

SimplArchive

User Manual

An enterprise-grade document management system
— the web workbench and the desktop client

© 2026
Hebel Consulting GmbH
Schweighofplatz 7
6010 Kriens (LU)
Switzerland
support@simplarchive.dev

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1 Introduction

SimplArchive is a multi-tenant **document management system** (DMS): a secure archive where an organisation files, versions, classifies, searches, and governs its documents. It is a showcase of how a senior, AI-driven software developer can produce a complex, enterprise-grade system in a relatively short period — every feature in this manual is really implemented and really tested.

You reach the same archive through **two clients**, which mirror each other feature for feature:

- the **web workbench** — a browser application, nothing to install;
- the **desktop client** — a native Windows / macOS / Linux application that can additionally open a document in its real desktop program and drag documents in and out of the operating-system file manager.

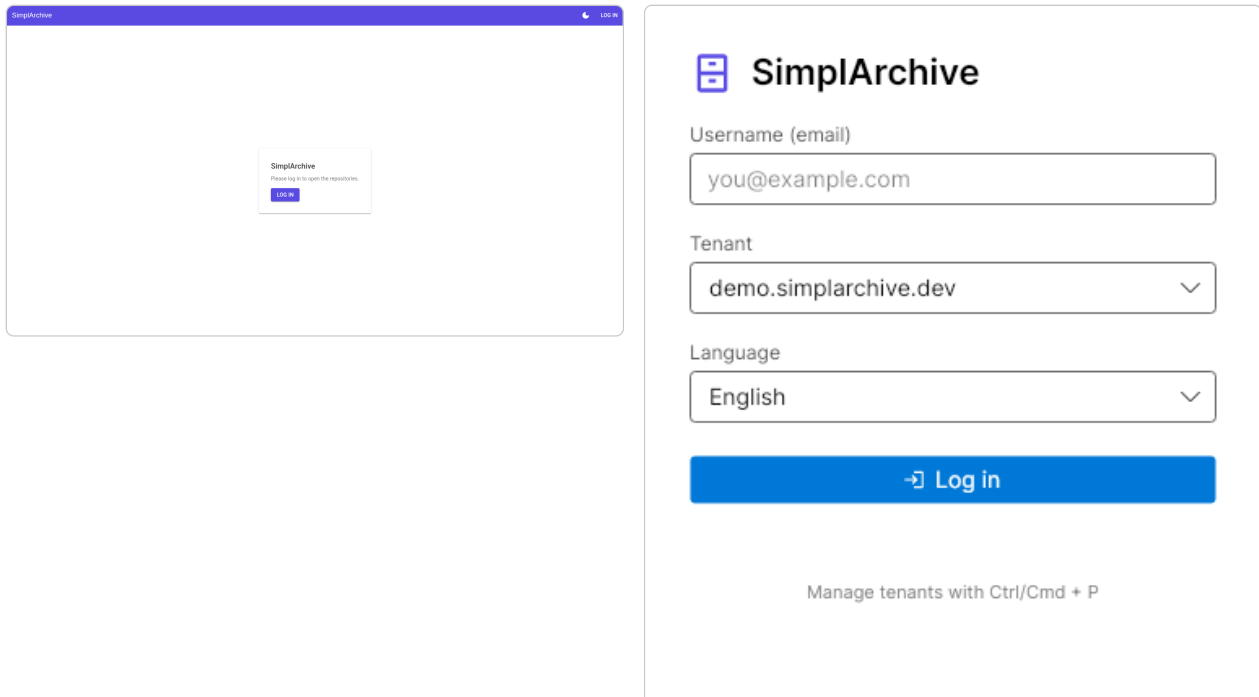


Figure 1: The two clients: the web sign-in (left) and the desktop logon window (right).

1.1 Core concepts

Repository — a top-level archive; it is simply a folder with no parent. **Folder / document** — the tree inside a repository. **Version** — every change to a document's file is kept as a new version; nothing is overwritten. **Mask (document type)** — a template of **index fields** (metadata) attached to a document. **ACL** — a per-document access-control list of **rights** (see, read, edit, ...) granted to users and groups.

2 Getting started

Signing in. Open the web client and choose **Log in**, or start the desktop client and use its logon window; enter your e-mail and password. Your organisation may additionally require a second factor (a one-time code or a passkey). You can pick the interface **language** (English, German, Italian, Spanish) and switch between a **light** and **dark** appearance at any time.

The workbench. After signing in you land on the **Repositories** workbench, laid out as: the **tree** of repositories and folders, the **contents** list of the selected folder, the **detail** pane (index data) over the **preview**, and — along the bottom — the **tab bar** that switches between Repositories, Inbox, Search, Tasks and the rest.

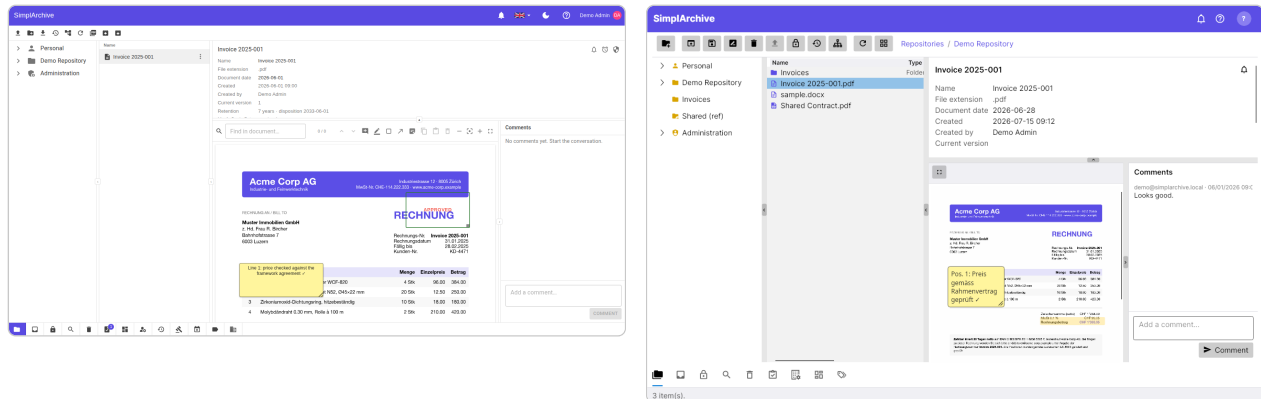


Figure 2: The workbench in the web client (left) and the desktop client (right): tree · contents · detail · preview, with the bottom tab bar.

3 Browsing & previewing documents

Expand the **tree** to a folder and its documents appear in the **contents** list, which you can sort by any column. Selecting a document shows its **index data** in the detail pane and renders a **preview** below — PDFs, images, and converted Office/e-mail/Markdown documents alike. Full-text search hits are highlighted directly on the preview, and you can click a word to copy it. In the desktop client you can also **open** the document in its native application.

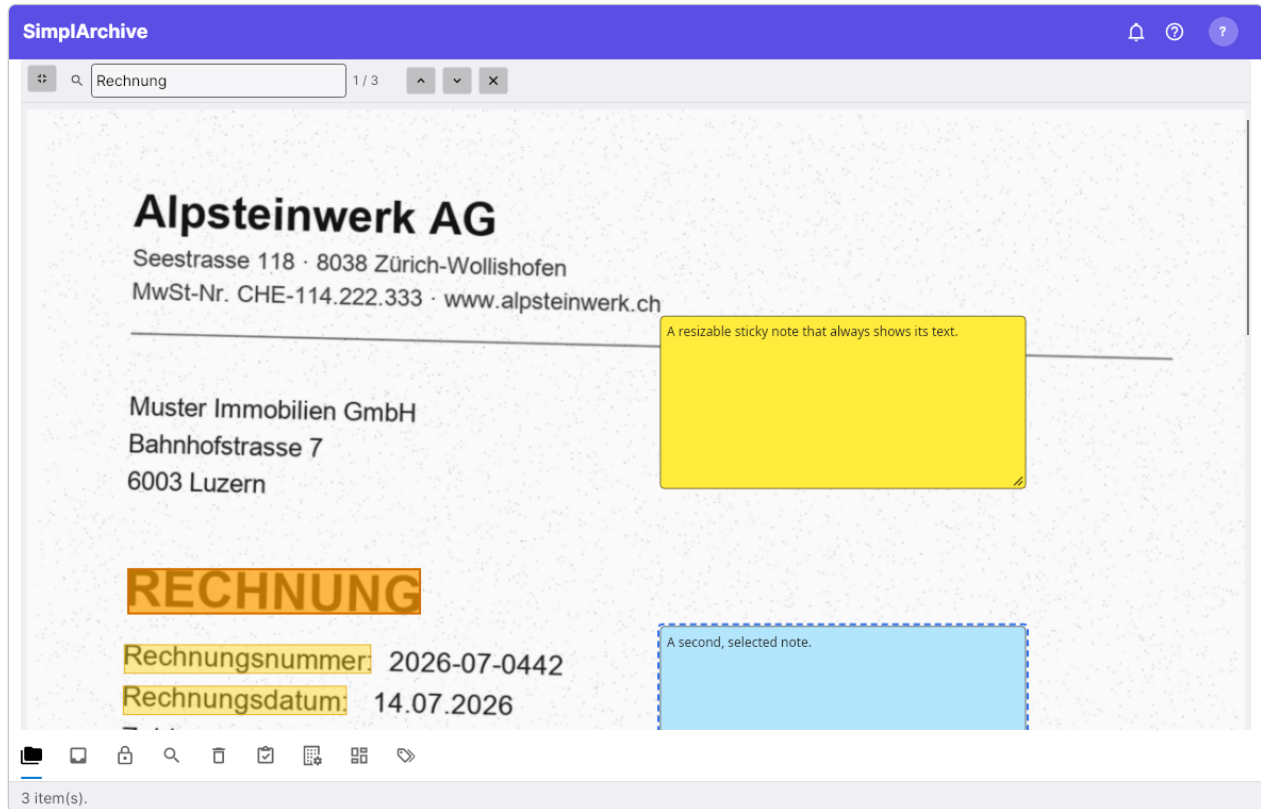


Figure 3: The preview with search hits highlighted on the page — click a word to copy it, or step through the matches.

4 Adding & versioning documents

Uploading. Drag a file straight onto a folder (the bytes go directly to object storage — the server never proxies them). **The Inbox** is a staging area: drop scans or files there, then classify each one (name, document type, index data) and **file** it into the archive.

Versions. Uploading a new file to an existing document adds a **version** — the history is preserved. The **Versions** dialog lists every version; you can compare two of them or **make current** an older one. When you upload a file that already exists, SimplArchive warns you of the **duplicate**.

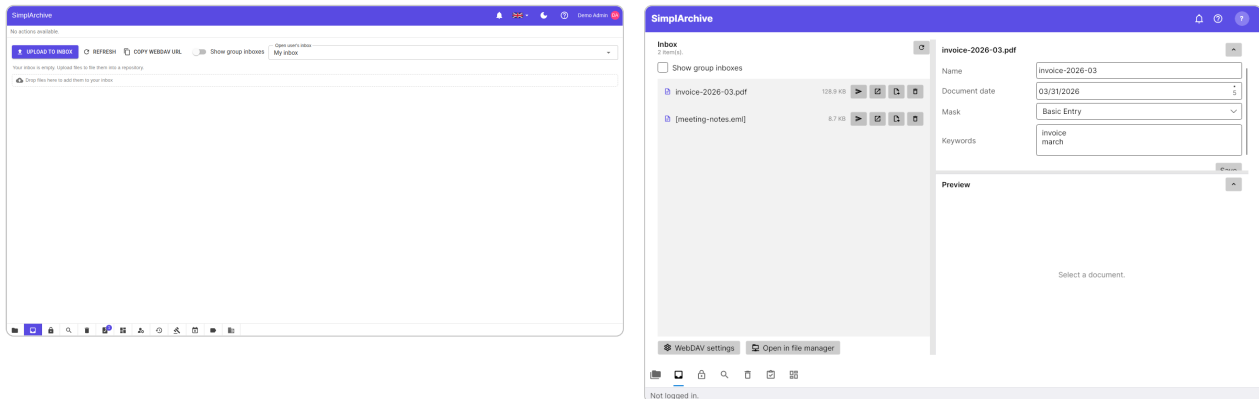


Figure 4: The Inbox: staged items waiting to be classified and filed, in the web (left) and desktop (right) clients.

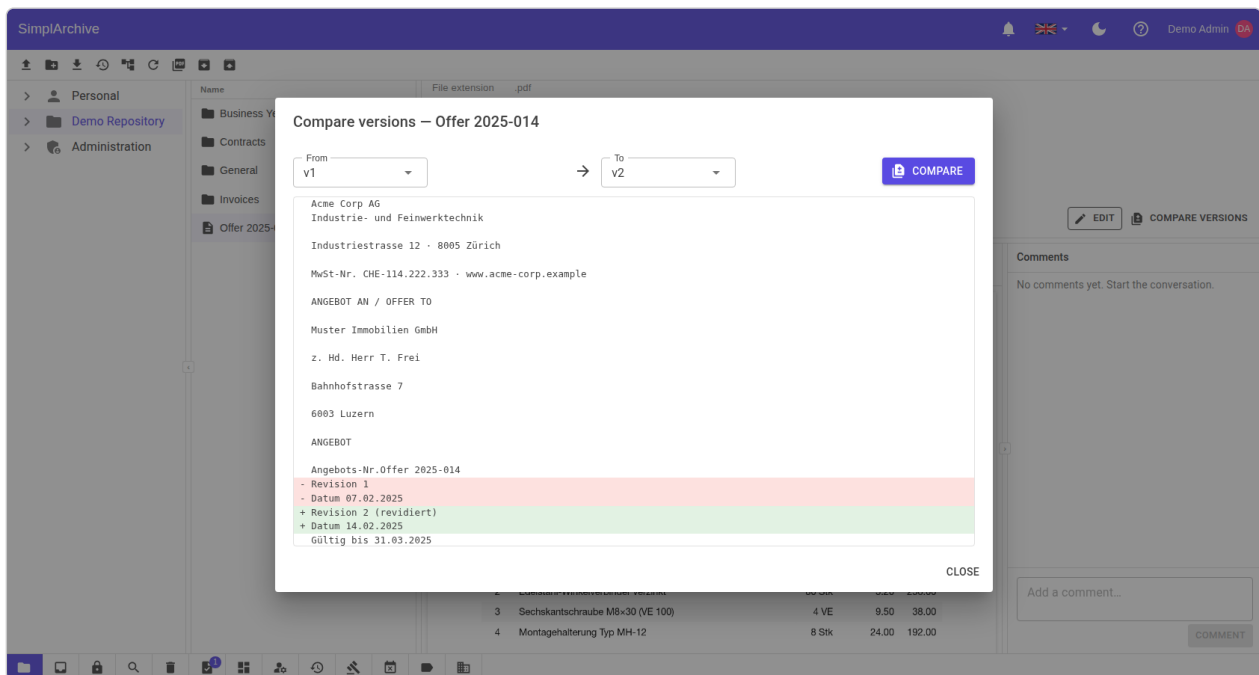


Figure 5: **Compare versions:** an inline diff of two revisions of a document — added lines marked with +, removed lines with - — so a change between versions is easy to see.

5 Organizing

Create **folders**, and **move** documents between them by drag-and-drop. A **reference** (shortcut) lets one document appear in several places without copying it. **Tags** label documents for quick grouping — your tenant can maintain a curated tag catalogue with colours. **Sensitivity labels** mark how confidential a document is. Every user also has a **personal repository** for private documents.

The whole archive is reachable over **WebDAV** as a network drive — not just your personal space but the shared repositories you have permission to access, with your rights enforced on every operation. To connect, open the account menu's **WebDAV** item: it shows the **mount URL** and your **username** (your e-mail), and a **Generate** button that issues an app-specific **WebDAV password** — separate from your login password and shown only once, so copy it right away. Mount that URL with those credentials to browse and edit documents from your operating system's file manager.

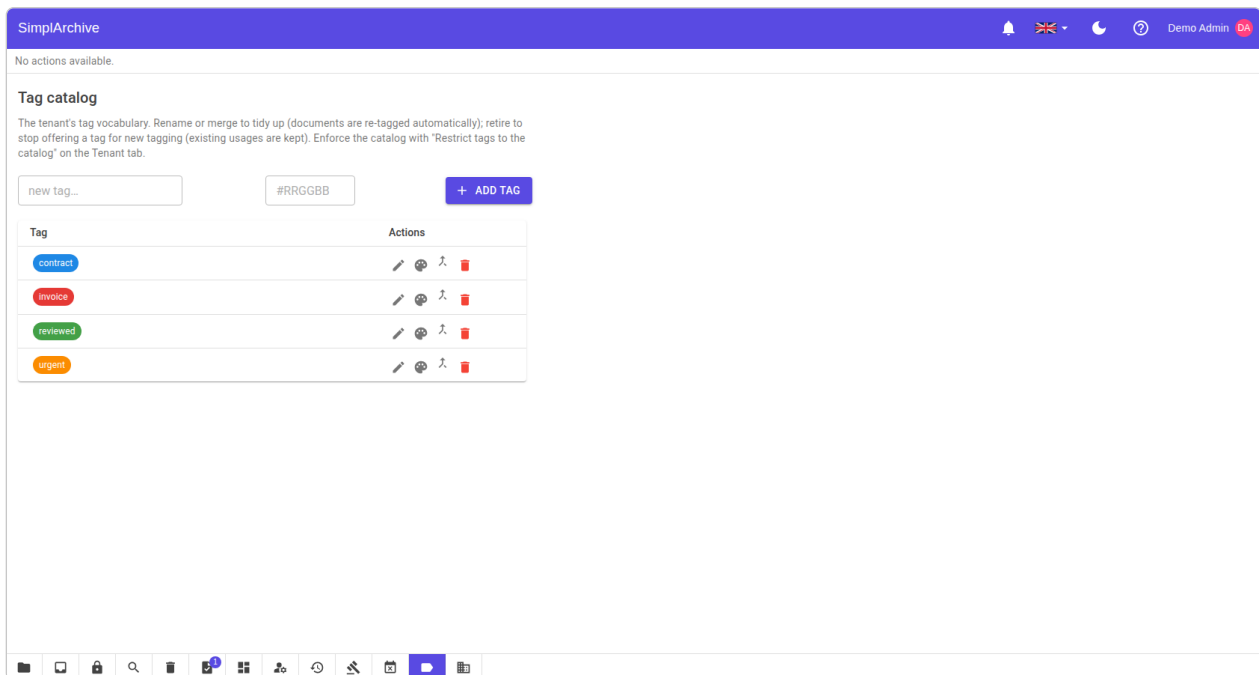


Figure 6: The tag catalogue: curated, colour-coded tags an administrator maintains for the whole tenant.

6 Metadata & classification

Each document has a **mask** (document type) that defines its **index fields** — typed metadata such as an invoice number or a date. Open the **detail** pane's edit toggle to fill them in. A document also carries a **document date** and one or more **OCR languages** used to make scans searchable.

Index fields are validated by the mask — a field marked required must be filled, and format/range rules are enforced when you save. Well-known masks (Folder, Basic Entry, e-Mail) exist in every tenant; administrators can add more.

7 Search

The **Search** tab runs a full-text search across document **content**, **names**, and **index-field** values, ranked by relevance, with hits highlighted on the preview — so a distinctive word buried in a document’s text (a product name on an invoice, say) finds exactly that document. **Refinement filters** and **facets** narrow the results — by document type, date, sensitivity, and more — and you can **save** a search to re-run or share it later.

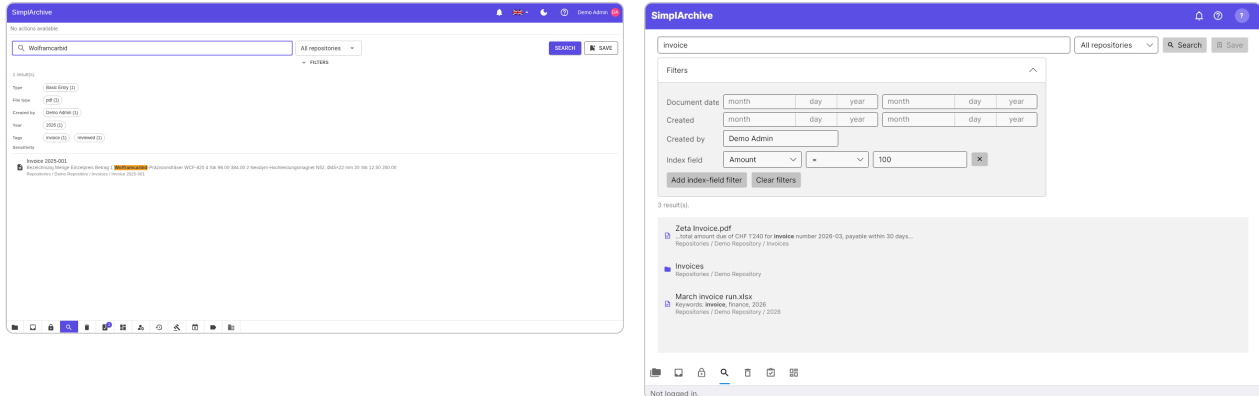


Figure 7: Full-text search with refinement filters and facets, in the web (left) and desktop (right) clients.

8 Collaboration

Documents are collaborative: post **comments** in a feed, attach **annotations** (sticky notes, highlights, and shapes) onto the preview, and **follow** a document or folder to be **notified** of activity. Set yourself a **reminder**, and track everything assigned to you on the **My work** dashboard. To edit a document exclusively, **check it out** — others see it is locked — then **check in** your changes as a new version.

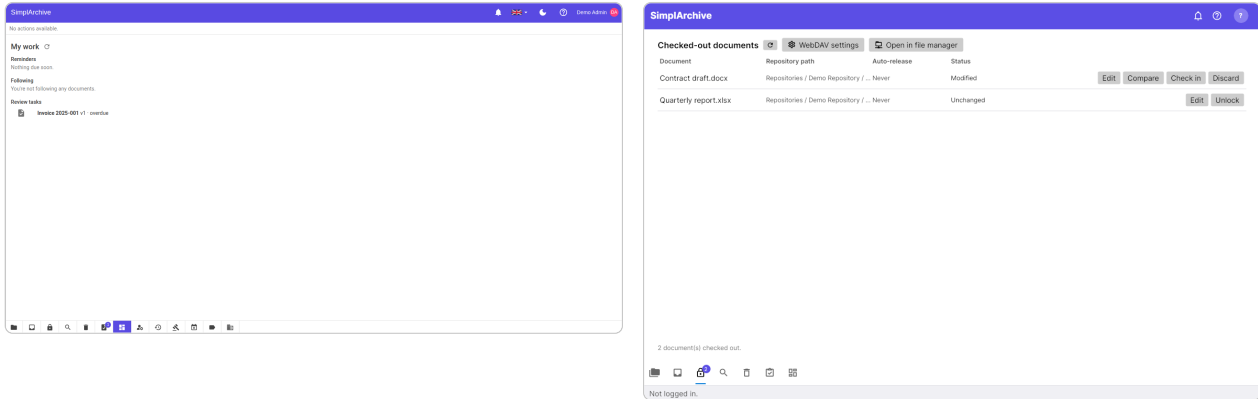


Figure 8: Left: the **My work** dashboard. Right: the **Check-out** tab listing documents locked for exclusive editing — here one edited (*Modified*) and one untouched (*Unchanged*).

9 Workflow & records

Approval workflow. Submit a document for review and it moves through a fixed state machine — Draft → In Review → Approved / Rejected → Released. Reviewers act on their **Tasks** tab; reviews can be reassigned, and overdue reviews escalate.

Records management. A **legal hold** freezes documents so they cannot be changed or deleted. **Retention** policies dispose of documents once their retention period ends (with review before disposition, if required). Deleted documents rest in the **Recycle bin**, from which an administrator can restore them or purge them permanently.

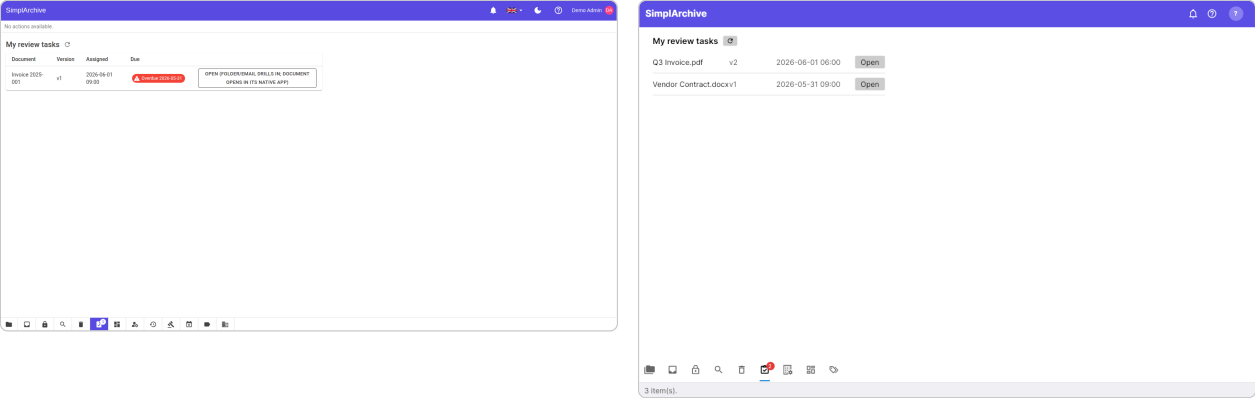


Figure 9: The Tasks tab — a reviewer’s approval queue — in the web (left) and desktop (right) clients.

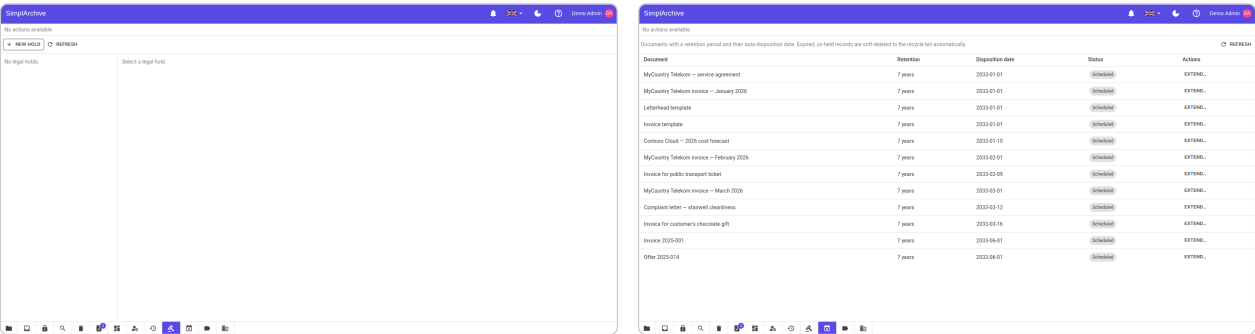


Figure 10: Records management: **legal holds** (left) freeze documents; **retention** (right) governs disposition.

10 Administration & account

Administrators manage **users & groups** and the **rights** granted to them, configure **tenant** settings, and review the tamper-evident **audit trail** of every security-relevant action. They also curate catalogues (sensitivity labels, tags), set the **storage quota**, and run **import / export**. Every user manages their own **account security** – password, multi-factor authentication (authenticator app or passkeys), and profile photo.

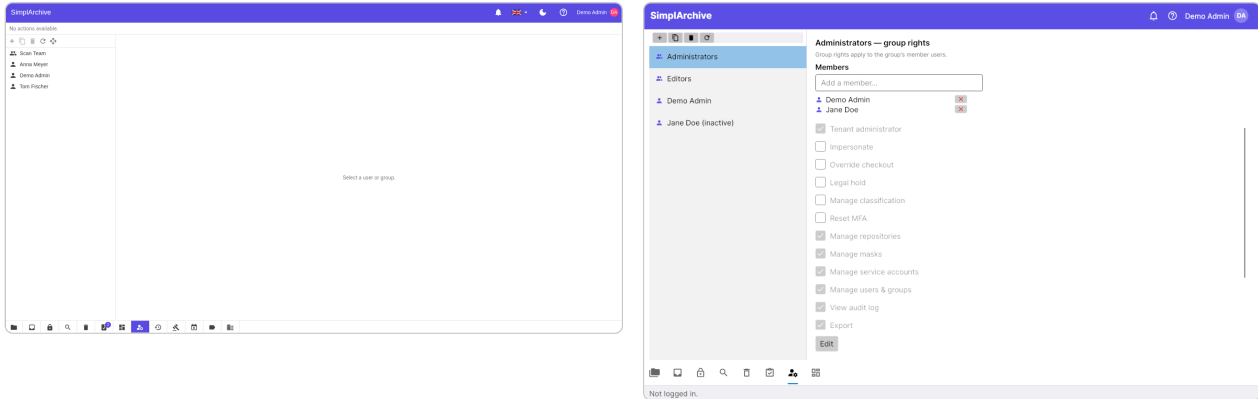


Figure 11: Users & groups administration in the web (left) and desktop (right) clients.

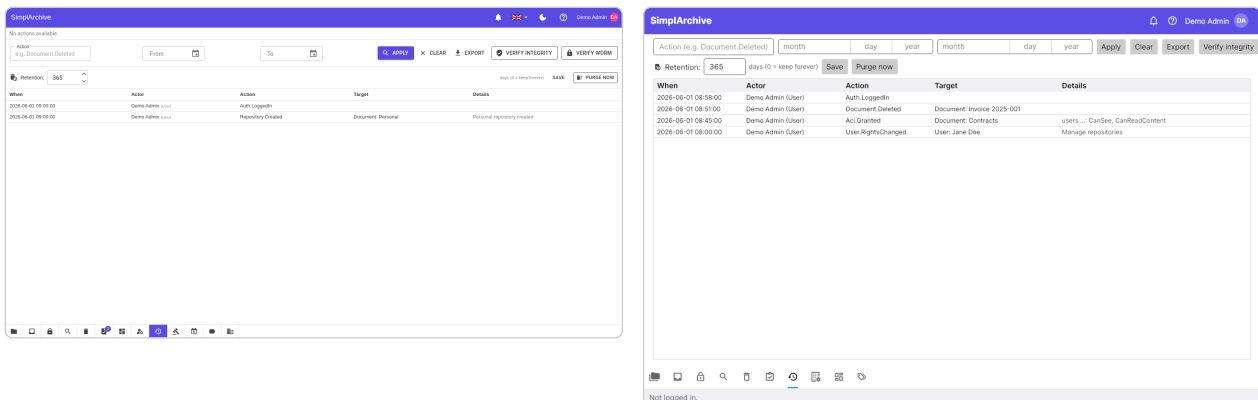


Figure 12: The audit trail — an append-only, hash-chained log — in the web (left) and desktop (right) clients.

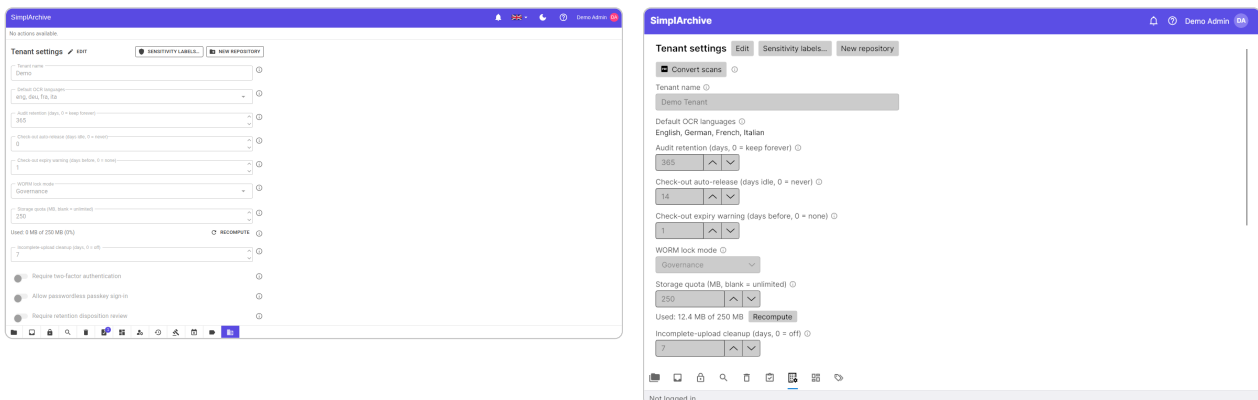


Figure 13: Tenant settings in the web (left) and desktop (right) clients.

The desktop client can connect to **several deployments**; its tenant manager stores a profile (name + address) for each.

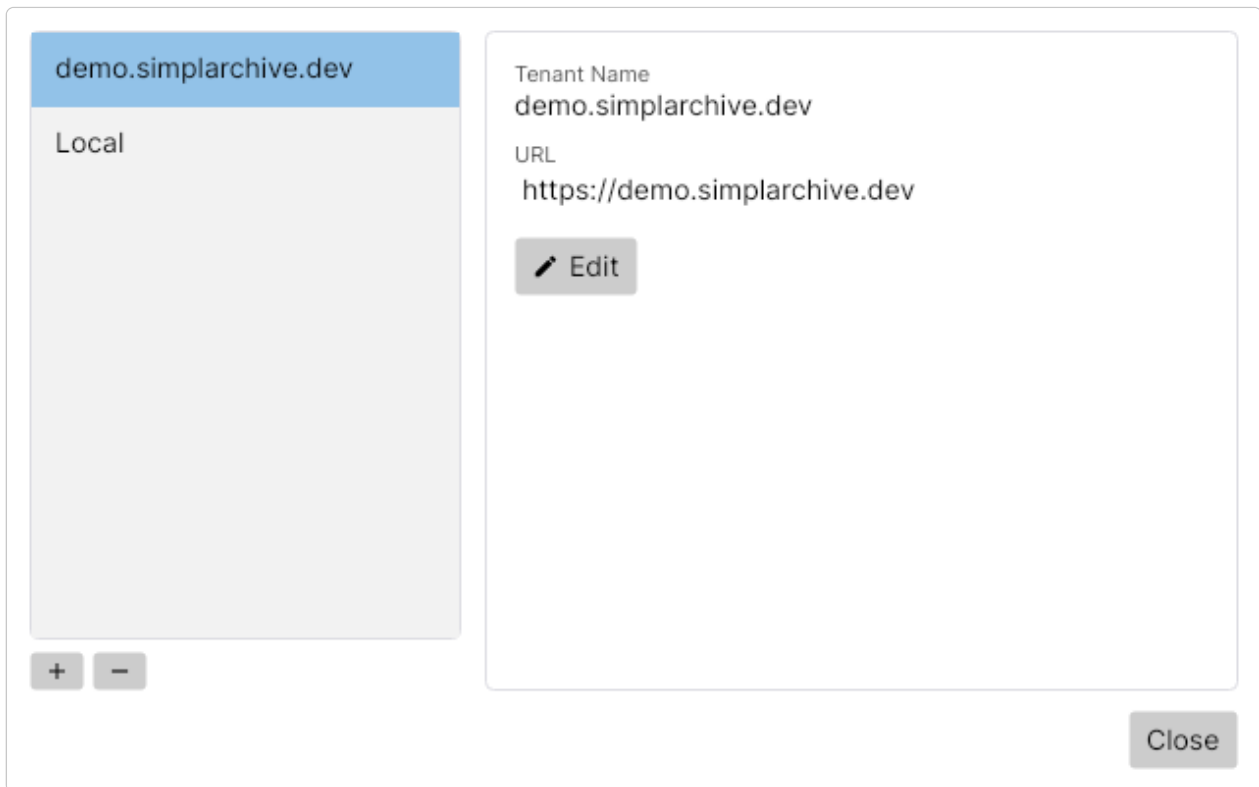


Figure 14: The desktop tenant manager: connection profiles for multiple SimplArchive deployments.

11 Appendix — glossary & links

Repository — a root folder (a document with no parent). **Mask** — a document type / set of index fields. **ACL** — per-document access-control list. **Version** — an immutable snapshot of a document's file. **Legal hold** — a freeze that blocks change/deletion. **Retention** — a policy that disposes of documents after a period.

Further reading:

- The live API description — the OpenAPI document at `/openapi/v1.json`.
- Desktop-client downloads — the download area at `/download`.