



INSTALLATION

ecoDMS Version 14.08 (krusty)

Legal Notice

ecoDMS Version: 14.08 (krusty)
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1 System Requirements

Please read the system requirements before installation. For more information and details, please visit our website at www.ecodms.de.

1.1 ecoDMS Server

Read the technical requirements for the ecoDMS Server including database, for NAS systems and Raspberry Pi here.

1.1.1 ecoDMS Server (general)

- Operating Systems: Windows 7, 8, 8.1, 10 | Windows Server 2008, 2012 | Ubuntu 12.04 LTS, 14.04 LTS, 16.08 LTS | Debian Wheezy, Jessie
- System Kernel: 32 & 64 bit
- Processor: minimum 2 Cores or minimum 2 Processors (x86/c64)
- RAM: minimum 4 GB (recommended)
- Hard Disk Space: ca. 800 MB for the Server, additionally storage for documents

1.1.2 Database

- Windows: postgresQL 9.3.X - 32bit
- Ubuntu / Debian: postgresQL (ecoDMS uses the respective standard database version of the distribution)
- Database Directory: The database directory must be stored on a local disk. Network or NAS drives (share folders) are not supported.

1.1.3 Virtual Machines

If you are using a virtual machine, please ensure that you are using a hardware virtual machine (HVM). PV (paravirtualisation) is not supported.

1.1.4 Network Attached Storage (NAS)

The ecoDMS server can be installed on a QNAP and Synology system. ecoDMS supports those device types from QNAP and Synology which allow container virtualization via "Docker". Not all models of the Synology and QNAP ranges support Docker. If the latest version of the Synology or QNAP software is installed on an NAS, and Docker is not available, the model is not compatible with ecoDMS. The download source and installation are described in the ecoDMS installation guide. You cannot download the components directly from the ecoDMS website. The ecoDMS server is installed via the Docker images provided especially for the two NAS systems. This "image" serves as a template when creating an ecoDMS container.

- Hardware: QNAP & Synology
- System: Docker Support (virtualization)
- Processor: X86
- RAM: mind. 2 GB RAM (required)
- Properties: The QNAP ContainerStation integrates the virtualisation technologies LXC (Linux containers) and Docker. Thus allowing the operation of several isolated Linux systems on a QNAP NAS. Using Synology, Docker can be installed via the Package Center.

1.1.5 Raspberry Pi

We provided the ecoDMS Server version for Raspberry Pi as a playground for tech-savvy ecoDMS users. However, we do not recommend productive use with large data volumes and/or in companies. To best exploit the advantages of the archiving solution, we recommend you install the ecoDMS components on high-performing software with respective storage capacity.

- Hardware: RASPBERRY PI 2 MODEL B, RASPBERRY PI 3 MODEL B
- Operating System: RASPBIAN Jessie 32-bit
- RAM: 1 GB RAM
- CPU RASPBERRY PI 2: 900 MHZ quad-core ARM Cortex-A7
- CPU RASPBERRY PI 3: 1,2 GHz quad-core ARMv8 CPU

1.2 ecoDMS Client

Read the technical requirements for the user interface of the archive solution.

- Supported Operating Systems: Windows 7, 8, 8.1, 10 | Windows Server 2008, 2012 | Ubuntu (KDE/Gnome) 12.04 LTS, 14.04 LTS, 16.04 LTS | Debian (KDE/Gnome) Wheezy, Jessie | MacOS 10.8 (64bit) & higher
- System Kernel: 32 & 64 bit
- Processor Architecture: x86/x64 RAM: minimum 1 GB (recommended)
- Hard Disk Space: ca. 60 MB
- Display Resolution: minimum 1280 x 1024 Pixel

1.3 ecoICE Client

Read the technical requirements for the user interface of ecoICE for the processing of scanned documents here.

- Supported Operating Systems: Windows 7, 8, 8.1, 10 | Windows Server 2008, 2012 | Ubuntu (KDE/Gnome) 12.04 LTS, 14.04 LTS, 16.04 LTS | Debian (KDE/Gnome) Wheezy, Jessie | MacOS 10.8 (64bit) & higher
- System Kernel: 32 & 64 bit
- Processor Architecture: x86/x64 RAM: minimum 1 GB (recommended)
- Hard Disk Space: ca. 100 MB
- Display Resolution: minimum 1280 x 1024 Pixel
- File formats: TIFF and PDF
- Scanner Interface: TWAIN, WIA, SANE - additional scaninput folder

1.4 PDF/A Printer

Read the technical requirements for the ecoDMS virtual PDF/A Printer here.

- Operating Systems: Windows 7, 8, 8.1, 10 | Windows Server 2008, 2012 | Ubuntu 12.04 LTS, 14.04 LTS, 16.04 LTS | Debian Wheezy, Jessie
- System Kernel: 32 & 64 bit (Windows Distributions), 64 bit (Linux Distributions)
- Hard Disk Space: ca. 50 MB
- Display Resolution: minimum 1280 x 1024
- Storage Format: PDF/A
- Applications: Printable Software

1.5 Microsoft Office Plugin

Read the technical requirements for the ecoDMS Plugin for direct archiving from MS Office here.

- Operating Systems: Windows 7, 8, 8.1, 10 | Windows Server 2008, 2012
- System Kernel: 32 & 64 bit (Windows Distributions)
- Display Resolution: minimum 1280 × 1024 Pixel Storage
- Format: PDF/A & Original Office Format, E-Mails from Outlook: PDF/A & EML Format
- Office Versions: 2010, 2013, 2016
- Applications: Word, Excel, PowerPoint, Outlook

1.6 Libre- & OpenOffice Addon

Read the technical requirements for the ecoDMS Addon for direct archiving from LibreOffice and OpenOffice here.

- Operating Systems: Windows 7, 8, 8.1, 10 | Windows Server 2008, 2012 | Ubuntu 12.04 LTS, 14.04 LTS, 16.04 LTS | Debian Wheezy, Jessie | MacOS 10.8 (64bit) & higher
- System Kernel: 32 & 64 bit
- Display Resolution: minimum 1280 × 1024 Pixel
- Storage Format: PDF/A & Original Office Format
- Office Versions: Version 3.6 & higher
- Applications: Writer, Calc, Draw, Impress

1.7 Thunderbird Addon

Read the technical requirements for the ecoDMS Addon for manual email archiving from Thunderbird here.

- Operating Systems: Windows 7, 8, 8.1, 10 | Windows Server 2008, 2012 | Ubuntu 12.04 LTS, 14.04 LTS, 16.04 LTS | Debian Wheezy, Jessie | MacOS 10.8 (64bit) & higher
- System Kernel: 32 & 64 bit (Windows Distributions), 64 bit (Linux Distributions)
- Display Resolution: minimum 1280 × 1024 Pixel
- Storage Format: PDF/A & EML
- Thunderbird Versions: Version 10.X & higher
- Information: No PDF/A files are generated via the ecoDMS Thunderbird plugin for MacOS. Only the original e-mail is deposited as an EML file. This is NOT an error in ecoDMS: https://bugzilla.mozilla.org/show_bug.cgi?id=675709

2 Upgrade under Windows

This chapter describes the upgrade process to the major release version 14.08 (krusty) under Windows.

2.1 Important Upgrade Fundamentals

1. If you are upgrading from the **previous ecoDMS version 12.05 (brandine)** to ecoDMS version 14.08 (krusty), you must follow the upgrade steps in the **this installation manual**.
 - a) When upgrading from version 12.05 (brandine) to version 14.08 (krusty), make sure that the last update 12.05-6 of ecoDMS version 12.05 (brandine) is installed on your system.
 - b) If this is not the case, you must update to the last version 12.05-6 of ecoDMS 12.05 (brandine) before upgrading to version 16.09 (eleanor).
2. Ensure you create a backup before updating or upgrading.
3. **Please note that existing data will be migrated and full-text indexed in the background after the upgrade.**
 - a) The duration of the operation depends on the data volume.
 - b) Until the migration has completed, the server may show high capacity utilisation.
 - c) Leave the computer switched on until the migration is complete.
 - d) You can monitor the progress under "Settings - File Indexing" in the Settings dialogue box.

2.2 How to Upgrade

Execute the upgrade by working through the following steps in the order specified. Please note the "Upgrade Fundamentals" before you start.

1. Make sure that ecoICE does not contain any documents. Any documents in ecoICE may not be transferred.
2. Create a full backup of the existing database.
 - a) You can either create the backup via the ecoDMS component OneClick Backup or via the console programme for manual backup.
3. For security reasons we also recommend you make a separate backup of the data folder.
 - a) When installing the ecoDMS server, you selected / specified the folder, respectively.
 - b) The default location is

```
%ProgramData%
```

To back up the data folder, complete the following steps:

- a) Stop the following services in your Windows Service Manager.

```
ecoSIMS-economicSystemIndependentModuleServer
```

```
ecodmspsql-8.X-PostgreSQLServer8.X
```

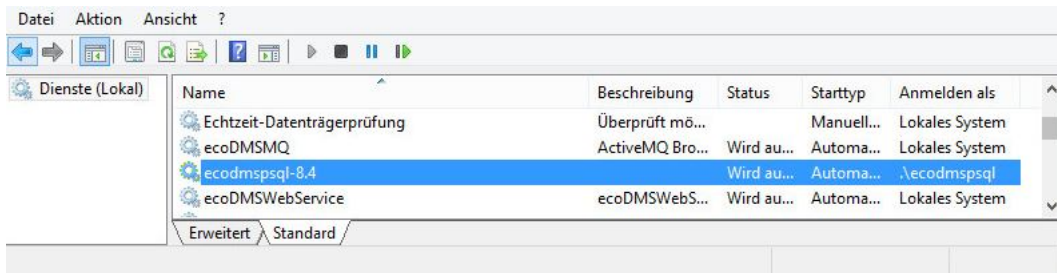



Figure 2.1: Stop Service (12.05)

- a) After you have stopped the services properly, copy the data folder.
4. Now uninstall all existing components of ecoDMS. To do this, complete the uninstallation steps in this installation manual.
 - a) Make sure that really all components will be uninstalled.
 - b) Be carefull that you do not mix the old and new components of ecoDMS.
5. Restart your computer.
6. Now install the ecoDMS Server and the other components of the new ecoDMS version according to this installation guide.
7. Restart your computer.
8. Now import the backup completely and properly.
 - a) Use the OneClick Backup component of ecoDMS to import the backup. You can also use the restore script to restore the database manually.
 - b) Read the ecoDMS manual for more information about the restore process.
9. **Please note that existing data will be migrated and full-text indexed in the background.**
 - a) The duration of the operation depends on the data volume.
 - b) Until the migration is complete, the server may show high capacity utilisation.
 - c) Leave the computer switched on until the migration is complete.
 - d) You can monitor the progress under "Settings - File Indexing" in the Settings dialogue box.

2.3 License Information

Because of comprehensive innovations, changes and additional functions, you cannot use licences from previous versions to activate a new major release. Of course your ecoDMS licence will remain valid and can be used with the respective ecoDMS version.

3 Windows Installations

The following section describes how to install the available ecoDMS components under Windows.

- Ensure you create a backup before updating or upgrading.
- If you wish to upgrade from a previous version to the current major release, please follow the upgrade steps.
- For a simple update of the same major release, just install the software over the old version.
- You must always update all components.

3.1 AllinOne Installation

Use this installation file to execute all necessary base components in sequence within one installation. The package includes the ecoDMS Server with postgreSQL database, the ecoDMS Client including Connection Manager, the ecoICE Client and the PDF/A Printer from ecoDMS. If all ecoDMS components of the installation have been installed on a workstation, an ecoDMS profile will already exist in the Connection Manager for this workstation. Please refer to the chapter "Access Data" in the ecoDMS manual for the access data for the default profile [3, 4, 1, 2, 5, 6].

1. If this installation is an update, close all Connection Managers first and make sure that no user is connected with the server.

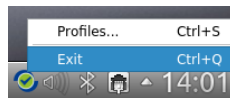


Fig. (similar) 3.1: Exit Connection Manager

2. Download the file for the AllinOne Installer at ecodms.de.
3. If this is a ZIP-file, unzip it first.
4. Execute the installation file "...exe".
5. During the installation, the firewall might inquire whether the application is allowed to access the network. Confirm with "Yes".
6. Select the language for the installation and confirm your selection with "OK".
 - a) You can install server and client in different languages.
 - b) The display of the classification attributes and messages depends, however, on the language selection of the ecoDMS server component.

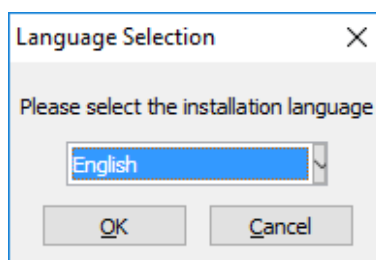


Fig. (similar) 3.2: AllinOne Installer: Language Selection

7. Click "Next" in the "Start Screen".

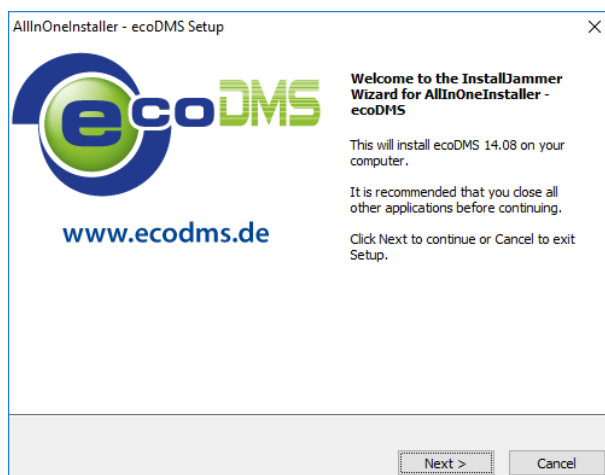


Fig. (similar) 3.3: Start Screen AllInOneInstaller

8. The ecoDMS components available in the AllInOneInstaller are displayed. Select the components you want to install and confirm your selection with "Continue".

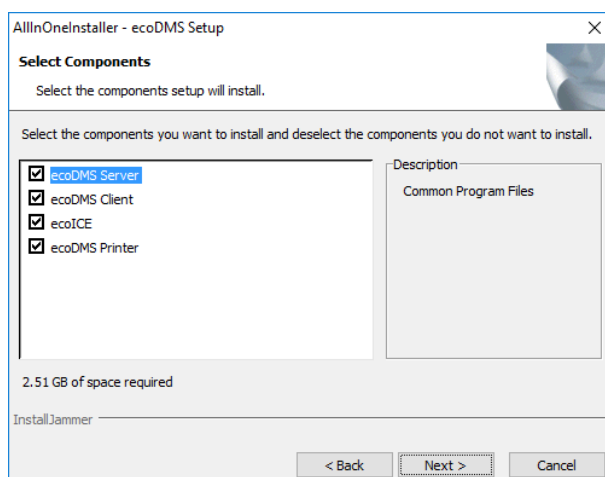


Fig. (similar) 3.4: AllInOneInstaller - Select Components

9. The installation of the selected components is being prepared. This process may take a while.

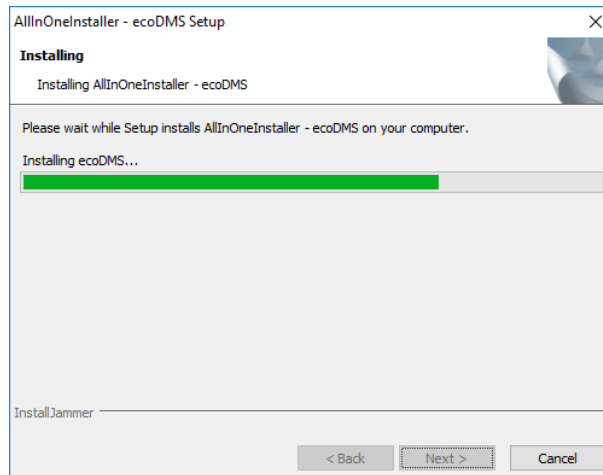


Fig. (similar) 3.5: AllInOneInstaller - Preparing for installation

10. Now follow the installation manual of the selected components from step 5 onwards.

3.2 ecoDMS Server

Use this installation file to install the ecoDMS server. As a client-server system, the ecoDMS Server forms the base of the entire application. The server is not a piece of hardware, but a software component. The following explains the installation process of the ecoDMS server under Windows [3, 4, 1, 2, 5, 6].

1. If this installation is an update, close all Connection Managers first and make sure that no user is connected with the server.

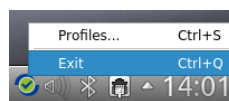


Fig. (similar) 3.6: Exit Connection Manager

2. Download the file for the ecoDMS Server at ecodms.de.
3. If this is a ZIP-file, unzip it first.
4. Execute the installation file "...exe".
5. During the installation the firewall might inquire whether the application is allowed to access the network. Confirm with "Yes".
6. Select the language for the installation and confirm your selection with "OK".
 - a) You can install server and client in different languages.
 - b) The display of the classification attributes and messages depends, however, on the language selection of the ecoDMS Server component.

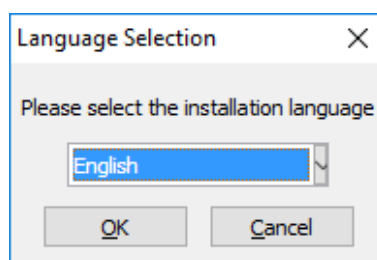


Fig. (similar) 3.7: ecoDMS Server: Language Selection

7. Confirm the dialogue box with "Yes".

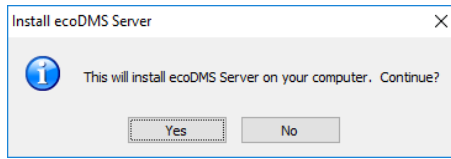


Fig. (similar) 3.8: ecoDMS Server: Information

8. Click "Next" in the "Start Screen".

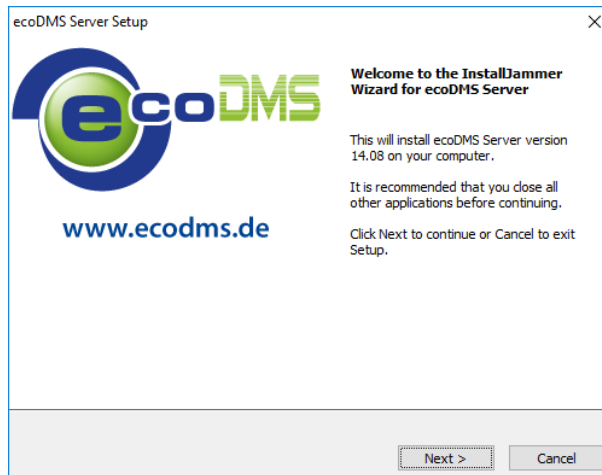


Fig. (similar) 3.9: Start Screen ecoDMS Server

9. Read the licence agreement carefully and tick the check box "I accept the terms of the licence agreement". Click "Next" to continue.

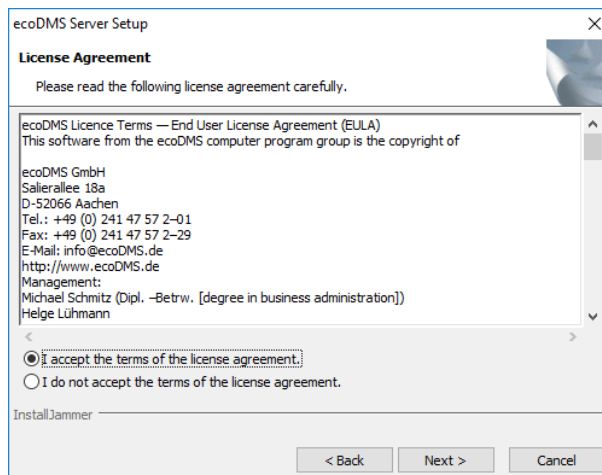


Fig. (similar) 3.10: ecoDMS Server: License Agreement

10. Select the server components you want to install.

- a) We recommend you install "ecoDMS Server 14.08" and "postgreSQL".
- b) If the installation is an update, only the "ecoDMS Server 14.08" is displayed here for selection.

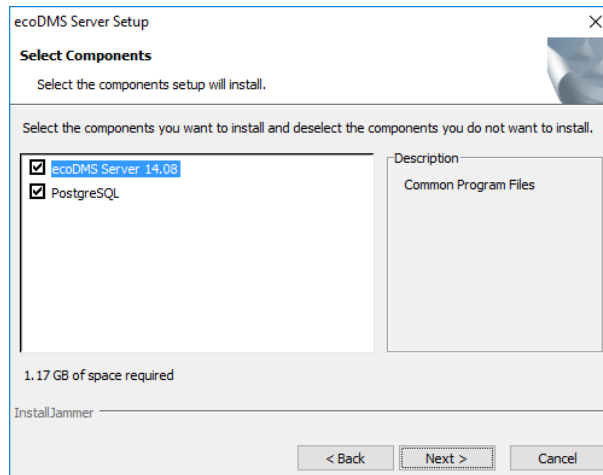


Fig. (similar) 3.11: ecoDMS Server: Select Components

11. Select the installation folder. You can change the suggested folder by clicking "Browse".

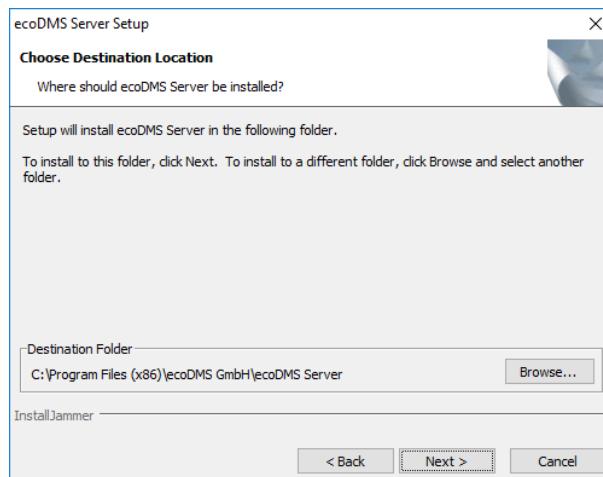


Fig. (similar) 3.12: ecoDMS Server: Installation Destination

12. If the ecoDMS Server is installed for the first time, the ports selection for ecoDMS displays now. Select the default port for ecoDMS and for the database. If this is a default installation, the predefined ports should not be changed. The ports are used, for example, for the client connections and for the database. If the selected port is already occupied, an error message displays [5].
- If a compatible version of postgresQL is already installed, the installation of the ecoDMS Server does not create a new instance. A new database (ecodms) is created in the existing instance.
 - If postgresQL was installed manually, ensure that it was the postgresQL version supported by ecoDMS (postgresQL 9.3.X - 32bit).
 - During the installation, ecoDMS requests the access data for the existing postgresQL database.
 - If postgresQL was installed manually, make sure that the postgresQL service is started before the ecoDMS Server. Otherwise the ecoDMS Server cannot be executed.

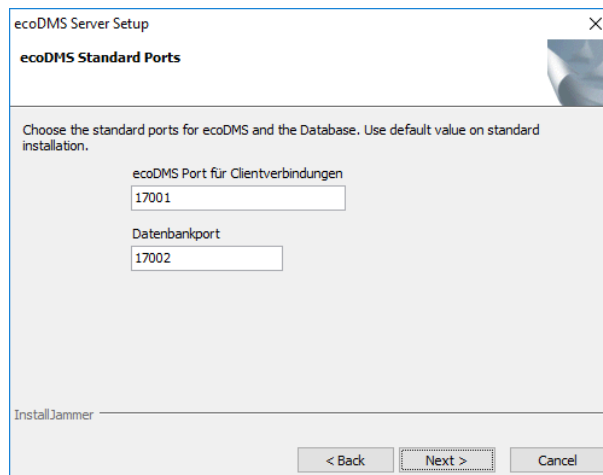


Fig. (similar) 3.13: ecoDMS Server: Enter Port

13. Select the folder in which you want ecoDMS to save the archived documents. In a default installation, the default folder should not be changed. Please note that the database folder must be located on a local disk.

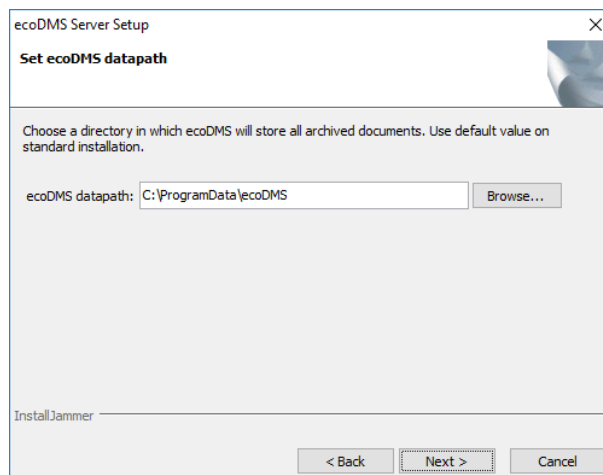


Fig. (similar) 3.14: ecoDMS Server: Data Path

14. Only displayed for german installation: If you have not created a postgresQL Database, you can select a default setting for the database. The default setting includes a pre-defined archive structure for different application fields. A rough folder structure, document types and, depending on the line of business, some specific classification attributes already exist.

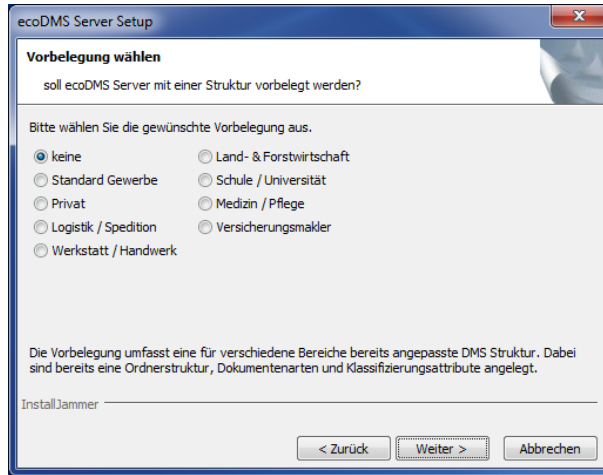


Fig. (similar) 3.15: ecoDMS Server: Default Settings

15. The setup dialogue box displays the installation information. Confirm the information with "Next".

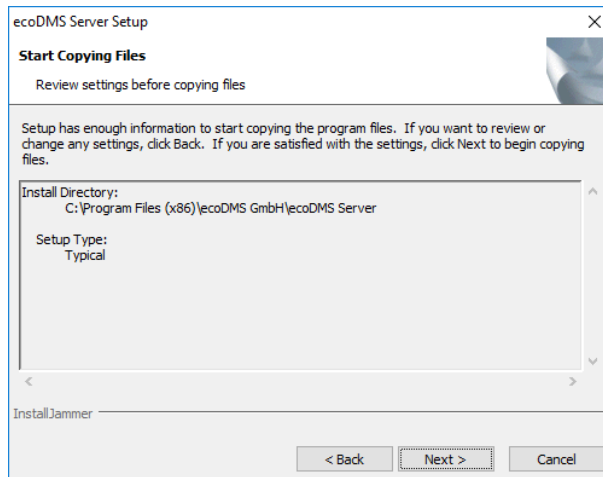


Fig. (similar) 3.16: ecoDMS Server: Copy Files

16. The selected server components are installed. This operation may take a while.

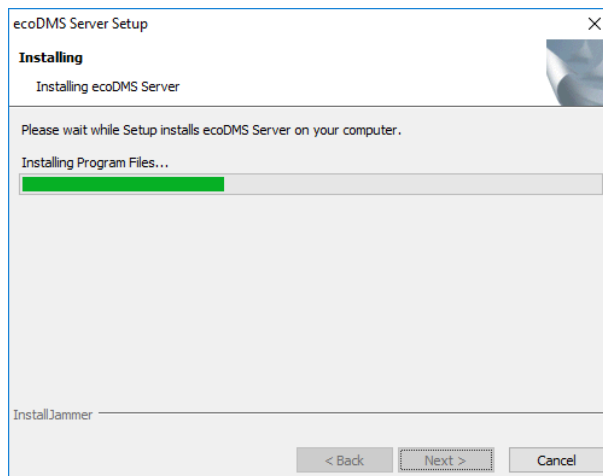


Fig. (similar) 3.17: ecoDMS Server: Installing ecoDMS Server

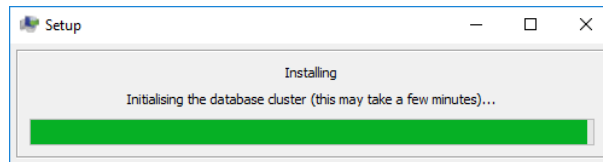


Fig. (similar) 3.18: ecoDMS Server: Installation postgresSQL

17. The installation of the ecoDMS Server is complete. Click "Finish".
 - a) We recommend you restart the computer after the installation.



Fig. (similar) 3.19: ecoDMS Server: Installation Complete

3.3 ecoDMS Client

Use this installation file to install the ecoDMS Archive user interface. Moreover, the Connection Manager is a fixed component of this software package. The following explains the installation process of the ecoDMS Client under Windows [1, 2, 6].

1. If this installation is an update, close all Connection Managers first and make sure that no user is connected with the server.

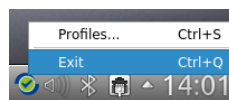


Fig. (similar) 3.20: Exit Connection Manager

2. Download the file for the ecoDMS Client at ecodms.de.
3. If this is a ZIP-file, unzip it first.
4. Execute the installation file "...exe".
5. During the installation the firewall might inquire whether the application is allowed to access the network. Confirm with "Yes".
6. Select the language for the installation and confirm your selection with "OK".
 - a) You can install server and client in different languages.
 - b) The display of the classification attributes and messages depends, however, on the language selection of the ecoDMS Server component.

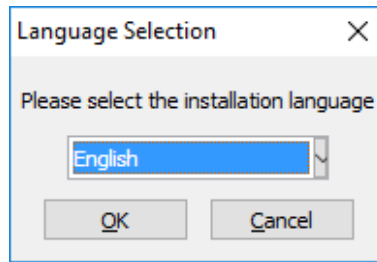


Fig. (similar) 3.21: ecoDMS: Language Selection

7. Confirm the dialogue box with "Yes".

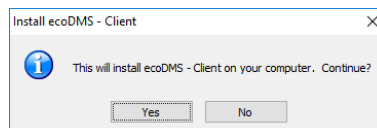


Fig. (similar) 3.22: ecoDMS: Note

8. Click "Next" in the "Start Screen".

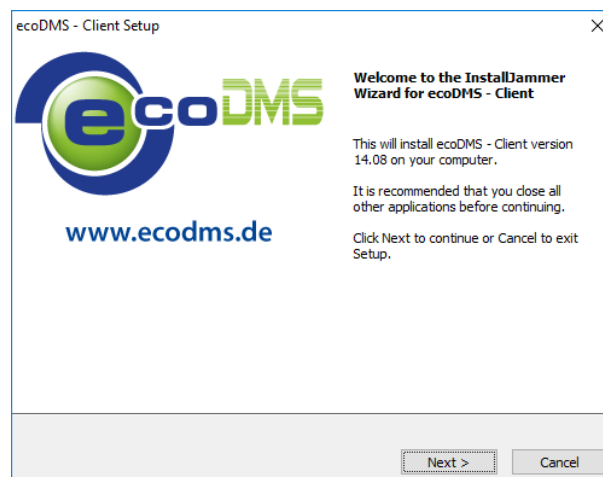


Fig. (similar) 3.23: Start Screen ecoDMS

9. Read the licence agreement carefully and tick the check box "I accept the terms of the licence agreement". Click "Next" to continue.

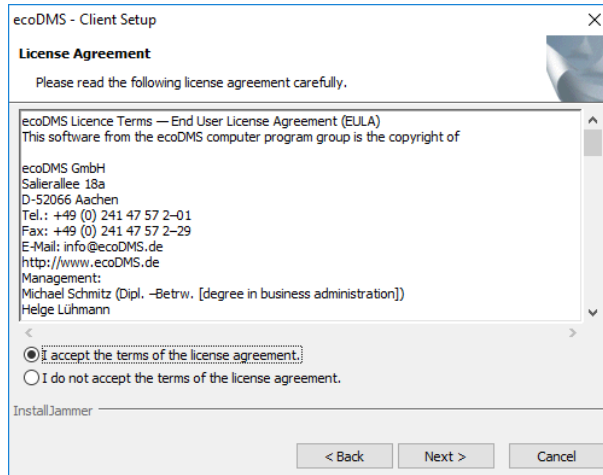


Fig. (similar) 3.24: ecoDMS: License Agreement

10. Select the installation folder. You can change the suggested folder by clicking "Browse".

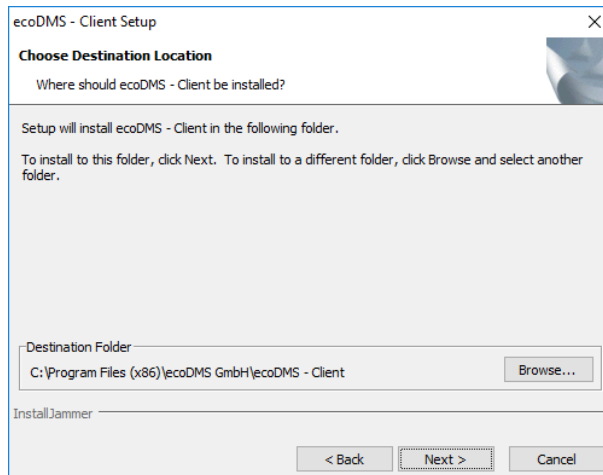


Fig. (similar) 3.25: ecoDMS: Installation Destination

11. The setup dialogue box displays the installation information. Confirm the information with "Next".

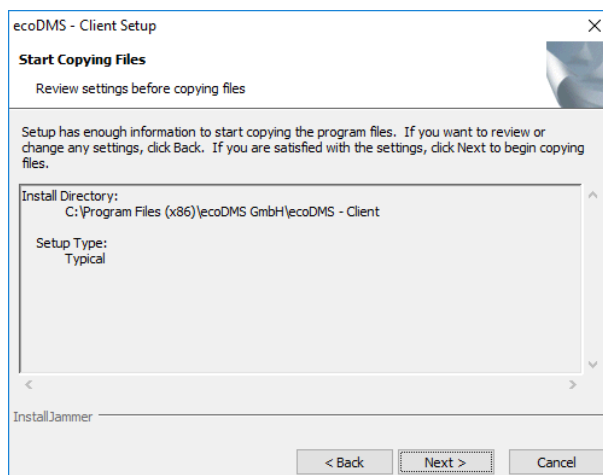


Fig. (similar) 3.26: ecoDMS: Copy Files

12. The installation is performed. This operation may take a while.

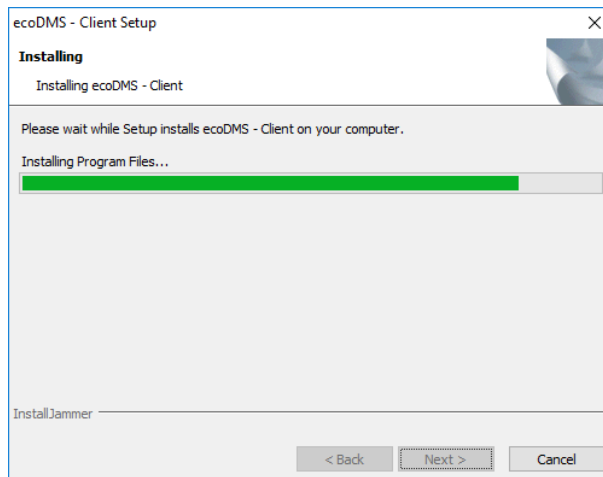


Fig. (similar) 3.27: ecoDMS: Installation

13. The installation is complete. Click "Finish".

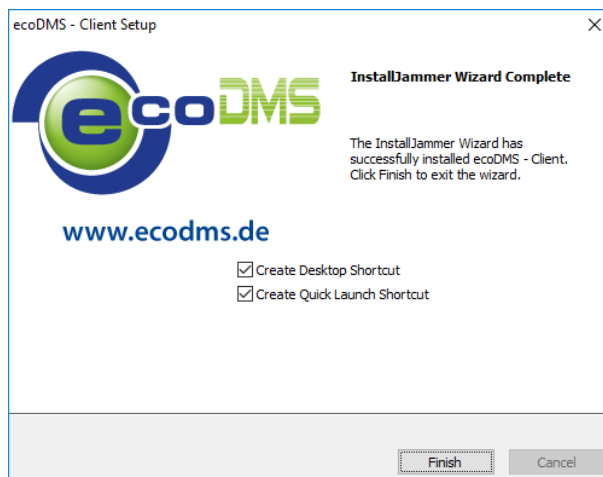


Fig. (similar) 3.28: ecoDMS: Installation Complete

3.4 ecoICE Client

Use this installation file to install the ecoICE user interface for incoming e-mail processing of scanned documents. The following explains the installation process of the ecoICE Client under Windows [1, 2, 6].

1. If this installation is an update, close all Connection Managers first and make sure that no user is connected with the server.

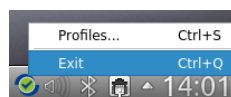


Fig. (similar) 3.29: Exit Connection Manager

2. Download the file for the ecoICE Client at ecodms.de.
3. If this is a ZIP-file, unzip it first.

4. Execute the installation file "...exe".
5. During the installation the firewall might inquire whether the application is allowed to access the network. Confirm with "Yes".
6. Select the language for the installation and confirm your selection with "OK".
 - a) You can install server and client in different languages.
 - b) The display of the classification attributes and messages depends, however, on the language selection of the ecoDMS Server component.

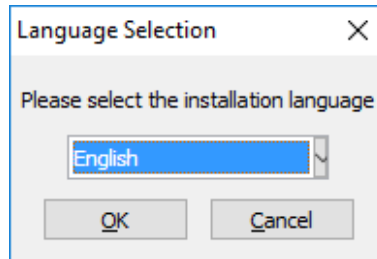


Fig. (similar) 3.30: ecoICE: Language Selection

7. Confirm the dialogue box with "Yes".

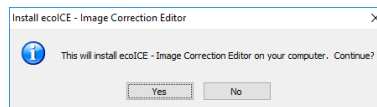


Fig. (similar) 3.31: ecoICE: Message

8. Click "Next" in the "Start Screen".

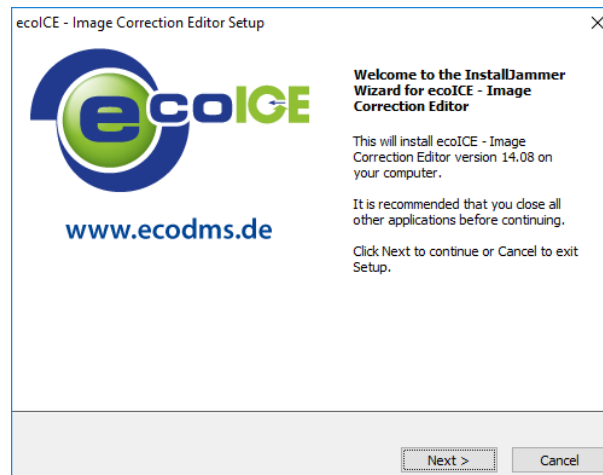


Fig. (similar) 3.32: Start Screen ecoICE

9. Read the licence agreement carefully and tick the check box "I accept the terms of the licence agreement". Click "Next" to continue.

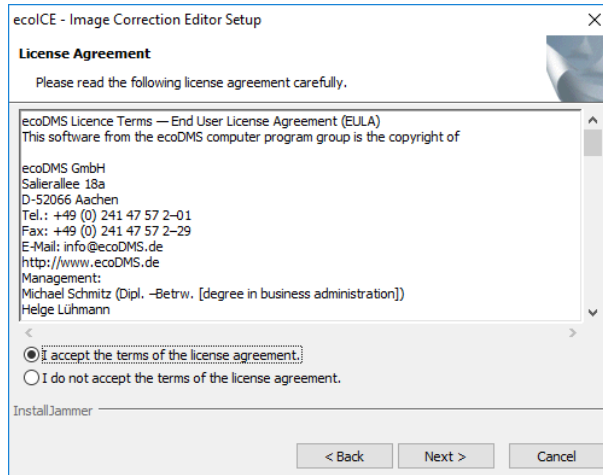


Fig. (similar) 3.33: ecoICE: License Agreement

10. Select the installation folder. You can change the suggested folder by clicking "Browse".

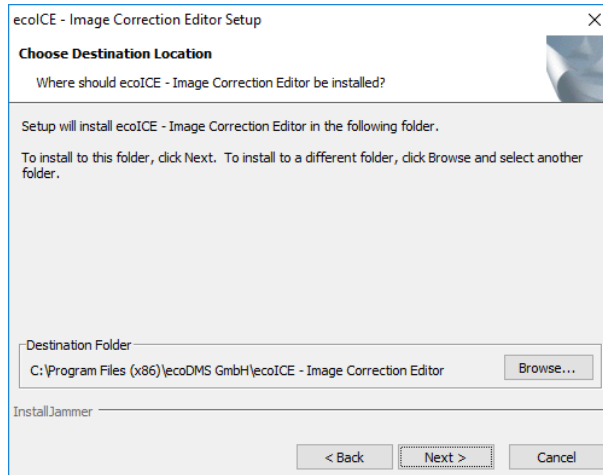


Fig. (similar) 3.34: ecoICE: Installation Destination

11. The setup dialogue box displays the installation information. Confirm the information with "Next".

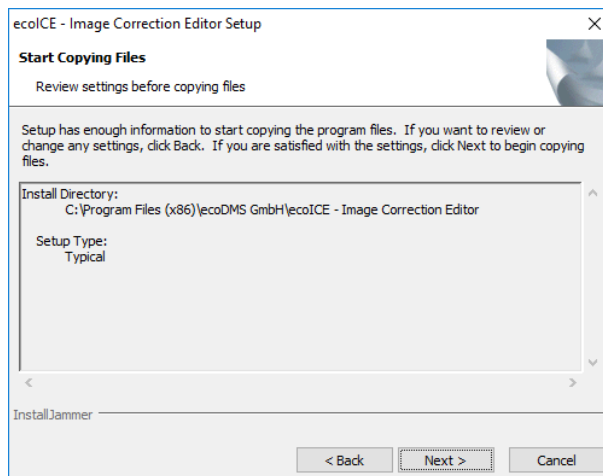


Fig. (similar) 3.35: ecoICE: Copy Files

12. The installation is performed. This operation may take a while.

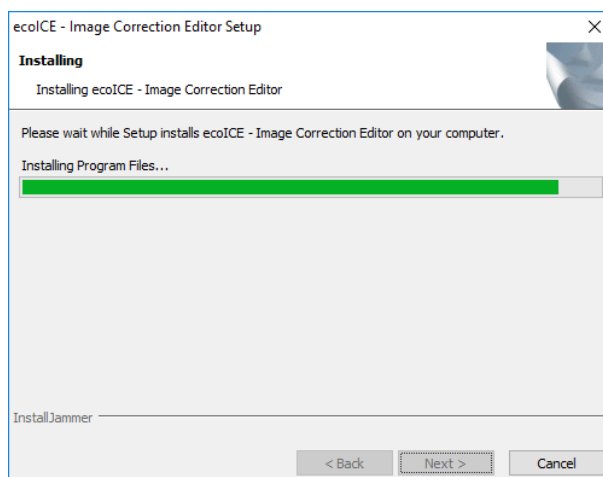


Fig. (similar) 3.36: ecoICE: Installation

13. The installation is complete. Click "Finish".



Fig. (similar) 3.37: ecoICE: Installation Complete

3.5 PDF/A Printer

Use this file to install the ecoDMS virtual PDF/A Printer (Printer driver). The following explains the installation process of the ecoDMS PDF/A Printer under Windows [1, 2, 6].

1. Download the file for the ecoDMS PDF/A Printer at ecodms.de.
2. If this is a ZIP-file, unzip it first.
3. Execute the installation file "...exe".
4. During the installation the firewall might inquire whether the application is allowed to access the network. Confirm with "Yes".
5. Select the language for the installation and confirm your selection with "OK".
 - a) You can install server and client in different languages.
 - b) The display of the classification attributes and messages depends, however, on the language selection of the ecoDMS Server component.

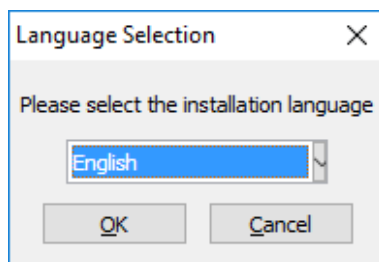


Fig. (similar) 3.38: PDF/A Printer: Language Selection

6. Confirm the dialogue box with "Yes".

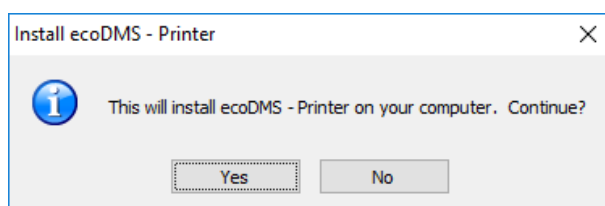


Fig. (similar) 3.39: PDF/A Printer: Message

7. Click "Next" in the "Start Screen".

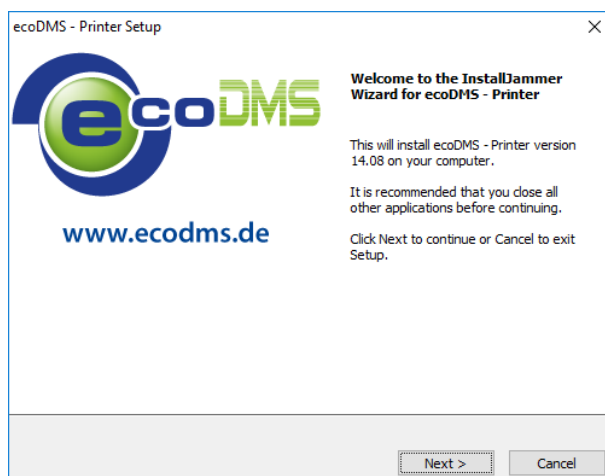


Fig. (similar) 3.40: Start Screen PDF/A Printer

8. Read the licence agreement carefully and tick the check box "I accept the terms of the licence agreement". Click "Next" to continue.

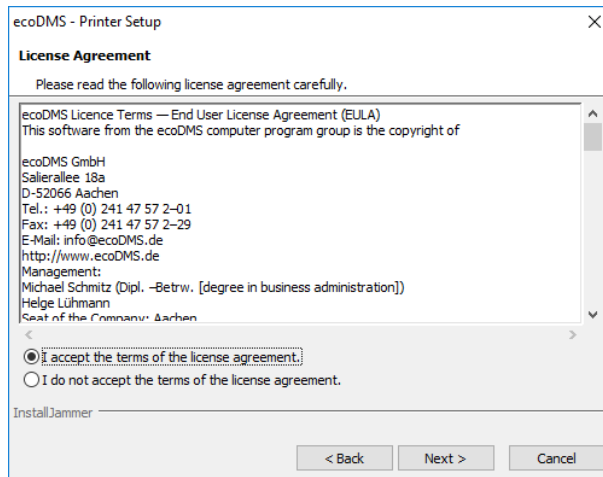


Fig. (similar) 3.41: PDF/A Printer: License Agreement

9. Select the installation folder. You can change the suggested folder by clicking "Browse".

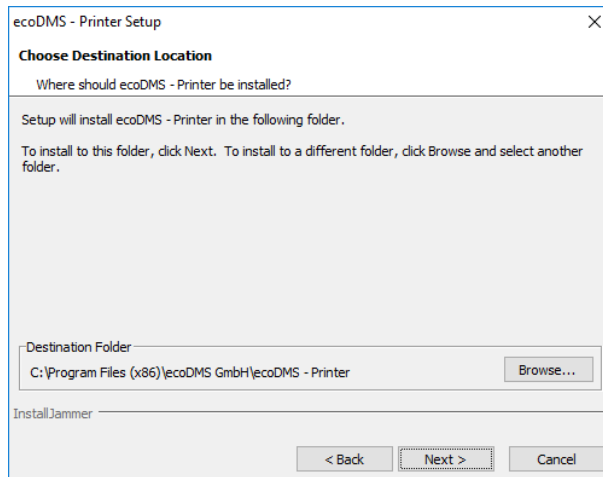


Fig. (similar) 3.42: PDF/A Printer: Installation Destination

10. The setup dialogue box displays the installation information. Confirm the information with "Next".

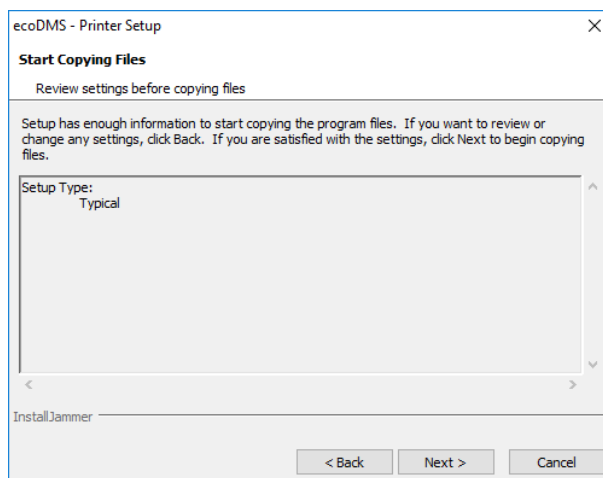


Fig. (similar) 3.43: PDF/A Printer: Copy Files

11. The installation is performed. This operation may take a while.

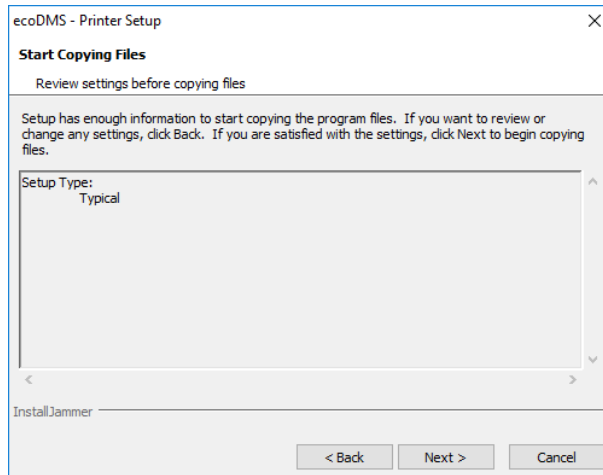


Fig. (similar) 3.44: PDF/A Printer: Installation

12. Confirm the Windows confirmation prompt with "Install".

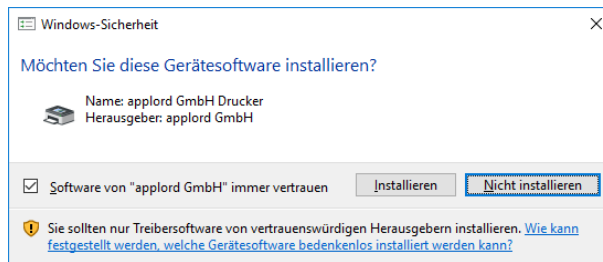


Fig. (similar) 3.45: PDF/A Printer: Confirmation Prompt

- 13. The installation is complete.
 - a) Read the notes in the window (red).
 - b) Click "Finish".



Fig. (similar) 3.46: PDF/A Printer: Installation Complete

3.6 postgresQL: Manual Installation

All documents and information from ecoDMS are archived on the ecoDMS Server in a database. You need postgresQL in order to install and use the ecoDMS Server successfully. Usually the database is installed together with the ecoDMS Server. If you want to install postgresQL manually via the console, complete the following steps [3, 4, 1, 2, 5]:

1. If an error occurred in the postgresQL installation during the installation of the server and the database, uninstall all previously installed ecoDMS components and restart the computer / server.
2. Enter the address <http://www.postgreSQL.org> in your internet browser.
3. Click the Downloads menu item.
4. Select an operating system (here as an example: Windows)
5. Continue in the download area to find the "AllinOneInstaller".
6. Now select the Windows 9.3.X.X version.
7. A download window opens.
8. Start the download of postgresQL-9.3.X-X-windows.exe and save the file on your computer in a destination folder (for example desktop).
9. To open the console
 - a) in Windows 7, click the start icon (Windows icon) and then enter the command cmd in the entry window.

```
cmd
```

10. Then enter the following commands in the window and confirm each with Enter.

```
cd destination folder
Filename install_runtimes 0
```

Example:

```
cd Desktop
postgresQL-9.3.X-X-windows install_runtimes 0
```

11. Now follow the installation wizard.

Important Information for Chapter 3

- [1] *During the installation the firewall might inquire whether the application is allowed to access the network. Confirm this with Yes.*
- [2] *Ensure you make a backup before updating or upgrading. If you wish to upgrade from a previous version to a new major release, please follow the upgrade steps in the new installation manual. For a simple update of the same major release, just install the software over the old version. You must always update all components. Do not mix the components of an earlier ecoDMS version with this version. After an upgrade, a downgrade is only possible to an older ecoDMS version when there is a full backup of the previous version.*
- [3] *If ecoDMS has been uninstalled and you want to reinstall, the computer must be restarted first.*
- [4] *On Windows systems, the installation must be executed by a local administrator (not a domain administrator).*
- [5] *The database folder (postgresQL) must not contain any spaces, umlauts or special characters and must be located on a local hard disk. To do so, do not use a network drive or an NAS drive (no share folder). If postgresQL is already installed, the installation of the ecoDMS server does not create a new instance. A new database (ecodms) is created in the existing instance. If postgresQL was installed manually, you must disable the postgresQL installation when the ecoDMS server is installed afterwards. If postgresQL was installed manually, ensure that it was the postgresQL version supported by ecoDMS (postgresQL 9.3.X - 32bit). During the installation, the access data for the existing postgresQL database is requested. If the existing postgresQL version does not match the ecoDMS version, postgresQL - if not disabled in the ecoDMS installer - is installed parallel to the existing system. If postgresQL was installed manually, ensure that the postgres service is started before the ecoDMS server starts. Otherwise the ecoDMS server can not be started.*

- [6] *You can install server and clients in different languages. The view of the classification attributes and messages depends on the language you have selected for the ecoDMS server component.*

4 Windows Uninstallations

The following section describes how to uninstall ecoDMS components under Windows [2, 3, 1].

4.1 ecoDMS Server

The following explains the uninstall process of the ecoDMS Server under Windows [2, 3, 1].

1. First, close all connection managers and make sure that no user is connected with the server.

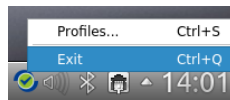


Fig. (similar) 4.1: Close Connection Manager

2. Select -> Programs -> ecoDMS Server in the control panel.
3. Now execute the "Uninstall" process / function.
4. Confirm the question whether you want to uninstall the programme with "Yes". Cancel the process with "No".

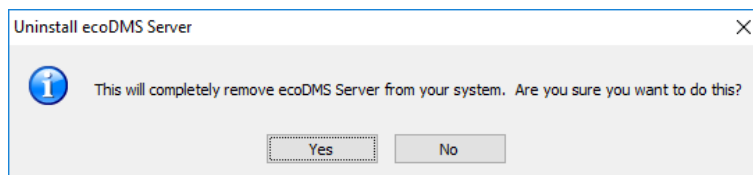


Fig. (similar) 4.2: ecoDMS Server - Uninstallation - Question

5. The first uninstallation steps start. This operation may take a while.
6. To start the uninstall process, confirm the security message related to the database and data backup with "Continue". Click "Cancel" to abort the process.
 - a) Please note that by uninstalling the ecoDMS Server under Windows, the entire database of ecoDMS will be deleted. The ecoDMS Server component as well as the postgresSQL database with all archived documents, settings and information are deleted. You can only restore the data again if you created a complete and clean backup before uninstalling.

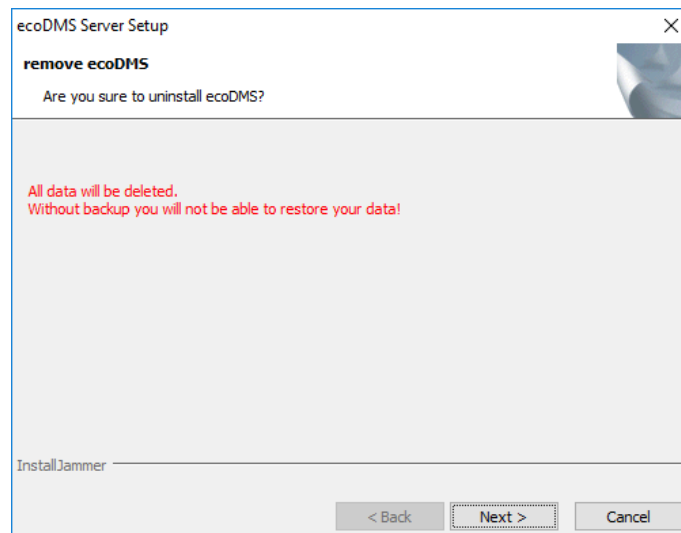


Fig. (similar) 4.3: ecoDMS Server - Uninstallation - Database Information

7. The uninstall process is executed. This operation may take a while.

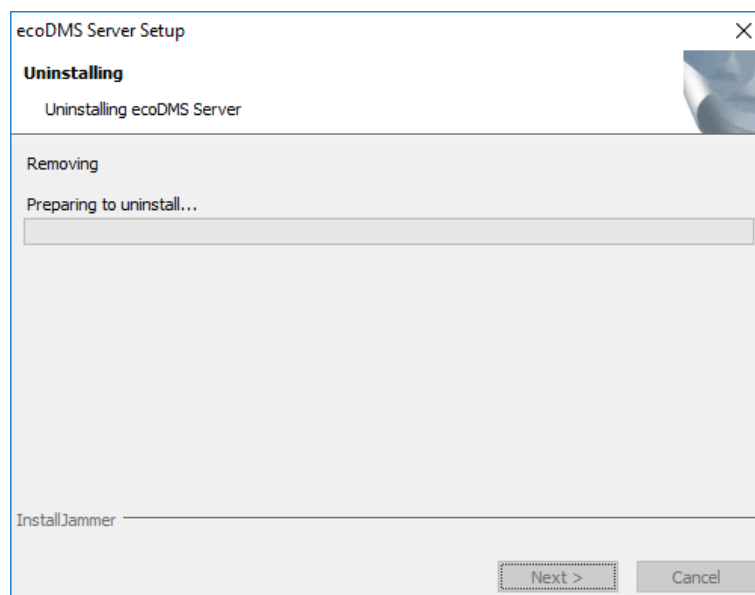


Fig. (similar) 4.4: ecoDMS Server - Uninstallation - Processing

8. You have now uninstalled the plugin. The ecoDMS Server has been removed from your system.
- If you want to reinstall the system afterwards, restart the computer first.

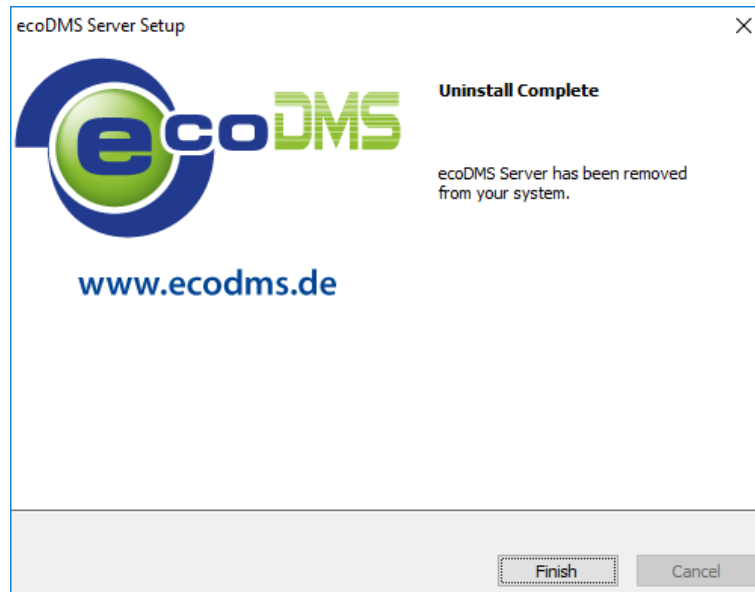


Fig. (similar) 4.5: ecoDMS Server - Uninstallation - Completed

4.2 ecoDMS Client

The following explains the uninstall process of the ecoDMS Client under Windows [1].

1. First, close all Connection Managers and make sure that no user is connected with the server.

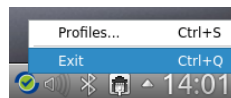


Fig. (similar) 4.6: Close Connection Manager

2. Select Programs -> ecoDMS on the control panel.
3. Now execute the "Uninstall" process / function.
4. Confirm the question whether you want to uninstall the programme with "Yes". Cancel the process with "No".

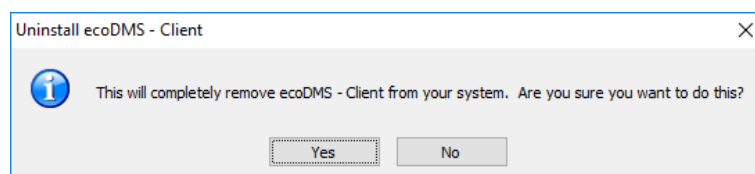


Fig. (similar) 4.7: ecoDMS Client - Uninstallation - Question

5. The uninstall process is performed. This operation may take a while.
6. The uninstallation is complete and the ecoDMS Client has been removed from your system.

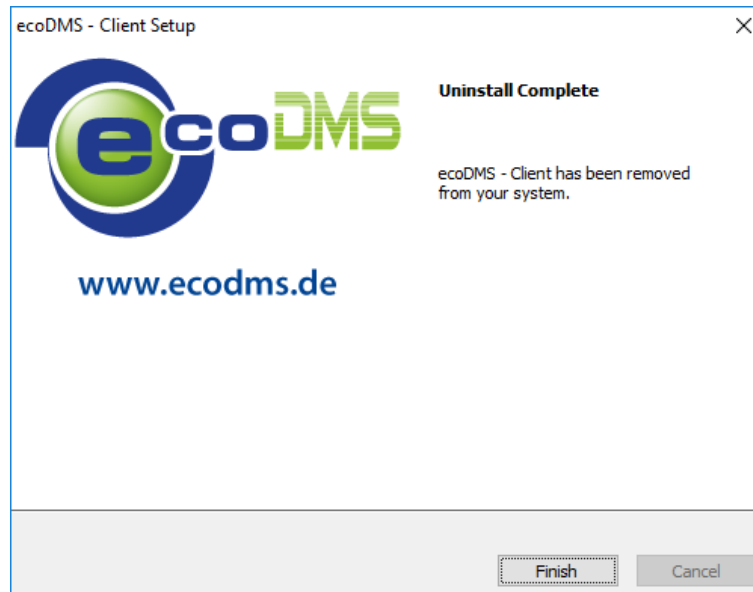


Fig. (similar) 4.8: ecoDMS Client - Uninstallation - Completed

4.3 ecoICE Client

The following explains the uninstall process of the ecoICE Client under Windows [1].

1. First, close all Connection Managers and make sure that no user is connected with the server.

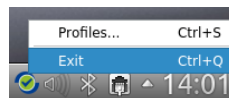


Fig. (similar) 4.9: Close Connection Manager

2. Select Programs -> ecoICE on the control panel.
3. Now execute the "Uninstall" process / function.
4. Confirm the question whether you want to uninstall the programme with "Yes". Cancel the process with "No".

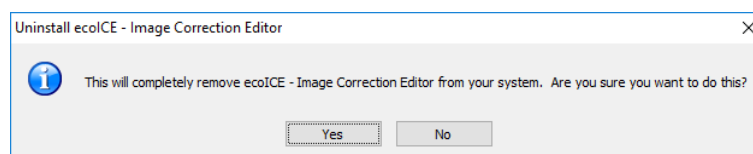


Fig. (similar) 4.10: ecoICE Client - Uninstallation - Question

5. The uninstall process is performed. This operation may take a while.
6. The uninstallation is complete and the ecoICE Client has been removed from your system.



Fig. (similar) 4.11: ecoICE Client - Uninstallation - Completed

4.4 ecoDMS PDF/A Printer

The following explains the uninstall process of the ecoDMS PDF/A Printer under Windows [1].

1. First, close all Connection Managers and make sure that no user is connected with the server.

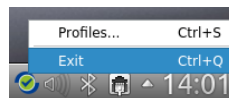


Fig. (similar) 4.12: Close Connection Manager

2. Select -> Programs -> "ecoDMS PDF/A Printer" in the control panel.
3. Now execute the "Uninstall" process / function.
4. Confirm the question whether you want to uninstall the programme with "Yes". Cancel the process with "No".

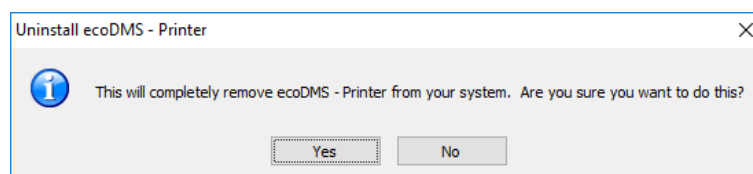


Fig. (similar) 4.13: ecoDMS PDF/A Printer - Uninstallation - Question

5. The uninstall process is executed. This operation may take a while.
6. The uninstallation is complete and the PDF/A Printer has been removed from your system.

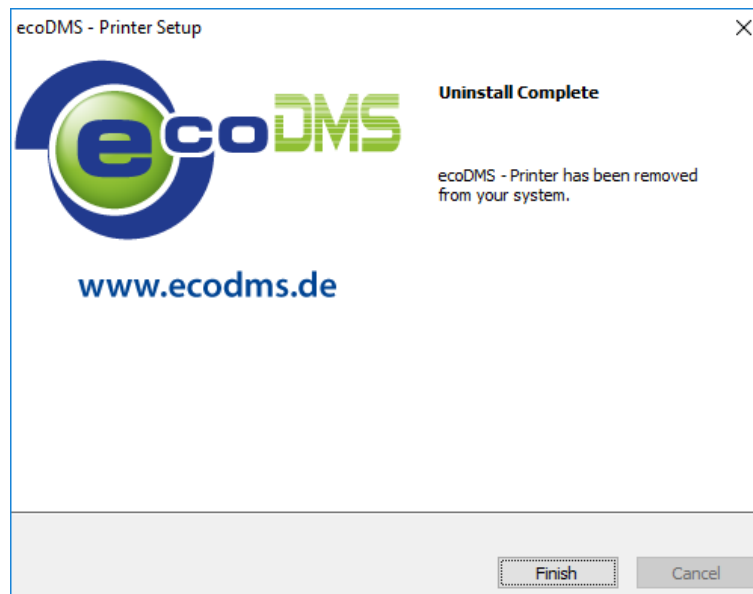


Fig. (similar) 4.14: ecoDMS PDF/A Printer - Uninstallation - Completed

Important Information for Chapter 4

- [1] *Ensure you make a backup before updating or upgrading. If you wish to upgrade from a previous version to a new major release, please follow the upgrade steps in the new installation manual. For a simple update of the same major release, just install the software over the old version. You must always update all components. Do not mix the components of an earlier ecoDMS version with this version. After an upgrade, a downgrade is only possible to an older ecoDMS version when there is a full backup of the previous version.*
- [2] *If ecoDMS has been uninstalled and you want to reinstall, the computer must be restarted first.*
- [3] *If the installation is a standard installation (ecoDMS Server (ecoSIMS) including database via the ecoDMS installer) and you delete ecoDMS server components, all ecoDMS data is also deleted irrevocably. You can only restore all the archived files, information settings etc. if you created a comprehensive and clean backup of the entire database before uninstalling. Without a backup you will not be able to restore your data after uninstalling.*

5 Upgrade under Ubuntu / Debian

This chapter describes how to upgrade to the major release version 14.08 (krusty) under Windows.

5.1 Important Upgrade Fundamentals

1. If you are upgrading from the **previous ecoDMS version 12.05 (brandine)** to ecoDMS version 14.08 (krusty), you must follow the upgrade steps in the **this installation manual**.
 - a) When upgrading from version 12.05 (brandine) to version 14.08 (krusty), make sure that the last update 12.05-6 of ecoDMS version 12.05 (brandine) is installed on your system.
 - b) If this is not the case, you must update to the last version 12.05-6 of ecoDMS 12.05 (brandine) before upgrading to version 16.09 (eleanor).
2. Ensure you create a backup before updating or upgrading.
3. **Please note that existing data will be migrated and full-text indexed in the background after the upgrade.**
 - a) The duration of the operation depends on the data volume.
 - b) Until the migration has completed, the server may show high capacity utilisation.
 - c) Leave the computer switched on until the migration is complete.
 - d) You can monitor the progress under "Settings - File Indexing" in the Settings dialogue box.

5.2 Perform Upgrade

Execute the upgrade by working through the following steps in the order specified. Please note the "Upgrade Fundamentals" before you start.

1. Make sure that ecoICE does not contain any documents. Any documents in ecoICE may not be transferred.
2. Create a full backup of the existing database.
 - a) You can create the backup with the console programme for manual backup.
3. Now uninstall all existing ecoDMS components of the previous version according to the steps in your installation manual of the existing ecoDMS version.
 - a) **Do not under any circumstances uninstall the postgresQL database.**
 - b) Make sure that all components have been uninstalled.
 - c) The components of the old and new version must not be mixed up.
4. Restart the computer after the uninstall process.
5. Now install the ecoDMS Server and the other components of the new ecoDMS version according to the new installation manual.
6. Restart your computer.
7. Now make a clean and complete import of the backup.
 - a) You can find a detailed description of the restore process in the ecoDMS manual.
8. **Please note that existing data will be migrated and full-text indexed in the background after the upgrade.**
 - a) The duration of the operation depends on the data volume.
 - b) Until the migration has completed, the server may show high capacity utilisation.
 - c) Leave the computer switched on until the migration is complete.
 - d) You can monitor the progress under "Settings - File Indexing" in the Settings dialogue box.

5.3 Licence Information

Because of comprehensive innovations, changes and additional functions, you cannot use licences from previous versions to activate a new major release. Of course your ecoDMS licence will remain valid and can be used with the respective ecoDMS version.

6 Ubuntu / Debian / Raspbian Installations

The following section describes how to install the available ecoDMS components under Linux distributions.

- Ensure you create a backup before updating or upgrading.
- If you wish to upgrade from a previous version to the current major release, please follow the upgrade steps.
- For a simple update of the same major release, just install the software over the old version.
- You must always update all components.

6.1 Install Editor

To install the ecoDMS components, you need an editor. To install, proceed the following steps:

1. Open the console (terminal) and enter the following command to install "mcedit":

```
sudo apt-get install mc
```

2. Confirm your entry with "Enter".
3. The editor will now be installed on your device.
 - a) The instructions, information, license agreements and system requirements of the respective manufacturer apply.

6.2 Configure apt Sources

Before you can install the ecoDMS components, you must first define the necessary apt sources. Proceed as follows [2, 1, 3, 4].

1. Now open the "sources.list" file for editing as follows:

```
sudo mcedit /etc/apt/sources.list
```

- a) You can also create your own sources list for the installation as follows:

```
sudo mcedit /etc/apt/sources.list.d/ecodms.list
```

2. Add the following rows (in accordance with your operating system) to the end of the file:

32bit / Ubuntu 12.04 LTS

```
deb http://www.ecodms.de/ecodms_140832/precise /
```

64bit / Ubuntu 12.04 LTS

```
deb http://www.ecodms.de/ecodms_140864/precise /
```

32bit / Ubuntu 14.04 LTS

```
deb http://www.ecodms.de/ecodms_140832/trusty /
```

64bit / Ubuntu 14.04 LTS

```
deb http://www.ecodms.de/ecodms_140864/trusty /
```

32bit / Ubuntu 16.04 LTS

```
deb http://www.ecodms.de/ecodms_140832/xenial /
```

64bit / Ubuntu 16.04 LTS

```
deb http://www.ecodms.de/ecodms_140864/xenial /
```

32bit / Debian Wheezy

```
deb http://www.ecodms.de/ecodms_140832/wheezy /
```

64bit / Debian Wheezy

```
deb http://www.ecodms.de/ecodms_140864/wheezy /
```

32bit / Debian Jessie

```
deb http://www.ecodms.de/ecodms_140832/jessie /
```

64bit / Debian Jessie

```
deb http://www.ecodms.de/ecodms_140864/jessie /
```

32bit / Debian Jessie (Raspbian for Raspberry PI)

```
deb http://www.ecodms.de/ecodms_140832/raspi /
```

3. Save your entry with "F2".
4. Exit the editor with "F10" or "ESC" (depending on the operating system).
5. Import the "Public Key" of "ecoDMS Repositories":

```
wget -O - http://www.ecodms.de/gpg/public.key | sudo apt-key add -
```

6. Before you can install the individual components, you must update the package sources with

```
sudo apt-get update
```

6.3 ecoDMS Server

As a client-server system, the ecoDMS Server forms the base of the entire application. The server is not a piece of hardware, but a software component. The following explains the installation process of the ecoDMS server under Linux distributions [2, 1, 3, 4].

1. If this installation is an update, close all Connection Managers first and make sure that no user is connected with the server.

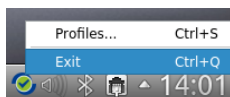


Fig. (similar) 6.1: Exit Connection Manager

2. A precondition for this installation is that the apt-sources were edited as described in this manual.
3. Open the console.

4. Start the installation with

```
sudo apt-get install ecodmsserver
```

5. Confirm the displayed questions / warnings with YES by entering Y [...]Do you want to continue?[...] [...]Do you want to install these packages without checking?[...]
 - a) This process may take a while.
6. Select the language for the installation and confirm your selection with "Enter".
 - a) You can install server and client in different languages.
 - b) The display of the classification attributes and messages depends, however, on the language selection of the ecoDMS Server component.
7. Read the licence agreement carefully and confirm them.
 - a) Use the Tab key to skip to "OK" and confirm with "Enter".
8. The installation is performed. This operation may take a while.

6.3.1 ecoDMS Server in a virtualised Linux environment

If the ecoDMS Server is installed in a virtualised Linux environment, there may be some difficulties when starting the ecoDMS Server, depending on the type of virtualisation. The cause of the issue is that the random values supplied by the VM required to generate keys are either missing or insufficient. To solve this issue, please enter the following commands in the console [2, 1, 3, 4]:

```
sudo service ecodms stop
sudo apt-get install haveged
sudo service ecodms start
```

6.4 ecoDMS Client

Use this installation steps to install the ecoDMS Archive user interface. Moreover, the Connection Manager is a fixed component of this software package. The following explains the installation process of the ecoDMS Client under Linux distributions [1, 3, 4].

1. If this installation is an update, close all Connection Managers first and make sure that no user is connected with the server.

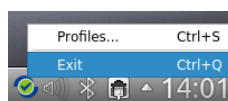


Fig. (similar) 6.2: Exit Connection Manager

2. A precondition for this installation is that the apt-sources were edited as described in this manual.
3. Open the console.
4. Start the installation with

```
sudo apt-get install ecodmsclient
```

5. Confirm the displayed questions / warnings with YES by entering Y [...]Do you want to continue?[...] [...]Do you want to install these packages without checking?[...]
 - a) This process may take a while.
6. Select the language for the installation and confirm your selection with "Enter".
 - a) You can install server and client in different languages.

- b) The display of the classification attributes and messages depends, however, on the language selection of the ecoDMS Server component.
- 7. Read the licence agreement carefully and confirm them.
 - a) Use the Tab key to skip to "OK" and confirm with "Enter".
- 8. The installation is performed. This operation may take a while.

6.5 ecoICE Client

Use this installation steps to install the ecoICE user interface for incoming e-mail processing of scanned documents. The following explains the installation process of the ecoICE Client under Linux distributions [1, 3, 4].

1. If this installation is an update, close all Connection Managers first and make sure that no user is connected with the server.

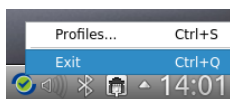


Fig. (similar) 6.3: Exit Connection Manager

2. A precondition for this installation is that the apt-sources were edited as described in this manual.
3. Open the console.
4. Start the installation with


```
sudo apt-get install ecoice
```
5. Confirm the displayed questions / warnings with YES by entering Y [...]Do you want to continue?[...] [...]Do you want to install these packages without checking?[...]
 - a) This process may take a while.
6. Select the language for the installation and confirm your selection with "Enter".
 - a) You can install server and client in different languages.
 - b) The display of the classification attributes and messages depends, however, on the language selection of the ecoDMS Server component.
7. Read the licence agreement carefully and confirm them.
 - a) Use the Tab key to skip to "OK" and confirm with "Enter".
8. The installation is performed. This operation may take a while.

6.6 ecoDMS PDF/A Printer

Use this steps to install the ecoDMS virtual PDF/A Printer (Printer driver). The following explains the installation process of the ecoDMS PDF/A Printer under Linux distributions [1, 3, 4].

1. If this installation is an update, close all Connection Managers first and make sure that no user is connected with the server.

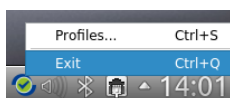


Fig. (similar) 6.4: Exit Connection Manager

2. A precondition for this installation is that the apt-sources were edited as described in this manual.
3. Open the console.
4. Start the installation with

```
sudo apt-get install ecodmsprinter
```

5. Confirm the displayed questions / warnings with YES by entering Y [...]Do you want to continue?[...] [...]Do you want to install these packages without checking?[...]
 - a) This process may take a while.
6. Select the language for the installation and confirm your selection with "Enter".
 - a) You can install server and client in different languages.
 - b) The display of the classification attributes and messages depends, however, on the language selection of the ecoDMS Server component.
7. Read the licence agreement carefully and confirm them.
 - a) Use the Tab key to skip to "OK" and confirm with "Enter".
8. The installation is performed. This operation may take a while.

Important Information for Chapter 6

- [1] *Ensure you make a backup before updating or upgrading. If you wish to upgrade from a previous version to a new major release, please follow the upgrade steps in the new installation manual. For a simple update of the same major release, just install the software over the old version. You must always update all components. Do not mix the components of an earlier ecoDMS version with this version. After an upgrade, a downgrade is only possible to an older ecoDMS version when there is a full backup of the previous version.*
- [2] *If ecoDMS has been uninstalled and you want to reinstall, the computer must be restarted first.*
- [3] *The database folder (postgresql) must not contain any spaces, umlauts or special characters and must be located on a local hard disk. To do so, do not use a network drive or an NAS drive (no share folder). If postgresql is already installed, the installation of the ecoDMS server does not create a new instance. A new database (ecodms) is created in the existing instance. If postgresql was installed manually, you must disable the postgresql installation when the ecoDMS server is installed afterwards. If postgresql was installed manually, ensure that it was the postgresql version supported by ecoDMS (postgresql 9.3.X - 32bit). During the installation, the access data for the existing postgresql database is requested. If the existing postgresql version does not match the ecoDMS version, postgresql - if not disabled in the ecoDMS installer - is installed parallel to the existing system. If postgresql was installed manually, ensure that the postgre service is started before the ecoDMS server starts. Otherwise the ecoDMS server can not be started.*
- [4] *You can install server and clients in different languages. The view of the classification attributes and messages depends on the language you have selected for the ecoDMS server component.*

7 Ubuntu / Debian / Raspbian Uninstallations

The following section describes how to uninstall ecoDMS components under Linux distributions [2, 3, 1].

7.1 ecoDMS Server

The following explains the uninstall process of the ecoDMS Server under Linux distributions [2, 3, 1].

1. First, close all Connection Managers and make sure that no user is connected with the server.

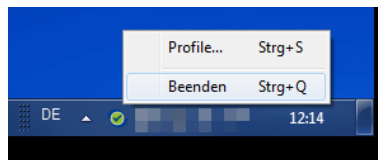


Fig. (similar) 7.1: Exit Connection Manager

2. Open the console.
3. Perform the uninstall process with the following command:

```
sudo apt-get remove ecdmsserver
```

7.2 ecoDMS Client

The following explains the uninstall process of the ecoDMS Client under Linux distributions [1].

1. First, close all Connection Managers and make sure that no user is connected with the server.

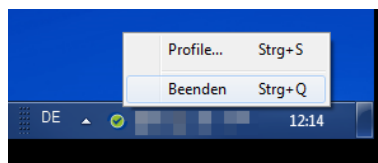


Fig. (similar) 7.2: Exit Connection Manager

2. Open the console.
3. Perform the uninstall process with the following command:

```
sudo apt-get remove ecdmsclient
```

7.3 ecoICE Client

The following explains the uninstall process of the ecoICE Client under Linux distributions [1].

1. First, close all Connection Managers and make sure that no user is connected with the server.

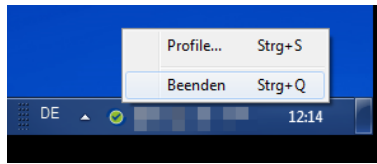


Fig. (similar) 7.3: Exit Connection Manager

2. Open the console.
3. Perform the uninstall process with the following command

```
sudo apt-get remove ecoice
```

7.4 ecoDMS PDF/A Printer

The following explains the uninstall process of the ecoDMS PDF/A Printer under Windows [1].

1. First, close all Connection Managers and make sure that no user is connected with the server.

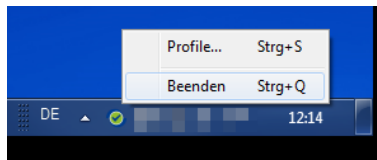


Fig. (similar) 7.4: Exit Connection Manager

2. Open the console.
3. Perform the uninstall process with the following command:

```
sudo apt-get remove ecodmsprinter
```

Important Information for Chapter 7

- [1] *Ensure you make a backup before updating or upgrading. If you wish to upgrade from a previous version to a new major release, please follow the upgrade steps in the new installation manual. For a simple update of the same major release, just install the software over the old version. You must always update all components. Do not mix the components of an earlier ecoDMS version with this version. After an upgrade, a downgrade is only possible to an older ecoDMS version when there is a full backup of the previous version.*
- [2] *If ecoDMS has been uninstalled and you want to reinstall, the computer must be restarted first.*
- [3] *If the installation is a standard installation (ecoDMS Server (ecoSIMS) including database via the ecoDMS installer) and you delete ecoDMS server components, all ecoDMS data is also deleted irrevocably. You can only restore all the archived files, information settings etc. if you created a comprehensive and clean backup of the entire database before uninstalling. Without a backup you will not be able to restore your data after uninstalling.*

8 NAS / Docker Installations

The following section describes how to install the available ecoDMS components on a NAS (Network Attached Storage).

- Ensure you create a backup before updating or upgrading.
- If you wish to upgrade from a previous version to the current major release, please follow the upgrade steps.
- You must always update all components.

8.1 Important NAS Fundamentals

Please note the following information regarding NAS installations.

8.1.1 Licence for a New Container

If you are already using an ecoDMS licence for the full version and also want to use this licence for the Docker container, you must deactivate the licence first. Otherwise you cannot activate the new container. Please follow the steps for deactivation and activation, as shown in the ecoDMS manual.

8.1.2 License for a Container Update

If you want to update the Docker container, the existing ecoDMS licence becomes invalid. Before updating the container, all active licences must therefore be deactivated. Otherwise activation following an update is no longer possible. Please follow the steps for deactivation and activation, as shown in the ecoDMS manual.

8.2 Synology Installation (ecoDMS Server)

The following section describes how to install the available ecoDMS components on a Synology NAS (Network Attached Storage).

8.2.1 Install & Open Docker

Install the Docker app in the Package Centre of your Synology system and then open the application.

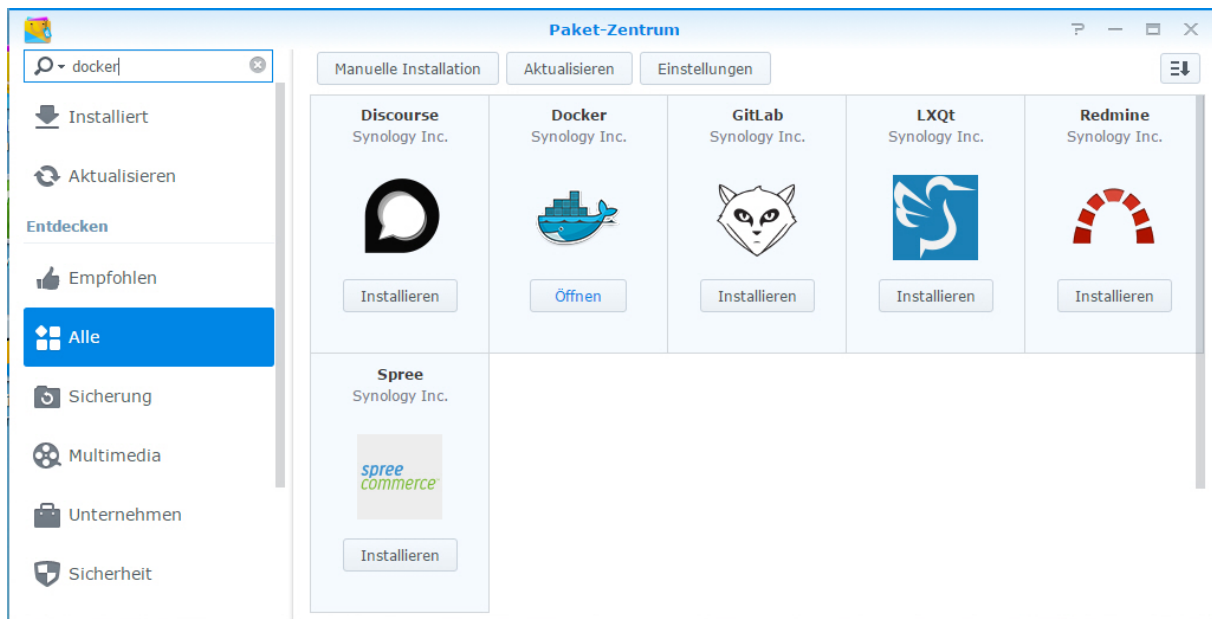


Fig. (similar) 8.1: Synology - Package Centre

8.2.2 Search & Install the ecoDMS Images

1. In the Registration area of the Docker app, search for the ecoDMS image with the name "ecodms/allinone".
2. Then install the package by
 - a) right-clicking the "image" and
 - b) then clicking "Download This Image".
 - c) **If you have already installed a package, delete the local image "ecodms/allinone" before installing the new image. Otherwise "Docker" will install the local image without including any interim updates.**

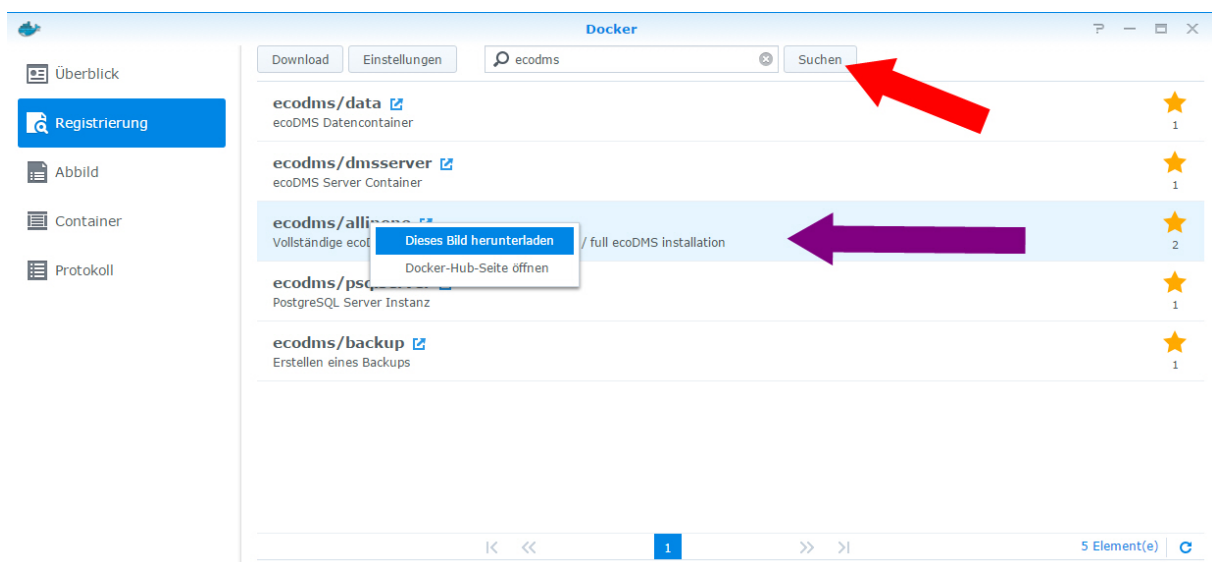


Fig. (similar) 8.2: Synology - Docker - ecoDMS Image

8.2.3 Create Container

1. In the next step, create the container with the wizard.

2. Select the ecoDMS file in the "Image" area.
3. Now click "Start".

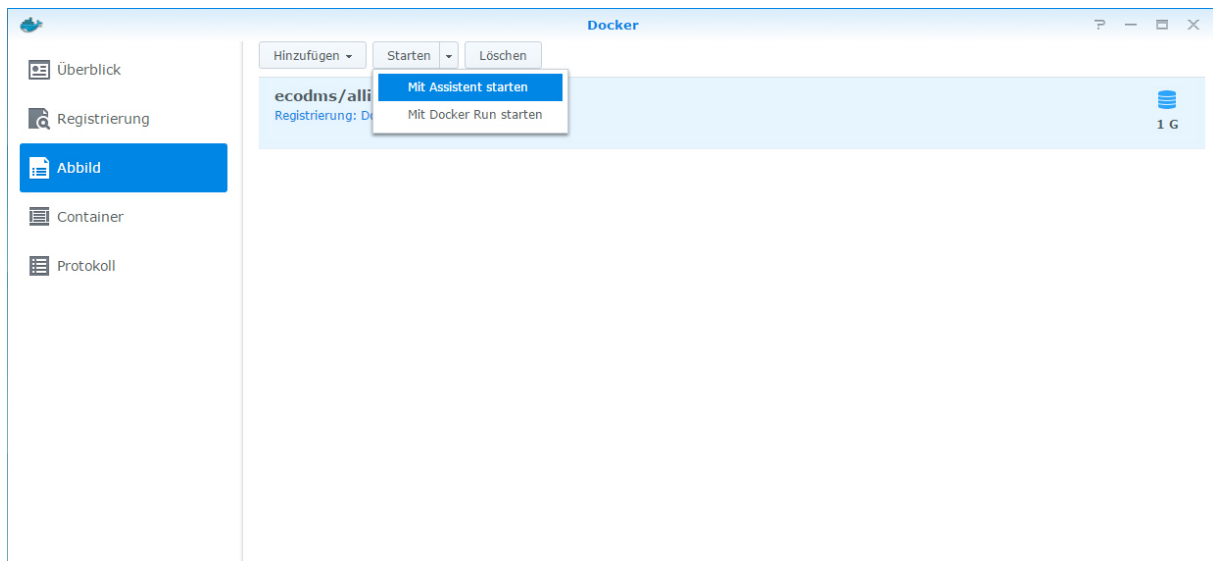


Fig. (similar) 8.3: Synology - Create Container

8.2.4 Container Settings

1. In the next step assign a name to the container. Here you can enter, for example, ecoDMS.
2. Now you can make the "Port Settings". The following figure shows an example for the configuration of "port forwarding".
 - a) Container port: 8180 (API) → External access via port 17005
 - b) Container port: 8080 (web interface) → External access via port 17004
 - c) Container port: 17002 (PostgreSQL) → External access via port 17002 (d)
 - d) Container port: 17001 (ecoDMS) → External access via ecoDMS connection manager (17001)
3. Click "Next" to continue.

ecodms/allinone(latest) - Container erstellen

Schritt 1

Containername:

Port-Einstellungen:

+ -

Lokaler Port	Container-Port	Typ
17005	8180	TCP
17004	8080	TCP
17002	17002	TCP
17001	17001	TCP

Ports automatisch zuordnen (Container-Portbereich 49153 - 65535)

Fig. (similar) 8.4: Synology - Step 1 - Container Settings

4. In "Step 2" you do not need to make any changes.
 - a) Click "Continue".

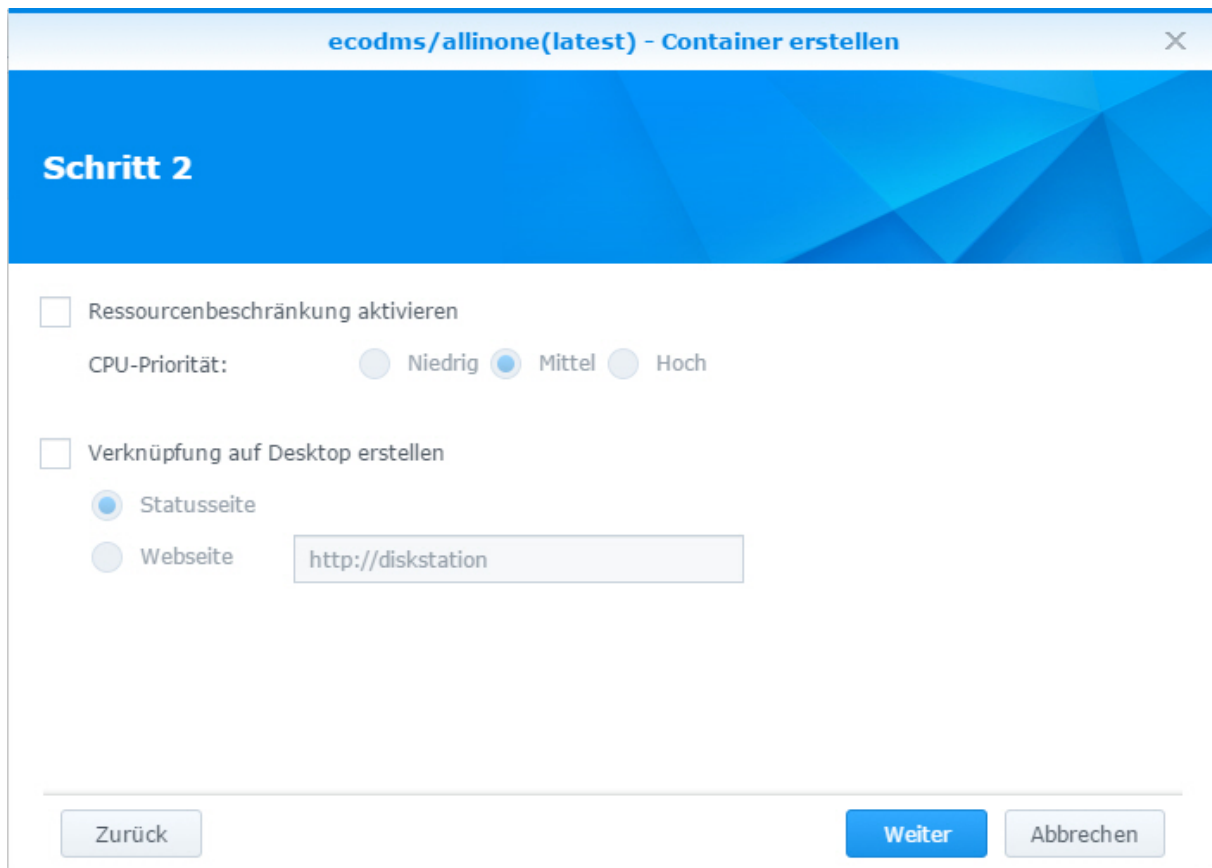
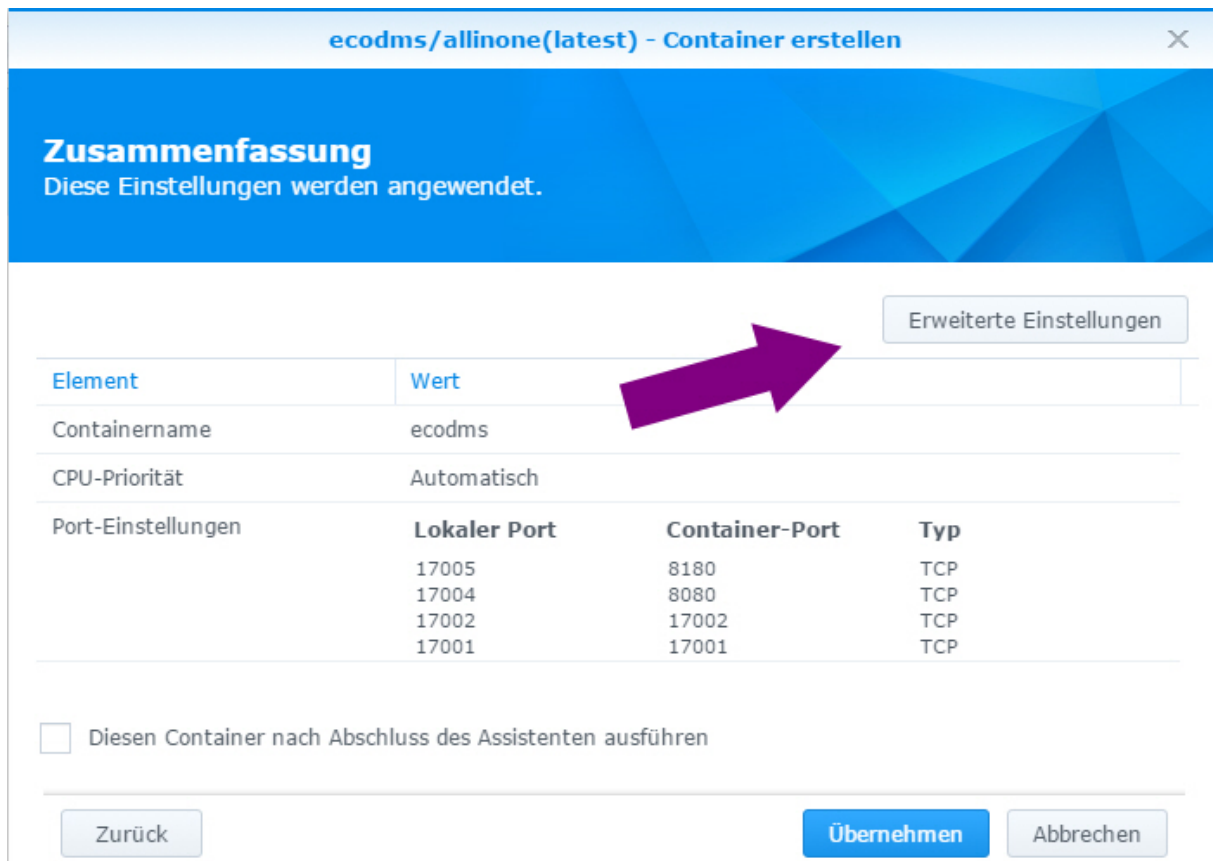


Fig. (similar) 8.5: Synology - Step 2 - Container Settings

8.2.5 Select Data Folder

A window opens displaying your current settings.

1. Click "Extended Settings".



ecodms/allinone(latest) - Container erstellen

Zusammenfassung
Diese Einstellungen werden angewendet.

[Erweiterte Einstellungen](#)

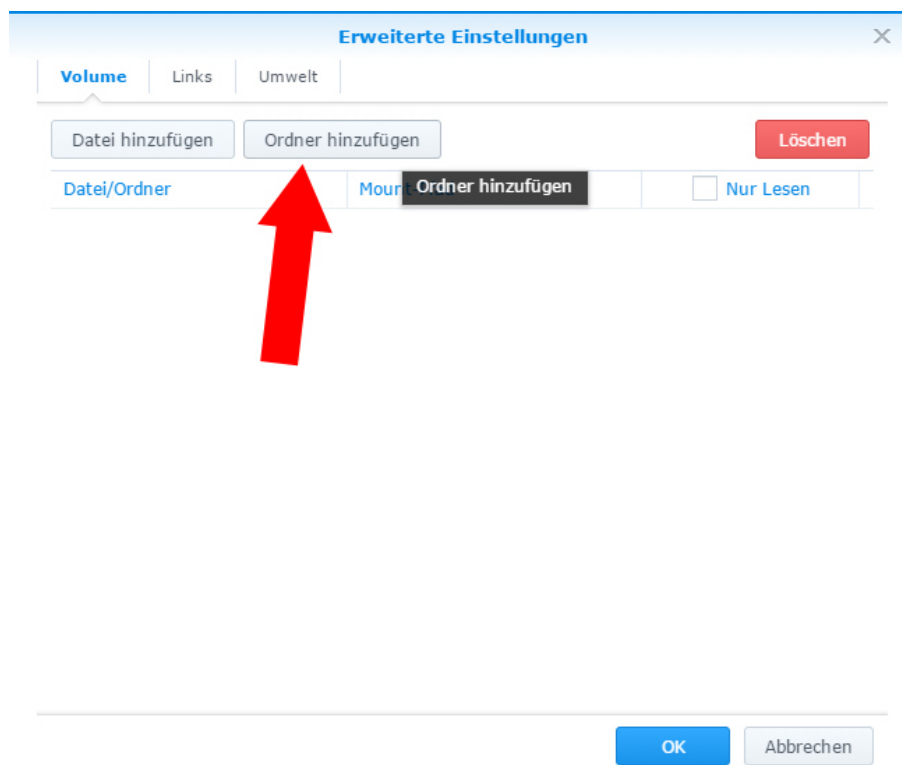
Element	Wert															
Containername	ecodms															
CPU-Priorität	Automatisch															
Port-Einstellungen																
	<table border="1"><thead><tr><th>Lokaler Port</th><th>Container-Port</th><th>Typ</th></tr></thead><tbody><tr><td>17005</td><td>8180</td><td>TCP</td></tr><tr><td>17004</td><td>8080</td><td>TCP</td></tr><tr><td>17002</td><td>17002</td><td>TCP</td></tr><tr><td>17001</td><td>17001</td><td>TCP</td></tr></tbody></table>	Lokaler Port	Container-Port	Typ	17005	8180	TCP	17004	8080	TCP	17002	17002	TCP	17001	17001	TCP
Lokaler Port	Container-Port	Typ														
17005	8180	TCP														
17004	8080	TCP														
17002	17002	TCP														
17001	17001	TCP														

Diesen Container nach Abschluss des Assistenten ausführen

[Zurück](#) [Übernehmen](#) [Abbrechen](#)

Fig. (similar) 8.6: Synology - Extended Container Settings

2. Now click "Add Folder".



Erweiterte Einstellungen

Volume | Links | Umwelt

[Datei hinzufügen](#) [Ordner hinzufügen](#) [Löschen](#)

Datei/Ordner	Mount	Ordner hinzufügen	<input type="checkbox"/> Nur Lesen

[OK](#) [Abbrechen](#)

Fig. (similar) 8.7: Synology - Extended Container Settings - Add Folder

3. Now select the location where you want to save your ecoDMS data.

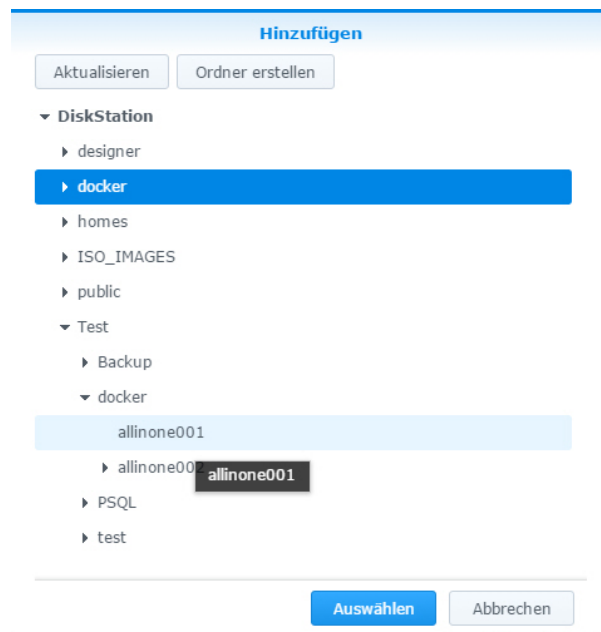


Fig. (similar) 8.8: Synology - Extended Container Settings - Target Path

4. It is important that

- you have selected `"/srv/data"` as "mount path" for the container and
- the "Read only" restriction is disabled.
- the "Administrators" group has read and write access to the selected permission.

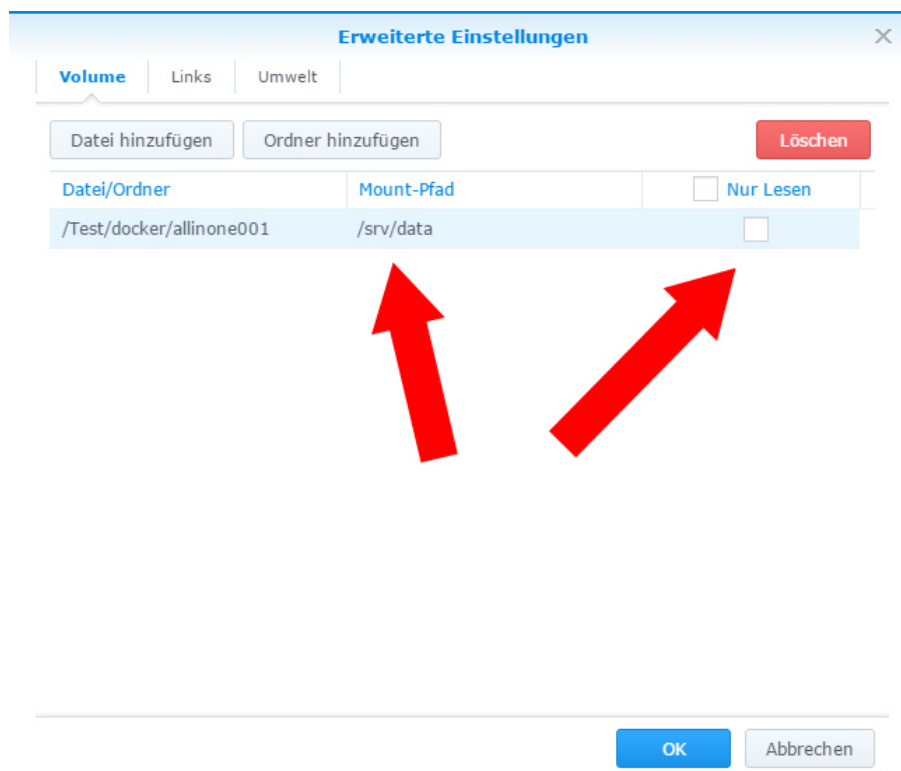


Fig. (similar) 8.9: Synology - Extended Container Settings - Volume

8.2.6 Scaninput Folder

To use an additional "volume" for the Scaninput, complete the following steps:

1. Requirement: Update to the latest container version.
 - a) When starting the container, the display should contain the following text (example):
 - i. "###INFO### Image created: 2016-02-15-11:26:26 ###INFO###"
2. Create a "new common folder".

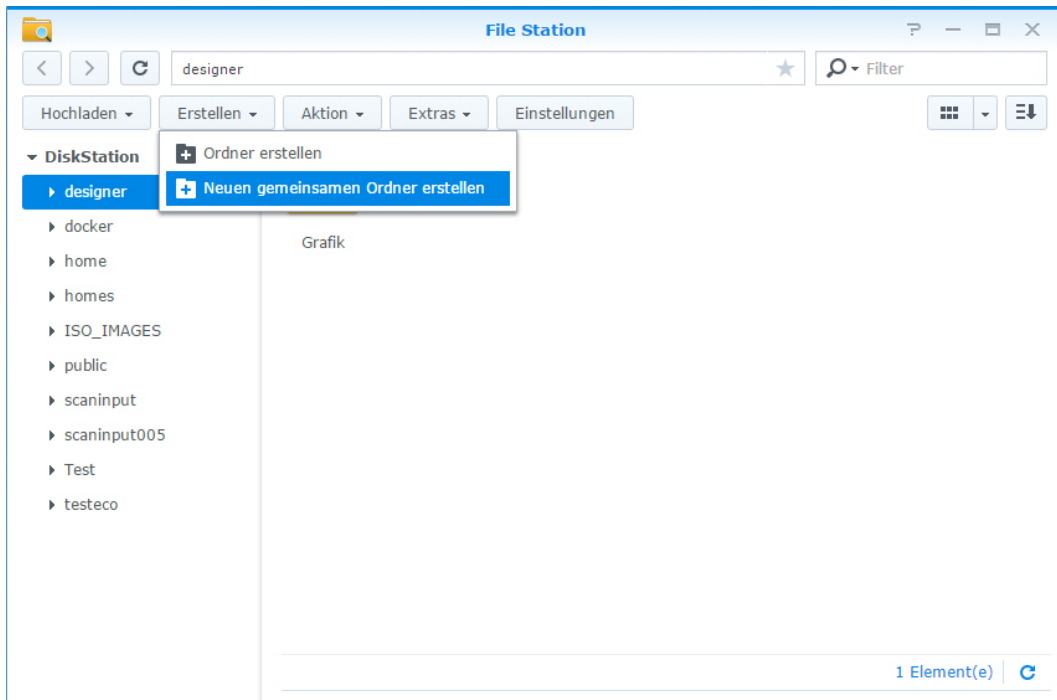


Fig. (similar) 8.10: Synology - Create new common folder

3. Assign a name.

Fig. (similar) 8.11: Synology - Assign Folder Name

4. Assign the permissions for the Admin user and any number of other users.

Name	Kein Zugriff	Lesen/Schreiben	Nur Lesen	Benutzerdefiniert
admin	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Beate Tester	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
dmsscanner	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
guest	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
John Doe	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Fig. (similar) 8.12: Synology - Folder Permissions

5. Mount the folder in the container as "Volume".
 - a) Stop the container.
 - b) The mount path in the container is called `/srv/Scaninput`

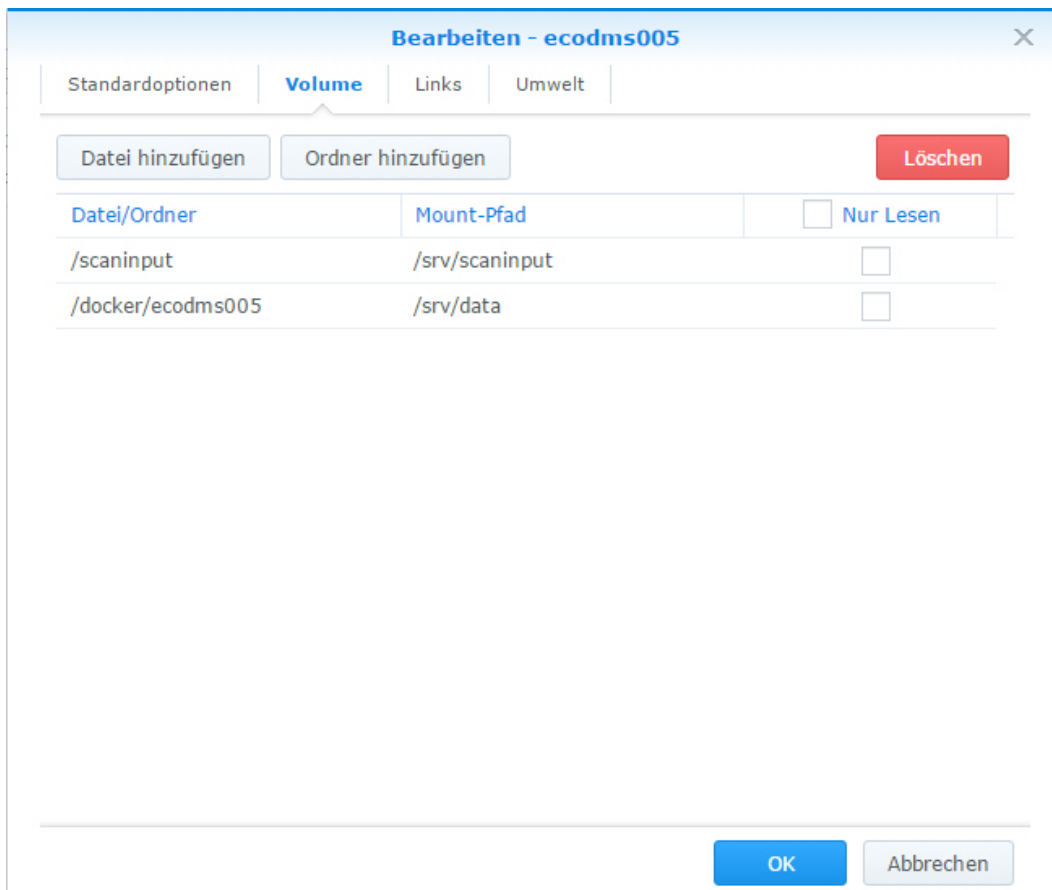


Fig. (similar) 8.13: Synology - Mount Path

6. Start the container.

a) The output should resemble the following figure.

```

10:33:36      ^ Starting domain name service... bind9 [806]
10:33:36      ##INFO## Image wurde erzeugt: 2016-02-15-11:26:26 ##INFO##
10:33:36      user ecodms exists
10:33:36      PSQL database exists
10:33:36      Workdir exists
10:33:36      Linking Scaninput to /srv/scaninput
10:33:36      mv: cannot stat '/srv/data/workdir/scaninput/*': No such file or directory
10:33:37      Starting ActiveMQ Broker...
10:33:37      Removed stale pid file: /opt/activemq/bin/linux-x86-64/./ActiveMQ.pid
10:33:38      warte auf Start des Servers.... fertig
10:33:38      Server gestartet

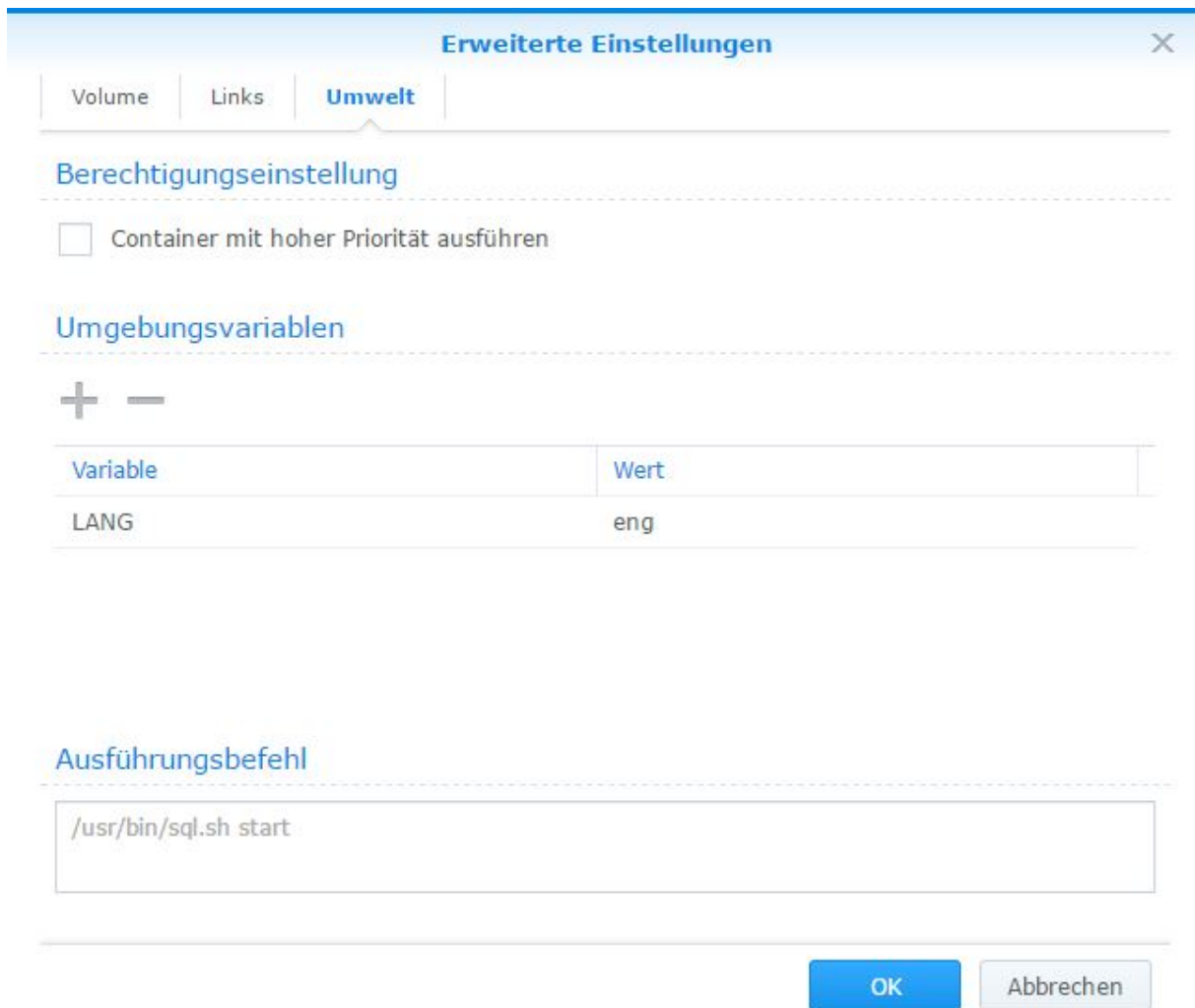
```

Fig. (similar) 8.14: Synology - Start Container (Output)

8.2.7 Change Language (English)

As an option, you can change the language from german to english. To do so, enter the following environment variable under "environment" in the extended container settings when creating a container [1]:

```
LANG=eng
```



The screenshot shows the 'Erweiterte Einstellungen' (Advanced Settings) dialog box in Synology's interface, with the 'Umwelt' (Environment) tab selected. The dialog is divided into three sections: 'Berechtigungseinstellung' (Permission Settings), 'Umgebungsvariablen' (Environment Variables), and 'Ausführungsbefehl' (Execution Command). In the 'Berechtigungseinstellung' section, there is an unchecked checkbox for 'Container mit hoher Priorität ausführen' (Run container with high priority). The 'Umgebungsvariablen' section features a table with two columns: 'Variable' and 'Wert' (Value). One variable is listed: 'LANG' with the value 'eng'. There are '+' and '-' icons above the table to add or remove variables. The 'Ausführungsbefehl' section contains a text input field with the command '/usr/bin/sql.sh start'. At the bottom right, there are two buttons: 'OK' (blue) and 'Abbrechen' (grey).

Variable	Wert
LANG	eng

Fig. (similar) 8.15: Synology - Extended Settings - Change Language

8.2.8 Start Container

After you have successfully created the container, you can start it in the "Docker" interface in the "Container" area.

1. You can connect to ecoDMS via the selected port (here: 17001; refer to the section "Container Settings") at the address of the disk station.
2. Upon initial starting, it may take a while until the system can access ecoDMS.

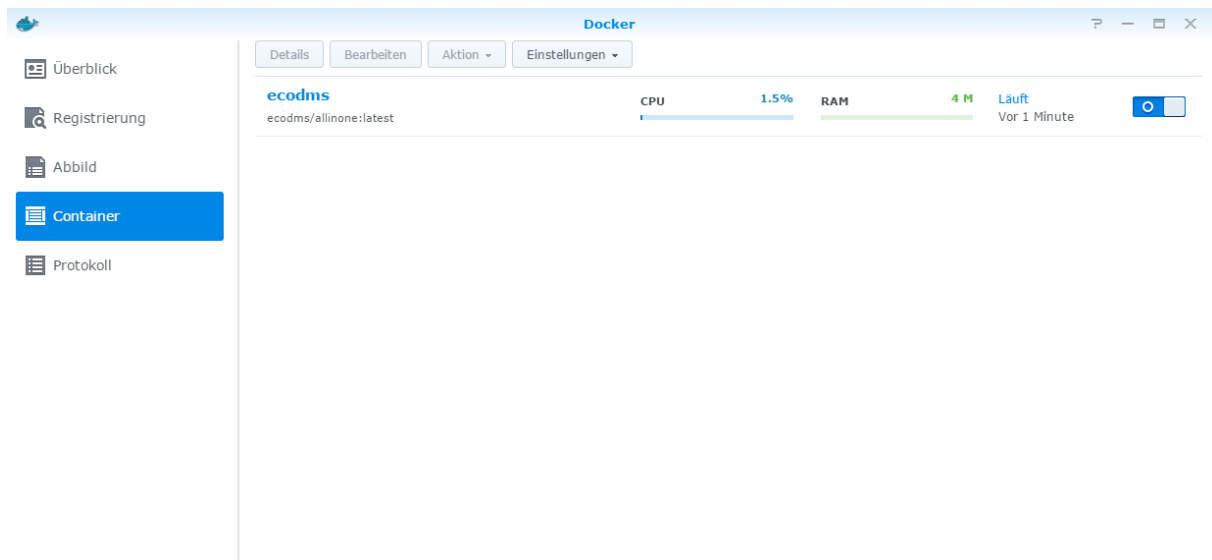


Fig. (similar) 8.16: Synology - Start Container

8.2.9 Update Container

If an ecoDMS container is already setup, you can update it as follows:

- To update a container, **delete** the **existing container** and the **local image** of the installation.
- Then create the new container with the **same data folder**.
- Befolgen Sie hierzu die zuvor beschriebenen Schritte ab dem Abschnitt "Container erstellen".

8.3 QNAP Installation (ecoDMS Server)

The following section describes how to install the available ecoDMS components on a QNAP NAS (Network Attached Storage).

8.3.1 Install & Open ContainerStation

In the AppCentre of your "QNAP system", install the "ContainerStation" app and then open the application.

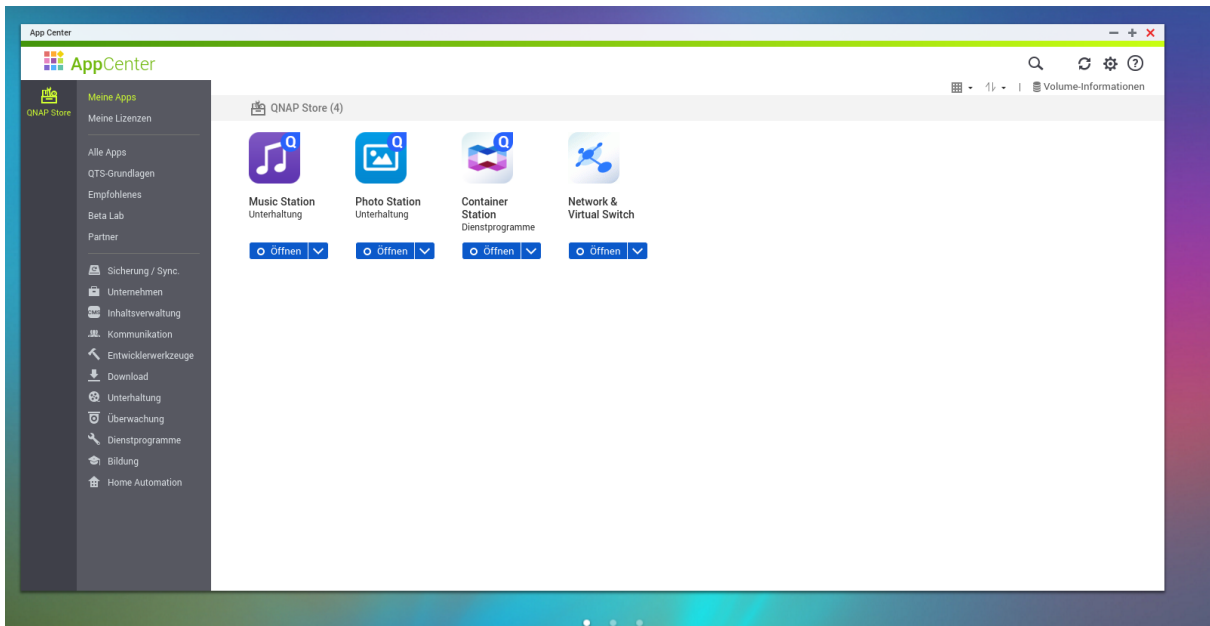


Fig. (similar) 8.17: QNAP - AppCenter - Installation ContainerStation

8.3.2 Search & Install the ecoDMS Images

1. In the "ContainerStation" app, search for the "ecoDMS image" with the name "ecodms/allinone".
2. Then install the package by clicking "Create".
 - a) **If you have already installed a package, delete the local image "ecodms/allinone" before installing the new image. Otherwise "ContainerStation" will install the local image without including any interim updates.**

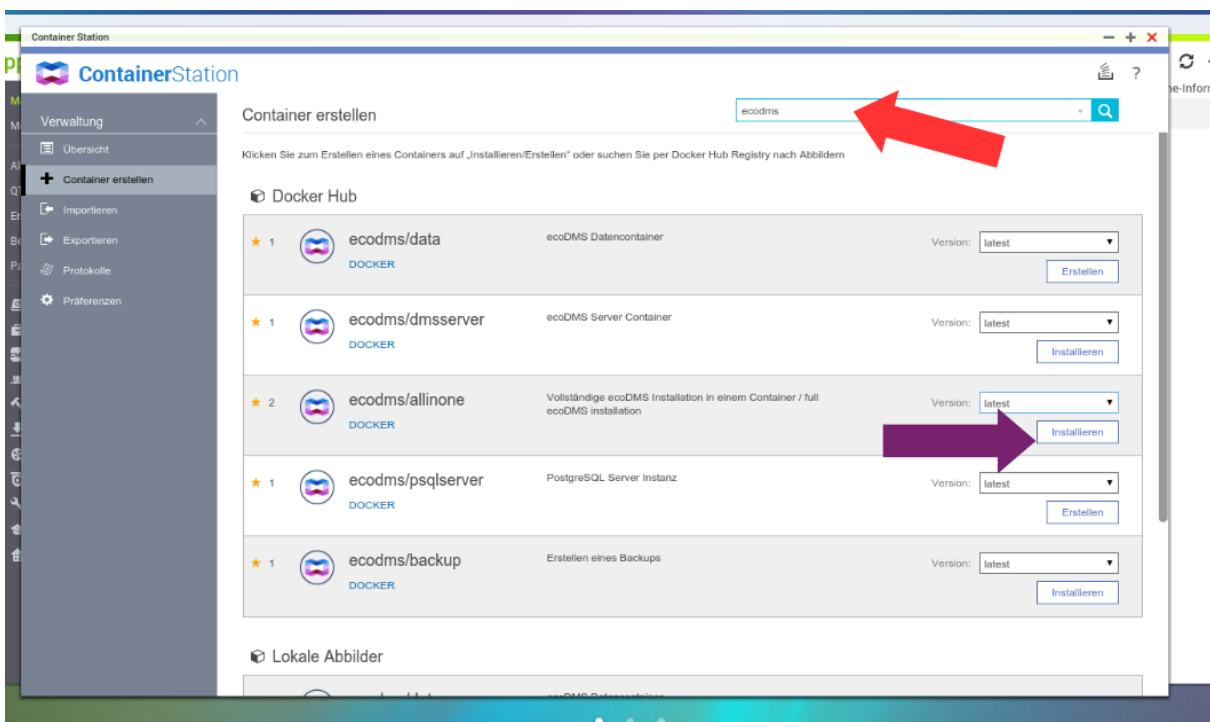


Fig. (similar) 8.18: QNAP - ContainerStation - ecoDMS Image

8.3.3 Container Settings

- **Information:** If you want to setup the "Scaninput" folder at the same time, you must do this when you create the container. You cannot mount Scaninput afterwards.

1. In the next step assign a name to the container. Here you can enter, for example, ecoDMS.

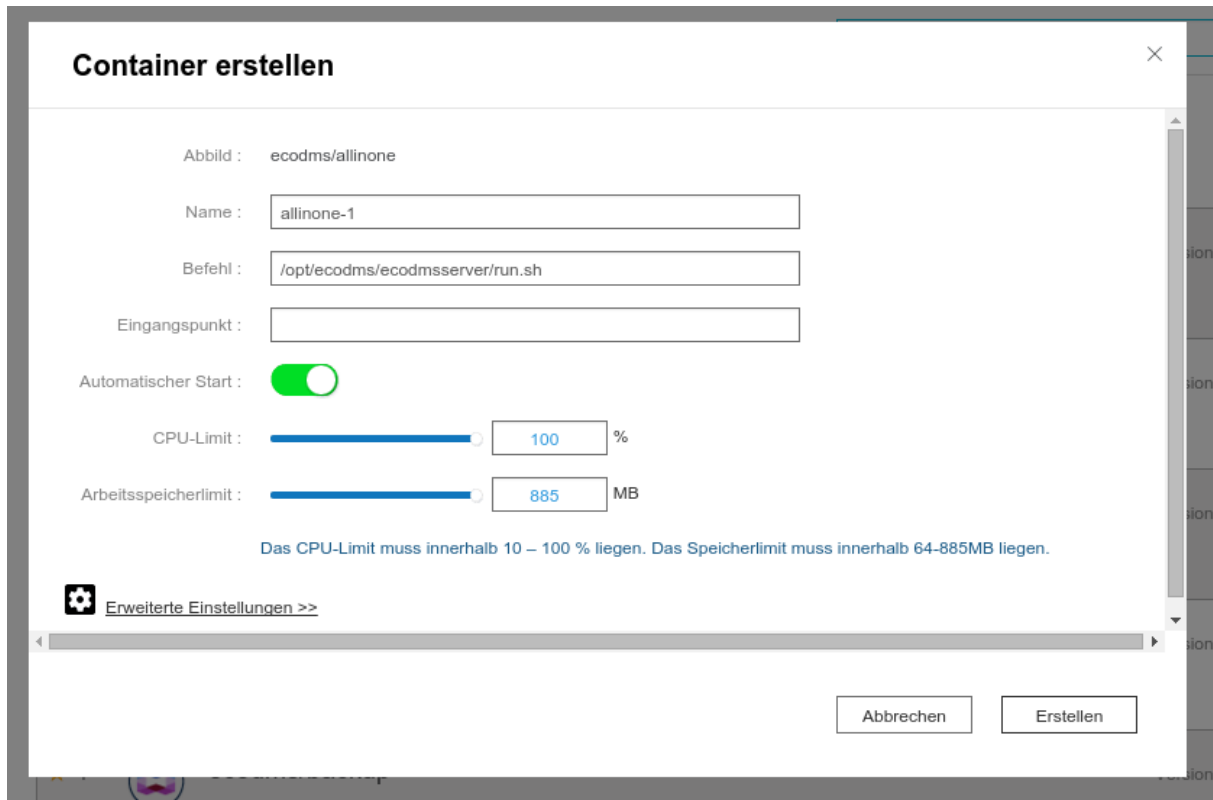


Fig. (similar) 8.19: QNAP - Container Settings

2. Click "Extended Settings".
3. Select the "Network" entry.
4. Now you can make the "Port Settings". The following figure shows an example for the configuration of "port forwarding".
 - a) Container port: 8180 (API) → External access via port 17005
 - b) Container port: 8080 (web interface) → External access via port 17004
 - c) Container port: 17002 (PostgreSQL) → External access via port 17002
 - d) Container port: 17001 (ecoDMS) → External access via ecoDMS connection manager (17001)
5. Then click "Freigabe..." in the Container window.

Container erstellen

Erweiterte Einstellungen >>

Link

Umgebung

Netzwerk

Gerät

Freigabe...

Hostname

Netzwerkmodus

Standard-NAS-Netzwerk nutzen (Befehl: --net=bridge)

Portweiterleitung

Host	Container	Protokoll
17004	8080	TCP
17005	8180	TCP
17001	17001	TCP
17002	17002	TCP

Abbrechen Erstellen

Fig. (similar) 8.20: QNAP - Extended Container Settings

8.3.4 Change Language (English)

As an option, you can change the language from german to english. To do so, enter the following environment variable under "environment" in the extended container settings when creating a container [1]:

```
LANG=eng
```

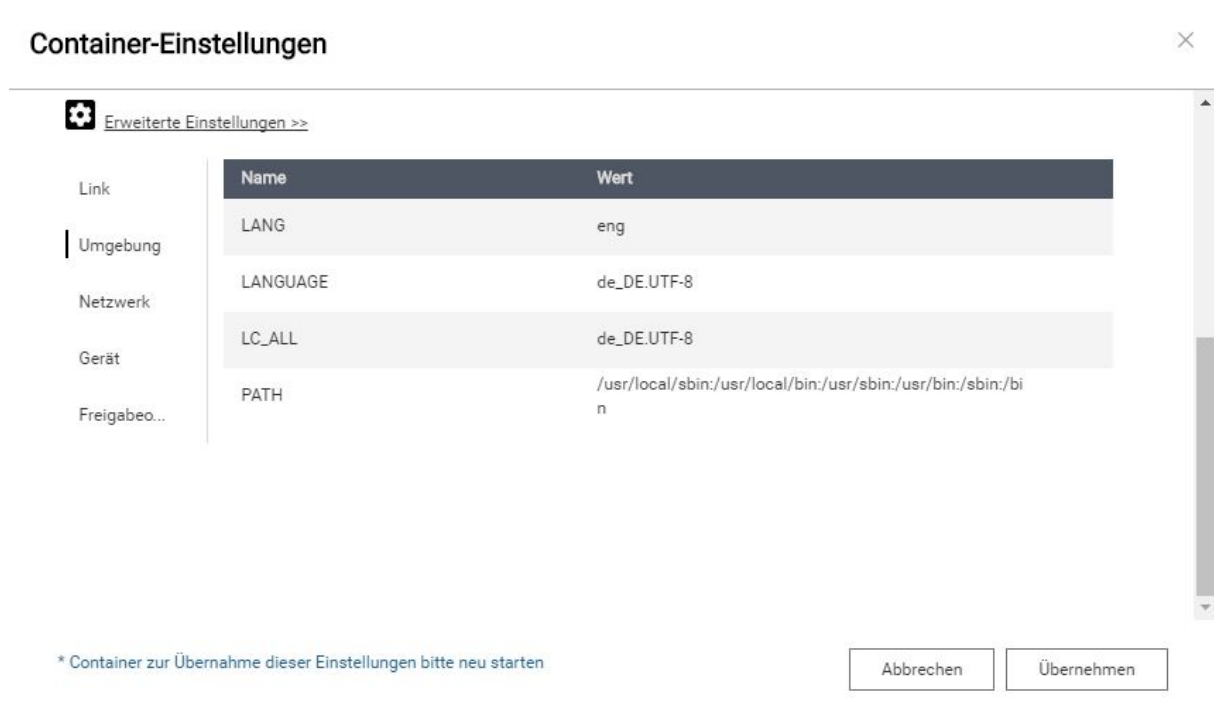


Fig. (similar) 8.21: QNAP - Extended Container Settings - Change Language

8.3.5 Select Data Folder

1. Select the location where you want to save your ecoDMS data in the "Freigabe" area.
2. It is important that
 - a) you have selected `/srv/data` as "mount path" for the container (→"Include point") and
 - b) the "read / write" permissions and
 - c) that the "Administrators" group has **read and write access** to the selected "Freigabe".

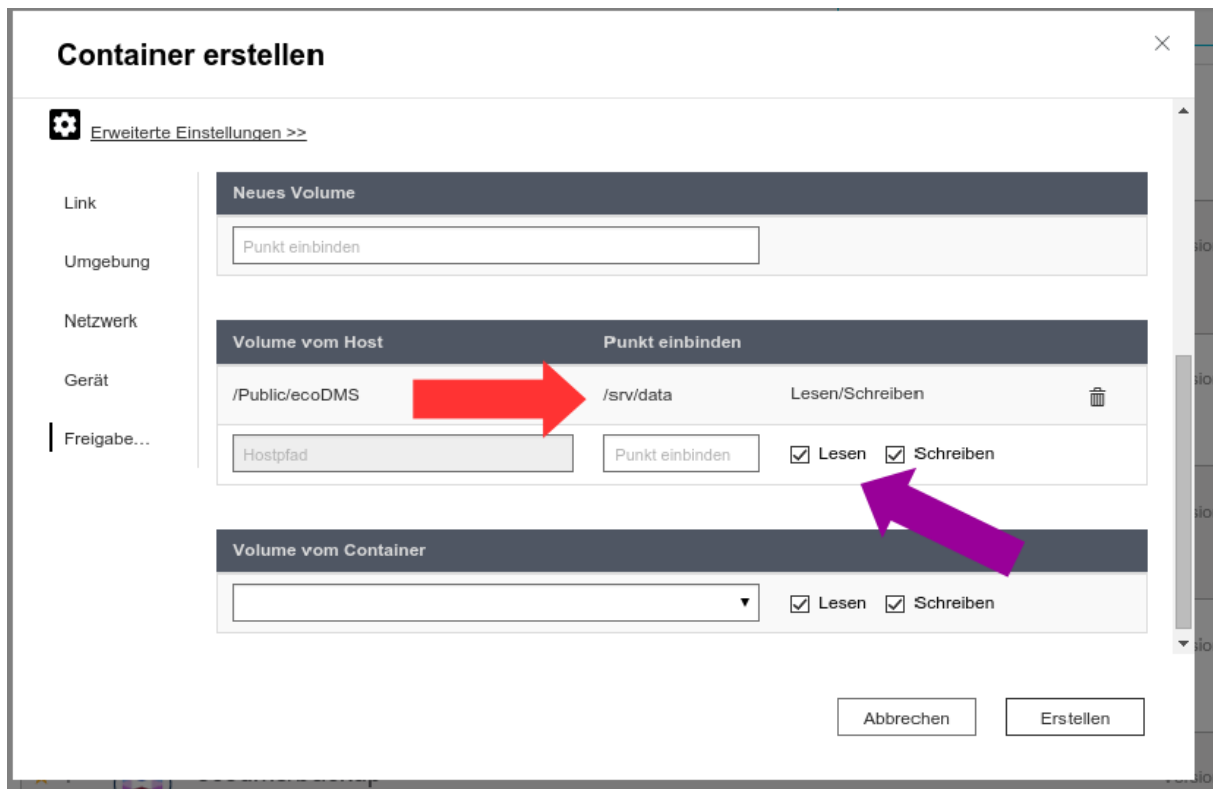


Fig. (similar) 8.22: QNAP - "Freigabe" Container Settings

8.3.6 Scaninput Folder

To use an additional "volume" for the Scaninput, complete the following steps:

1. Requirement: Update to the latest container version.
 - a) When starting the container, the display should contain the following text (example):
 - i. "###INFO### Image created: 2016-02-15-11:26:26 ###INFO###"
2. Create a "Freigabe" folder.

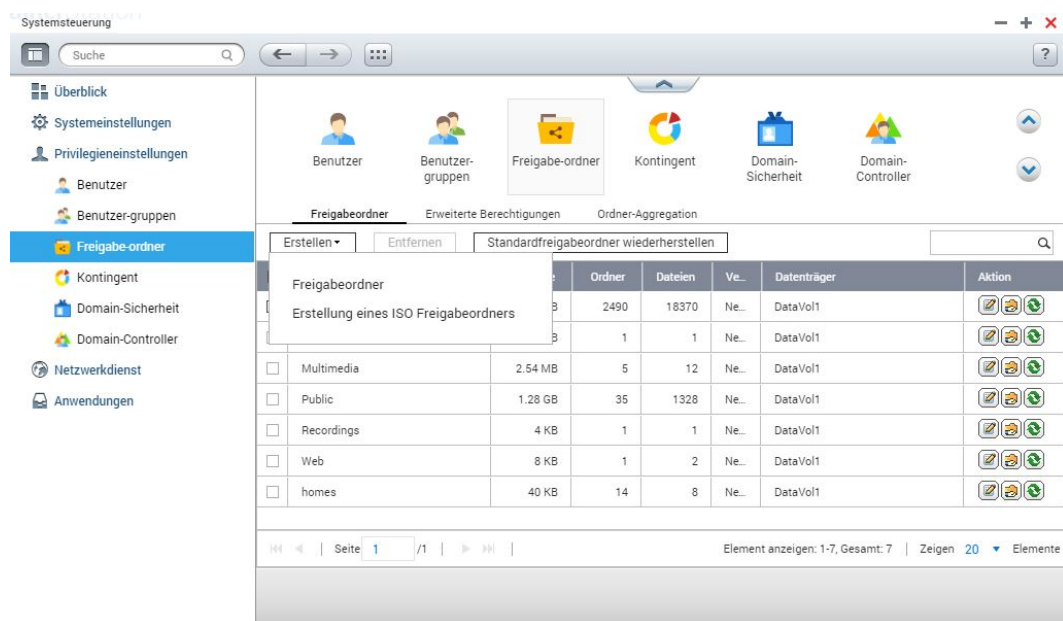


Fig. (similar) 8.23: QNAP - Create "Freigabe" Folder

3. Assign a name.

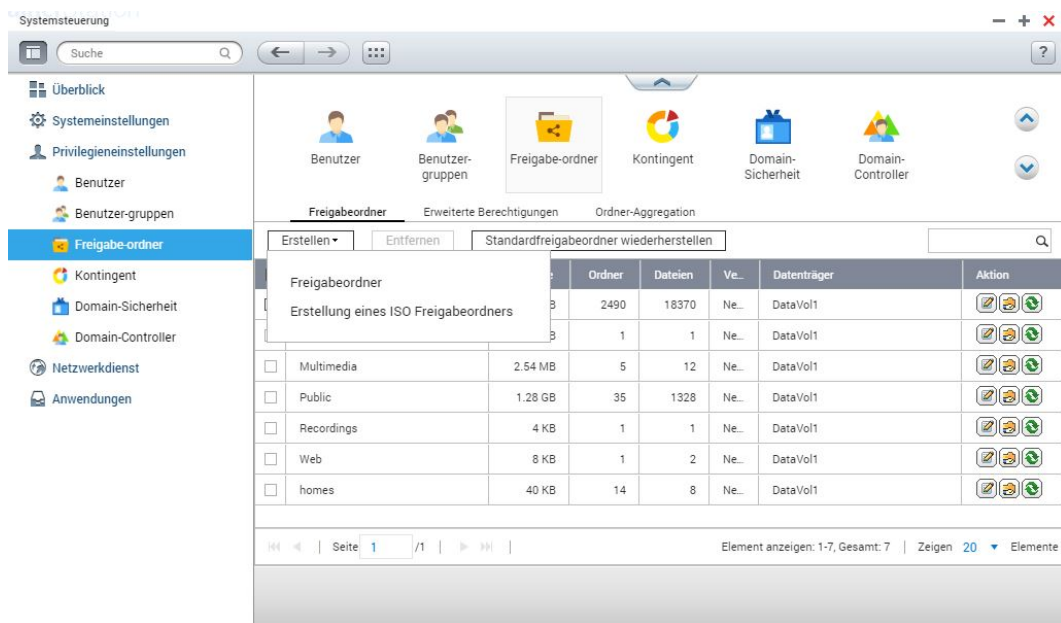


Fig. (similar) 8.24: QNAP - Assign Folder Name

4. Assign the permissions for the Admin user and any number of other users.

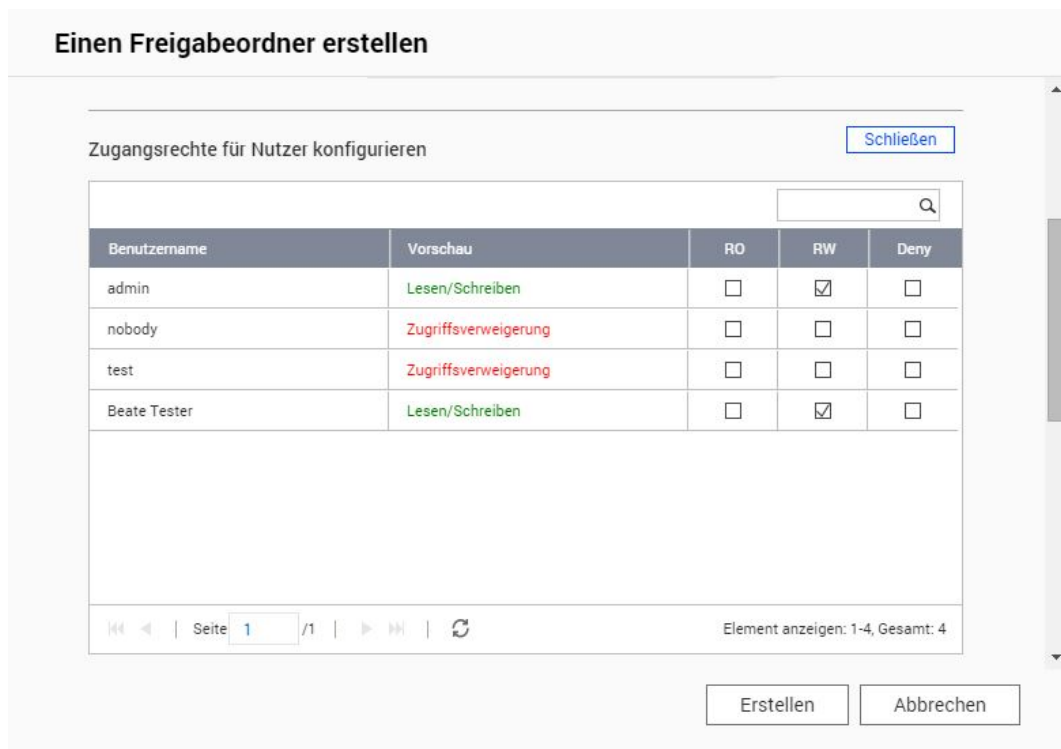


Fig. (similar) 8.25: QNAP - Folder "Freigabe"

5. Mount the folder in the container as "Volume".

- a) The mount path in the container is called /srv/Scaninput

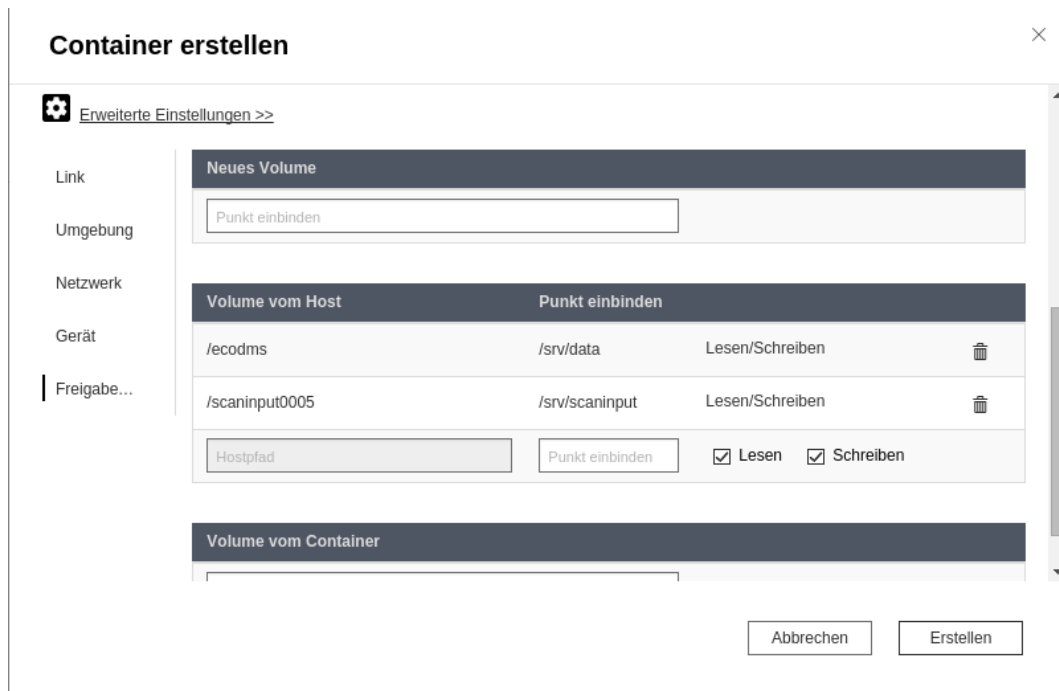


Fig. (similar) 8.26: QNAP - Mount Path

6. Start the container.

a) The output should resemble the following figure.

```

Konsole
-----
PSQL database exists
Workdir exists
Scaninput already points to /srv/scaninput
Starting ActiveMQ Broker...
fertig
Server gestartet
[ecoDMS] active MQ waiting for startup...
"2016-02-26 17:39:09,098[o.a.e.i.ProcessEngineImpl] INFO |ProcessEngine default created
2016-02-26 17:39:09,106[o.a.e.i.j.JobExecutor] INFO |Starting up the JobExecutor[org.activiti.engine.impl.jobexecutor.DefaultJobExecutor]."
"2016-02-26 17:39:09,115[o.a.e.i.j.AcquireJobsRunnable] INFO |JobExecutor[org.activiti.engine.impl.jobexecutor.DefaultJobExecutor] starting to acquire jobs"

```

Fig. (similar) 8.27: QNAP - Start Container (Output)

Important Information for Chapter 8

[1] You can install server and clients in different languages. The view of the classification attributes and messages depends on the language you have selected for the ecoDMS server component.

8.3.7 Start Container

After you have successfully created the container, you can start it in the "ContainerStation" interface.

1. You can connect to ecoDMS via the selected port (here: 17001; refer to the section "Container Settings") at the address of the QNAP.
2. Upon initial starting, it may take a while until the system can access ecoDMS.

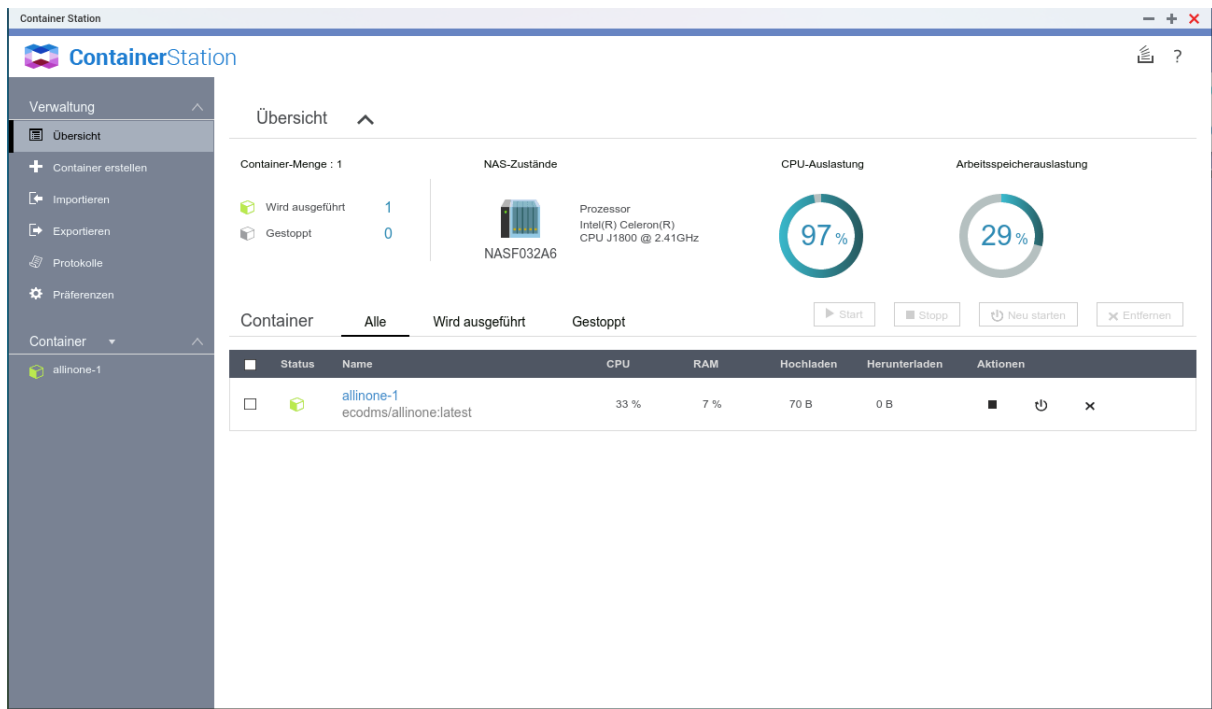


Fig. (similar) 8.28: QNAP - Start Container

8.3.8 Update Container

If an ecoDMS container is already setup, you can update it as follows:

- To update a container, delete the existing container and the local image of the installation.
- Then create the new container with the same data folder.
- Befolgen Sie hierzu die zuvor beschriebenen Schritte ab dem Abschnitt "Container Einstellungen".

8.4 Docker Installation (ecoDMS Server)

To install ecoDMS on Docker, enter the following commands:

```
docker run --restart=always -it -d -p 17001:17001 --name "ecodms" -v /tmp/srv:/srv/data -v /
volume1/scnainput:/srv/scaninput -t ecodms/allinone
```

8.4.1 Docker Details

- With this image all services of ecoDMS run within a container, the data is stored on the external directory.
- You can freely select the directory (/srv/data), but the data in it and its permissions can not be changed.
- You can store your scanned documents via the directory (/srv/scaninput). You can also share the directory via Samba. The content is then collected and processed by ecoDMS.

9 MacOS Installations

The following section describes how to install the available ecoDMS components under MacOS.

9.1 ecoDMS & ecoICE Clients

Use this installation file to install the ecoDMS Archive user interface. Moreover, the Connection Manager and the ecoICE are components of this software package. The following explains the installation process of the ecoDMS and ecoICE Client under MacOS [1].

1. If this installation is an update, close all Connection Managers first and make sure that no user is connected with the server.

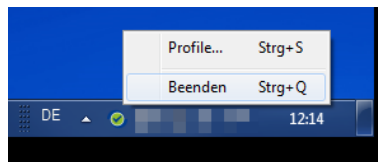


Fig. (similar) 9.1: Exit Connection Manager

2. Download the file for the ecoDMS and ecoICE Client at ecodms.de.
3. If this is a ZIP-file, unzip it first.
4. Execute the installation file "...mpkg".
5. Click "Continue" in the "Introduction Screen".

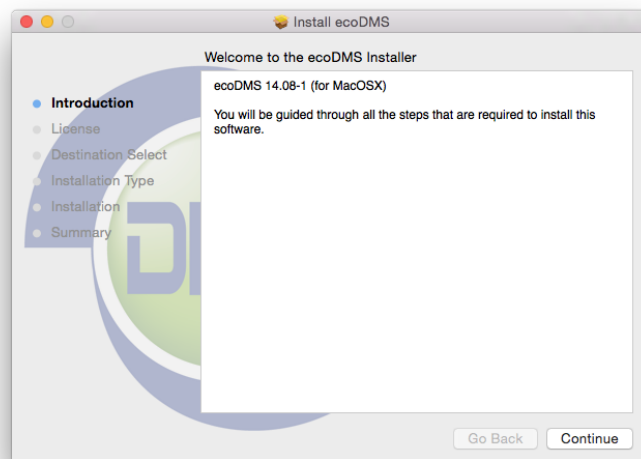


Fig. (similar) 9.2: MacOS Clients: Introduction

6. The next steps are the language and the license agreements.
 - a) Select the language in the "License" Window. You will find a selection box above the license terms.

- i. You can install server and client in different languages.
 - ii. The display of the classification attributes and messages depends, however, on the language selection of the ecoDMS Server component.
- b) Read the licence agreement carefully and click "Continue".

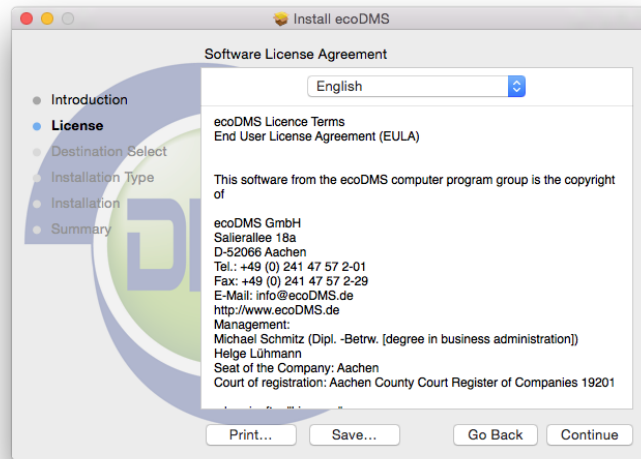


Fig. (similar) 9.3: MacOS Clients: License (Language)

7. Confirm the License agreement with "Agree".

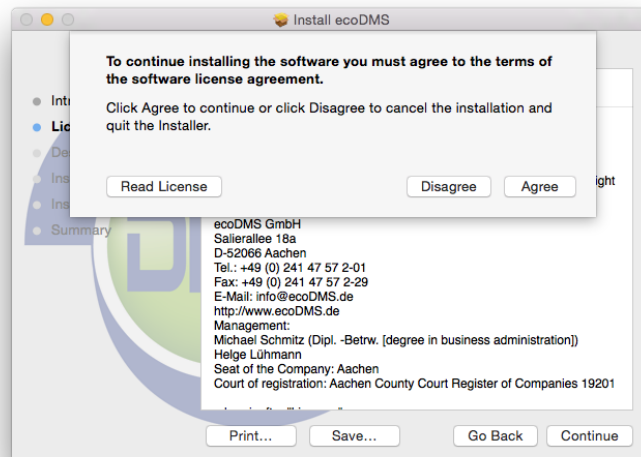


Fig. (similar) 9.4: MacOS Clients: Accept License Agreement

8. Select the the disk where you want to install the ecoDMS software and click "Continue".
9. Click "Install" to start the installation.
 - a) You may be asked to enter your system access data to continue the installation. Enter your MacOS access data and click "Install Software" to start the installation.
 - b) The installation is performed. This operation may take a while.

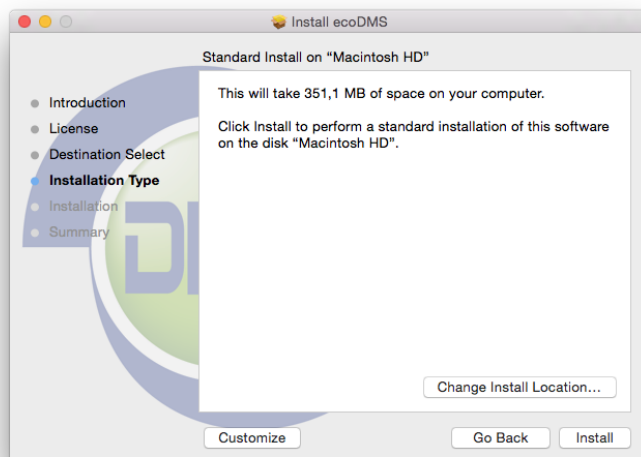


Fig. (similar) 9.5: MacOS Clients: Installation Destination



Fig. (similar) 9.6: MacOS Clients: Enter Access Data

10. The installation is complete. Click "Close".

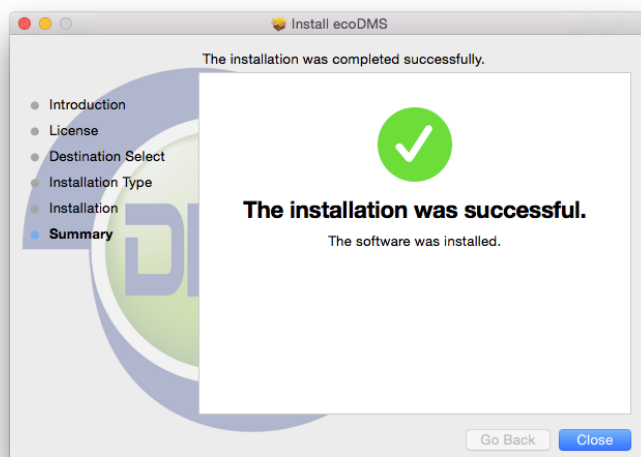


Fig. (similar) 9.7: MacOS Clients: Installation Complete

9.2 ecoDMS Server, PDF/A Printer & MS Office Plugin

The ecoDMS Server and ecoDMS PDF/A Printer are not on offer for Mac due to the lack of demand. The same applies to the MS Office Plugin, for which the interfaces on the Microsoft side are not complete in a MacOS version. In this case, however, you can use the OpenOffice and LibreOffice Addon. We recommend you install the ecoDMS server under a supported Windows or Linux distribution (for example, on a virtual machine) or on a supported NAS device. Then you can access the server with the MacOS clients and setup a connection via the connection manager.

Important Information for Chapter 9

[1] *You can install server and clients in different languages. The view of the classification attributes and messages depends on the language you have selected for the ecoDMS server component.*

10 MacOS Uninstallations

The following section describes how to uninstall ecoDMS components under MacOS.

10.1 ecoDMS & ecoICE Clients

The following explains the uninstall process of the ecoDMS and ecoICE Client under MacOS [1].

1. First, close all Connection Managers and make sure that no user is connected with the server.

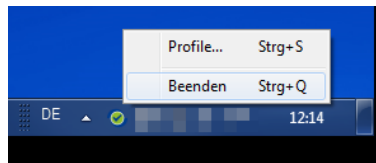


Fig. (similar) 10.1: Exit Connection Manager

2. Open the "Finder" and select the name of your Mac or your MacBook in the left menu bar.
3. Select the internal drive of your computer.
4. Select the "Program files" subfolder. Here you can see all installed programmes.
5. Drag and drop the ecoDMS or ecoICE programme or programme folder into the recycle bin in the dock.
 - a) This uninstalls the programme.
6. If necessary, you can empty the recycle bin later.

Important Information for Chapter 10

- [1] *Ensure you make a backup before updating or upgrading. If you wish to upgrade from a previous version to a new major release, please follow the upgrade steps in the new installation manual. For a simple update of the same major release, just install the software over the old version. You must always update all components. Do not mix the components of an earlier ecoDMS version with this version. After an upgrade, a downgrade is only possible to an older ecoDMS version when there is a full backup of the previous version.*

11 Install Plugins & Addons

The following section describes how to install the available ecoDMS Plugins and Addons. Please note the system requirements and supported operating systems.

11.1 Microsoft Office Plugin

Use this installation file to install the ecoDMS MS Office Plugin. Then you can archive directly from the supported Office applications via the plugin. The following explains the installation process of the ecoDMS MS Office Plugin under Windows [1, 2, 4, 3].

1. **Please exit all MS Office Programs before the installation.**
2. Download the file for the MS Office Plugin at ecodms.de.
3. If this is a ZIP-file, unzip it first.
4. Execute the installation file "setup.exe".
 - a) Attention!!! Execute the **"setup.exe"** file and not the "ecoDMSOfficePluginSetup.msi" file.
5. In the first step you must accept the licence agreement for Microsoft .NET Framework.
 - a) To do so, click "I accept."
 - b) If this Framework is already installed on your computer, the setup skips this step.

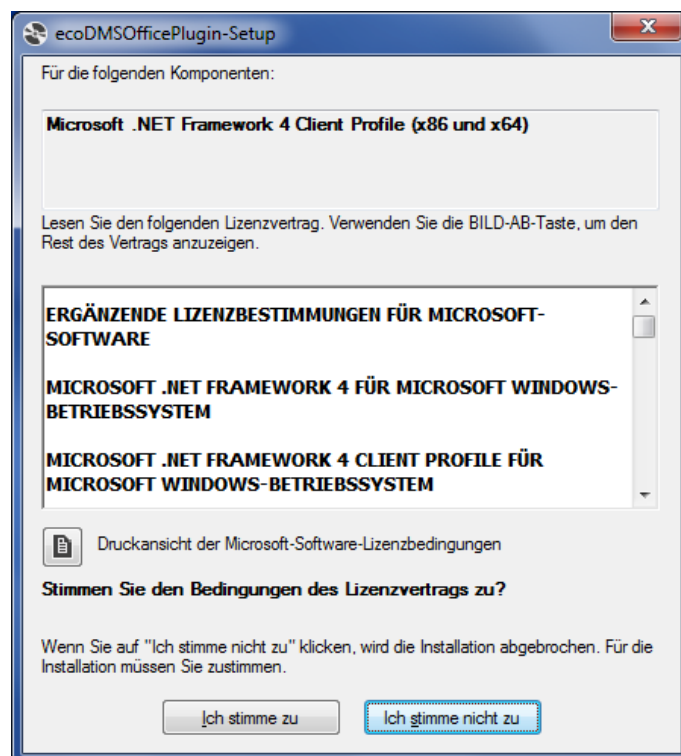


Fig. (similar) 11.1: MS Office Plugin - License: Framework

6. The "Framework" installation follows.
 - a) This process may take a while.

b) If this "Framework" is already installed on your computer, the setup skips this step.

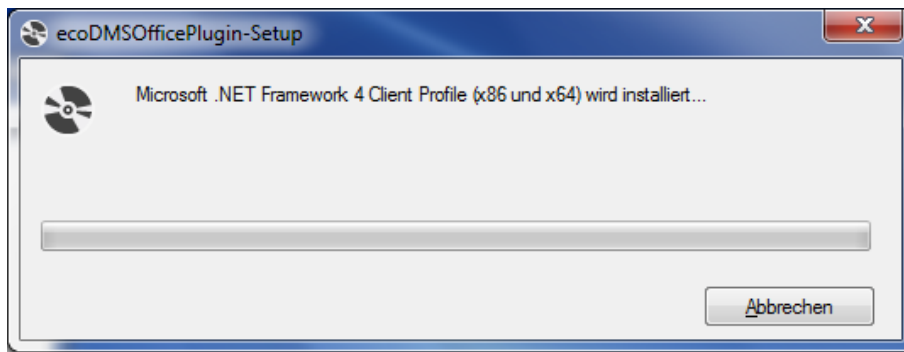


Fig. (similar) 11.2: MS Office Plugin - Installation Framework

7. The setup wizard for the actual plugin installation opens. Click "Next".



Fig. (similar) 11.3: MS Office Plugin - Start Setup Wizard

8. Read the licence agreement carefully and tick the checkbox "I accept the terms of the licence agreement". Click "Next" to continue.

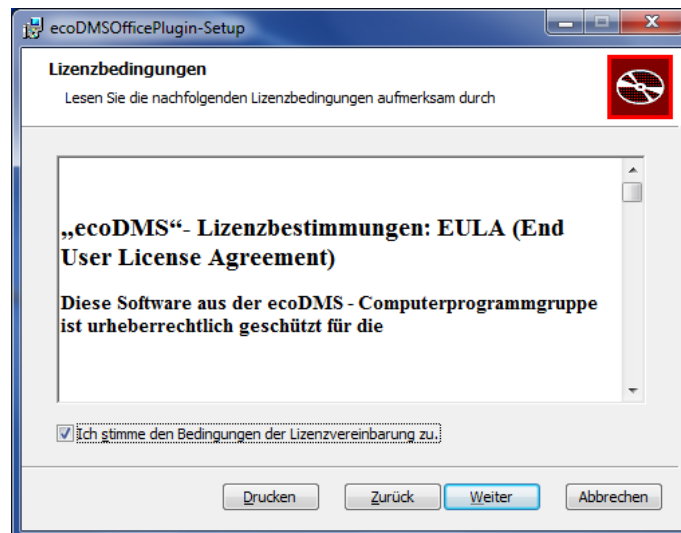


Fig. (similar) 11.4: MS Office Plugin - ecoDMS License Agreement

9. Select the installation folder. You can change the suggested folder by clicking "Change".

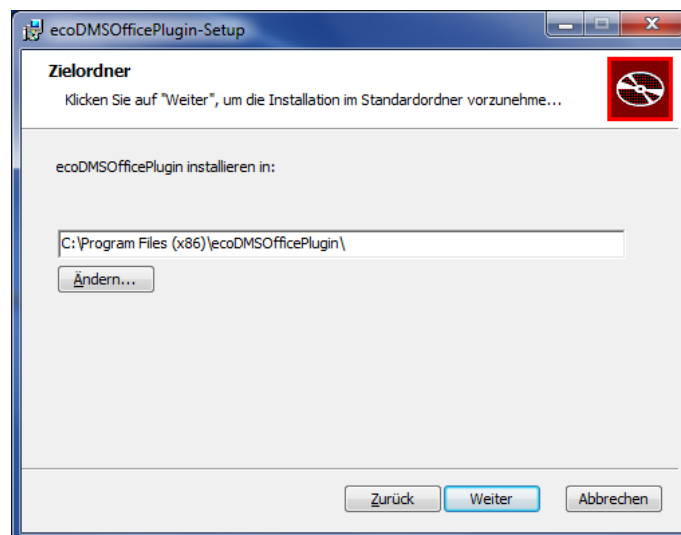


Fig. (similar) 11.5: MS Office Plugin - Installation Destination

10. Click "Install" to start the installation.



Fig. (similar) 11.6: MS Office Plugin - Start Installation

11. The installation is performed. This operation may take a while.

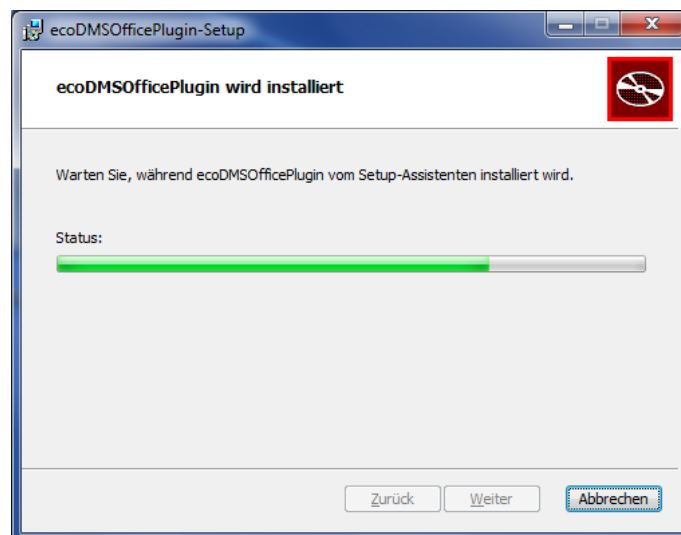


Fig. (similar) 11.7: MS Office Plugin - Installation

12. The installation is complete. Click "Finish".

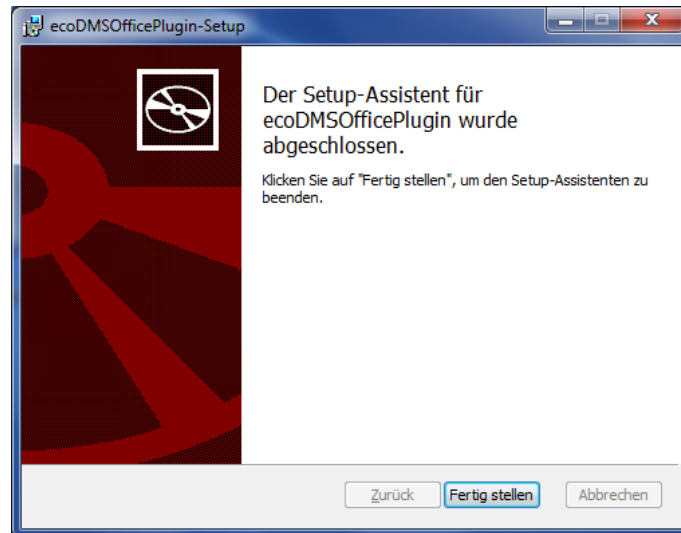


Fig. (similar) 11.8: MS Office Plugin - Installation Complete

13. You can restart the MS Office Programs now.

11.2 Libre- & OpenOffice Addon

You can import this ecoDMS addon directly in LibreOffice / OpenOffice through the Extension Manager. Then you can archive directly from the supported Office applications via the addon. Please note that Java must be enabled in Office. The following explains the installation process of the ecoDMS addon for LibreOffice and Open Office under Windows, Linux distribution and MacOS [1, 2, 4, 3].

11.2.1 Java Activation

To install and use the ecoDMS Office addon, Java must be enabled in LibreOffice / OpenOffice. To do this, complete the following steps [1, 2, 4, 3]:

1. Start one of the Office Programs.
2. Extras -> Options
3. LibreOffice -> Extended
4. Java Options: Enable the option "Use a Java Runtime environment".
5. Select the manufacturer.
 - a) If you do not have a Java installation on your device, you must install this before installing the ecoDMS addon. You can download Java for free from the internet.
 - b) In this case the notes, information, licence conditions and system requirements of the manufacturer apply.
 - c) To use the java plugins under Ubuntu / Debian, please install the package "libreoffice-java-common".

```
sudo apt-get install libreoffice-java-common
```

6. Confirm the message with "OK".

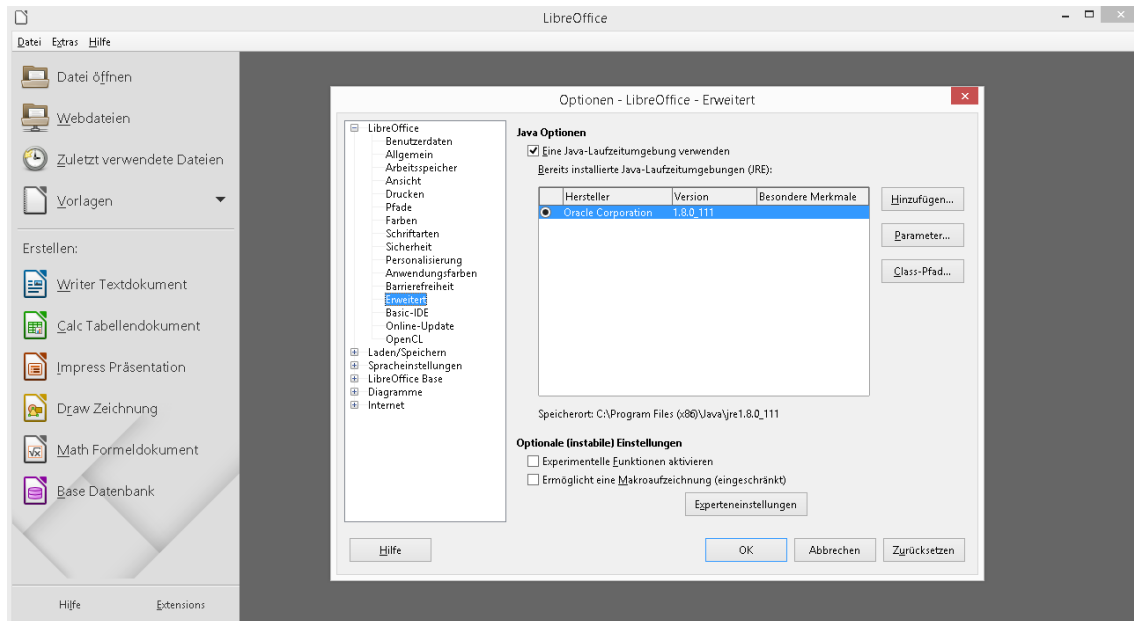


Fig. (similar) 11.9: Enable Java in Office

11.2.2 Install Addon

If Java is enabled, you can install the addon with the following steps [1, 2, 4, 3]:

1. Download the file for the LibreOffice / OpenOffice Addon at ecodms.de.
2. If this is a ZIP-file, unzip it first.
3. Start one of the Office Programs (here: LibreOffice general).
4. Click "Menu - Extras - Extension Manager".

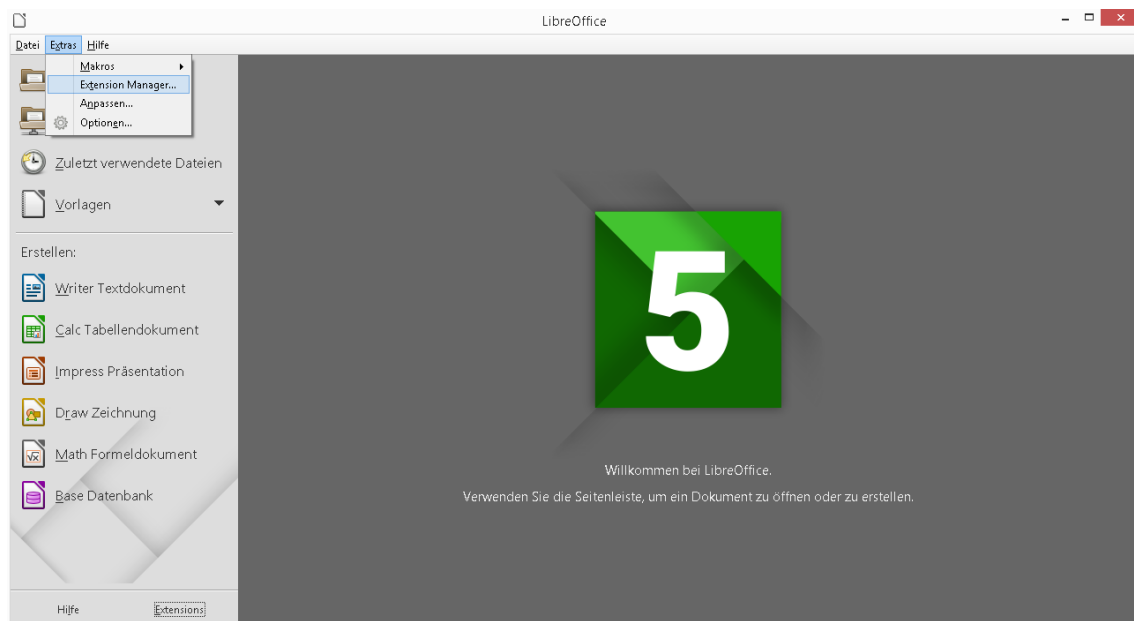


Fig. (similar) 11.10: LibreOffice: Tools -> Extension Manager

5. Click the "Add" button in the "Extension Manager".

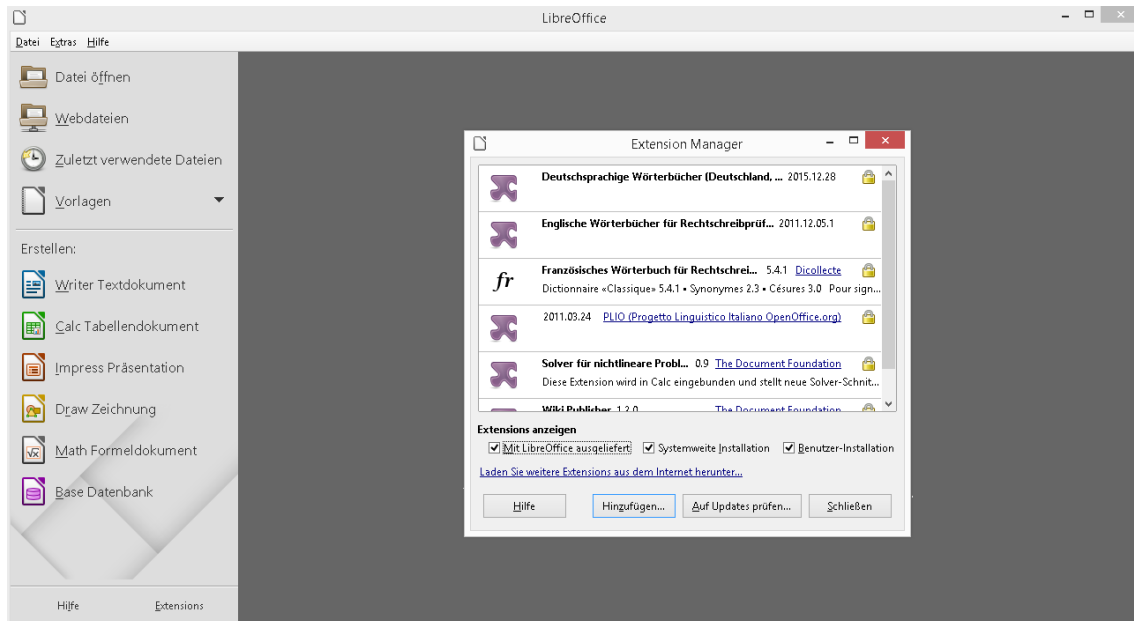


Fig. (similar) 11.11: LibreOffice: Extension Manager

6. Select the "OXT file" for the "ecoDMS Addon" and click "Open".

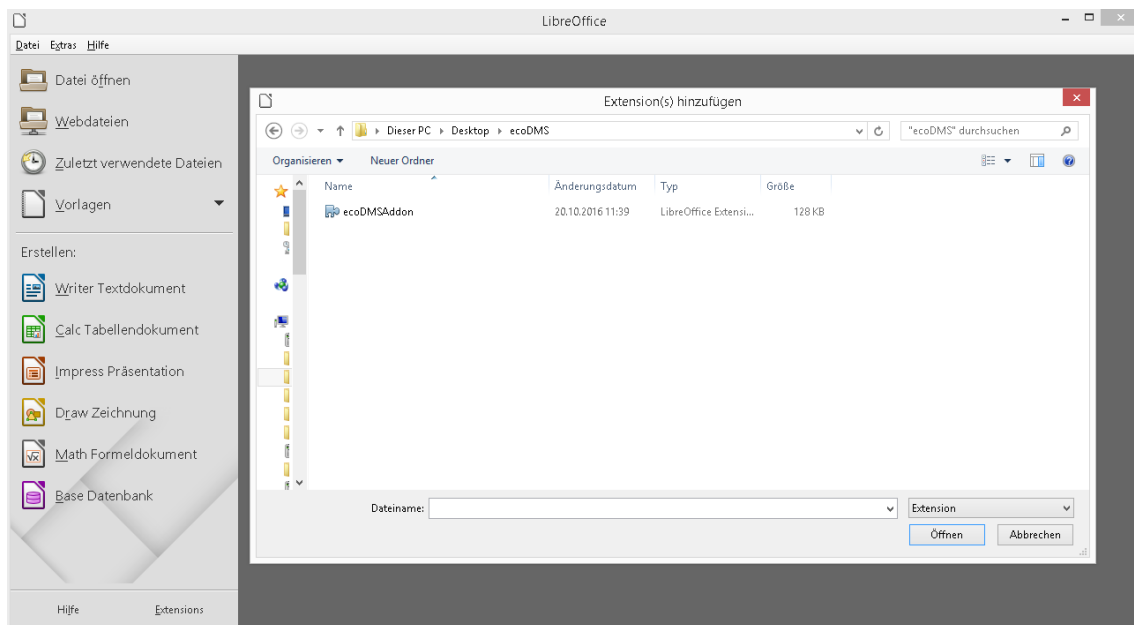


Fig. (similar) 11.12: LibreOffice: Extension Manager - Select File

7. Confirm any confirmation prompt according to your installation needs.

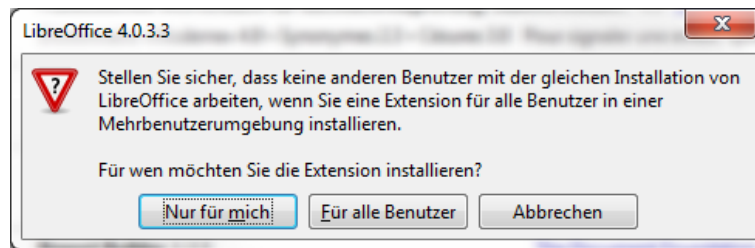


Fig. (similar) 11.13: Confirmation Prompt: User Environment

8. The installation is complete. You must restart the programme for the final activation of the addon.

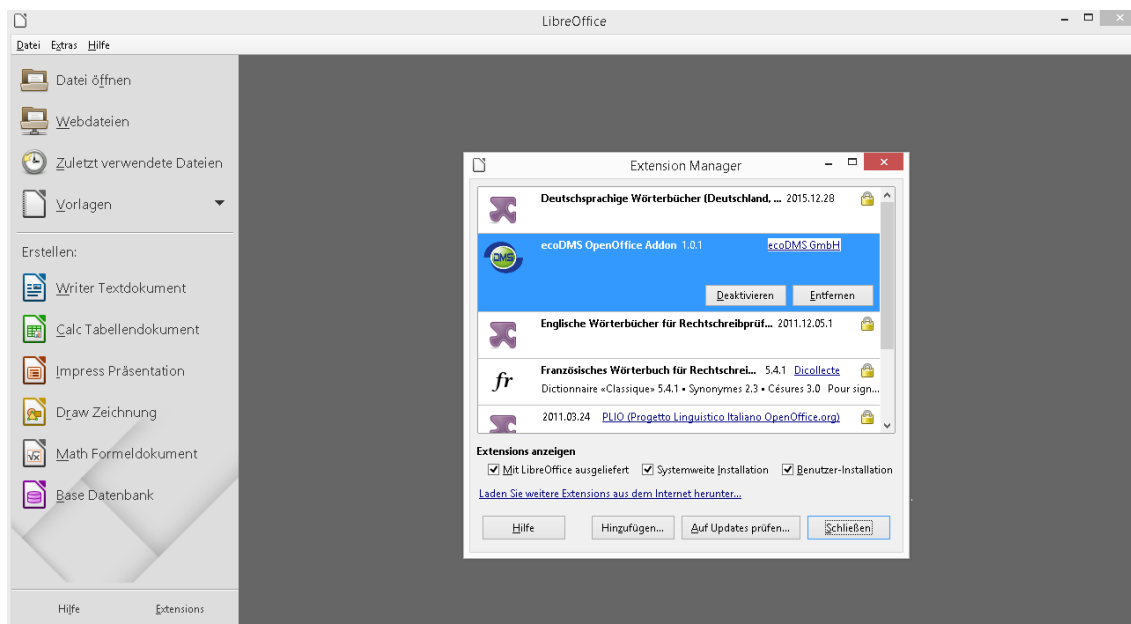


Fig. (similar) 11.14: LibreOffice: Installation Complete

9. On the toolbar of the programme, you can see the icon of the ecoDMS function.
- a) As an alternative you can use the new menu item "ecoDMS".

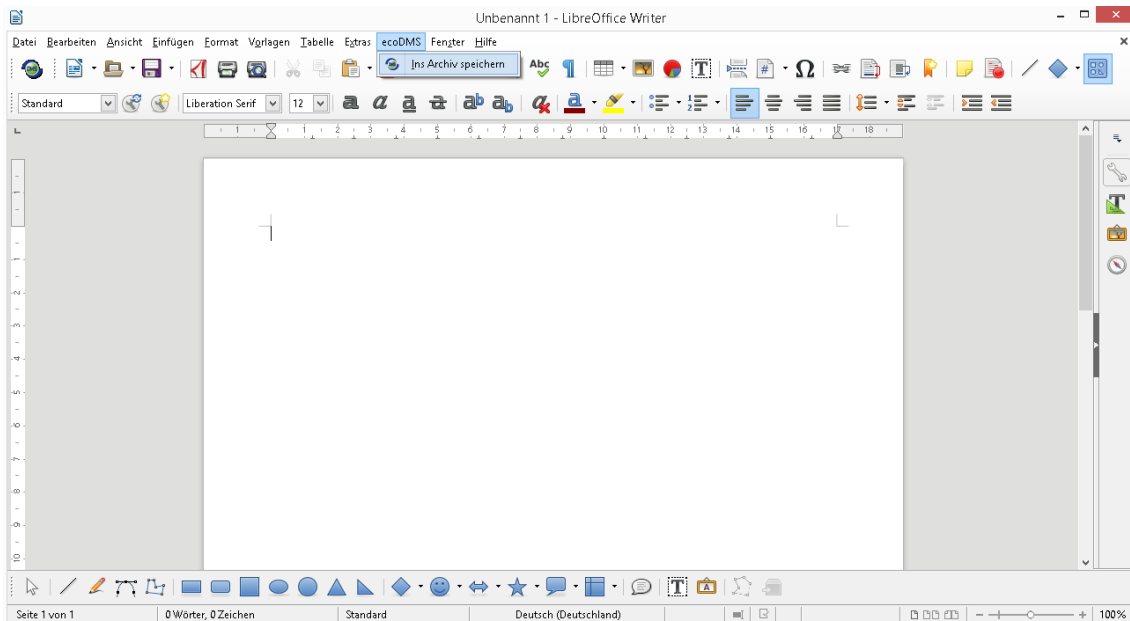


Fig. (similar) 11.15: LibreOffice: ecoDMS Addon (here: Writer)

11.3 Thunderbird Addon

You can import this ecoDMS addon directly in Thunderbird through the Addon Manager. Then you can directly archive the incoming and outgoing e-mails including attachments from Thunderbird via the addon. The following explains the installation process of the ecoDMS Thunderbird Addon under Windows, Linux distribution and MacOS [1, 2, 4, 3].

1. Download the file for the Thunderbird Addon at ecodms.de.
2. If this is a ZIP-file, unzip it first.
3. Start Thunderbird.
4. Click "Menu - Extras - Addons".

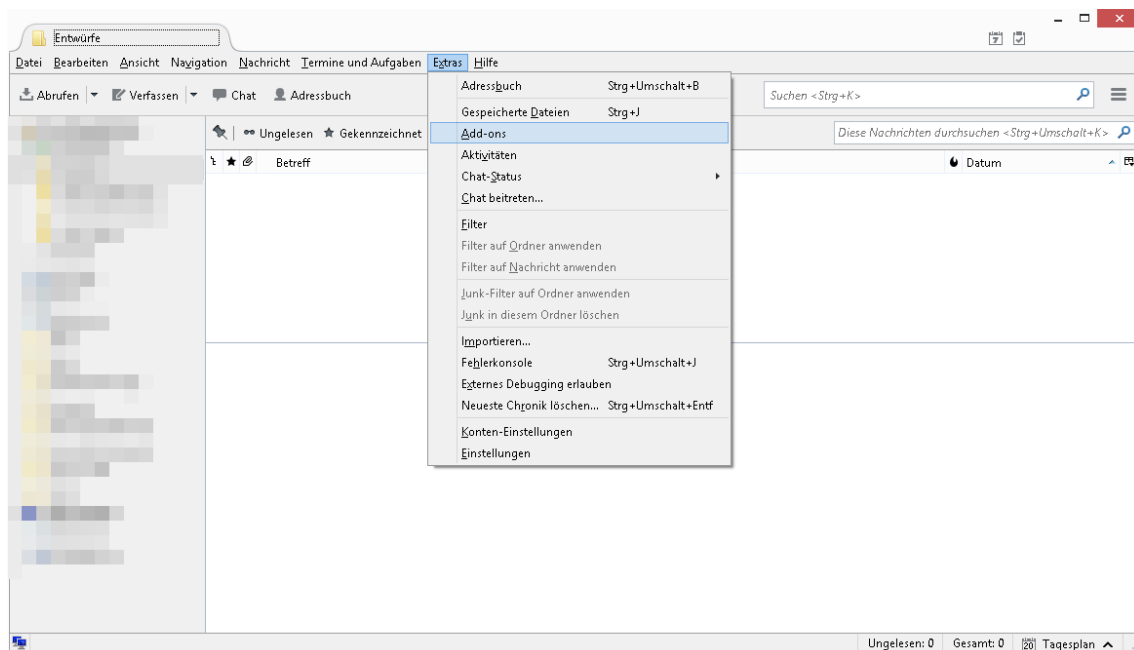


Fig. (similar) 11.16: Thunderbird: Extras -> Addons

5. Select the function "Install Add-on from File..." in the "Add-ons Manager".

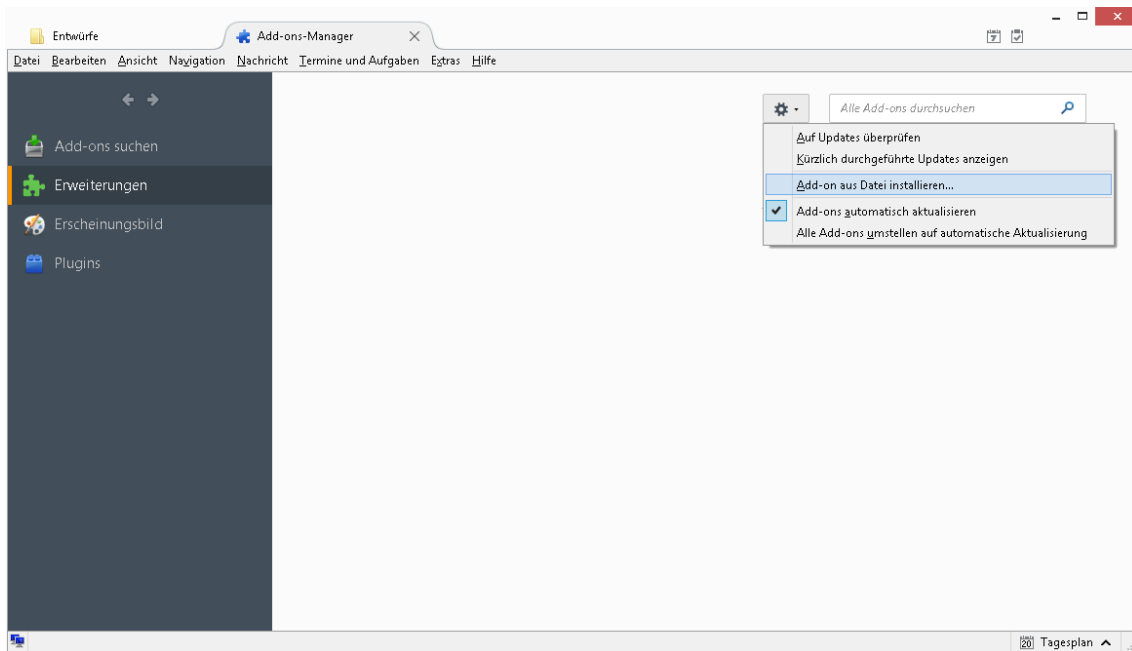


Fig. (similar) 11.17: Thunderbird: Install Addon from File

6. Select the "XPI file" for the "ecoDMSThunderbirdAddon" and click "Open".

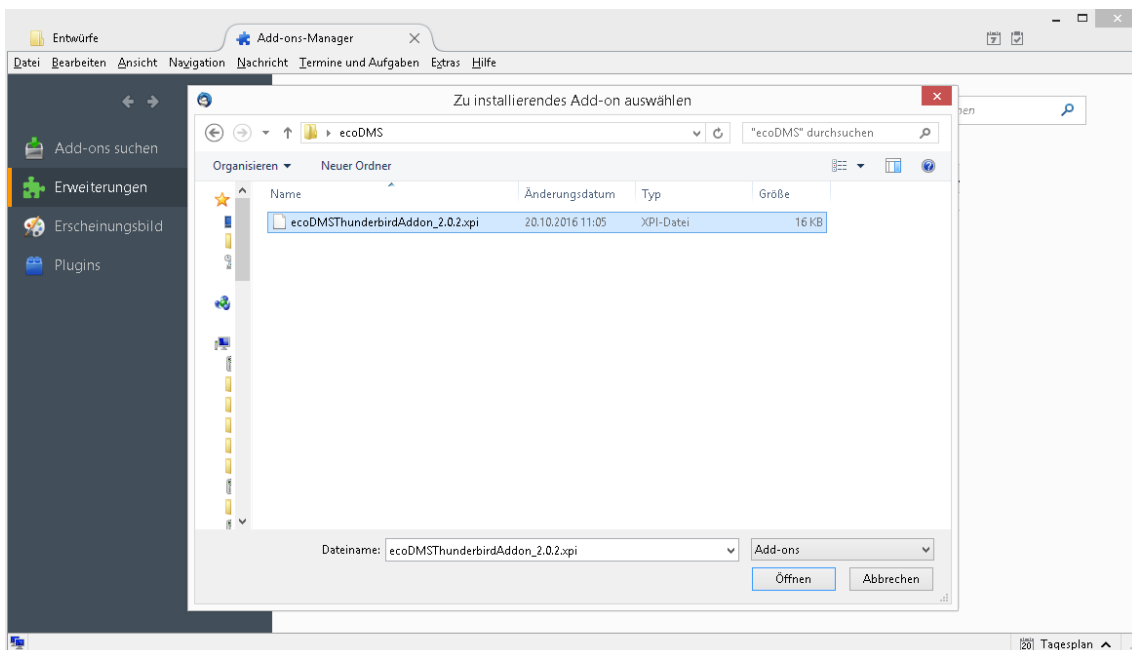


Fig. (similar) 11.18: Thunderbird: Select Addon

7. Confirm the confirmation prompt and click "Install Now" to start the installation.

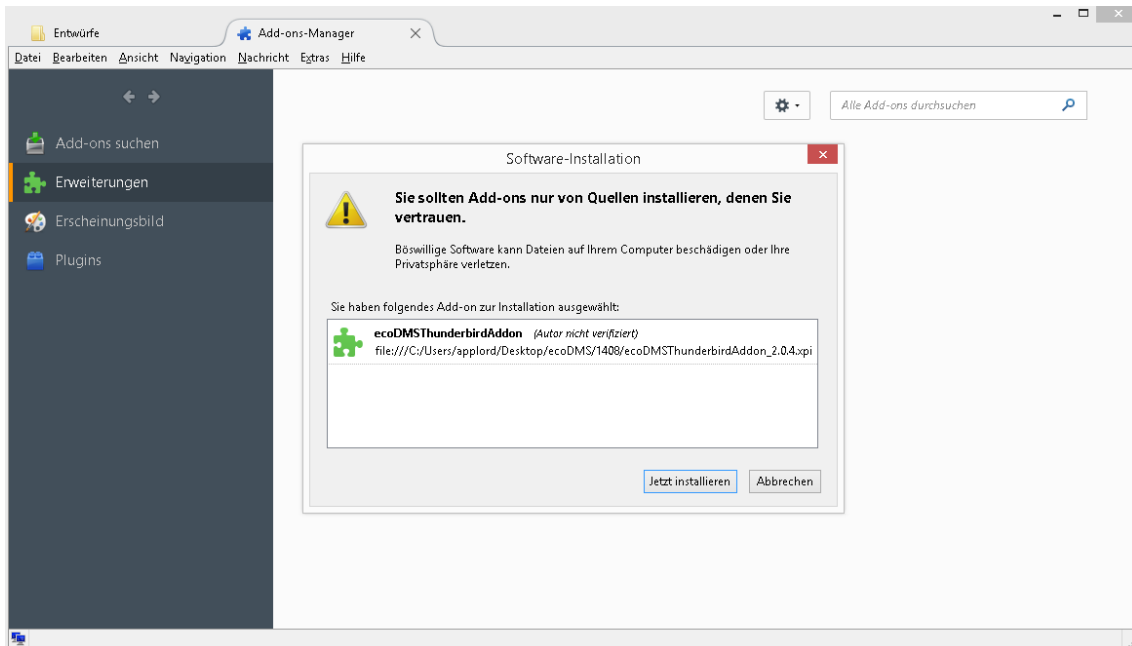


Fig. (similar) 11.19: Thunderbird: Confirmation Prompt

8. The installation is complete. Restart the programme to activate the addon. To do so, click "Restart Now".

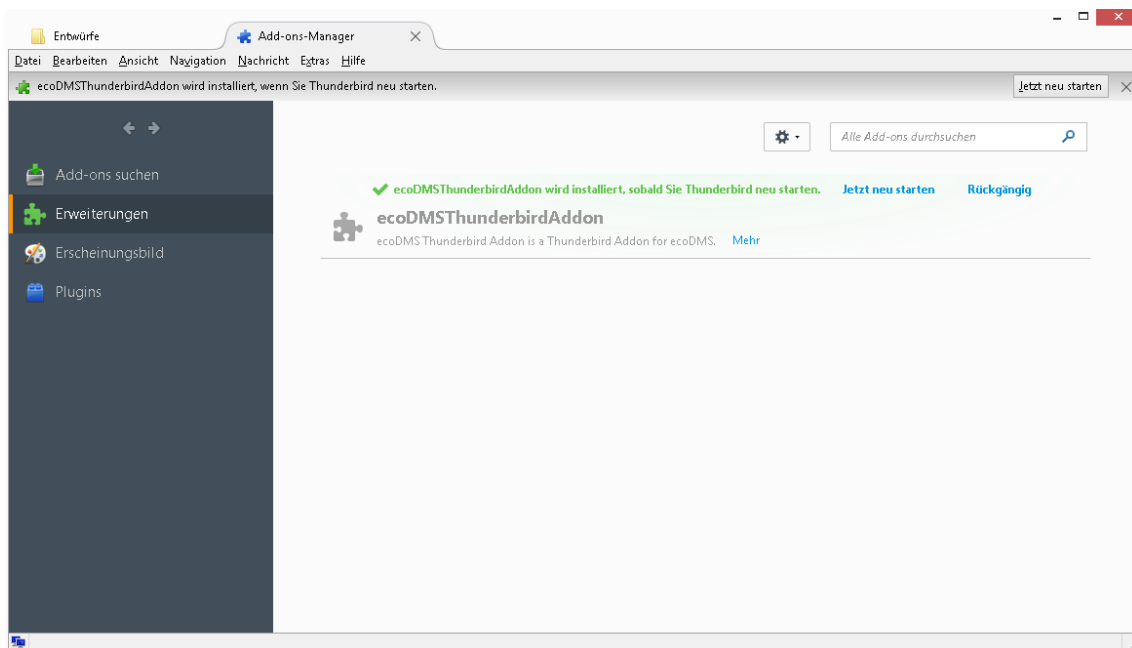


Fig. (similar) 11.20: Thunderbird: Restart

9. On the toolbar of the programme, you can see the icon of the ecoDMS function.

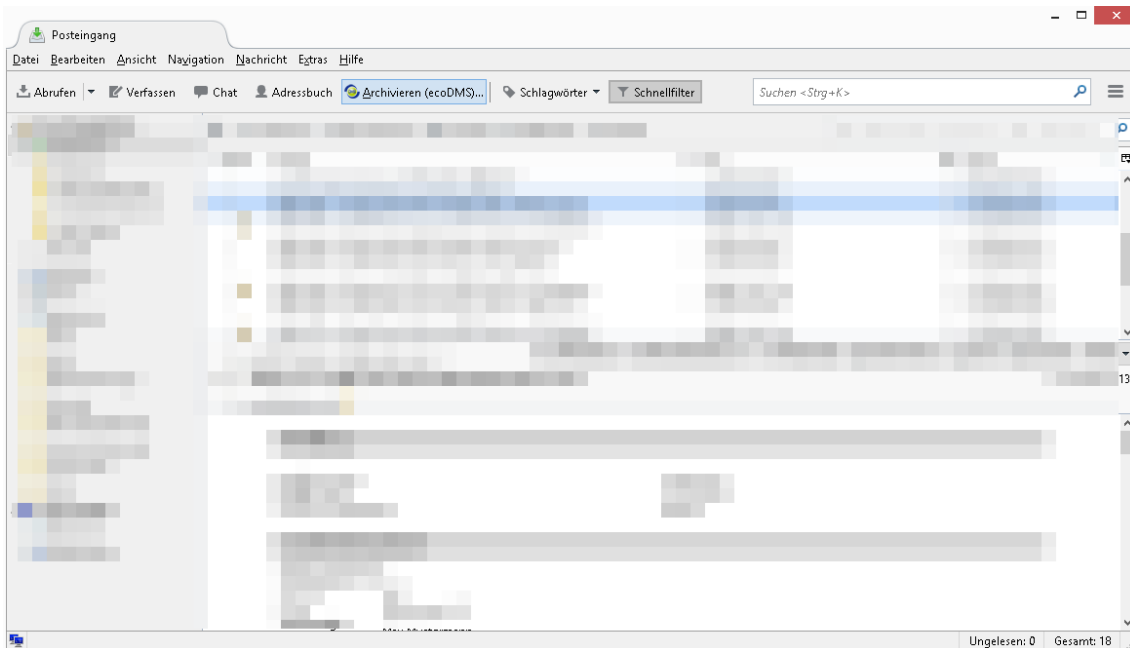


Fig. (similar) 11.21: Thunderbird: ecoDMS Installation Complete

Important Information for Chapter 11

- [1] *During the installation the firewall might inquire whether the application is allowed to access the network. Confirm this with Yes.*
- [2] *Ensure you make a backup before updating or upgrading. If you wish to upgrade from a previous version to a new major release, please follow the upgrade steps in the new installation manual. For a simple update of the same major release, just install the software over the old version. You must always update all components. Do not mix the components of an earlier ecoDMS version with this version. After an upgrade, a downgrade is only possible to an older ecoDMS version when there is a full backup of the previous version.*
- [3] *The prerequisite for the use of this Plugin is the installation of the current software components of ecoDMS Server, ecoDMS Client and ecoDMS PDF/A Printer.*
- [4] *You can install server and clients in different languages. The view of the classification attributes and messages depends on the language you have selected for the ecoDMS server component.*

12 Uninstall Plugins & Addons

The following section describes how to uninstall the available ecoDMS Plugins and Addons. Please note the system requirements and supported operating systems.

12.1 Microsoft Office Plugin

The following explains the uninstall process of the ecoDMS MS Office Plugin under Windows [1].

1. Exit all Office applications.
2. Select Programs -> "ecoDMS Office Plugin" in the control panel.
3. Use the "Uninstall" function.
4. The uninstallation is prepared and then executed. This operation may take a while.

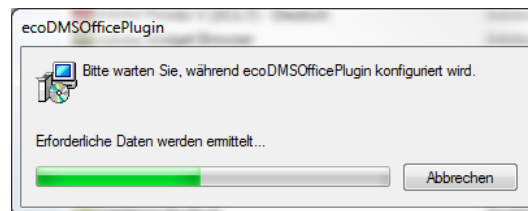


Fig. (similar) 12.1: MS Office Plugin - Uninstallation: Preparation & Execution

5. The uninstallation is complete and the "ecoDMS MS Office Plugin" has been removed from your system.

12.2 Libre- & OpenOffice Addon

The following explains the uninstall process of the ecoDMS LibreOffice and OpenOffice Addon under Windows [1].

1. Start one of the Office programmes (here: LibreOffice general).
2. Click "Menu - Extras - Extension Manager".

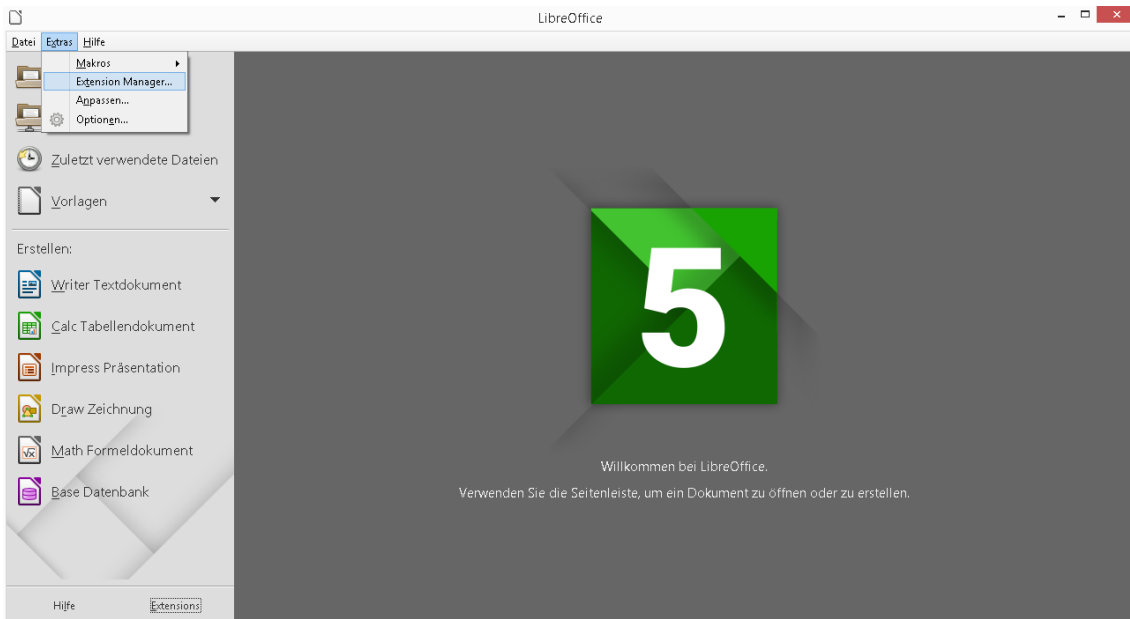


Fig. (similar) 12.2: LibreOffice: Extras -> Extension Manager

3. Select the "ecoDMS OpenOffice Addon" in the "Extension Manager" and click the "Remove" button.

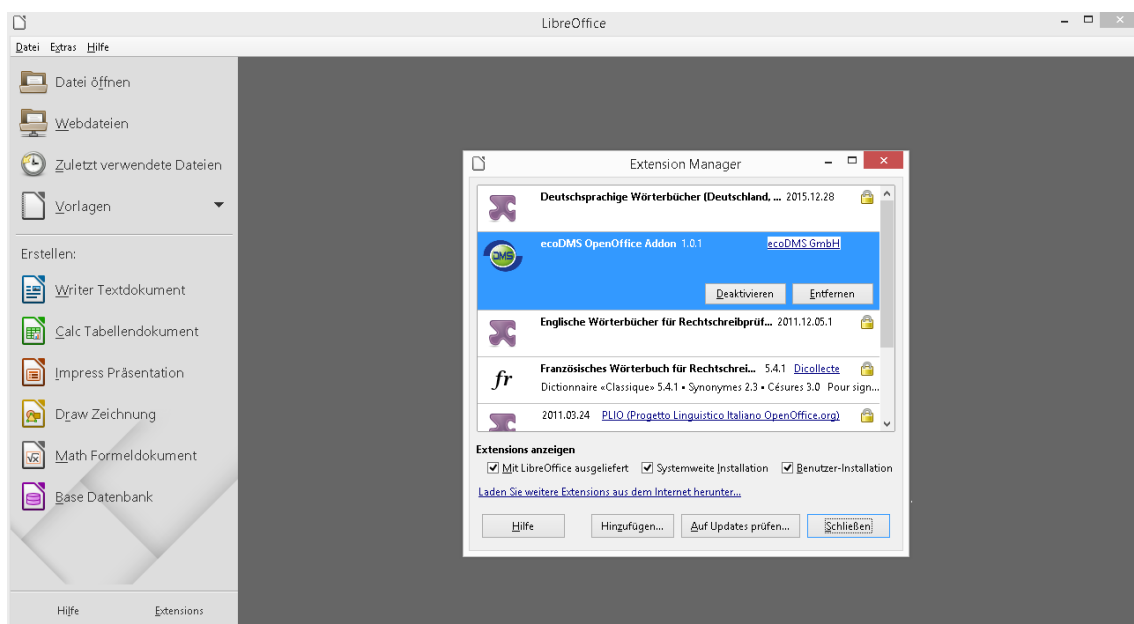


Fig. (similar) 12.3: LibreOffice: Extension Manager

4. Confirm the confirmation prompt for the uninstallation with "OK".

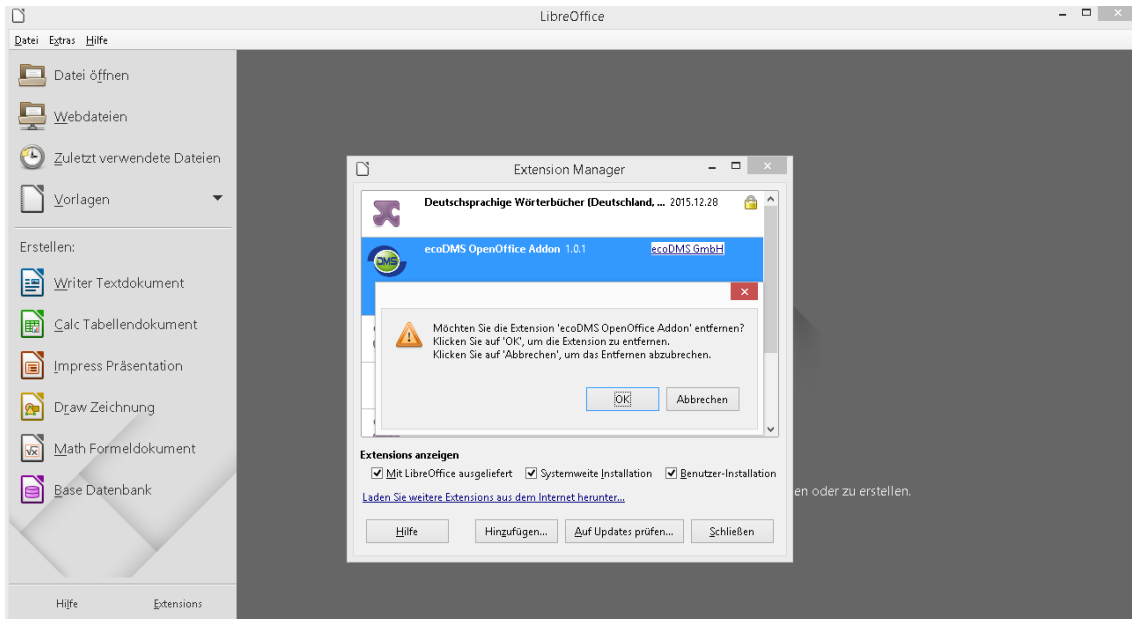


Fig. (similar) 12.4: Confirmation Prompt for Uninstallation

5. You have now uninstalled the plugin. Restart the programme to remove the plugin completely.

12.3 Thunderbird Addon

The following explains the uninstall process of the ecoDMS Thunderbird Addon under Windows [1].

1. Start Thunderbird.
2. Click "Menu - Extras - Addons".

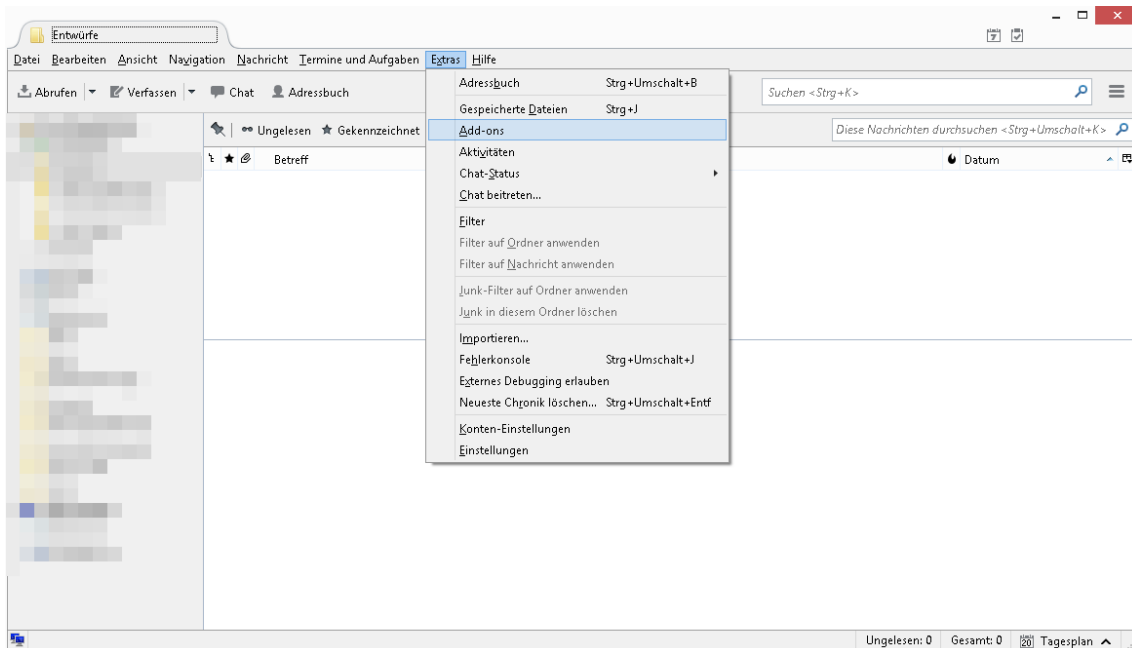


Fig. (similar) 12.5: Thunderbird: Extras -> Addons

3. Select the "ecoDMSThunderbirdAddon" extension in the "Add-Ons Manager" and click the "Remove" button.

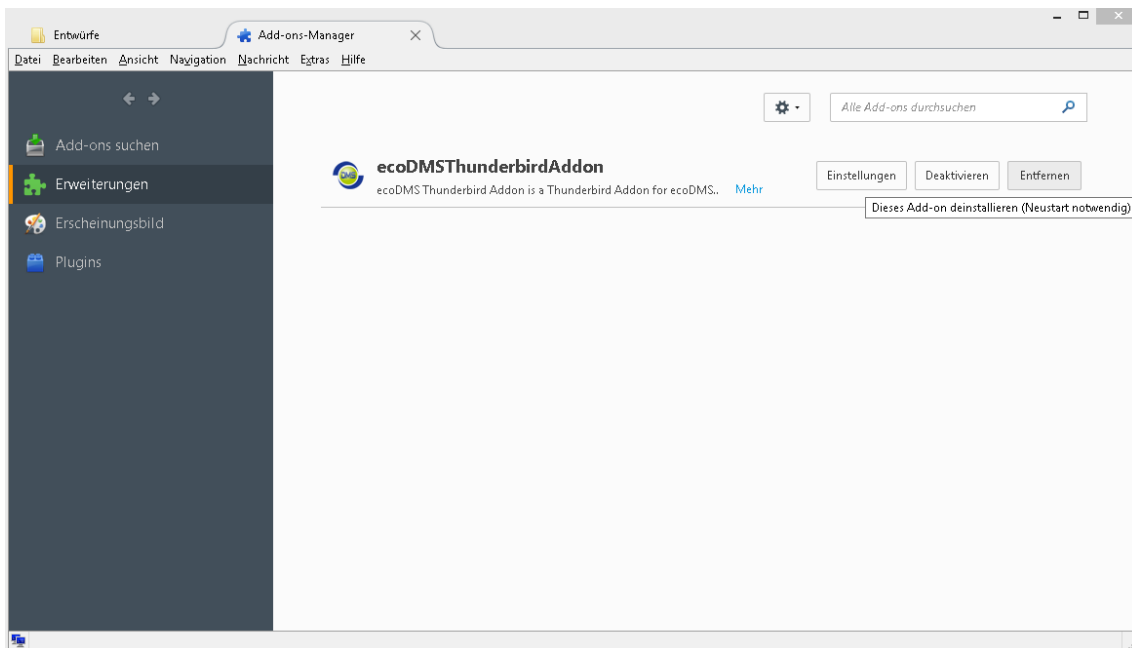


Fig. (similar) 12.6: Thunderbird: Uninstall Addon

- Restart Thunderbird to finalise the uninstall process and to remove the function completely. To do so, click "Restart Now".

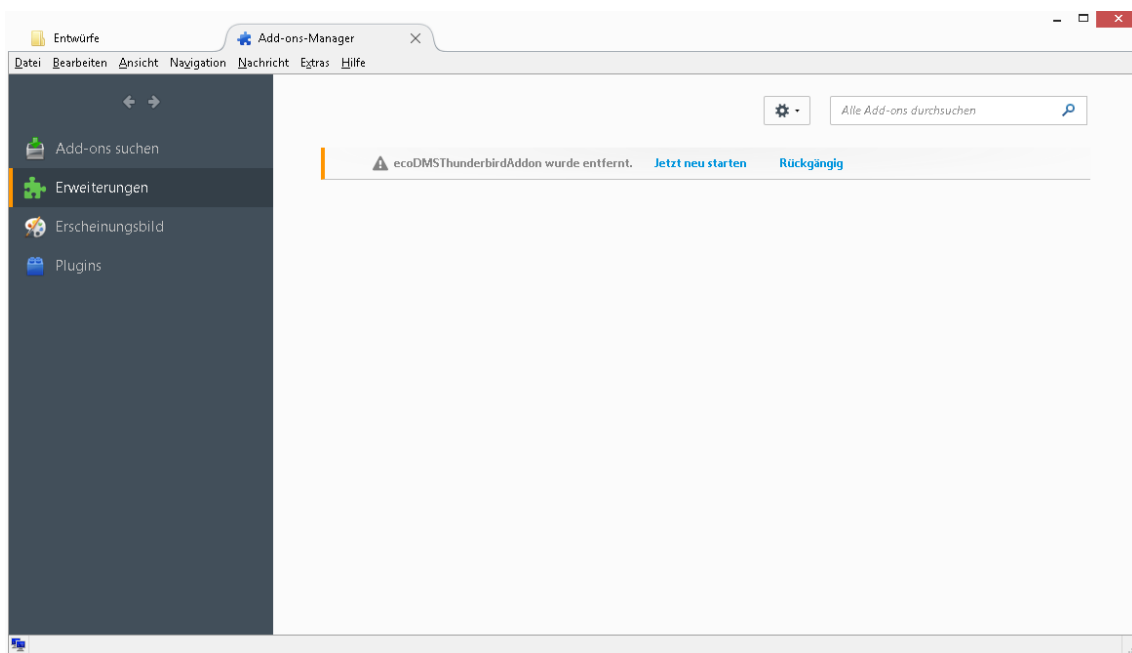


Fig. (similar) 12.7: Thunderbird: Restart

Important Information for Chapter 12

- [1] Ensure you make a backup before updating or upgrading. If you wish to upgrade from a previous version to a new major release, please follow the upgrade steps in the new installation manual. For a simple update of the same major release, just install the software over the old version. You must always update all components. Do not mix the components

of an earlier ecoDMS version with this version. After an upgrade, a downgrade is only possible to an older ecoDMS version when there is a full backup of the previous version.

13 Backup & Restore

If you want to backup your data or if you want to restore an existing backup following a new installation or an update of your application, you can use the different backup & restore options in ecoDMS. The ecoDMS manual lists and describes the options for the supported operating systems, including NAS.