R:Archive X.5 Enterprise

Help Manual

R:Archive X.5 Enterprise

Manual

by R:BASE Technologies, Inc.

Welcome to R:Archive X.5 Enterprise!

R:Archive is a powerful document archival management system that allows users to automatically, or manually, scan documents into PDF documents using a scanner.

After a document is scanned, R:Archive allows users to alter the PDF document properties to allow extended search capabilities in the future.

R:Archive also allows users to search and index PDF documents available to the computer. Once the documents are indexed, the user can easily review the PDF document information and preview the actual file.

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Part I

1   Introduction

1.1   Introducing R:Archive X.5 Enterprise

R:Archive is a powerful document archival management system that allows users to automatically, or manually, scan documents into PDF documents using a scanner. After a document is scanned, R:Archive allows users to alter the PDF document properties to allow extended search capabilities in the future.

R:Archive also allows users to search and index single or multiple PDF documents available to the computer. Once the documents are indexed, the user can easily review the PDF document information and preview the actual file.

The R:Archive application offers extended search capabilities to search all scanned and indexed PDF documents. The search criteria for scanned files allow users to define the date, operator, or title. The search criteria for indexed files allow users to define the date, operator, title, subject, author, or keyword.

A report catalog is available for all documents scanned, PDF files documents indexed, and document management sessions.

R:Archive includes database maintenance to keep a system running smoothly. A table analysis can be performed on each table, and if required, users can pack the table. Additional maintenance includes packing the indexes and a database backup routine. Users can even review the User Access and Session Log Tables.

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First Edition

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R:Archive X.5 Enterprise
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1.4   Complimentary Technical Support

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2. To have operating system, workstations, and local network installed and functional. RBTI will NOT be responsible for resolving issues not pertaining to the R:BASE program.

3. Our support staff deals with advanced issues, therefore the person contacting RBTI for assistance should be the system administrator or have other R:BASE/SQL experience and be able to understand and implement the advice given.

4. To have the database(s) being converted, safely backed-up before attempting conversion process. RBTI will NOT be held responsible for lost data or corruption as a result of advice given.

5. Once converted, Licensee is responsible for updating command syntax in APPLICATIONS, altering FORMS and REPORTS to accommodate the 4 digit year function, and other changes as necessary.

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Part II
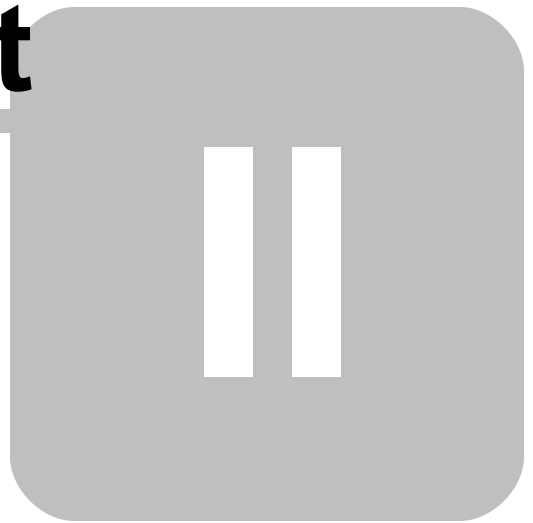
2 Installation

2.1 System Requirements

The following system specifications are recommended for the optimal use of R:BASE and R:BASE-related software.

Workstation Hardware

- 2-Core 2GHz+ CPU
- 2 GB of available RAM (4 GB recommended)
- 2 GB of available hard disk space
- 1024x768 or higher resolution video adapter and display
- Standard mouse or compatible pointing device
- Standard keyboard

Server Hardware

- 2-Core 2GHz+ CPU
- 6 GB of available RAM (8 GB recommended)

Operating System

- Microsoft Windows 10 (Professional)
- Microsoft Windows 8 (Professional)
- Microsoft Windows 7
- Microsoft Windows Server 2019
- Microsoft Windows Server 2016
- Microsoft Windows Server 2012, 2012 R2
- Microsoft Windows Server 2008, 2008 R2

Network

- Ethernet infrastructure (Gigabit recommended)
- Internet connection recommended, but not required, for license activation, updating, & support
- Anti-virus programs should exclude the R:BASE program and database files

Part III
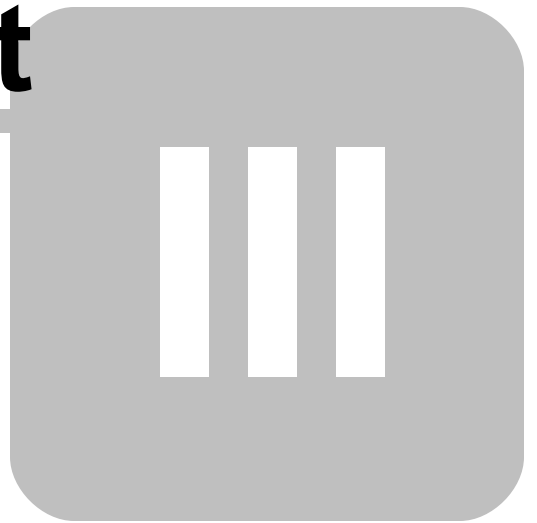
3   Software Installation

The installation of R:Archive X.5 Enterprise is fully automated and does not require user intervention for the initial setup.

Run the installer ".exe", provided by download, while physically sitting at the workstation to begin the installation process, and read the installer screens for licensing and other information as the program installs.

Installation Directory

    C:\RBTI\RArchiveX5E

Files Installed

    RArchive.rx1
    RArchive.rx2
    RArchive.rx3
    RArchive.rx4
    RArchive.dat
    RBASE.dat
    RArchiveX5.rbm
    RArchiveX5E.chm
    RArchiveX5E.pdf
    RTwain2PDFX5.chm
    License.rtf
    Readme.txt
    StartAllOver.rmd

Requirements:

Plugin
The R:Archive X.5 Plugin file (RArchiveX5.rbm) and help reference (RTwain2PDFX5.chm) must be placed in the R:BASE X.5 Enterprise program directory or the runtime/compiled application directory.

R:BASE Version	Default Program Directory
X.5 Enterprise (Version 10.5)	C:\RBTI\RBGX5E

Desktop Shortcut
Create a desktop shortcut for the R:Archive program. For the desktop shortcut icon that will run this application, a custom "Target:" and "Start in:" must be used as follows:

Target: C:\RBTI\RBGX5E\RBGX5E.exe RArchive.dat
Start in: C:\RBTI\RArchiveX5E

When launching the application, the log in prompt screen will be displayed. The following profile may be used to access R:Archive:

Login: admin
Password: admin

To access the R:BASE development interface and Security table, the password is: RArchive

Part IV

4   Using R:Archive

4.1   Quick Start to Archiving

Here's the minimum info users need to set up R:Archive and begin scanning. First, launch R:Archive from the desktop icon. For your appropriate Login and Password, contact your network database administrator*****.

1. **Apply Settings**
    From the R:Archive menus, choose "Set Default Scanner" from under "Scan and Index Documents".
    The R:Archive program will appear for users to set the default scanner for scanning documents. Choose "File" > "Select Source..." from the Menu Bar to display a list of available sources. Select your source, click the "Select" button and close the window.

2. **Setup Session**
    Choose "Current Session Settings" from under "Scan and Index Documents".

    A.   The default folder for scanned documents is the **SCANS** subdirectory within the R:Archive
         installation directory (default: C:\RBTI\RArchiveX5E).
    B.   Define the file prefix for all scanned documents. The default value is "**RA_**".
    C.   If users require the capturing of the scanned data, select **OCR**.

    For additional information on OCR or any other settings, visit Current Session Settings.

3. **Start Scanning**
    Now, you can begin scanning your document. For this first scan, we'll use the "Scan Document (Automatic)" menu option. The scanner software will launch your scanned document prompting you to accept the scan. You may be force to preview the scan first.

R:BASE Document Management System

R:Archive - Scanned File Details

Document ID: 10000002

Date/Time: 10/22/2015   16:19:57

Operator: John Minyo II

File Path

C:\RBTI\RArchiveXE\SCANS\RA_10222015_1619.PDF

Title

License Agreement

Notes

License

View   Done

4.   **Save Document Information**

After accepting the scanned document, a window will appear displaying the document identification number, date, time, operator, and file path. The document Title and Notes can now be added for additional document descriptions. The file can also be viewed by selecting the "View" button. Choose "Done" when you are finished.

All users will have full access until the administrator sets up user accounts. The Custom EEP to prevent/allow users full access is located in the form "RArchiveLoginScn" within the "Login" button.

4.2 Scan and Index Documents

4.2.1 Set Default Scanner

This menu option launches the R:Twain2PDF program interface and allows you to select one of your available scanners or TWAIN devices.

To choose a TWAIN source, users can perform either of the following options:

- select the "Select Source..." button from the Tool Bar
- choose "File" > "Select Source..." from the Menu Bar

The following dialog will be displayed with a list of TWAIN sources.
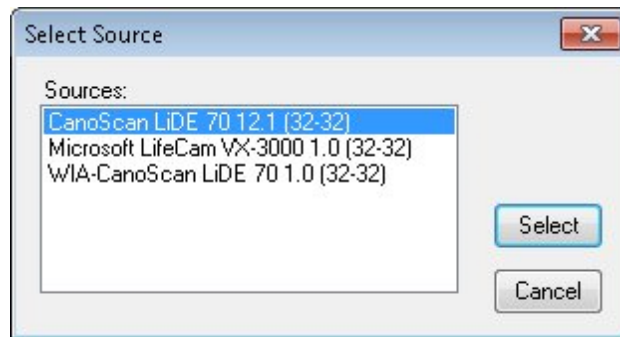
4.2.2 Current Session Settings

This menu option defines the folder on a computer where scanned documents will reside, the file prefix for all scanned documents, and any OCR settings, if defined.

Session Folder:
Displays the current session folder location. To create or change the session folder, choose the "Change Folder" button. A menu will launch allowing users to select a folder location on a computer. Select the "Done" button when finished.

File Prefix:
Displays the file prefix for scanned documents. The default file prefix is "RA_". To alter the file prefix, type over the existing value. Select the "Done" button when finished.
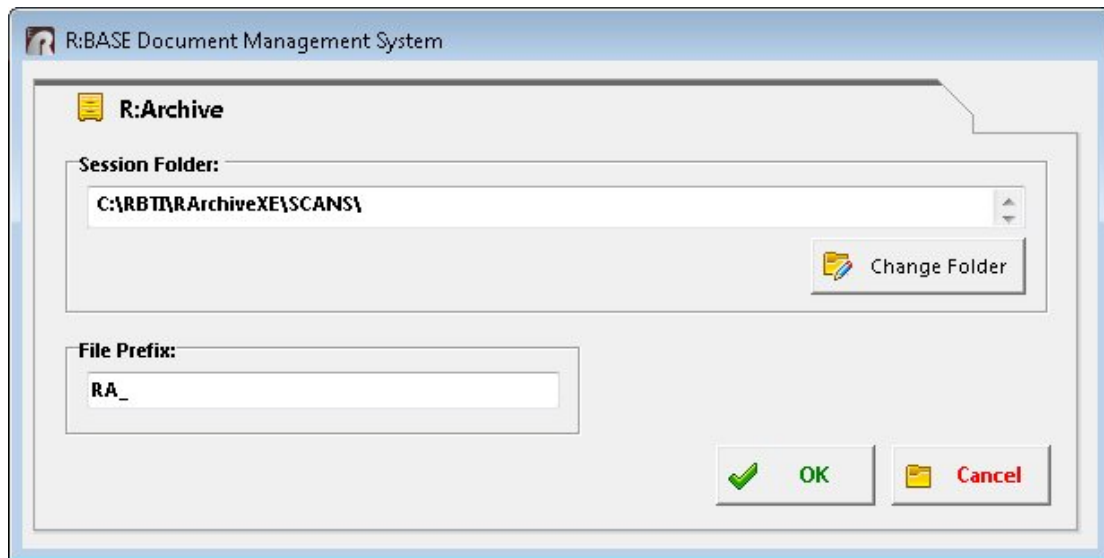
4.2.3   Scan Document (Automatic)

The "Scan Document (Automatic)" menu option will launch a scanner and begin scanning documents. The Scan File Details dialog will open displaying the Document ID, Date, Time, Operator, and File Path.

The scanned document "Title" and "Notes" fields are editable for users to add information. The scanned document can be viewed by selecting the "View" button.
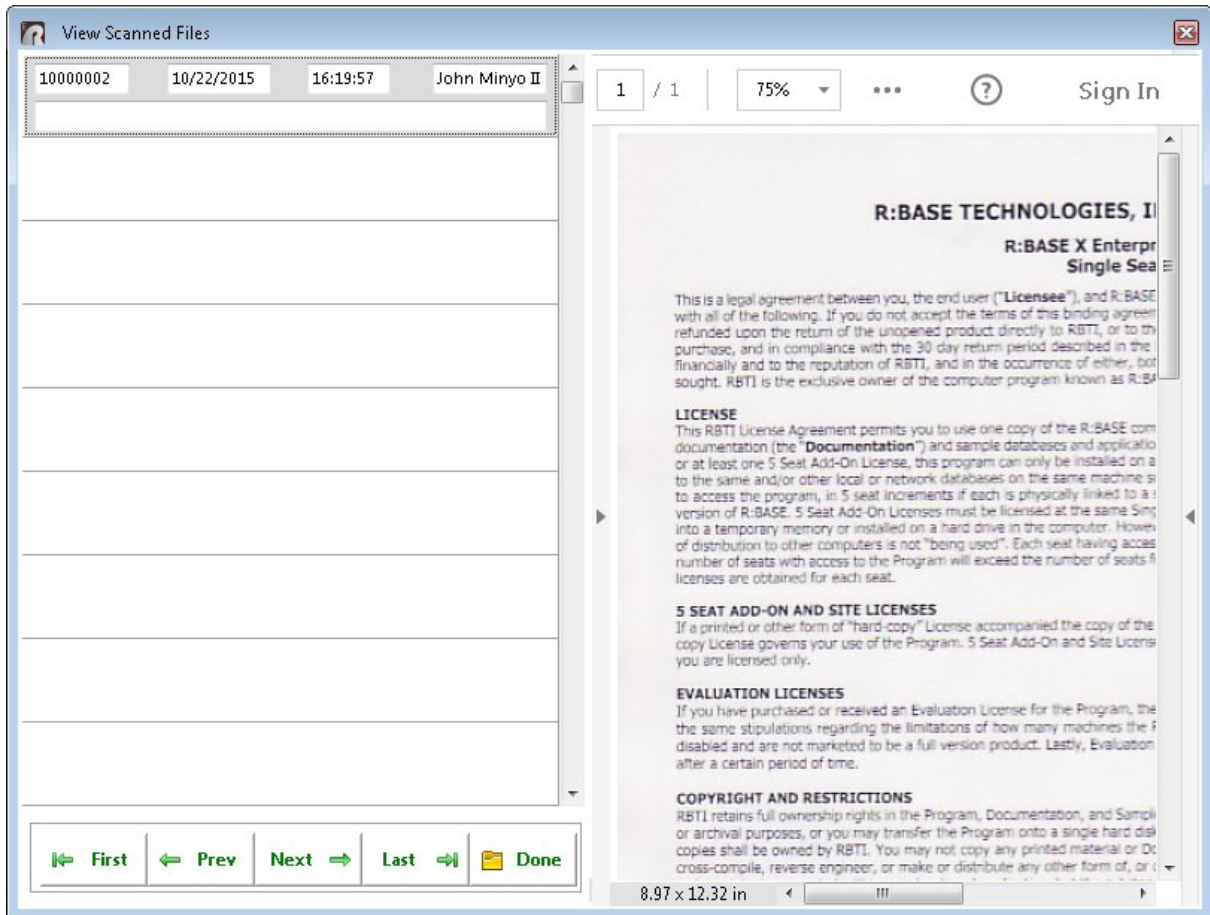
4.2.4   Scan Document (Manual)

The "Scan Document (Manual)" menu option will launch a scanner software for users to begin scanning documents. The available options would be subjected to the software provided with a scanner.

The Scan File Details dialog will open displaying the Document ID, Date, Time, Operator, and File Path.

The scanned document "Title" and "Notes" fields are editable for users to personally add information. The scanned document can be viewed by selecting the "View" button.

4.2.5 View Scanned Documents

The "View Scanned Documents" option will open a dialog window displaying a list of scanned documents. For each selected scanned document within the left panel, the scanned image will appear on the right panel. The buttons across the bottom allow users to move easily throughout all the scanned documents.
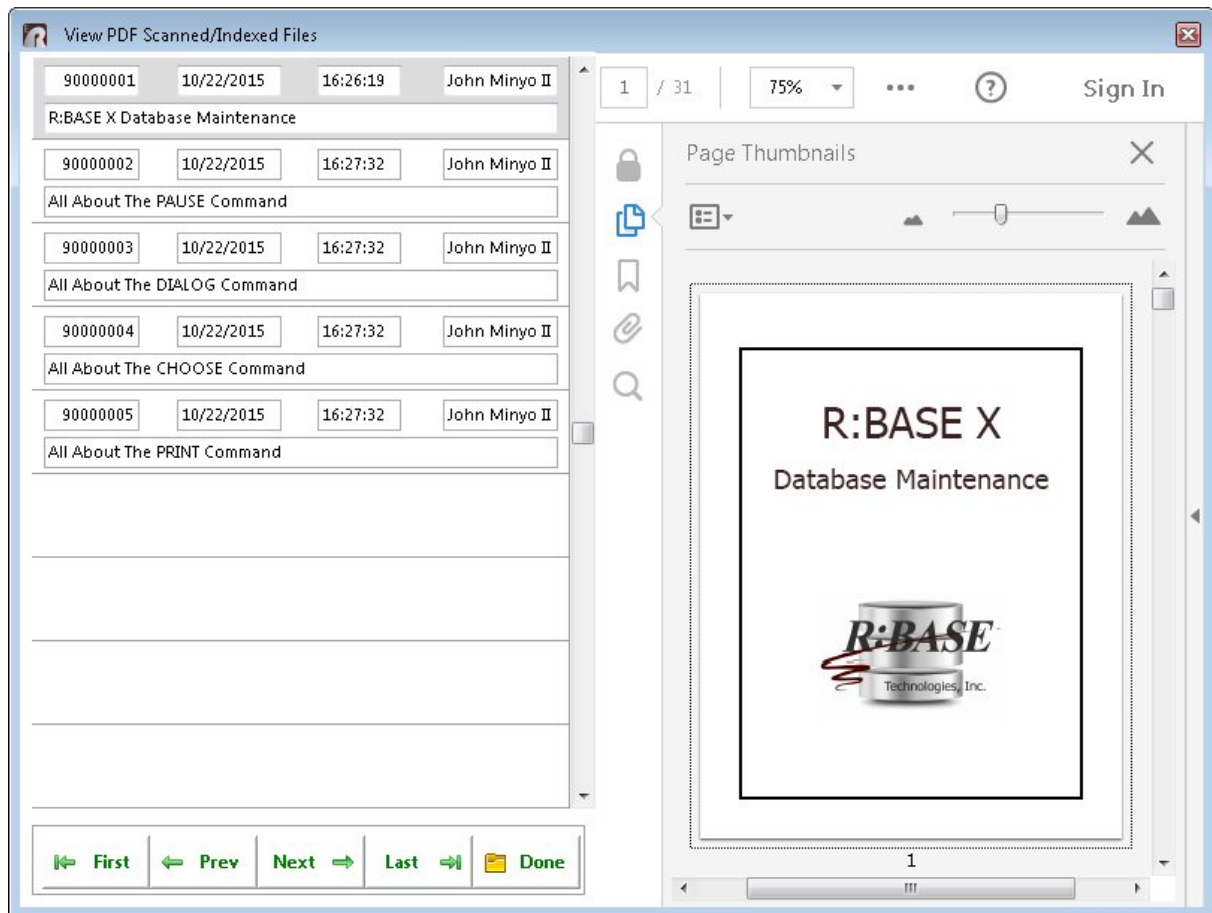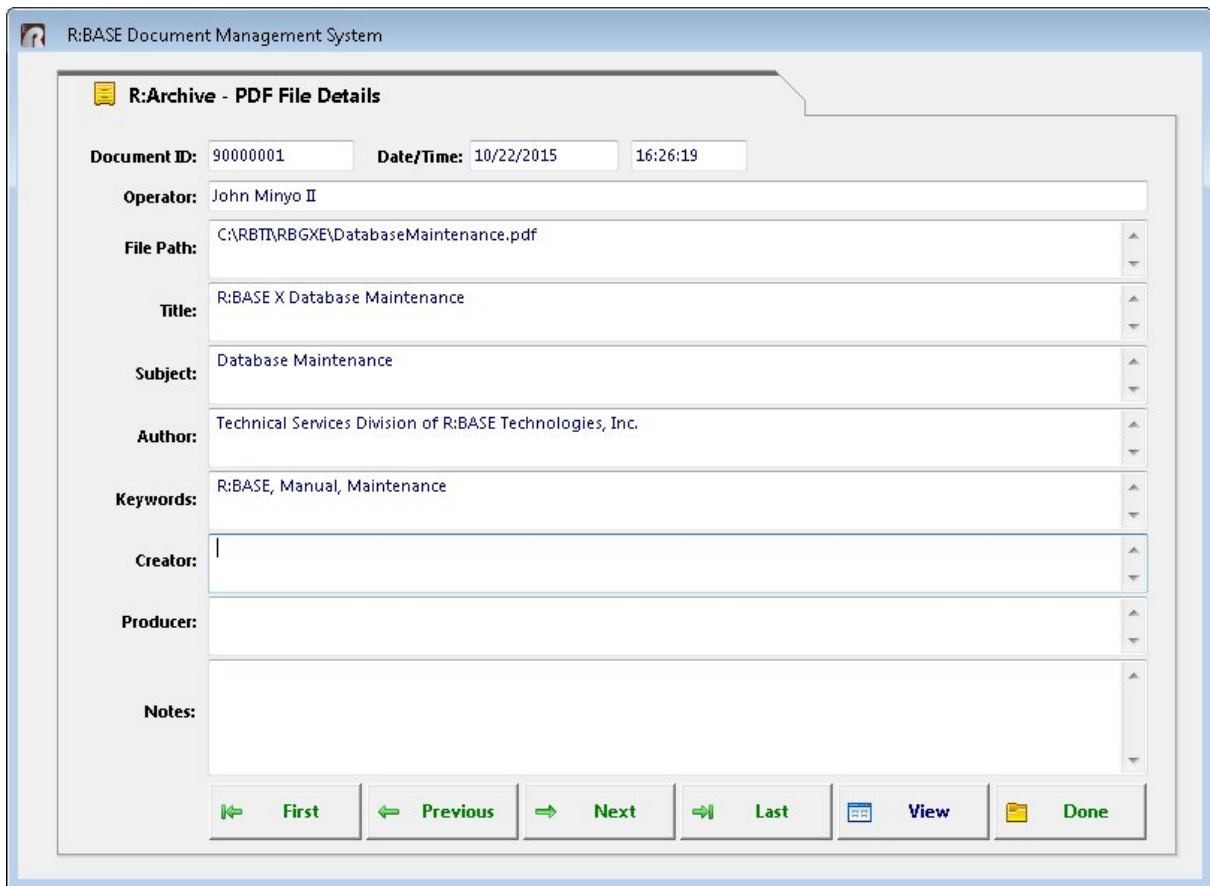
4.3 Manually Index Documents

4.3.1 Select and Index PDF Document(s) - One

The "Select and Index PDF Document(s) - One" menu option allows users to search a computer for a single PDF file to index with the R:Archive. This allows users to store a document ID, date and time, operator, file location, title, subject, author, keywords, creator, producer, and notes for the PDF file. Storing this information in R:Archive allows users to perform a more accurate file search on a computer for future references.

The buttons across the bottom allow users move from file to file, when more PDF files are selected, as well as view the PDF document.

The indexed document can be viewed by selecting the "View" button.

4.3.2 Select and Index PDF Document(s) - Multiple

The "Select and Index PDF Document(s) - Multiple" menu option allows users to search a computer for a multiple PDF files to index with the R:Archive. This allows users to store a document ID, date and time, operator, file location, title, subject, author, keywords, creator, producer, and notes for the PDF files. Storing this information in R:Archive allows users to perform a more accurate file search on a computer for future references.

The buttons across the bottom allow users move from file to file, as well as view the PDF document.
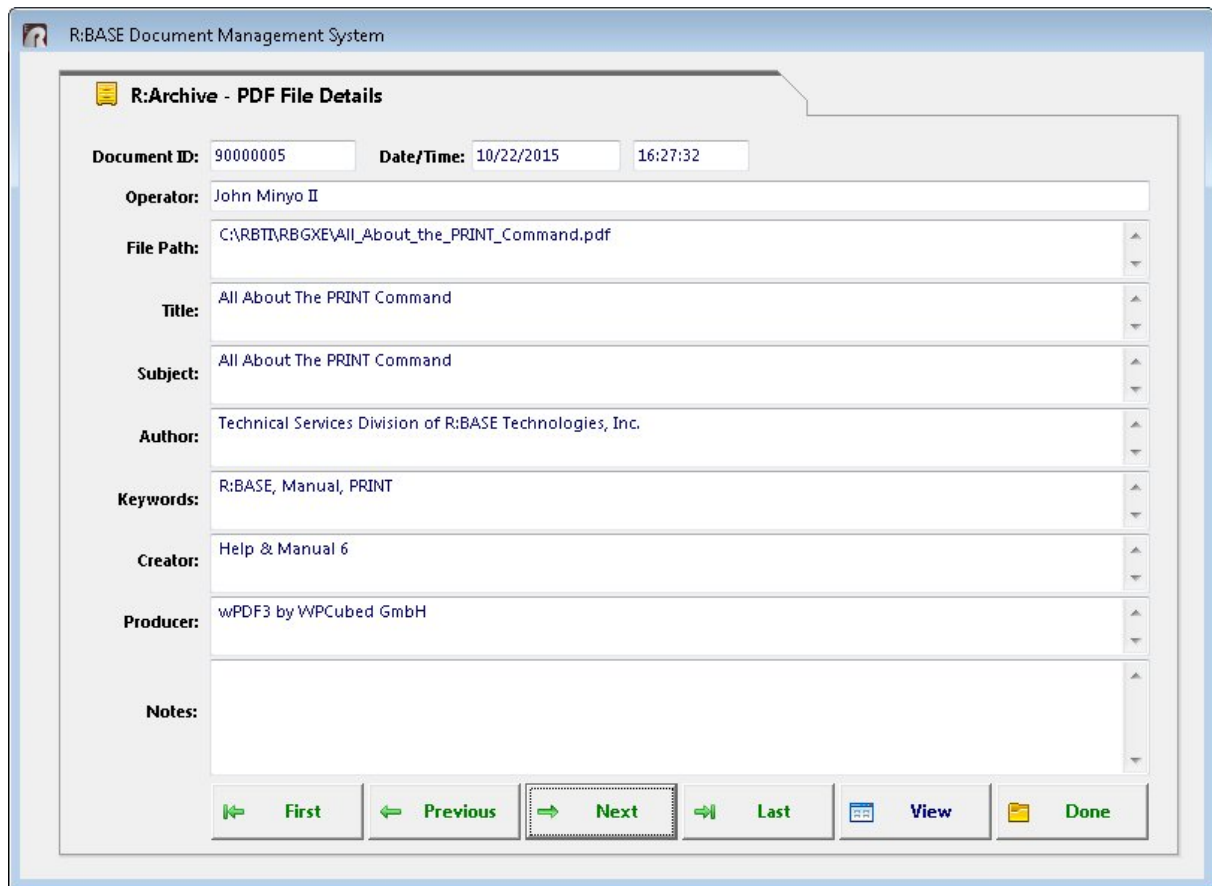
The indexed documents can be viewed by selecting the "View" button.

4.3.3   View PDF Document(s)

The "View PDF Document(s)" menu options displays the list of indexed PDF documents stored within R:Archive. This window displays the document ID, date, time, user, and name, and viewer of the PDF document. Based on a user's PDF Reader settings, the viewer may display the PDF document differently.
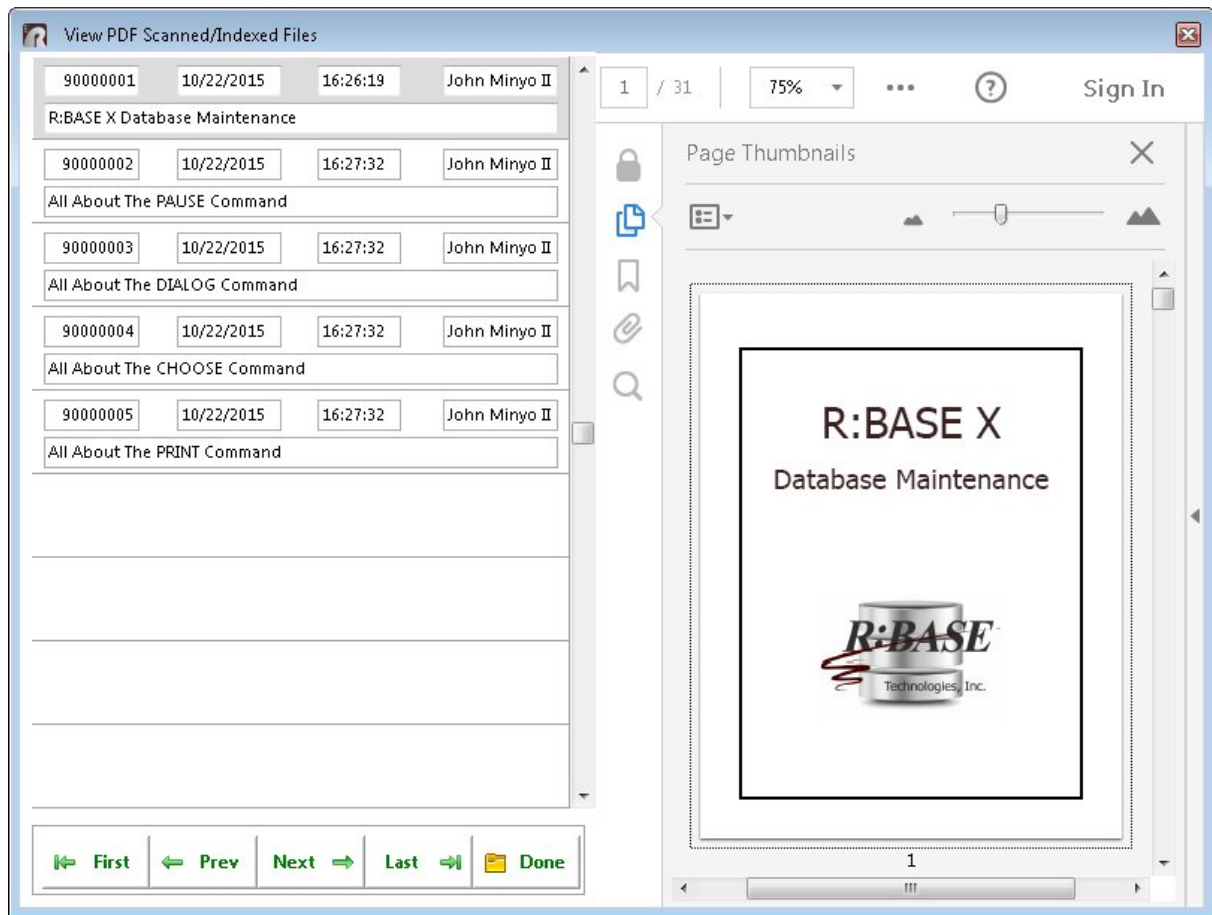
4.4 Search Documents

4.4.1 Search Scanned Documents

The "Search Scanned Documents" menu option allows users to search for scanned documents within R:Archive. The search criteria options include "Document Date", "Document Operator", and "Document Title".
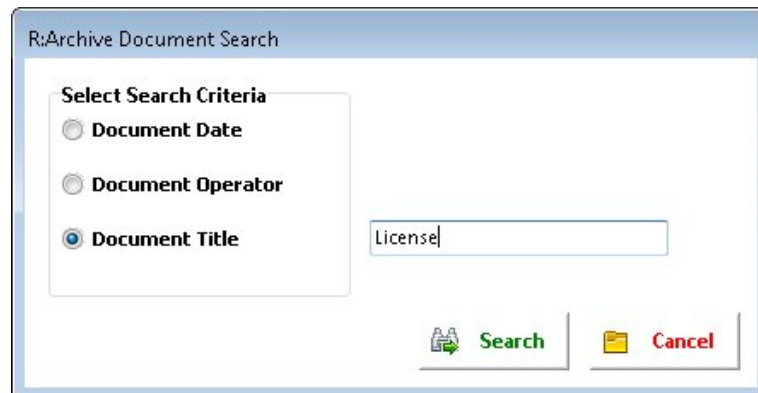

When the document search returns a list of documents, the "View Scanned Files" window will display the list of scanned documents, which match the search criteria.
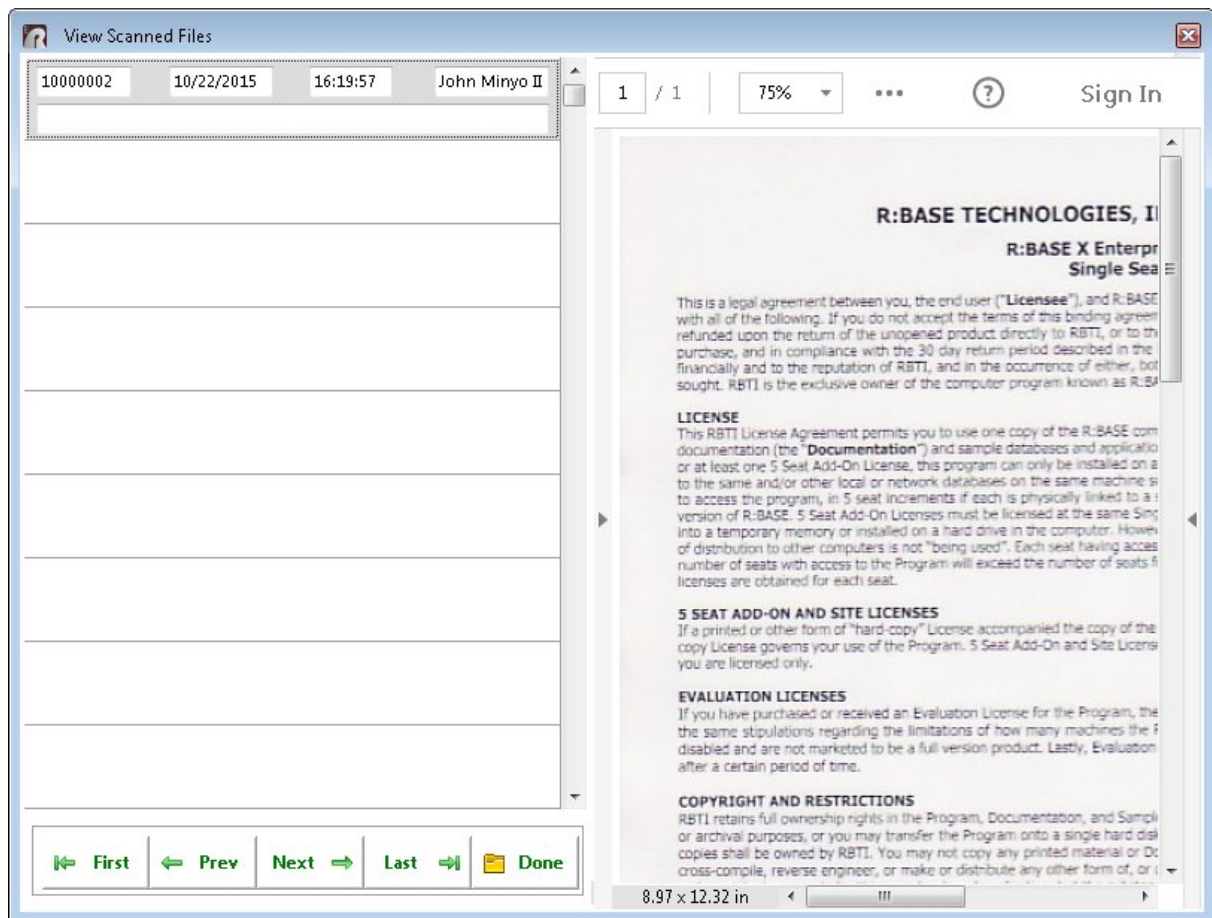
4.4.2   Search PDF Documents

The "Search PDF Documents" menu option allows users to search for indexed PDF documents within R:Archive. The search criteria options include "Document Date", "Document Operator", and "Document Title", "Document Subject", "Document Author", and "Document Keywords".
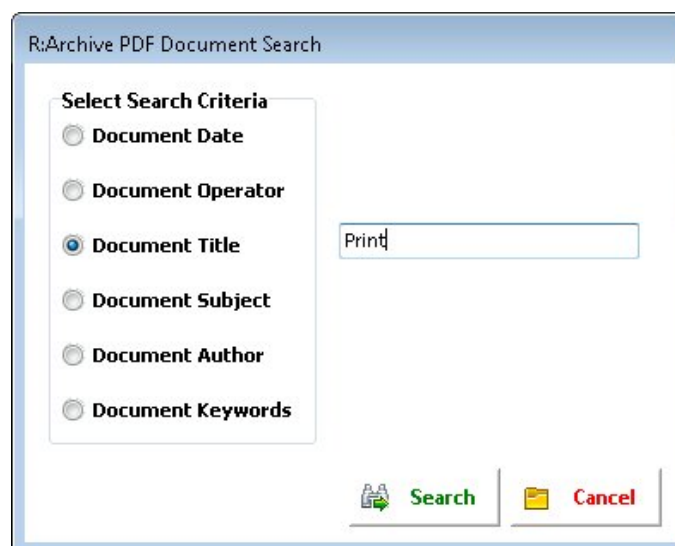
When the document search returns a list of documents, the "View PDF Scanned/Indexed Files" window will display the list of scanned and or indexed PDF documents, which match the search criteria.
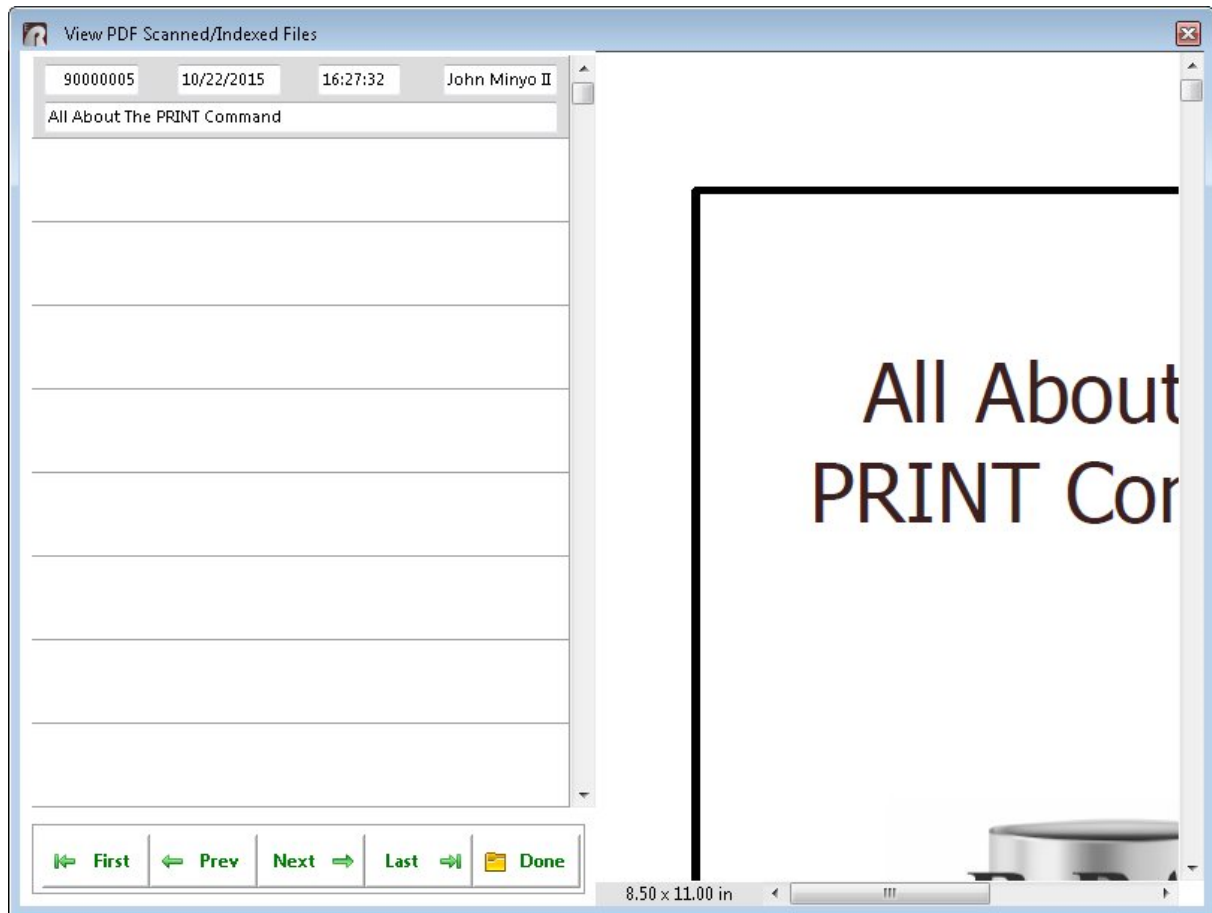
4.5 PRINT Catalog

4.5.1 Print Scanned Documents Catalog

The "Print Scanned Documents Catalog" will print a report to the screen displaying a Master File Catalog of scanned documents.
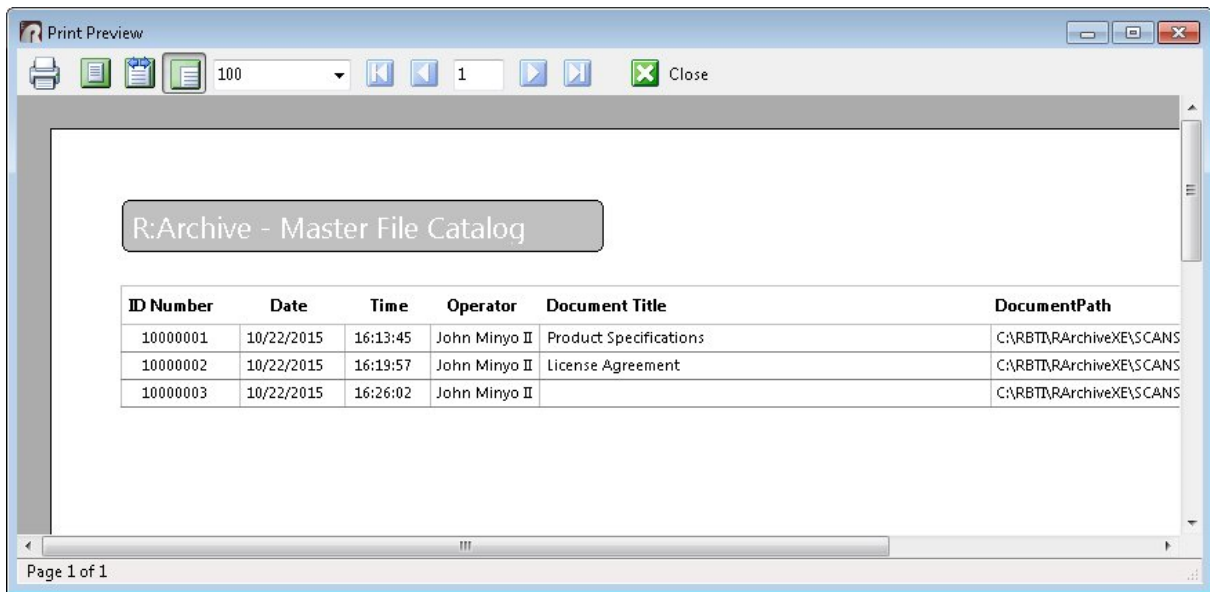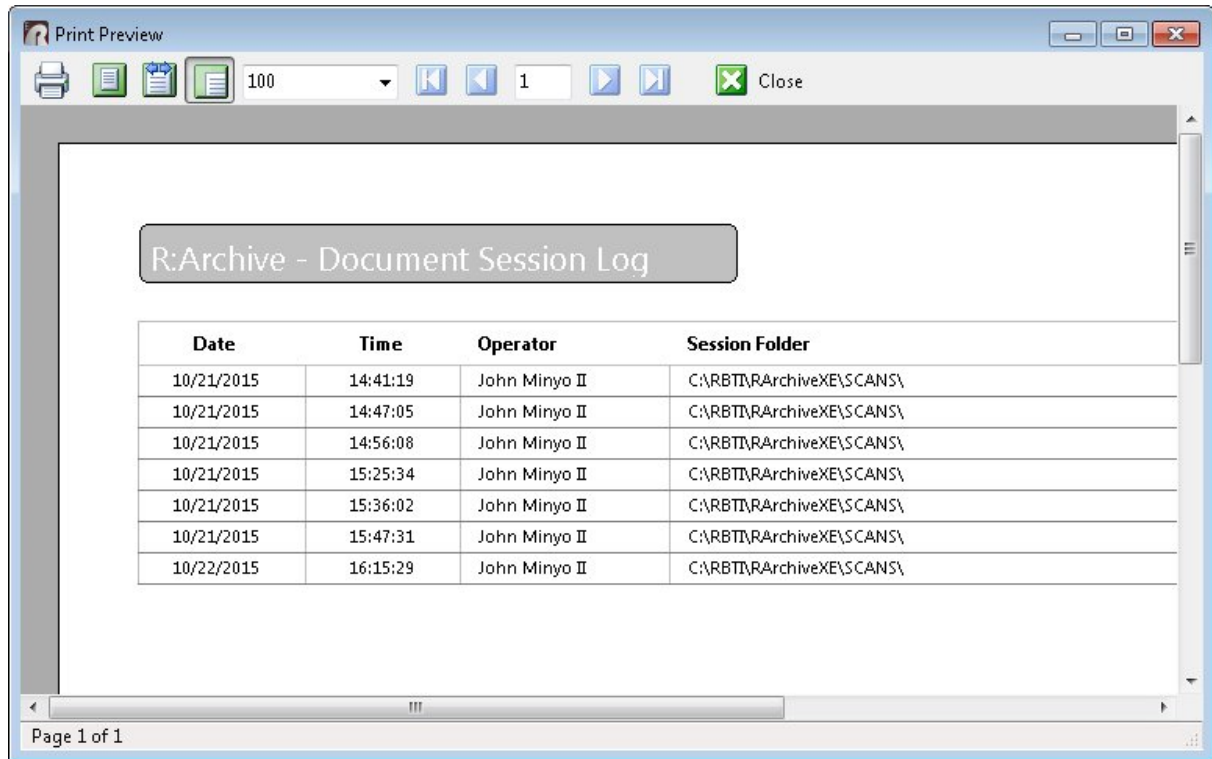
4.5.2 Print PDF Documents Catalog

The "Print PDF Documents Catalog" will print a report to the screen displaying a Master PDF Documents Catalog of PDF documents.
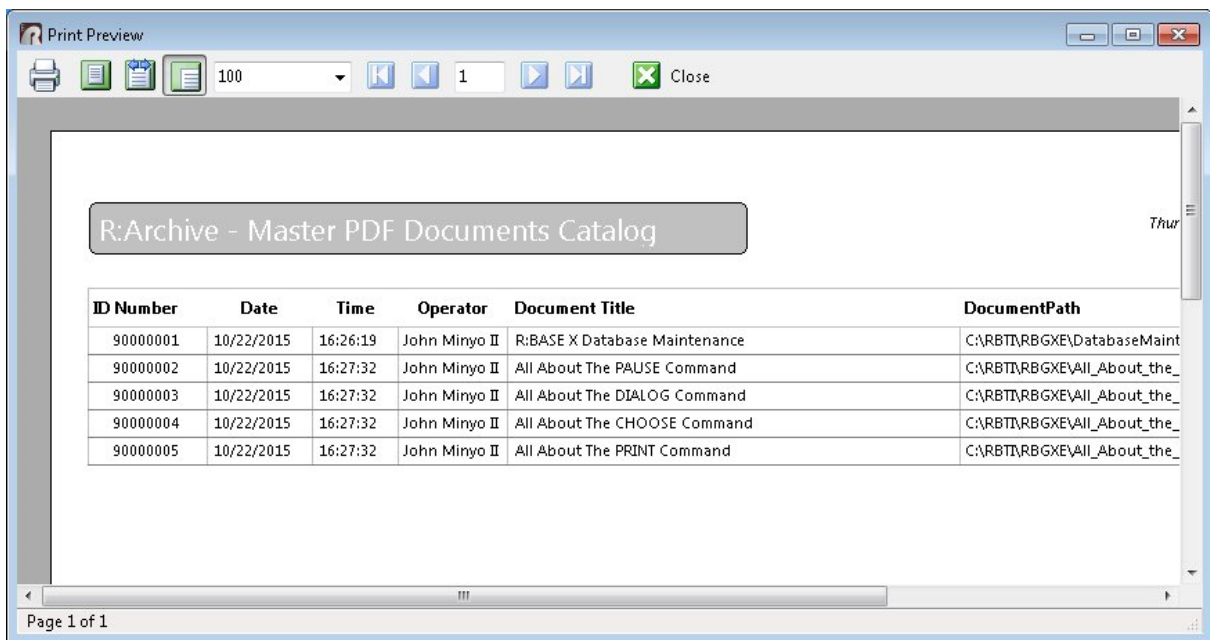
4.6 System Reports

4.6.1 Document Session Log

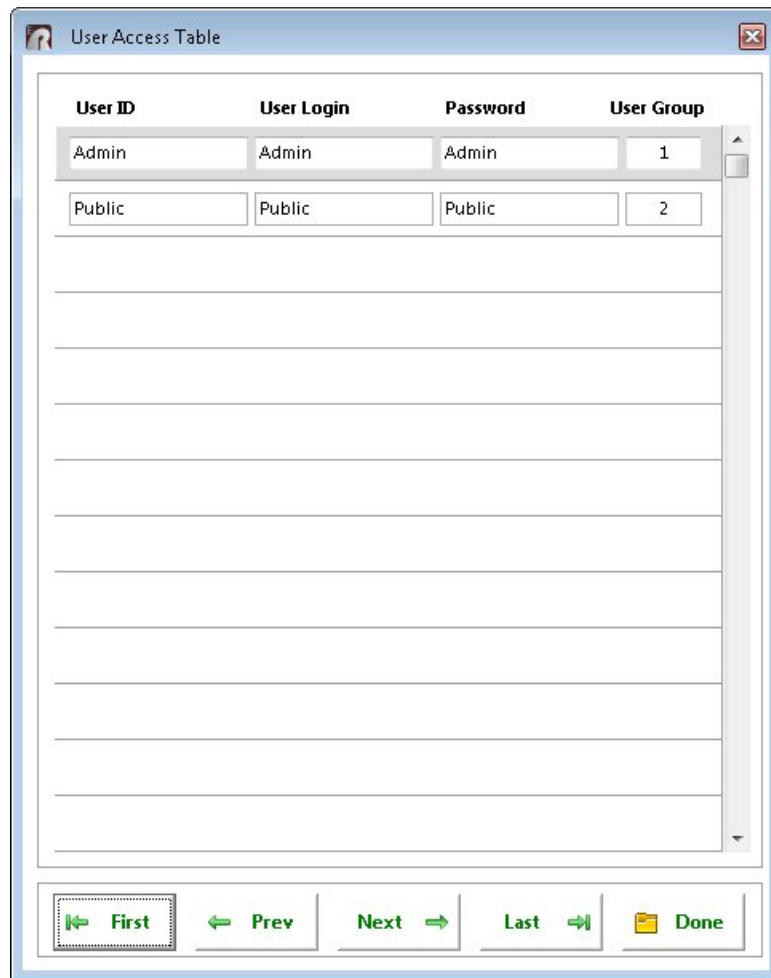The "Document Session Log" menu option will display the R:Archive Document Session Log.

4.7 Database Maintenance

4.7.1 Review User Access Table

The "Review User Access Table" menu option will display the "User Access Table" information. The window displays the User ID, User Login, Password, and User Group of the users. The default password is "RArchive".
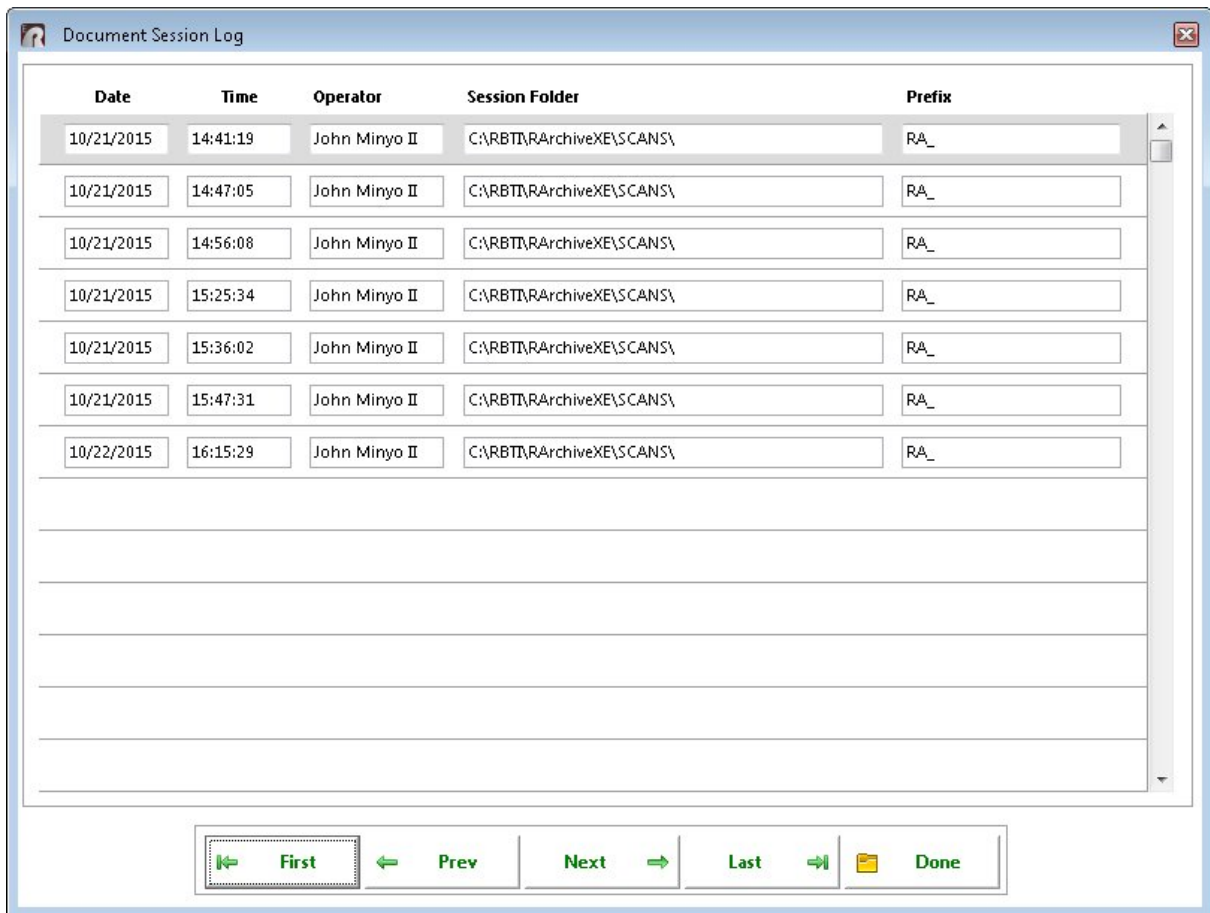
4.7.2 Review Session Log Table

The "Review Session Log Table" menu option launches the complete R:Archive Document Session Log. The window displays the date, time, operator, session folder, and file prefix.
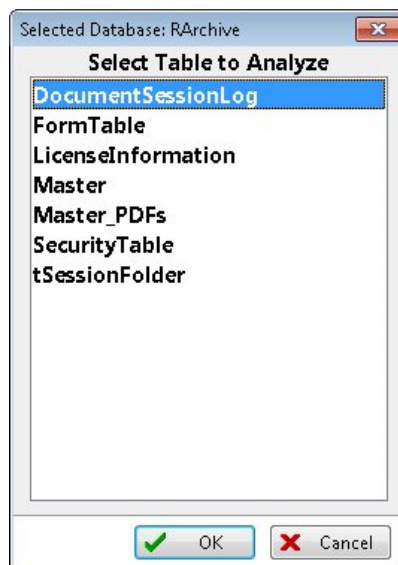
4.7.3 Table Analysis

The "Table Analysis" menu option will allow users to choose and analyze any of the available R:BASE tables in R:Archive. First, choose a table from the list to analyze.

Then, R:Archive will analyze and display the table information. The "Utilization" should be higher than 50%. Otherwise, it is recommended that users Pack the table.

4.7.4   Pack Table

The "Pack Table" menu option will allow users to pack (or compress) any of the available R:BASE tables in R:Archive. First, choose a table from the list to pack.
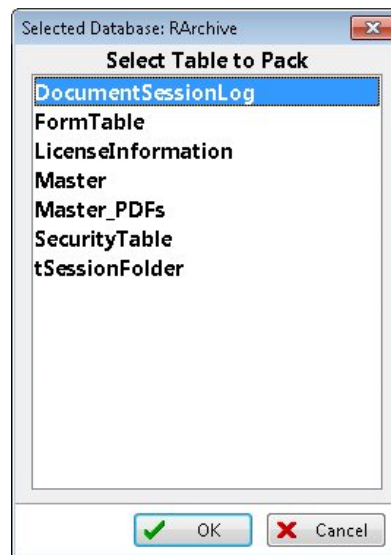
Then, R:Archive will compress the table and display a completion message.

4.7.5   Pack Indexes

The "Pack Indexes" menu option will allow users to pack (or compress) the R:BASE table indexes within R:Archive. This allows for faster processing when searching for documents.

4.7.6   Backup Entire Database

The "Backup Entire Database" menu option will backup the database structure and data. First, users will be prompted to select a folder to place the backup files.
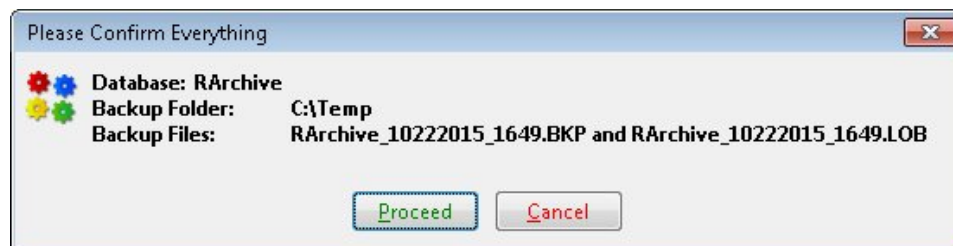
After the backup is complete, a message will be displayed with a confirmation. Two files will be placed in the specified folder with the naming convention including the date and time of the backup.

4.8   Help

The "Help" menu option displays the R:Archive in-line help documentation.

4.9   About R:Archive

The "About R:Archive" will display current information about the product such as the version of R:Archive, the version and build of R:BASE, contact, and license information.

4.10   Exit

4.10.1 Exit R:Archive

The "Exit R:Archive" menu option closes R:Archive and returns users to the operating system.

4.10.2 Switch to R> Prompt

The "Switch to R> Prompt" menu option will close R:Archive and drop users to the R:BASE development level.

For the password, refer to the ReadMe.TXT file.

Part V

5   Technical Support

Please read over this inline HELP documentation at least once before seeking support for this product. We have worked very hard to make this help file clear and useful, but concise. There's a lot of power here so we suggest you reread these instructions once you have become accustomed to using R:Archive. New uses will become apparent.

If you have further question(s) about R:Archive, and can't find the answer(s) in this help documentation, you can obtain information from a variety of sources:

*   E-mail our Technical Support Department at: support@rbase.com
*   Access the R:BASE Technologies Support Home Page on the World Wide Web at http://www.rbase.com/support.
*   Call our Technical Support Department at (724) 733-0053 Monday through Friday, 10:00 AM to 6:00 PM (EST). You should be at your computer with R:Archive running and ready to make changes suggested by our technical staff. You may be required to purchase a technical support plan. Several support plans are available to suit the needs of all users. Available Technical Support Plans

Please be prepared to refer to the following:

*   The technical support registration number, which is located on the registration card included with this product. If you purchased this product directly from R:BASE Technologies, your technical support registration number can be found on your invoice or packing sheet.
*   The type of hardware and operating system you are using.
*   Details regarding your operating environment, such as available memory, disk space, your version of R:Archive, local area network, special drivers, related database structures, application files, and other files that are used or accessed by your application.

All of the information that you provide us is used to better and more expeditiously assist you.

R:BASE Technologies has a number of different services available for R:BASE products. As a registered user, you will receive information about new releases of R:Archive and other R:BASE Technologies products. Please remember to register your R:BASE software as well as any other R:BASE related software. http://www.rbase.com/register/

Part VI

6 Feedback

Suggestions and Enhancement Requests:

From time to time, everyone comes up with an idea for something they'd like their software to do differently.

If you come across an idea that you think might make a nice enhancement, your input is always welcome.

Please submit your suggestion and/or enhancement request to the R:BASE Developers' Corner Crew (R:DCC) and describe what you think might make a nice enhancement. In R:BASE, the R:DCC Client is fully integrated to communicate with the R:BASE development team. From the main Menu Bar, choose "Help" > "R:DCC Client". If you do not have a login profile, select "New User" to create one.

If you have a sample you wish to provide, have the files prepared within a zip archive prior to initiating the request. You will be prompted to upload any attachments during the submission process.

Unless additional information is needed, you will not receive a direct response. You can periodically check the status of your submitted enhancement request.

If you are experiencing any difficulties with the R:DCC Client, please send an e-mail to rdcc@rbase.com.

Reporting Bugs:

If you experience something you think might be a bug, please report it to the R:BASE Developers' Corner Crew. In R:BASE, the R:DCC Client is fully integrated to communicate with the R:BASE development team. From the main Menu Bar, choose "Help" > "R:DCC Client". If you do not have a login profile, select "New User" to create one.

You will need to describe:

- What you did, what happened, and what you expected to happen
- The product version and build
- Any error messages displayed
- What computer operating system is in use
- Anything else you think might be relevant

If you have a sample you wish to provide, have the files prepared within a zip archive prior to initiating the bug report. You will be prompted to upload any attachments during the submission process.

Unless additional information is needed, you will not receive a direct response. You can periodically check the status of your submitted bug.

If you are experiencing any difficulties with the R:DCC Client, please send an e-mail to rdcc@rbase.com.

Part VII

7 Useful Resources

. R:BASE Home Page: http://www.rbase.com

. Up-to-Date R:BASE Updates: https://www.rbaseupdates.com/

. Current Product Details and Documentation: http://www.rbase.com/rbgx/

. Support Home Page: http://www.rbase.com/support/

. Product Registration: http://www.rbase.com/register/

. Official R:BASE Facebook Page: http://www.facebook.com/rbase/

. Sample Applications: http://www.razzak.com/sampleapplications

. Technical Documents (From the Edge):   http://www.razzak.com/fte

. Education and Training: http://www.rbase.com/training

. Product News: http://www.rbase.com/news

. Upcoming Events: http://www.rbase.com/events

. R:BASE Online Help Manual: http://www.rbase.com/support/rsyntax

. Form Properties Documentation: http://www.rbase.com/support/FormProperties.pdf

. R:BASE Beginners Tutorial: http://www.rbase.com/support/rtutorial

. R:BASE Solutions (Vertical Market Applications):   http://www.rbase.com/products/rbasesolutions/

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