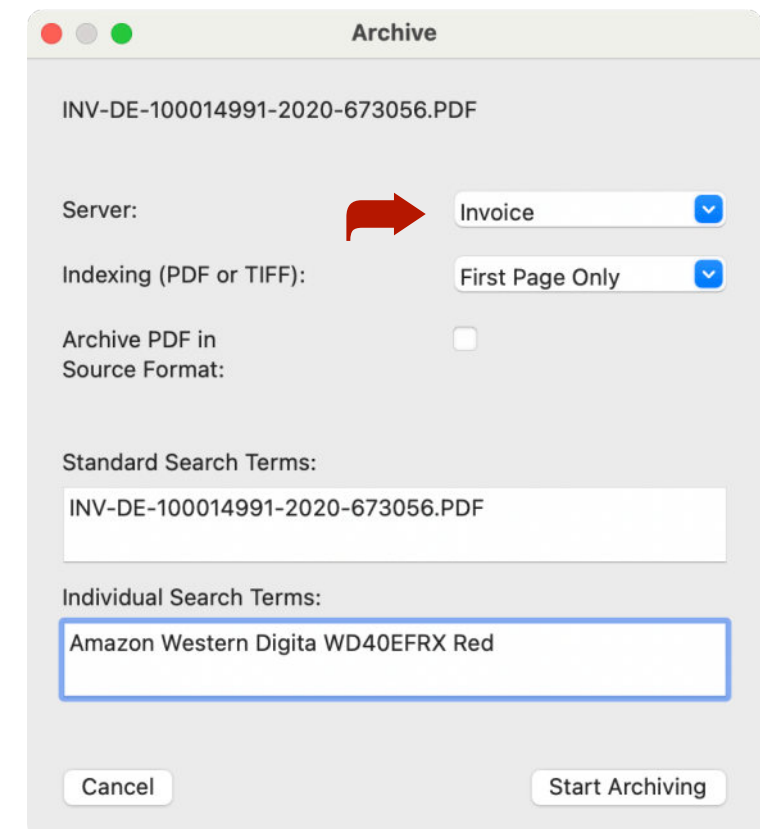
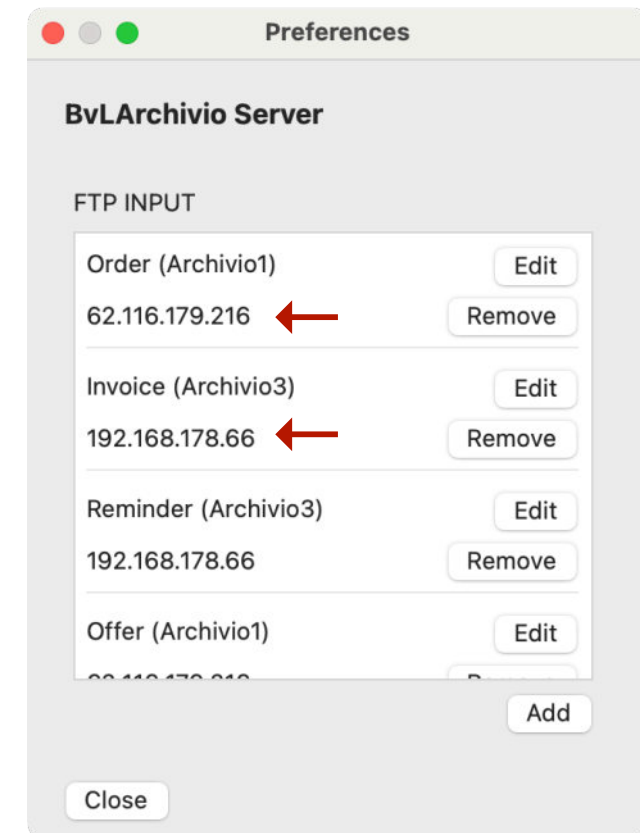
It is possible to create a large number of document classes.

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.

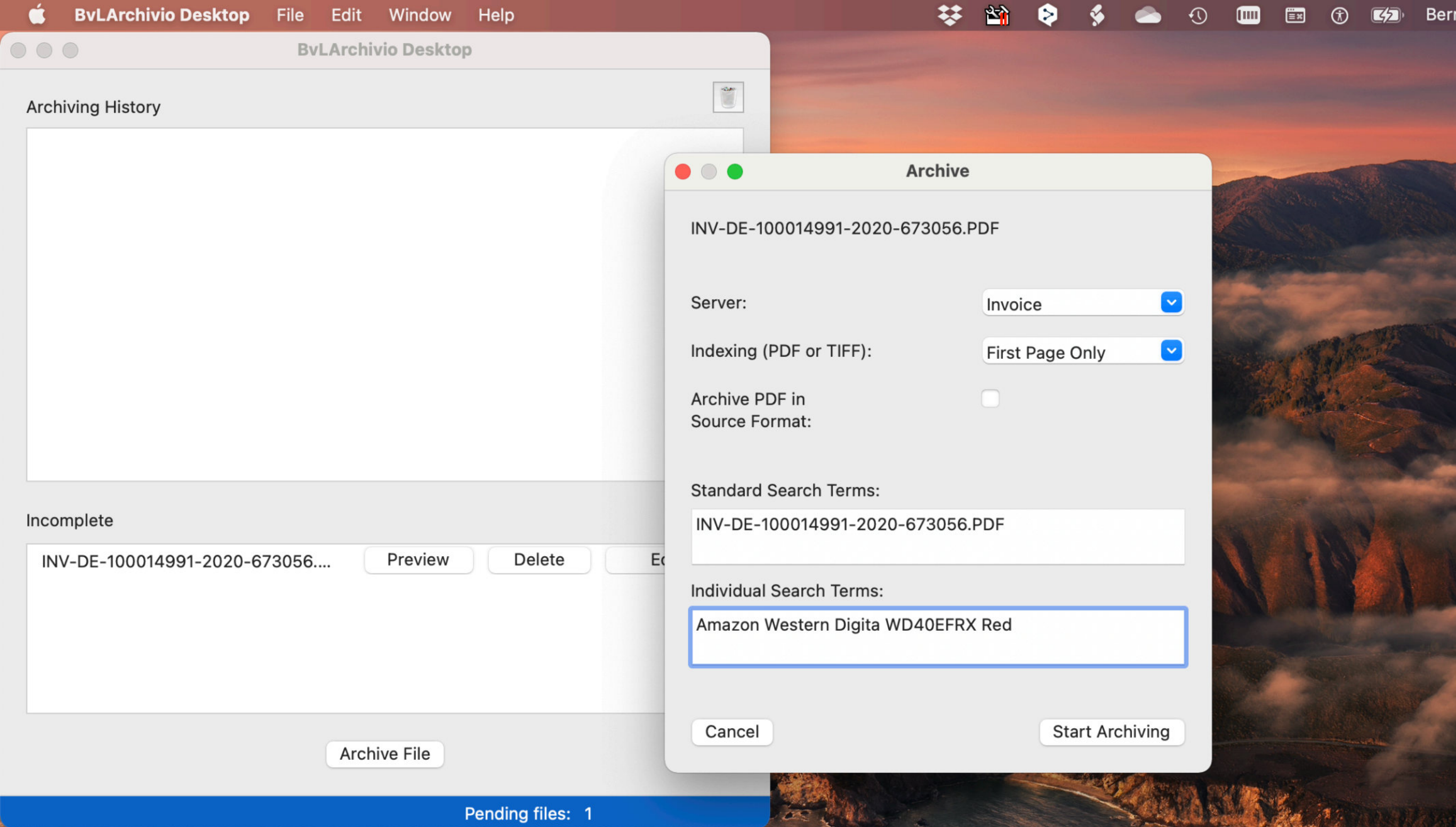
The example shows ← that the documents for invoices and orders are archived on different servers.

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



Chapter 4

BvLArchivio Desktop App



4.1 Archiving files with the BvLArchivio Desktop App

Archiving files with the BvLArchivio Desktop App

4.1.1 Via the menu bar

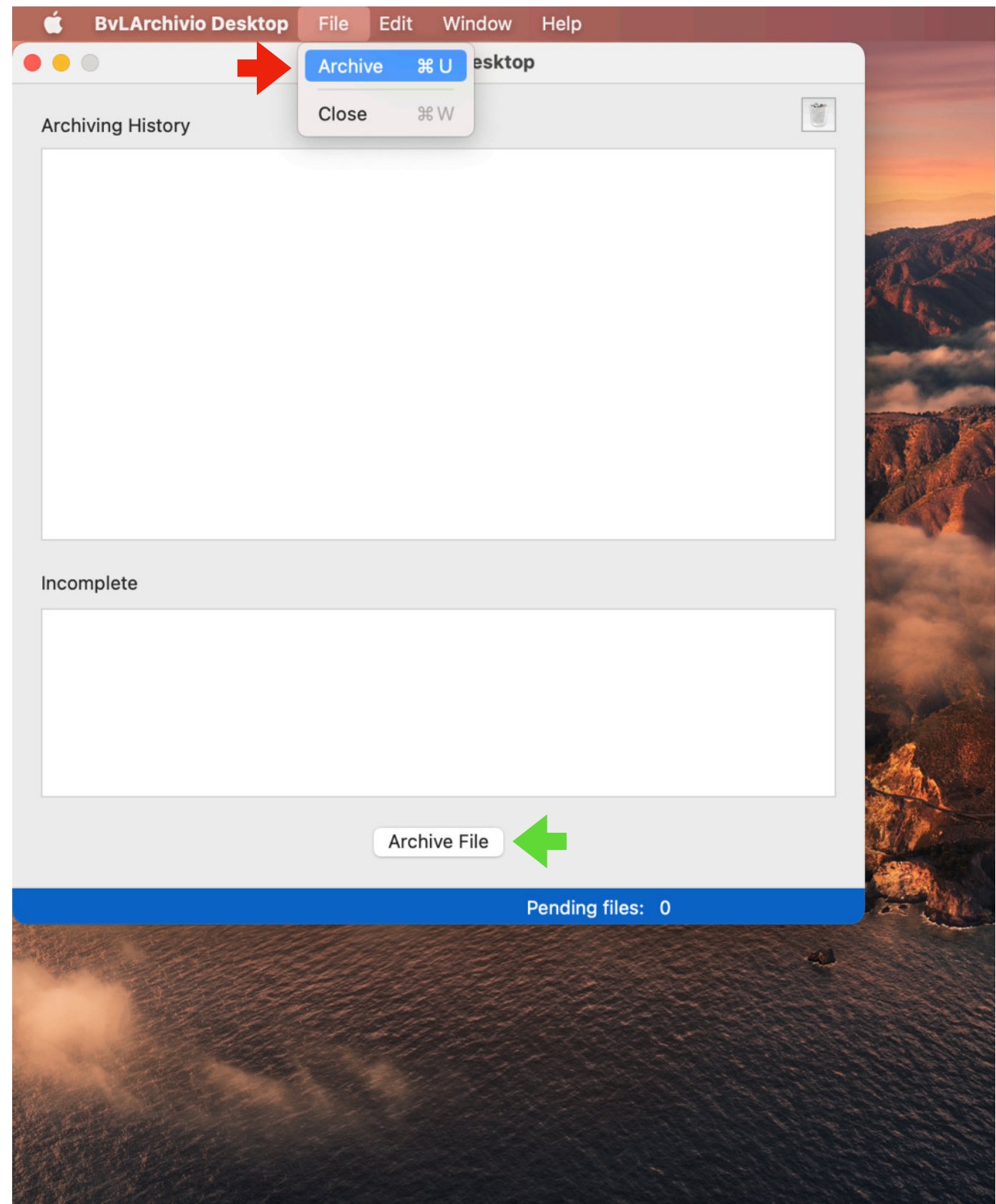
The Archive function is made available via the menu bar.

Start BvLArchivio Desktop and click on [\[File\]](#) and [\[Archive\]](#).

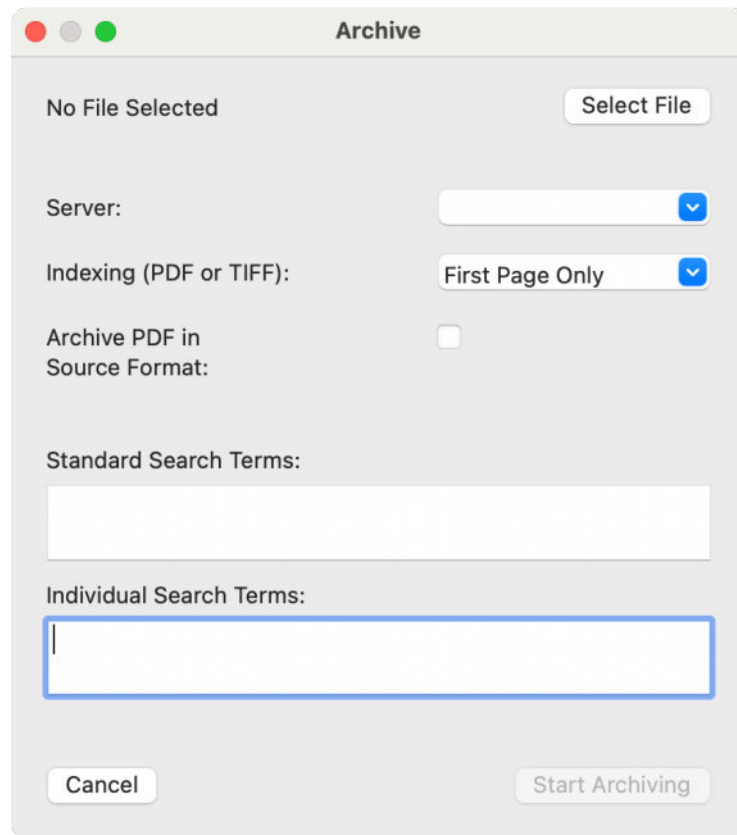
The flexible BvLArchivio Desktop App provides several functions for audit-proof archiving.

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:

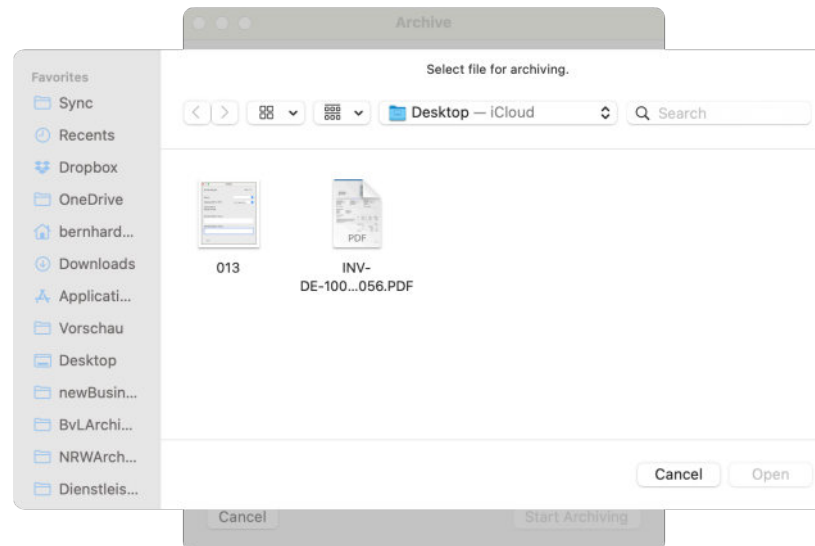
After selecting [\[Archive\]](#), the archiving window appears

[\[Select File\]](#) opens the Finder and allows you to select a file.

Picture centre:

Click on a file to select.

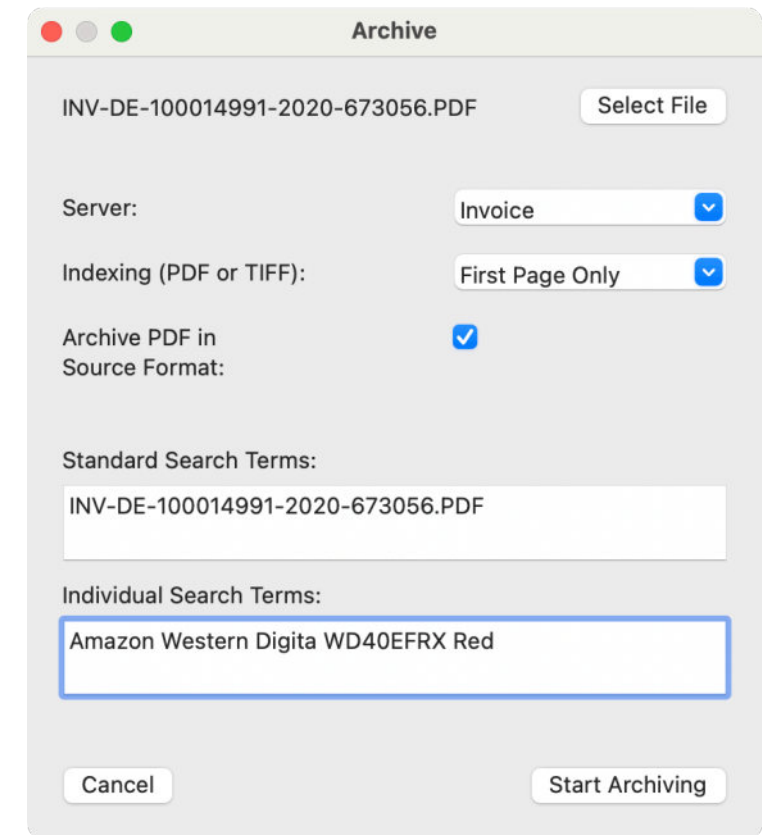
Click on [\[Open\]](#) to use this file for archiving.



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

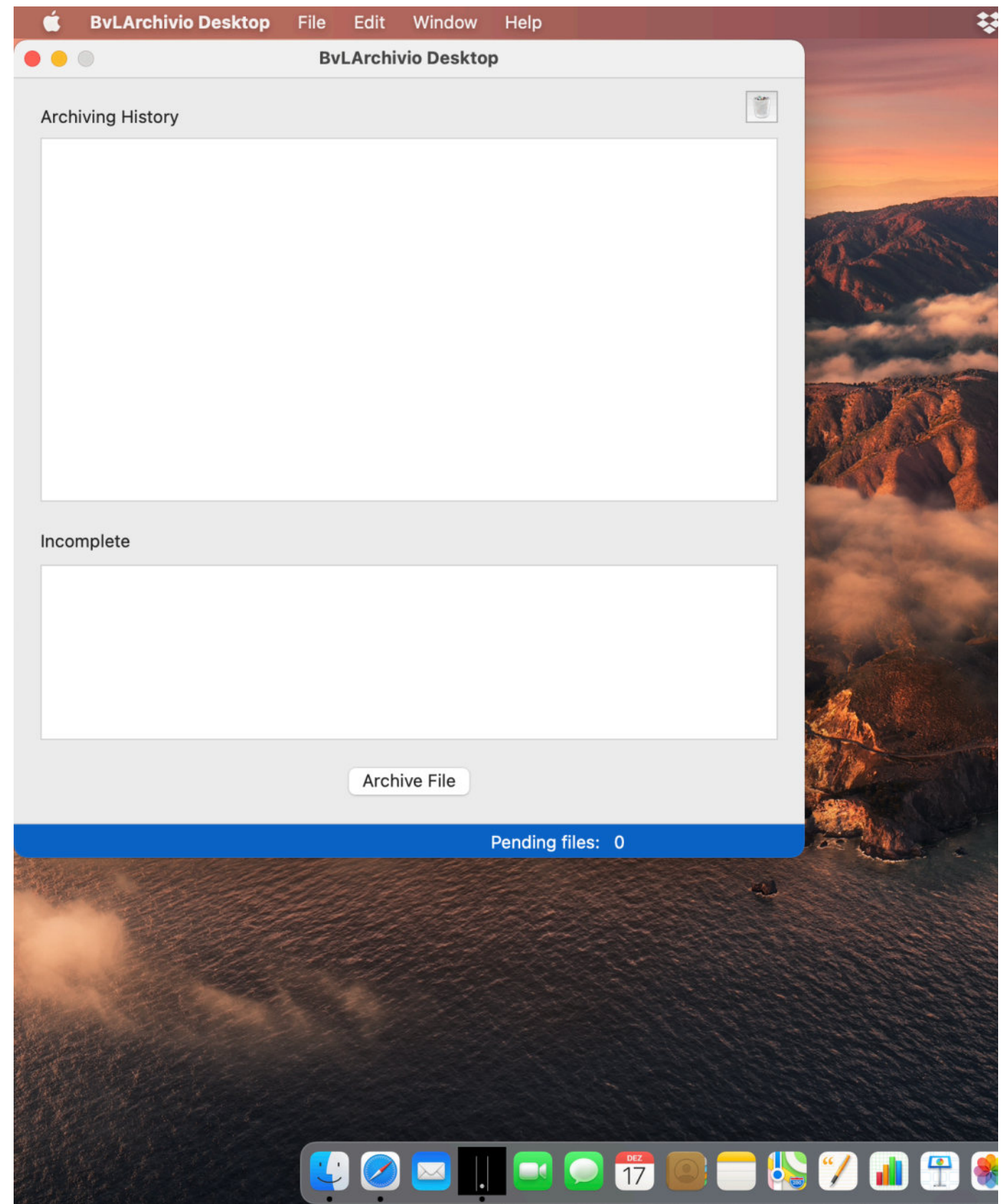
2. Release the mouse button to hand the file to BvLArchivio Desktop. **Drop**

Flexibility

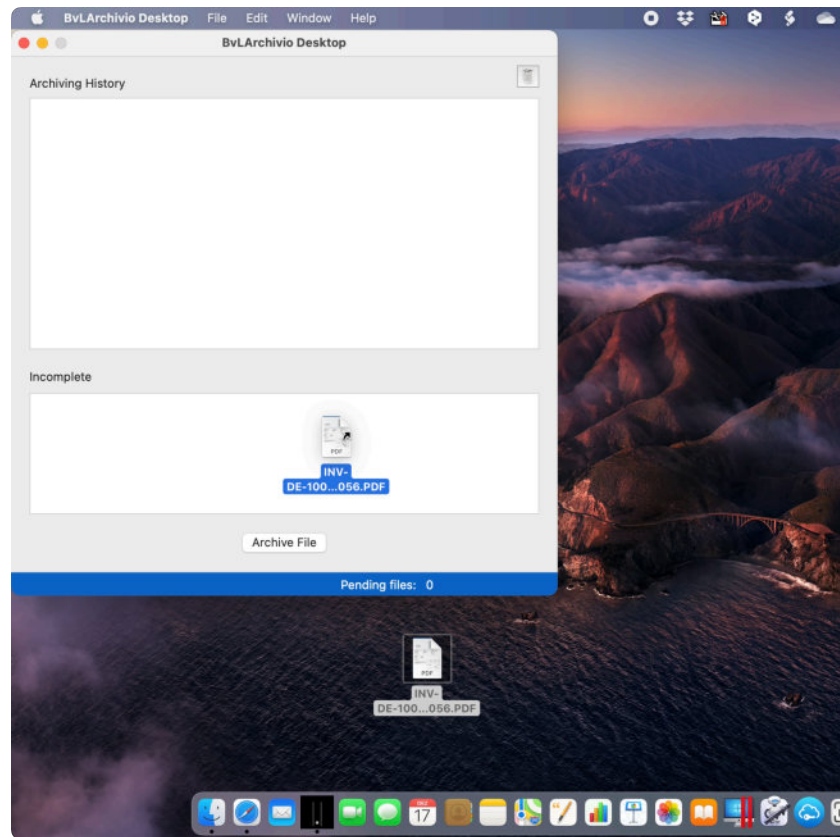
BvLArchivio Desktop App is flexible and provides several functions for audit-proof archiving.

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 ➡](#).

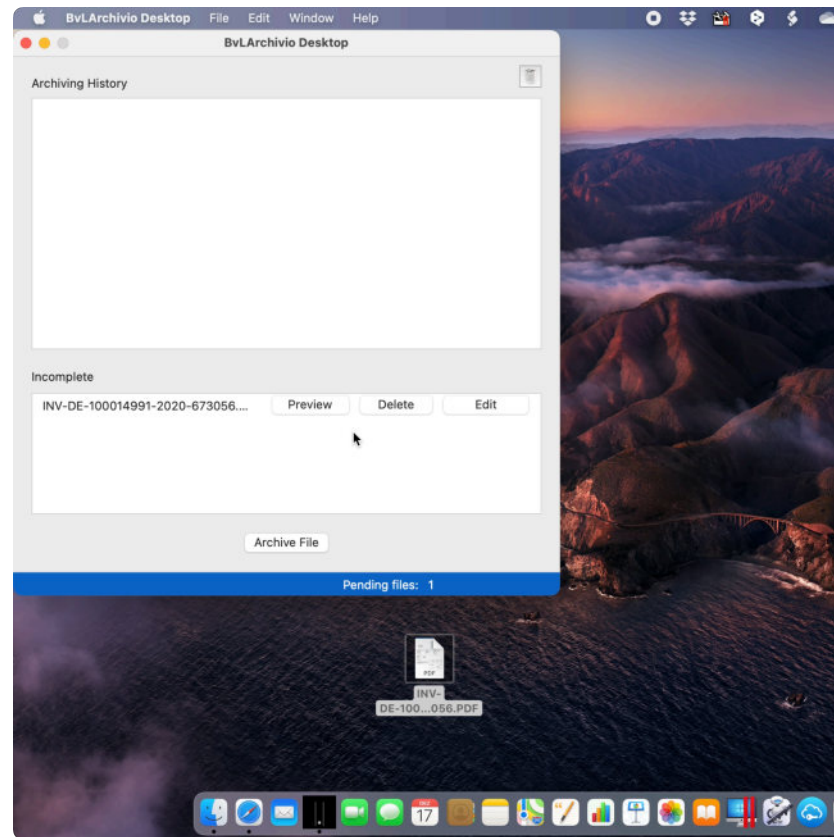


Archiving files with BvLArchivio Desktop App



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**

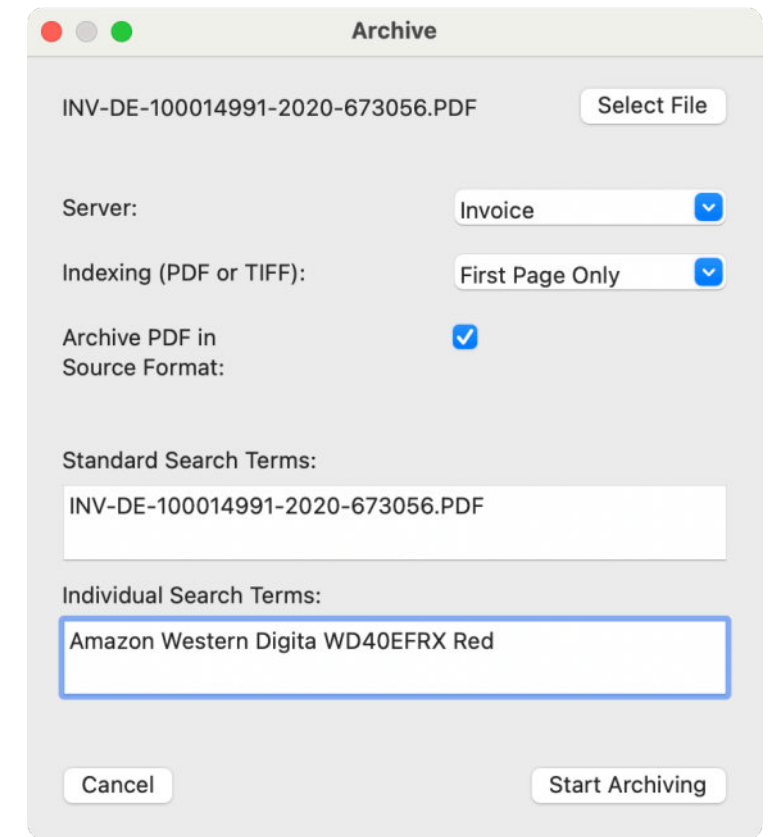


Picture centre:

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.

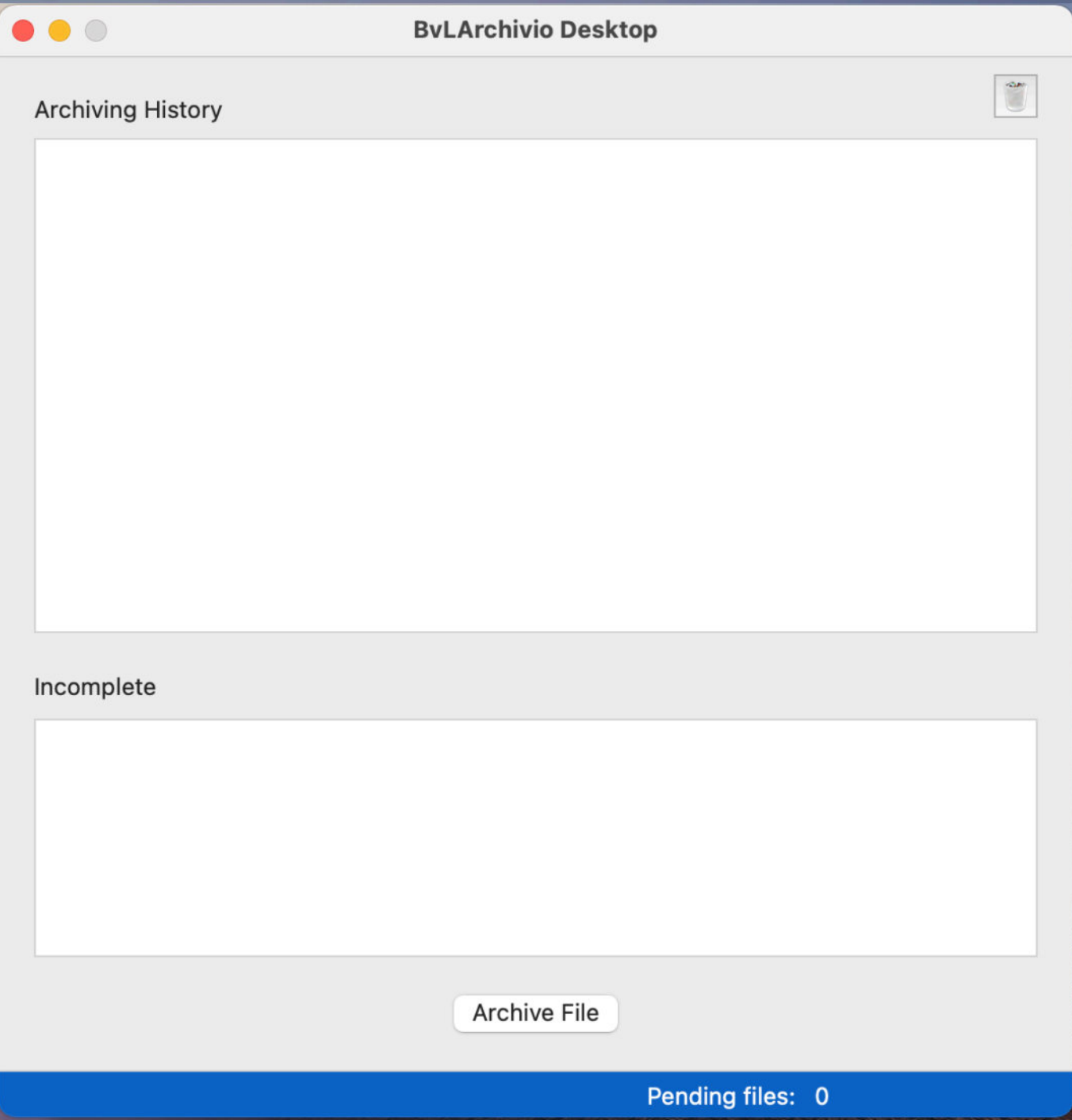
[\[Preview\]](#) and [\[Delete\]](#) are described in [Chapter 4.2.3 ➡](#).



Picture right:

The input options are described in [Chapter 4.1.1 ➡](#).

The overview of the processing is described in [Chapter 4.2.1 ➡](#).



4.2 The program window

The user interface

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'clock 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

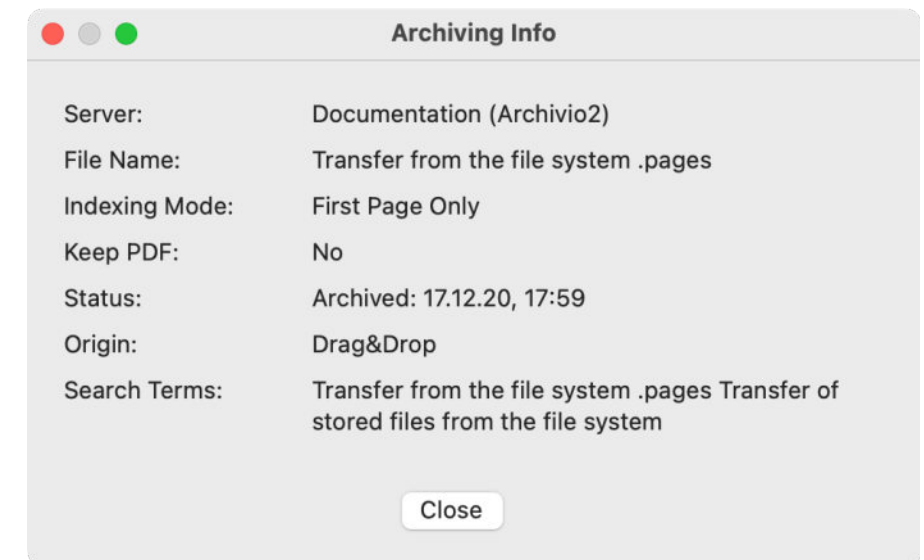
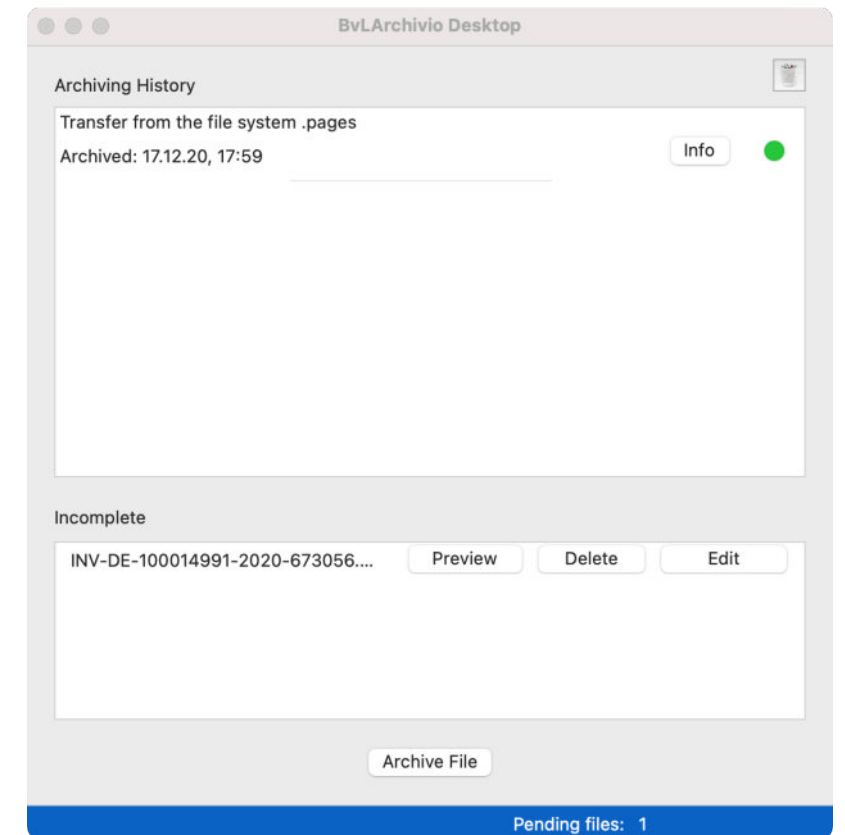
The Incomplete area shows files that are still waiting for further input to complete the audit-proof archiving.

[\[Delete\]](#) (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

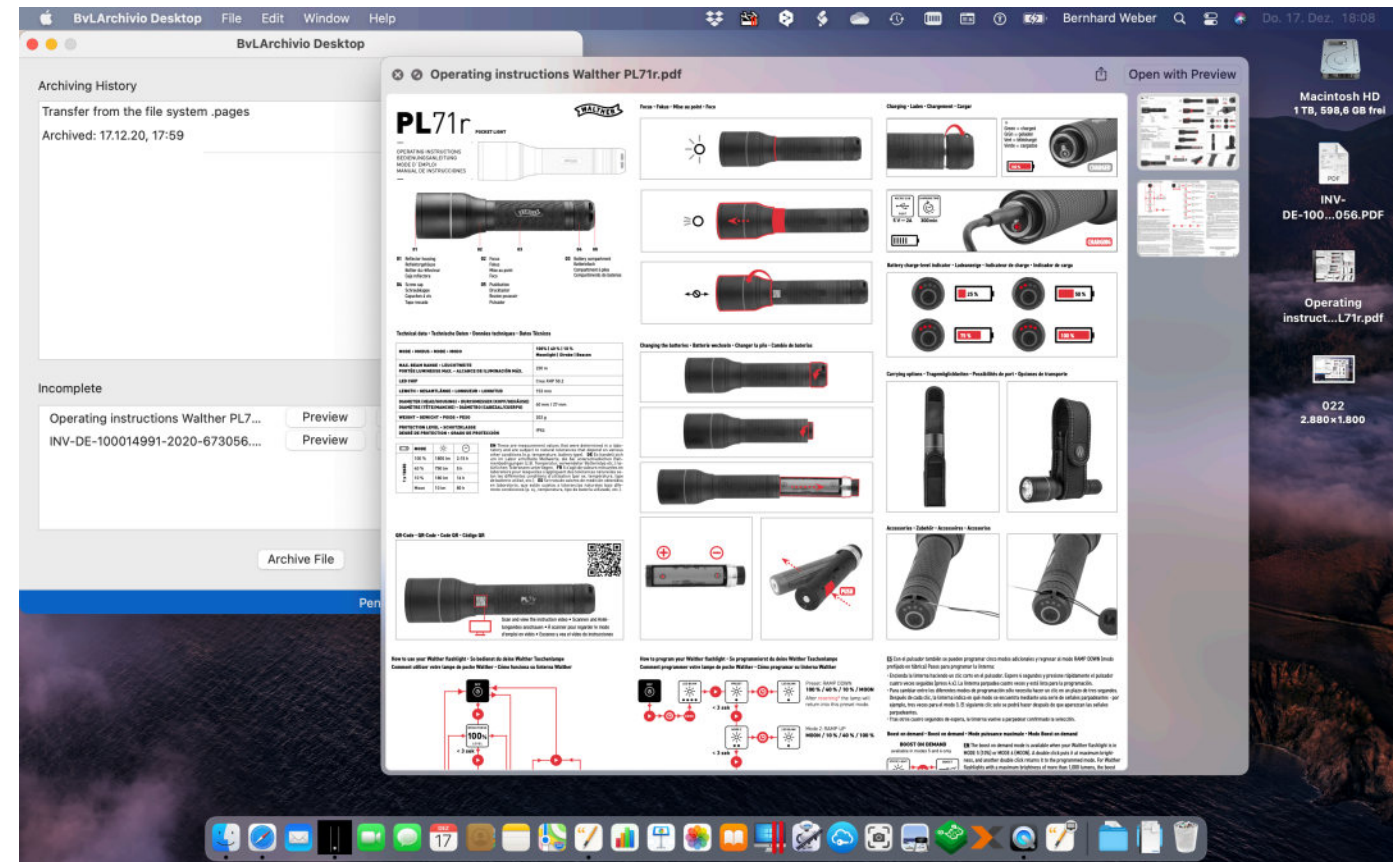
4.2.3 Preview and delete

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 respective 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.



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

The menu bar, BvLArchivio Desktop and File

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 ➡](#).

About BvLArchivio Desktop

Preferences... ⌘ ,

Export Preferences

Import Preferences

Hide BvLArchivio Desktop ⌘ H

Hide Others ⇧ ⌘ H

Show All

Quit BvLArchivio Desktop ⌘ Q

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.

Archive ⌘ U

Close ⌘ W

Chapter 5

Automation

5.1 Automation

🍏 Automator & Script

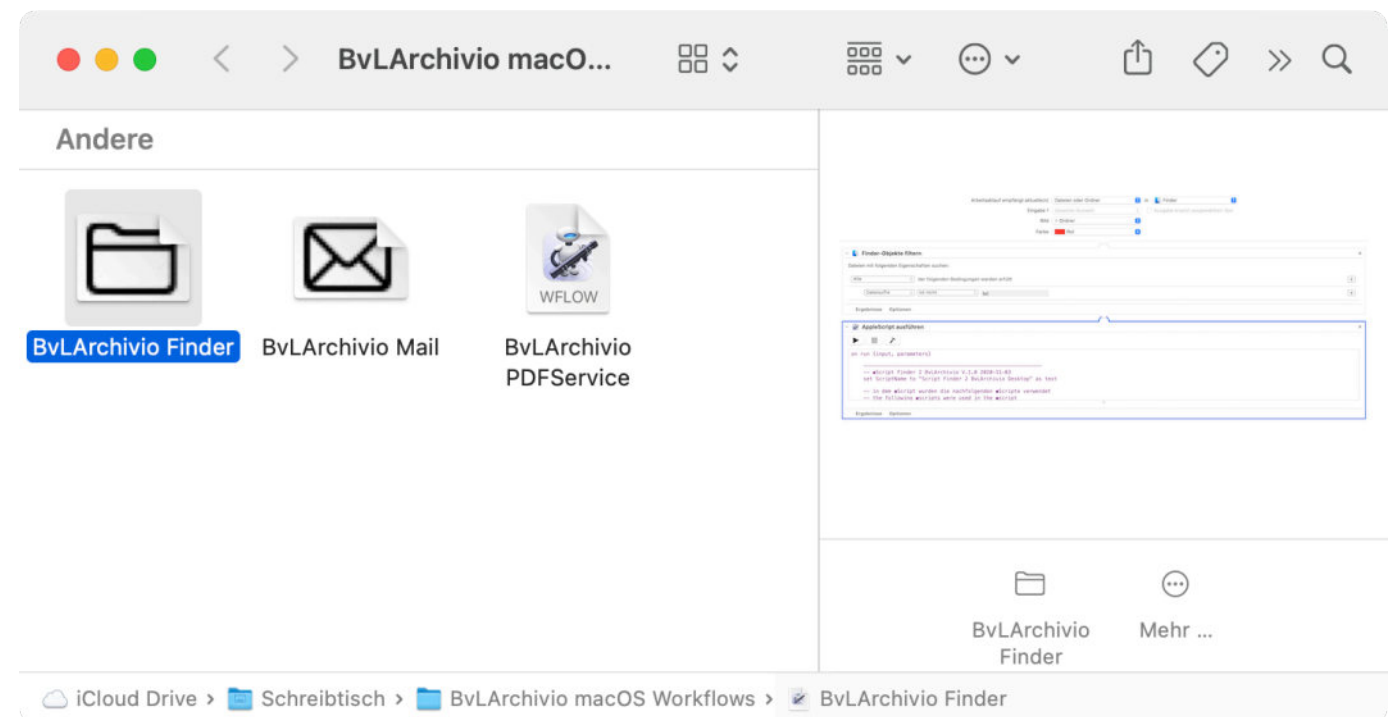
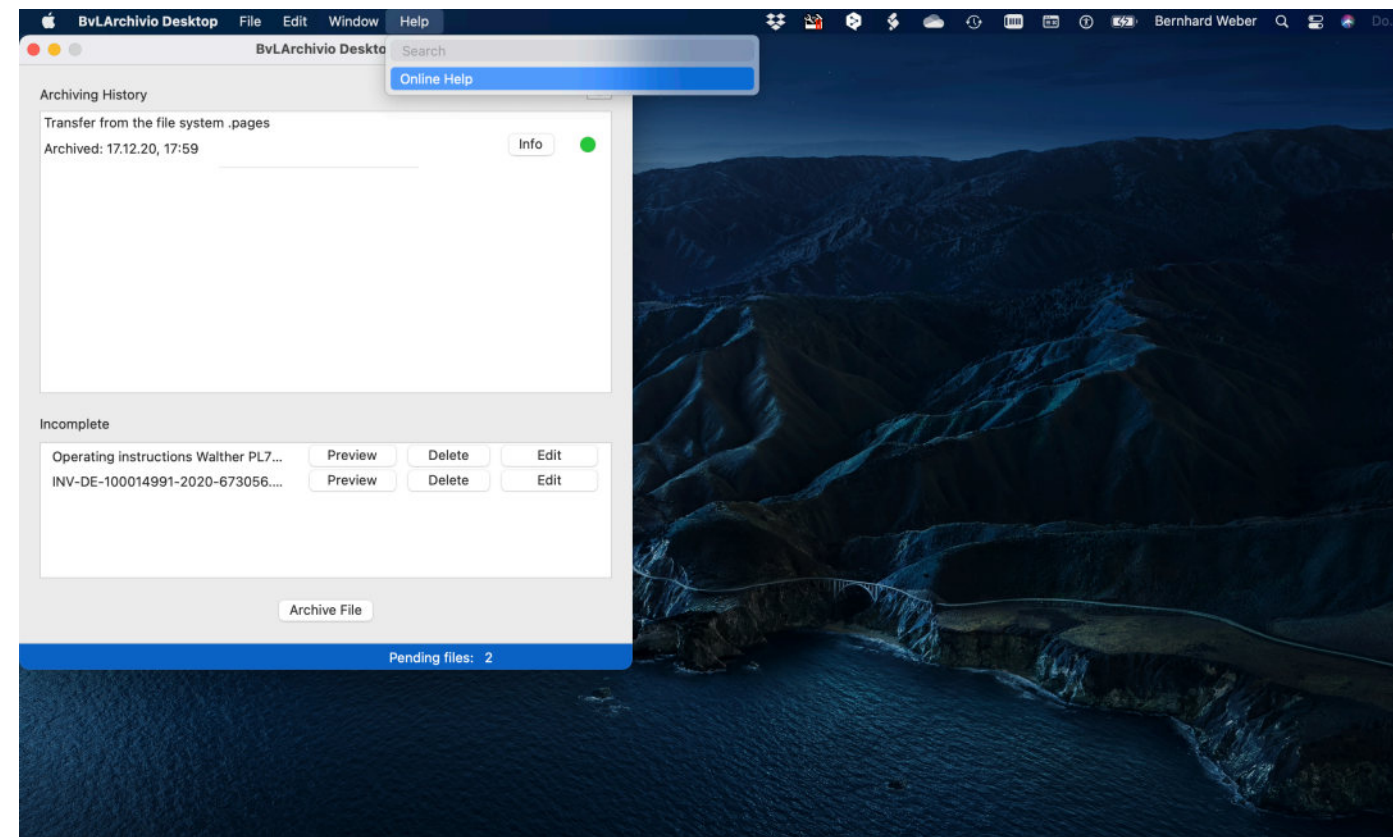
It is possible to connect the macOS applications Finder, Mail and Print Output with BvLArchivio Desktop. Download the BvLArchivio macOS Workflows.zip from the [download area](#) ➡.

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).

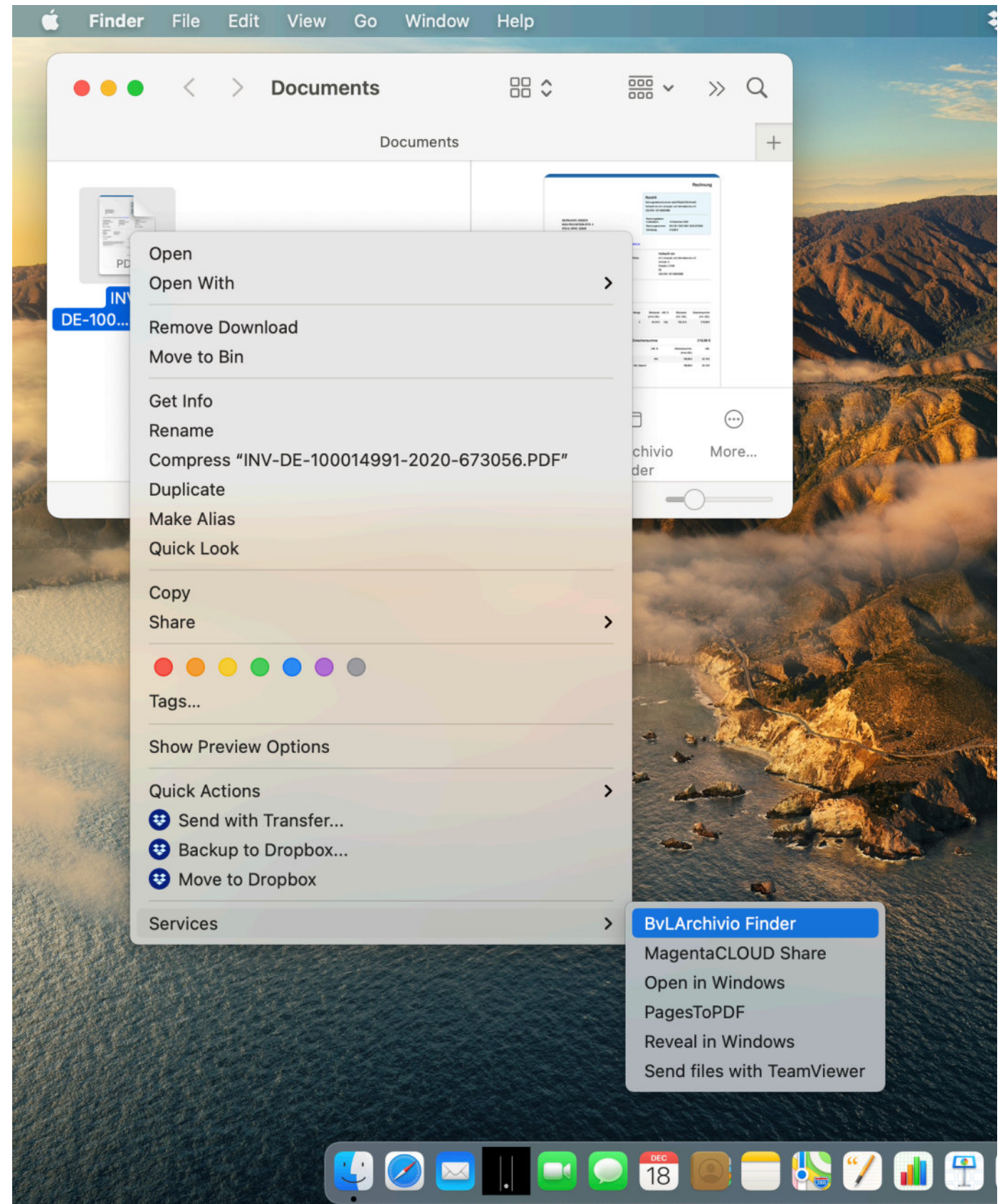
Workflow with the Finder

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.

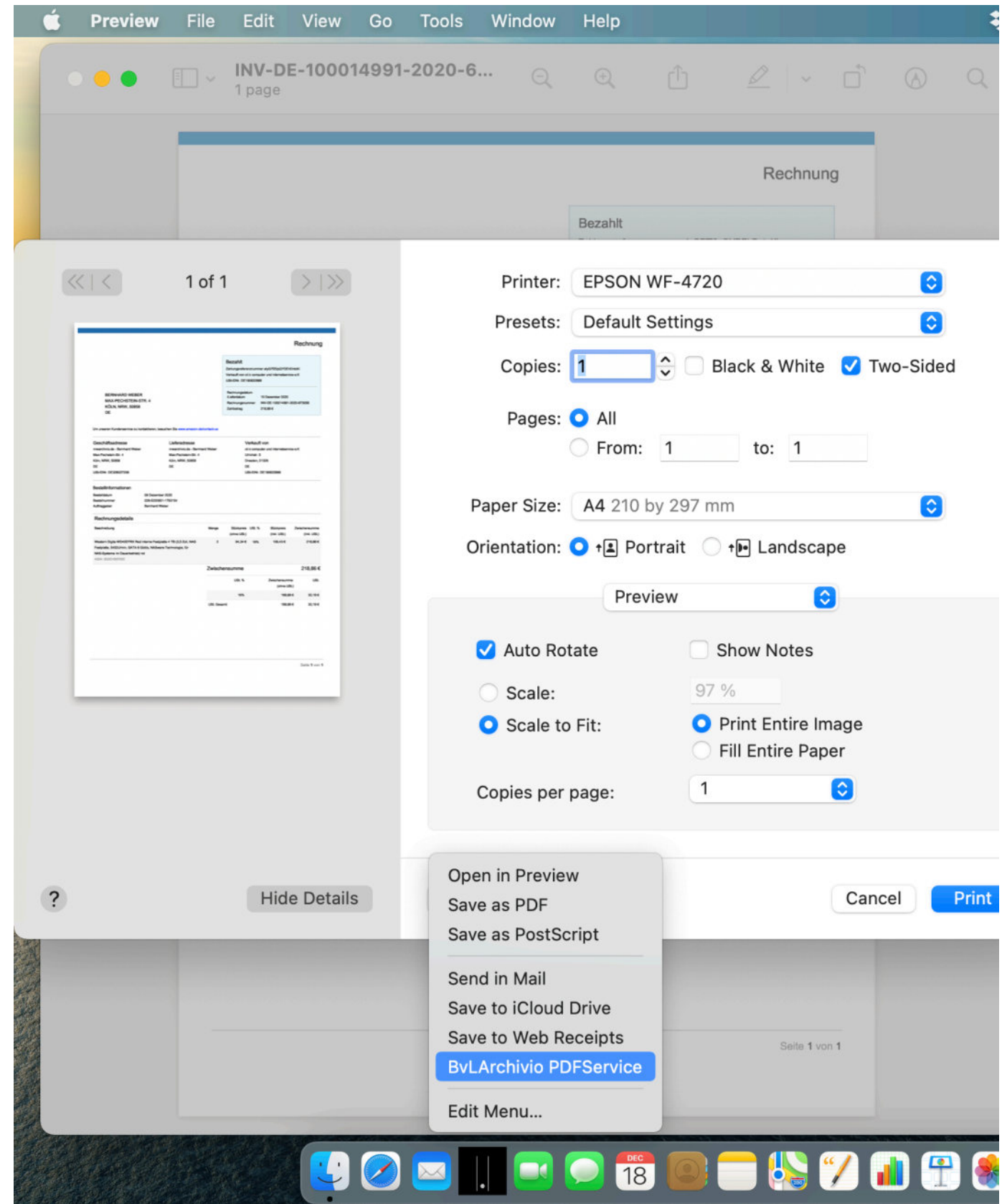
The plug-in works with the library of the BvLArchivio app and is stored in user > library (~/.Library/PDF Services)

Workflow in the print dialog

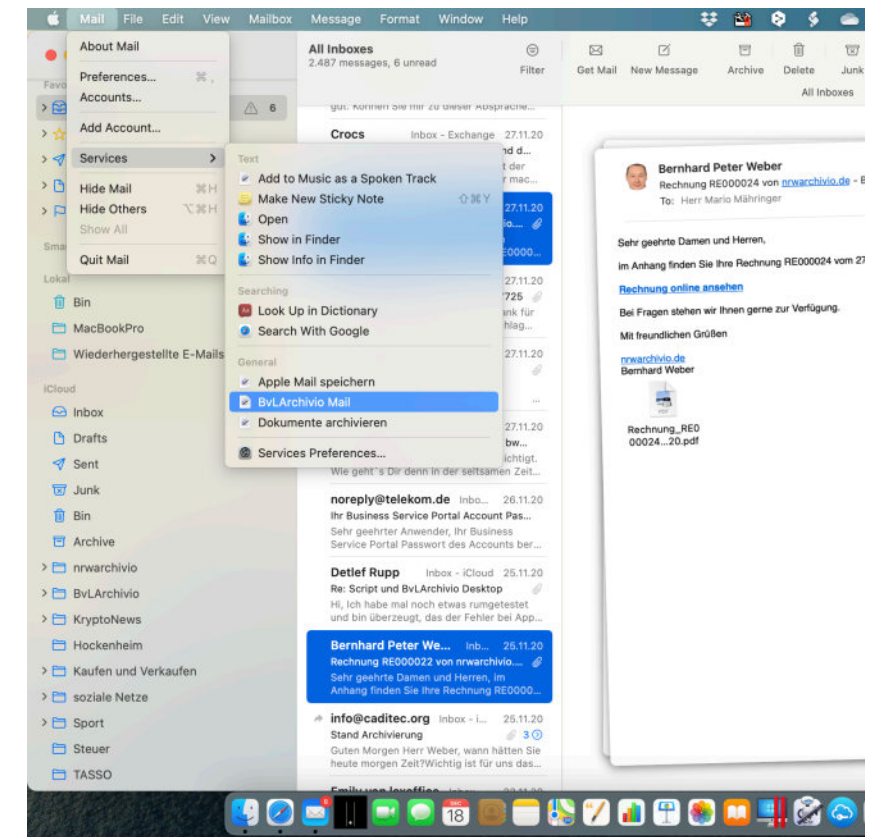
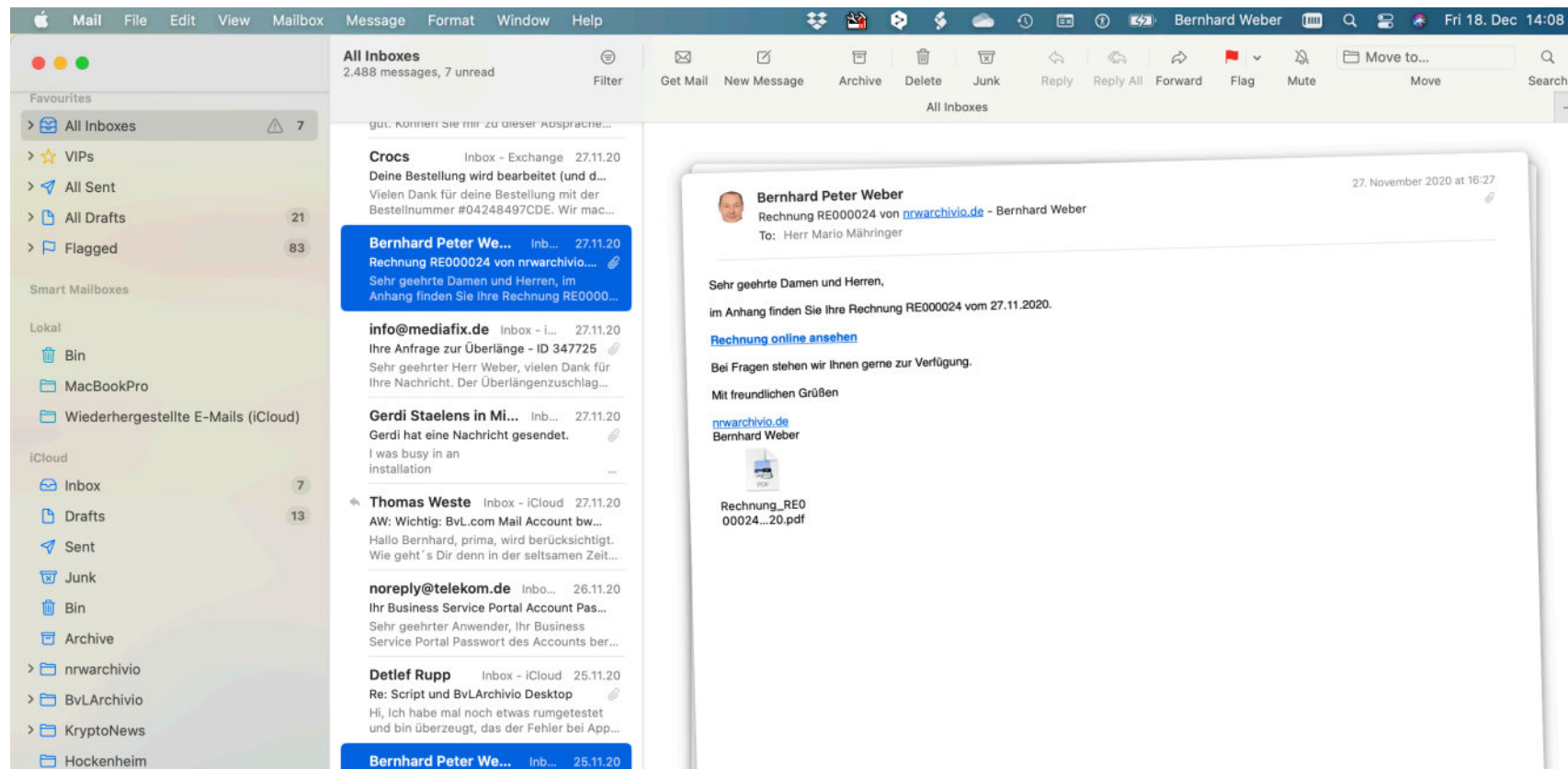
The print dialogue is selected in the menu bar with [\[File\]](#) and [\[Print\]](#).

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 BvLArchivio Mail has some special features.

The email is always archived with all attachments.

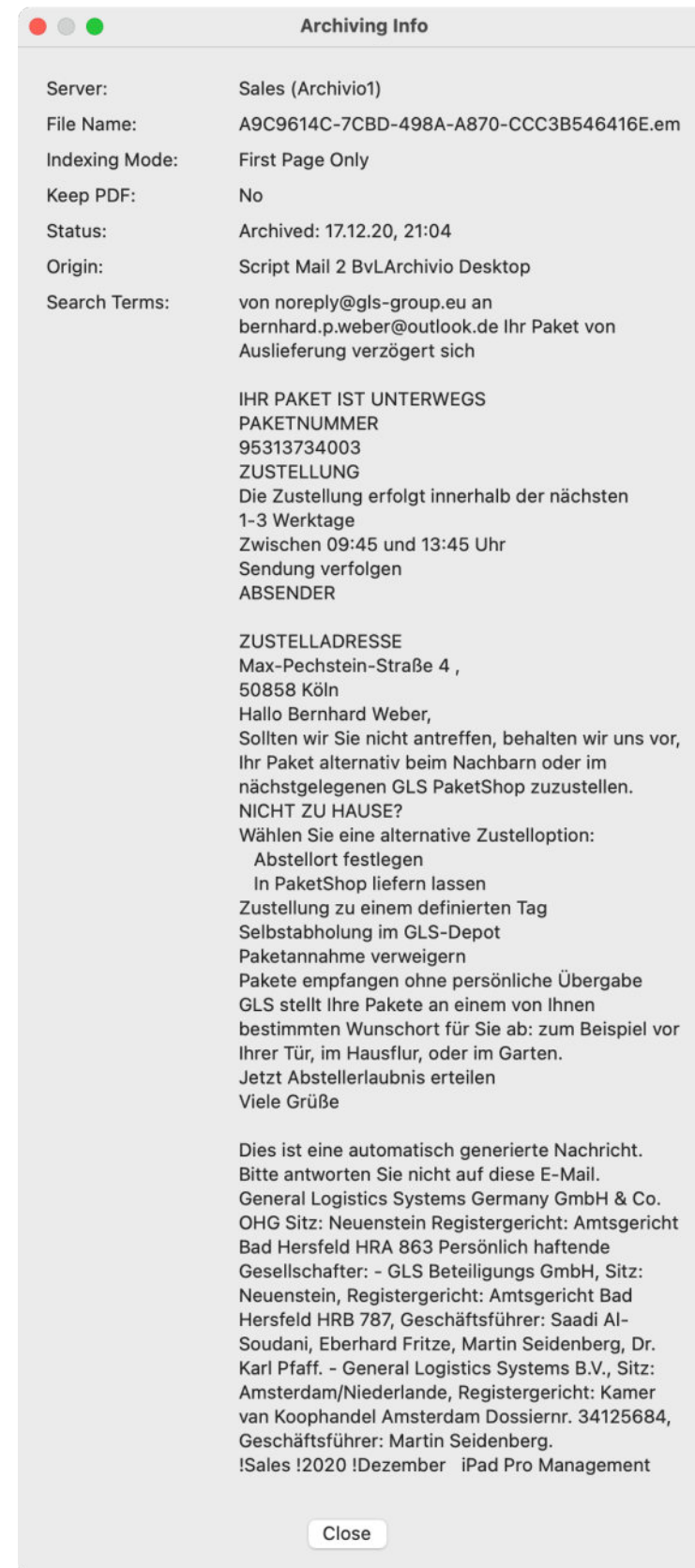
The script ensures that you can search for the complete content of the e-mail.

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.

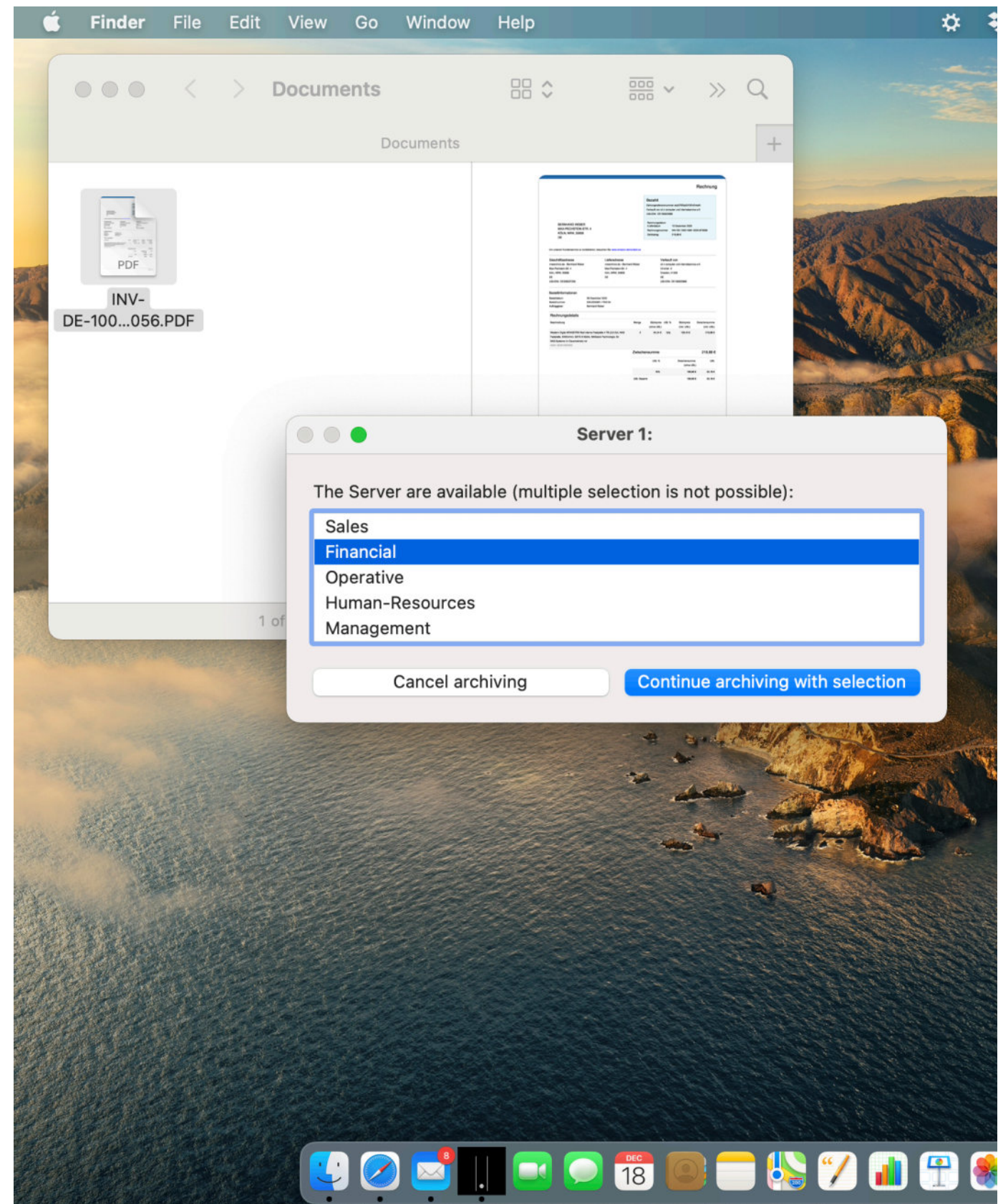
The translation and the automatic search terms can be switched on and off in the script or set to a fixed language.

Additional search terms

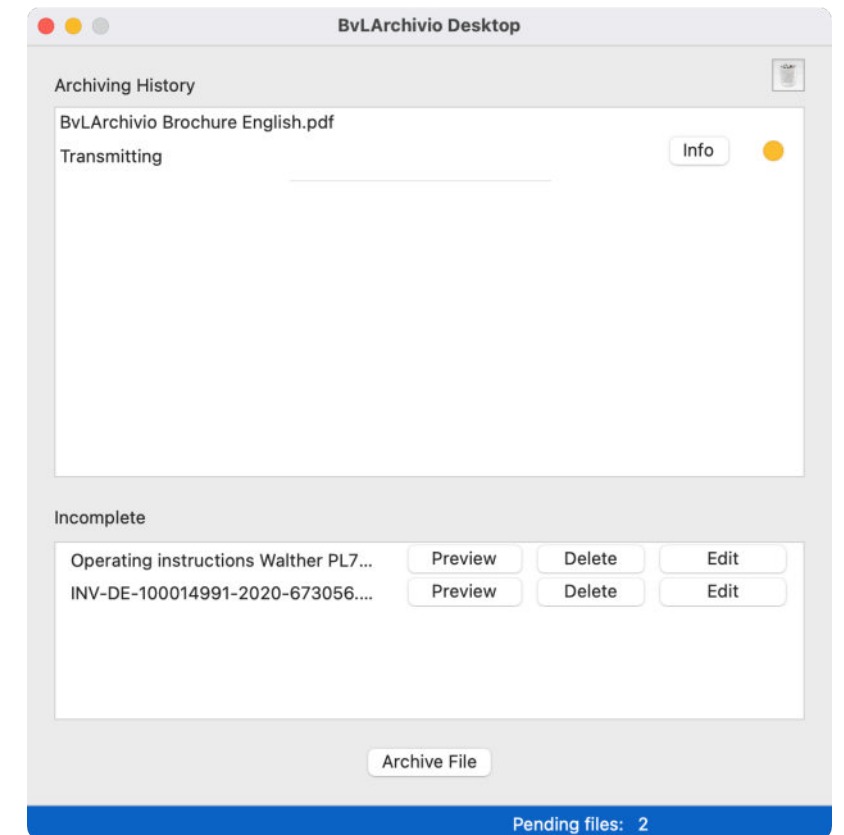
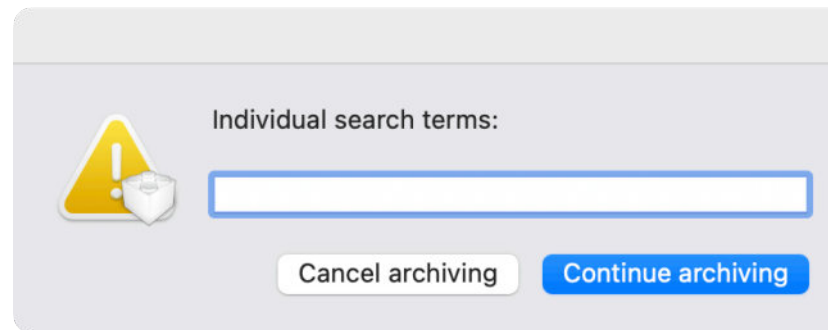
The individual search terms are added by entries in the dialogue.

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 and 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 ➡.

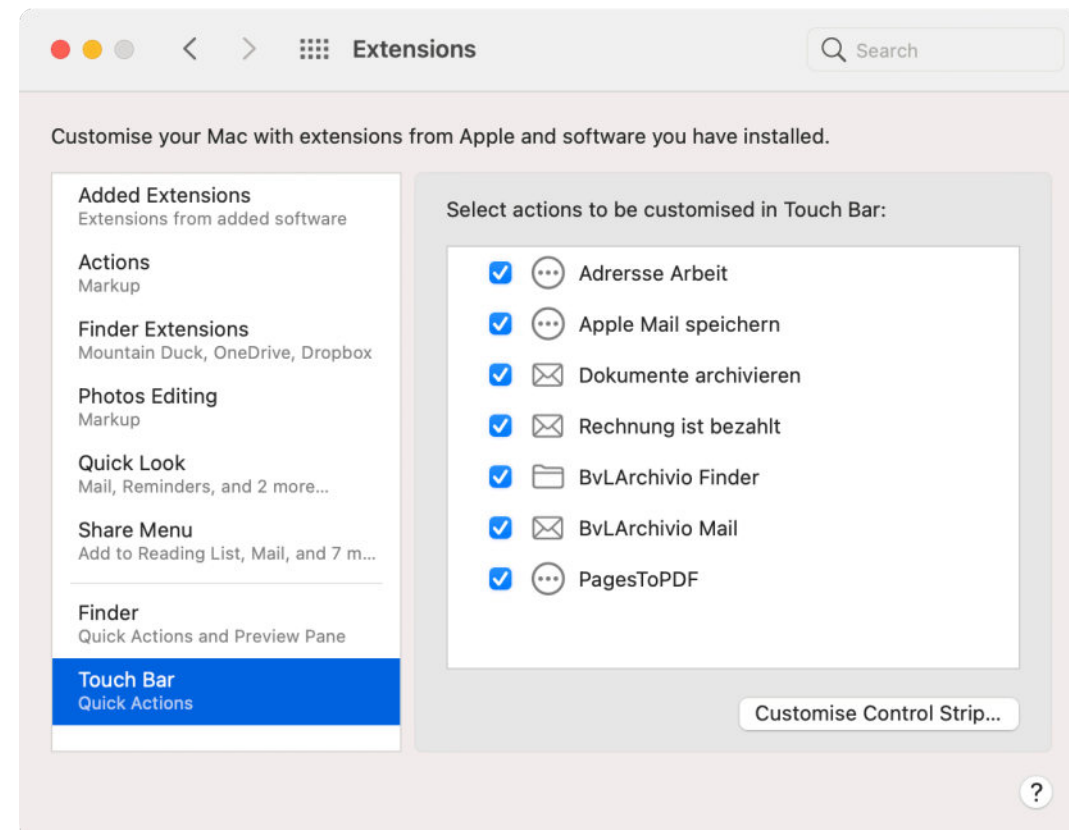
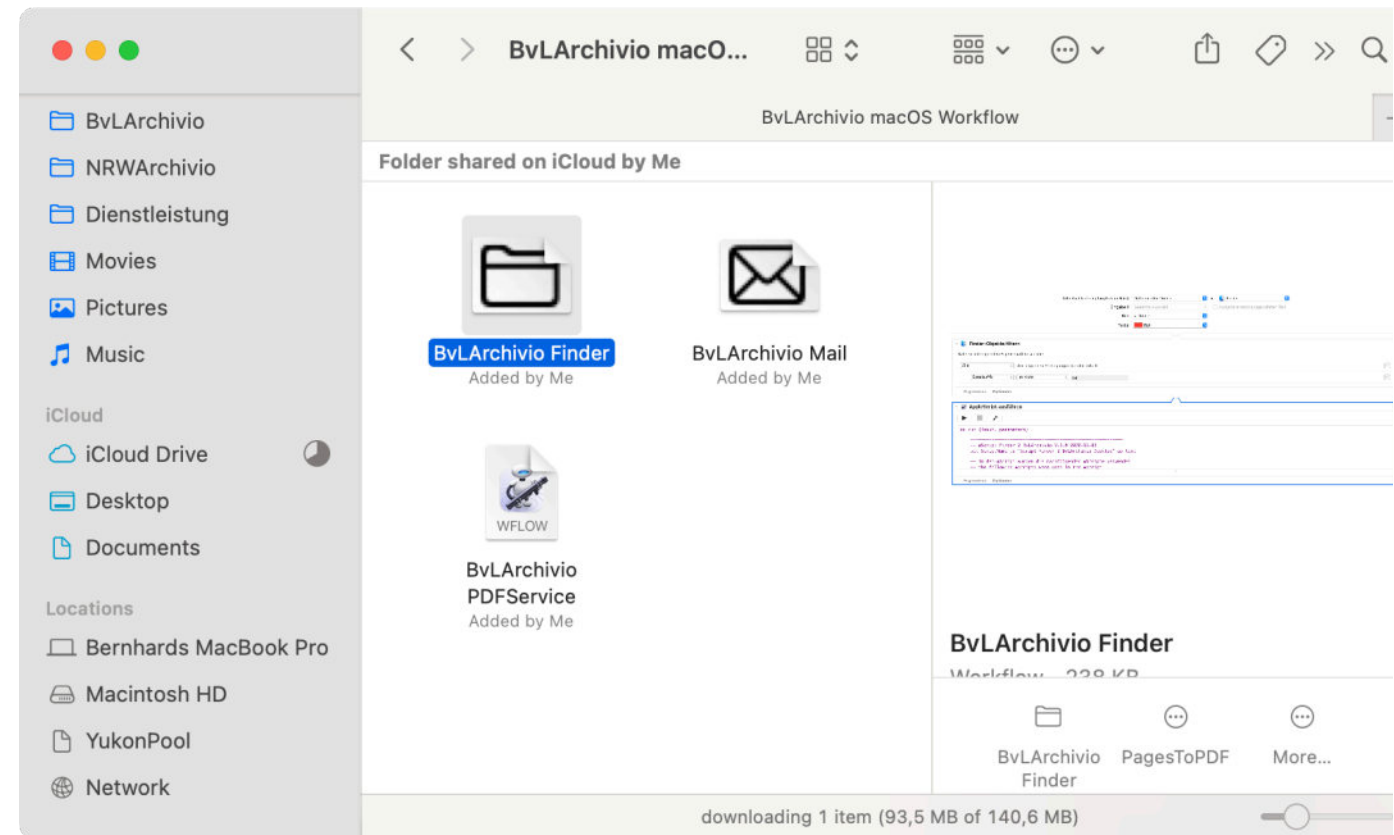
Double-click the respective [icon] to install the automated process.

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

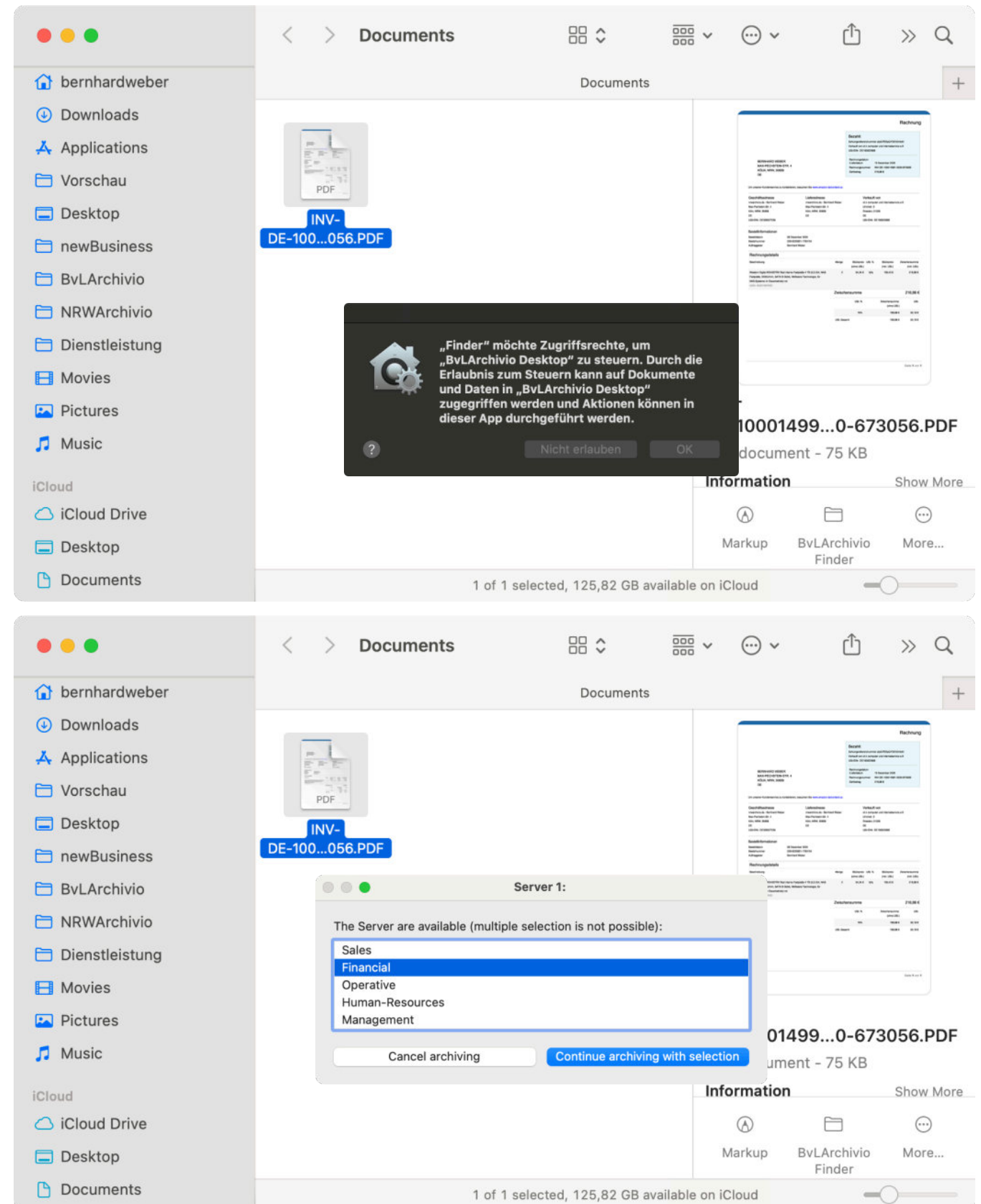
Access rights

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.

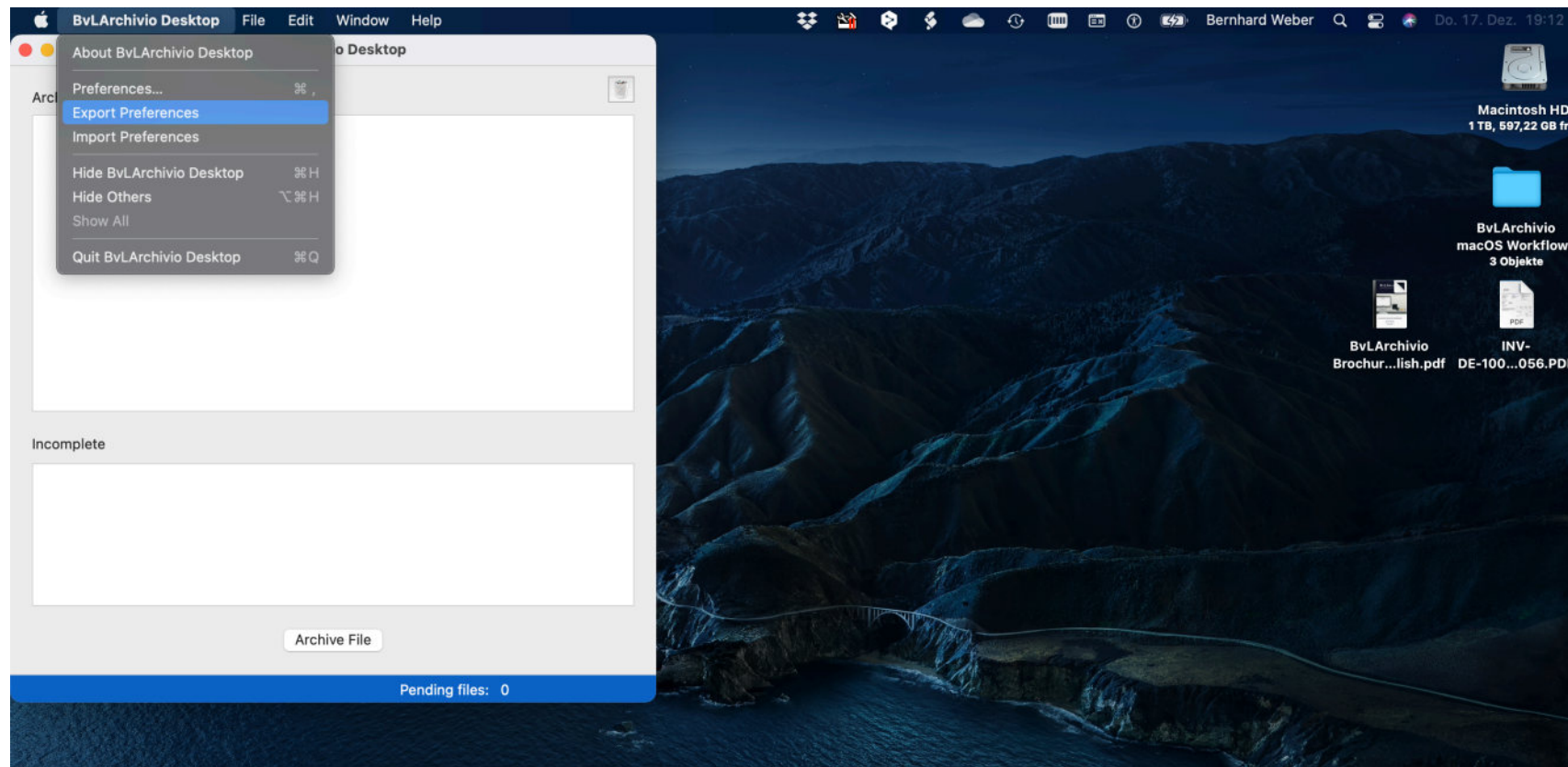
After granting access rights, the dialogue defined in the automated process appears.



Chapter 7

Export and import settings

7.1 BvLArchivio Desktop App, Export Settings

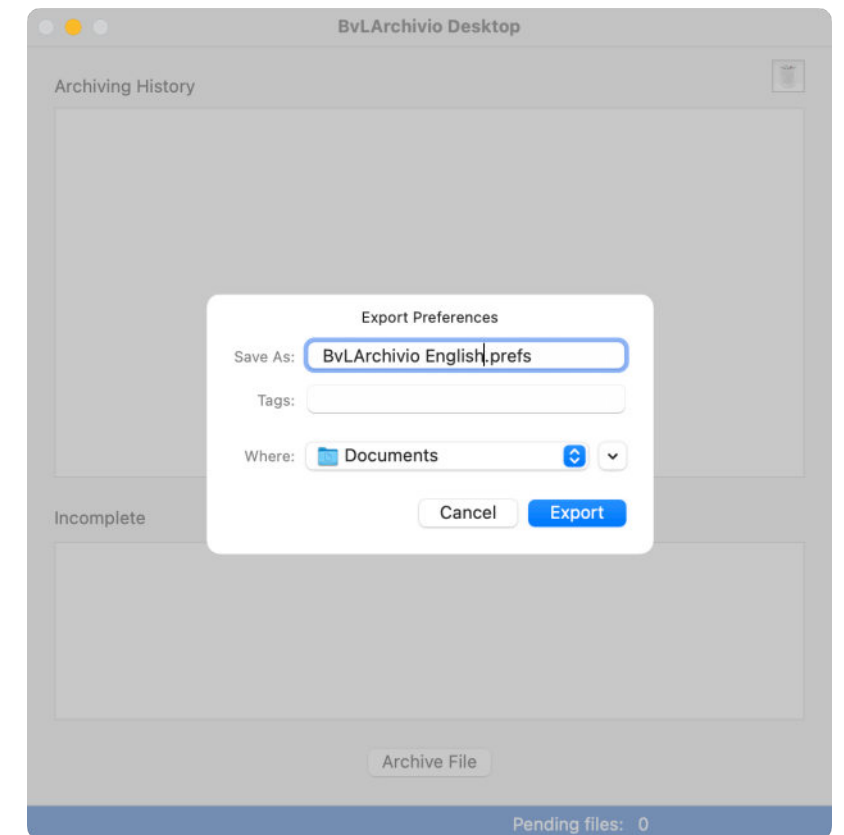


The export and import allows for a quick installation on multiple computers.

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.



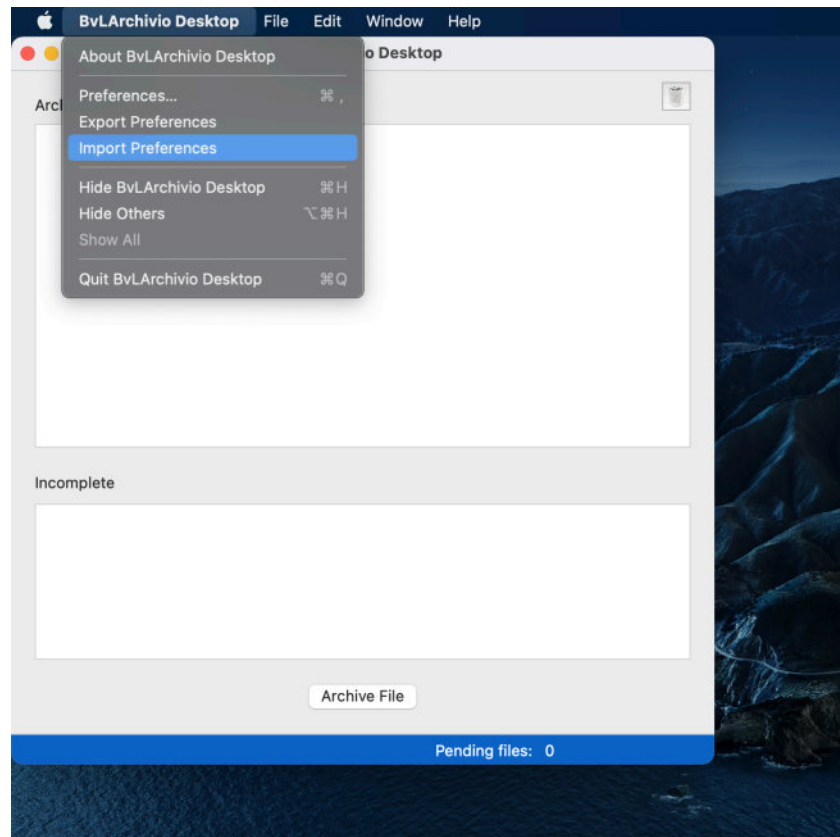
Export settings

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

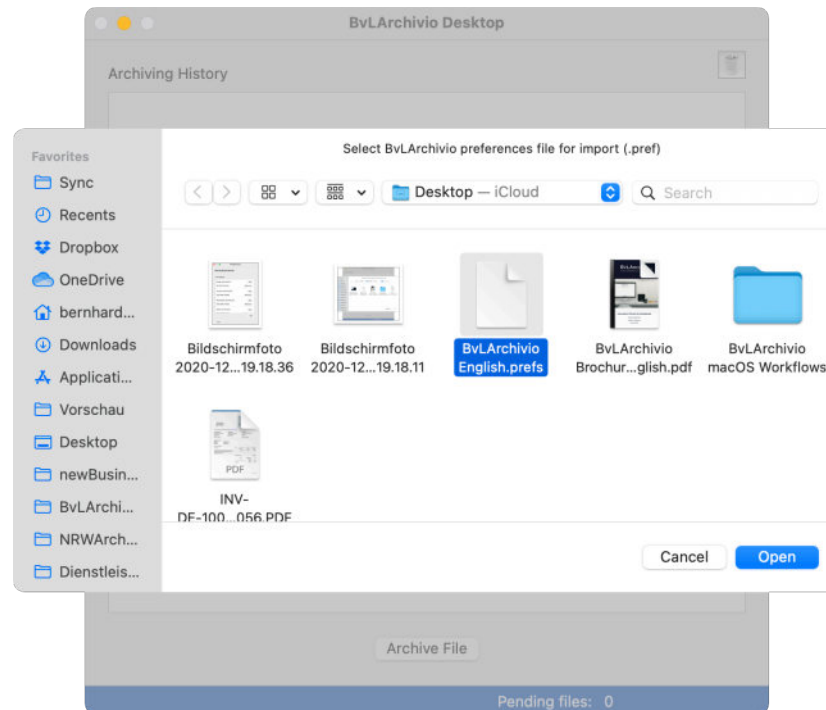


Picture left:

Import settings

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

Click on [\[BvLArchivio Desktop\]](#), and select [\[Import Preferences\]](#).



Picture center:

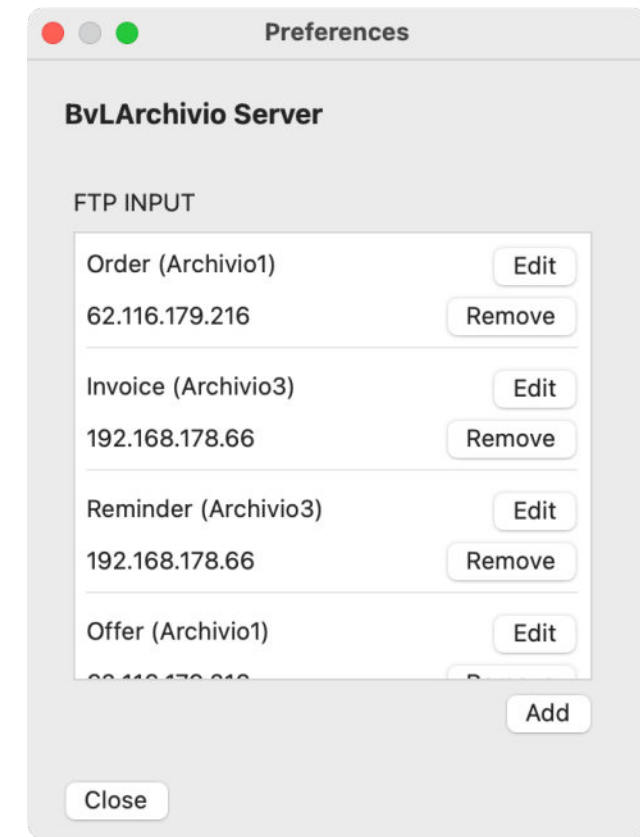
Select and open settings

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

The team

BvL.com

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E-Mail: Service@BvLArchivio.de

Internet: www.BvLArchivio.com


Hotline: 0800 272 44 846

TouchingCode GmbH

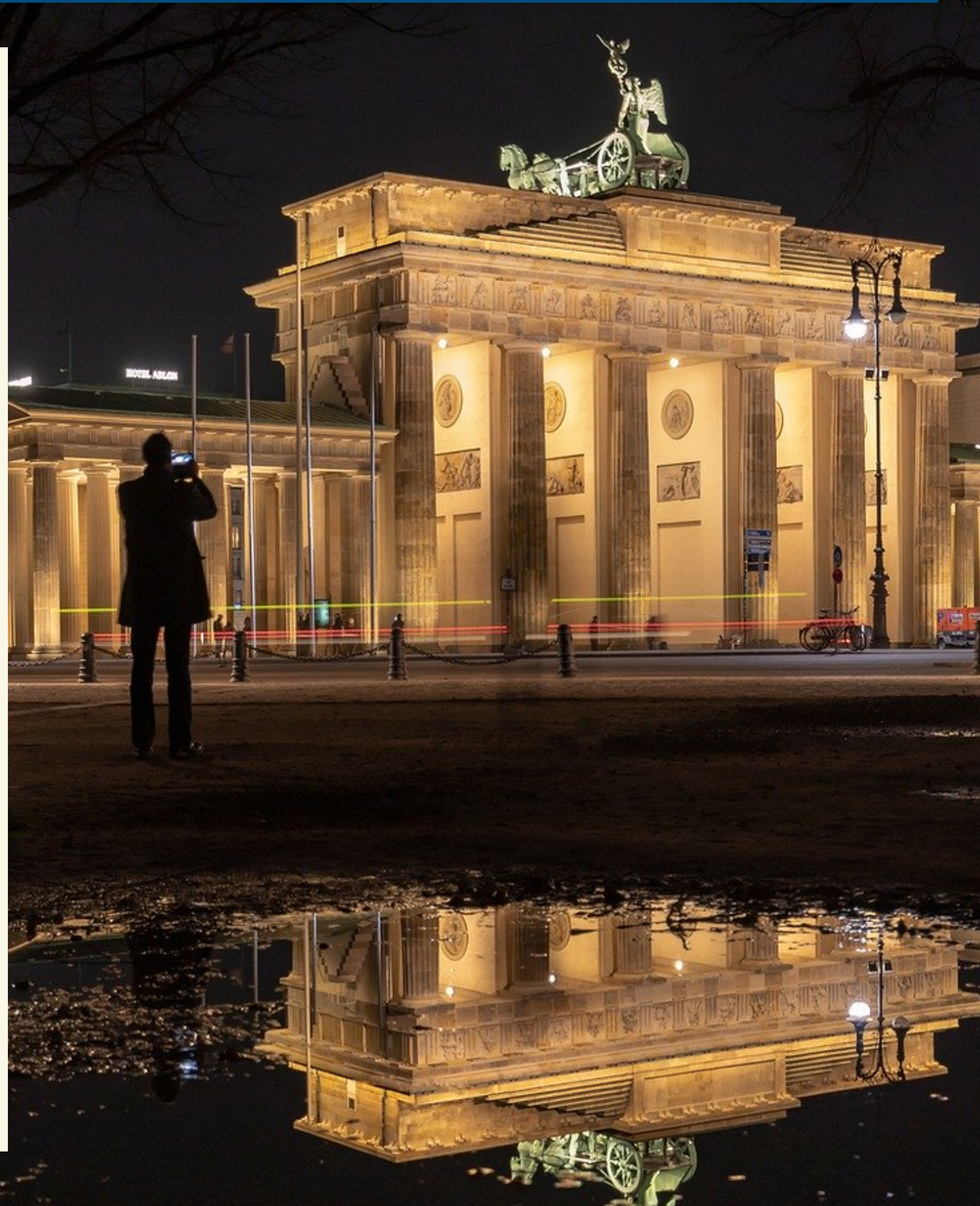
We would like to thank TouchingCode GmbH, Berlin for programming the app.

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)

