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Introduction

To get started with RetSoft, install the software first (kb/88).

To use this guide, select a topic you need information on on the left hand side, subtopics will then appear on the right hand side to quickly navigate the help pages.

You can also search for topics or keywords by using the search function on the left hand side.

In the top you can navigate to our FAQ if you need to, here you can find solutions and answers to known issues.

General information about RetSoft

Differences between RetSoft versions

If you currently have a RetSoft Archive 'Pro' or 'Business' license, you can always upgrade to RetSoft Archive 'Expert' or 'Business+' respectively. Contact your RetSoft supplier for more information.

To view a list of differences please visit [retsoft.com](http://www.retsoft.com/price-overview) (<http://www.retsoft.com/price-overview>)

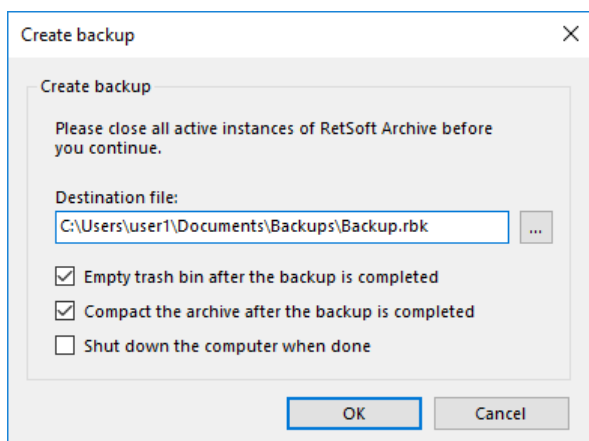
Making a back-up

Make sure to create backup copies of your database(s) on a regular basis to avoid unpleasant surprises.

RetSoft Archive Business/Pro

Creating a backup with RetSoft Archive Business

RetSoft Archive Business offers the possibility to create (and restore) backups directly from within the program. To do so, select 'File' in the main window of the program, and select 'Create backup...'. After this, you can choose a location for your backup file and change its name if required. We advise you to save the backup on a network drive, or removable disk. The following window appears:



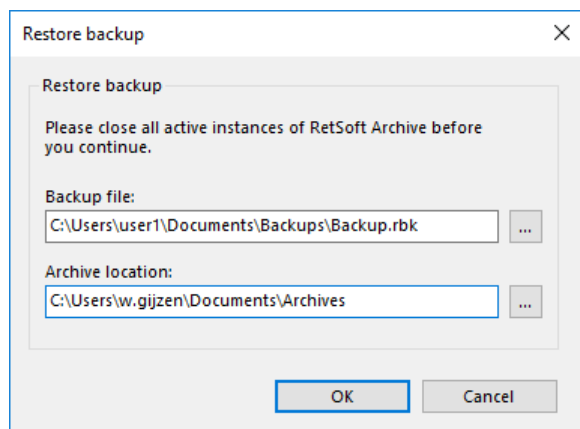
Here you can choose to compact the archive backup and empty the trash bin inside the backup. Because making a backup can take some time, you also have an option to automatically shut down the pc after the process is finished.

ATTENTION: If the backup fails, the pc will not shut down!

You can cancel the backup process at any time. If you are using processing rules (kb/129#133) they are not included in the backup. You will have to export them separately.

Restoring a backup with RetSoft Archive

Open the 'File' menu in the main window of the program and select 'Restore backup...'. The following window appears:



Select the backup file to restore and choose a location. Existing archives with the same name will not be overwritten. The name of the restored archive will be followed by 'Restored' instead.

Manual backups

Open the folder containing the databases. Refer to Archives (kb/91#93) for more information about the location and files of RetSoft Archive Archives.

Here you can select the archives made by RetSoft and copy them, then paste them to a different location. (A network drive for example)

Business+/Expert

Please consult your system administrator or the manuals of your specific RDBMS (relational database management system).

RetSoft does not support internal backups when using an RDBMS because these systems have their own backup systems in place.

Updates & Upgrades

RetSoft

Development and distribution:

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Installation of RetSoft

Software installation

After purchasing the software you have received an email containing the download links and license information of your purchase. We assume you have already correctly installed a scanner.

Attention! RetSoft Archive® can directly operate scanners that use the so-called 'TWAIN' standard. Please consult the manual that came with your scanner and make sure that your scanner supports TWAIN.

Download the installer from the customer portal and run it to install the software.

RetSoft Archive Business/Pro

Follow the steps of the installation procedure. When installing RetSoft Archive on a PC that is only to be used to search the archive, select the "Viewer" option. These stations do not work a version other than RetSoft Archive 'Pro' or 'Business' Refer to the license agreement for details. If the computer needs to restart after installing the software (the installer will notify you) please do so before starting RetSoft Archive.

RetSoft Archive Business+/Expert

Follow the steps of the installation procedure. By default RetSoft Archive 'Expert' or 'Business+' will be installed into the folder "C:\Program Files\RetSoft\RetSoft Archive Expert". During the installation procedure another location can be specified if needed. If the computer needs to restart after installing the software (the installer will notify you) please do so before starting RetSoft Archive.

Before you can start using RetSoft Archive 'Expert' or 'Business+' a database needs to be created or selected. Information about setting up the database server can be found under the chapter RetSoft Admin (kb/188). This chapter describes how to configure either a MySQL or an MS SQL Server database for use with RetSoft Archive. Basic database administration tasks, such as creating (or selecting) a database and user administration are explained in this chapter.

MySQL Server configuration

RetSoft Archive works with **MySQL 5.7.x**. You can find a short description of the installation and configuration for the database system below. The performance of RetSoft Archive depends heavily on the configuration of the DBMS and the performance of the server where the DBMS is installed.

We only support MySQL, and not forks like MariaDB or Percona Server etc.

Downloading, Installing and configuring MySQL

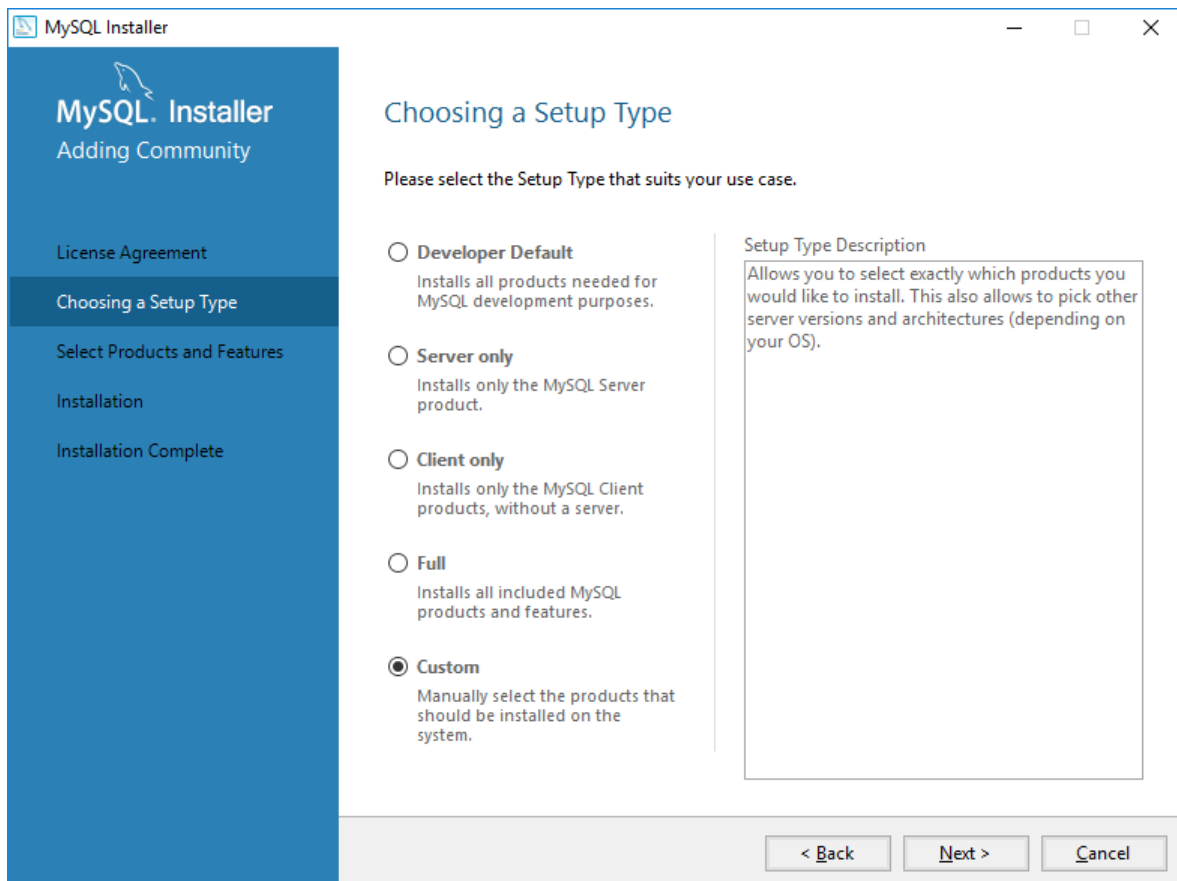
The first step is downloading the MySQL community edition (CE) installer. This installer package can be downloaded here (<https://dev.mysql.com/downloads/windows/installer/5.7.html>)

You must download MySQL Installer **5.7.x**. (**version 8 is not supported at the moment**). We recommend downloading the complete installer (not the web installer) which has a size of about 350 MB.

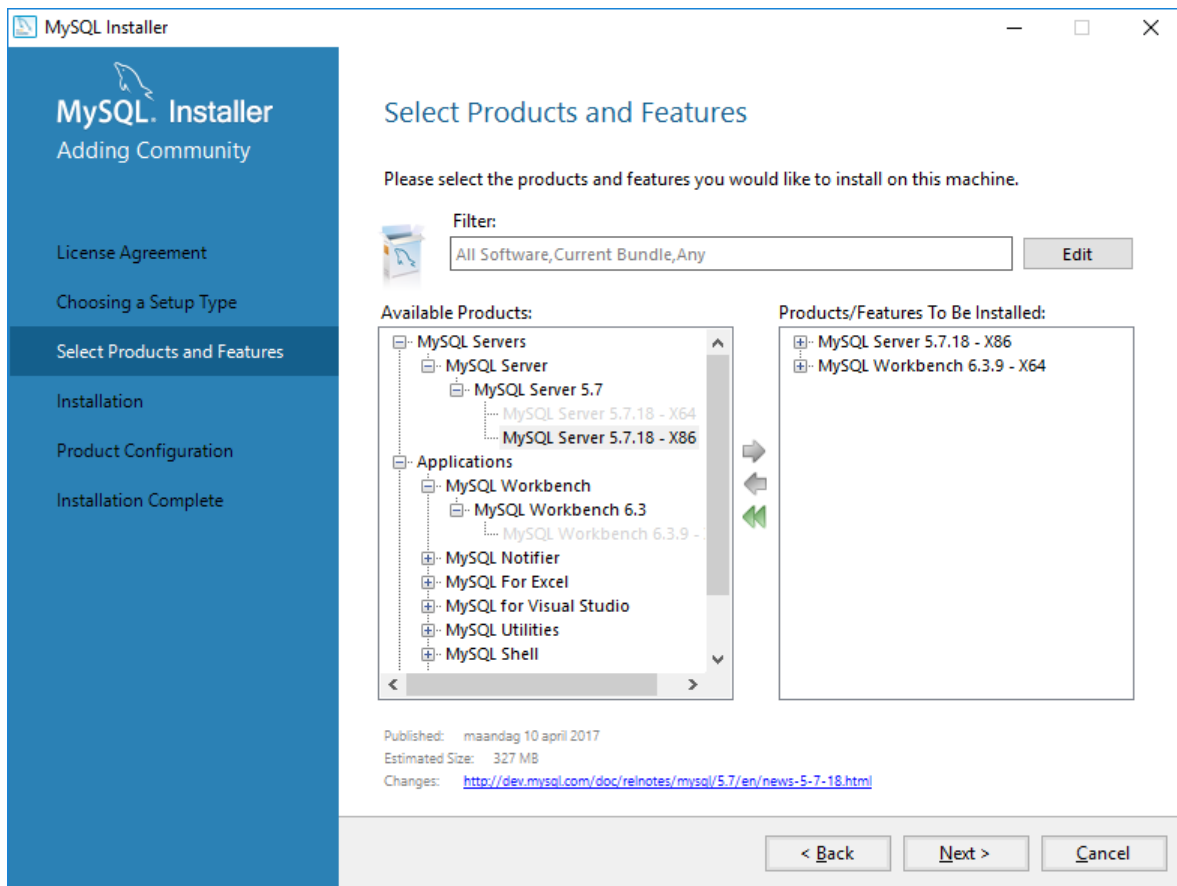
Please note that it **is not required to create an account** for MySQL.com, you can use the option "No thanks, just start my download" when asked to create an account.

Open the installer after the download has finished. This installer allows you to install several MySQL products. The products you need to install are the following:

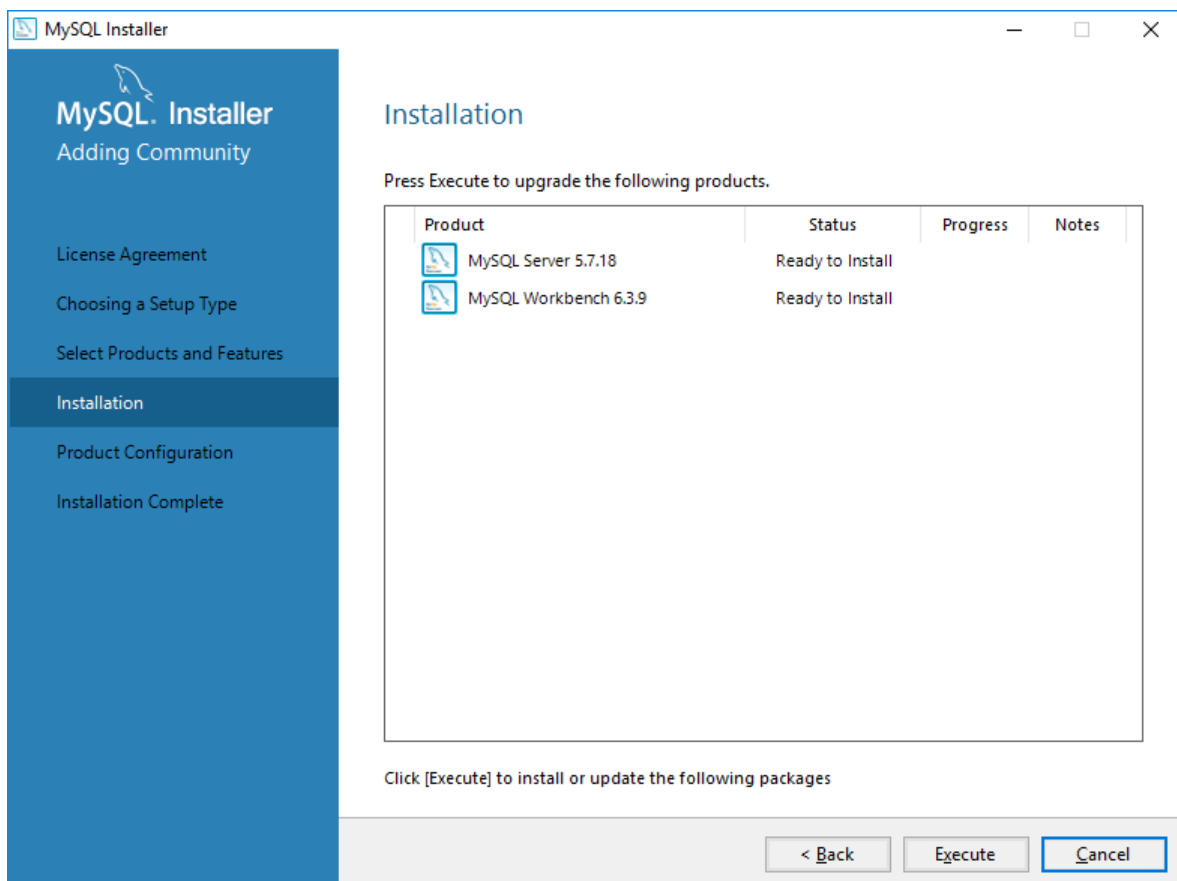
- MySQL Server (Version 5.7.x)
- MySQL Workbench (Version 6.3.x)



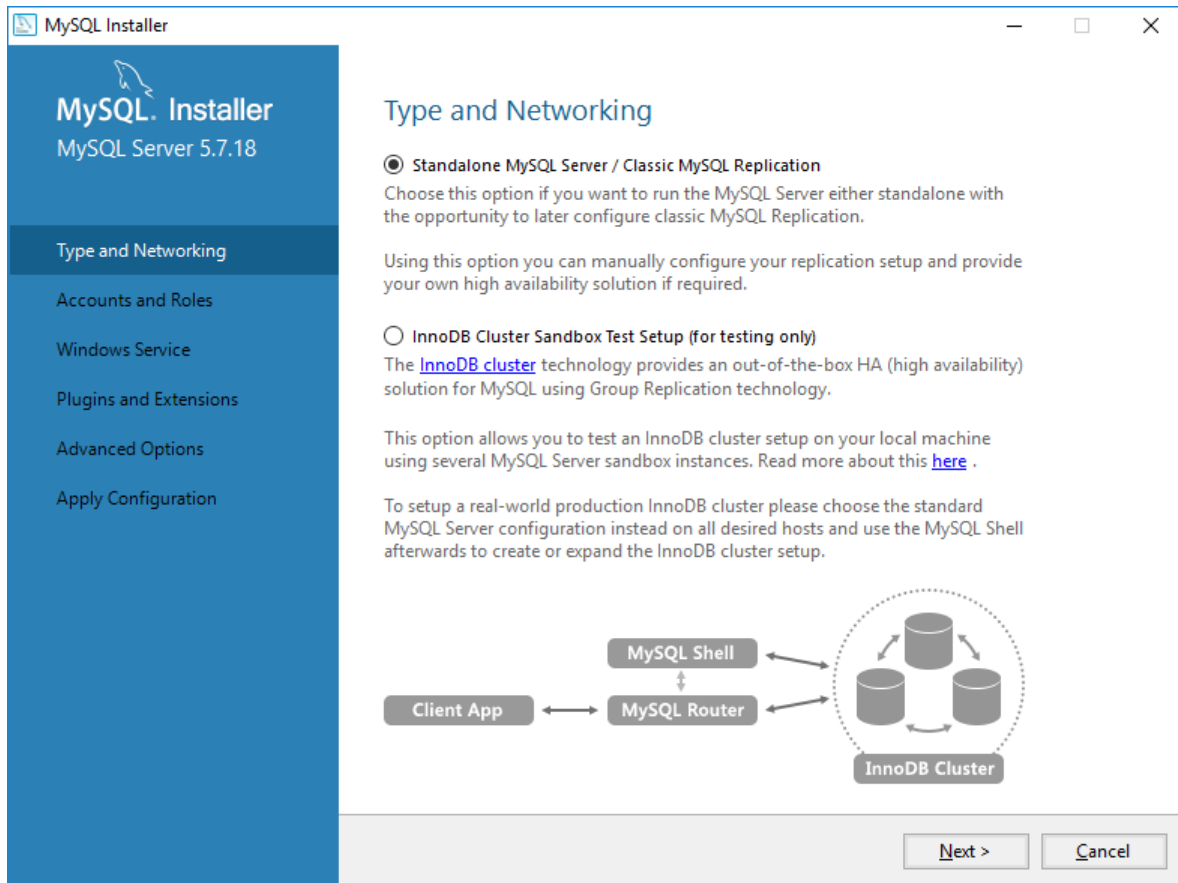
Select 'Custom' and click next.



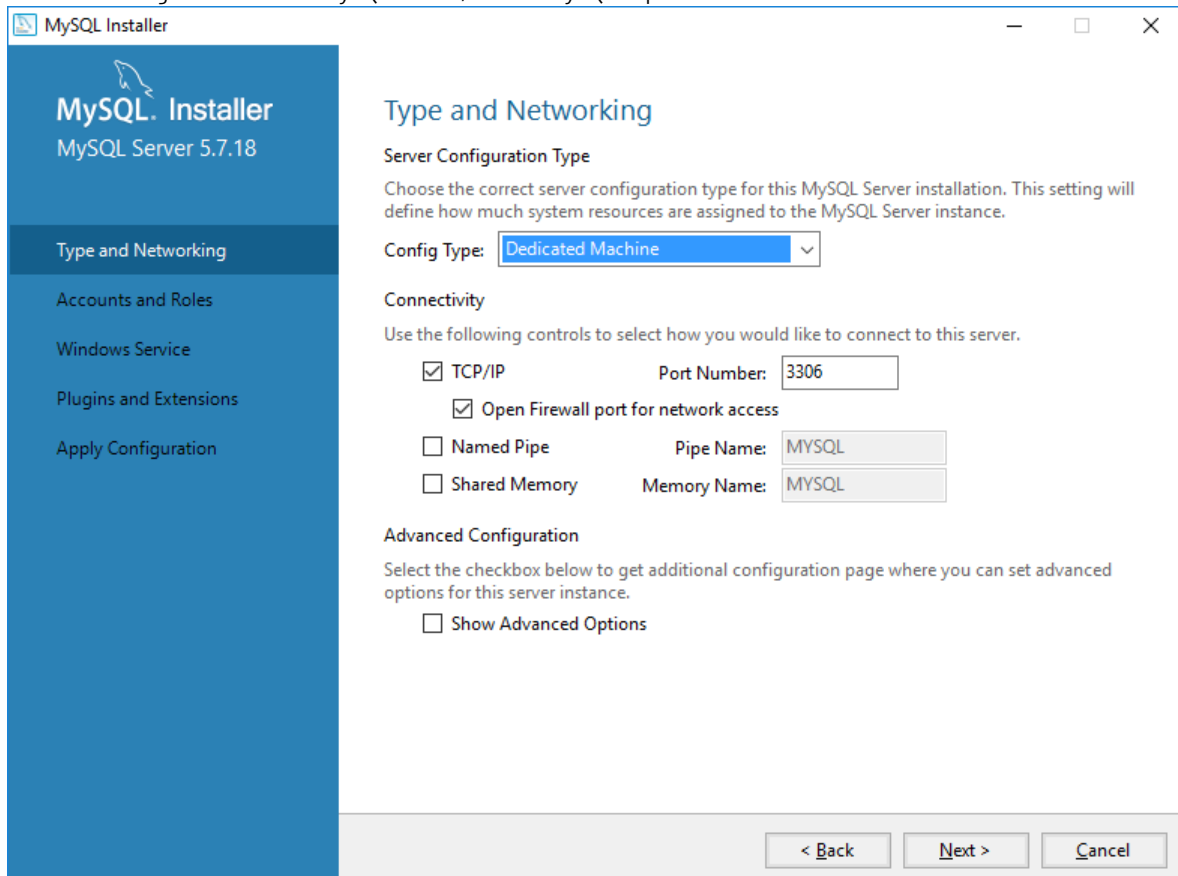
Select 'MySQL Servers' and proceed to select 'MySQL Server 5.7'. We support both X86 and X64. Click the green arrow to add it to the list of products to be installed. Do the same for 'MySQL Workbench 6.3'. In the product selection you can add both products by selecting a product and clicking the green arrow pointing to the right. After you've added both products to the install list select 'Next'.



Select 'Execute' to start installing. When the installation is completed, click 'Next' until you see this screen. Once both products have finished installing the configuration part is next:



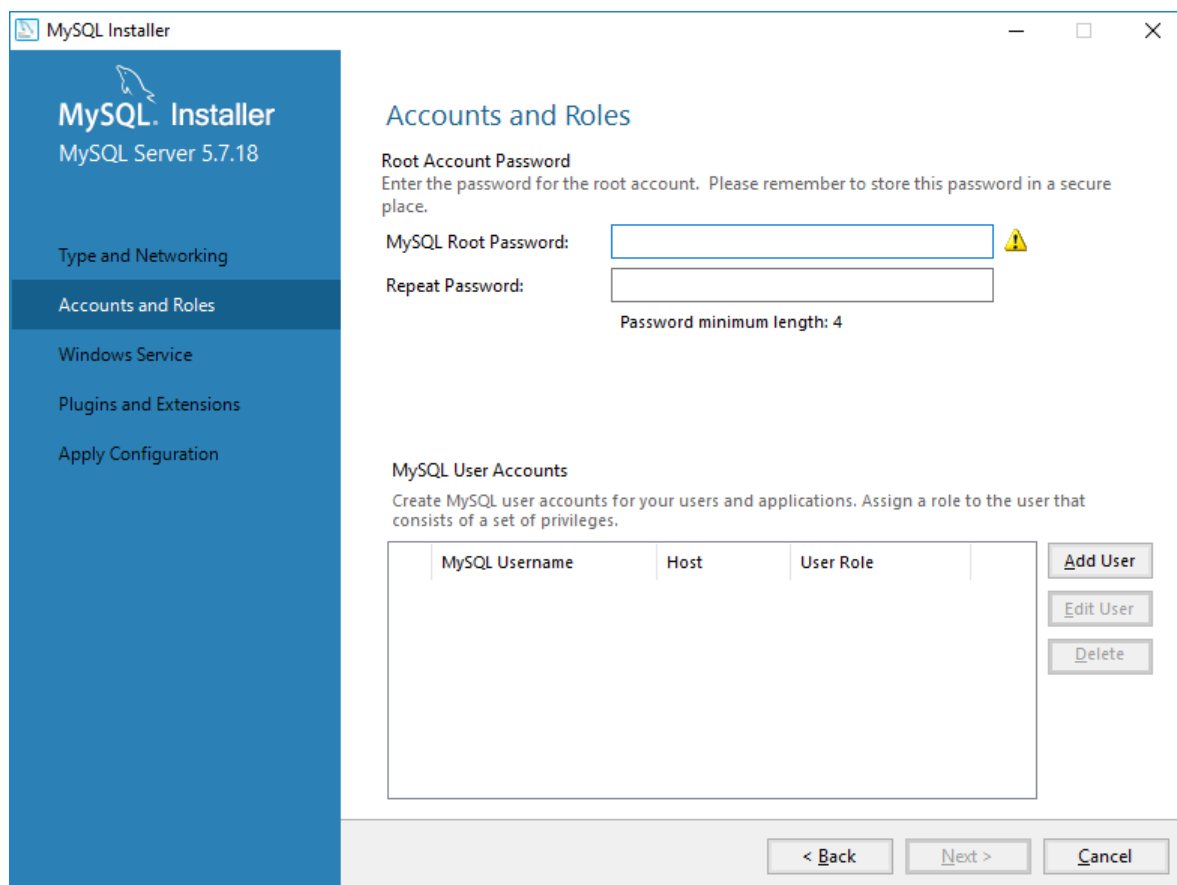
Leave the setting on 'Standalone MySQL Server / Classic MySQL Replication' and click 'Next'



First MySQL Server will be configured. At the first tab, 'Type and Networking', make the following selection:

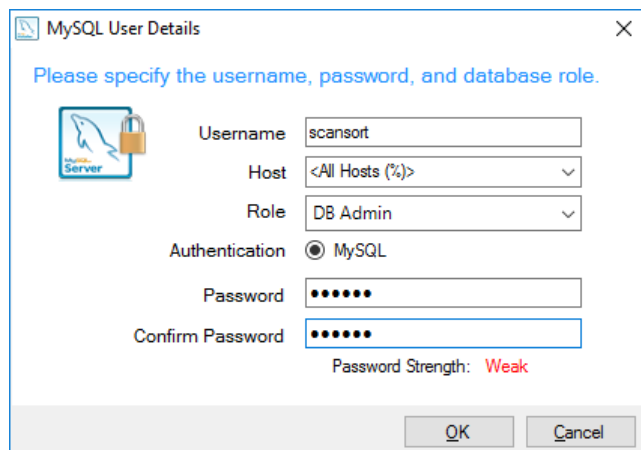
- Config Type: **Server machine** or **Dedicated Machine**

Verify the other settings, then press 'Next' to go to 'Accounts and Roles'.



The screenshot shows the 'MySQL Installer' window for 'MySQL Server 5.7.18'. The left sidebar contains the following options: 'Type and Networking', 'Accounts and Roles' (selected), 'Windows Service', 'Plugins and Extensions', and 'Apply Configuration'. The main area is titled 'Accounts and Roles' and contains two sections. The first section, 'Root Account Password', prompts the user to enter a password for the root account, with a warning icon indicating a minimum length of 4 characters. The second section, 'MySQL User Accounts', provides instructions to create user accounts and assign roles. It includes a table with columns 'MySQL Username', 'Host', and 'User Role', and buttons for 'Add User', 'Edit User', and 'Delete'. At the bottom, there are '< Back', 'Next >', and 'Cancel' buttons.

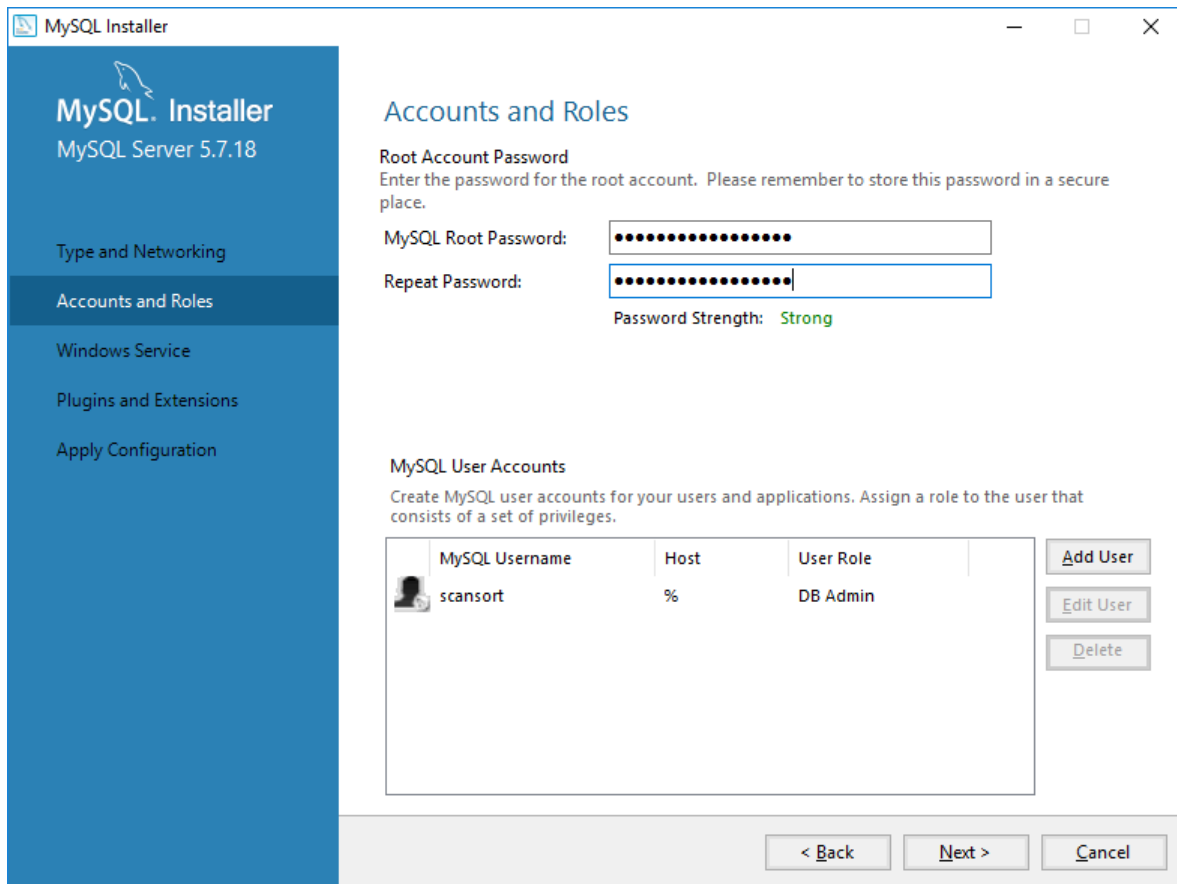
Here you can set a root password and add user accounts. Set up the root password to your personal preference, this is not important for RetSoft Archive, but make sure you remember the root password for future use. After you have entered a root password, go to 'Add User' under MySQL User Accounts and add a user with the following credentials:



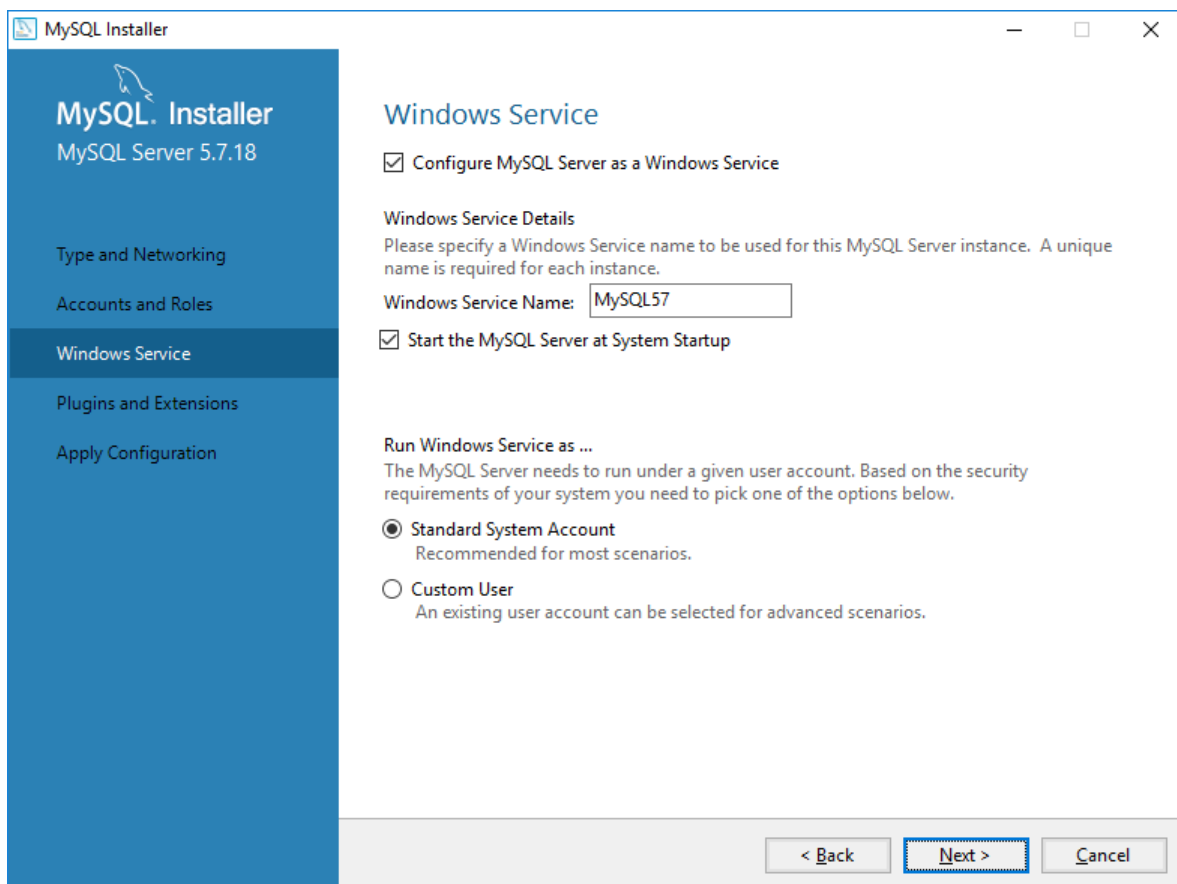
The screenshot shows the 'MySQL User Details' dialog box. It prompts the user to specify the username, password, and database role. The fields are: Username (scansort), Host (<All Hosts (%)>), Role (DB Admin), Authentication (MySQL), Password (masked with dots), and Confirm Password (masked with dots). The Password Strength is indicated as 'Weak'. The dialog box has 'OK' and 'Cancel' buttons at the bottom.

Username: **scansort**
Host: **Any Host or All Hosts**
Role: **DB Admin**
Password: **ssxprt**

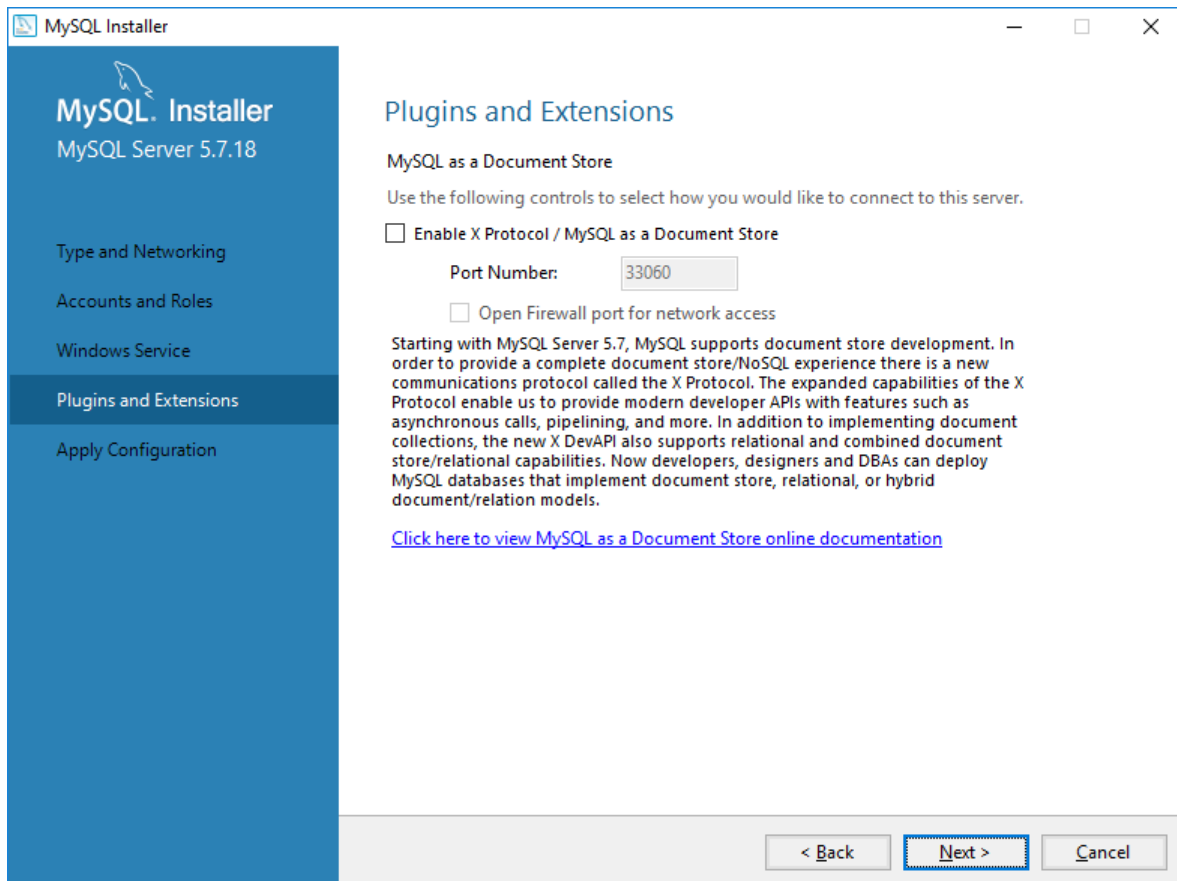
NOTE: Throughout the documentation we are using a fixed password for the user account "scansort". You can change the password to your own needs. Be sure to remember the password if you decide to change it. It is required to log into "RetSoft Archive – Admin".



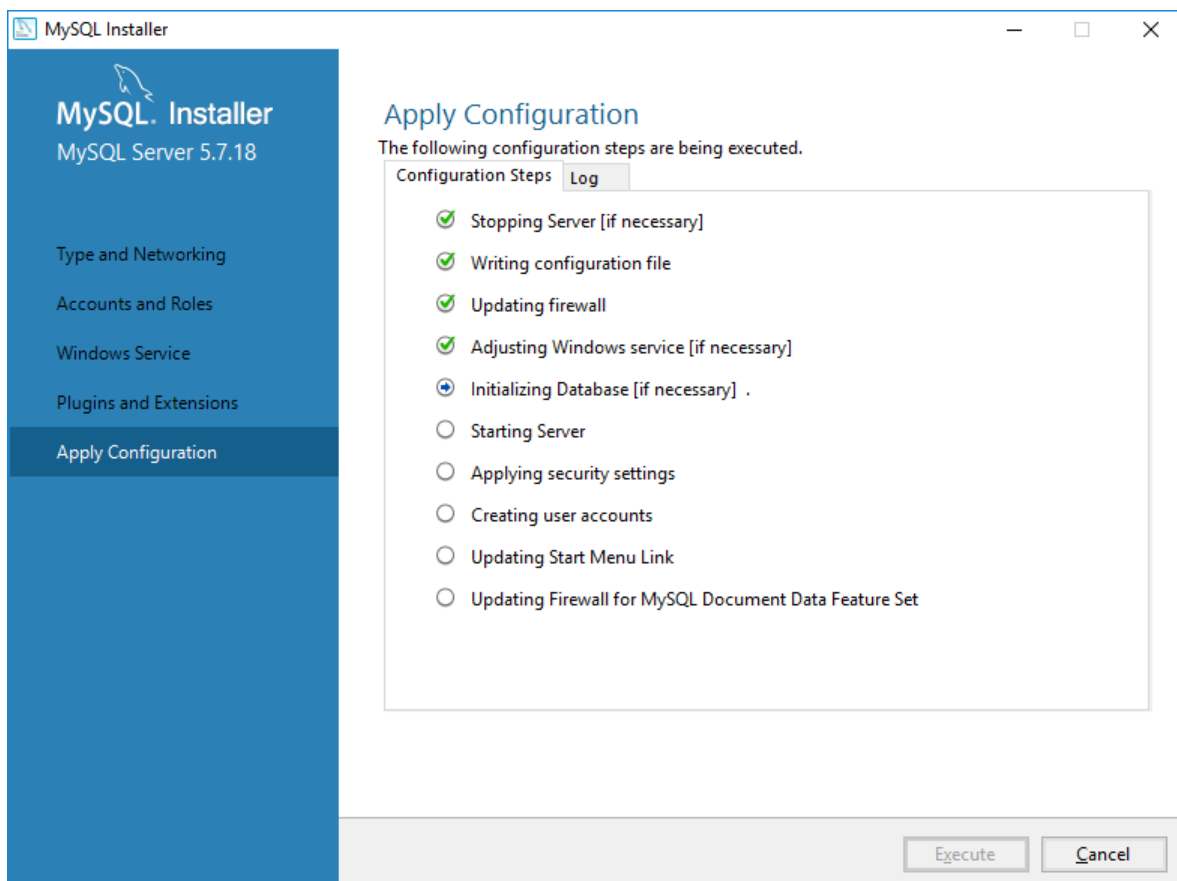
After adding this user, press 'Next' to go to the Windows Service tab.



Here you can setup windows-related settings. Generally, leaving the default settings will be fine. Ask your system administrator if needed. Press 'Next' again to go to the 'Apply Server Configuration' screen.



Don't change the settings of 'Plugins and Extensions', but click 'Next' to continue.
Click 'Execute' at the 'Apply configuration' screen to apply all the settings you have just entered.



Press 'Finish' after the server configuration has been applied, and then 'Finish' again to close the installer.

Editing my.ini

Now we need to edit the 'my.ini' configuration file. This is located by default in the ProgramData directory:
C:\ProgramData\MySQL\MySQL Server 5.7

Open the file 'MY.INI'

First you will need to check if there is a line saying 'max_allowed_packet=4M'. If this line is present you can simply change it to 'max_allowed_packet=32M'.

If you have trouble saving the file, try the following steps:

1. Open notepad as administrator
 - Search notepad via the Start Menu of windows
 - Right click the shortcut
 - Choose 'Run as administrator'
2. Open the 'My.ini' file via 'File' and then 'Open'

If you have trouble locating the my.ini file, try the following steps:

2. **Win+R** (shortcut for 'run'), type **services.msc**, Enter
3. You should find an entry like 'MySQL57', right click on it, select **properties**
4. You should see something that looks like 'C:\Program Files\MySQL\MySQL Server 5.7\bin\mysqld' --defaults-file='C:\ProgramData\MySQL\MySQL Server 5.7\my.ini' MySQL57
5. The path behind 'defaults-file=' should be the location of your my.ini file.

If this line 'max_allowed_packet' doesn't exist, you will need to do the following

Look for the following in this file:

[mysqld]

And under it add the following line:

max_allowed_packet=32M

So that it looks like:

[mysqld]

max_allowed_packet=32M

Finally, save and close this file. After restarting the MySQL service your installation should be properly installed and configured.

Your MySQL server is installed properly and ready to use!

Microsoft SQL Server Configuration

As of RetSoft 4.1, Retsoft Archive supports Microsoft SQL Server versions 2008, 2012, 2014, 2016 and 2017 (**all editions except: Express / MSDE**)

Installing Microsoft SQL Server:

1. Start the installation process by running the setup file.
2. Choose Installation: New SQL Server stand-alone installation or add features to an existing one. Proceed with installation.
3. At the 'Feature Selection' screen, select 'Database Engine Services' and configure other parameters if required. Also select the 'Management Tools' checkbox.
4. Optional: only for full-text indexing. Check The Full-Text Search checkbox. Press the 'Next' button.
5. At the Screen 'Instance Configuration'. Leave it on 'Default instance' Press the 'Next' button.
6. Server Configuration: [2008 only] On the 'Service Accounts' tab, choose 'NT AUTHORITY\SYSTEM' account. Make sure 'SQL Server Database Engine' and 'SQL Server Browser' are set to Automatic 'Startup Type'. At the 'Collation Setting' tab, no changes are required. Press the 'Next' button.
7. At the 'Database Engine Configuration' screen, choose 'Mixed Mode' option. You have to set a password for the sa (System Administrator) account. Remember this password. Press the 'Next' Button.
8. At the 'Error and usage report setting', no changes are required. Press the 'Next' button

Configuring for RetSoft Archive:

1. Make sure the SQL server is running before proceeding (the 'SQL Server - Service manager' can be used to see if the server is running).
2. Start SQL Server Management Studio.
3. From the tree on the left, expand the 'Security' node. Right-click on the 'Logins' item. Right-click and choose 'New login'.
4. Create the administrator user (without the quotes): 'scansort'; password: 'ssxprt*'. Fill in the user name, choose 'SQL Server Authentication' and submit the password.
5. Leave default Database on 'master'.
6. Uncheck the options 'Enforce password policy', 'Enforce password policy expiration' and 'User must change password at next login'.
The password policy forces users to use at least one number and one symbol, if preferred this can be left on.
7. From the tree on the left, select 'Server Roles'. Check the 'sysadmin' Server Role.

8. Press the 'OK' button in order to apply the changes and complete the configuration.

* Password

Throughout the documentation we are using a fixed password for the user account '**scansort**'. You can change the password to your own needs. Be sure to remember the password if you decide to change it. It is required to log into 'RetSoft Archive – Admin'.

Hardware installation

For the installation of your scanner please refer to its manual. Make sure you always have the latest drivers installed to avoid problems. The latest software for your scanner can be found on the website of the manufacturer.

RetSoft Archive® only works with scanners that work by the so-called 'TWAIN' standard. Almost all scanners for home use and (semi) professional use this standard.

Of course, scanners that do not come with a TWAIN driver, such as network scanners and copiers, can also be used simply by scanning into your inbox (kb/129#130).

Archiving is done best with a professional scanner that scans 15 pages per minute or more.

Buttons and menus overview




















Almost all features of RetSoft Archive are available through the menu's and popup menu's of the main window.

Popup menu's can be used by right clicking on folders, documents or on the viewer. Most features can also be accessed through shortcut keys and the toolbar.

Toolbars

The toolbar provides a quick and efficient way to reach some of the most used functionalities in RetSoft. It's quicker and easier than using the menu's but the most important and most used functionalities can also be reached with shortcuts.

RetSoft document selections

Name	Icon	Shortcut	Explanation
Scan (kb/91#96)		Spacebar	Starts a new scan session
Import files (kb/91#98)		CTRL + Spacebar	Imports file from the hard disk
Search (kb/104)		CTRL + F	Search folders and documents in the archive
Text Recognition (OCR) (kb/159)		CTRL + O	Performs text recognition on one or more graphical documents. Suitable for creating an archive that is fully searchable by its contents, or for exporting the contents to a text document
Memo's (kb/170#120)			Adds a memo to a graphical document
Print separator sheets (kb/170#212)		CTRL + N	Prints a separator sheets/barcodes
New folder (kb/91#94)			Creates a new folder in the archive
Send by email (kb/91#124)		CTRL + P	Sends the selected document(s) by email
Print (kb/91#126)			Print one or more documents
Export (kb/91#127)			Export files from the archive to the hard disk
Export to PDF (kb/91#127)			Export files from the archive to a PDF document
Export to Word (kb/91#127)			Export files from the archive to a Word document
Export to Dropbox (kb/91#127)			Export files from the archive directly into Dropbox, this requires a Dropbox account
Export to favourites (kb/91#127)			Export files from the archive to your favourites folder
Cloud (kb/153)			Share the main folder with the cloud
Settings (kb/91#135)			Open the settings window to change RetSoft settings
Move (kb/170#143)		CTRL + M	Moves the selected folder(s) or document(s) to another folder
Creating or editing processing rules (kb/129#133)			Opens a submenu which allows you to create or edit processing rules
Copy graphical document		CTRL + E	Creates a copy of the selected graphical document

Show properties (kb/91#110)		Display the properties of the database if the root folder is selected or display or edit the properties of the selected folder or the selected document.
Delete (kb/91#136)		Delete / Del Delete the selected document(s) or folder(s)
Email selection (kb/170#117)		Send the current drawn selection by email
Print selection (kb/170#117)		Print the current drawn selection
Recognize selected text (OCR) (kb/170#117)		CTRL + O Text recognition will only be applied to the current drawn selection, this enables you to efficiently add search words to the notes dialog of the document
Zoom in on selection (kb/170#117)		Zooms in on the current drawn selection
Crop selection (kb/170#117)		Replace the entire document with the current drawn selection
Copy selection (kb/170#117)		Copy the current drawn selection to a new document
First		Selects the first document or page
Previous		Selects the previous document or page
Next		Selects the next document or page
Last		Selects the last document or page

Image enhancements

Name	Icon	Shortcut	Explanation
Rotate (kb/170#116)			Rotates the selected graphical document(s) 90 degrees clockwise
Deskew (kb/170#116)			Corrects the angle of selected skewed documents
Invert (kb/170#116)			Inverts the colors of selected (graphical) documents
Despeckle (kb/170#116)			Despeckles the selected (graphical) document (May degrade quality when applied more than once!)
Sharpen (kb/170#116)			Tries to sharpen the document (May degrade quality when applied more than once!)

Display size

Name	Icon	Shortcut	Explanation
Zoom in (kb/170#118)		CTRL + +	Zoom in to the current document
Zoom out (kb/170#118)		CTRL + -	Zoom out of the current document
Fit to screen (kb/170#118)			Fit the current document to the screen size
Full width (kb/170#118)			Show the current document in full width

Shortcuts

RetSoft Archive supports the left, right, up and down arrow keys, as well as page up and page down to navigate through documents and folders and scroll through documents in the viewer.

Enter	Open a document or a folder displayed in the search results
Delete/Del	Delete selected document(s) and/or folder(s)
CTRL + A	Select all documents in the active window
CTRL + O	Apply OCR to the selected document(s)
CTRL + Shift + O	Display the recognized content of the selected document (if OCR has been applied)
CTRL + E	Edit the selected document or folder
CTRL + F	Open the search window
CTRL + G	Search in an open RetSoft-document (kb/170#113) or PDF
CTRL + P	Print the selected documents
CTRL + M	Move selected document or directory
CTRL + N	Create a new folder
CTRL + Spacebar	Import files
Spacebar	Start a new scan session
+ / -	Increase/Decrease the number of the selected document(s) if they're numbered
F1	Help
F2	Change name of selected document or folder
CTRL + +	Zoom in
CTRL + -	Zoom out
CTRL + Mousewheel	Zoom
R	Rotate RetSoft-document (kb/170#113) 90 degrees clockwise
D	Deskew a RetSoft-document (kb/170#113)
V	Invert a RetSoft-document (kb/170#113)

Working with RetSoft Archive

Creating and maintaining

Archives

When used for the first time, RetSoft Archive® opens an example archive. This archive is located in the 'Examples' folder. In Microsoft Windows Vista/7/8/8.1/10, this is 'C:\ProgramData\RetSoft Archive\Archives\Examples'.

After you have entered your license key you have the choice to either continue working with the example archive, or to create a new archive.

Creating a new archive

You can create a new archive by selecting 'File' from the menu in the main window followed by selecting on 'New archive...'. You will get the option to create a new *.rdb archive anywhere on your PC. Enter a name for your archive and select Save.

Note: The name of your archive may not contain any of the following characters: / \ : * _ | " "

Opening an existing archive

From the 'File' menu, select 'Open archive...' and browse to the location on your computer or network where you have placed your RetSoft Archive.

Previously opened archives are more easily available under 'File', 'Recent archives' in the order they have been opened last.

Finding a lost database

It is important to remember the location and name of your databases. In case a database is lost you can search for it in Microsoft Windows by searching for '*_*.rdb' (without the quotes).

After the search has completed a list of databases should be visible. Start RetSoft Archive and select 'File', 'Open archive...' and browse to the location of your archive (*.rdb file).

IMPORTANT

Each archive consists of a database file (*.rdb).

When using multiple archives it is advised to save archives in the same location so that you can find them when reinstalling RetSoft Archive or creating backups.

The use of multiple archive files can sometimes be preferred to separate file types.

It is highly advised to make backups of your archives, and save said backups on different hard disks or network drives.

Do not rename *.rdb files manually.

Do not put your archives in a synchronized folder like Microsoft OneDrive or Dropbox, this can cause corruption in your archive files as well as create safety concerns.

Compatibility

RetSoft Archives are not backwards compatible, this means that newer archives cannot be run by earlier versions of RetSoft.

Earlier versions of archives can be converted to newer versions using conversion tools (Available under RetSoft in the Microsoft Windows start menu).

Folders

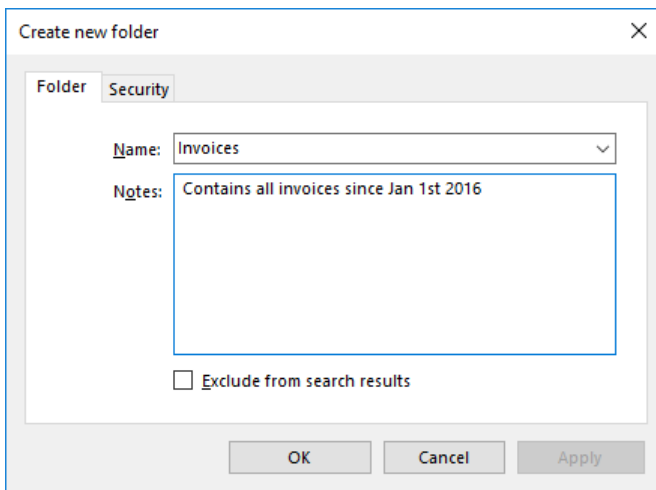
RetSoft Archive supports folder structures to keep your documents more organised, it can be used as a digital filing cabinet.

Correctly naming and structuring your archives folders can keep your archive ordered and maintain the high performance of RetSoft Archive.

We advise not to place more than 1000 documents in one folder.

Created folders are virtual folders inside your database file. They are not real folders on your harddrive and therefore cannot be found using Microsoft Windows.

Selecting the 'New Folder'  button will make the following window appear:



Enter a name for your folder in the top field (128 characters or less).

In the notes field you can enter more detailed information for your folder, this can later be used to find (kb/104) your folder more easily as this data is considered during a search.

By checking 'Exclude from search results' you can tag this folder to be ignored during searches.

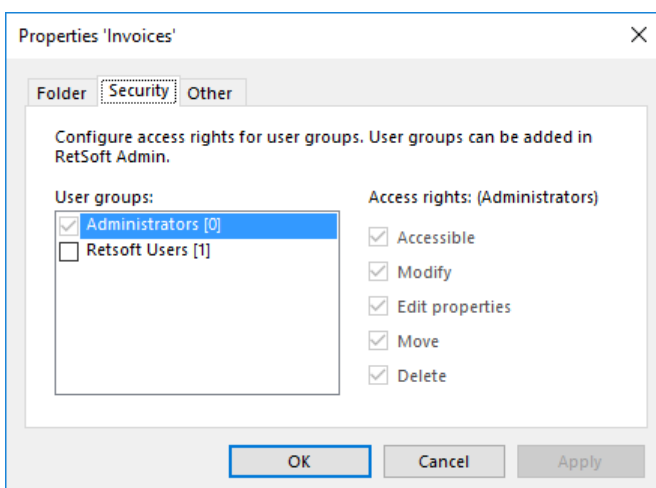
Select OK to create the folder, the newly created folder will now be the selected folder.

Note: it is also possible to create sub folders. To do so, make the new folder active, and select 'New folder' again.

We advice not to create more than 255 folders in one folder.

Setting access rights

When using RetSoft Archive 'Expert' or 'Business+' an extra tab 'Security' is visible while creating a folder or when right clicking a folder or document and selecting 'Show properties... (kb/91#110)'



This options make it possible for administrators to set access rights for specific usergroups on specific files and folders.

An administrator can for example make a selection of documents, and assign only 'read-only' (accessible) rights for one group while assigning 'read / write' (modify) rights for another group.

More information on groups can be found under 'Managing users and groups (kb/188#194)' in 'RetSoft Admin'

The following access rights can be assigned to usergroups for this specific folder here:


- Accessible - Users in groups with this right may see the files or folders.
- Modify - Users in groups with this right may modify, scan and import files or folders.
- Edit properties - Users in groups with this right may edit the properties of files and folders.
- Move - Users in groups with this right may move files and folders to other folders where they have this right.
- Delete - Users in groups with this right may delete this file or folder.

Access rights are inclusive, this means that if a user were to be in three groups and only one of these groups had the access right 'Accessible' assigned to a folder, the user can view this folder.

These settings can be set by selecting a group and then selecting the desired accessibility rights.

Settings are saved by selecting OK

Trash bin

To delete a document or a folder, select the item you want to delete and click the delete button (kb/147#149)  (hotkey (kb/147#152) Del) on the toolbar.

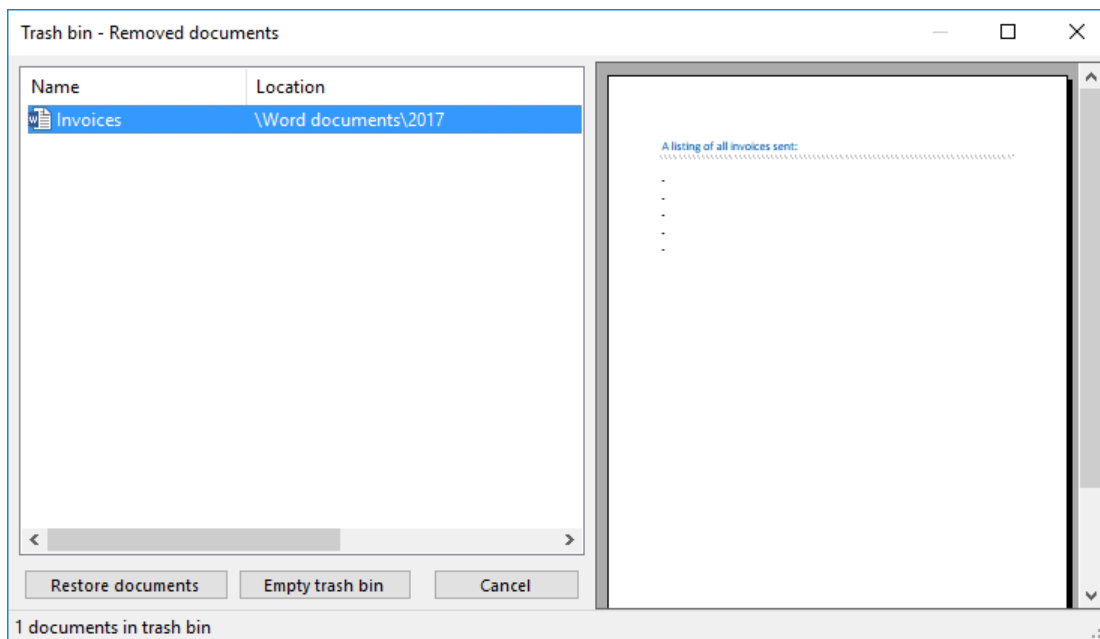
A confirmation dialog will appear. Press Yes to delete the selected document.

If you want to delete more than one document at once, use the 'Shift' and 'Ctrl' keys to extend your selection.

If a document has been deleted it is not completely removed from the archive yet as it is moved to the trash can instead.

You can access the trashcan through the menu 'File' and then select 'Trashcan'. The menu item already displays the amount of documents inside the trashcan.

Upon selecting the following screen will appear.




You can see a preview of the deleted item here.

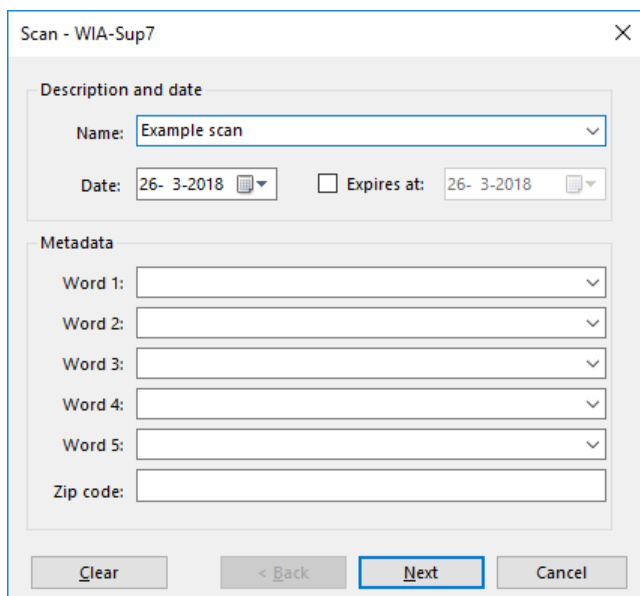
If you ever accidentally remove a document it can easily be restored by clicking 'Restore selection'. To definitely remove all deleted items you can click 'Empty trashcan'.

Scanning and importing documents

There are several ways in which you can import items into RetSoft Archive.

Scanning documents

Open the folder to which you wish to add the documents and then select the 'Scan' button (kb/147#149)  (hotkey (kb/147#152) spacebar) to open the following window:



Enter a name for the documents you are about to scan (128 characters or less).

Alternatively, you can also use the 'Scan with the same name' option which is available if you click on one of the documents in the document list in the lower left corner of the main window.

This option copies the name of the selected document into the 'Name' field of the new session window.

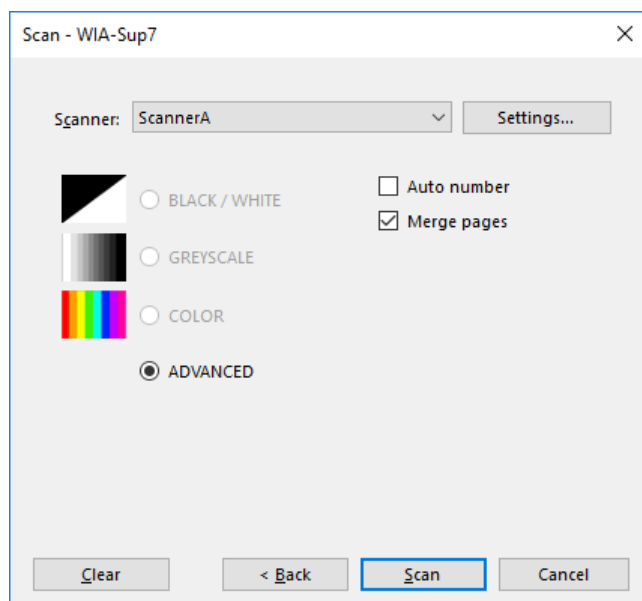
If you have entered predefined keywords (kb/135#208) in the 'Settings (kb/135)' window, you can select them by using the 'pull-down' buttons at the right of each field.

In order to be able to easily find your documents you can apply OCR (kb/159) which makes them searchable by content.

Extra keywords can be added to the documents in this step. The keywords you set will be added to all the documents (pages) you scan in this session.

You can also change the date (the current system date is used by default) and optionally set an expiration date (kb/170#211).

Press Next to continue to the following screen:



These are the settings that will apply to your scan session.

You can choose the following scan options:

- **BLACK AND WHITE** - Recommended as this setting has several advantages compared to other modes. It has the best result when printing, the smallest size, best OCR (kb/159) results and fastest loading times.
- **COLOR** - This setting can be used when the color preservation of a document is important such as when scanning articles from magazines or identification.
- **GREYSCALE** - This setting has the same disadvantages compared to BLACK AND WHITE that color has.
- **ADVANCED** - Use this option in order to use special (advanced) features of your scanner, or when your scanner does not respond to the predefined modes.
- **Auto number** - Check the 'Auto number' option if you want to number your scanned documents.
- **Multipage documents** – Select this option if you want to combine all the scanned pages into one single document (when for instance scanning a letter that exists out of multipage pages). If you want to scan multiple files at once, you can use separator sheets (kb/170#212).

Guidelines

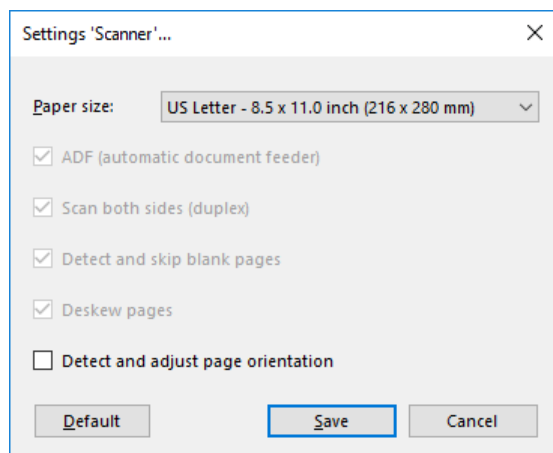
Color and greyscale are scanned on an average quality (150 to 200 DPI), and at 8-bit (256 colors).

Black and white should be scanned at high quality (300 DPI).

ATTENTION: If your scanner does not respond to the BLACK AND WHITE, COLOR or GREYSCALE mode, select the ADVANCED mode.

Some manufacturers build drivers that do not fully comply to the TWAIN-standard which can cause problems when scanning with one of the predefined modes.

Upon selecting settings the following window will appear:



You can change the following settings:

- **Paper size** – Paper size of the documents you are scanning. Useful when scanning photos (A5/A6).
- **ADF** – Automatic Document Feeder. Use this option when your scanner has an ADF and you are scanning more than one page. If you use a scanner that has both a flatbed option and an ADF, use this option to switch between them.
- **Duplex (Scan both sides)** – Scan both sides of a each page in your document (if your scanner supports this).
- **Detect and skip blank pages** – This option detects and skips blank pages while scanning. Especially useful when combined with the Duplex. This combination will save all pages that contain information, both front and back side.
- **Deskew pages** – Use this option to correct skew.

The above settings are saved by RetSoft Archive on a scanner specific level. This means that you don't have to change or verify them before each scan session.

If you have changed these settings you can choose to reset them to 'Default' when needed.

Select 'Scan' (or next when OCR (kb/159)) is enabled).

If OCR is enabled you will get a window which allows you the choice to enable OCR after scanning (kb/159#163).

Scanning with an MFP or network scanner

Scanning documents with an MFP (multifunctional device), copier or network scanner is also possible with RetSoft Archive.

If the device has a TWAIN driver you can even scan directly from RetSoft Archive. Direct scanning is explained above.

Configuring the device

In order to use a MFP, copier or network scanner, you need to configure the device to store the scanned documents in a shared folder somewhere in the network.

This folder will be attached to RetSoft Archive's inbox (kb/129).


RetSoft Archive supports PDF and nearly all types of common graphical file formats. We advise you to scan as much as possible in black and white TIFF's (type FAX G4) with a resolution of 300 DPI.

Color and greyscale should be scanned at 150 to 200 DPI and saved as JPEG. You can consult the manual that comes with your scanning device for more information about its configuration.

Importing files

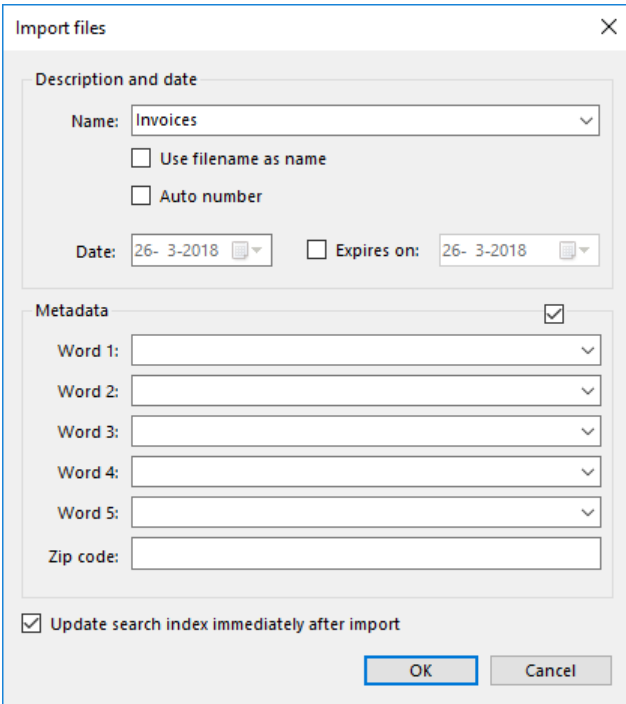
Besides scanning documents, you can also import files. You can import nearely all types of files.

HTML, MS Office, text and PDF documents can be viewed inside RetSoft Archive's viewer. Other types of files will be opened in their associated programs.

To import files such as office documents or PDF's, scans or images, press the 'Import' button (kb/147#149)  (hotkey (kb/147#152) Ctrl + Space).

In the window that appears you can select the files you for import. Use the Shift/Ctrl keys to select multiple files.

Once you have selected the files, select Open to continue:



The import window is similar to the scan window, with some additional options.

You can choose to use the filename (128 characters or less) as the documents name inside RetSoft Archive, and enable automatic numbering from here.

You can also choose to update the searchindex immediately after scanning.

Note: If 'Use filename as name' is checked and filenames contain more than 128 characters importing might not work correctly.

You can also use an inbox (kb/129) to import files.

Archiving email

RetSoft Archive provides the option to archive and show emails from all most common email clients.

For some of the more popular clients an add-in is provided that can be installed during the installation of RetSoft Archive.

Currently these clients are Microsoft Outlook 2003, 2007, 2010, 2013 and 2016, and Mozilla Thunderbird.

Emails are archived with the attachments included.

When possible they will also be searchable through content with help of the OCR Add-on.

Tip: You can simply drag and drop emails from Microsoft Outlook into any Microsoft Windows folder.

Import using add-ins

With add-ins you can copy the email(s) you select directly from the mail client into RetSoft Archive's inbox.

When using Microsoft Outlook you will find the link to the add-in in the application's menubar. The example below refers to Outlook 2016:

[IMAGE]

When using Mozilla Thunderbird, you can find the add-in by right-clicking on the selected email(s).

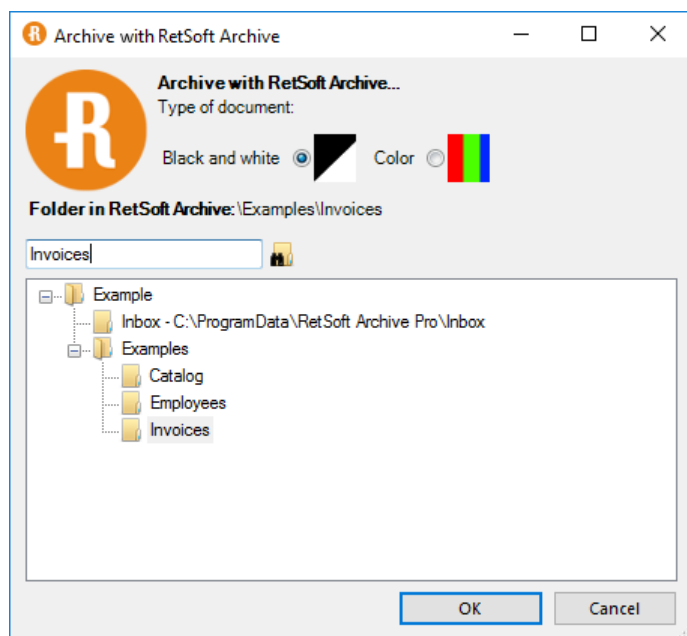
The menu that appears shows an option 'Archive with RetSoft Archive'.

Choose this option to start the add-in. Thunderbird also allows you to place a shortcut (button) into its toolbar.

Right-click on the toolbar and choose 'Customize'. The window that appears contains a RetSoft Archive icon, drag this icon onto the toolbar and click 'OK'.

More information about this can be found in the help content of Mozilla Thunderbird.

After you started the add-in, the window below appears in order to confirm the destination folder to send the files to. Once you have done this click 'Finish' in order to complete the export.



If there is no add-in available for your mail client, most clients provide a 'Save as...' option that allows you to save the emails.

Select an email you wish to archive, select the 'Save as...' option and browse to the folder that is linked to RetSoft Archive's inbox (or import the file using other methods).

Refer to Inbox (kb/129) for more information.

Archive from Microsoft Windows

You can archive directly from Microsoft Windows by selecting a file (or multiple files) with your right mouse button and selecting 'Add to RetSoft Archive'.

Select this and choose your target folder inside RetSoft Archive.

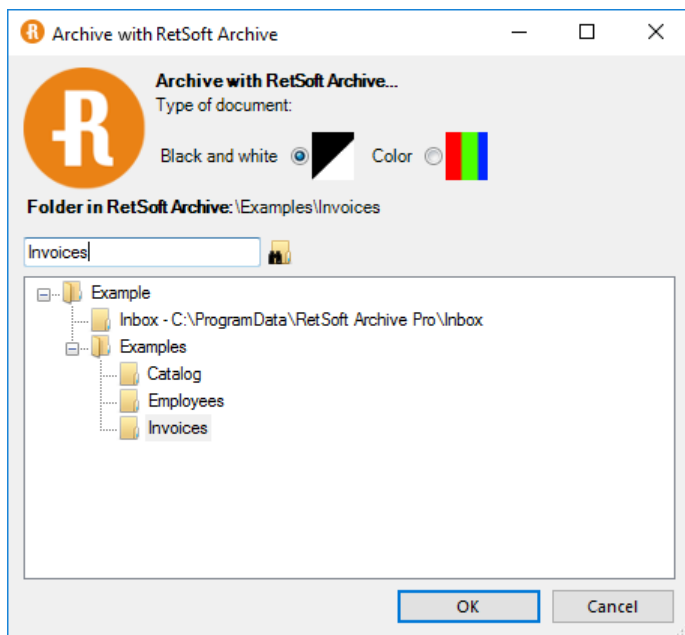
You can also simply drag and drop files from Microsoft Windows to RetSoft Archive and vice-versa (kb/91#128).

Just select several RetSoft Archive supported documents and drag them to a folder inside RetSoft Archive and the import process will start.

Archive from other applications

With the RetSoft Document Printer you have the possibility to archive from different programs when these programs have an option to print files.

You can start the RetSoft Document Printer by issuing a print assignment. Select 'RetSoft Document Printer' from the list of printers and start printing your file, the following screen will appear:




Much like when using the other options you can select a folder inside RetSoft Archive in this window, and import files into RetSoft.


Exporting documents

Like importing, there are several ways to export items out of RetSoft-Archive too.


As email

RetSoft Archive can send emails directly from within the application. All that is required is a MAPI compliant mail client. Select the document(s) you want to send by email from the search result or the documents list, and click the email button (kb/147#149)  to open your mail client's dialog.

By default, RetSoft-documents (kb/170#113) are converted into PDF before they are attached to the email. In order to send them as graphical documents, you can change this in the settings window.

In addition to sending an entire document you can also mail a selection of a graphical document via email. You can do this by making a selection (kb/170#117) and selecting the 'send selection by email' button .

As fax

When a fax-printer is installed documents can be faxed from within RetSoft Archive. Use the standard print button (kb/147#149)  to begin.


Then choose your fax-printer from the list of printers.

Printing


Of course you can also export a file directly to a printer by selecting the print button (kb/147#149) .

If you wish to print multiple documents at once select them and click the print button.


Exporting

The export button (kb/147#149)  offers you the option to save one or more selected documents to your hard disk as regular files. After you have exported the documents you can use them how you would regularly.

When you select more than one RetSoft-document (kb/170#113) they will be stored into one multipage TIFF file.

You can also export RetSoft-documents to PDF files (button (kb/147#149) ), and you can export your files with the OCR Add-on (kb/159).

In addition to making your archive searchable the OCR Add-on also gives you the option to make PDF's searchable during export and convert RetSoft-documents into Microsoft Word files (button .

Besides these options you can also export directly to Dropbox . You require a Dropbox account to do so, see www.dropbox.com (<http://www.dropbox.com>) for more information.

Dragging and dropping

You can also simply drag and drop files from RetSoft Archive to Microsoft Windows and vice-versa (kb/91#101). Just select several documents in RetSoft archive and drag them to a folder inside Microsoft Windows to start the export process.

Properties


The properties (metadata) of folders and documents can be viewed and edited when needed.

Documents

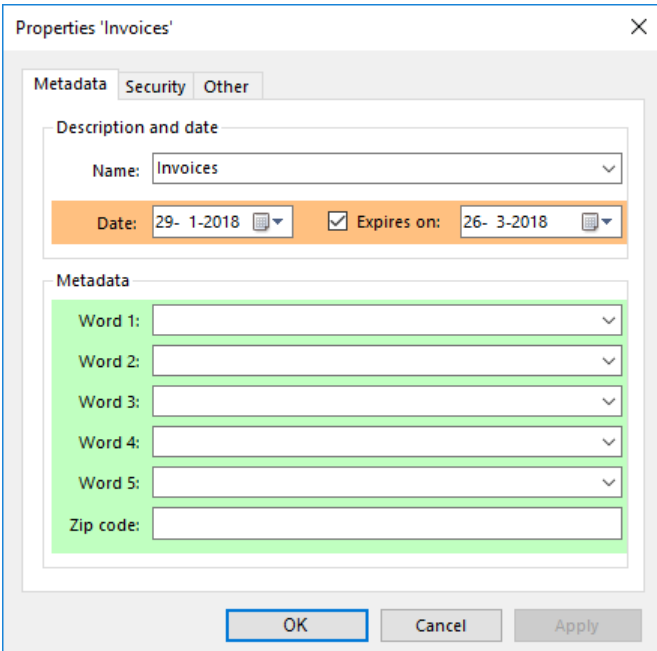
To every document in the archive different properties can be assigned. These properties consist of a name, different keywords, a zip code, a date and optionally an expiration date (kb/170#211).

By setting these properties, documents can be found more easily.

You can change the description of each property in the settings (kb/135) window.

The properties of a selected document can be obtained by using the toolbar button (kb/147#149)  (hotkey (kb/147#152) CTRL + E)

The following window will appear:



In this window you can view or change the properties of the selected document.

You can set its name as well as its metadata, date and expiration date.

The second tab lets you set its security and access rights when using RetSoft Archive 'Expert' or 'Business+'.

More information can be found here (kb/91#187).

Properties 'Invoices'

Metadata Security Other

Configure access rights for user groups. User groups can be added in RetSoft Archive Admin.

User groups:

- ☒ Administrators [0]
- ☐ Retsoft Users [1]

Accessibility: (Administrators)

- ☒ Accessible
- ☒ Modify
- ☒ Edit properties
- ☒ Move
- ☒ Delete

OK Cancel Apply

And the third tab shows you information about the document in question.

Properties 'Invoices'

Metadata Security Other

Indexed: No

Location: \\Word documents\2017

Size on disk: 12 KB

File type: Microsoft Word-document

Page count: 1

OK Cancel Apply

Folders

Folders have less properties than documents, mainly a name and notes field:

Properties '2017'

Folder Security Other

Name: 2017

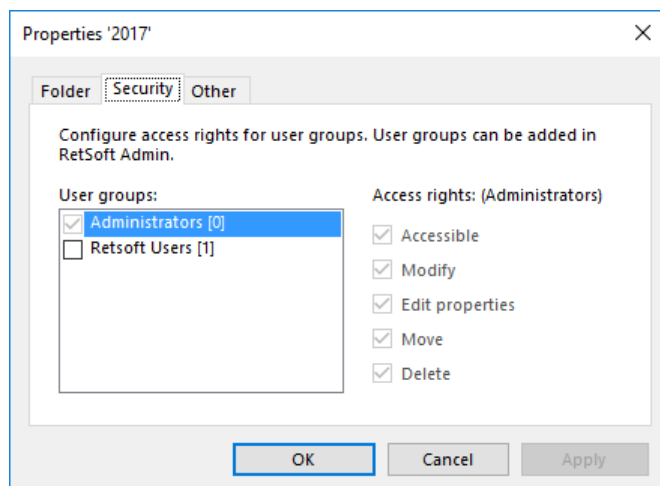
Notes:

☐ Exclude from search results

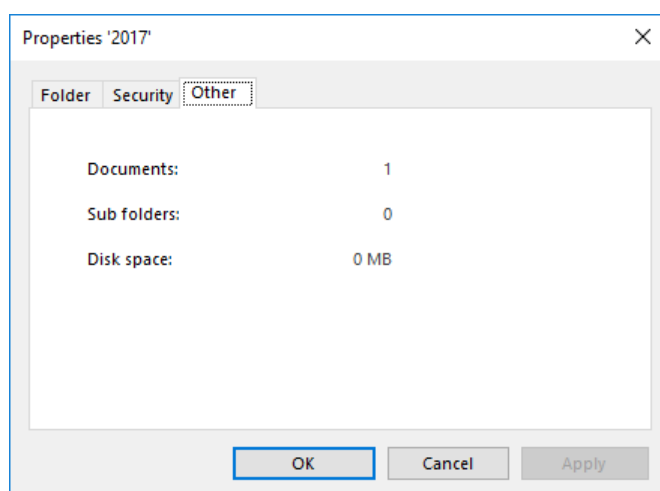
OK Cancel Apply

In addition you can set a folder to be excluded from search results (kb/91#94).

The second tab lets you set its security and access rights when using RetSoft Archive 'Expert' or 'Business+'. More information can be found here (kb/91#187).




And the third tab shows you information about the folder in question.



Settings

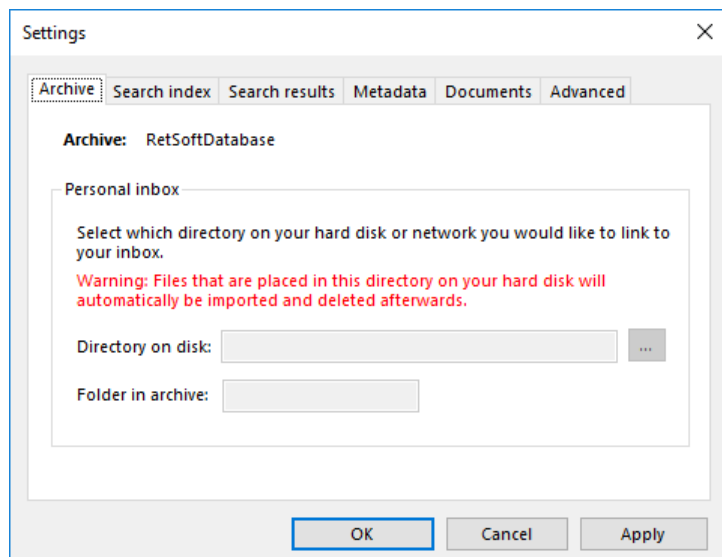
In 'Settings' you can configure your instance of RetSoft Archive further.

Click on the Settings  button (kb/147#149) in the main window. A settings window will appear.

This window contains 6 tabs which can be used to optimize your RetSoft Archive instance.

Archive

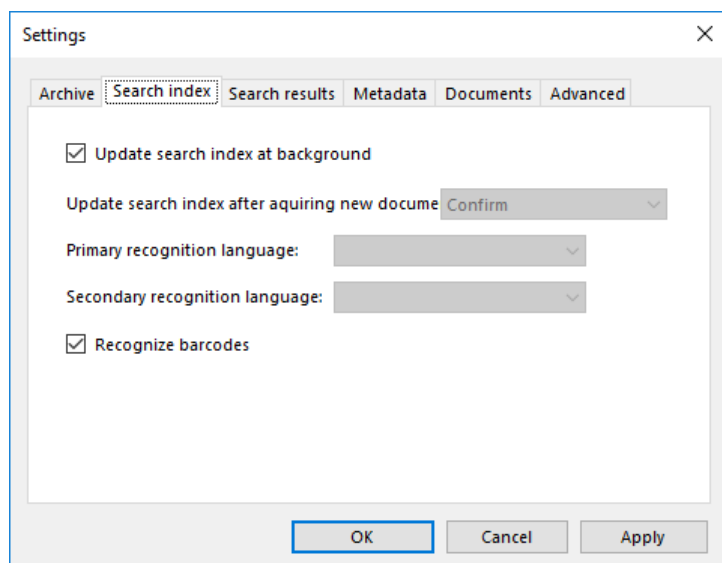
The 'Archive' tab shows your current archive:



In the archive tab you can select a personal inbox (kb/129) on your computer and link it to a folder in your archive.
Note: When logged in with the user 'scansort' it is not possible to link an inbox.
Files placed into the inbox folder will be uploaded to RetSoft and deleted when RetSoft Archive is active.

Search index

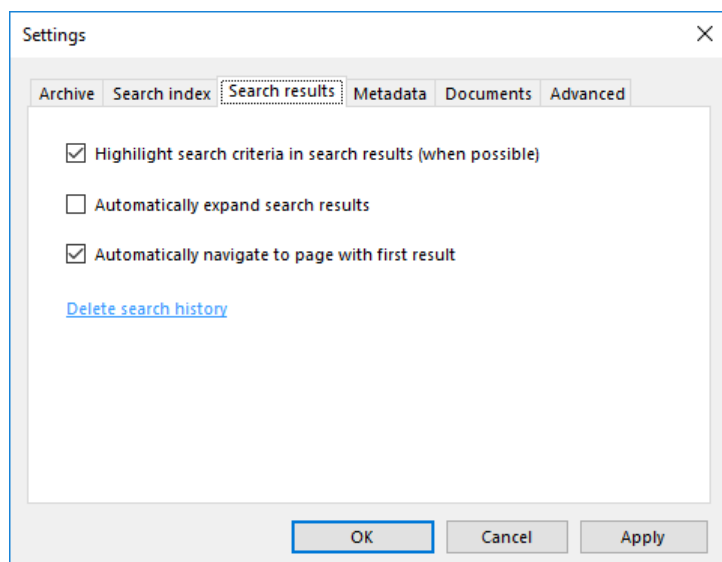
The 'Search index' tab shows your text recognition settings (kb/159#161) (OCR) settings:



You can select when to update your search index here, as well as your primary and secondary languages. More about these options is explained in the chapter about 'Text recognition' (kb/159)

Search results

The 'Search results' tab shows your search (kb/104) index settings:



Selecting 'Highlight search criteria in search results (when possible)' will make it easier to find your search results in documents by highlighting their positions.

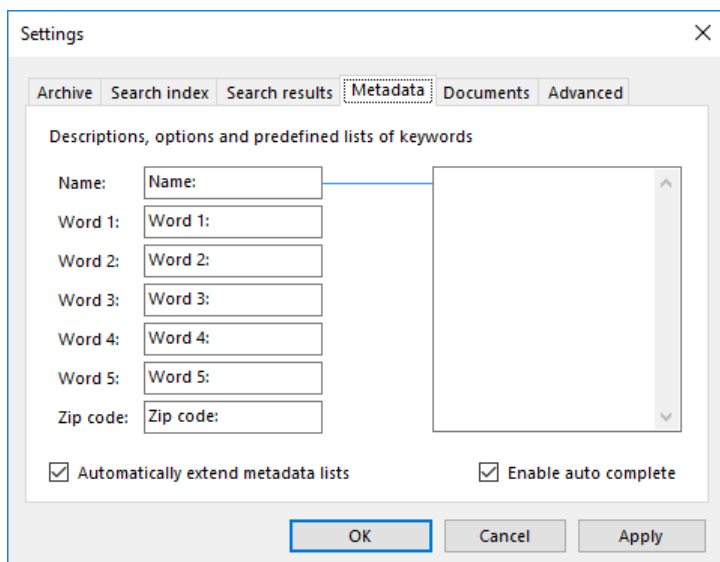
Selecting 'Automatically expand search results' will make your search result show up expanded upon searching.

Selecting 'Automatically navigate to page with first result' makes RetSoft automatically open the first document it finds when searching.

Delete search history is self explanatory.

Metadata

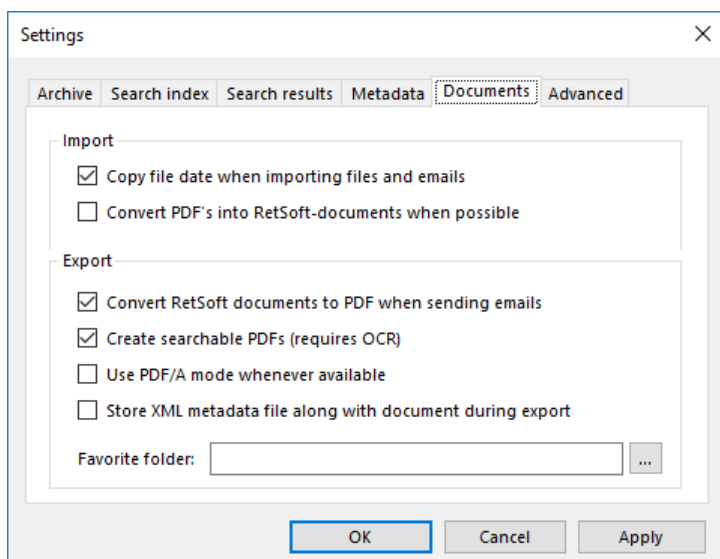
The 'Metadata' tab shows your metadata settings:



You can assign a more meaningful name to your metadata fields as well as enter some predefined keywords. You can choose to automatically extend metadata lists and enable auto complete when entering metadata by using the keywords defined.

Documents

The 'Documents' tab shows your settings concerning importing (kb/91#98) and exporting (kb/91#123) documents:



You can specify whether to copy file dates when importing files and emails, and convert PDF's into RetSoft documents (kb/170#113) on import whenever possible.

For export you can choose whether to convert RetSoft documents back to PDF when sending emailing them.

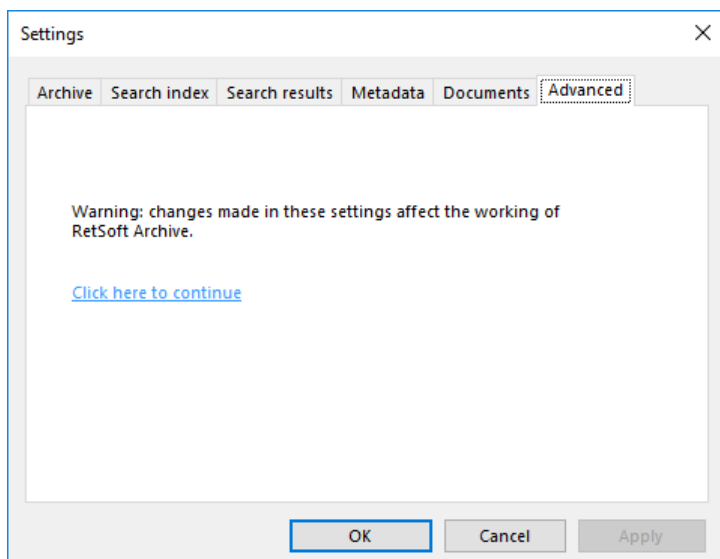
You can also specify whether PDF's should be made searchable by using OCR (kb/159), and use PDF/A mode when it's available.

Here you can also specify if you want the metadata of a file to be exported as an XML file alongside a document when exporting a document.

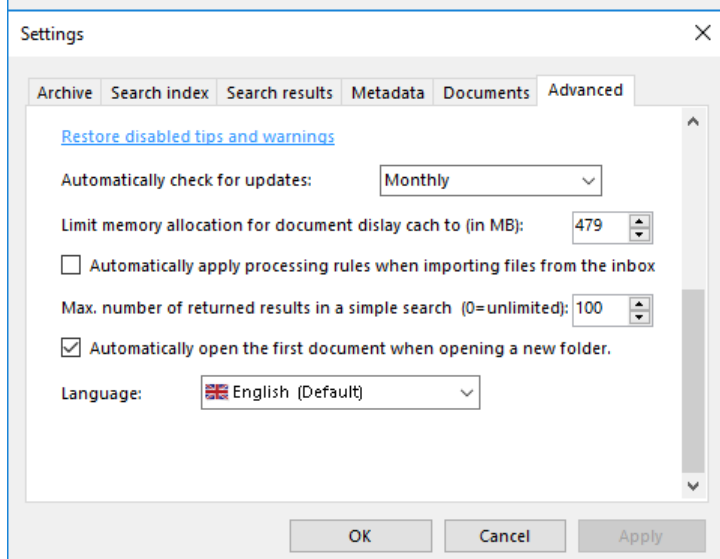
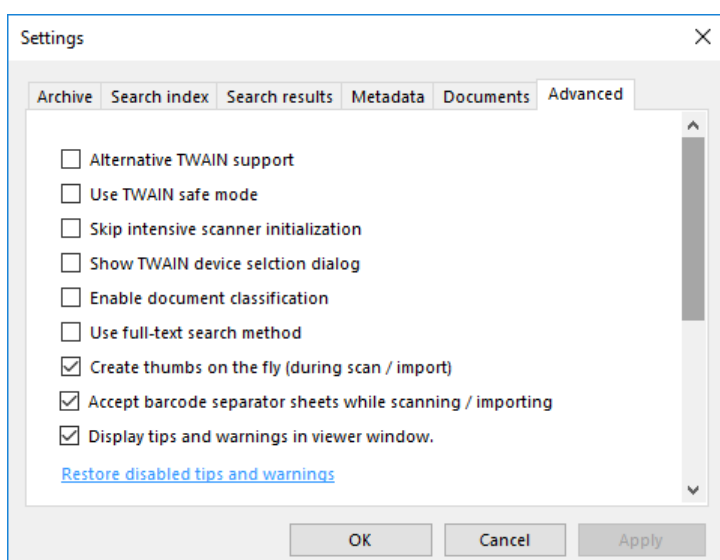
In addition, you can specify a folder for your favourites, where you can send documents to by pressing the 🌟 button (kb/147#149)

Advanced

The 'Advanced' tab contains options with the biggest impact, only change advanced settings if necessary.



Inside the advanced section you can change some application level settings. Some should only be changed if RetSoft Archive is operating incorrectly.



In addition you can change how often RetSoft checks for updates, and set your Language if needed.

Managing documents

RetSoft documents

RetSoft-documents are scanned or imported commonly supported graphical files, such as jpg, png, bmp and tiff's.
RetSoft-documents can be recognized by the 'R'-icon in the list.

Merging documents

RetSoft-documents can be merged into one multipage document. When viewing a multipage document, pages will be displayed below each other in the viewer.

In this case the active page will have a red border. The page number of the active page and the total number of pages are displayed in the statusbar at the bottom of the main window.

Multipage documents can also be split into single pages, as explained below.

Merging documents

Merging documents is done by using the the ctrl and/or shift keys to select the documents you would like to merge.

When this is done RIGHT click on one of the selected documents and choose the option 'Merge' in the menu that appears.

A new window will appear. In this window you can edit the properties (kb/91#110) of the multipage document you have created.

The properties of the first page of this document are set as default. Change them as you like.

Merging documents from search results

When merging documents from search results you are asked for a location where the multipage document that will be created should be placed. A

fter you have selected a location, properties can be edited as described above.

Scanning to a multipage document

In each scan session (kb/91#95) you can determine if the scanned pages should be saved as single pages or as one multipage document.

Creation of a multipage document is for instance useful when scanning a letter that consists out of more than one page.

Splitting documents

A multipage document can be split into seperate pages. To split a multipage document select the document that should be split and then click on it with the RIGHT mouse button.

Choose the option 'Split' in the menu that appears, the multipage document is replaced by separate pages with their original names (the names they had before they were merged).

Changing the order of pages / split off pages

When you open a RetSoft-document, a list of thumbnails appears next to the document. You can select and drag these thumbs. This is done exactly as descibed in 'Moving documents and folders (kb/170#143)'.

Selections

A selection inside a RetSoft-document can be made by clicking and dragging a rectangle in the document's view.

RetSoft Archive offers a number of options that are only applicable to such a selection.

These options can be invoked with the buttons (kb/147#149) on the toolbar or by selecting them from the popup menu that appears when you right click inside the selection.

Display settings

There are three different ways to size the display of a document.

The first one is to the set percentage through which the documents are sized for display. The second way is to show the entire document as large as possible.


The third way is to show the document in full width, this is also the default setting. This can be done using the display buttons (kb/147#151).

Tip: You can also zoom in and out of graphical documents by holding down the Ctrl key while turning the mouse's scroll wheel (if your mouse has one).

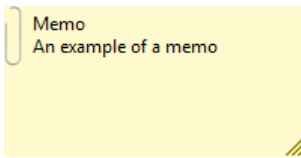
Memo's

By using memo's you can attach a comment to a RetSoft-document (kb/170#113).

Attaching memo's

You can attach a memo to a document the following way: right click the document to which you want to attach the memo and select 'Page', 'Attach memo' or click the 'Memo' button (kb/147#149)  in the toolbar.

A yellow memo field will appear in the upper left corner of the document:



It in this field you can type your comment. Right click on the memo to display a popup menu that shows some options.

Showing and hiding

You can hide your memos one of the following ways:

- When moving the mouse pointer over the paper clip in the corner of the memo you will notice that it lights up. If you click this paperclip the memo will be hidden. The paperclip will remain visible in the upperleft corner of the document. Click this paperclip again to display the memo.
- If you click the 'Memo' button in the toolbar the memo will disappear. Clicking it again will display the memo.
- Right click the document and select 'Page', 'Hide memo' from the menu that appears. To display the memo, right click and select 'Page', 'Display memo'.

Note: a document with a hidden memo is recognized by the paperclip in the upperleft corner of the document.

Resizing and moving memos

You can move a memo by holding down the left mouse button on the edge of the memo (in this case you will see the mouse pointer change).

The size of the memo can be changed by holding down the left mouse button on the lower right corner of the memo.

Note: Both the size and the position of the memo are saved.

Deleting memos

You can delete a memo by clearing its text or by selecting the 'Remove memo' option, available from the right mouse menu on the memo.

PDF documents

There are several types of PDF-documents. In RetSoft Archive we separate them into three main categories:

- Image-only PDF: This is a type of PDF where the PDF-generating program places a 'layer' around the image and text. It looks like a proper PDF, but it's really nothing more than an image that can be read as a PDF.
- Searchable PDF: Same as above, but using OCR-technology an additional text-layer has been placed over the PDF.
- PDF normal: Generally speaking this is text with a layout, such as a word document or a digital invoice.

Image-only and searchable PDF-documents are converted to RetSoft-documents (kb/170#113) when importing whenever possible. Exception in this case is the 'compact-PDF' format that is being supported by several MFP machines. Whenever possible set your MFP/scanner to output TIFF or PDF.

Moving folders and documents

When a user has the rights (kb/91#187) they can move files and folders.

Note: Rights are not needed if you are using RetSoft Archive 'Pro' or 'Business'.

Move folders

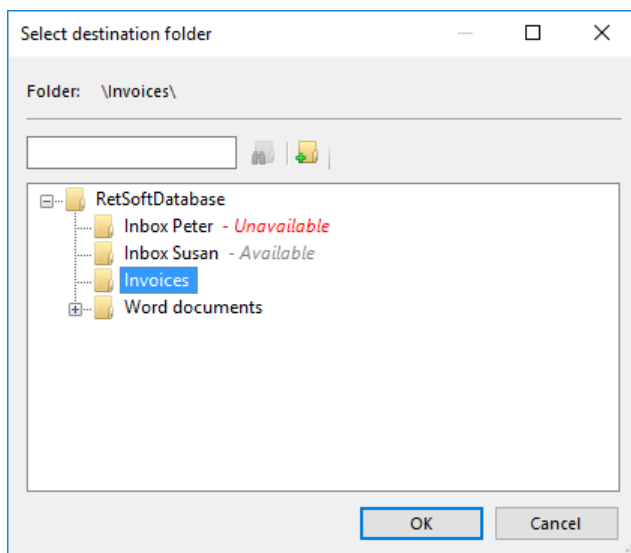
Moving a folder can be done in two ways. First, select the folder you wish to move.

One way to move the folder is by dragging it to the folder you want it to be moved to.

Just like you would do in Microsoft Windows, keep the left mouse button pressed while dragging.

Another way is by clicking on the 'Move' button (kb/147#149)  and selecting the target folder from the dialog that appears.

This gives you the possibility to search for the target folder at any time or create a new target folder if necessary. The following window will appear:



Moving documents

Moving documents is done in the same way as moving folders. By pressing and holding either the 'Shift' or 'Ctrl' key while selecting the documents, it is possible to select multiple documents for moving.

Moving from the search results (kb/104) is also possible and works the same way as moving from the documents list.

Expiration date

An expiration date of a document is an optional date field which can be used to filter documents in the archive.

An expiration date is set during scanning or importing of new documents, or by modifying a document's properties.

By executing an advanced search (kb/104#106), you can search for documents that are expired or not.

Separator sheets

A RetSoft Archive separator sheet is a special page that contains a barcode. Use this sheet to combine separate pages into several files.


If you place a separator sheet between each file, they will be split during the scanning process.

You do not have to start the scan session (kb/91#95) from the application itself. RetSoft Archive separator sheets can also be used during the import (kb/91#98) process.

If you scan the documents into one multipage TIFF file, and save them into RetSoft Archive's inbox (kb/129), or import them manually and they will also be processed.

Separator sheets do not work if you save your scans as a PDF!

Printing

You can print the separator sheets from the 'Settings (kb/135)' window, or by clicking the barcode button (kb/147#149)  in the toolbar of the main window.

ATTENTION: For best results, do not copy the separator sheets. Print multiple ones instead, preferably on a laser printer.

Your inbox

An inbox is a folder in your archive, called 'Inbox' which is linked to a folder on your hard disk.

When files are placed into the physical folder on your hard disk or network, they will be automatically imported (moved) into the linked folder in the archive.

An inbox operates as follows: you place one or more files in the linked folder on your hard disk.

Each time RetSoft Archive is started, or when you right click on the inbox in RetSoft Archive, your inbox is checked for new files which will be imported automatically.


Most file formats are supported, such as scanned documents in TIFF or JPEG format, but also office documents, text files, PDF's and many more.

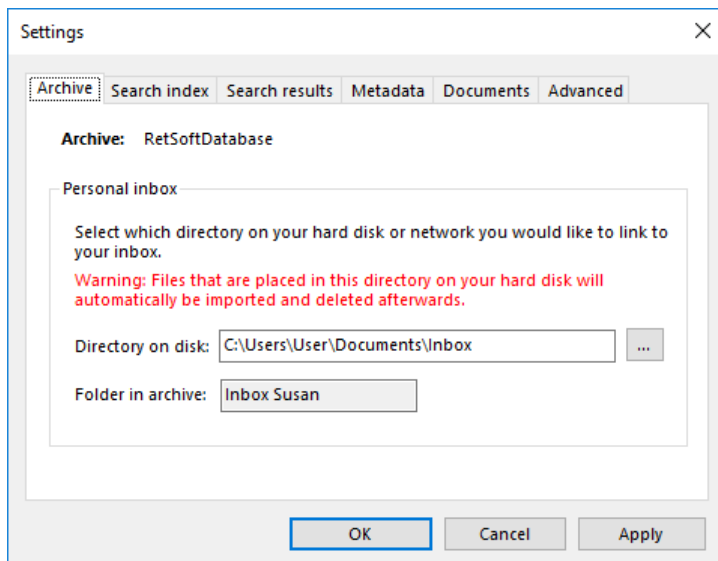
This feature is also very useful when you use the 'Save as...' option from other software programs, or use a so-called multifunctional or network scanners that save documents to the linked folder on your hard disk or server.

It is important to remember that you cannot rename, delete or move the inbox.

Setting up an inbox

Business

An inbox can be setup from the settings (kb/135) (button (kb/147#149) ) window, using the first tab 'Archive (kb/135)'.

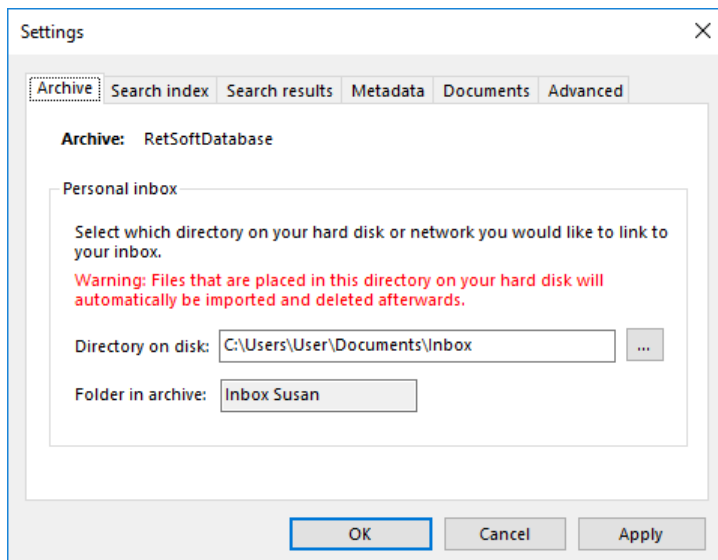


Simply select a folder on your PC and select OK, the folder on your PC will then be linked to the inbox.

Business+

Users will automatically be assigned an inbox folder in RetSoft Archive.

However the users will have to link it to a folder inside Microsoft Windows first by using the settings (kb/135) (button (kb/147#149) ) window, using the first tab 'Archive (kb/135)'.



Simply select a folder on your PC and select OK, the folder on your PC will then be linked to the inbox.

Or the administrator can link the inbox for the user using the RetSoft Admin (kb/188#194).

Importing files

When placing files in an inbox, the corresponding folder in RetSoft will blink with an arrow icon to notify new items have been found.

After selecting the inbox the user will be prompted if they want to import the new files, select Yes to import the files.

By right clicking on the inbox folder in the tree you can also manually check your inbox for new files with the option 'Check inbox'. Files will be automatically imported.

Almost all files are supported, but a few types such as system files are not.

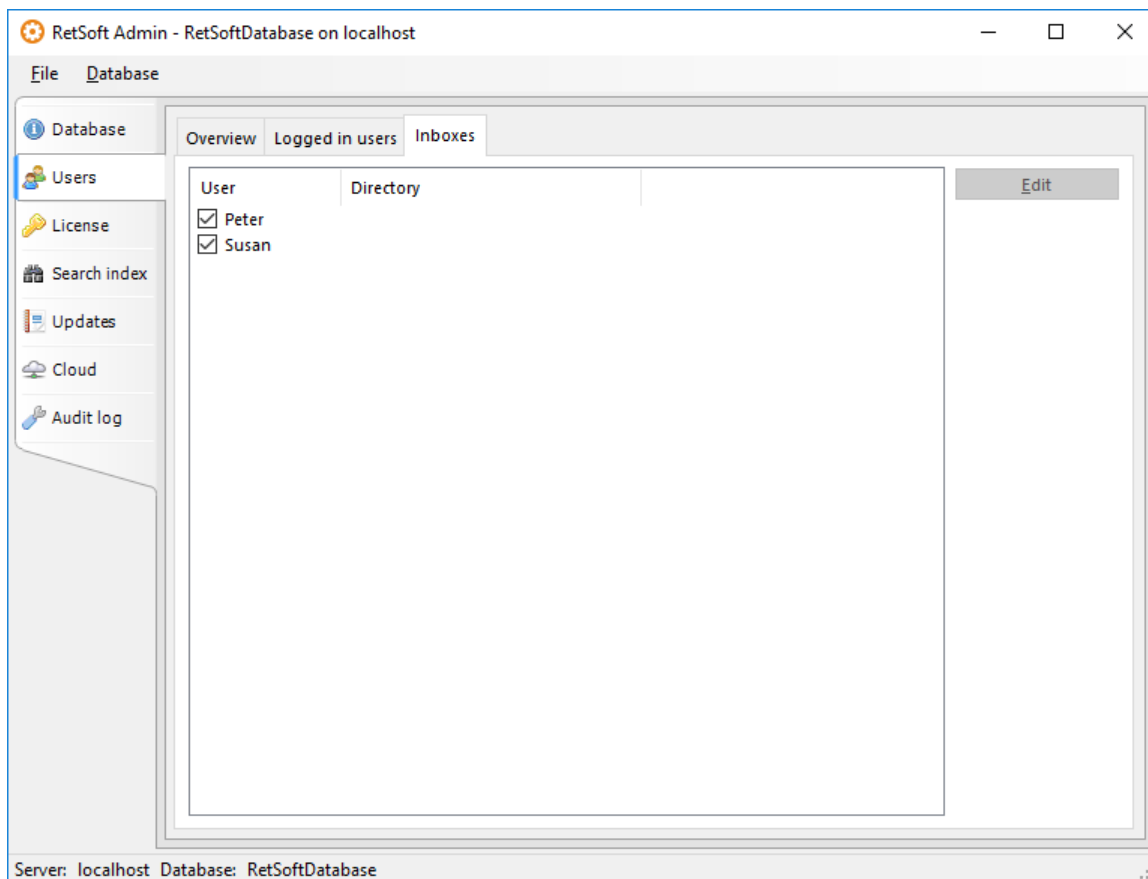
Unsupported files are left in the inbox folder on your hard disk. You should manually move or delete these files.

Disabling the inbox

Disabling an inbox will turn the corresponding RetSoft Archive folder into a regular folder.

An inbox can be disabled by using RetSoft Admin (kb/188#194).

Log in and go to the tab 'Users', then select the subgroup 'Inboxes'.




Here you can disable an inbox by unchecking the inbox for the user.

You can also simply unlink the inbox by removing the path.

Processing rules

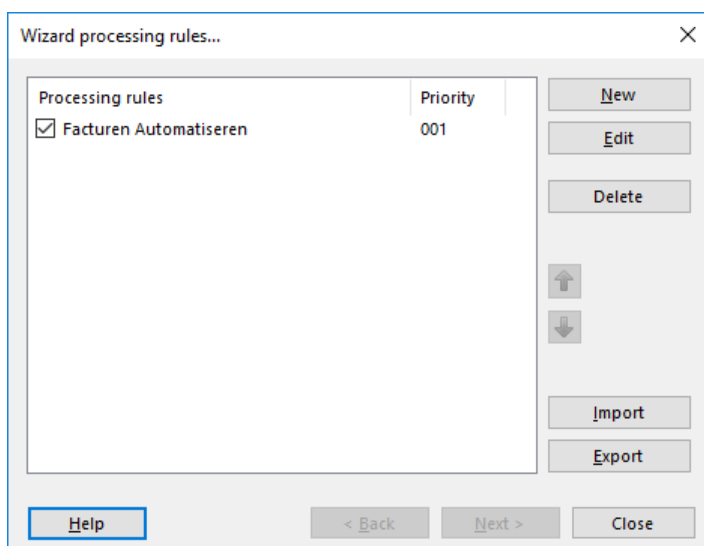
A processing rule defines an action that is executed when an imported or scanned document matches the conditions you specify.

You can use the 'Wizard processing rules' to configure your processing rules.

You can start the wizard from the toolbar button (kb/147#149)  or the menu 'Extra' in RetSoft Archive when an Inbox is selected.

You can then edit, add, disable or remove processing rules.

This will open the following screen:

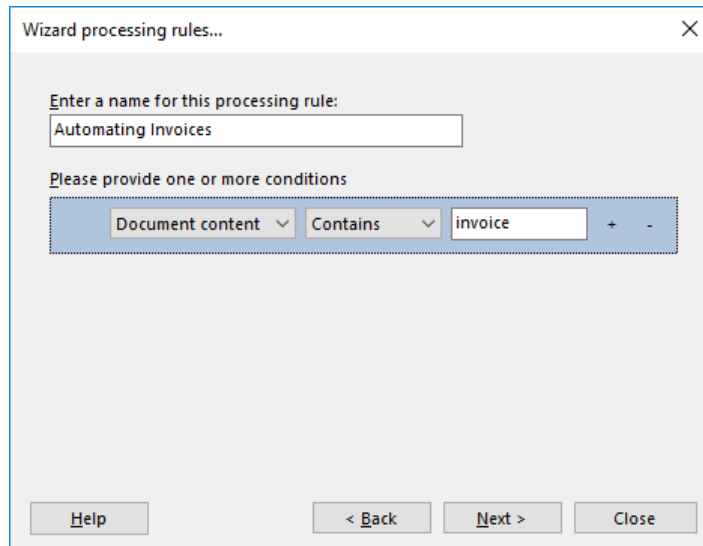


When you have one or more processing rules you can choose to edit or delete them.
It is also possible to rearrange processing rules by moving them up or down in the list, this will specify the order in which they are executed.

It is possible to backup your processing rules using the 'Export' option so you can 'Import' them again later when needed.

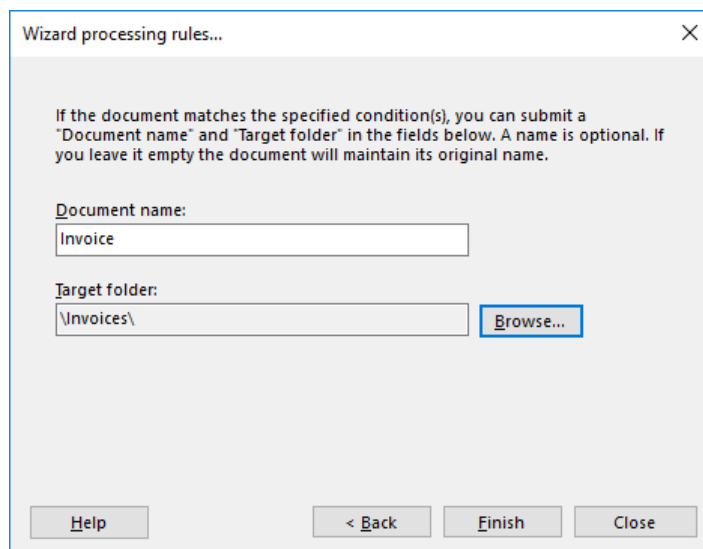
Applying processing rules

Selecting 'New' will allow you to create a processing rule in the following screen:



The screenshot shows a dialog box titled "Wizard processing rules...". It has a close button (X) in the top right corner. The main area contains two sections. The first section is labeled "Enter a name for this processing rule:" and has a text input field containing "Automating Invoices". The second section is labeled "Please provide one or more conditions" and contains a list of conditions. The first condition is "Document content" (selected from a dropdown), followed by "Contains" (selected from a dropdown), and then a text input field containing "invoice". There are "+" and "-" buttons to the right of the text input field. At the bottom of the dialog box, there are four buttons: "Help", "< Back", "Next >", and "Close".

Here you can enter a name for your processing rule, and add conditions.
You can combine the conditions 'Document content' or 'Document name' with the conditions 'Contains' or 'Does not contain' followed by the word or string you want to apply these conditions to.
You can add more conditions to one processing rule by pressing the '+' button.
Note: Selecting 'Edit' will allow you to edit the processing rules using the same screen.
By selecting Next you will get the following screen:




The screenshot shows the same dialog box titled "Wizard processing rules...". The main area contains a paragraph of text: "If the document matches the specified condition(s), you can submit a 'Document name' and 'Target folder' in the fields below. A name is optional. If you leave it empty the document will maintain its original name." Below this text are two text input fields. The first is labeled "Document name:" and contains "Invoice". The second is labeled "Target folder:" and contains "\\Invoices\\". To the right of the "Target folder:" field is a "Browse..." button. At the bottom of the dialog box, there are four buttons: "Help", "< Back", "Finish", and "Close".

Here you can specify a name that documents matching this condition will be renamed to, and a folder in which to put the matched documents.

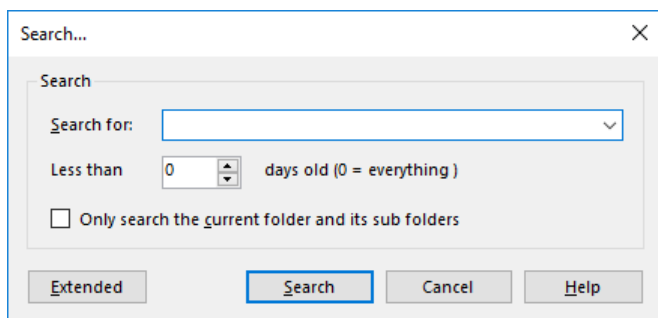
Selecting Finish will add the processing rule to your processing rules list.

Searching the archive

Click on the 'Search'  button (kb/147#149) (or use the shortcut (kb/147#152) Ctrl+F) to search for documents and folders.

Simple search

By default, the following window will appear:



- RetSoft Archive will search for documents and folders that match all of the words you have submitted in the 'Search for' field. Each submitted word must match at least part of one of the document's properties or content.
- If you enter more than one word, RetSoft Archive will search by an 'and-and' way. This means that it will return all folders and documents that contain all of the submitted words in at least one of their properties or content.
- If you want to search for a sequence of words such as a firstname/lastname combination you can do so by surround them in quotes. If, for example, you enter "John Smith" RetSoft Archive will search for all documents and folders which have one or more properties containing the text John Smith.
- It is also possible to search for folders and documents which must match given words but must not match other words (or a sequence of words). If a certain word or phrase is not allowed to occur, it has to be prefixed with a minus sign (-). Words or phrases that must occur can optionally be prefixed with a plus sign (+). Phrases have to be enclosed between quotes. If you would for example submit +birthday -"John Smith", RetSoft Archive will return all documents (and folders) that contain birthday but not John Smith.
- Searching is case insensitive.
- All words (longer than three characters) that are found in the content of a PDF's or RetSoft-documents (kb/170#113) will be yellow highlighted.*
- In order to speed up the search, the maximum number of results has been limited to 100. If you would like your search to return an unlimited number of results, click on the 'Advanced' button to start an advanced search.

* In order to highlight all words that are found by RetSoft Archive, it is important to apply text recognition (OCR) to the documents first.

When the search results are not highlighted, this may be because text recognition has not yet been applied.

Also, make sure that the 'Highlight search results' option available at the Settings window has not been unchecked.

Advanced search

Click on the 'Extended' button inside the simple search window to start an advanced search.

Note that the description of most of the fields that describe a document can be modified at the settings (kb/135) window. This means that the names of the fields referenced below might be different.

Extended search [X]

Metadata ☒

Name:

Word 1:

Word 2:

Word 3:

Word 4:

Word 5:

Zip code:

Date / Expiration date ☒

Date: 26- 3-2018 until: 27- 3-2018

Expiration date: Not applicable 28- 3-2018

Notes / memos ☒

Content ☒

Find documents by their contents.

Barcode (number):

Options ☒

Maximum number of results: 0 (0 = unlimited)

☐ Only search for folders

☐ The (folder) name has to be an exact match

☐ Only search the current folder and its sub folders

☐ Include excluded folders and documents in search results

As for a 'Simple search', an advanced searching goes by the 'and-and' way.

In this case this means that when you have added a document with a single key word 'apple' (no other key words set), you will NOT find the document if you type 'apple' at the 'Word 1' field and 'banana' at the 'Word 2' field.

The only documents that will be returned by the search are the ones that have both 'banana' and 'apple' set as key words.

Search fields

All search fields are 'optional'. This means that when you leave them empty (or unchanged), they will be ignored during the search.

- **Metadata**
 - The 'Name' field can be used to search for documents or folders with a specific name. Enter (part of) the name to search by name. You can also select one of the predefined names from the drop-down list.
 - A document can contain up to five different key words. The optional fields 'Word 1' through 'Word 5' can be used to search for documents with specific key word properties. Note: The order in which the words are submitted does not matter. Each of the 'Word' fields will try to match each of the five key words of the documents.
 - Use the 'Zip code' field to search for documents with a specific zip-code.
- **Date / Expiration date (kb/170#211)**
 - RetSoft Archive sets the default dates between the date of the 'oldest' and the 'newest' document in the archive. Change these dates in order to narrow your search by date.
 - You can also search for files that will expire by a certain date.
 - Not applicable: the expiration date will be ignored during the search.
 - Expired after: search for documents that have an expiration date, but are not yet expired.
 - Expired on: search for documents that expire on the specified date.
 - Expired before: search for documents that are already expired.
- **Notes / memos**
 - Use the 'Notes/Memos' field to include notes/memos in the search process.
- **Content**
 - If you are using the OCR Add-on (kb/159), you can search for text through the contents of the documents. To do so enter one or more words to search for in the 'Contents' field.
 - There are documents that contain a barcode. If you wish to search for a barcode, you can enter (a part of) it in the 'Barcode number' field. Currently only available in measure made solutions.
- **Options**
 - 'Maximum number of results' - Limit the maximum amount of search results. This option can speed up an unspecified search. Leave 0 for no maximum.

- 'Only search for folders' - By checking this option only folders will be returned during the search.
- 'The (folder) name must be exact' - If this option is checked, documents/folders must exactly match the submitted 'Name'.
- 'Only search the current and its sub folders' - If this option is checked all documents and folders that are located in the currently selected folder will be included in the search.
- 'Include folders that have been excluded from search results' – If this option is checked folders and documents that have been excluded from search results will be shown in the search results as well.

Search results

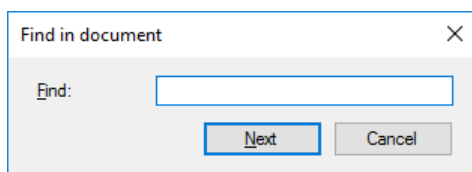
- The results will be displayed in the search results tab on the main screen. You can safely switch between 'Search results' and 'Documents', the search results will be preserved until you have executed a new search or have loaded another archive.
- On the 'Settings' window, there is an option available called "Yellow highlight search criteria in content". When this option is checked, search criteria longer than three characters, which is found in the content of PDF's and RetSoft-documents (kb/170#113) will be yellow highlighted. **ATTENTION:** In order to highlight words, documents need to be processed by OCR text recognition.
- When you open a document or folder from the Search results window, this document or folder changes color to indicate that it was viewed (opened).
- To change the advanced search window back to the simple search window, use the 'Simple' button.

Searching in a document

If you want to search for a specific word or phrase inside an open PDF or RetSoft-documents (kb/170#113), you can use the option 'Search in document' to do so.

If you right-click on the graphical document, a popup menu will appear. This menu contains an option called 'Find in document'. You can also use the shortcut (kb/147#152) keys 'Ctrl+G'.

The following window will appear:



Submit your word or phrase in the 'Search for'-field. Next, press the 'Enter' key or click 'Next'.

Repeat this for all instances of the given text inside the document. The results will be highlighted in blue.

Using wildcards

RetSoft Archive supports the use of wildcards when searching, '%' and '_' can be used as wildcards .

The '%' stands for any number of any kind of characters. For example, you want to find all the documents which names end with receipt. In the "Name" search field enter: %receipt

The '_' stands for any single character. For example, you are trying to find all the documents which names contain the codes 1224a through 1224z. In the "Name" search field you would enter: 1224_.

Excluding folders

You can right click a folder and select 'Exclude from search results' to exclude it from search results or set this setting inside a folder's properties (kb/91#112), all folders inside will also be excluded.

Archiving efficiently

Get the most out of RetSoft Archive by minding the following aspects.

Configuration

Make sure you have an up to date hardware configuration.

Note: A fast scanner only works fast on a fast system.

Business

When scanning (kb/91#96) more than 25 documents each day on average, we advise a scanner that has an ADF (Automatic Document Feeder).

All documents can be scanned in just a single batch. After the session has complete, you can place the scanned documents into appropriate folders.

RetSoft Archive 'Pro' or 'Business' supports archives up to 200.000 documents. Also, the archive should not exceed the size of 3GB. If you have reached one of these limits, or searches (kb/104) tend to get slow, you can either split the archive (kb/91#93) into two or more archives, or upgrade.

If you want to modify the archive with more than one workstation simultaneously, you can upgrade to RetSoft Archive 'Expert' or 'Business+'.

This version allows you to set restrictions to the archive, add documents and make modifications from multiple workstations and store up to millions of documents.

Click here (<http://retsoft.com/subscriptions/plans-and-pricing>) for a list of differences between RetSoft Archive 'Pro' or 'Business' and 'Expert' or 'Business+'.

System requirements

Business

Minimum configuration: Windows PC running 7/8/8.1/10

Required: a TWAIN-compatible scanner.

We recommend using a system that fits the requirements of the windows version you are running.

Business+

System requirements client: 1800 MHz processor, 256 MB RAM, USB 2.0/SCSI TWAIN compatible scanner (a selection can be found at our website (www.retsoft.com)).

Configuration server: The system requirements of the server depend mostly on system requirements of the database system (MS SQL Server / MySQL) combined with the size of the archive and search indices.

We usually advice a scalable server system which is easy to upgrade over time, while the archive grows.

Scanners

RetSoft Archive can directly operate scanners that come with a TWAIN-driver.

Other types of scanners, such as network scanners and copiers, are also supported as long as that can store documents as PDF or TIFF files onto an inbox (kb/129).

Updates

Make sure you always have the latest version of RetSoft Archive. by checking the customer portal.

Working in the cloud

RetSoft Archive offers you the opportunity to share folders in the cloud.

This service is offered free for a capacity of 50MB for 'Pro' or 'Business' users or 250 MB per licensee for 'Expert' or 'Business+' users. More storage is available for an annual fee here (<http://retsoft.com/subscriptions/plans-and-pricing>).

The cloud feature is designed so that you can decide by yourself which parts of the archive are (temporarily) shared in the cloud.

Useful if you need to access parts of the archive through the Internet. They can be retrieved using a web browser, tablet or smartphone (Apple and Android).

The cloud feature is only intended for viewing purposes (just like the Viewer of RetSoft Archive).

Business/Pro

Setting up the cloud

Setting up the cloud is done via the settings (button (kb/147#149)  window in the tab 'Cloud'.

You can select up to a maximum of one archive from which you can share folders in the cloud. It will be listed under 'Archives in the cloud'.

Use the 'Delete' button to remove the archive from the cloud so you can share folders from another archive in the cloud.

Assigning cloud users

You can set your email address which doubles as your login username in the same screen where you set your archive.

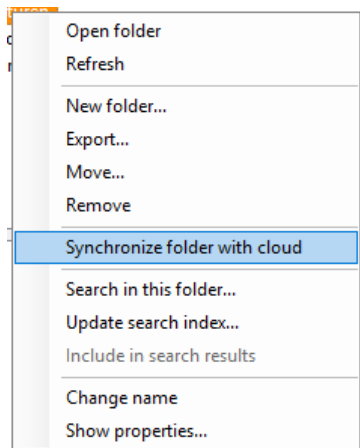
Upon setting your email address you will receive an email with more information on how to access the cloud.

You can add more than one user with access to your cloud, this can be useful to share files.

Putting folders in the cloud

Select the folder you want to share in the cloud using the right mouse button. Then select the menu option 'Upload to cloud'.

Note: This functionality only works on the main folders in the archive.



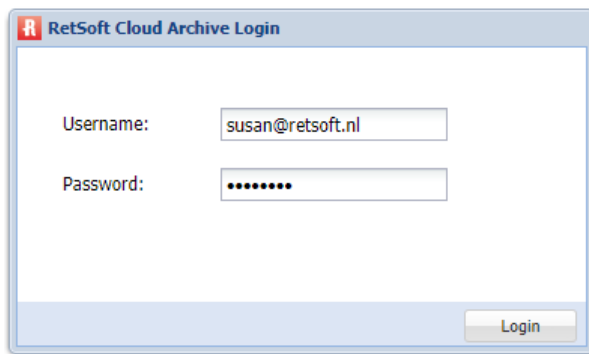
After synchronization is done, the selected folder will be available in the cloud, including all the subfolders.

The color of the folders (and sub folders) which are shared into the cloud changes to blue and the folders get a cloud indication.

Logging in

The user now receives in his own email box (via the email address) an email with a password to login to the cloud through <https://cloud.retsoft.nl/> (<https://cloud.retsoft.nl/>).

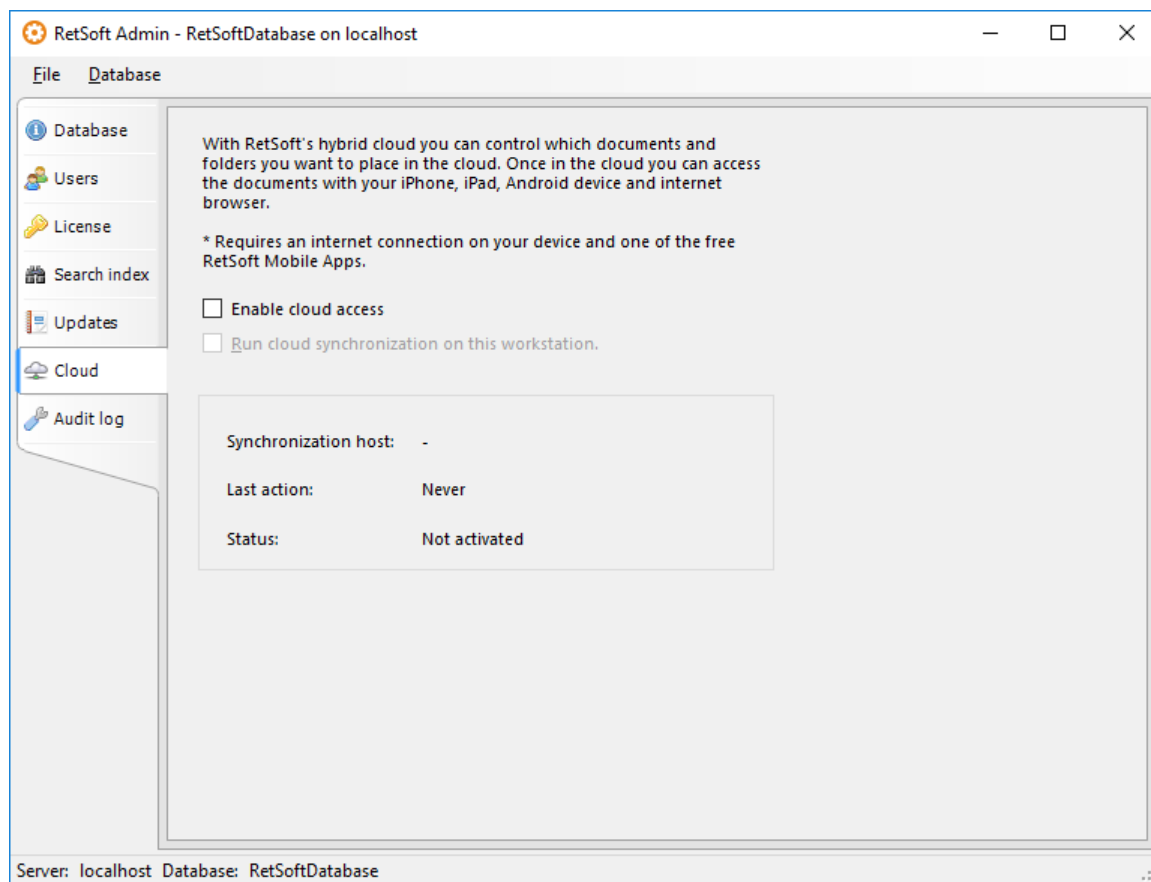
The user has direct access to all folders which are shared into the cloud.



Business+/Expert

Setting up the cloud

To enable the cloud you use 'RetSoft Admin (kb/188#194)' and navigate to the tab 'Cloud'.



You can enable cloud access from here, for more information refer here (kb/188#194).

Assigning cloud users

You can assign cloud users through 'RetSoft Admin (kb/188#194)'.

Here you can set which users gain access to the cloud, they will use their email address for this.

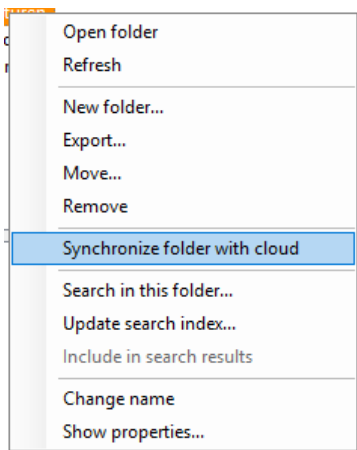
Once you allow a user to use the cloud they will receive an email with more information on how to access the cloud.

Putting folders in the cloud

If you have Administrator rights in RetSoft Archive, you can share folders into the cloud.

Select the folder you want to share in the cloud using the right mouse button. Then select the menu option 'Upload to cloud'.

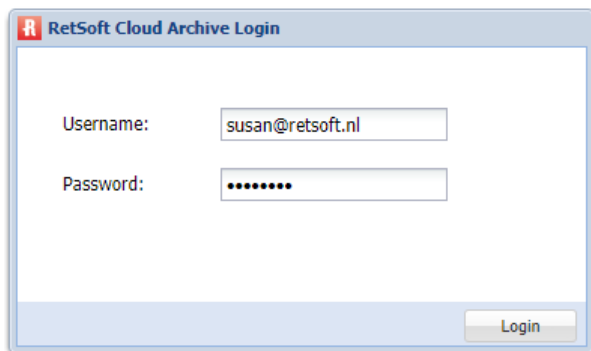
Note: This functionality only works on the main folders in the archive.



After synchronization is done, the selected folder will be available in the cloud, including all the subfolders. The color of the folders (and sub folders) which are shared into the cloud changes to blue and the folders get a cloud indication.

Logging in

Users who gain access to the cloud through 'RetSoft Admin (kb/188#194)' can login directly into the cloud with their own email address and password via <https://cloud.retsoft.nl/> (<https://cloud.retsoft.nl/>). Users only have access to the folders they also can access in RetSoft Archive.



Removing folders from the cloud

Select the folder you want to remove from the cloud by clicking on it with the right mouse button. From the menu that appears, choose 'Remove from cloud'.

Is my data safely stored?

RetSoft uses the services from Amazon, one of the largest providers of cloud storage in the world. Your data is sent encrypted to the servers of Amazon. We recommend that you always check whether the data you upload to the cloud contains privacy-sensitive information. No matter how safe everything is stored and secured, you are always responsible for what you share in the cloud.

Text recognition: OCR Add-on

Finding documents by their contents using the OCR (Optical Character Recognition) module for RetSoft Archive. The OCR module provides a way to make the entire text of scanned documents searchable (kb/104).


The OCR module

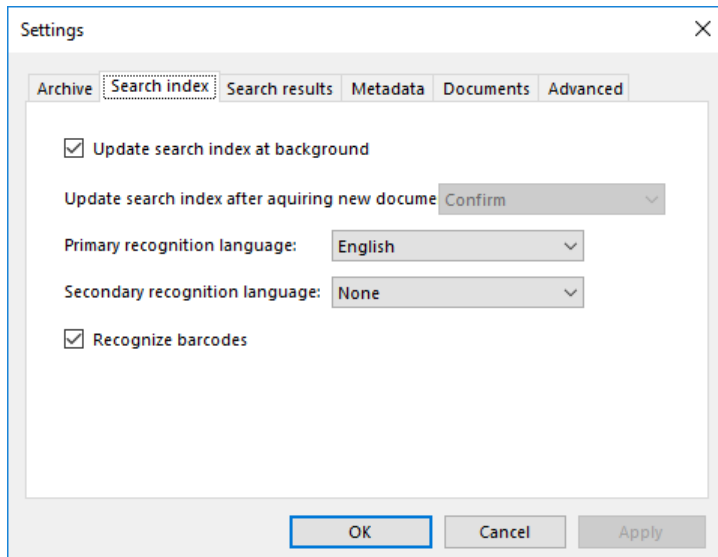
With the the OCR Add-on in use, searching is greatly simplified. Since scanned documents are like photos to a computer, their contents can for instance not be copied or edited with a text editor normally. With use of OCR, the contents of a scanned document can be recognized (refer to 'Manual OCR' or 'Automatic OCR' for more information). Scanned as well as imported MS Word, MS Excel, PDF, HTML and other documents will be made searchable by their contents. With this module you can:

- Make RetSoft automatically recognize every scanned page.
- Select text within a document and convert it into editable text.
- Find back documents by simply searching for a word that occurs in their contents.

Visit our (website|) for more information on this module and how to order it.

OCR Settings

From the settings window (select  in the main screen) you can change your OCR settings. Select the tab 'Text recognition' in the screen that appears. The following settings will appear:



Recognition Languages

'Primary and Secondary language' - The languages used to recognize text in documents. You can submit a primary and secondary language. Several languages are available for this functionality.

After installing the languages Dutch and English will be provided, but more languages can be added. Contact RetSoft for this.

Options

'Apply text recognition (OCR) after a scan session' - Three choices are available for this option.


- 'Always' - Text recognition will always be executed after a page has been scanned without prompting the user.
- 'Never' - Text recognition will not be applied to the scanned pages
- 'Prompt' - RetSoft Archive will ask the user after every scan whether text recognition should be applied to the document or not.

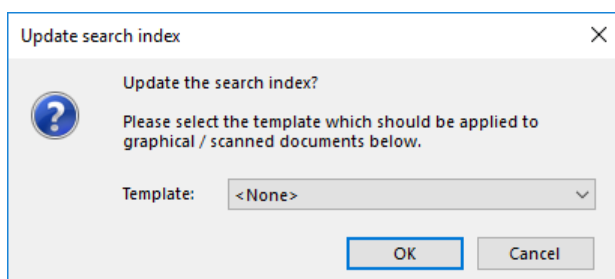
'Display result after OCR is processed' - If marked, the recognized text is displayed after OCR text recognition has completed. Note: this only works when a single document has been processed.

'Remember last used OCR template' - Remembers the last used OCR template after a scan session. Disabled by default.

Manual OCR

Manual OCR can be initiated in the following ways:

1. Using the button (kb/147#152) 'Text recognition'  in the main window
2. Using the shortcut (kb/147#149) Ctrl+O.
3. By selecting 'Text recognition' from the 'Options' menu in the main window.
4. Through the different popup menus that appear when the right mouse button is pressed at one of the different locations in the main window.




Text recognition can be applied to a single document, to multiple documents or to a selection made within a document. When text recognition has been applied to a document, the result will be attached to the respective document. Using text recognition allows the user to search documents by their contents. It is possible to save the results in a file and also to display the results after each text recognition process. The results will only be shown when the option 'Display result after OCR is processed' on the OCR settings window has been checked.

OCR Templates are templates that define areas on a document where RetSoft Archive should apply the text recognition.

When viewing the properties of a document, you can find if it has been processed under the tab 'Text recognition', this will tell you if it's searchable by contents.

Making the entire archive searchable.

To make an archive completely searchable by contents select the main (first) folder in the folder view. Then select 'Text recognition'  in the main screen.

Select OK to start the OCR process.

This may take some time depending on the amount of unprocessed documents.

Tip: Start this process when you are not going to be needing the computer it is running on for a while.

Automatic OCR

Automatic OCR means that text recognition is applied to the documents immediately after the scan session completes. The window which appears is slightly different from 'Manual OCR' (see image).

A template can be selected or one can choose not to apply OCR.

If you choose to set your choice as default, it can be changed in the 'Settings' window at a later time. To do this, check the option 'Prompt' on the 'Text recognition' tab.

Use recognized text as name

This option creates the possibility to use the recognized text from a RetSoft-document as the new name of a document. First you create a selection in the document.

This is done by holding down the left mouse button while pulling a rectangle on the document.

After this, right click on the selection you have just made and choose 'Selection', followed by 'Use selection as document name'.

TIP: If you hold down 'Ctrl + Alt' while creating the selection, the 'Use recognized text as name' option is instantly activated.

OCR Templates

OCR Templates filter out sections of documents which do not have to be processed by the OCR engine and therefore speed up the text recognition process.

The use of templates is especially useful when scanning a lot of documents with the same layout, or documents that only have a small portion of relevant text.

More information about this extension of the OCR Add-on is available at our website (<http://www.retsoft.com>) and in the module's chapter.

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Only Dutch law applies to this Agreement.

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Internet: www.retsoft.nl

Email: kcc@retsoft.nl

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RetSoft Archive Business/Pro

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YOU MAY

1. Install one 'Pro' or 'Business' version of RetSoft Archive on one computer. This will be the computer on which the archive is maintained and viewed.
2. The 'Viewer' version of RetSoft Archive may be installed on a maximum of five different computers, all installed on the same local area network.
3. Make one copy of the Software in machine readable form solely for backup purposes provided you reproduce RetSoft BV's copyright notice.

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RetSoft Archive Business+/Expert

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YOU MAY

1. Install one 'Expert' or 'Business+' version of RetSoft Archive and its administrative tool on one computer and connect to one Microsoft SQL Server or MySQL database.
2. Install additional copies of RetSoft Archive 'Expert' or 'Business+' in the same network as the first copy. Activate the amount of user licenses you have purchased with use of the administrative tool of RetSoft Archive 'Expert' or 'Business+'.
3. Connect to the RetSoft Archive database from the internet with use of the RetSoft Archive Webplugin.
4. Make one backup copy of the Software in machine readable form solely for backup purposes provided you reproduce RetSoft BV's copyright notice.

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If one main license of RetSoft Archive Expert is being used in more than one LAN (Local Area Network) an extranet or WAN (Wide Area Network) additional conditions apply. If this is the case please contact RetSoft for more information.

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Saved documents can contain sensitive information, which should not be seen by some individuals. Therefore, be careful with your scanned materials/archive. Make a regular backup and store it somewhere safe..

All our proposals and agreements are following the guidelines of ICT-Office, deposited on 14 Januari 2009 at the Chamber of Commerce district midden Nederland ('Middle-Netherlands') under number 30174840.

RetSoft Admin

There is no database created when RetSoft Archive 'Expert' or 'Business+' is being installed. You can find more information under 'Software installation (kb/88#176)'

In order for RetSoft to work with your database server you need to first create a superuser named 'scansort' in your selected RDBMS (relational database management system) of choice.

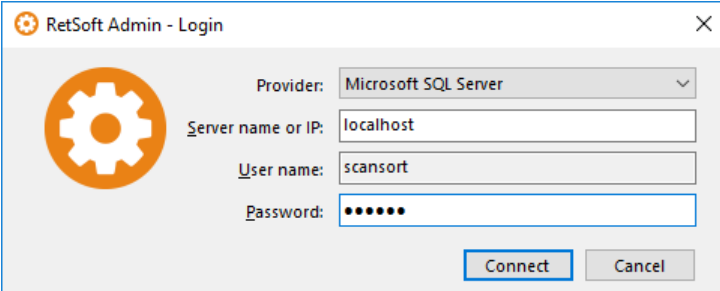
This user needs to have permissions to create, read, update and delete databases.

To create a new RetSoft database you can use 'RetSoft Admin'.

You can find 'RetSoft Admin' at the Windows Start menu under program's: "RetSoft Archive" - "Admin".

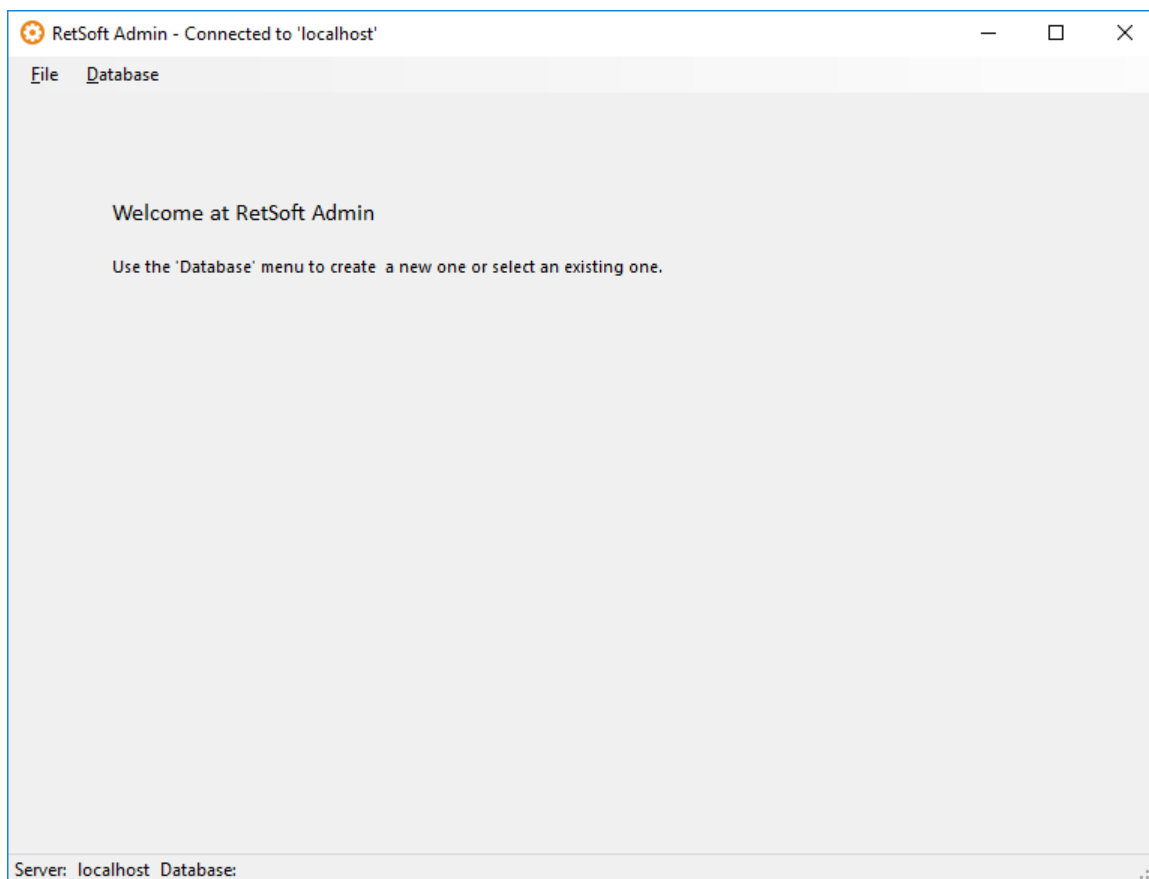
Logging in to RetSoft Archive admin

When you run 'RetSoft Admin' you will see the following login-screen:

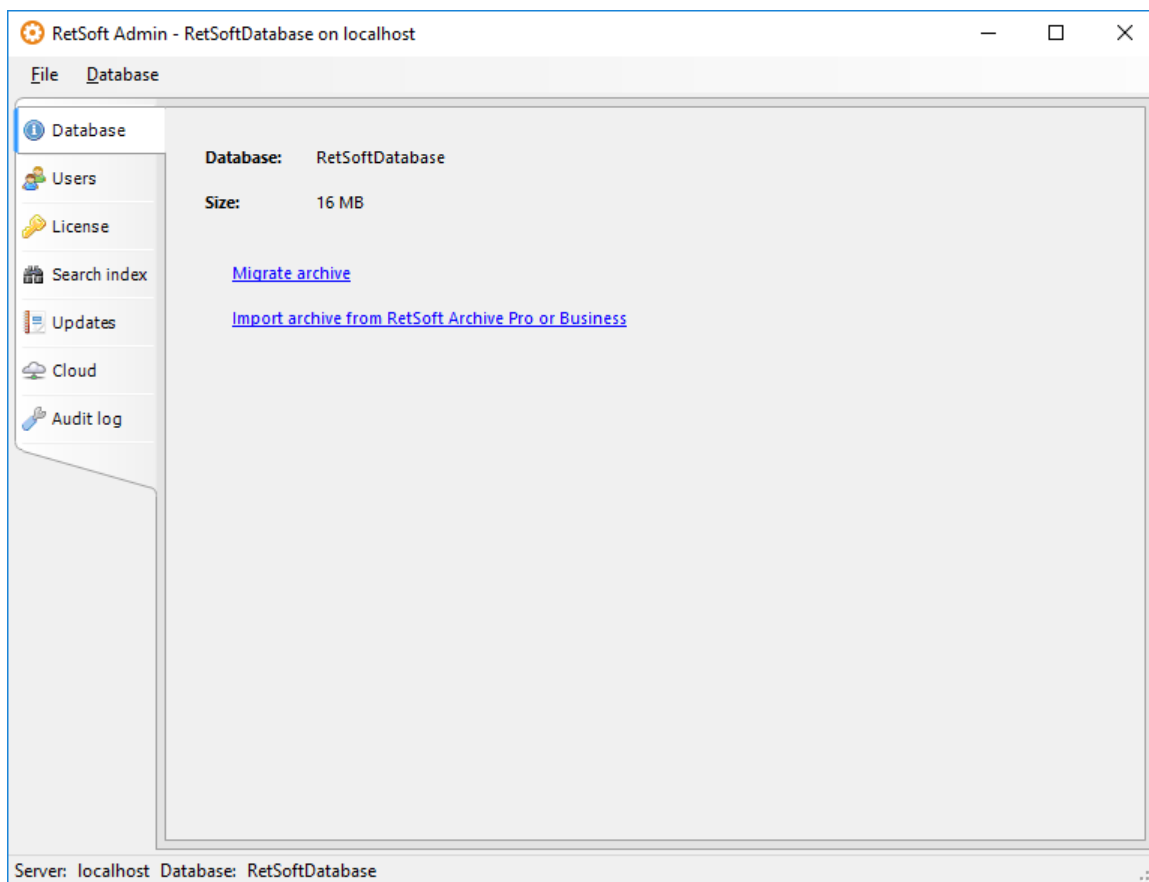


Enter the location of your database server, and the password for the 'scansort' user. This is the superuser you created earlier. Make sure to select if you're connecting to a MySQL or Microsoft SQL server database.

If you have never used RetSoft before or you have not selected a database the following screen will be shown:



If there is already a database connected to RetSoft (and it still exists), the following screen will be shown:



Databases

In case you have never created a RetSoft database before you can create one using 'RetSoft Admin'.

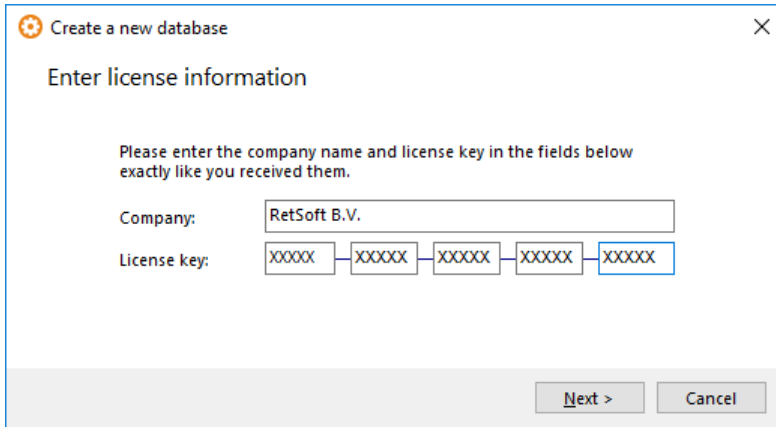
If you have created multiple databases you can switch databases using 'RetSoft Admin' too.

In the event RetSoft has been updated the database might need to be updated too, this can also be done using 'RetSoft Admin'

If you wish to switch between RDBMS you can also use 'RetSoft Admin' to migrate databases between systems.
If you have upgraded from 'RetSoft Archive Pro or Business' to 'RetSoft Archive Expert or Business+' you can import your *.rdb archives into your RDBMS using 'RetSoft Archive Admin'.

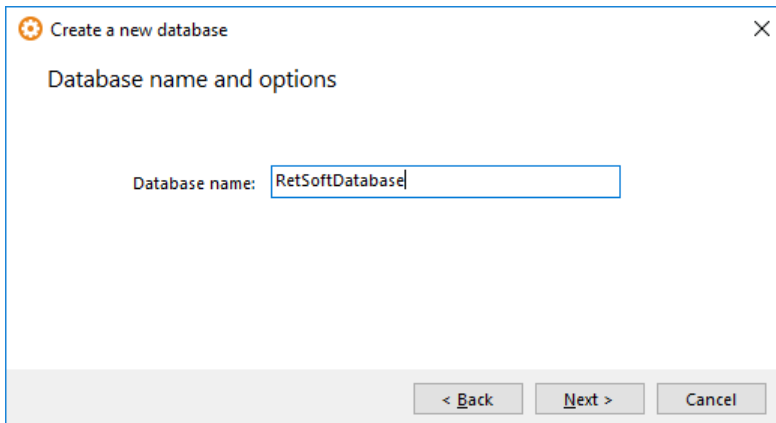
Creating a database

To create a new database, select the 'Database' menu and proceed by selecting 'New database...'
You will be prompted to enter your license information:



The screenshot shows a dialog box titled "Create a new database" with a close button (X) in the top right corner. The main heading is "Enter license information". Below this, a message states: "Please enter the company name and license key in the fields below exactly like you received them." There are two input fields: "Company:" with the text "RetSoft B.V." and "License key:" with five boxes, each containing "XXXXX". At the bottom right, there are two buttons: "Next >" and "Cancel".

Upon correctly entering your license information and selecting 'Next' you will be prompted to enter a name for your new RetSoft database:



The screenshot shows the same dialog box, now at the "Database name and options" step. The "Database name:" field contains the text "RetSoftDatabase". At the bottom, there are three buttons: "< Back", "Next >", and "Cancel".

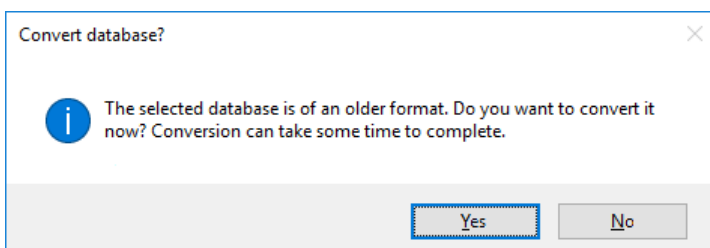
After selecting 'Next' your new database will be created and automatically connected to.
If RetSoft Archive has been running during this process it is recommended to restart RetSoft Archive.
Select 'Close' in the progress screen that appears and you can now start using your newly created database.

Selecting a database

To select a database, select the 'Database' menu and proceed by hovering over 'Select existing'.
'RetSoft Admin' will automatically scan your connected RDBMS for any RetSoft Archive databases which will be listed here.
Simply select your database and 'RetSoft Admin' will automatically connect itself and RetSoft Archive to this database.
If RetSoft Archive has been running during this process it is recommended to restart RetSoft Archive.

Updating a database

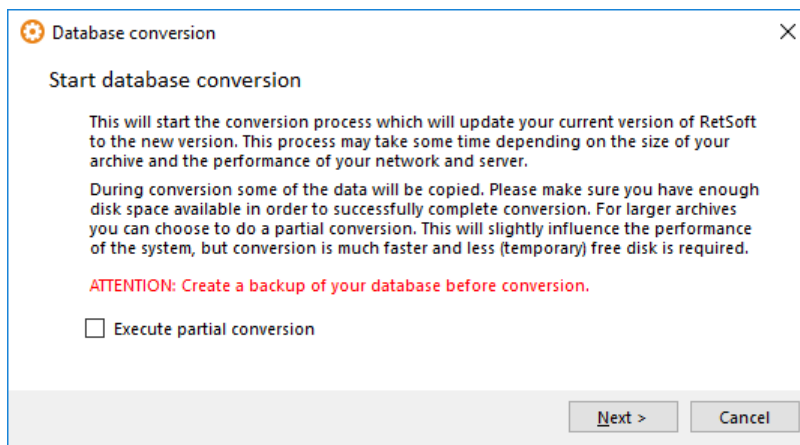
To update a database select an outdated RetSoft Archive database first.
The following screen will automatically show and ask you if you wish to convert your database:



The screenshot shows a dialog box titled "Convert database?" with a close button (X) in the top right corner. It features an information icon (i) and the text: "The selected database is of an older format. Do you want to convert it now? Conversion can take some time to complete." At the bottom, there are two buttons: "Yes" and "No".

Select Yes

The following warning will appear:

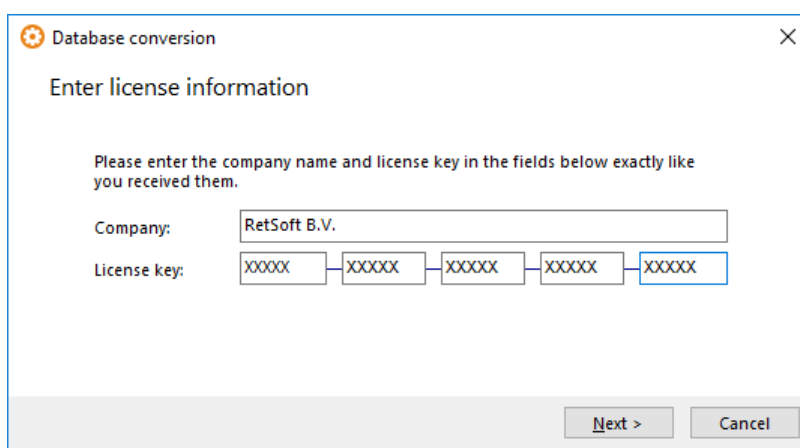


The screenshot shows a dialog box titled "Database conversion" with a close button (X) in the top right corner. The main heading is "Start database conversion". Below it, there is a paragraph of text: "This will start the conversion process which will update your current version of RetSoft to the new version. This process may take some time depending on the size of your archive and the performance of your network and server." followed by another paragraph: "During conversion some of the data will be copied. Please make sure you have enough disk space available in order to successfully complete conversion. For larger archives you can choose to do a partial conversion. This will slightly influence the performance of the system, but conversion is much faster and less (temporary) free disk is required." Below this text, there is a red line of text: "ATTENTION: Create a backup of your database before conversion." At the bottom left, there is a checkbox labeled "Execute partial conversion" which is currently unchecked. At the bottom right, there are two buttons: "Next >" and "Cancel".

ATTENTION: Create a backup of your database before conversion.

If you wish to continue select 'Next'

You will be prompted to enter your license information:



The screenshot shows a dialog box titled "Database conversion" with a close button (X) in the top right corner. The main heading is "Enter license information". Below it, there is a paragraph of text: "Please enter the company name and license key in the fields below exactly like you received them." Below this text, there are two input fields. The first is labeled "Company:" and contains the text "RetSoft B.V.". The second is labeled "License key:" and contains five boxes, each with "XXXXX" inside, separated by hyphens. At the bottom right, there are two buttons: "Next >" and "Cancel".

Upon correctly entering your license information and selecting 'Next' the database will be converted.

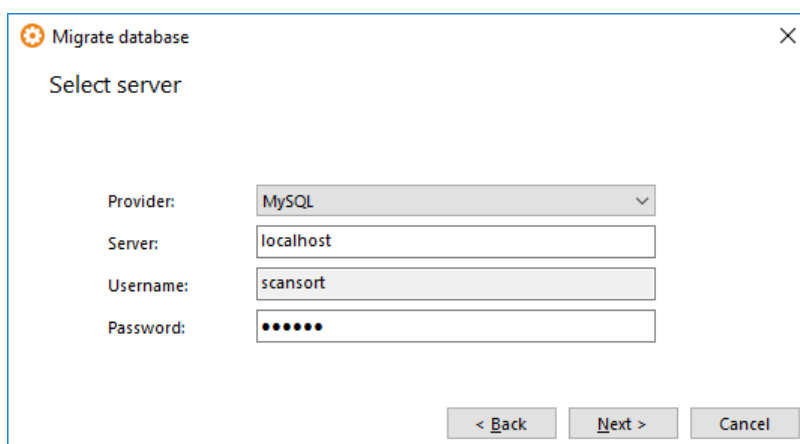
When this process is finished you can select 'Close', you can now use your previously outdated database again.

If RetSoft Archive has been running during this process it is recommended to restart RetSoft Archive.

Migrating a database

To migrate a database select 'Migrate Archive' on the main screen of 'RetSoft Admin', make sure to select the correct database you want to migrate first.

The following screen will appear and prompt you to enter a destination:



The screenshot shows a dialog box titled "Migrate database" with a close button (X) in the top right corner. The main heading is "Select server". Below it, there are four input fields. The first is labeled "Provider:" and has a dropdown menu with "MySQL" selected. The second is labeled "Server:" and contains the text "localhost". The third is labeled "Username:" and contains the text "scansort". The fourth is labeled "Password:" and contains five dots. At the bottom, there are three buttons: "< Back", "Next >", and "Cancel".

ATTENTION: Create a backup of your database before migrating.

You can migrate your database to a different RDBMS if you wish to do so.

Keep in mind that this RDBMS needs to have the superuser 'scansort' configured.

Upon selecting 'Next' the following screen will appear:

Migrate database

Database name and options

Database name:

☐ Migrate users to new database

Default password:

< Back Next > Cancel

When also migrating users a password is used to give nonexistant users access to the target database system. This is required because it is not possible to acquire a users password in the source database system. After conversion these passwords can be reset in 'RetSoft Admin'.

Select 'Next' and 'RetSoft Admin' will start migrating your database, this may take some time.

When the process is finished your new database is created, select 'Close' to return to 'RetSoft Admin'.

You can now either switch to your newly migrated database, or if you have selected a different RDBMS restart 'RetSoft Admin' and connect to this RDBMS to select the newly migrated database.

If RetSoft Archive has been running during this process it is recommended to restart RetSoft Archive.

Importing from Pro or Business

If you have updated from 'Pro' or 'Business' to 'Expert' or 'Business+' you can select the option 'Import archive from RetSoft Archive Pro or Business' on the main screen of 'RetSoft Admin', make sure to select the correct database you want to migrate into first. The following screen will appear and prompt you to select a 'Pro' or 'Business' archive file:

Migrate database

Select archive to import

Database:

Target folder*:

* This is an optional target folder in the destination database where the converted source database will be placed.

< Back Next > Cancel

ATTENTION: Create a backup of your databases before importing.

The selected archive will be imported into the currently selected database.

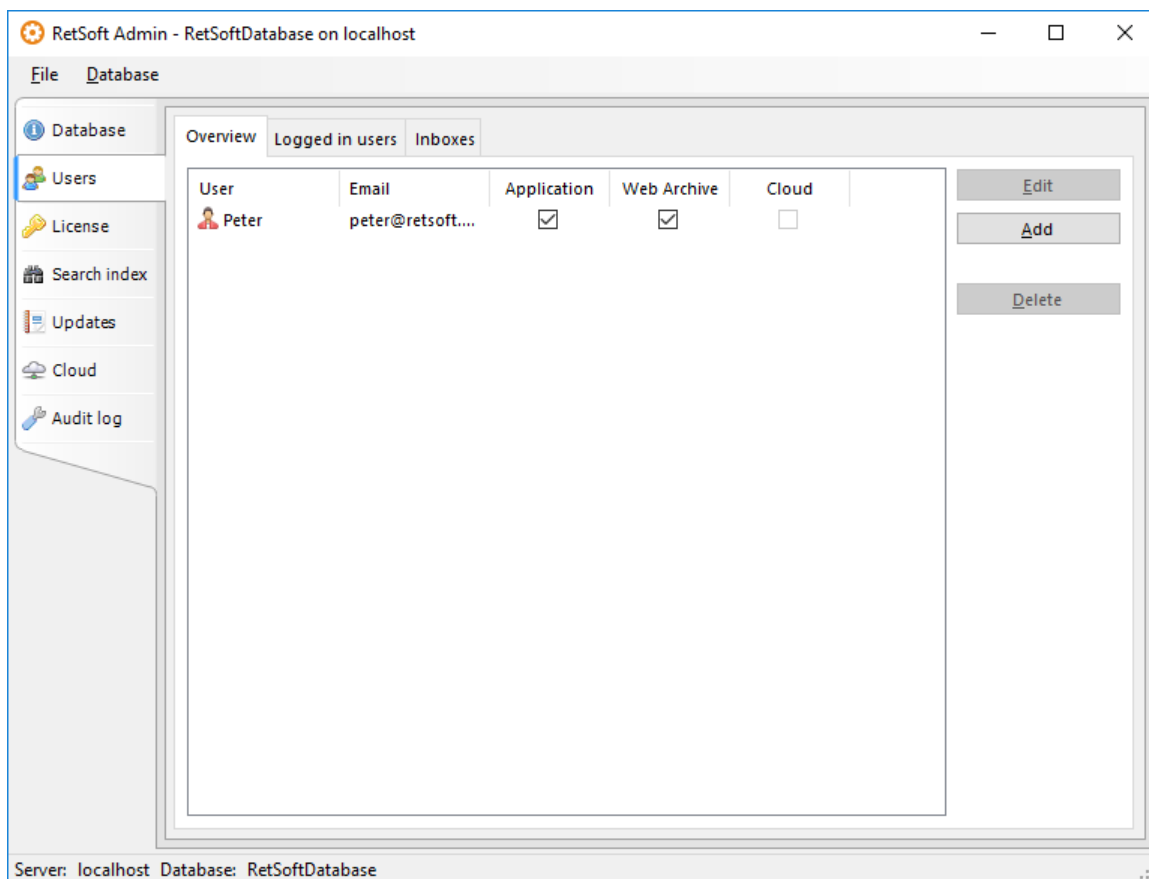
Select 'Next' to start the importing process, this may take some time.

When the process is finished your archive will be imported, select 'Close' to return to 'RetSoft Admin'.

If RetSoft Archive has been running during this process it is recommended to restart RetSoft Archive.

Managing users and groups

By selecting the 'Users' tab you can find an overview of your users:



Here you can add users and usergroups by selecting 'Add', this will show you the following:

A usergroup can simply be added by selecting 'Add' next to 'Group membership'.

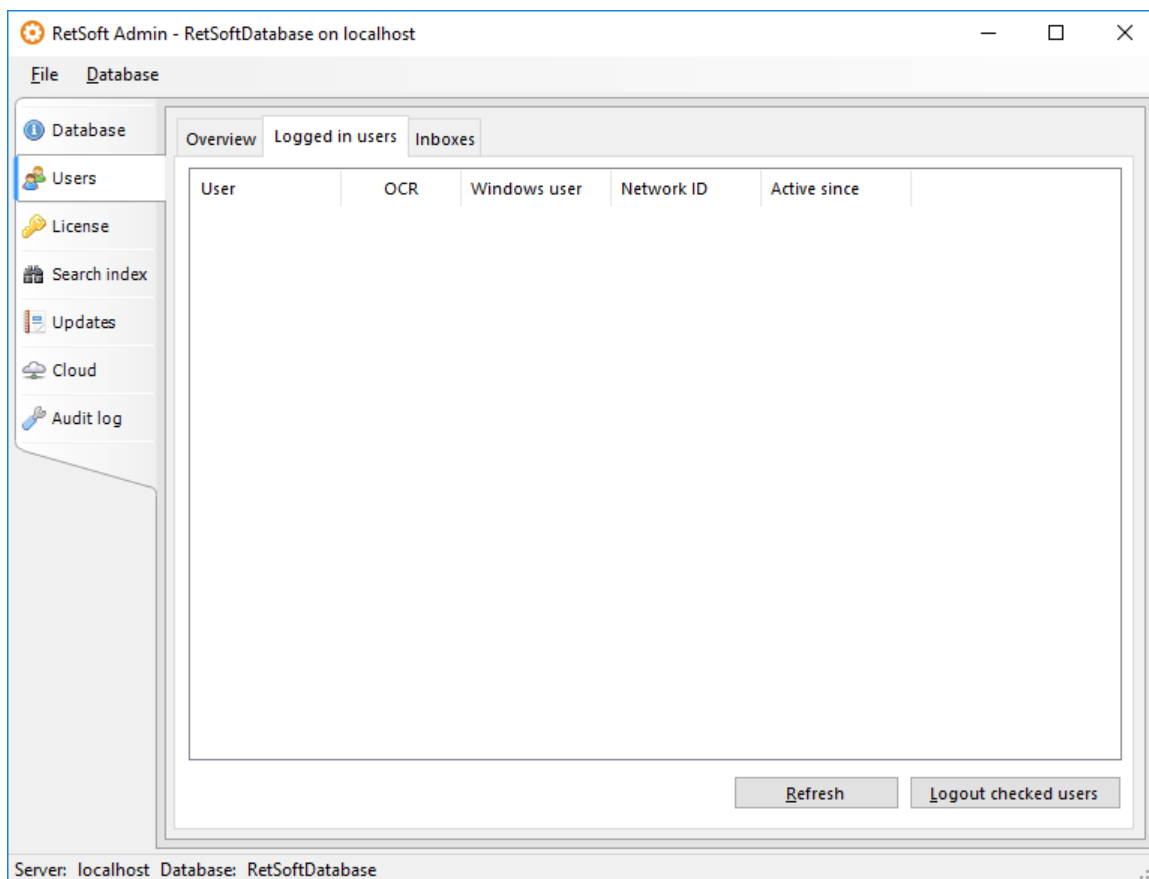
You can enable as much users as your license allows you, users are created with use of the 'RetSoft Admin' application and can become member of one or more groups.

Users in the 'Administrators' group will have all rights within RetSoft Archive, to set group rights refer to the chapter Setting access rights (kb/91#187).

Usergroups allow you to limit access rights to the archive. In addition you can also select if a user is eligible to use Cloud or Webarchive.

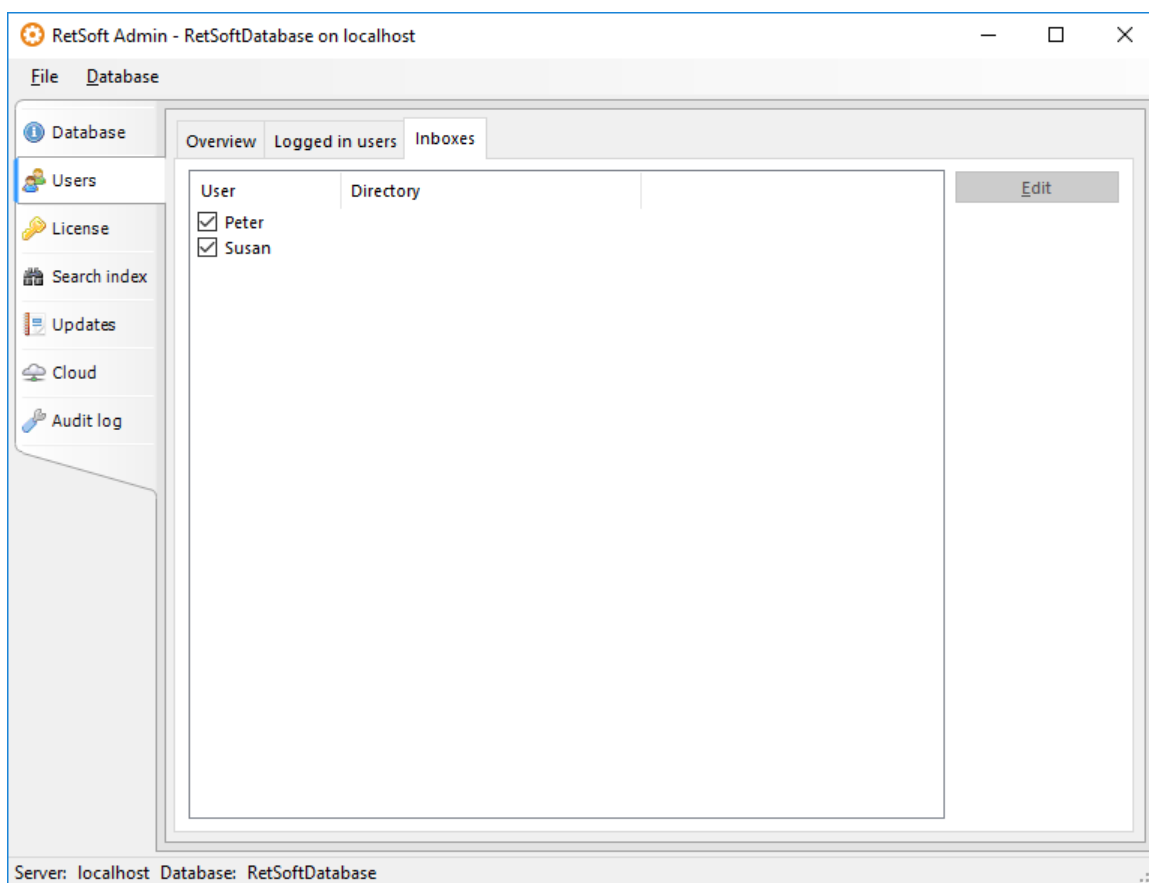
Keep in mind that the email address you enter for a user will be used for the email functionality of Webarchive and as a username for Cloud.

You can disconnect users which are currently active in RetSoft in the subgroup 'Logged in users':

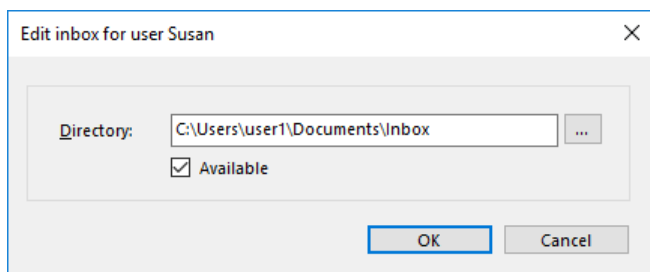


When a user is logged into 'RetSoft Archive' or Webarchive a session will appear here, you can then check the users and disconnect them by selecting 'Logout checked users' if needed.

You can assign an Inbox to a user in the subgroup 'Inboxes':



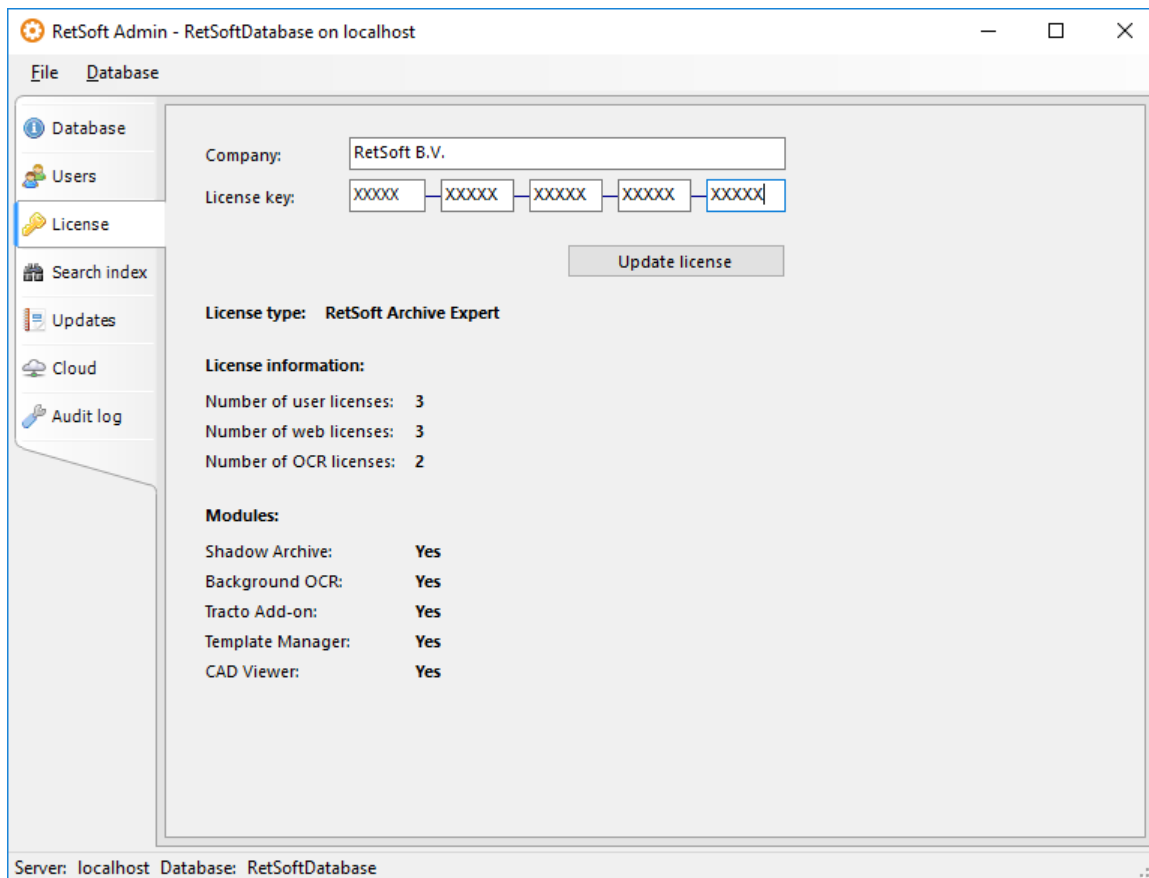
An inbox is assigned to a user by selecting a directory on your PC:



More information on inboxes (kb/129) can be found in it's respective chapter.

License

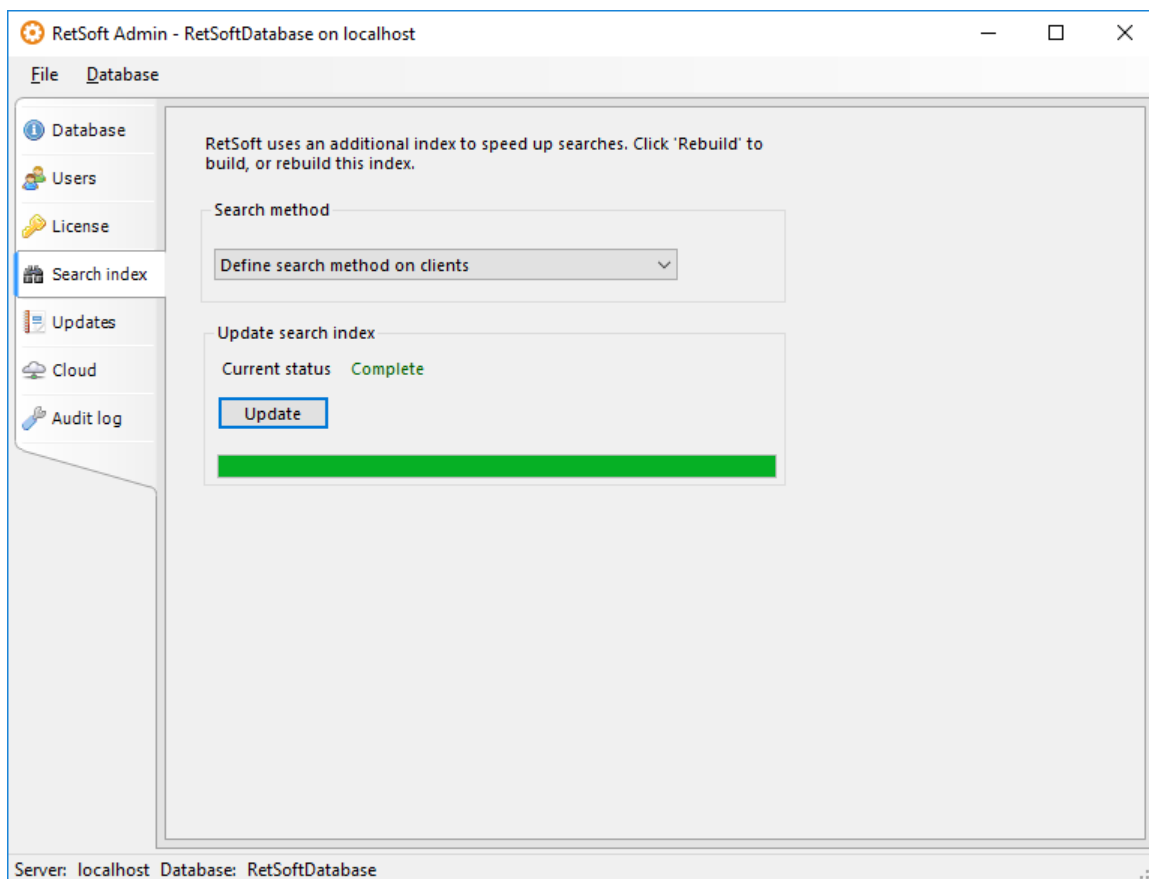
By selecting the 'License' tab you can gain insight into your license information.



You can also enter new license information, mainly used for making changes to your license. For example, when you buy additional clients or decide to add additional modules.

Search and index

By selecting the 'Search Index' tab you can make changes to the way RetSoft searches through your archive.

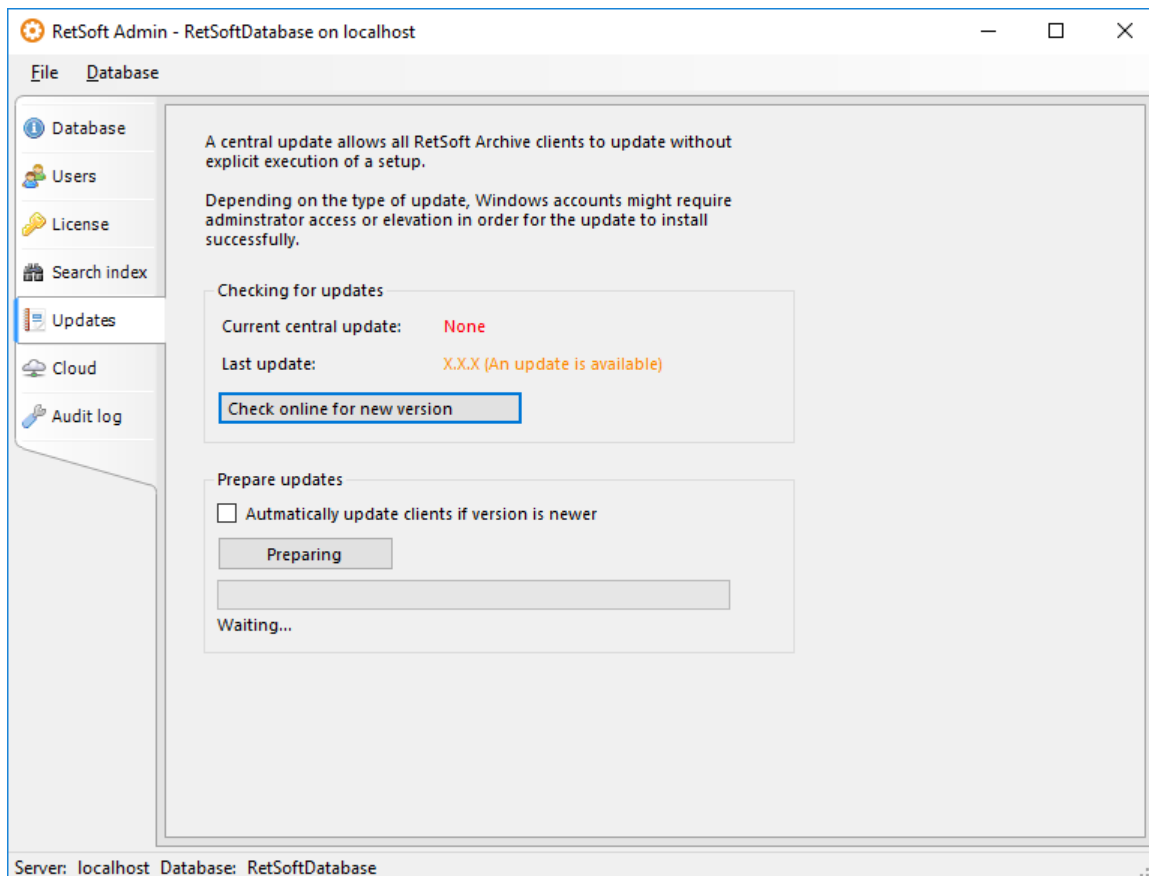


You can select if you want the user to make their own choice in their client, or if you want to force Full-Text search or Linear search on all clients.

Should it be required, you can also re-generate the search index in this tab.

Updates

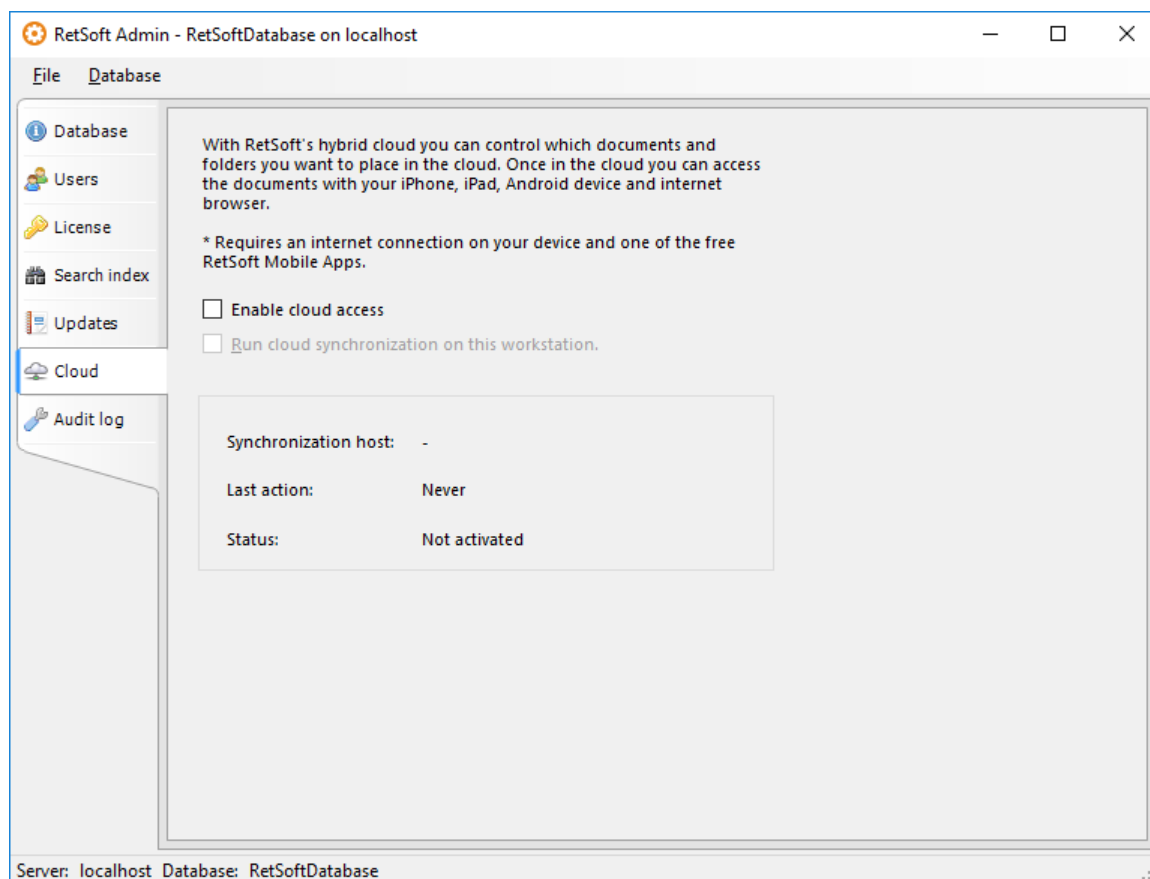
By selecting the 'Updates' tab you can check for new updates of your RetSoft Archive version.



If there is an available update, you can download it and distribute it to other clients on the network. After distribution all clients connected to your RetSoft database will receive a notification about updates, if the checkbox is checked the connected clients will automatically update next time they are started.

Cloud

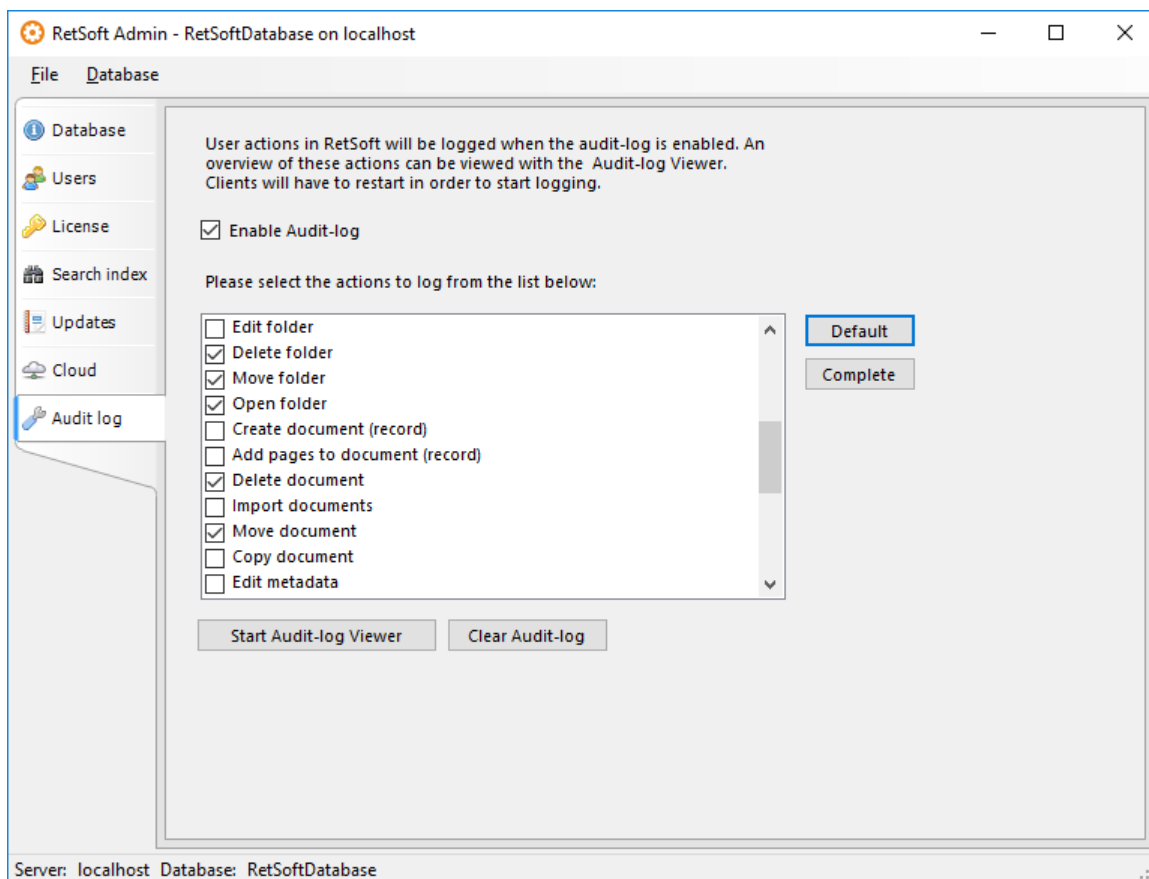
By selecting the 'Cloud' tab you can enable or disable Cloud access for your connected clients.



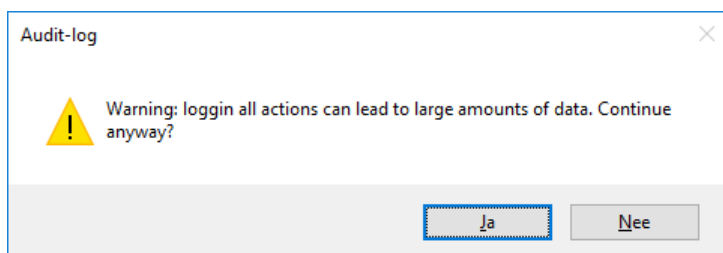
When enabled your database can be synchronized with the Cloud, and you can access your archive from anywhere.

Audit

By selecting the 'Audit' tab you can enable an Audit-log for your archive.



If you enable logging you can select what type of actions you want to log. 'Default' automatically enables logging on standard user interactions, while 'Complete' enables logging on every action listed. Keep in mind that enabling too many categories for logging can have a negative impact on the overall performance of RetSoft, as indicated by a warning:



In the instance your log needs to be cleared, this can be done by selecting 'Clear Audit-log'.

The audit-log viewer

The log can also be viewed using the Audit-log viewer.

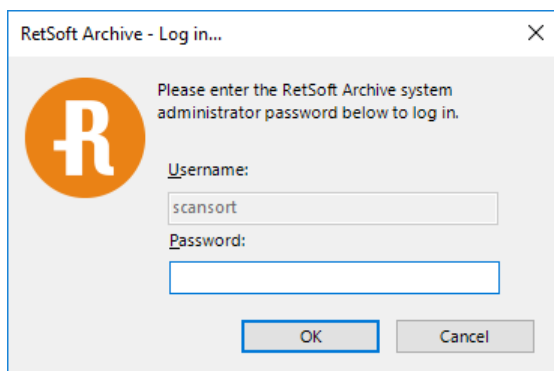
Modules

File Synchronisation

The RetSoft Archive File Synchronization Add-on gives you the option to synchronize Windows directories with folders in RetSoft Archive.

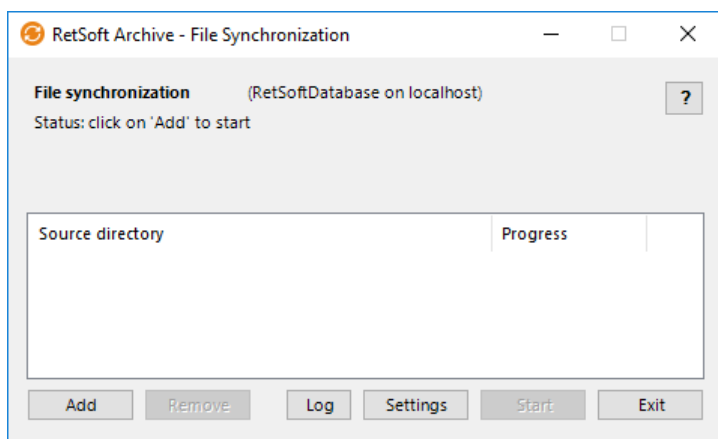
Many software application (such as CRM, financial and branch specific solutions) store documents in a Windows folder on your pc or network. The File Synchronization add-on allows you to store a copy of these documents in your archive. Newly added documents will be added to the archive automatically and modified documents are either updated or added. Documents are made retrievable by content with OCR and text extraction techniques (requires an activated OCR add-on). This makes them easy to find in RetSoft Archive.

The add-on can be started through the "Extra" menu in RetSoft Archive 'Expert' or 'Business+' or in Windows Start. (Requires version 2.0.14 or later). You need to enter the RetSoft Archive system administrator password to log in. You can find the default password in the installation manual if you have not changed it.



Add directories

Click 'Add' to add a directory to synchronize.

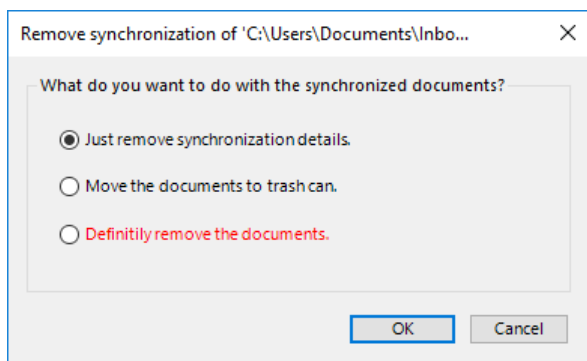


1. You can now choose a directory through the directory browser.
2. Select one and click OK.
3. Synchronization will start immediately. Once done, the search index will be updated automatically. Documents can be retrieved by content when the search index has been fully updated.
4. After this process has been completed, the status will change to "Monitoring". If anything is changed in a monitored folder, or one of its sub folders, the archive will also be updated.
5. You can add multiple directories to synchronize by repeating the steps above.

NOTICE: Newly added folders will become visible in RetSoft Archive if you renew the folder structure. You can renew the folders in RetSoft Archive if you right-click on the root folder and then select "Refresh" from the menu that appears (or press F5). Please note that when a directory has been synchronized it can initially only be accessed by members of the Administrators group. Administrators can make the folders accessible for other users the same way as done on 'normal' folders.

Remove synchronization

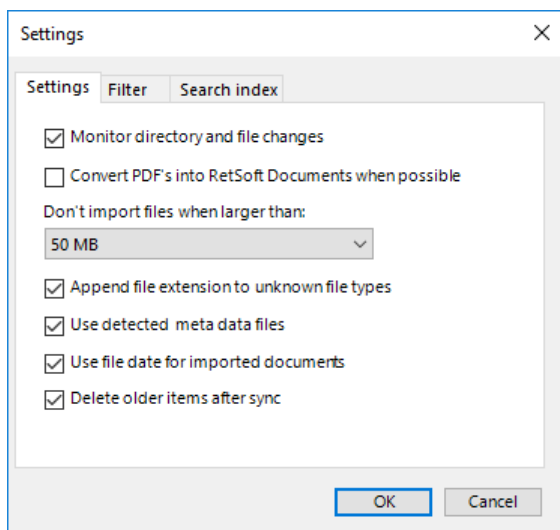
1. Select the "Source directory" you want to stop synchronizing.
2. Click "Remove".
3. Select the desired remove option:.



If you choose to remove the synchronization details only, the synchronization will stop, and the folder and its subfolders and documents will turn into regular items. If you choose to remove the documents definitively the documents will be removed and cannot be recovered. Make a backup before you (definitively) remove something.

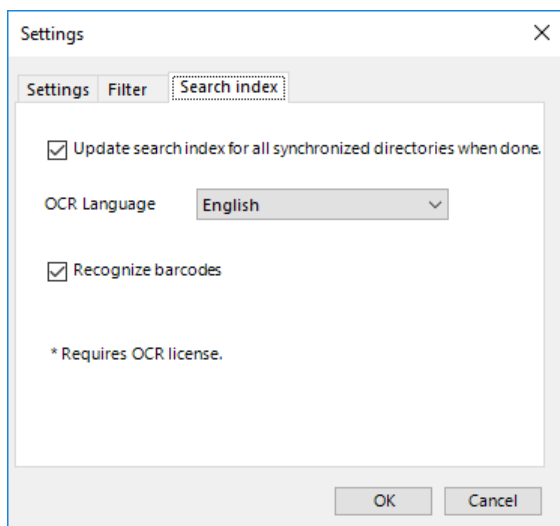
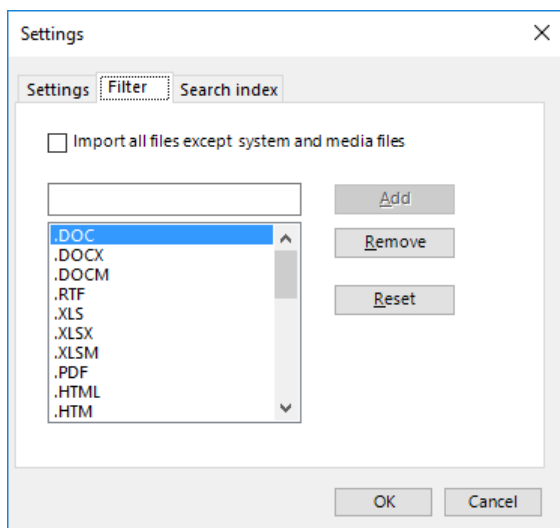
Settings

In most cases you can use the default settings, but if you want to change any of settings you click on the 'Settings' button.



- Monitor changes directory and file changes - When something changes in the monitored files or directories, the archive is automatically updated.
- Convert PDF's into RetSoft Documents when possible - Most PDF's are converted into RetSoft Documents when this option is checked. There are however some types that will not convert. These are types that can't be converted or types that contains additional information that might be lost during conversion. More information can be found on our FAQ.
- Don't import files when larger than... - Specify the maximum size (in MB) of the files that you want to import.
- Append file extension to unknown file types
- Use detected meta data files
- Use file date for imported documents - When this option is checked the imported documents inherit the file's last modified date, and the current date otherwise.

There are two more tabs with settings: "Filter" and "Search index":



- At the "Filter" tab you can specify a custom filter for file types that you want to import.
- Updating the search index can be turned on or off at "Search index" tab. You can also select a primary OCR recognition language and enable or disable barcode recognition.

Information about the (progress) of the synchronization process can be obtained by pressing the 'Log' button.

Advanced automated synchronization via startup parameters

You can start FileSync with start-up parameters as well. This allows you, for example, to schedule daily synchronizations via the Windows Task Scheduler.

You can use the following parameters:

Parameter	Alternative Parameter	Description
-synconce		Enables FileSync to run with startup parameters. This parameter is always required.
-username	-u	Username for logging into FileSync. This is always followed by the username itself.
-password	-p	Password that accompanies the prior mentioned username. This is always followed by the password itself.
-skipindex	-x	Do not index new documents after synchronization.
-server		IP adres or name of the server. (Optional)
-database		Name of the database. (Optional)
-type		Servertype (MySQL or MSSQL). (Optional)
-port		The serverport where the database is accessible. (Optional)

Example:

```
RsFileSync.exe -synconce -skipindex -u simon -p secret
```

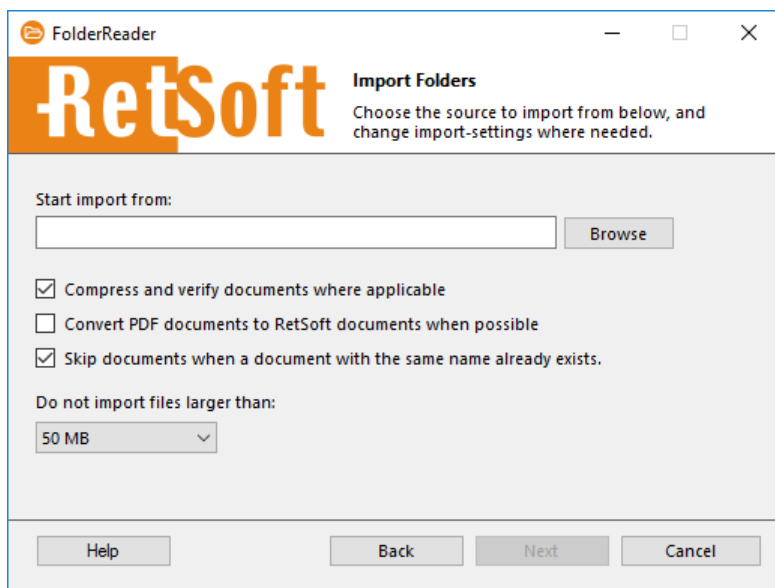
The above line logs the user into FileSync as the user 'simon' using the password 'secret' and skips indexing new documents after synchronization is completed. Parameters and alternative parameters can be freely interchanged. You can use -password but also -p.

Folder Reader

With the 'RetSoft Archive Folder Reader' a directory structure on the hard disk can be imported into a RetSoft archive. All directories and all supported files are imported. You can also provide documents with metadata.

Attention: Documents are only searchable by content after OCR text recognition with RetSoft Archive has been applied.

Reading a folder

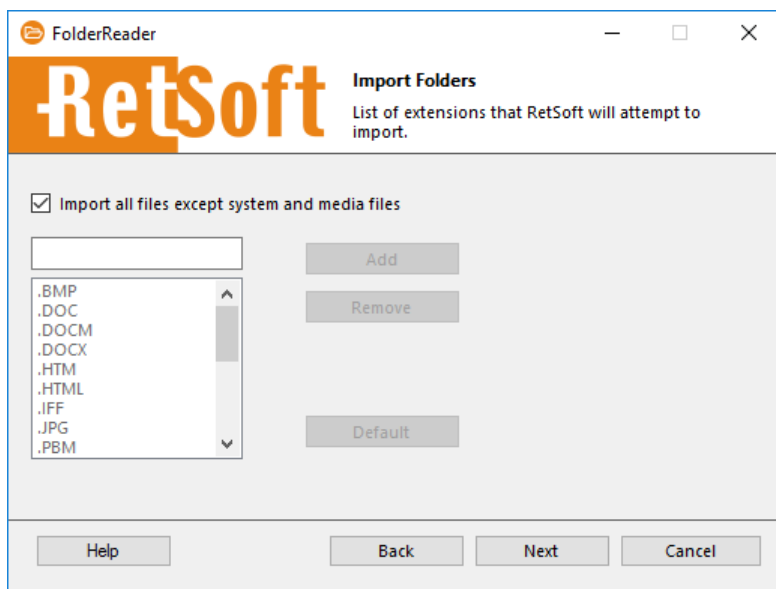


In the upper text field you can select the starting point of the import. With the "Browse..." button you can look up this director, for example "C:\Program Files". With this directory selected, all supported files and folders within "C:\Program Files", will be imported.

Also, there are two options on this window:

- Verify and compress documents if possible - (checked by default): This option checks if a supported files can be compressed and if so, compresses them before importing them in the archive.
- Do not import files if larger than - Files which are larger than the selected value are not imported. For best practises we advise you to avoid large files in the archive.

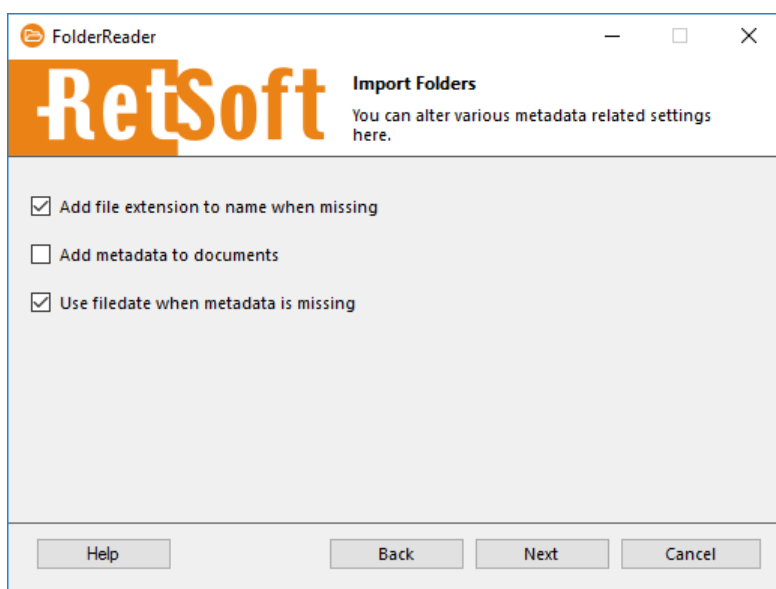
Select Next to go to **step 2**:



In this window you can select which file extensions you want to import. You can add and remove file formats. The 'Default' button allows you to restore the default file formats which are supported by the application.

The option 'Import all files except system and media files' (not checked by default) will let you import all files which are smaller than the selected maximum, are imported (see 1st window). Files that have been marked as system file or listed as system or media file types, like for example mp3, wav, exe, dll, mp4 etc, will not be imported. Notice that the size of an archive can grow rapidly with this option checked!

Select Next to go to **step 3**:



In this window you can change settings regarding a document's metadata (name, key words etc).

- Add file extension to document name for unknown file types (checked by default) - When a file format is not recognized by RetSoft Archive, the file extension is added to the name of the document in the archive.
- Apply metadata to documents (unchecked by default) - When this option is checked, the application will search for metadata files during the import. Refer to "Metadata files" further in this manual for more information.
- Use file date if metadata 'date'-field is missing (unchecked by default) - When no date has been set in the metadata file, the system date of the file will be used. In all other cases the current system date is used.

Select Next to go to **step 4**

For 'Pro' or 'Business' users this step will look like this:

At 'Destination file for archive:' you can set the file name for the destination archive. NOTE: This cannot be an existing file! (If needed) you can set an 'Optional destination folder in archive'. This is as folder in the archive in which all the imported files and folders are placed.

For 'Expert' or 'Business+' users this step will look like this:

To make a connection with an RetSoft Archive Expert archive, it is of great importance that you have the server connection information on hand. After you have set these options, click on 'Refresh' to retrieve a list of available databases. Select your RetSoft Archive database.

(If needed) you can set an 'Optional destination folder in archive'. This is a folder in the archive in which all the imported files and folders are placed.

If you click 'Next', **the import of the files and folders will start.**

Metadata Import

Metadata files

In RetSoft Archive some extra information can be added to a document in the form of metadata. During the import, metadata can be added automatically as a text file with the following layout:

```
Name: <Name of file>
KeyWord1: <Keyword 1>
KeyWord2: <Keyword 2>
KeyWord3: <Keyword 3>
KeyWord4: <Keyword 4>
KeyWord5: < Keyword 5>
Date: <Date 'yyyymmdd' format>
Zipcode: <Zipcode>
```

Attention:

- A Metadata-file has the same name as the file that represents the document, but it should have the extension ".rmd" (RetSoft Meta data).
- Metadata files must be placed in the same folder as the documents where they belong to.
- The length of a metadata field is limited to a maximum 50 characters per field.

An example:

For the file "Invoice.tif" you want submit the following metadata: "My company", invoice number "12" and the date "05-05-2009". Create the following file with for example notepad:

```
Name: Invoice
KeyWord1: My Company
KeyWord2: 12
KeyWord3:
KeyWord4:
KeyWord5:
Date: 20090101
Zipcode:
```

Store this file in the same folder as "Invoice.tif" with the file name "Invoice.rmd".

It is also possible to use XML files* to do metadata imports with Folder Reader.

Example:

```
<?xml version="1.0" encoding="UTF-8"?>
<metadata id="1234">
  <name>Document Name</name>
  <keywords>
    <word id="1">First</word>
    <word id="2">Second</word>
    <word id="3" />
    <word id="4" />
    <word id="5" />
  </keywords>
  <zipcode>1234AB</zipcode>
  <isodate>20150520</isodate>
  <memotext />
</metadata>
```

If you create a XML file for use with the Folder Reader, make sure that you save the XML using the name of the original file with extension (for example, if the file you are creating metadata for is named 'Invoice.pdf', then the XML file should be named 'Invoice.pdf.xml' and be placed in the same directory)

These XML Files are identical to the ones generated by RetSoft Shadow Archive. RetSoft FileSync can also use these metadata XML files.

Advanced automated folder reading via startup parameters

It is possible to start up folderreader with parameters. This allows you to schedule a timed export via the Windows Task Scheduler. It's recommend to do this as a basic task of the user itself, and not as an advanced task under another domain/user account.

You can provide the following parameters:

Parameter	Alternative Parameter	Description
-run		Masterflag for starting an export with parameters, this flag is always needed.
-username	-u	Username for logging into the database. Followed up by the actual username.
-password	-p	Password for logging into the database, followed up by the actual password itself.
-source		The source location (ie, the Window folder you wish to import into RetSoft)
-target		The target location in your RetSoft Archive, \ for the root folder.
-server		Hostname or IP-address of the database server hosting the RetSoft Archive database.
-database		Name of the RetSoft Archive database.
-type		Servertype (MySQL or MSSQL). (Optional)
-port		The serverport where the database is accessible. (Optional)
-ignorefiledate		Disable the use of filedate when importing.
-ignorefileext		Disable the automatic adding of file extensions.
-		
allowduplicates		Add existing documents when importing.
-maxfilesize		Maximum filesize (in megabytes)
-pdfconversion		Enable PDF conversion when possible.

Example:

```
Folderreader.exe -run -u scansort -p secretpassw0rd -target \Invoices\2017 -source c:\scans\invoices -ignorefiledate
```

The example above logs in as the 'scansort' user with the password 'secretpassw0rd' The folder 'c:\scans\invoices on your hard drive will then be imported into \Invoices\2017 of your archive. Additionally due to the --ignorefiledate option, the Windows file date is ignored as date for the file.

Parameters and their aliases are freely exchangeable, you may use -password but also -p.

Template Manager

When you apply our OCR technology (kb/159) to a lot of similar documents, you can use the template manager to optimize this process, this has the following benefits:


- You can specify regions to process and save this as a template. This means you won't need to specify the regions for every scanned document individually anymore.
- Because you've now specified regions to apply OCR to, the OCR process itself is much faster.
- Because you only apply OCR to the most important text, your search-index will remain cleaner and searches can be done faster as a result.

Example

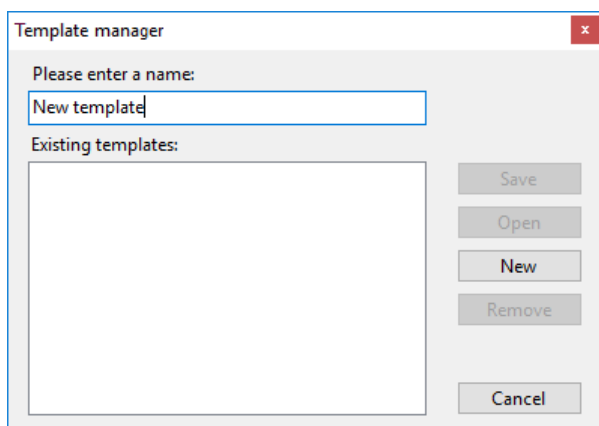
You want to scan hundreds of documents that contain a customer number. All these documents have the customer number listed on the same position. Applying OCR on these hundreds of documents on the full document would take a long time. Specifying the region with just the customer number for each of these documents individually would take even longer.

With template manager you could specify the correct region in only one document and store it as a template. Now every time you scan a similar document you can apply this template and speed up your work flow considerably. Changing OCR-related settings can be done in the RetSoft Archive Settings, please refer to the Quick Start Manual for RetSoft Archive.

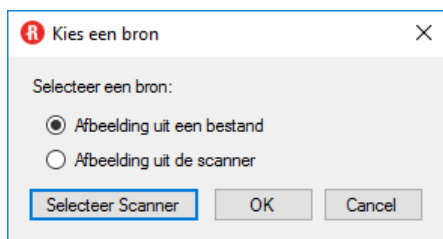
Creating templates

To create a new template, you can click on the button: 

You will see the following window:



In the textbox under 'Please provide a name' you can enter a new name for a template. Click the button "new" and the follow window will appear:



Here you can make a selection between providing an image from disk or scanning in a new document. If you have multiple scanners available, you can select one by pressing the 'Select scanner' button. If you want to use a document that is already in RetSoft Archive, you will have to export this document first.

WARNING: Make sure the document you are applying the template to has the same layout as the template you want to apply to. If you apply a 'Letter-size' template to an A4-document the regions will not perfectly match up.


Choose a method and select OK.

If you chose to use an image from the scanner, a popup from your scanner will now show up.


If you chose to use an image from a file then an 'Open file' window will show up.


In this window you can navigate to your desired image. After select this image it will be loaded in and displayed in the main view of the template manager.

Opening templates

To open a template, click on the button .

This will open the template manager window again, click on the button 'Open' to load the selected template.


To change the current image, click one of the following buttons: 


With the  button you can switch between scanners when needed.

The left button allows you to pick a file from your hard drive. The right button will load a new image from your scanner.


Once you have the desired image loaded in, you can start adding regions.

Creating and removing regions

In the image you have loaded you can now add regions by pressing the  button. This will place a region on top of your image which you can move and resize to fit your needs.

Regions can just as easily be removed. If you select a region and press the  button you will remove the currently selected region.

Saving templates

You can save a template by pressing the  button.

If you want to save the template under a different name, then use the "Save As..." option from the menu.

In the textbox under 'Please provide a name' you can type a new name. Click the 'Save' button to save the template. The template is then stored with an ".osl" extension in the folder "Templates". You can find this folder in the location RetSoft Archive is installed in.

Deleting templates

You can select a template and press 'Remove' to permanently delete it.

Audit-Log Viewer

The audit-log tool gives you a comprehensive view of the actions users have taken in the RetSoft Archive 'Expert' or 'Business+' software environment*. The audit-log is being administrated from RetSoft Admin (kb/188). The view can be brought up with the audit-log viewer tool.

Administration:

Start RetSoft Admin, log in and select 'Audit-log (kb/188#199)'.

For more information on setting up the audit log, refer to the corresponding chapter (kb/188#199).

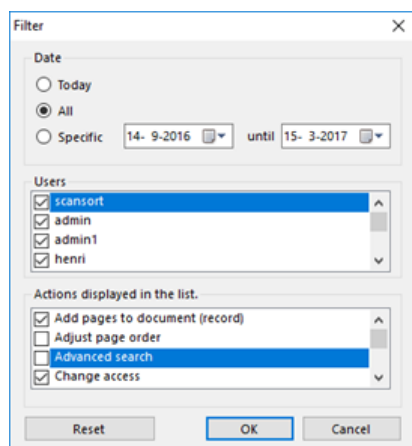
Several types of actions can be logged at different levels. To reduce the size of the audit-log, we recommend that you make your own selection of actions that you wish to log. An audit-log can be cleared by clicking the 'Clear audit-log' button. This action cannot be undone. You can also start the 'Audit-log Viewer' from this location.

* Actions taken in 'RetSoft Admin' or any of the external RetSoft modules such as 'File Synchronization (kb/228#229)', 'Shadow Archive (kb/228#237)' and 'Template Manager (kb/228#231)' will not be logged for auditing. Actions performed on our hybrid cloud will also not be logged.

The Audit-log Viewer

A view of logged actions can be brought up with the Audit-log Viewer. This application can be started from RetSoft Admin, or in the menu in RetSoft Archive under 'Extra' – 'Tools' when logged in as an administrator (RetSoft administrator). Just like in RetSoft Admin you are required to log in as the administrator user 'scansort'.

Start the 'Audit-log Viewer' and the following window appears:

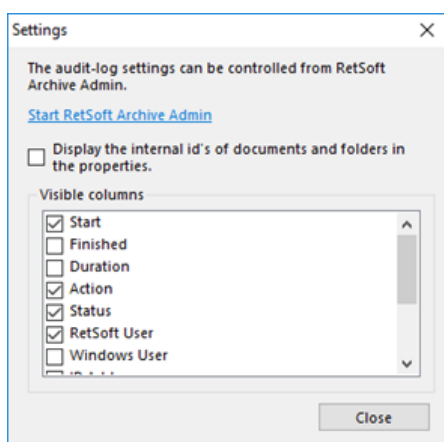


In this screen you can set a filter. You can select what users to log the actions for, and what actions you want to log from these users. You can also enter a specific period to check for. You can reset back to the default filter by clicking the 'Reset filter' button. Click 'OK' to restart and the following view will appear:

Start	Action	Status	RetSoft User	Location	Documentname	Description
15-3-2017 09:10:38	Open folder	Finished	user1	\		Map '\ openen.
15-3-2017 08:58:57	Open folder	Finished	user1	\		Map '\ openen.
15-3-2017 08:58:57	Open folder	Finished	user1	\		Map '\ openen.
15-3-2017 08:58:53	Open folder	Finished	user1	\		Map '\ openen.
15-3-2017 08:58:51	Open folder	Finished	user1	\Mail\Post		Map '\Mail\Post\'
15-3-2017 08:58:51	Open folder	Finished	user1	\Mail\Post		Map '\Mail\Post\'
15-3-2017 08:58:38	Delete document	Finished	user1	\Mail\Post	Bealstingdienst	Document 'Bealst
15-3-2017 08:58:38	Delete document	Finished	user1	\Mail\Post	Bol.com	Document 'Bol.co
15-3-2017 08:58:38	Delete document	Finished	user1	\Mail\Post	Bealstingdienst	Document 'Bealst
15-3-2017 08:58:35	View document	Finished	user1	\Mail\Post	Bealstingdienst	Weergeven 'Bealst
15-3-2017 08:51:28	View document	Finished	user1	\Mail\Post	Post 004	Weergeven 'Post (
15-3-2017 08:51:25	View document	Finished	user1	\Mail\Post	Post 003	Weergeven 'Post (

This view contains comprehensive information on the actions of users. By clicking on a column header you can change the sorting options. By default the sorting is done chronologically. Via the toolbar and the menu several options are available. Following is a small description of these options.

- **Refresh** - Update the audit-log viewer display with the latest information.
- **Set filter** - Change the filter settings for the view.
- **Display details** - Certain logged actions contain additional details. Double-click on the corresponding action or select 'Display additional details' in the menu for these actions. Affected are 'Advanced search (kb/104#106)', 'Change permissions (kb/188#194)' and 'Edit properties (kb/91#110)'.
- **Search** - A window pops up allowing you to specify a search for specific actions.
- **Settings** - Click in the menu on settings and the following window pops up



You can select multiple columns here for the audit-log view or start 'RetSoft Admin' (to set administrative options). You can also enable the display of internal ID's of documents and folders in the descriptions. This ID will be placed between square brackets and can be used to trace problems with RetSoft Archive. You can do this by starting a simple search in RetSoft, and in the textbox enter \$id=? in the Search' window, replace ? by the id-number.

- **Export to Excel** - You can use this function to export a list of actions to an excel document.

If you are experiencing any problems with RetSoft Archive please check our FAQ (FAQ).

Accessibility Viewer

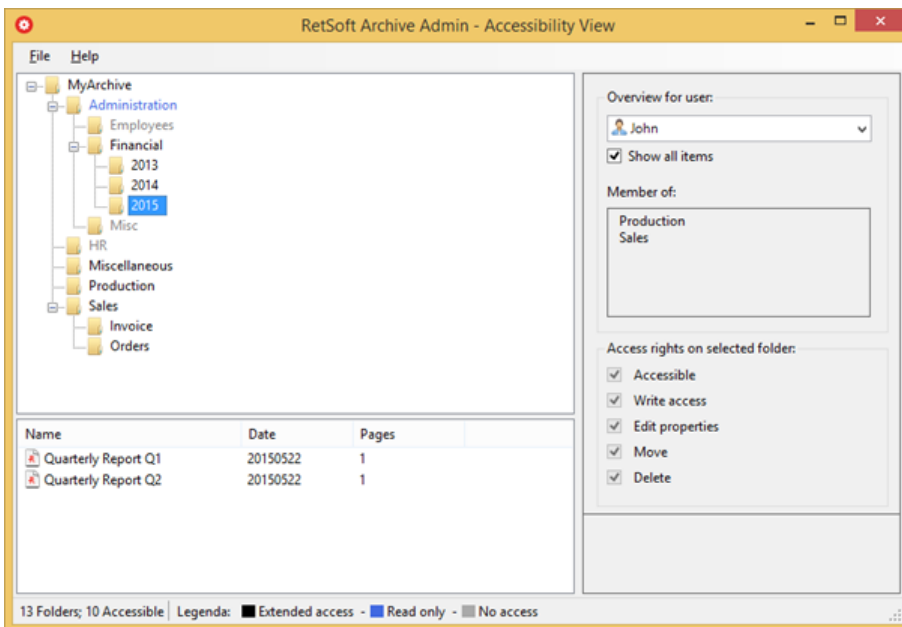
This tool allows the administrator to get a quick overview of what folders and documents can be seen and edited by which users.

Below '**Overview for user**' you can choose a user for which you want to see the access rights. A user in RetSoft Archive is a member of one or more user groups. Groups are added and edited in RetSoft Admin. These user groups determine the definitive accessibility that a user will have. After a group has been added, folder rights for it can be set by an administrator in RetSoft Archive by right clicking on a folder or document and selecting '**Properties**'. Here you can select the '**Security**' tab to set the accessibility of user groups for that specific folder or document.

In the overview you can see the folders (and documents) that a user has rights to. If the option '**Show all items**' is selected, you will see all folders and documents. Folders and documents who are not accessible by the selected user will be greyed out. If the amount of access is limited (read-only), the folders or documents will be marked blue.

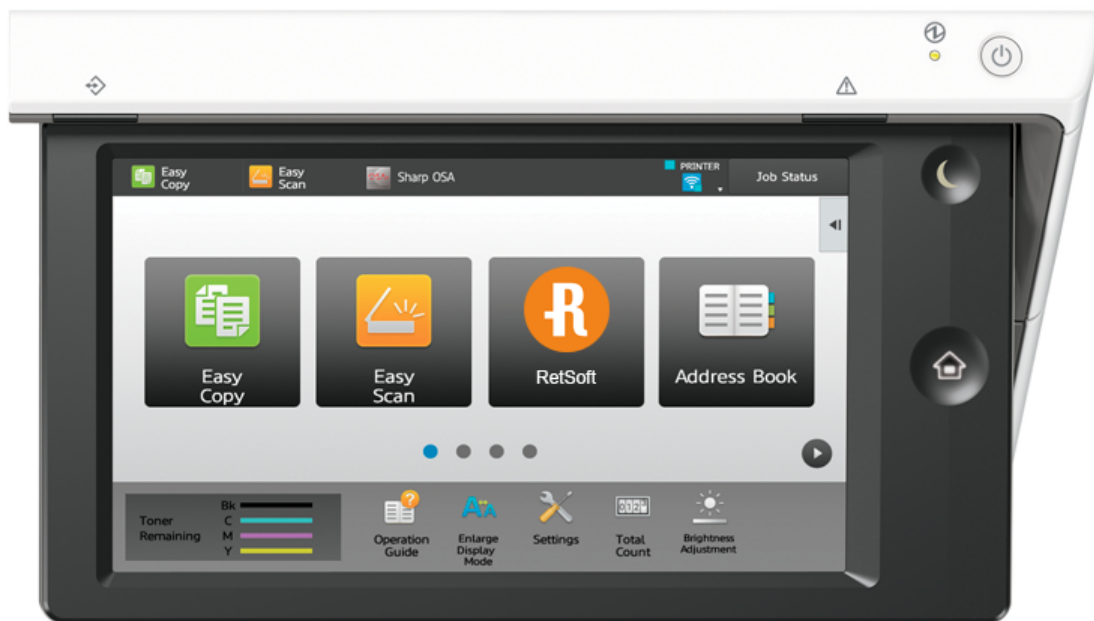
Inboxes (kb/129) in RetSoft Archive behave differently to access rights: A user will always have full control over their own inbox. Other users can be assigned rights (kb/188#194) to an inbox from version 3 onwards in the same way you normally assign rights to a user.

NOTICE: A 'snapshot' is made of the rights structure on launching the Accessibility View tool, if you make any changes while the tool is active, you will need to restart Accessibility View to refresh the overview.

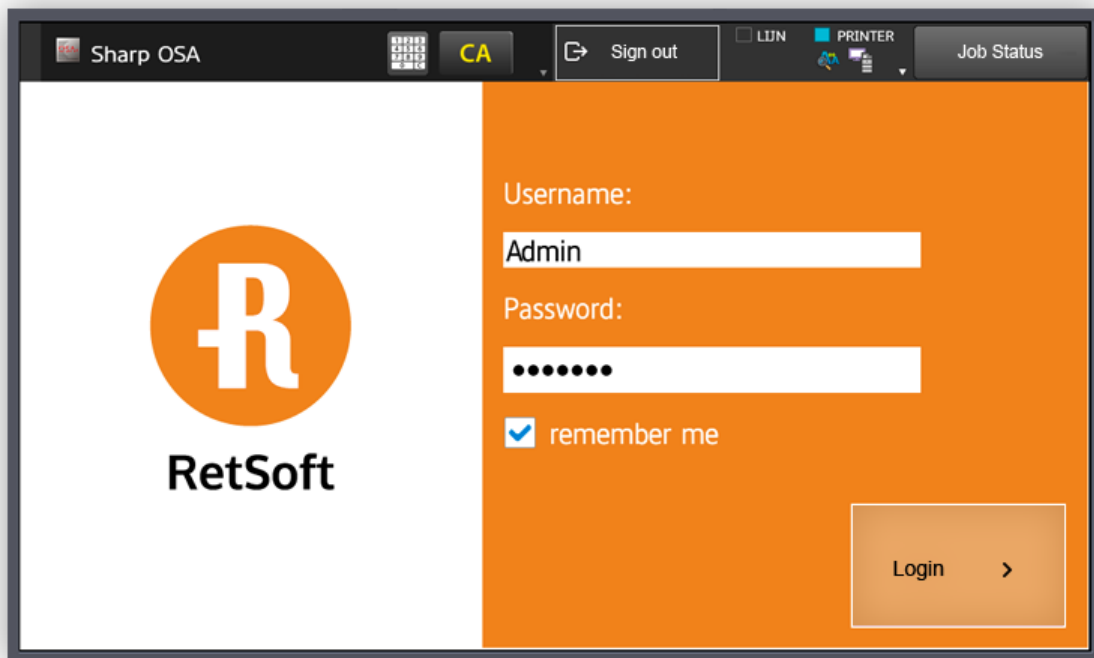


Sharp Connector

When you have Sharp MFP's you can also use our OSA connector. This will give you access to RetSoft at the machine via its screen.

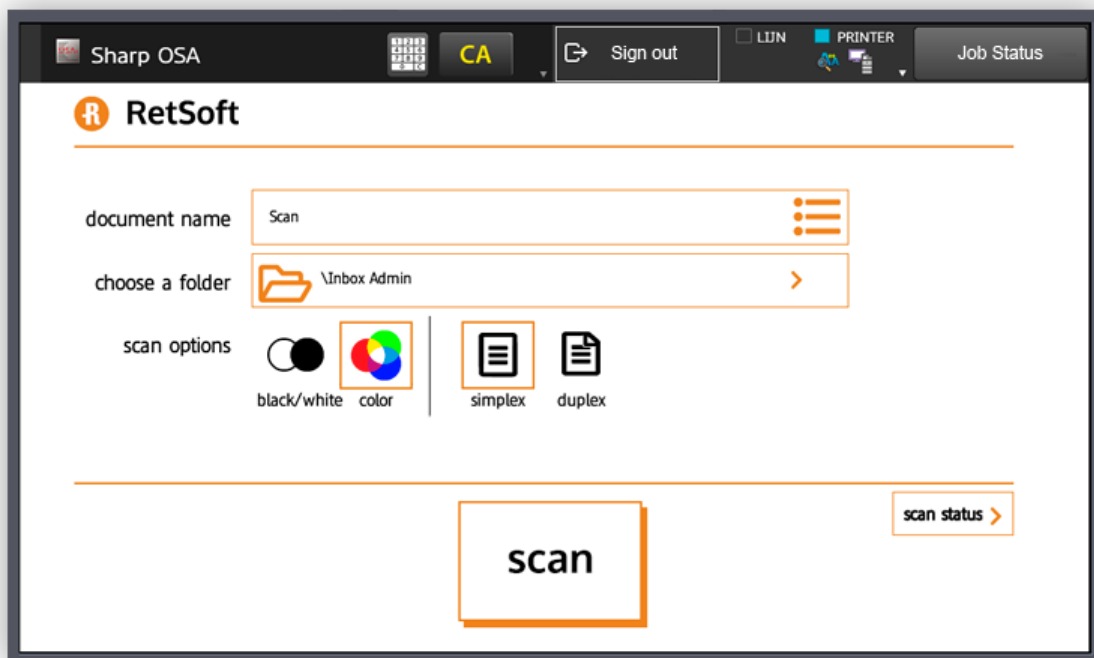


You will get a special 'RetSoft' button on the start screen. After clicking the RetSoft button you will see the following screen.



The login interface features a dark grey top bar with the 'Sharp OSA' logo, a 'CA' button, a 'Sign out' button, and status indicators for 'LJN' and 'PRINTER'. A 'Job Status' link is on the right. The main area is split: the left side is white with the RetSoft logo (an orange circle with a white 'R') and the text 'RetSoft'; the right side is orange and contains the login form. The form includes labels for 'Username:' and 'Password:', input fields with 'Admin' and masked characters respectively, a checked 'remember me' checkbox, and a 'Login' button with a right arrow.

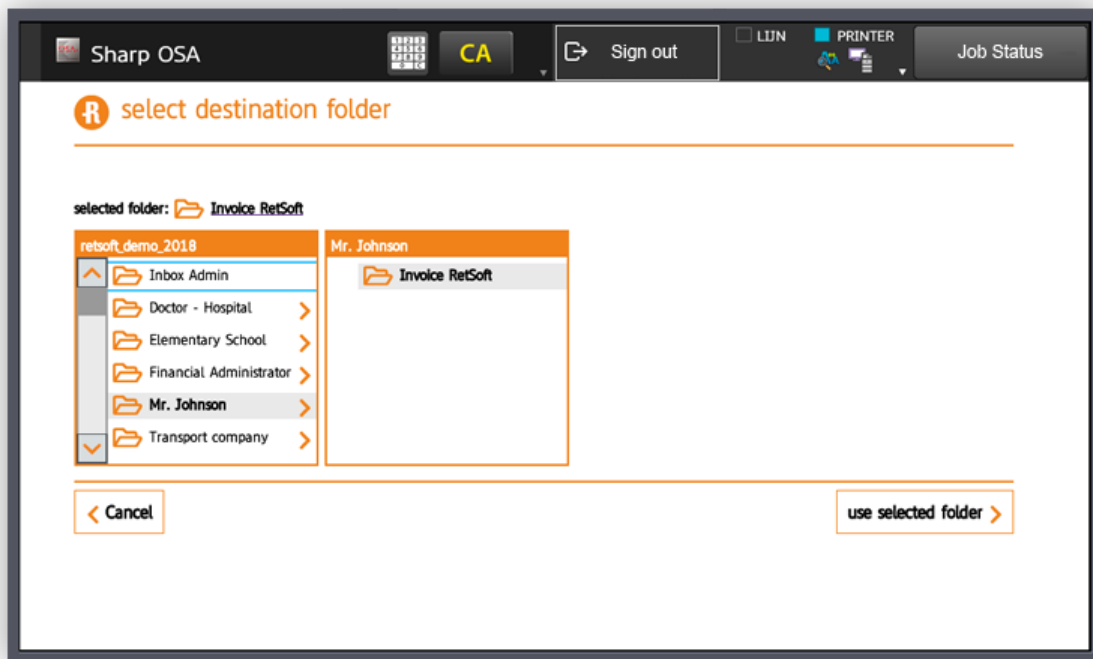
Here we ask the user to log into RetSoft using his or her username and password. This way the user can scan directly into folders that are protected by a login system.



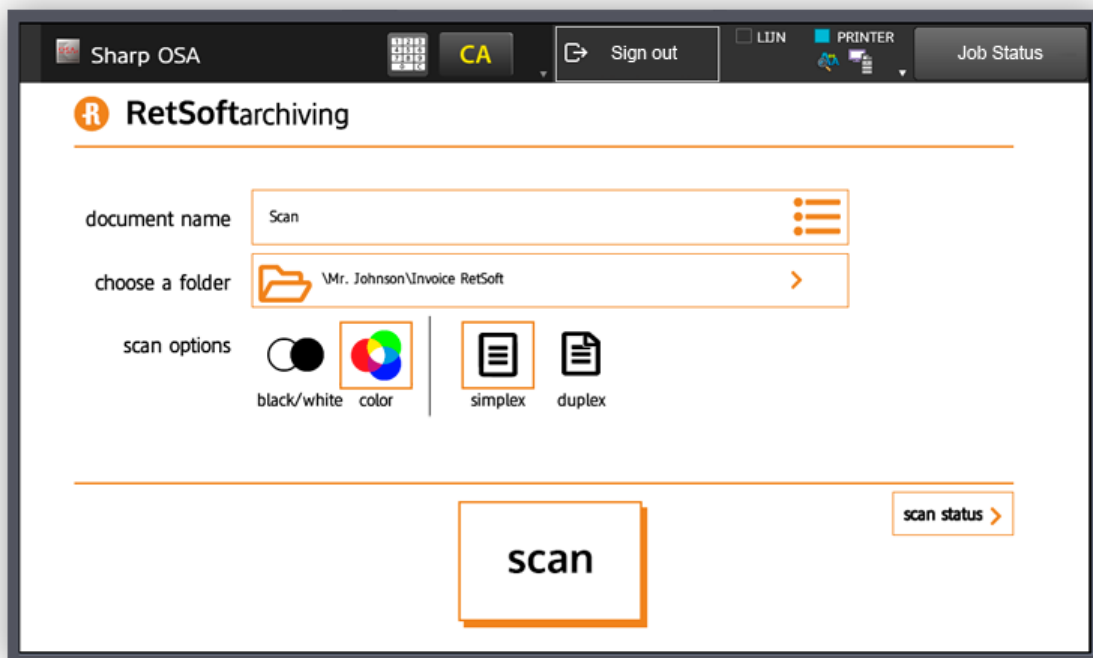
The scan configuration interface has a dark grey top bar identical to the login screen. Below the bar, the 'RetSoft' logo and name are on the left. The main area is white and contains several configuration sections: 'document name' with a text field containing 'Scan' and a menu icon; 'choose a folder' with a folder icon, the text '\Inbox Admin', and a right arrow; 'scan options' with radio buttons for 'black/white' and 'color' (the latter is selected), and icons for 'simplex' and 'duplex' scanning. At the bottom, there is a large 'scan' button and a 'scan status' link with a right arrow.

After logging into there are several options:

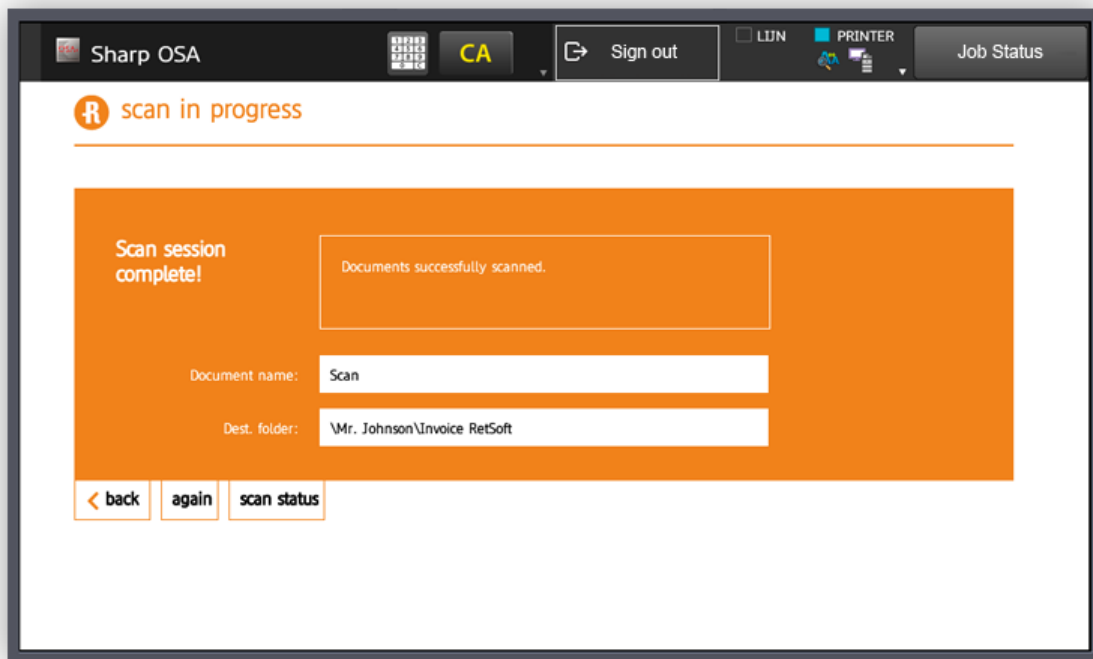
- Document name – specify which name the document should get
- Folder – browse the RetSoft Folder structure and choose in which folder the scan should be saved
- Scan options – choose the quality of the scan and whether you want simplex or duplex scans



This screen is shown if you want to select a different folder that the default Inbox of a user. The user can browse through all available folders in Retsoft that are accessible to the user.



If you are ready, click "scan" to start the scan operation.



When the scan is completed you see the screen above. If anything went wrong, you will get an error message on your screen.

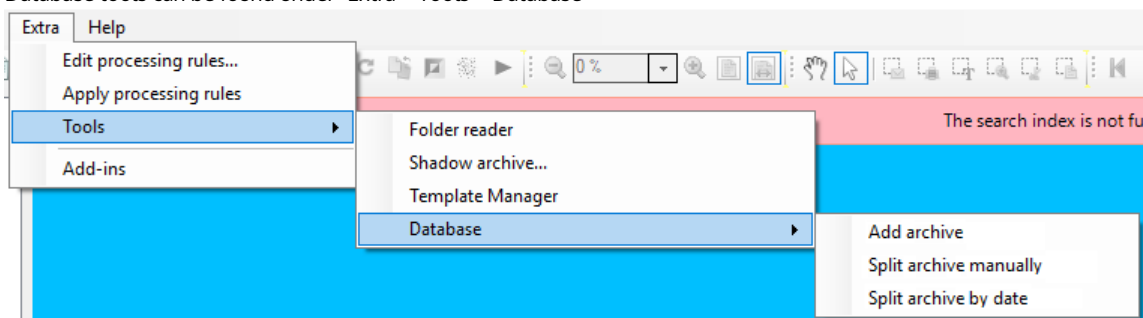
Questions?

If you want to try the Sharp OSA connector, please contact the Support Team, they will guide you through the installation. You can reach them at support@retsoft.com (<http://support@retsoft.com/>)

Database Tools

With database tools you can combine or split your RetSoft Archive Pro or Business databases.

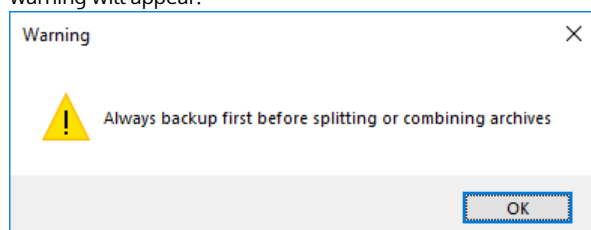
Database tools can be found under "Extra > Tools > Database"



Add archive

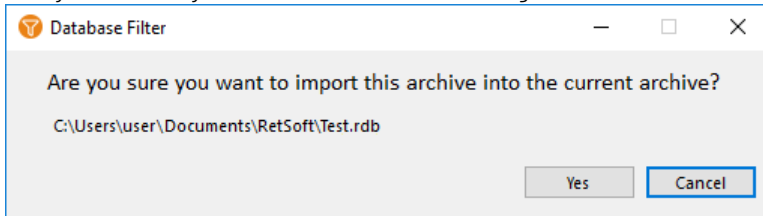
To add an archive to the current open archive, you have to select "Add archive"

You can now select an archive to add anywhere on your computer, when you select an archive and wish to add this, the following warning will appear:



It is important to make backups of your archives first.

Next you can check your selection and resume the merge.



Select 'Yes' to start the merge.

When the archives are merged you can close this screen.

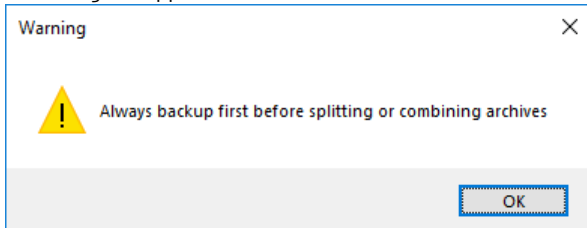
To see the changes in RetSoft you need to refresh your archive by right clicking it and selecting 'refresh'.

Split archive

Archives can be split in two ways, manually or by date.

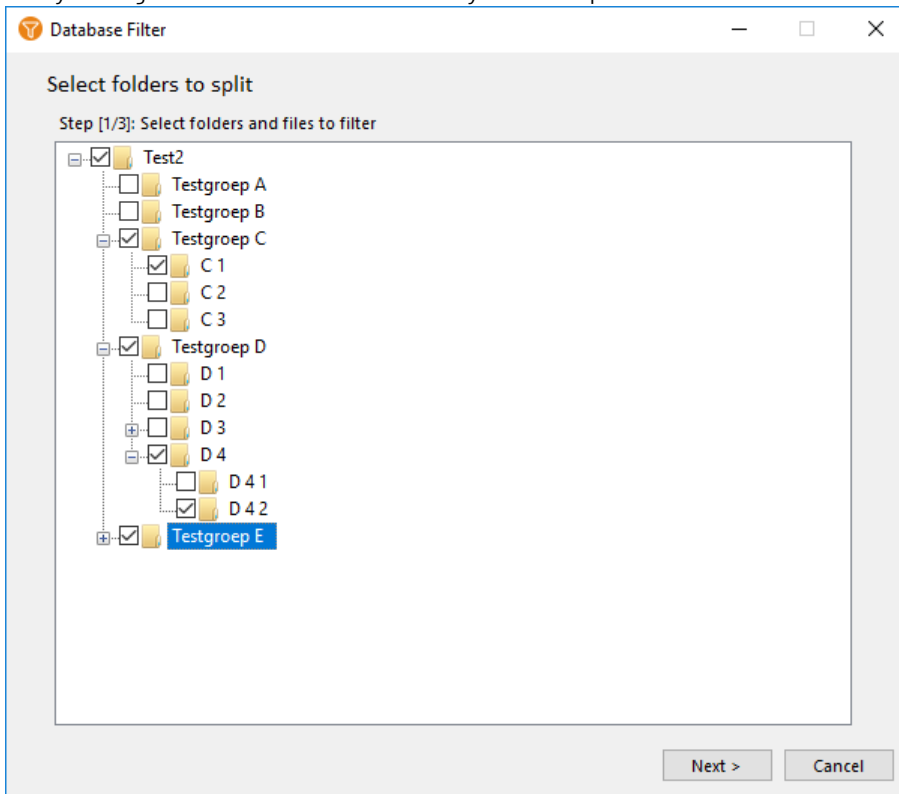
To split the current archive manually you need to select the option 'Split archive manually'

A warning will appear:



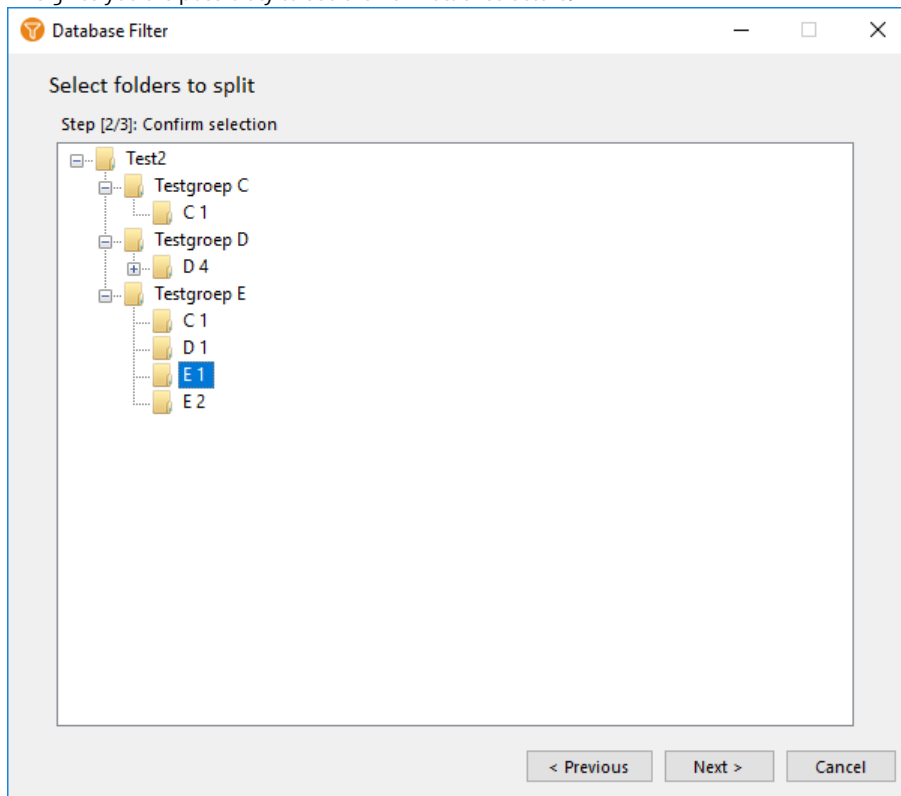
It is important to make backups of your archives first.

Next you will get the chance to select the folders you wish to split:



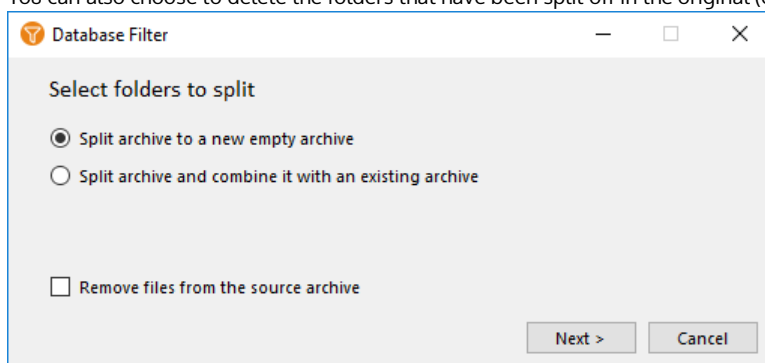
Select the folders you want and click 'Next'

This gives you the possibility to see the new folder structure:

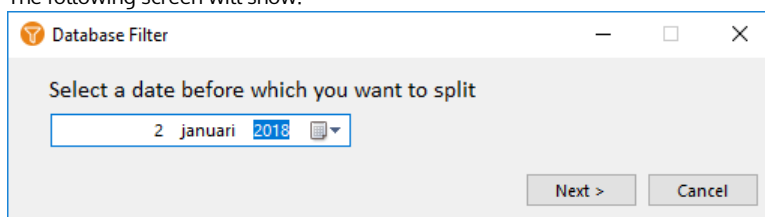


If this is correct you can select 'Next' to proceed to the last step.

In the last step you can choose to split the archive to an entirely new archive or add the split off part to an existing archive. You can also choose to delete the folders that have been split off in the original (current) archive.



Archives can also be split by date with the option 'Split archive by date' The following screen will show:



You can select a date here, all files before this date will be split. When you select 'Next' you will get the same last step as explained above.

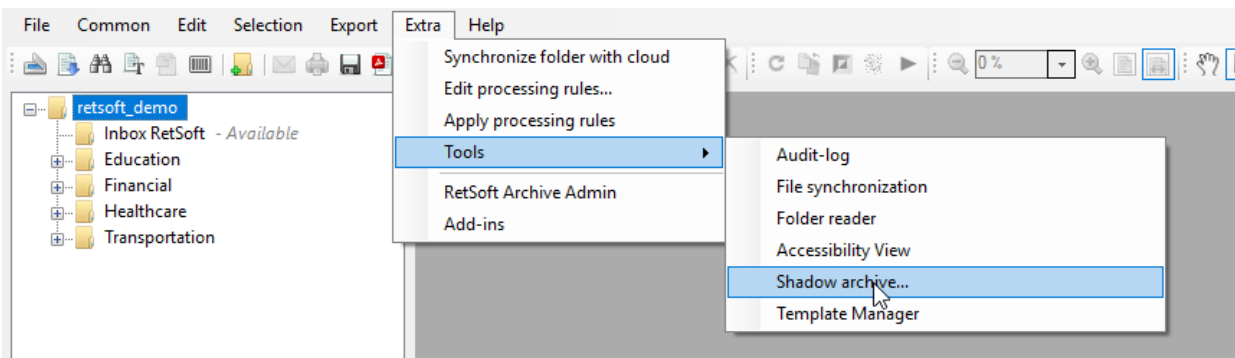
Shadow Archive

Shadow Archive is one of the modules that can be added to RetSoft. It allows you to copy your RetSoft Archive to a target folder of your choice. If you want to stop using RetSoft at a certain time, you can use Shadow Archive to easily export the RetSoft Archive while keeping the same folder structure. This means you can switch to a different system at any time.

Starting Shadow Archive

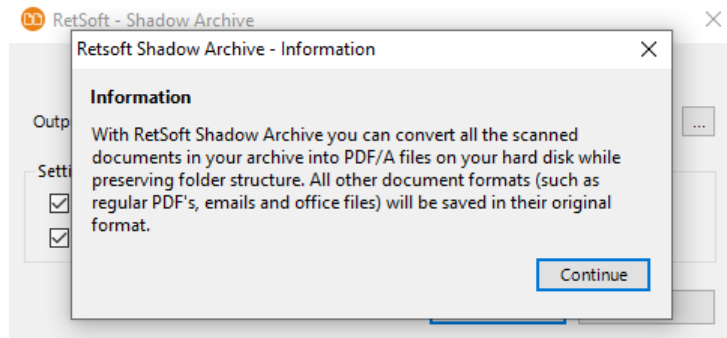
Once you have opened RetSoft, you have access to Shadow Archive via the menu bar.

- Extra -> Tools -> Shadow Archive

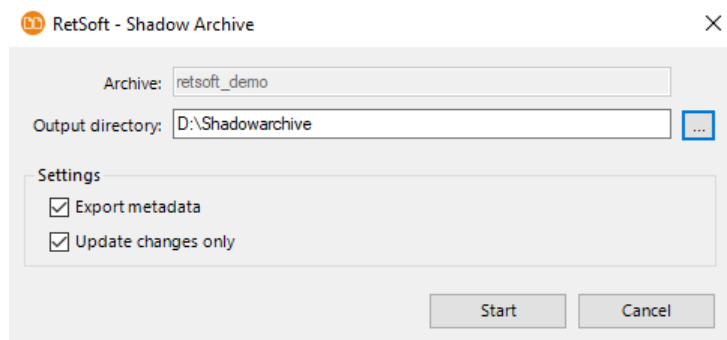


Using Shadow Archive

It is quite easy to use Shadow Archive. When you have clicked on Shadow Archive, you will see the notification below. It will tell you which file format will be used to save your exported documents.



After you have clicked on Continue, a window will appear and you can indicate where your target folder is located. This could, for example, be a local folder, a folder on a network hard drive or a folder on a server. You can also indicate whether the meta data should be exported and whether you only want to process changes in the archive. When everything is set up, you can click on Start. The entire archive will then be exported to the location indicated by you.



Once the export is completed, a notification will appear that shows information about the export.

