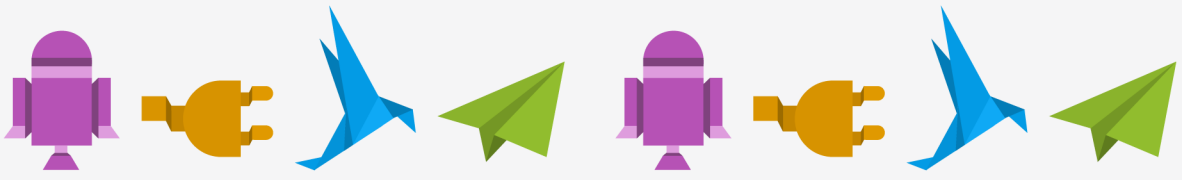
INSTALLATION

ecoDMS Version 16.09 (eleanor)



Imprint

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1 System Requirements

Please refer to the official system requirements for the respective ecoDMS component before each installation. If your system does not meet these requirements, we cannot guarantee the smooth and stable operation of our software. For the system requirements of ecoDMS Version 16.09 (eleanor), please refer to the official ecoDMS website at the following link:

```
https://www.ecodms.de/index.php/en/ecodms-archive/system-requirements/ecodms-version-16-09-
    eleanor
```

2 Windows

This chapter describes the necessary steps for installing and uninstalling ecoDMS components under Windows. In addition, it features a description of how to perform ecoDMS upgrades and important information about the individual processes.

2.1 Upgrade

The following section describes the upgrade process to the major release version 16.09 (eleanor) under Windows.

2.1.1 Basics

1. If you are upgrading from the **previous ecoDMS version 14.08 (krusty)** to ecoDMS version 16.09 (eleanor), you must follow the upgrade steps in **this installation manual**.
   a) When upgrading from version 14.08 (krusty) to version 16.09 (eleanor), make sure that the last update 12 of ecoDMS 14.08 (krusty) is installed on your system.
   b) If this is not the case, you must update the previous version 14.08 (krusty) with update 12 before upgrading to version 16.09 (eleanor).
2. If you are upgrading from the **previous ecoDMS version 12.05 (brandine)** to ecoDMS version 16.09 (eleanor), you must follow the upgrade steps in the **installation manual of ecoDMS version 14.08 (krusty)**.
   a) When upgrading from version 12.05 (brandine) to version 16.09 (eleanor), 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).
   c) To upgrade from version 12.05 (brandine) to version 16.09 (eleanor), you do not need to upgrade to version 14.08 (krusty) first. In this case you only need to follow the upgrade steps described in the installation manual of ecoDMS version 14.08 (krusty).
   d) After following the upgrade steps in the installation manual of version 14.08 (krusty), you can install the new version 16.09 (eleanor) according to this installation manual.
3. Ensure you create a backup before updating or upgrading.
4. **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.

2.1.2 Process

Execute the upgrade by working through the following steps in the order specified. Please note the upgrade basics 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.

```
ecoDMS Server 14.08
```

```
ecodmspsql-9.3
```

```
ecoDMSMQ
```

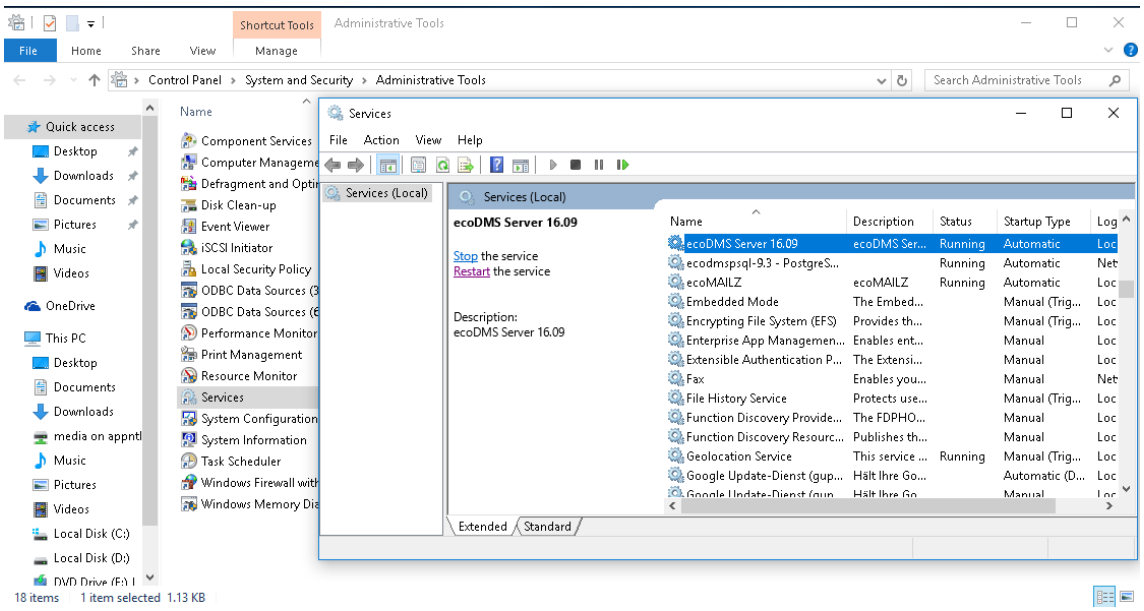

Fig. (similar) 2.1: ecoDMS Server - Stop Service

a) After you have stopped the services properly, copy the data folder.

4. Now install the ecoDMS server and the other components of the new ecoDMS version over the existing components of ecoDMS version 14.08 (krusty). To do this, complete the installation steps in this installation manual.

a) Make sure you create a full backup of the existing database before upgrading.

b) If you install the components of the new ecoDMS version 16.09 (krusty) over an existing ecoDMS version 14.08 (krusty), you must confirm that you have created a data backup.

c) Because of comprehensive innovations, changes and additional functions, you cannot use licenses from previous versions to activate a new major release. Of course, your ecoDMS license will remain fully valid and can be used without restrictions with the respective ecoDMS version. You can decide whether you want to purchase an upgrade license for version 16.09 or whether you want to continue using the current version. An upgrade is not mandatory.

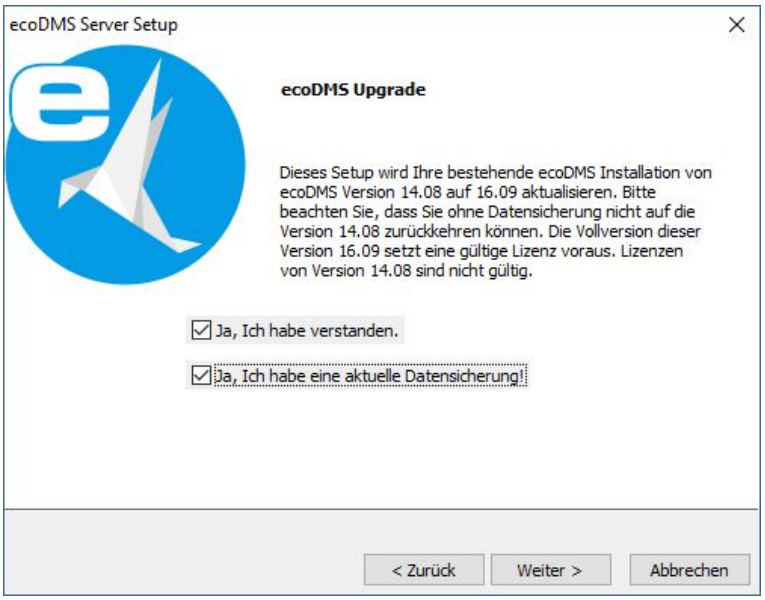

Fig. (similar) 2.2: ecoDMS Upgrade: Backup Confirmation

5. Restart your computer.
6. The upgrade is complete and you can now work with the new ecoDMS version.
   a) Please note that existing data will be migrated and full-text indexed in the background.
   b) The duration of the operation depends on the data volume.
   c) Until the migration is complete, the server may show high capacity utilisation.
   d) Leave the computer switched on until the migration is complete.
   e) You can monitor the progress under "Settings - File Indexing" in the Settings dialogue box.

2.1.3 ecoICE Uninstall

ecoICE version 14.08 (krusty) will remain on your computer after the upgrade.

- You can uninstall this software manually.
- Version 16.09 (eleanor) no longer requires this component.
- In version 16.09 the ecoICE programme is replaced by the Inbox in the ecoDMS Client.

2.1.4 License Information

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

2.2 Installation

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

2.2.1 Basics

Please read the following information before installing:

- 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.
- **When using synchronisation services / Cloud services, always ensure that the ecoDMS folders are excluded. Otherwise this may lead to errors in the data folders / containers.**

2.2.2 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 & container storage system, the ecoDMS Client including Inbox & Connection Manager 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 login credentials for the default profile [3, 5, 1, 2, 6, 7].

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

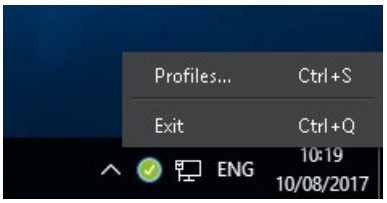

Fig. (similar) 2.3: Exit Connection Manager

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. Depending on the system environment, Windows displays a confirmation prompt for the "User Account Control" during installation. Confirm with "Yes" when asked whether you want to allow the following programme to make changes to this computer.

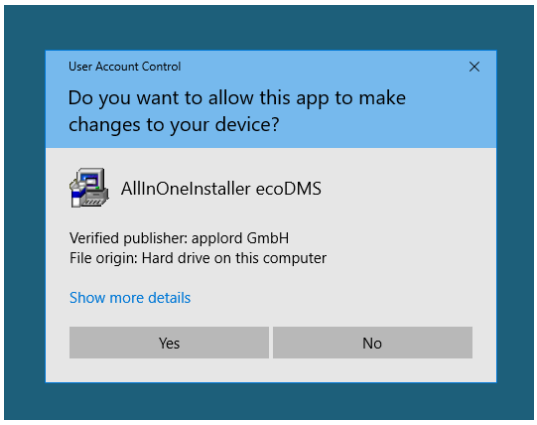

Fig. (similar) 2.4: AllinOneInstaller: Windows Confirmation Prompt

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.

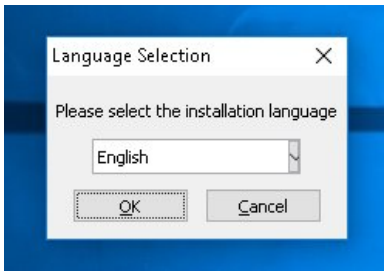

Fig. (similar) 2.5: AllinOneInstaller: Language Selection

7. The ecoDMS setup wizard opens. Click "Next" in the "Welcome Screen".

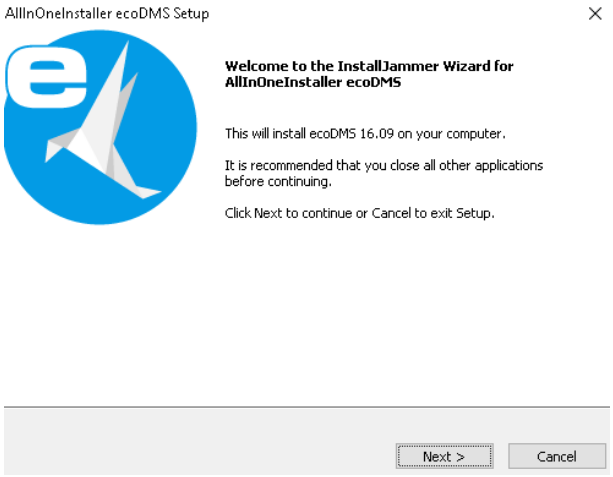

Fig. (similar) 2.6: Install ecoDMS - Welcome Screen - AllinOne Installation

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

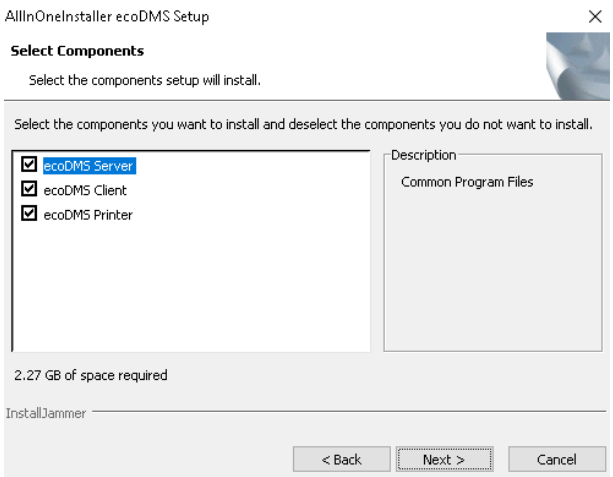

Fig. (similar) 2.7: AllinOneInstaller - Select Components

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

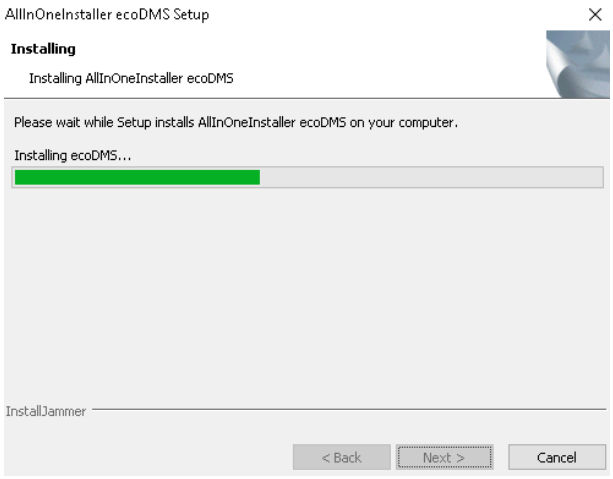

Fig. (similar) 2.8: AllinOneInstaller - Prepare Installation

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

2.2.3 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, 5, 1, 2, 6, 7].

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

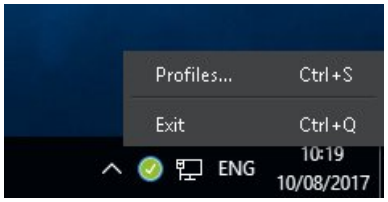

Fig. (similar) 2.9: Exit Connection Manager

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. Depending on the system environment, Windows displays a confirmation prompt for the "User Account Control" during installation. Confirm with "Yes" when asked whether you want to allow the following programme to make changes to this computer.

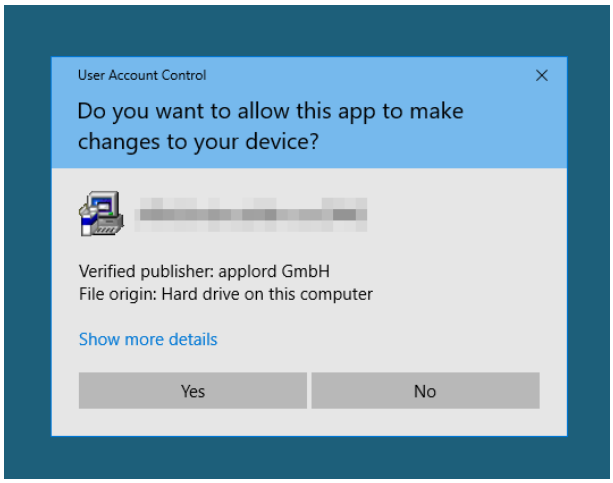

Fig. (similar) 2.10: AllinOneInstaller: Windows Confirmation Prompt - ecoDMS Server

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.

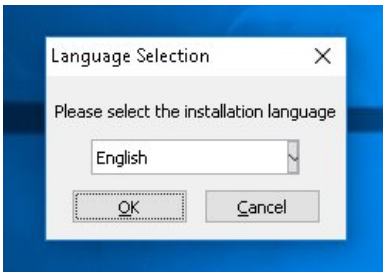

Fig. (similar) 2.11: ecoDMS Server: Language Selection

7. Confirm the dialogue box with "Yes".

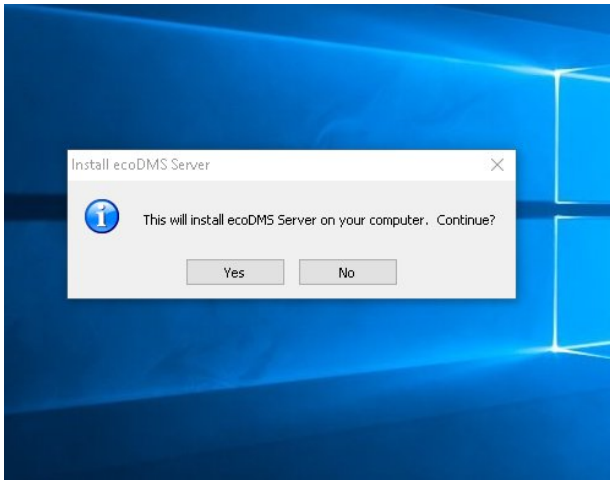

Fig. (similar) 2.12: ecoDMS Server: Note

8. The ecoDMS Server setup wizard opens. Click "Next" in the "Welcome Screen".

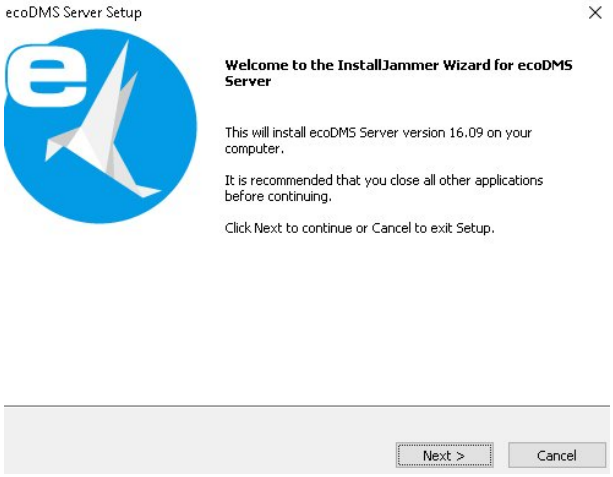

Fig. (similar) 2.13: ecoDMS Server Start Screen

9. The following page only displays if you upgrade from version 14.08 (krusty) to ecoDMS version 16.09 (eleanor):
   a) This setup will update your existing ecoDMS installation from ecoDMS version 14.08 (krusty) to 16.09. Please note that without a data backup you cannot return to version 14.08. The full version of this version 16.09 requires a valid license. licenses of version 14.08 are not valid.
   b) Confirm the two messages after reading them carefully and after you created a backup.
      i. Yes, I have understood.
      ii. Yes, I have a current data backup.

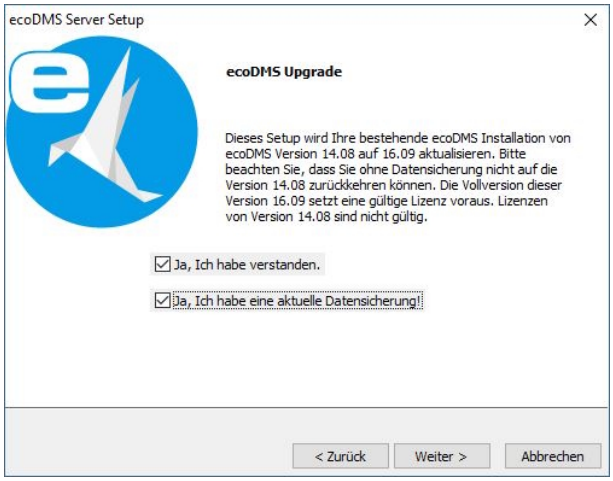

Fig. (similar) 2.14: ecoDMS Server: Upgrade Message

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

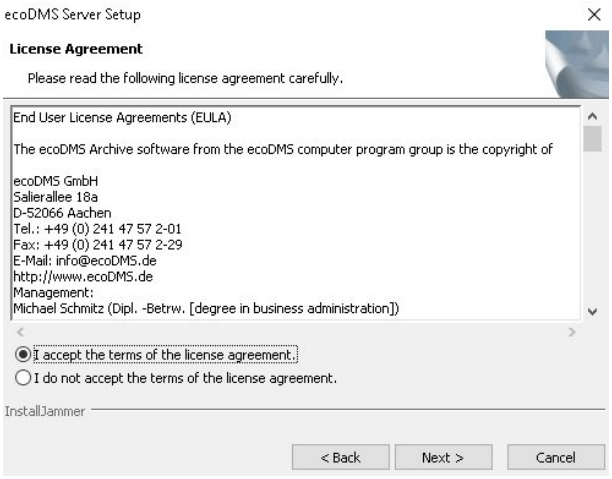

Fig. (similar) 2.15: ecoDMS Server: License Agreement

11. Select the server components you want to install.
    a) We recommend you install "ecoDMS Server 16.09" and "postgreSQL".
    b) If the installation is an update, only the "ecoDMS Server 16.09" is displayed here for selection.

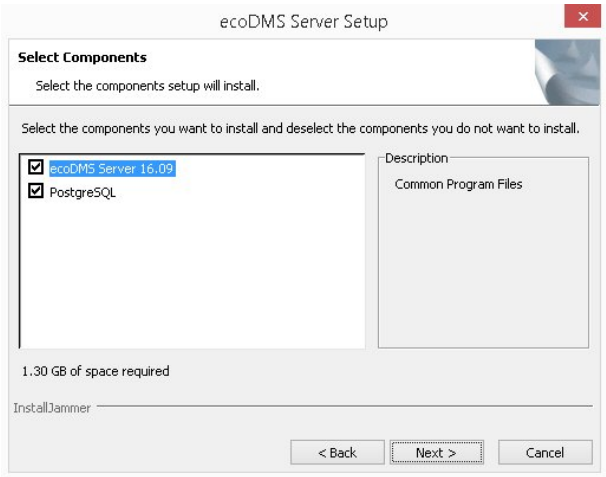

Fig. (similar) 2.16: ecoDMS Server: Select Components

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

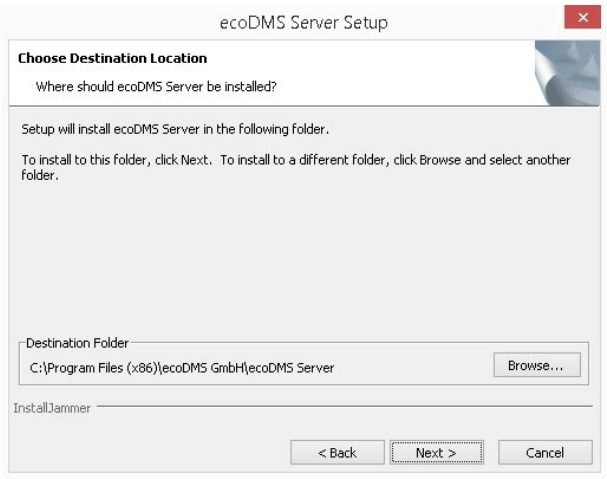

Fig. (similar) 2.17: ecoDMS Server: Installation Destination

13. 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 [6].
    a) The port specified during the ecoDMS installation is automatically specified in the firewall.
    b) 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.
    c) If postgreSQL was installed manually, ensure that it was the postgreSQL version supported by ecoDMS (postgreSQL 9.3.X - 32bit).
        i. During the installation, ecoDMS requests the login credentials for the existing postgreSQL database.
    d) If postgreSQL was installed manually, make sure that the postgreSQL service is started before the ecoDMS Server. Otherwise the ecoDMS Server cannot be executed.

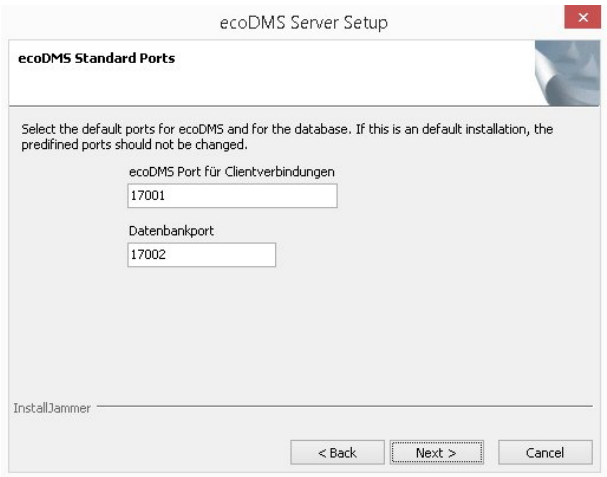

Fig. (similar) 2.18: ecoDMS Server: Port Selection

14. 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.

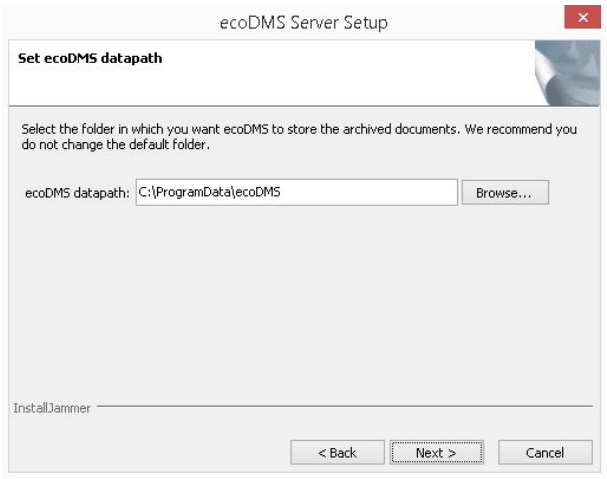

Fig. (similar) 2.19: ecoDMS Server: Data Folder

15. 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.

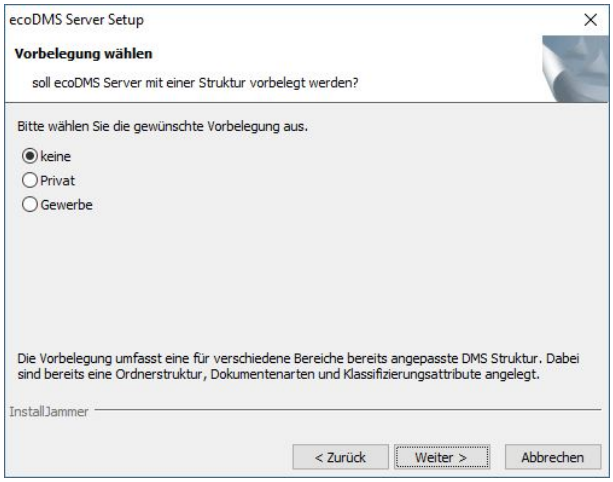

Fig. (similar) 2.20: ecoDMS Server: Default Settings

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

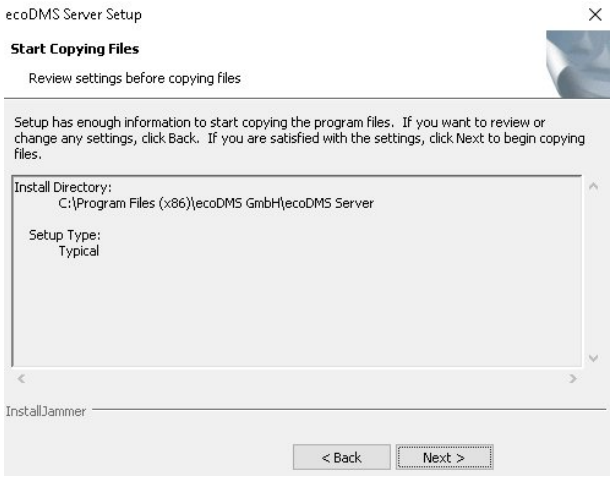

Fig. (similar) 2.21: ecoDMS Server: Copy Files

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

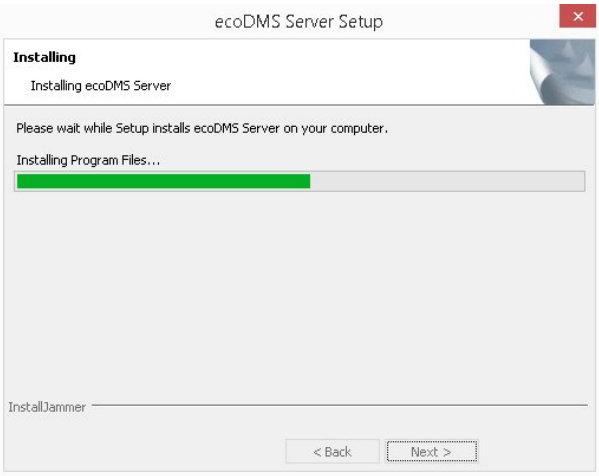

Fig. (similar) 2.22: ecoDMS Server: Installing ecoDMS Server

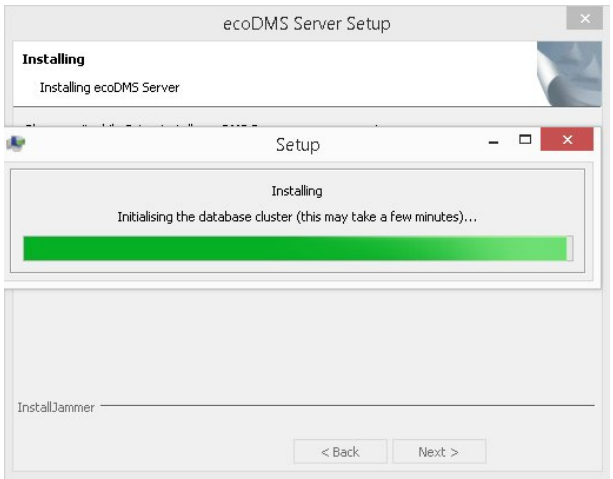

Fig. (similar) 2.23: ecoDMS Server: Installing postgreSQL

18. The installation of the ecoDMS Server is complete. Click "Finish".

a) We recommend you restart the computer after the installation.

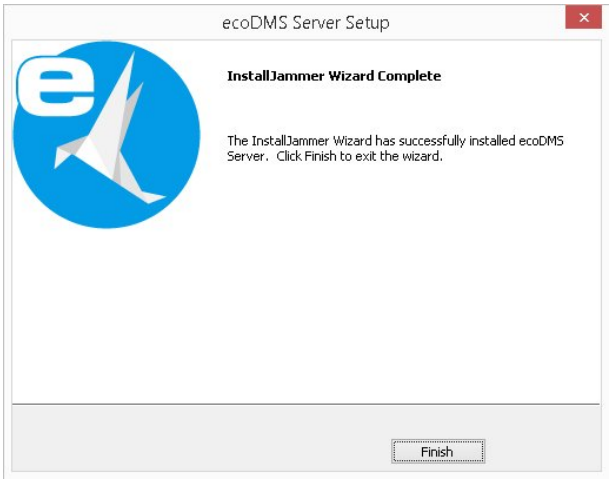

Fig. (similar) 2.24: ecoDMS Server: Installation Complete

2.2.4 ecoDMS Client

Use this installation file to install the ecoDMS Archive user interface. Moreover, the Connection Manager and the Inbox are fixed components of this software package. The following explains the installation process of the ecoDMS Client under Windows [1, 2, 7].

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

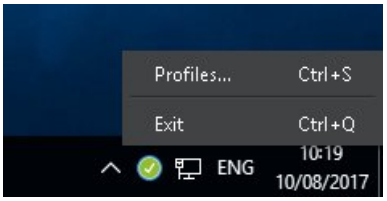

Fig. (similar) 2.25: Exit Connection Manager

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. Depending on the system environment, Windows displays a confirmation prompt for the "User Account Control" during installation. Confirm with "Yes" when asked whether you want to allow the following programme to make changes to this computer.

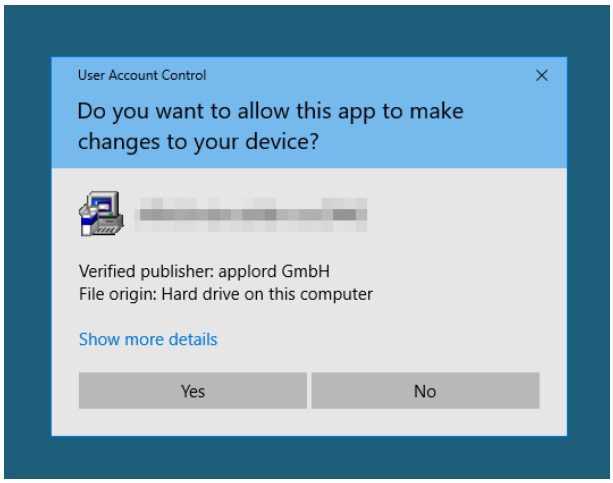

Fig. (similar) 2.26: AllinOneInstaller: Windows Confirmation Prompt - ecoDMS Client

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.

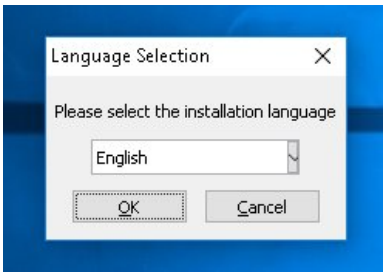

Fig. (similar) 2.27: ecoDMS: Language Selection

7. Confirm the dialogue box with "Yes".

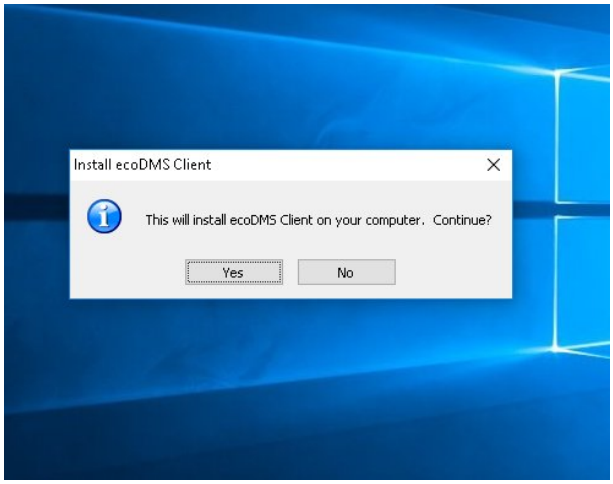

Fig. (similar) 2.28: ecoDMS: Note

8. The ecoDMS Client setup wizard opens. Click "Next" in the "Welcome Screen".

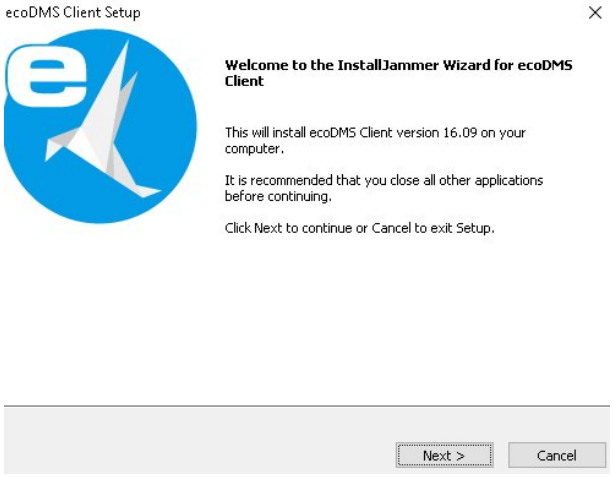

Fig. (similar) 2.29: ecoDMS Start Screen

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

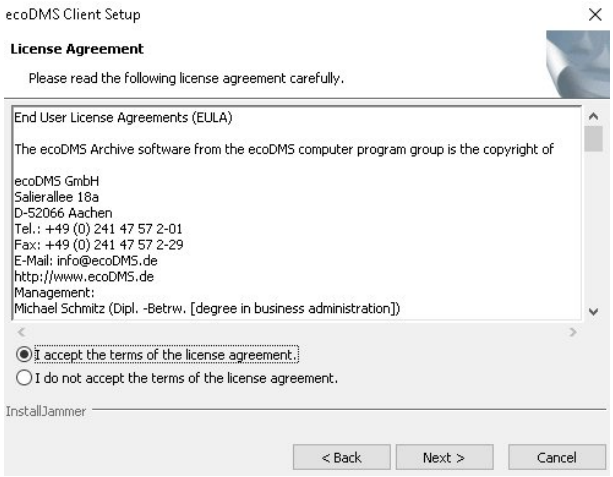

Fig. (similar) 2.30: ecoDMS: license Agreement

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

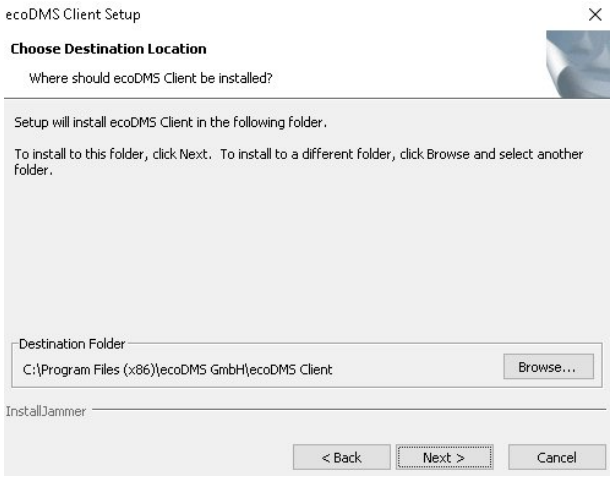

Fig. (similar) 2.31: ecoDMS: Installation Destination

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

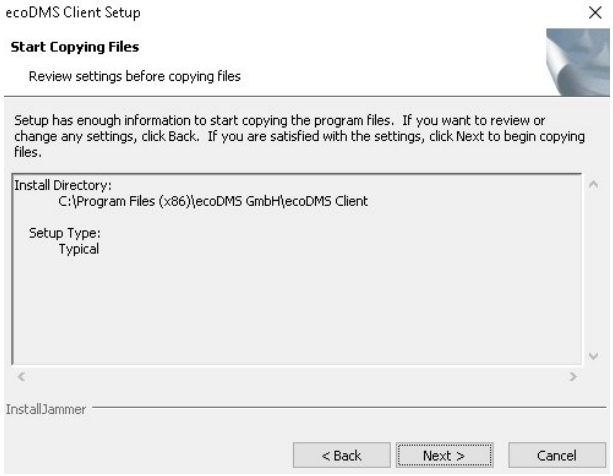

Fig. (similar) 2.32: ecoDMS: Copy Files

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

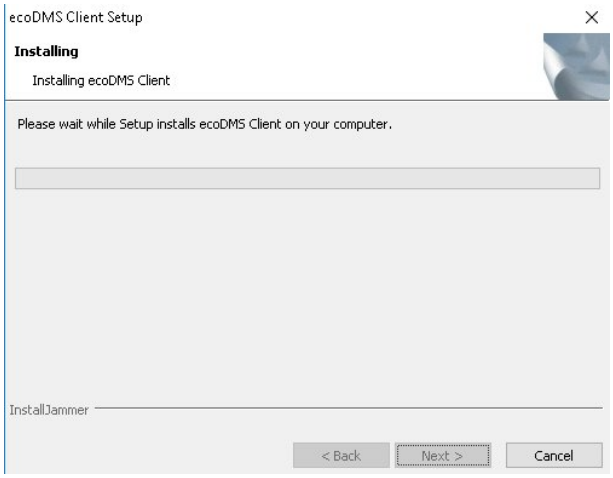

Fig. (similar) 2.33: ecoDMS: Installation

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

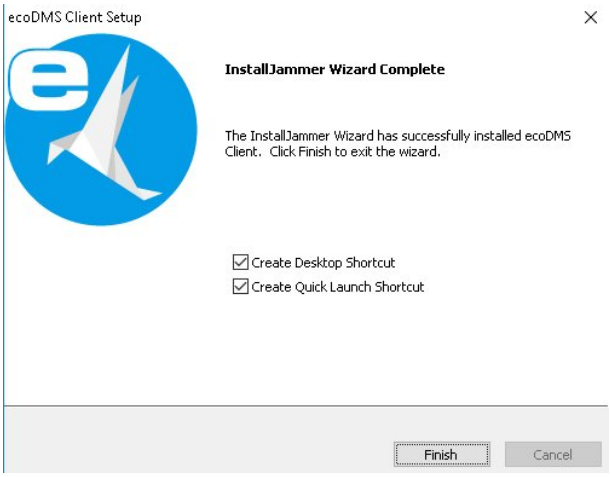

Fig. (similar) 2.34: ecoDMS: Installation Complete

2.2.4.1 Note: ecoDMS Client without Content (White Main Window)

- Depending on the hardware, hardware acceleration of the computer (not the graphics card) is required.
- Should the main window of the ecoDMS Client remain white (without content) during startup, please start the ecoDMS Client with ecodmsclient_opengl.bat in the installation folder of the ecoDMS Client.
- Default:

```
C:\Program Files (x86)\ecoDMS GmbH\ecoDMS Client
```

- Execute the following file:

```
ecodmsclient_opengl.bat
```

2.2.5 ecoDMS Printer

Use this file to install the ecoDMS virtual PDF/A Printer (Printer driver). The following explains the installation process of the ecoDMS Printer under Windows [1, 2, 7].

1. Download the file for the ecoDMS Printer at ecodms.de.
2. If this is a ZIP-file, unzip it first.
3. Execute the installation file "....exe".
4. Depending on the system environment, Windows displays a confirmation prompt for the "User Account Control" during installation. Confirm with "Yes" when asked whether you want to allow the following programme to make changes to this computer.

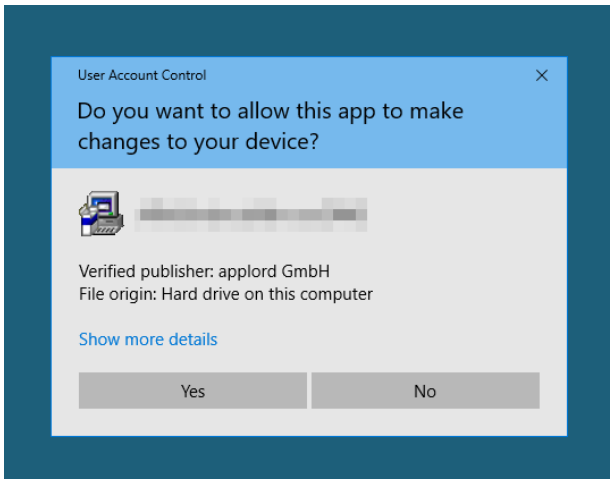

Fig. (similar) 2.35: AllinOneInstaller: Windows Confirmation Prompt - ecoDMS Printer

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.

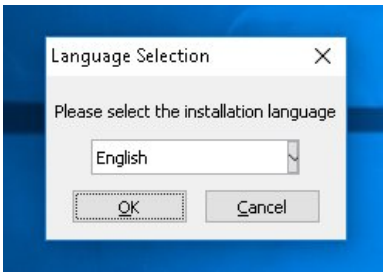

Fig. (similar) 2.36: PDF/A Printer: Language Selection

6. Confirm the dialogue box with "Yes".

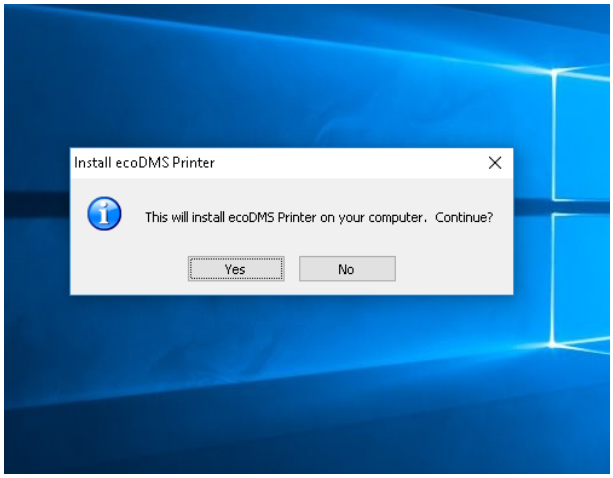

Fig. (similar) 2.37: PDF/A Printer: Note

7. The ecoDMS Printer setup wizard opens. Click "Next" in the "Welcome Screen".

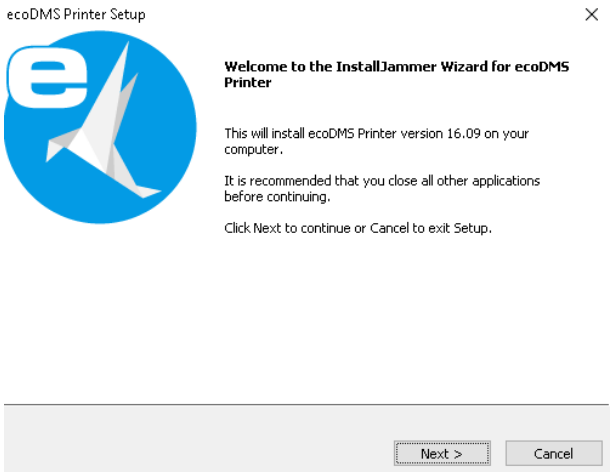

Fig. (similar) 2.38: PDF/A Printer Start Screen

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

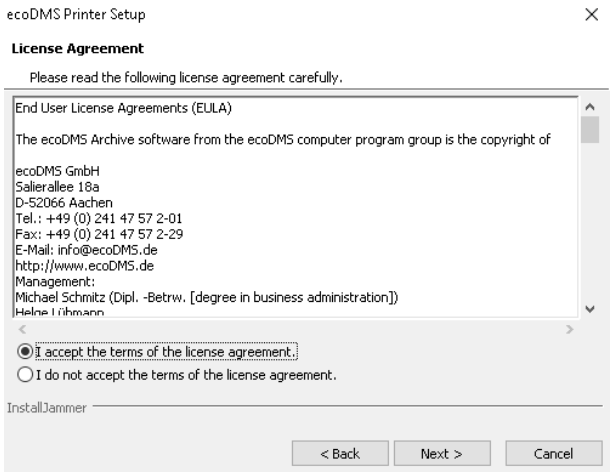

Fig. (similar) 2.39: PDF/A Printer: license Agreement

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

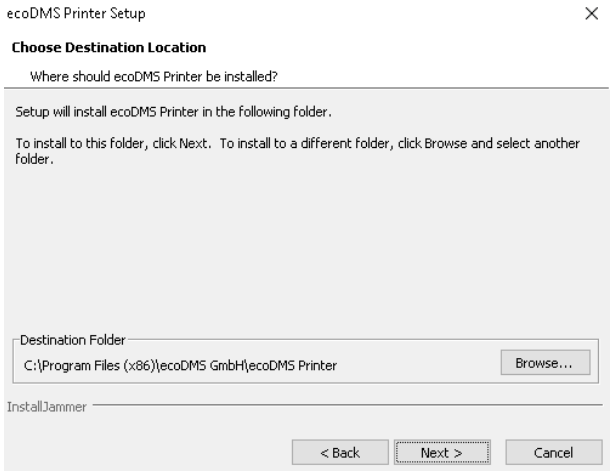

Fig. (similar) 2.40: PDF/A Printer: Installation Destination

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

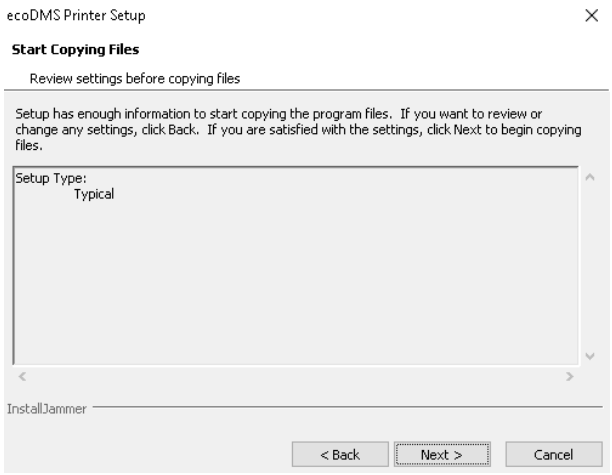

Fig. (similar) 2.41: PDF/A Printer: Copy Files

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

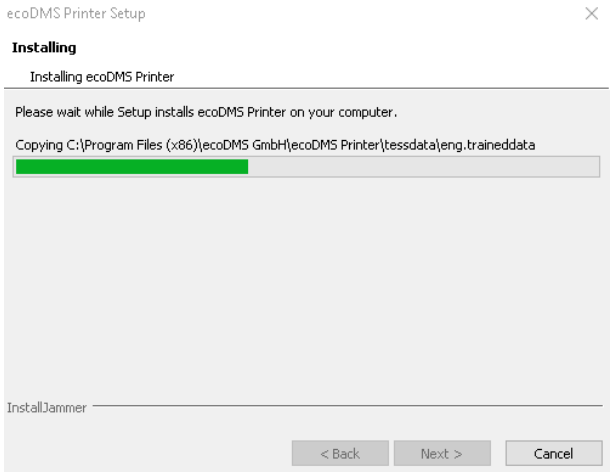

Fig. (similar) 2.42: PDF/A Printer: Installation

12. Depending on the system environment, Windows displays an other confirmation prompt during installation. Confirm this Windows confirmation prompt with "Install".

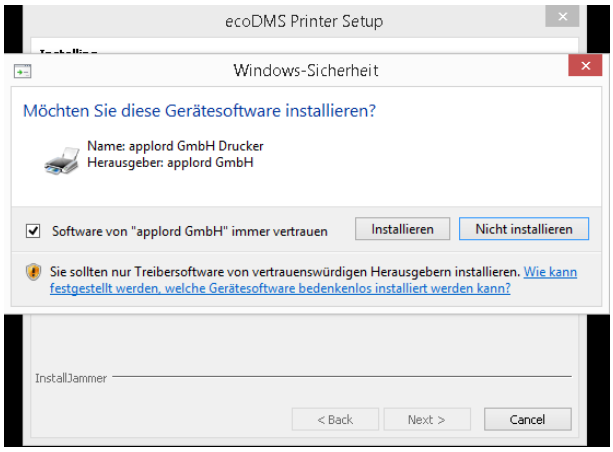

Fig. (similar) 2.43: PDF/A Printer: Security Message

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

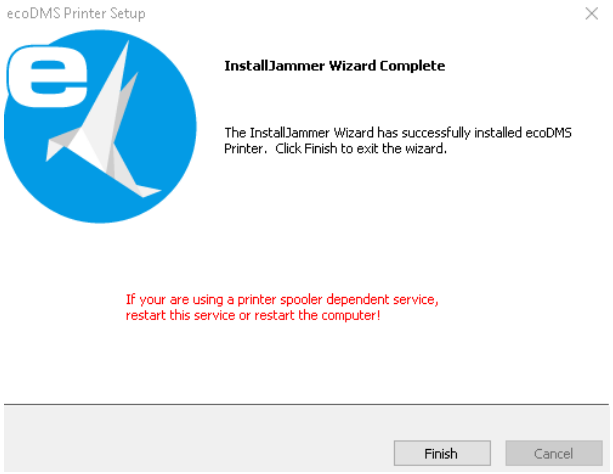

Fig. (similar) 2.44: PDF/A Printer: Installation Complete

2.2.6 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, 5, 1, 2, 6]:

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.

2.3 Uninstall

The following section describes how to uninstall ecoDMS components under Windows [3, 4, 2].

2.3.1 Basics

ecoDMS Server Uninstalling the ecoDMS Server component will irrevocably delete all stored databases. You cannot undo this operation.

Recovery Recovering the data requires a new installation of ecoDMS and importing a clean and complete data backup.

An error has occurred while uninstalling.

```
Stop this process to continue: ecodmssinglesignon.exe
```

If this message displays, the Connection Manager was not closed before uninstalling. As soon as you have closed the Connection Manager, you can start uninstalling ecoDMS.

Stop Connection Manager Please disconnect all user profiles connected with ecoDMS before uninstalling and exit the Connection Manager. The Connection Manager establishes the connection to the ecoDMS Server. To uninstall ecoDMS and/or other ecoDMS applications, for example, you must exit the Connection Manager. To exit the Connection Manager, complete the following steps:

1. Right-click the Connection Manager icon in the toolbar of your operating system.
2. Now click "Exit".

Attention: The connection to the ecoDMS Server is only terminated if the ecoDMS Client is closed and the connections have been disconnected in the Connection Manager at the respective workstation. Merely disconnecting the Connection Manager or closing the client will not unblock a License. To do this, close or disconnect all ecoDMS components and the Connection Manager at the workstation.

Note: You can find the Connection Manager on your toolbar. In Windows the icon usually displays next to the time. Depending on the number of other applications running on your PC, Windows hides some icons. Use the arrow to display the hidden icons. The same applies to Ubuntu and MacOS.

2.3.2 ecoDMS Server

The following explains the uninstall process of the ecoDMS Server under Windows [3, 4, 2].

1. First, Close all active ecoDMS Clients and Connection Managers and make sure that no user is connected with the server.

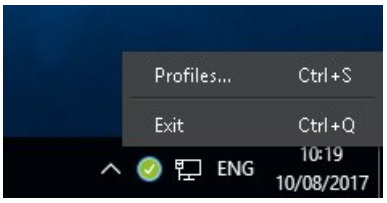

Fig. (similar) 2.45: Exit Connection Manager

2. In the Windows Control Panel, open the interface to uninstall installed software ("Uninstall Program").
3. Select the "ecoDMS Server" software by double-clicking it in the list of installed programmes.
4. The Uninstall wizard starts. This process may take a while.
5. Confirm the question whether you want to uninstall the programme with "Yes". Cancel the process with "No".

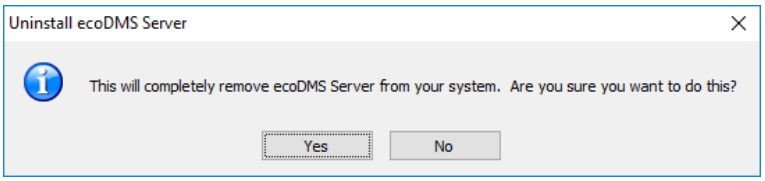

Fig. (similar) 2.46: ecoDMS Server - Uninstall - Question

6. The first Uninstall steps start. This operation may take a while.
7. 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 postgreSQL 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.

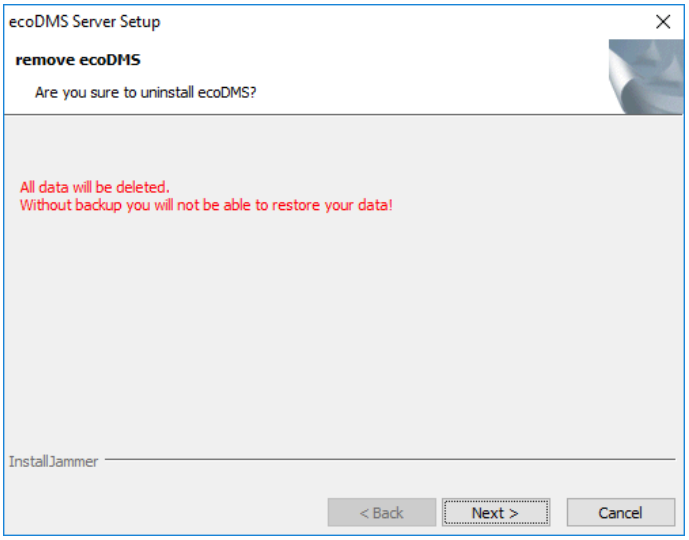

Fig. (similar) 2.47: ecoDMS Server - Uninstall - Database Information

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

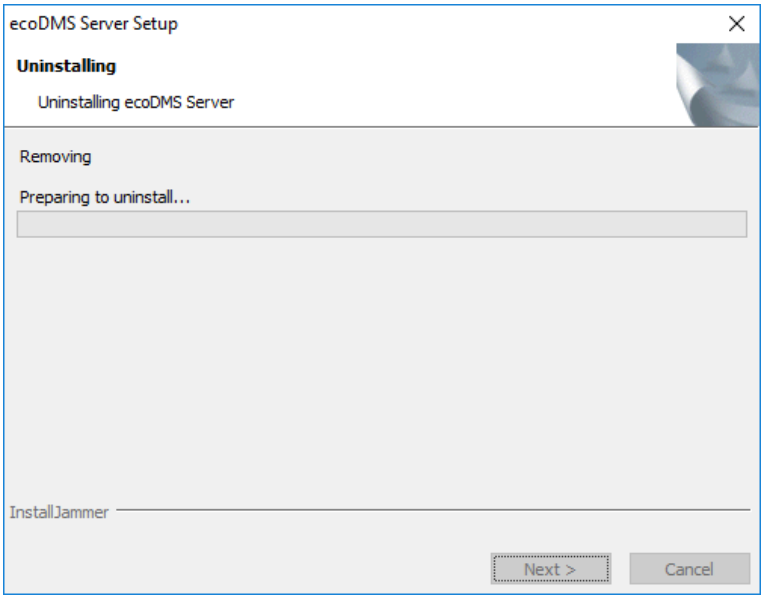

Fig. (similar) 2.48: ecoDMS Server - Uninstall - Processing

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

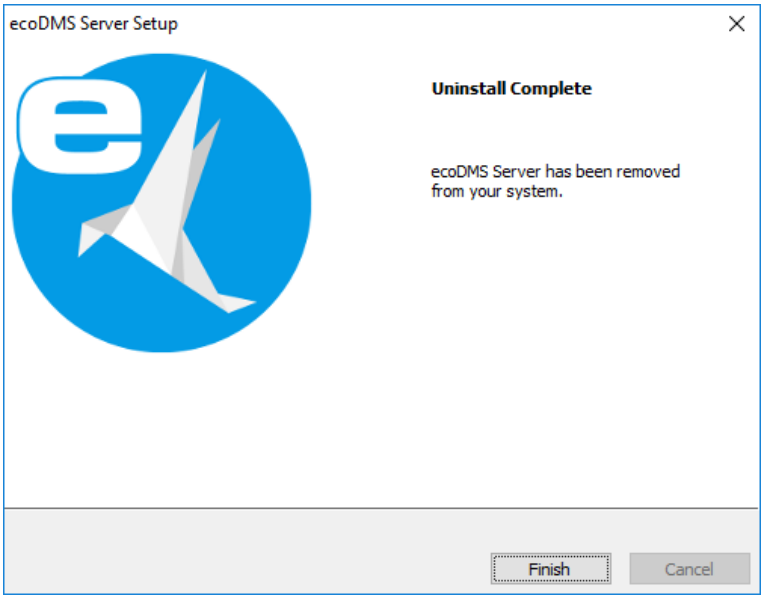

Fig. (similar) 2.49: ecoDMS Server - Uninstall - Completed

2.3.3 ecoDMS Client

The following explains the uninstall process of the ecoDMS Client under Windows [2].

1. First, Close all active ecoDMS Clients and Connection Managers and make sure that no user is connected with the server.

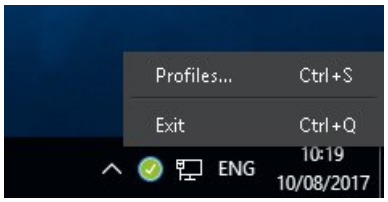

Fig. (similar) 2.50: Exit Connection Manager

2. In the Windows Control Panel, open the interface to uninstall installed software ("Uninstall Program").
3. Select the "ecoDMS Client" software by double-clicking it in the list of installed programmes.
4. The Uninstall wizard starts. This process may take a while.
5. Confirm the question whether you want to uninstall the programme with "Yes". Cancel the process with "No".

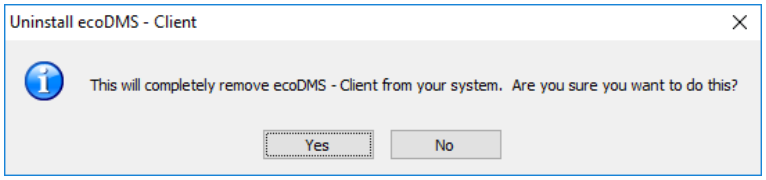

Fig. (similar) 2.51: ecoDMS Client - Uninstall - Question

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

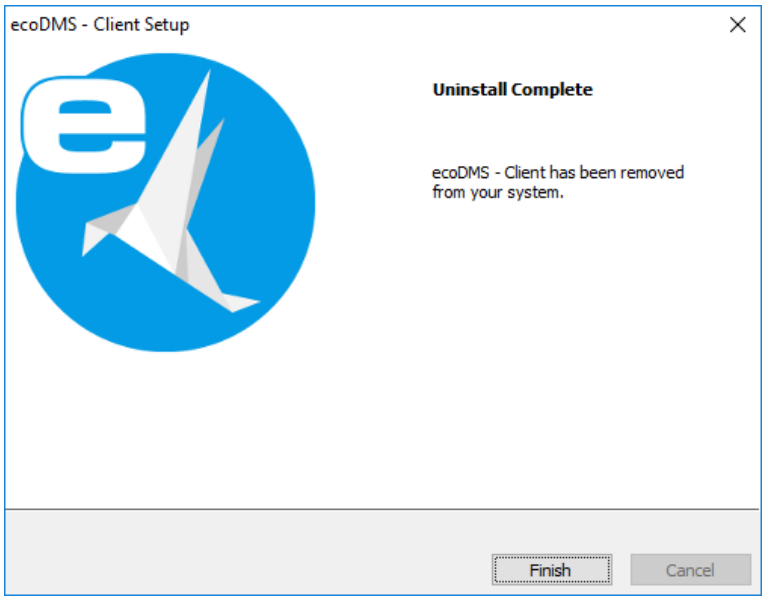

Fig. (similar) 2.52: ecoDMS Client - Uninstall - Completed

2.3.4 ecoDMS Printer

The following explains the uninstall process of the ecoDMS Printer under Windows [2].

1. First, Close all active ecoDMS Clients and Connection Managers and make sure that no user is connected with the server.

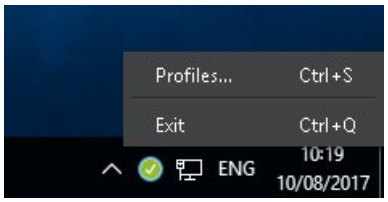

Fig. (similar) 2.53: Close Connection Manager

2. In the Windows Control Panel, open the interface to uninstall installed software ("Uninstall Program").
3. Select the "ecoDMS Printer" software by double-clicking it in the list of installed programmes.
4. The Uninstall wizard starts. This process may take a while.
5. Confirm the question whether you want to uninstall the programme with "Yes". Cancel the process with "No".

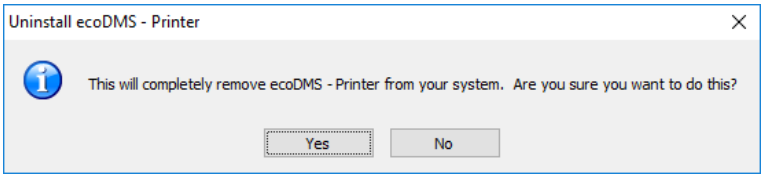

Fig. (similar) 2.54: ecoDMS Printer - Uninstall - Question

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

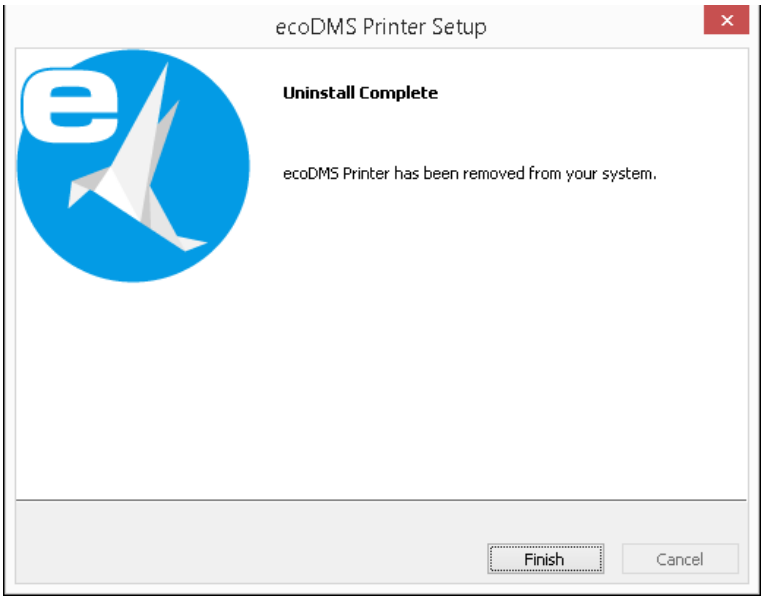

Fig. (similar) 2.55: ecoDMS Printer - Uninstall - Completed

Important Information for Chapter 2

[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] *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] *On Windows systems, the installation must be executed by a local administrator (not a domain administrator).*

[6] *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.*

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

3 Linux Distributions

This chapter describes the necessary steps for installing and uninstalling ecoDMS components under Linux distributions. In addition, it features a description of how to perform ecoDMS upgrades and important information about the individual processes.

3.1 Upgrade

The following section describes the upgrade process to the major release version 16.09 (eleanor) under Linux distributions.

3.1.1 Basics

1. If you are upgrading from the **previous ecoDMS version 14.08 (krusty)** to ecoDMS version 16.09 (eleanor), you must follow the upgrade steps in **this installation manual**.
   a) When upgrading from version 14.08 (krusty) to version 16.09 (eleanor), make sure that the last update 12 of ecoDMS 14.08 (krusty) is installed on your system.
   b) If this is not the case, you must update the previous version 14.08 (krusty) with update 12 before upgrading to version 16.09 (eleanor).
2. If you are upgrading from the **previous ecoDMS version 12.05 (brandine)** to ecoDMS version 16.09 (eleanor), please note the following information:
   a) When upgrading from version 12.05 (brandine) to version 16.09 (eleanor), 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).
3. Ensure you create a backup before updating or upgrading.
4. **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.

3.1.2 Process

Execute the upgrade by working through the following steps in the order specified. Please note the upgrade basics 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) **14.08 (krusty):** You can create the backup with the oneClick Backup component or with the console programme for manual backup.
   b) **12.05 (brandine):** 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.

   14.08 (krusty):

```
sudo apt-get remove ecodmsserver ecodmsclient ecoice ecodmsprinter
```

12.05 (brandine):

```
sudo apt-get remove ecosimsserver ecoDMS-Client ecoICE ecoDMSPrinter
```

4. Do not under any circumstances uninstall the postgreSQL database.
   a) Make sure that all components have been uninstalled.
   b) The components of the old and new version must not be mixed up.
5. Restart the computer after the uninstall process.
6. Now install the ecoDMS Server and the other components of the new ecoDMS version according to the new installation manual.
7. Restart your computer.
8. 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.
9. **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.

3.1.3 License Information

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

3.2 Installation

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

3.2.1 Basics

Please read the following information before installing:

- 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.
- **Please note that the ecoDMS packages for Ubuntu and Debian are only available for 64-bit systems.**
- **For Raspbian we offer a 32-bit version.**

3.2.2 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.

3.2.3 apt Sources

Before you can install the ecoDMS components, you must first define the necessary apt sources. Proceed as follows [2, 1, 4, 5].

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:

64bit / Ubuntu 14.04 LTS

```
deb http://www.ecodms.de/ecodms_160964/trusty /
```

64bit / Ubuntu 16.04 LTS

```
deb http://www.ecodms.de/ecodms_160964/xenial /
```

64bit / Ubuntu 18.04 LTS

```
deb http://www.ecodms.de/ecodms_160964/bionic /
```

64bit / Debian Jessie

```
deb http://ftp.de.debian.org/debian jessie-backports main
deb http://www.ecodms.de/ecodms_160964/jessie /
```

64bit / Debian Stretch

```
deb http://ftp.de.debian.org/debian stretch-backports main
deb http://www.ecodms.de/ecodms_160964/stretch /
```

32bit / Debian Jessie (Raspbian for Raspberry PI: Only ecoDMS Server)

```
deb http://www.ecodms.de/ecodms_160932/raspi/jessie /
```

32bit / Debian Stretch (Raspbian for Raspberry PI: Only ecoDMS Server)

```
deb http://www.ecodms.de/ecodms_160932/raspi/stretch /
```

3. Save your entry with "F2".
4. Exit the editor with"F10" or "ESC" (depending on the operating system).

5. Import the "ecoDMS Key" of "ecoDMS Repositories":

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

a) If you want to install ecoDMS under Ubuntu 14.08, you must process the following command. This process is not necessary for other Linux distributions.

```
sudo add-apt-repository ppa:openjdk-r/ppa
```

b) If you want to install ecoDMS under Raspbian Jessie, you must process the following commands. This process is not necessary for other Linux distributions.

```
sudo su
echo "deb http://ppa.launchpad.net/webupd8team/java/ubuntu xenial main" | \
 tee /etc/apt/sources.list.d/webupd8team-java.list
echo "deb-src http://ppa.launchpad.net/webupd8team/java/ubuntu xenial main" | \
 tee -a /etc/apt/sources.list.d/webupd8team-java.list
apt-key adv --keyserver hkp://keyserver.ubuntu.com:80 --recv-keys EEA14886
```

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

```
sudo apt-get update
```

3.2.4 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, 4, 5].

- **If you have installed several Java Runtime environments, please ensure that the following package is installed:**
  - Java 8:

    ```
    oracle-java8-unlimited-jce-policy
    ```

  - Java 7:

    ```
    oracle-java7-unlimited-jce-policy
    ```

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

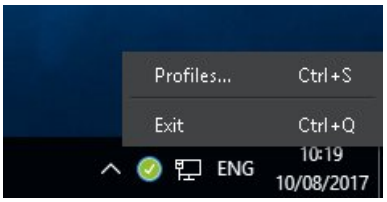

Fig. (similar) 3.1: Exit Connection Manager

2. 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 license 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.

3.2.5 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, 4, 5].

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

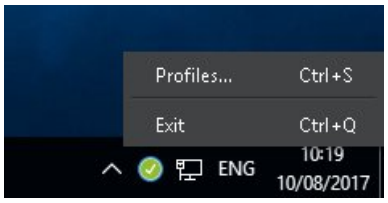

Fig. (similar) 3.2: Exit Connection Manager

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 license 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.

3.2.6 ecoDMS Printer

Use this steps to install the ecoDMS virtual PDF/A Printer (Printer driver). The following explains the installation process of the ecoDMS Printer under Linux distributions [1, 4, 5].

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

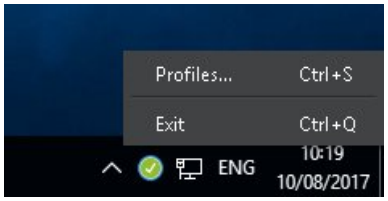

Fig. (similar) 3.3: Exit Connection Manager

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 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 license 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.

3.3 Uninstall

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

3.3.1 ecoDMS Server

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

1. First, Close all active ecoDMS Clients and Connection Managers and make sure that no user is connected with the server.

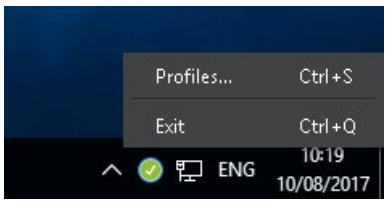

Fig. (similar) 3.4: Exit Connection Manager

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

```
sudo apt-get remove ecodmsserver
```

3.3.2 ecoDMS Client

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

1. First, Close all active ecoDMS Clients and Connection Managers and make sure that no user is connected with the server.

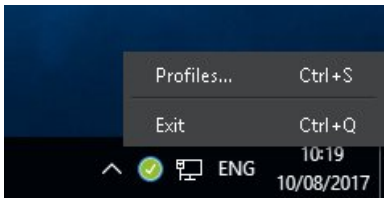

Fig. (similar) 3.5: Exit Connection Manager

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

```
sudo apt-get remove ecodmsclient
```

3.3.3 ecoDMS Printer

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

1. First, Close all active ecoDMS Clients and Connection Managers and make sure that no user is connected with the server.

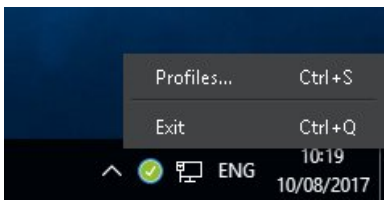

Fig. (similar) 3.6: Exit Connection Manager

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

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

Important Information for Chapter 3

[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.*

[4] *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.*

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

4 NAS

This chapter describes the necessary steps for installing ecoDMS components on an NAS and as Docker image. In addition, it features a description of how to perform ecoDMS upgrades and updates and important information about the individual processes.

4.1 Upgrade

The following section describes the upgrade process to the **major release** version 16.09 (eleanor) on a NAS (Network Attached Storage).

4.1.1 Basics

1. If you are upgrading from the **previous ecoDMS version 14.08 (krusty)** to ecoDMS version 16.09 (eleanor), you must follow the upgrade steps in **this installation manual**.
   a) When upgrading from version 14.08 (krusty) to version 16.09 (eleanor), make sure that the last update 12 of ecoDMS 14.08 (krusty) is installed on your system.
   b) If this is not the case, you must update the previous version 14.08 (krusty) with update 12 before upgrading to version 16.09 (eleanor).
2. If you are upgrading from the **previous ecoDMS version 12.05 (brandine)** to ecoDMS version 16.09 (eleanor), please note the following information:
   a) When upgrading from version 12.05 (brandine) to version 16.09 (eleanor), 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).
3. Ensure you create a backup before updating or upgrading.
4. Do not change or delete the data directory when you make an update / upgrade.
5. **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.

4.1.2 Upgrade

Execute the upgrade from 14.08 to 16.09 by working through the following steps in the order specified. Please note the upgrade basics 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.
3. Do not change or delete the data directory when you make an update / upgrade.

4. Close all active ecoDMS Clients and Connection Managers and make sure that no user is connected with the server.

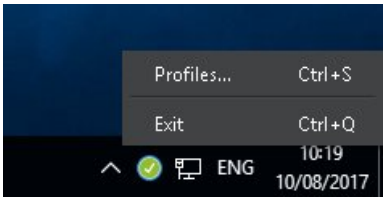

Fig. (similar) 4.1: Exit Connection Manager

5. If you have not already done so, deactivate the ecoDMS license according to the instructions in the ecoDMS manual (chapter "Activate License).
6. Stop the ecoDMS Server on your NAS system.
7. Delete this ecoDMS container now.
8. Search at "Docker - Registration" for the "ecodms/allinone-16.09" package.
9. Download the ecoDMS package "ecodms/allinone-16.09".
10. Now click on "ecodms/allinone-16.09" under "image".
11. Click "Start" to start the image.
    a) Please use the same path as for the previous installation under "Volume" in the "Mount paths".

4.1.3 License Information

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

4.2 Update

The following section describes the update process to a **minor release** of ecoDMS version 16.09 (eleanor) on a NAS (Network Attached Storage).

4.2.1 Basics

1. Ensure you create a backup before updating.
2. **Before updating the container, deactivate the existing ecoDMS license.**
    a) Please follow the steps for deactivation and activation, as shown in the ecoDMS manual.
3. **Before updating the NAS firmware, you must stop the running containers.**
4. You must always update all installed components (ecoDMS Server, ecoDMS Client, ecoDMS Printer, Plugins).
5. The already existing ecoDMS folders on the NAS contain the ecoDMS data and are required for creating the container.
6. When installing an update, you must ensure that the existing folders on the NAS are assigned to the mount paths.

4.2.2 Container-Update

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

1. First, Close all active ecoDMS Clients and Connection Managers and make sure that no user is connected with the server.

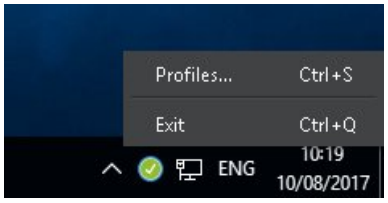

Fig. (similar) 4.2: Exit Connection Manager

2. Stop the ecoDMS container.
3. To update a container, **delete the existing container and the local image** of the installation.
   a) **Do not delete this data folder!**
4. Then create the new container with **the same data folder**.
5. To do so, complete the steps described from section "Container Settings" for the Synology and QNAP installation onwards.

4.2.3 License Information

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

4.3 Synology Installation (ecoDMS Server)

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

4.3.1 Create Folder Structure for ecoDMS (Example)

For a standard ecoDMS installation on a NAS you require

1. a folder for the data (e.g. under "Container"),
2. a shared folder for
   a) Backup,
   b) Restore
   c) and Scaninput.

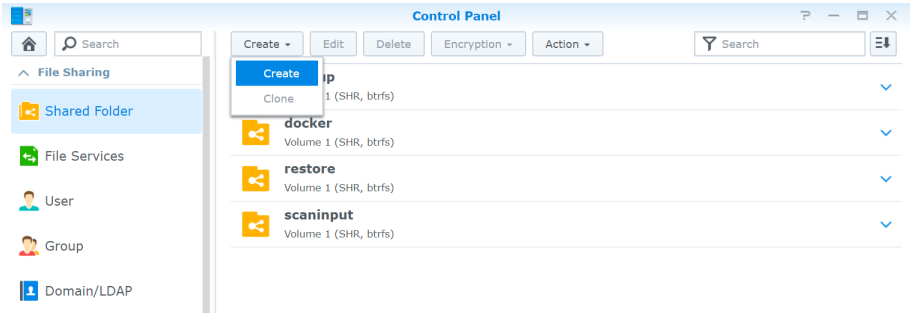

Fig. (similar) 4.3: Synology - Create Shared Folder

To access folders in the "Shared Folders", set the respective permissions.

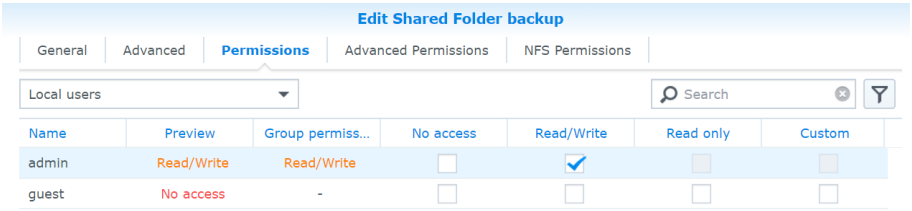

Fig. (similar) 4.4: Synology - Shared Folder - Permissions

A typical folder structure could look like this:

```
ecoDMS data: Folder
ecoDMS: Shared Folder
              ecoDMS Backup: Folder
              ecoDMS Restore: Folder
              ecoDMS Scaninput: Folder
```

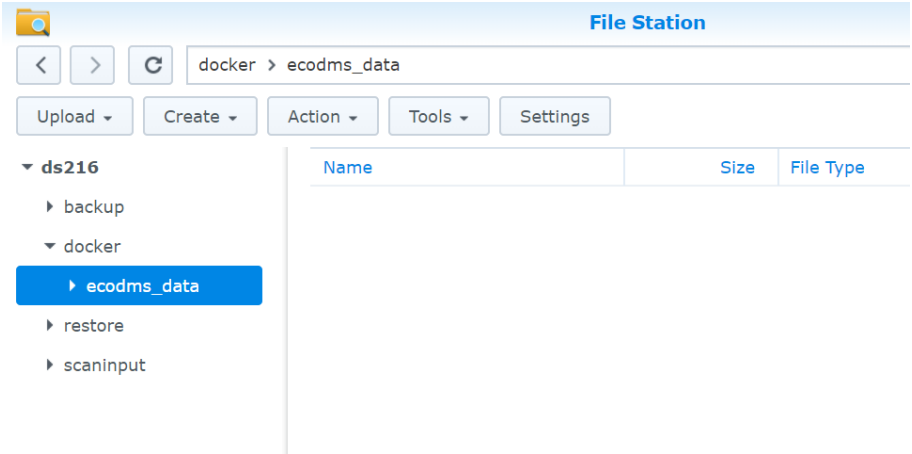

Fig. (similar) 4.5: Synology - Folder Structure (Example)

4.3.2 Install & Open Docker

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

Fig. (similar) 4.6: Synology - Install Docker App

4.3.3 Search & Install ecoDMS Images

1. In the "Registration" area of the "Docker" app, search for the "ecoDMS image" with the name "ecodms/allinone-16.09".
2. Then install the package by
   a) right-clicking "ecodms/allinone-16.09" and
   b) then clicking "Download This Image".
   c) **If you have already installed a package, delete the local image "ecodms/allinone-16.09" before installing the new image. Otherwise, "Docker" will install the local image without including any interim updates.**

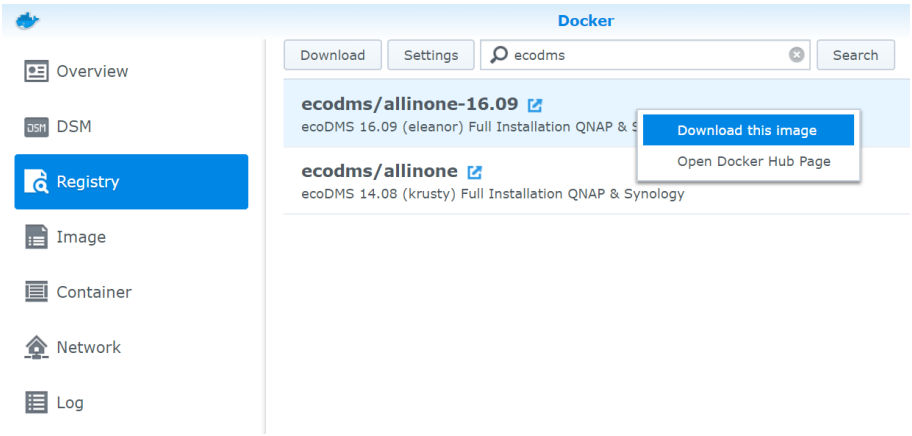

Fig. (similar) 4.7: Synology - Install ecoDMS Image

4.3.4 Create Container

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

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

4.3.5 Container Settings

1. In the next step, assign a name to the container.

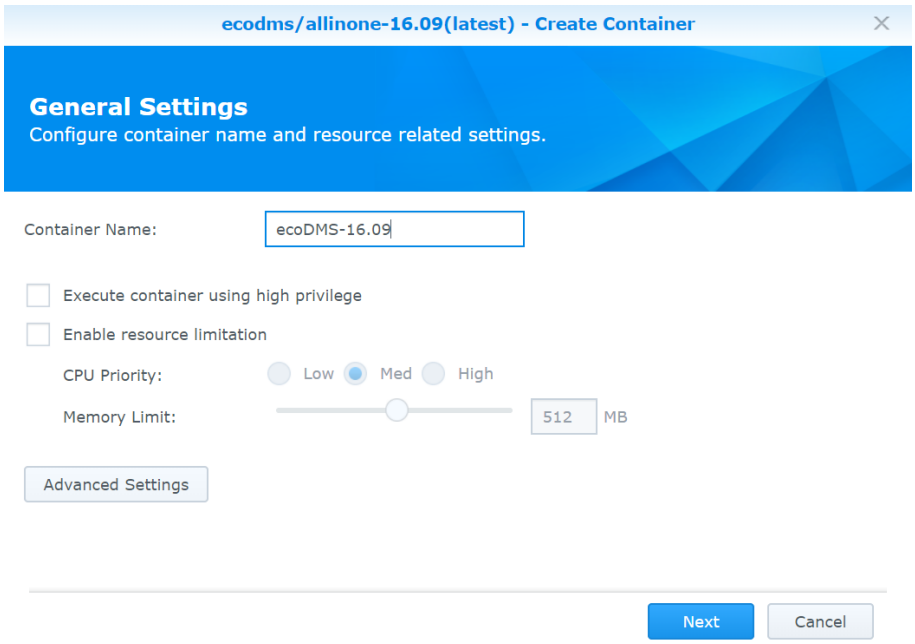

Fig. (similar) 4.8: Synology - Container Name

2. Click "Extended Settings".
3. Select the "Port Settings" tab.
   a) The following figure shows an example for the configuration of "Port Forwarding":
      i. Container port: 17001 (ecoDMS) → Access via ecoDMS connection manager (17001)
      ii. Container port: 17002 (ecoDMS) → Database access
      iii. Container port: 8080 (web interface) → External access via port 17004
      iv. Container port: 8180 (API) → External access via port 17005

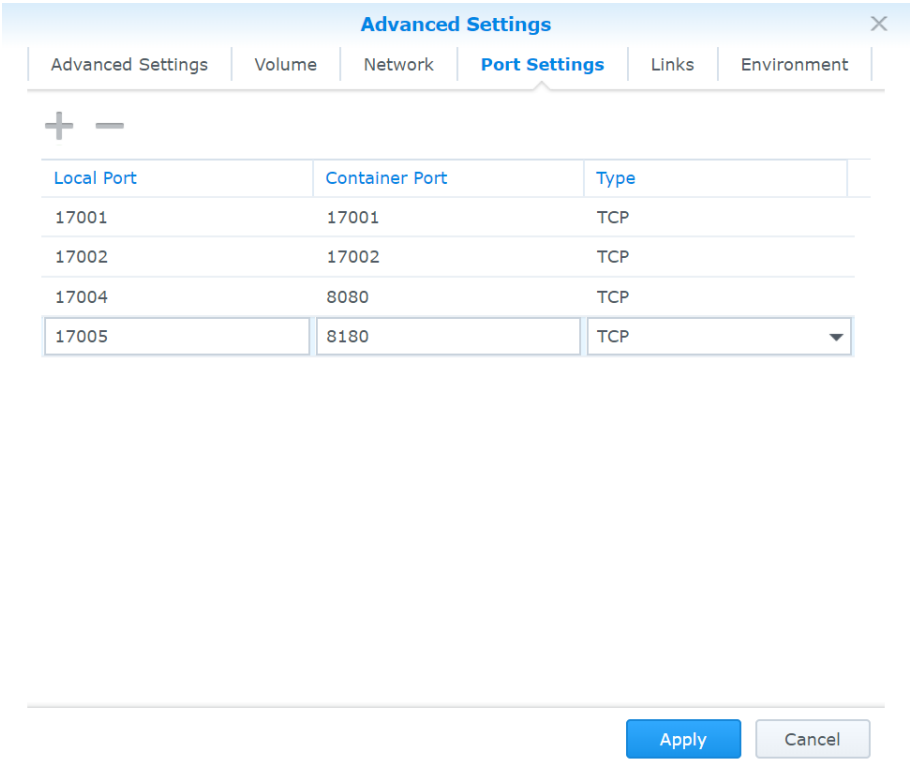

Fig. (similar) 4.9: Synology - Extended Settings (Port)

4. Now select the "Volume" tab.

4.3.6 Configure Mount Paths

1. On the "Volume" tab, click "Add Folder".

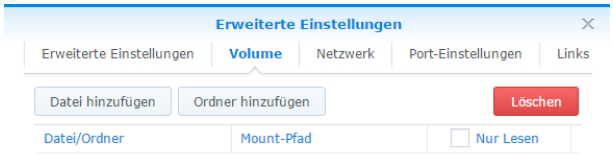

Fig. (similar) 4.10: Synology - Extended Settings - Add Folder

2. Now select the location where you want to save your ecoDMS data on the NAS.

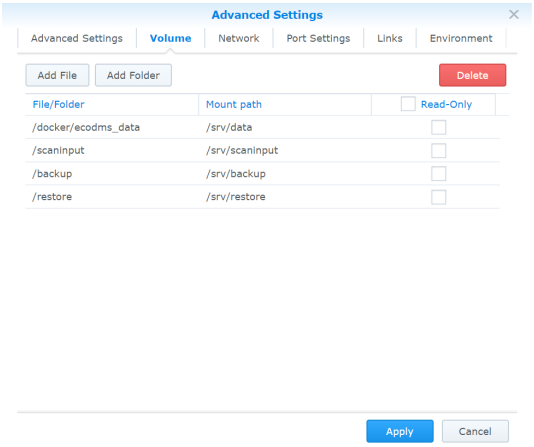

Fig. (similar) 4.11: Synology - Extended Settings - ecoDMS Data Storage Location

a) It is important that
   i. you select "/srv/data" as mount path for the data folder,
   ii. the "read / write" permissions, and
   iii. that the **"Administrators" Group** has **read and write access** for the selected shared folder.
   iv. To use the ecoDMS backup and restore function, create a folder for backup and a folder for restore. The mount paths are:

```
/srv/backup
/srv/restore
```

      A. The backup and restore folders should be stored separately from the actual ecoDMS data and backed up accordingly.

   v. Create a "Scaninput" folder for scanned documents.

```
/srv/scaninput
```

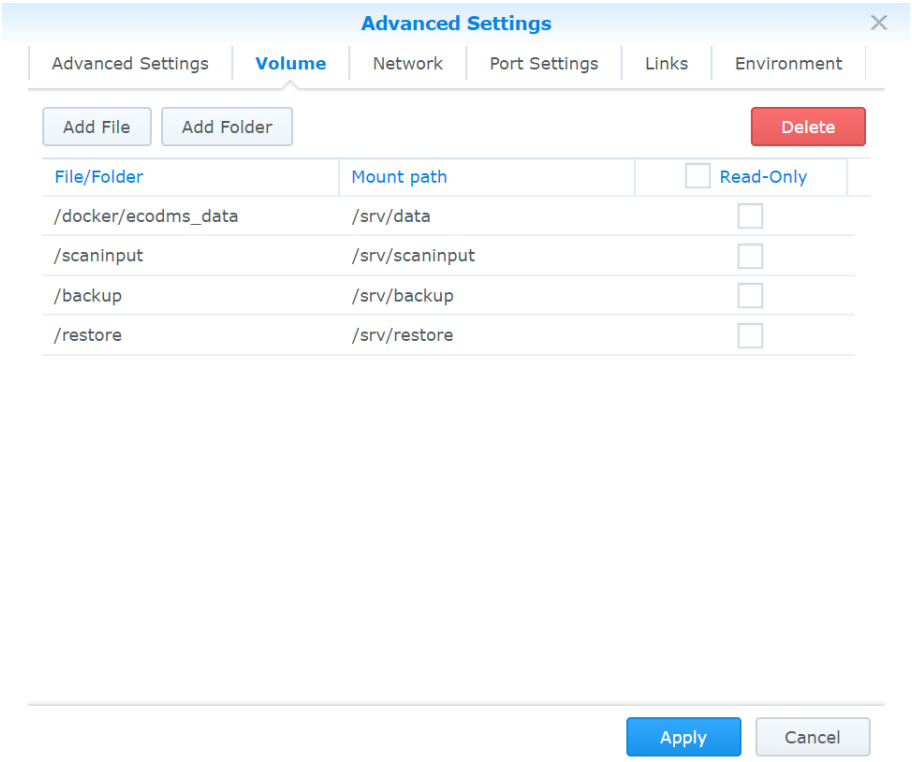

Fig. (similar) 4.12: Synology - Extended Settings - Volume

4.3.7 Change Language (English)

As an option, you can change the language from German to English. To do so, set the following environment variable in the Extended Settings under "Environment" when setting up the container [1]:

```
LANG=eng
```

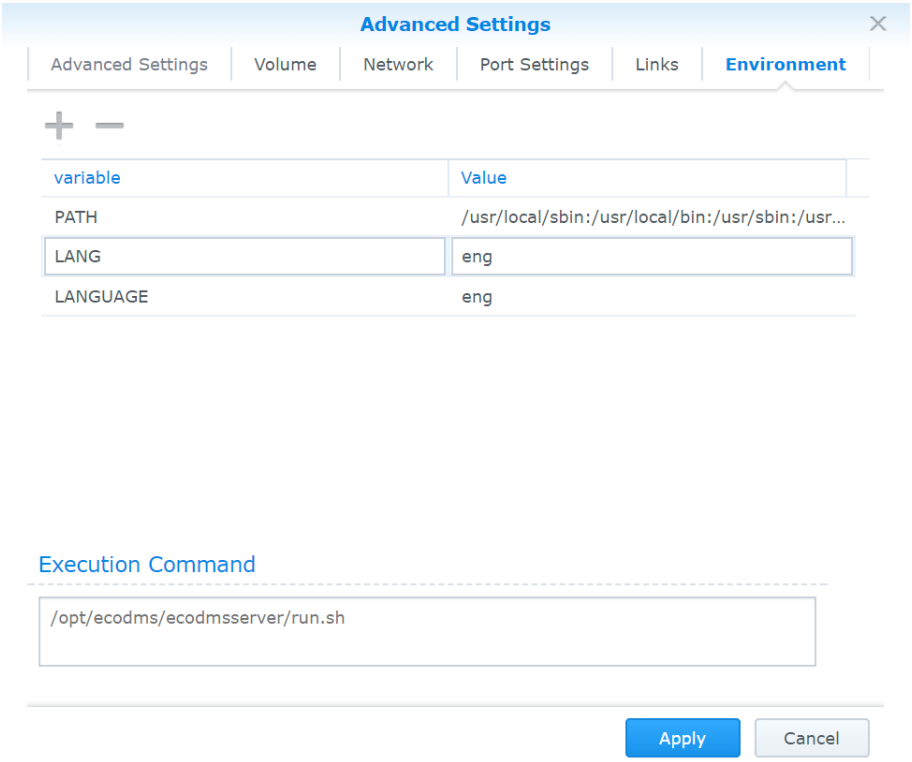

Fig. (similar) 4.13: Synology - Extended Settings - Change Language (English)

4.3.8 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 Synology IP address.
   a) Enter this address as "Server" in the connection manager.
2. Upon initial starting, it may take a while until the system can access ecoDMS.

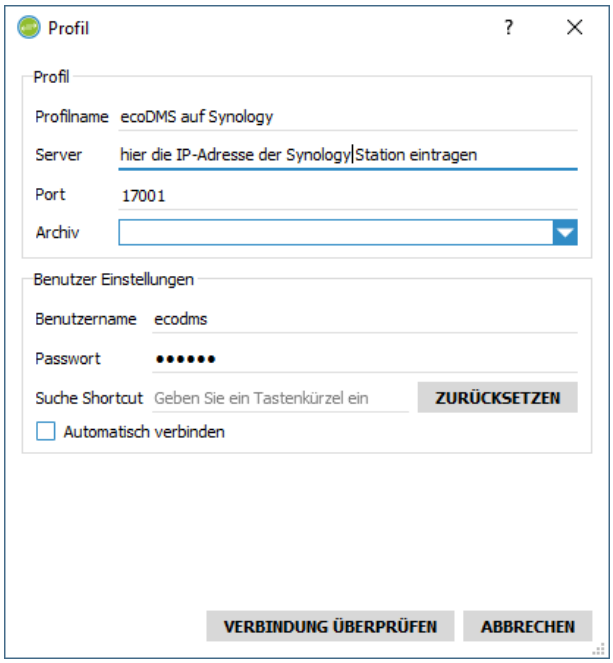

Fig. (similar) 4.14: Synology - Connection Manager - Setup Connection

4.4 QNAP Installation (ecoDMS Server)

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

4.4.1 Create Folder Structure for ecoDMS (Example)

For a standard ecoDMS installation on a NAS you require

- a folder for the data (e.g. under "Container")
- and shared folders for
  - Backup,
  - Restore
  - and Scaninput.

The "scaninput" folder (as well as "backup" and "restore") must be setup when creating the container. QNAP does not allow you to mount more folders afterwards. In this case, you would have to recreate the container, the data folder would remain untouched.

A typical folder structure could look like this:

```
ecoDMS data: Folder
ecoDMS: Shared folder
              ecoDMS Backup: Folder
              ecoDMS Restore: Folder
              ecoDMS Scaninput: Folder
```

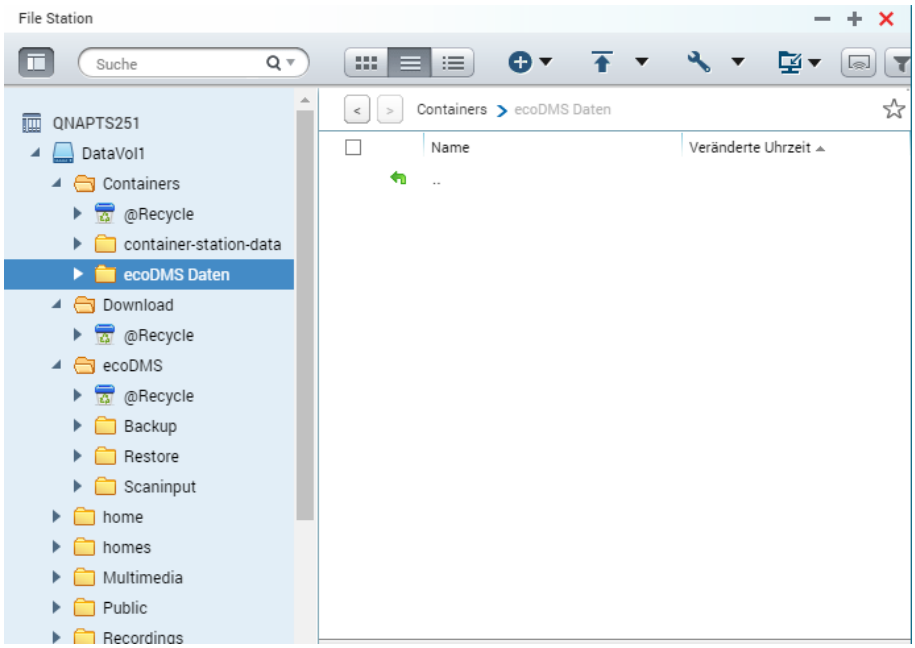

Fig. (similar) 4.15: QNAP - Folder Structure (Example)

4.4.2 Install & Open ContainerStation

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

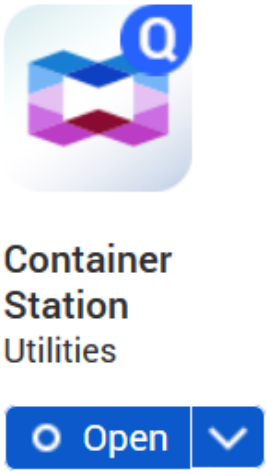

Fig. (similar) 4.16: QNAP - AppCenter - Install ContainerStation

4.4.3 Search & Install ecoDMS Images

1. In the "Create Container" area of the "Container Station" app, search for the "ecoDMS image" with the name "ecodms/allinone-16.09".
2. Then install the package by clicking "Create".
   a) **If you have already installed an earlier package, delete the local image "ecodms/allinone-16.09" before installing the new image. Otherwise, "ContainerStation" will install the local image without including any interim updates.**

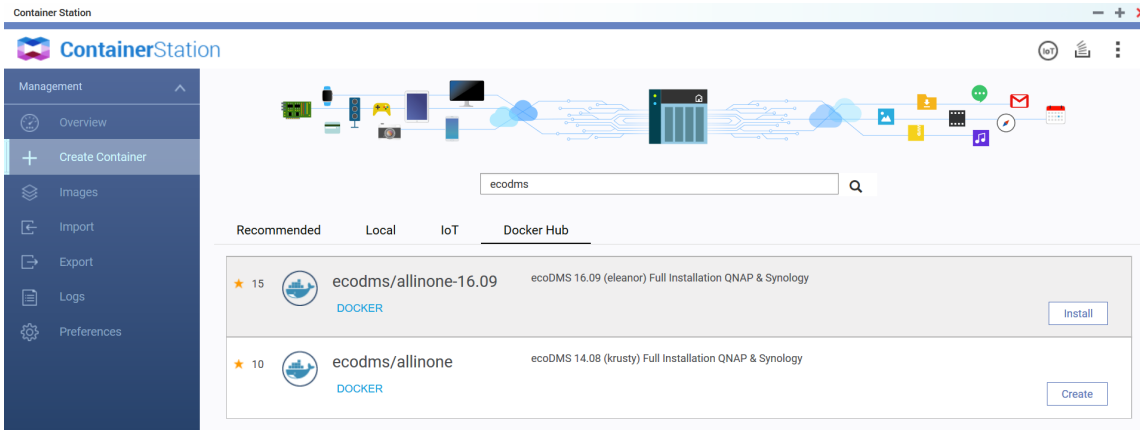

Fig. (similar) 4.17: QNAP - ContainerStation - ecoDMS Image

4.4.4 Container Settings

1. In the next step, assign a name to the container.

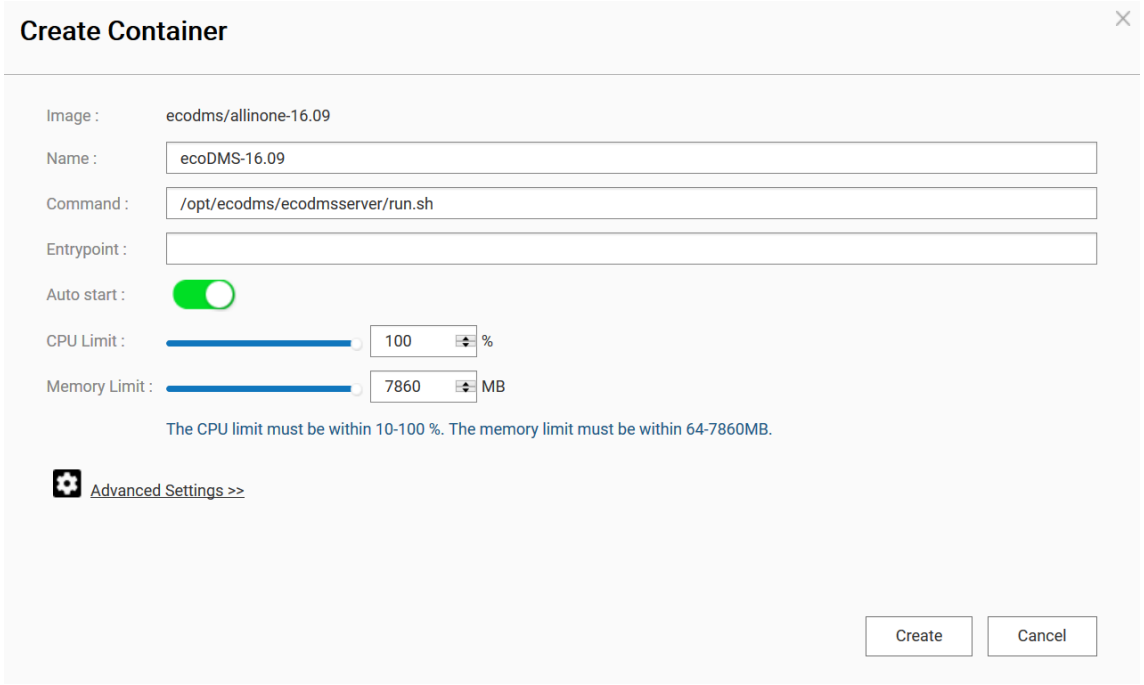

Fig. (similar) 4.18: QNAP - Assign Container Name

2. Click "Extended Settings".
3. Select the "Network" setting.
4. Now you can make the "Port Settings".
   a) The following figure shows an example for the configuration of "Port Forwarding":
      i. Container port: 17001 (ecoDMS) → Access via ecoDMS connection manager (17001)
      ii. Container port: 17002 (ecoDMS) → Database access
      iii. Container port: 8080 (web interface) → External access via port 17004
      iv. Container port: 8180 (API) → External access via port 17005

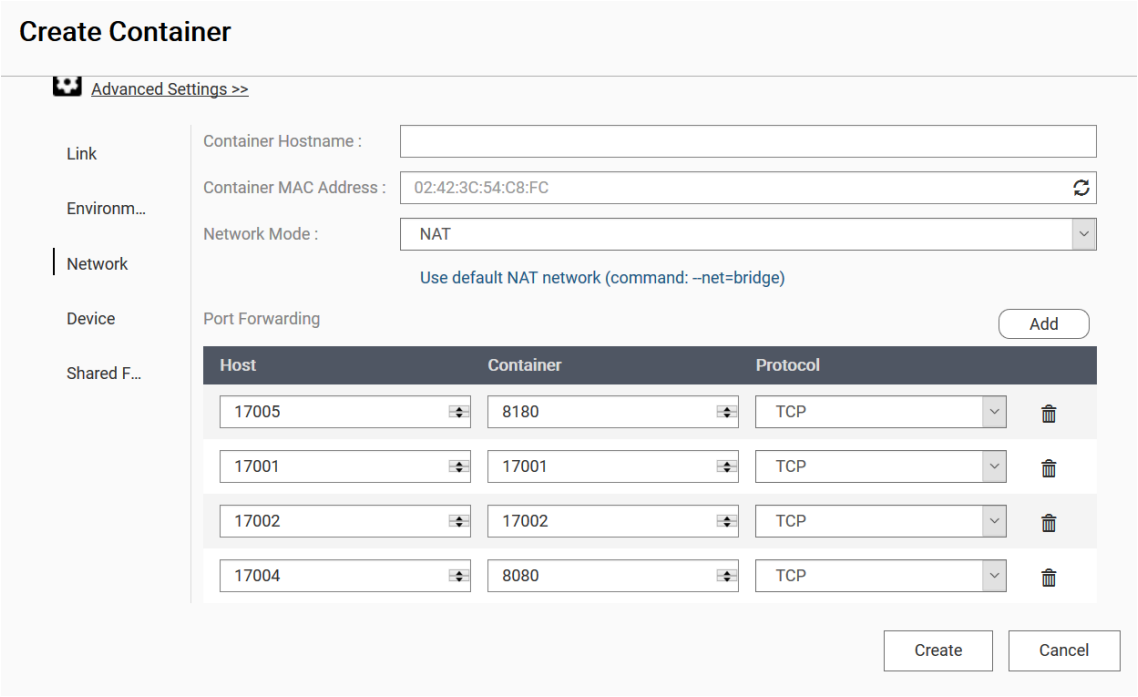

Fig. (similar) 4.19: QNAP - Port Forwarding (Example)

4.4.5 Configure Mount Paths

1. Select the "Shared Folders" area.
2. Select the location where you want to save your ecoDMS data on the NAS (see figure) in the "Shared Folders" area.
   a) It is important that
      i. you select "/srv/data" as mount path for the data folder,
      ii. the "read / write" permissions, and
      iii. that the **"Administrators" Group has read and write access** to the selected shared folder.
      iv. To use the ecoDMS backup and restore function, create a folder for backup and a folder for restore. The mount paths are:

```
/srv/backup
/srv/restore
```

      A. The backup and restore folders should be stored separately from the actual ecoDMS data and backed up accordingly.

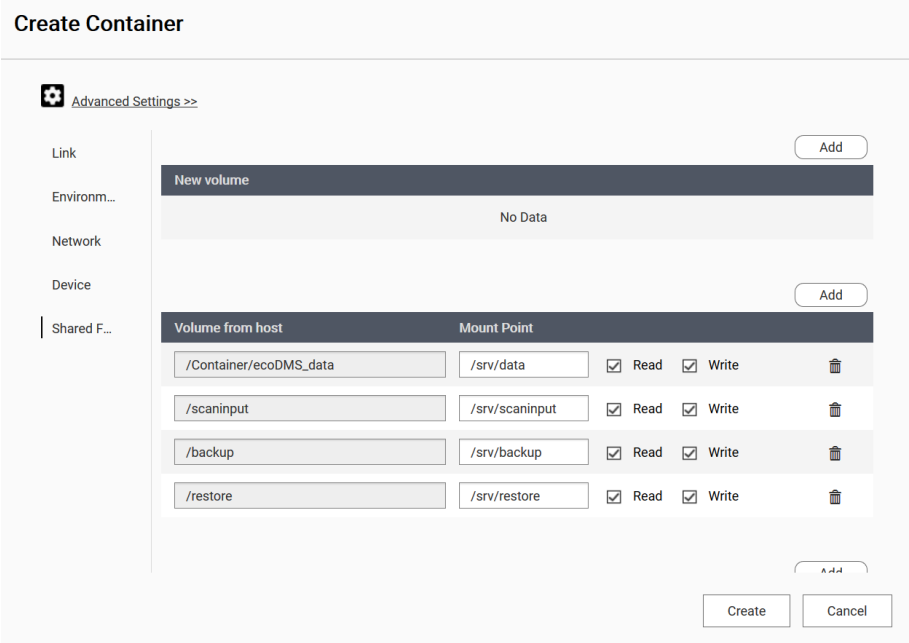

Fig. (similar) 4.20: QNAP - Container - Storage Location

3. Click "Create" to finish the setup process.

4.4.6 Change Language (English)

As an option, you can change the language from German to English. To do so, set the following environment variable in the Extended Settings under "Environment" when setting up the container [1]:

```
LANG=eng
```

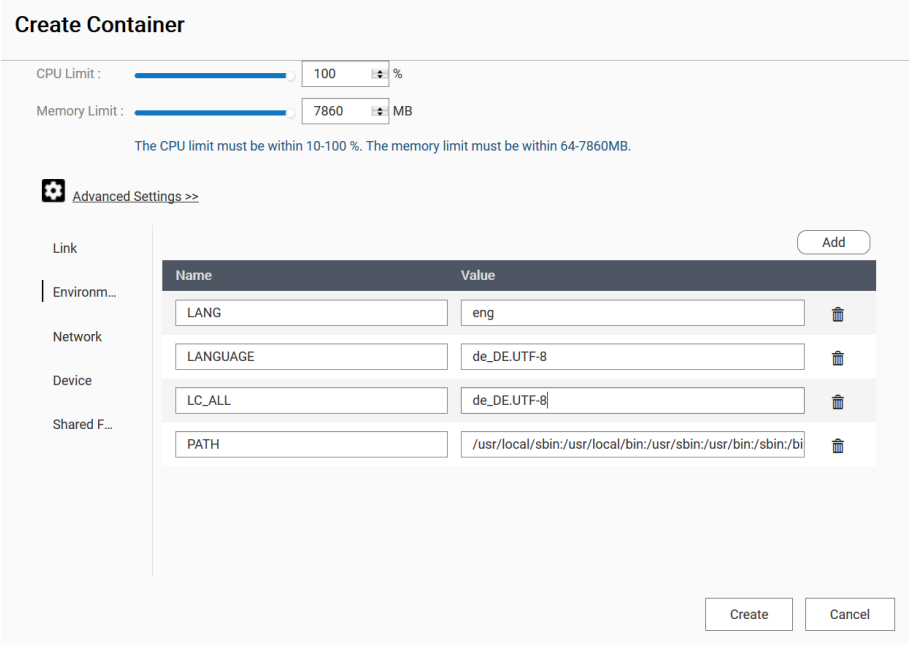

Fig. (similar) 4.21: QNAP - Advanced Container Settings - Change Language

4.4.7 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 QNAP IP address.
   a) Enter this address as "Server" in the connection manager.
2. Upon initial starting, it may take a while until the system can access ecoDMS.

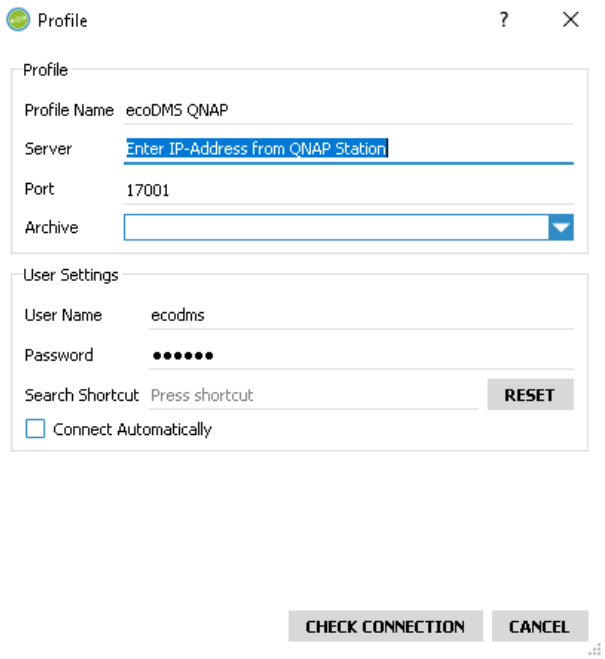

Fig. (similar) 4.22: QNAP - Connection Manager - Setup Connection

4.5 Docker Installation (ecoDMS Server)

To use ecoDMS, we recommend you to connect the 3 directories via "Mount" and make the standard port and webclient known outside the container. To install ecoDMS on Docker, enter the following commands:

```
docker run --restart=always -it -d -p 17001:17001 -p 17004:8080 --name "ecodms" -v /volume2/
    ecodmsData:/srv/data -v /volume1/ecoDMS/scaninput:/srv/scaninput -v /volume1/ecoDMS/backup:/
    srv/backup -v /volume1/ecoDMS/restore:/srv/restore -t ecodms/allinone-16.09
```

4.5.1 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.
- You should store the backup and restore directories separate from the ecoDMS data and save them accordingly.

Important Information for Chapter 4

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

5 MacOS

This chapter describes the necessary steps for installing and uninstalling ecoDMS components under Mac OS. In addition, it features important information about the individual processes.

5.1 Installation

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

5.1.1 ecoDMS & ecoICE Clients

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

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

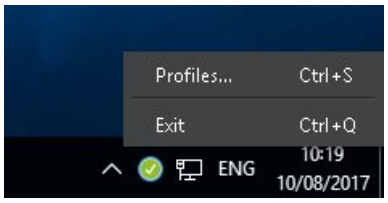

Fig. (similar) 5.1: Exit Connection Manager

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 "....mpkg".
5. Click "Continue" in the "Introduction Screen".

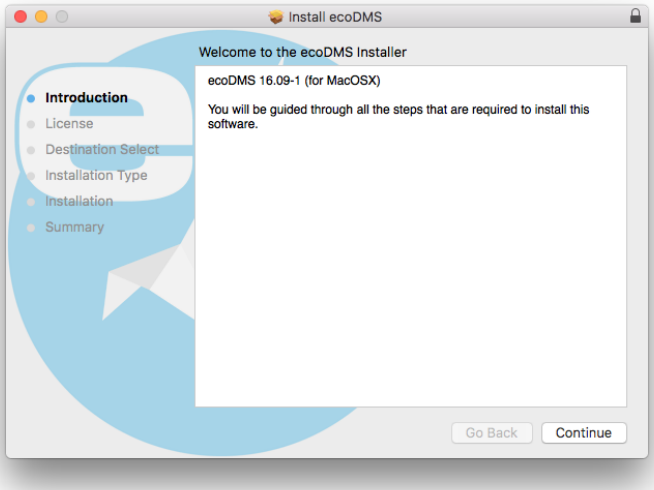

Fig. (similar) 5.2: MacOS Client: Introduction

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 license agreement carefully and click "Continue".

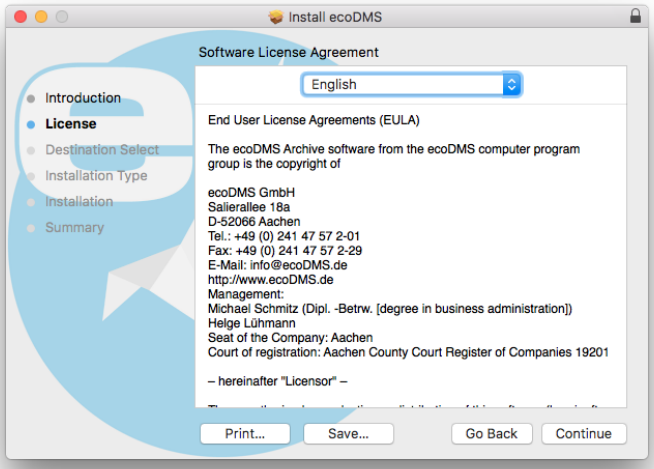

Fig. (similar) 5.3: MacOS Client: Language and License

7. Confirm the license agreement with "Agree".

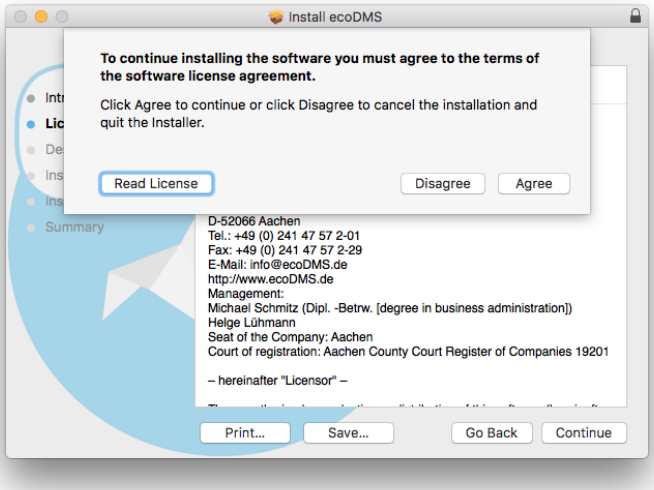

Fig. (similar) 5.4: MacOS Client: Accept License Agreement

8. Select the the disk where you want to install the ecoDMS software and click "Continue".

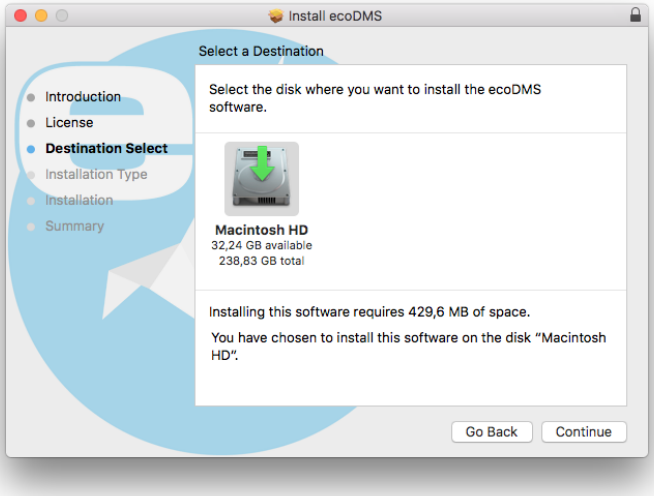

Fig. (similar) 5.5: MacOS Client: Installation Disk

9. Click "Install" to start the installation.
   a) You may be asked to enter your system login credentials to continue the installation. Enter your MacOS login credentials and click "Install Software" to start the installation.
   b) The installation is performed. This operation may take a while.

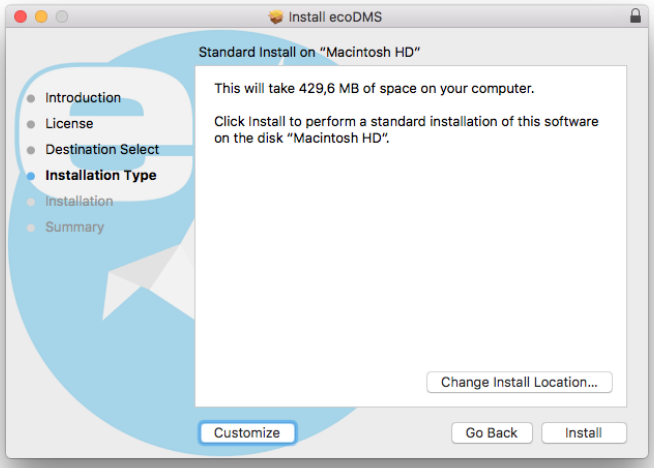

Fig. (similar) 5.6: MacOS Client: Installation

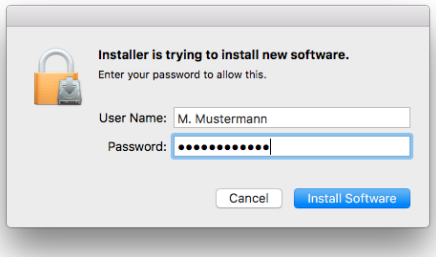

Fig. (similar) 5.7: MacOS Client: Enter Access Data

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

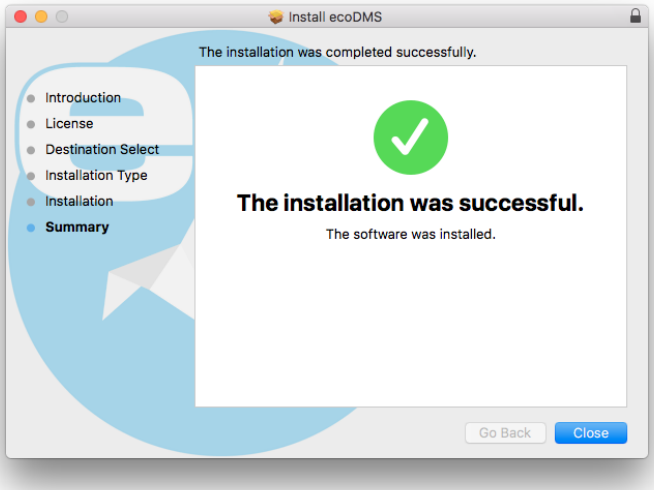

Fig. (similar) 5.8: MacOS Client: Installation Complete

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

The ecoDMS Server and ecoDMS 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.

5.2 Uninstall

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

5.2.1 ecoDMS Client

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

1. First, Close all active ecoDMS Clients and Connection Managers and make sure that no user is connected with the server.

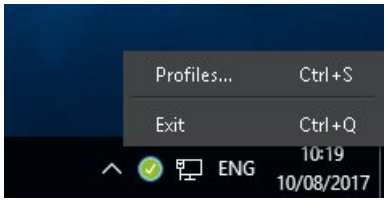

Fig. (similar) 5.9: Exit Connection Manager

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 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 5

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

6 Plugins & Addons

This chapter describes the necessary steps for installing and uninstalling ecoDMS plugins and addons under the supported operating systems. In addition, it features important information about the individual processes.

6.1 Installation

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

6.1.1 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 "ecoDMSOfficePluginSetup.exe".
5. Depending on the system environment, Windows displays a confirmation prompt for the "User Account Control" during installation. Confirm with "Yes" when asked whether you want to allow the following programme to make changes to this computer.

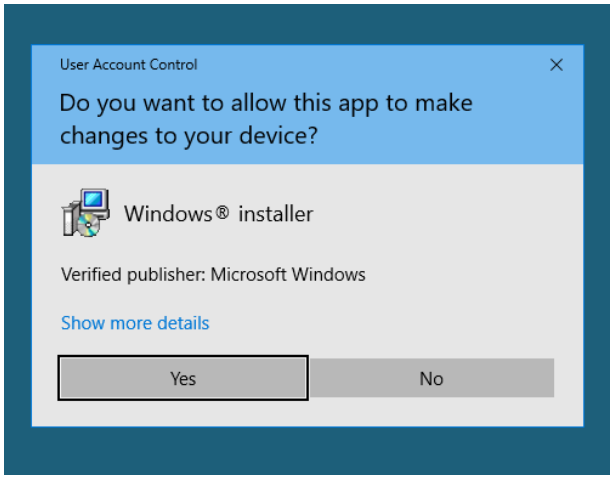

Fig. (similar) 6.1: Windows Confirmation Prompt - MS Office Plugin

6. In the first step you must accept the license 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.

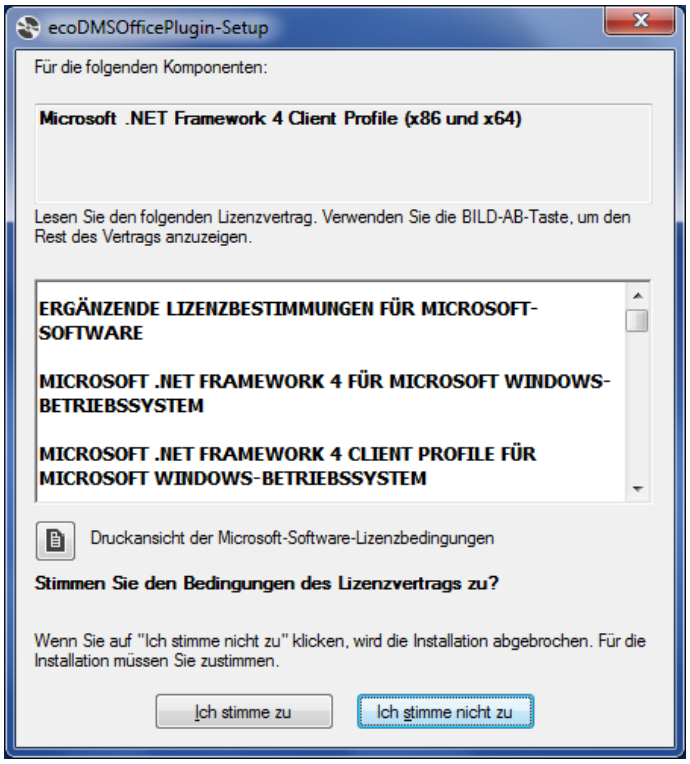

Fig. (similar) 6.2: MS Office Plugin - license: Framework

7. 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.

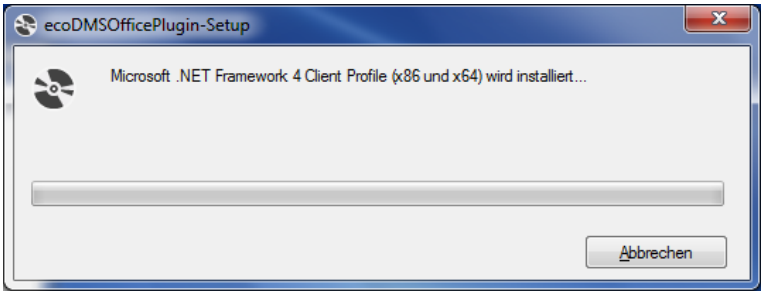

Fig. (similar) 6.3: MS Office Plugin - Installation Framework

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

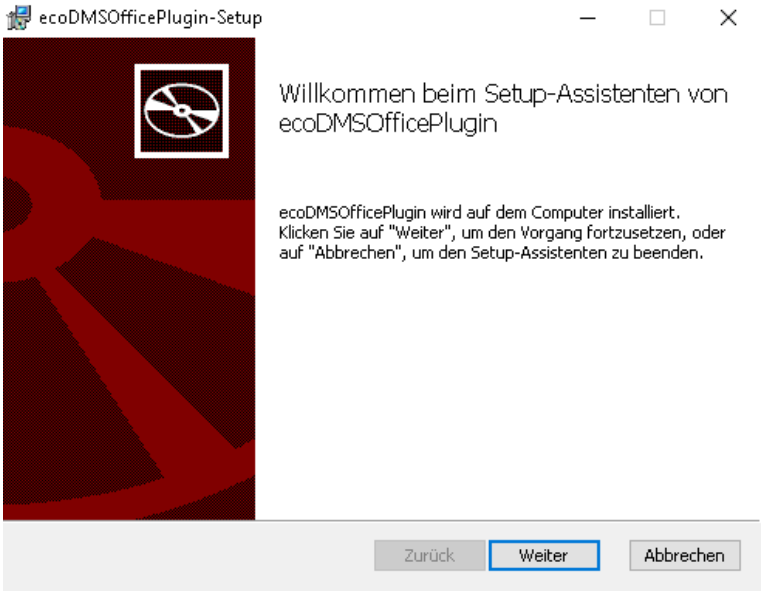

Fig. (similar) 6.4: MS Office Plugin - Start Setup Wizard

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

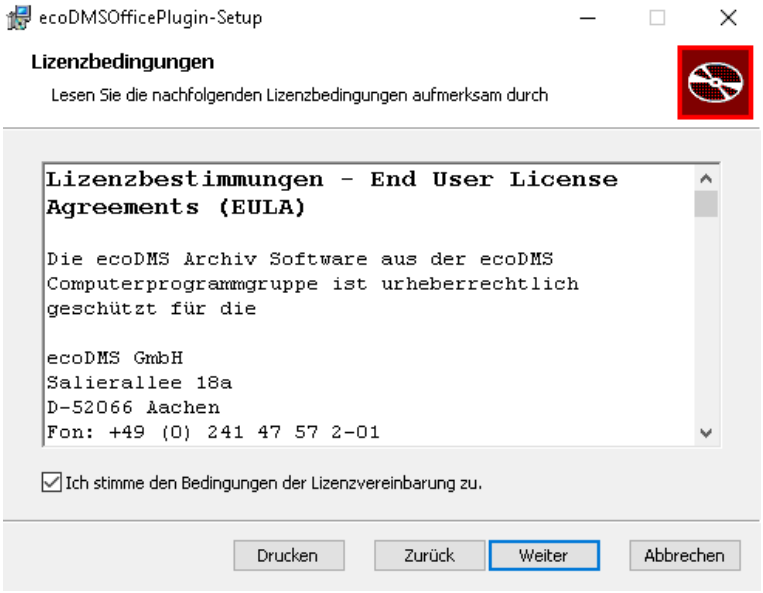

Fig. (similar) 6.5: MS Office Plugin - ecoDMS license Agreement

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

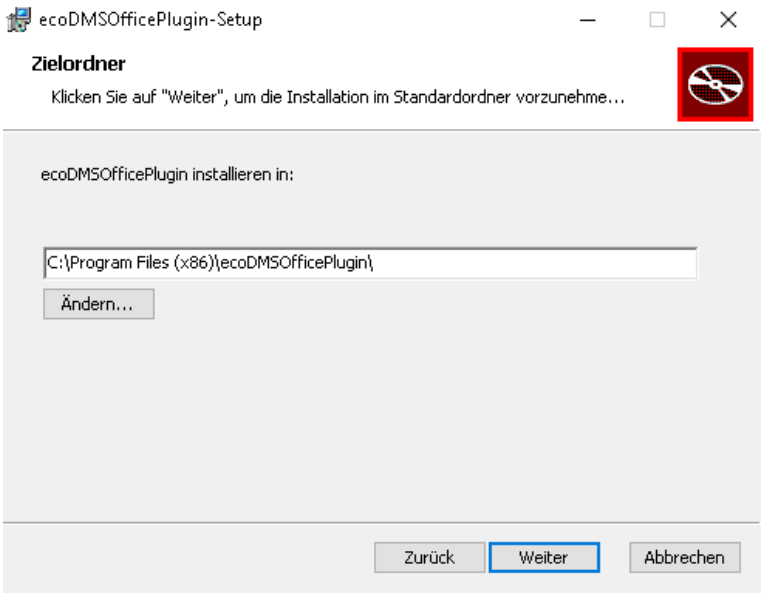

Fig. (similar) 6.6: MS Office Plugin - Installation Destination

11. Click "Install" to start the installation.

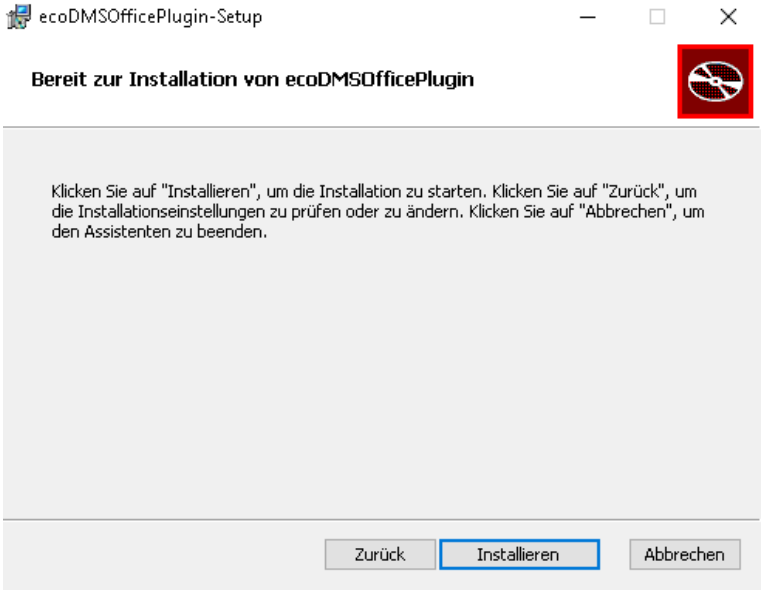

Fig. (similar) 6.7: MS Office Plugin - Start Installation

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

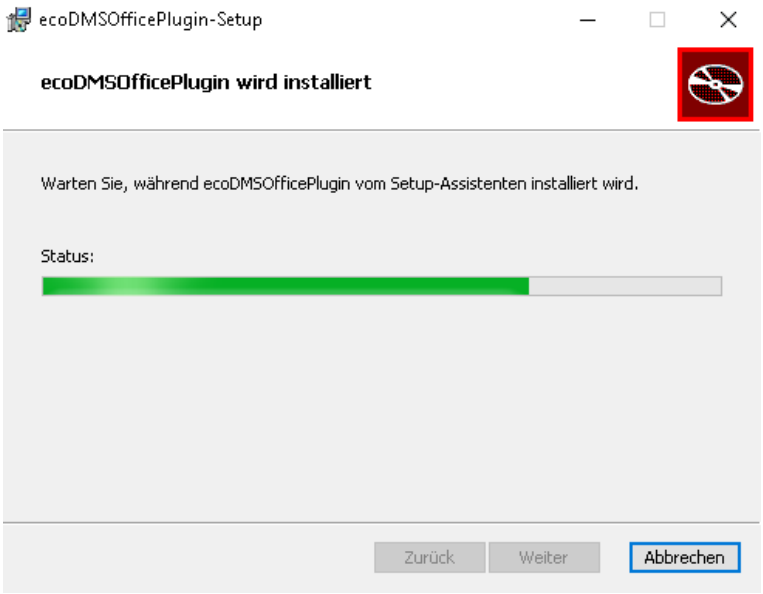

Fig. (similar) 6.8: MS Office Plugin - Installation

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

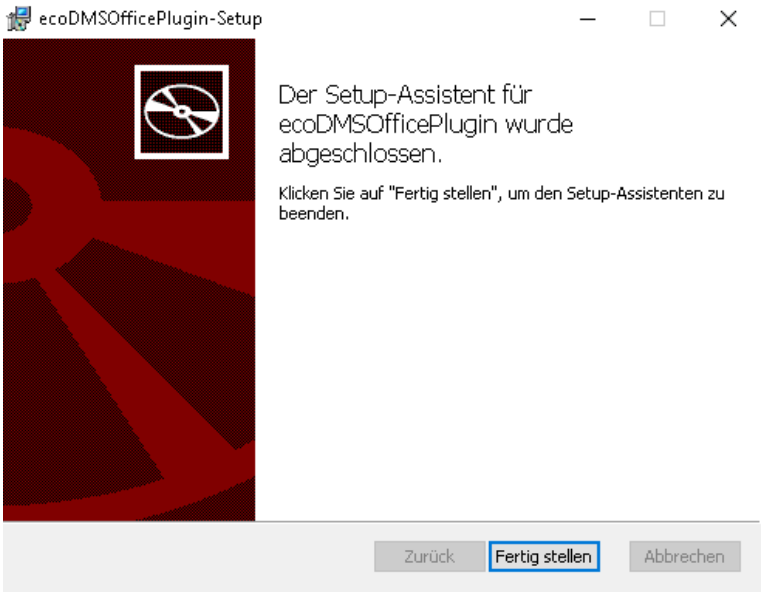

Fig. (similar) 6.9: MS Office Plugin - Finish Installation

14. You can restart the MS Office Programs now.

6.1.2 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].

6.1.2.1 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. Tools -> Options

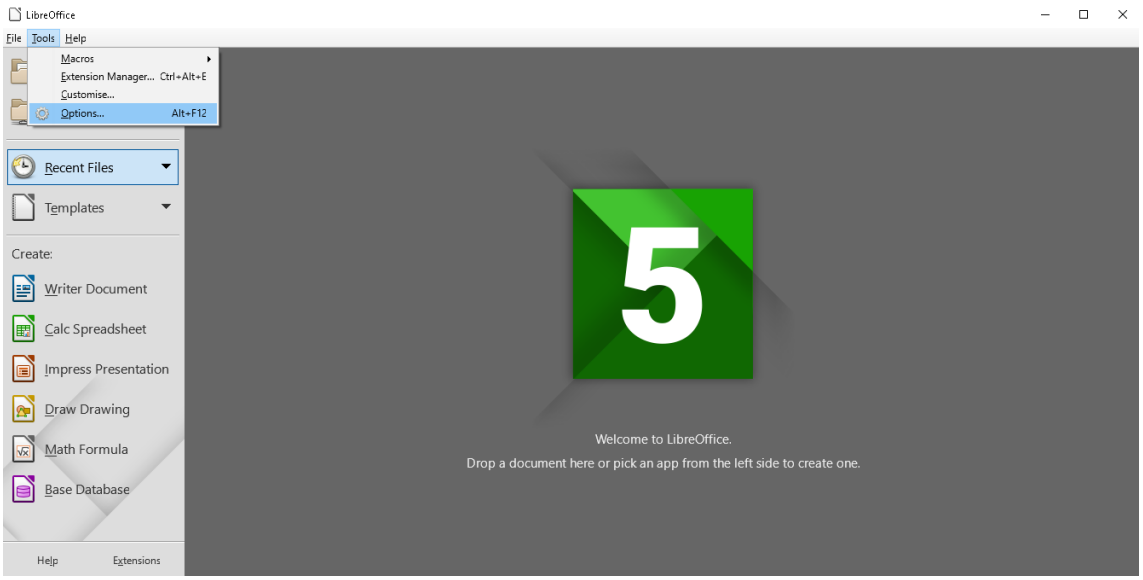

Fig. (similar) 6.10: LibreOffice - Tools - Options

3. LibreOffice -> Advanced
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, license 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".

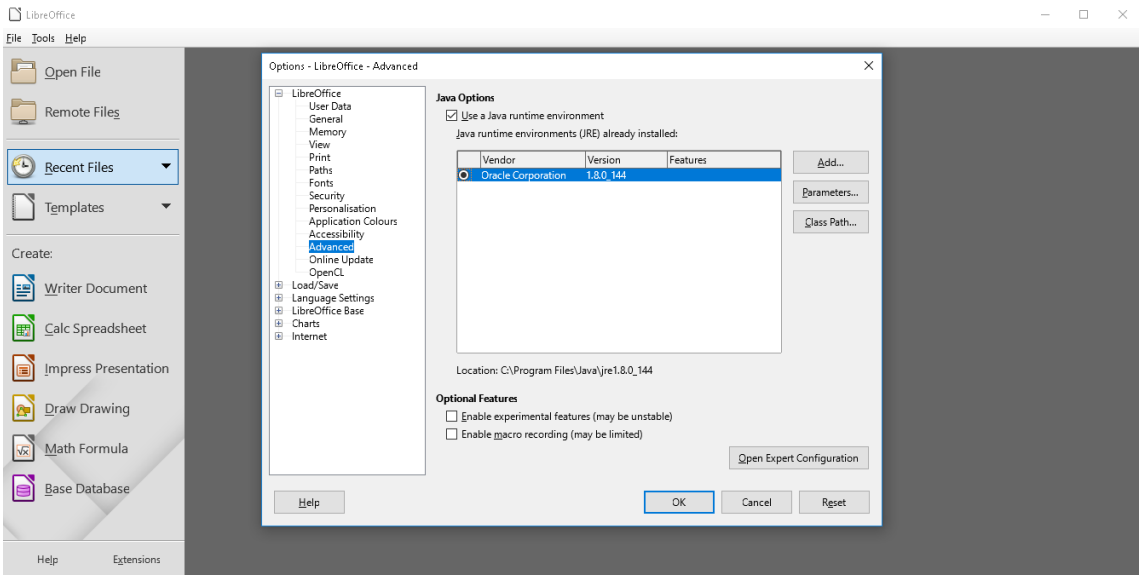

Fig. (similar) 6.11: Enable Java in Office

6.1.2.2 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".

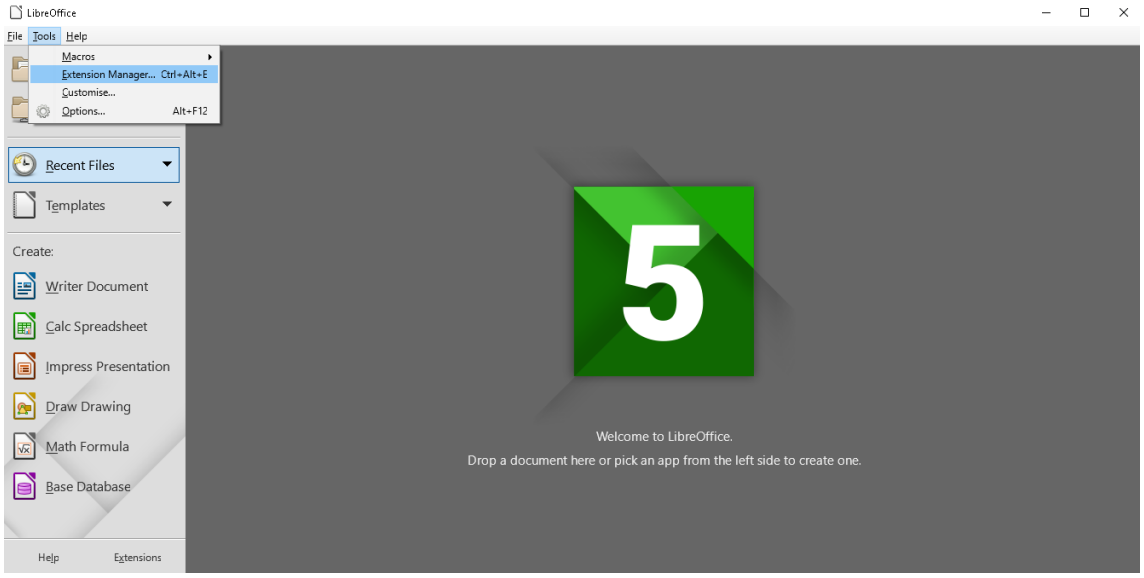

Fig. (similar) 6.12: LibreOffice: Extras -> Extension Manager

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

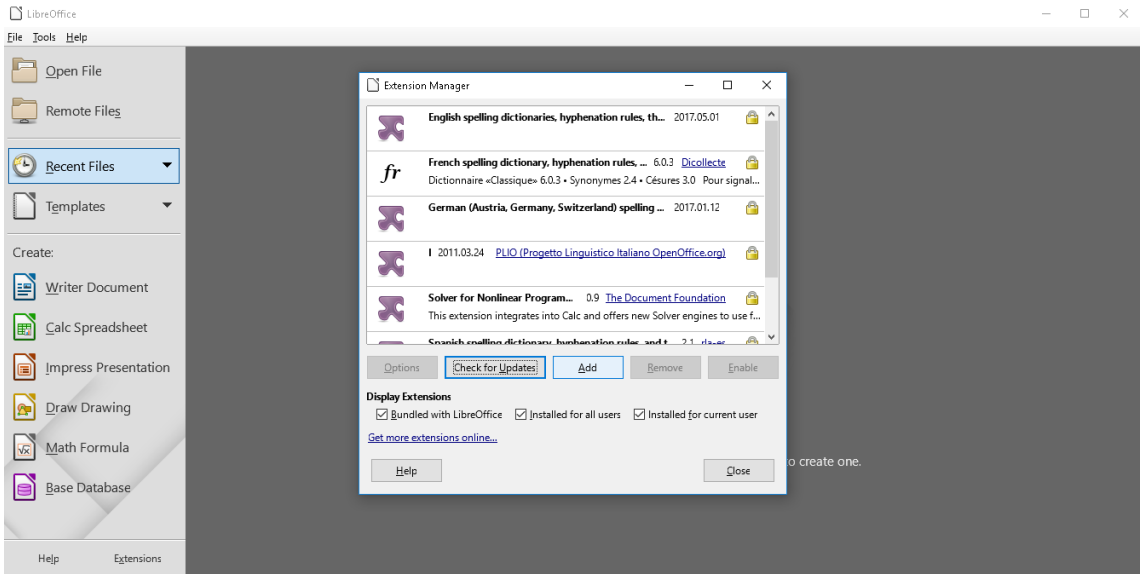

Fig. (similar) 6.13: LibreOffice: Extension Manager

6. Select the "OXT file" for the "ecoDMSAddon" and click "Open".

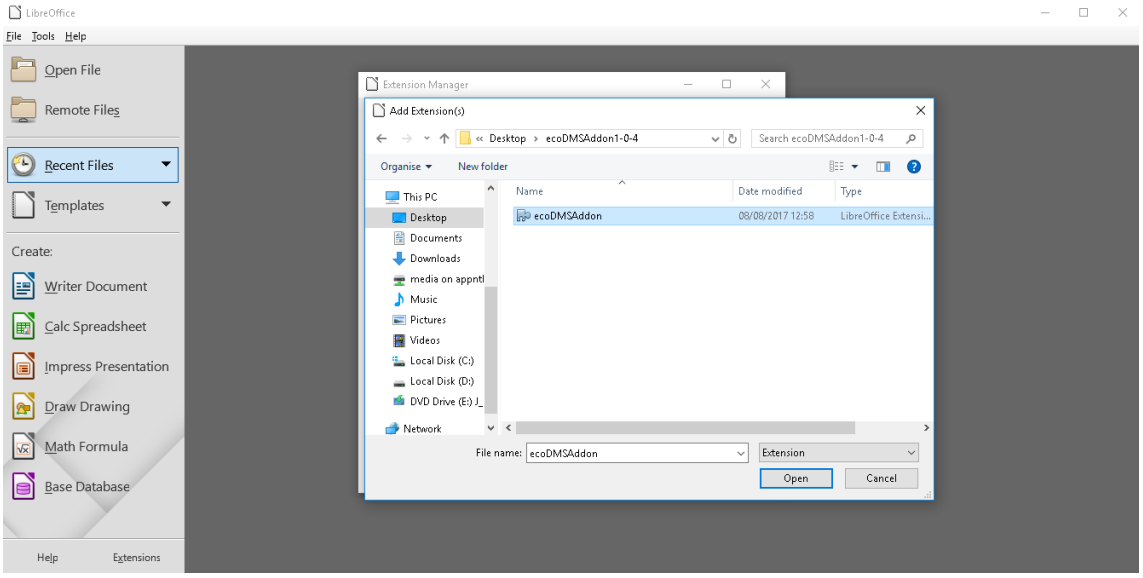

Fig. (similar) 6.14: LibreOffice: Extension Manager - Select File

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

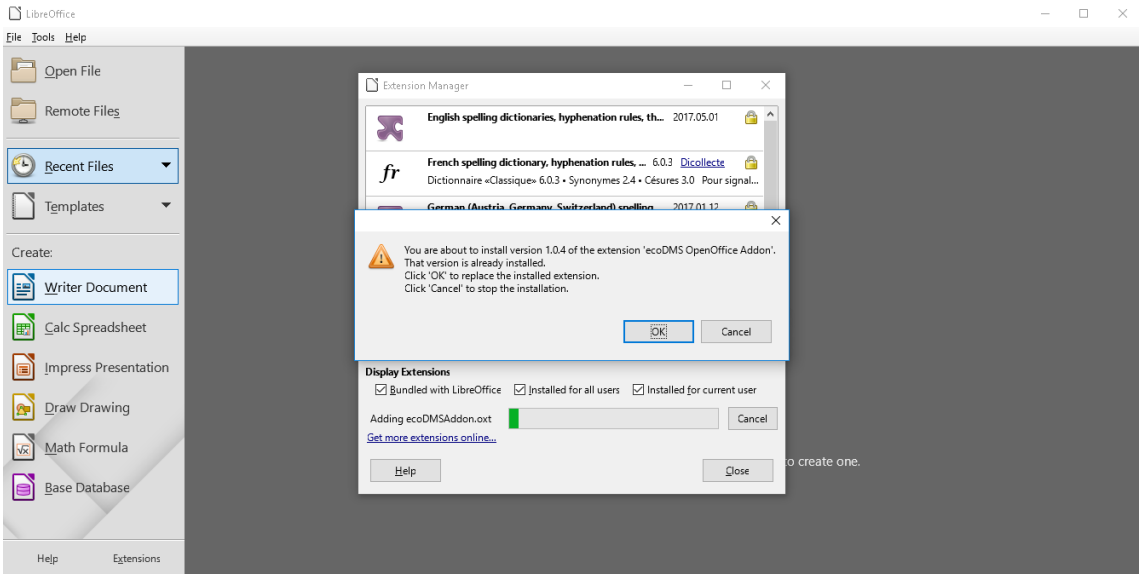

Fig. (similar) 6.15: Confirmation Prompt: User Environment

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

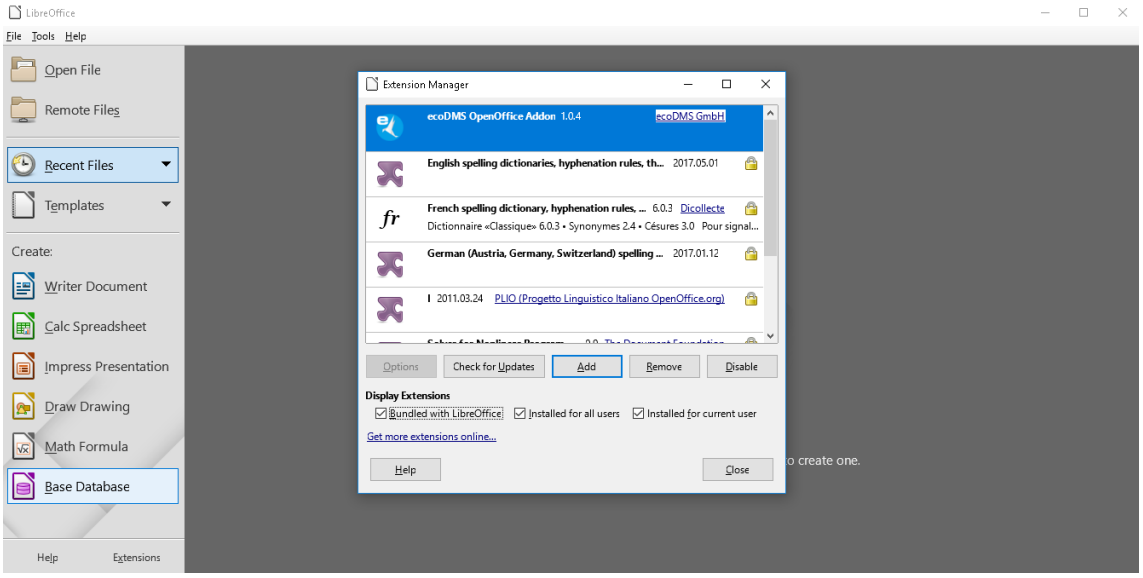

Fig. (similar) 6.16: LibreOffice: Installation Complete

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".

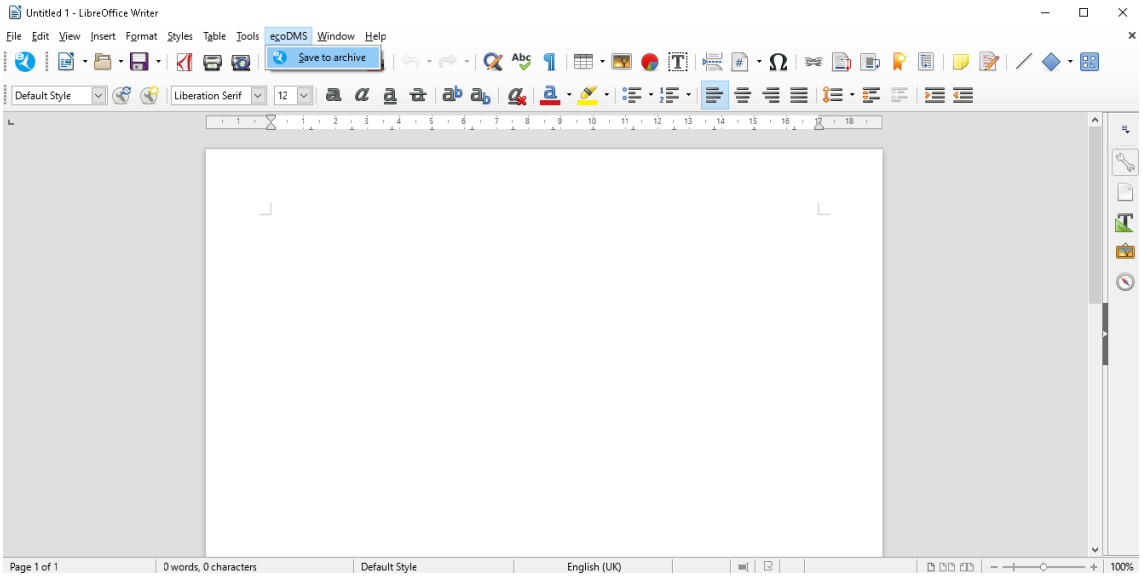

Fig. (similar) 6.17: LibreOffice: ecoDMS Addon (here: Writer)

6.1.3 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.
   a) Please also note: The Thunderbird add-on requires the latest version of the ecoDMS Printer.
2. If this is a ZIP-file, unzip it first.
3. Start Thunderbird.

4. Click "Menu - Tools - Addons".

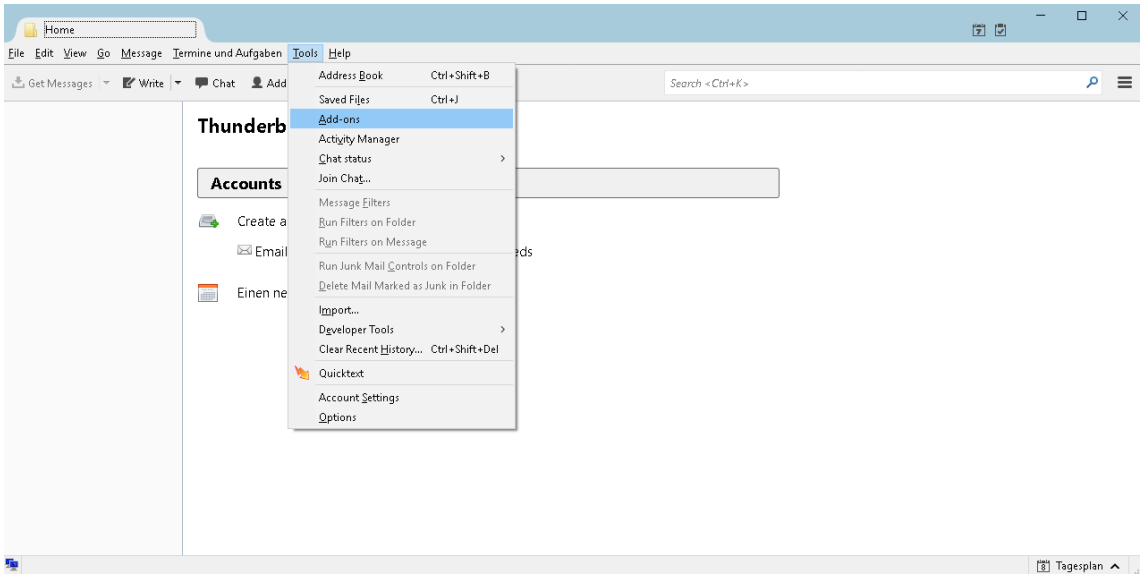

Fig. (similar) 6.18: Thunderbird: Tools -> Add-ons

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

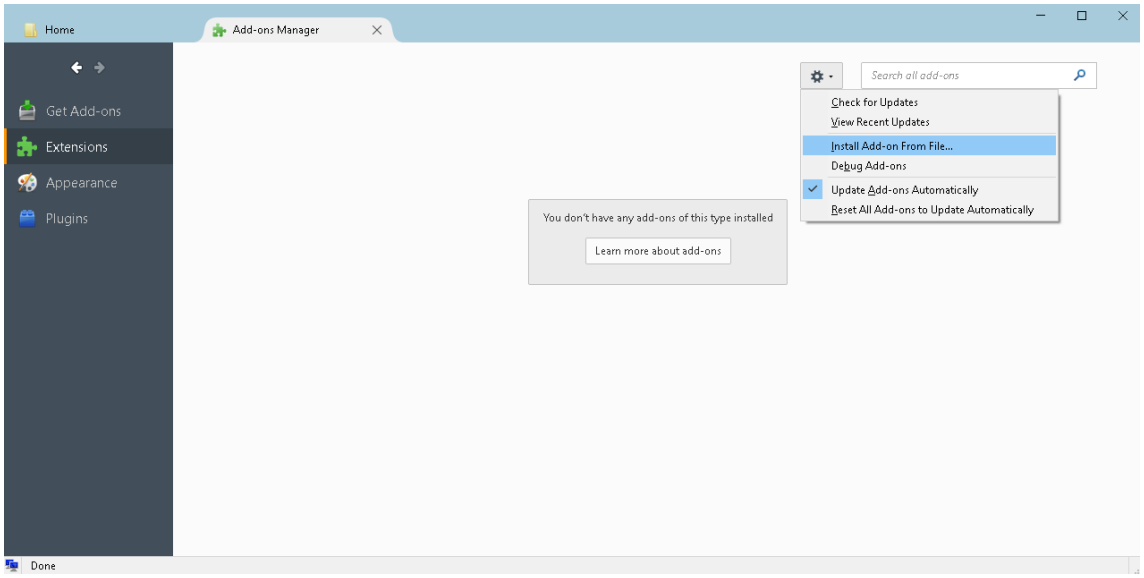

Fig. (similar) 6.19: Thunderbird: Install Addon from File

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

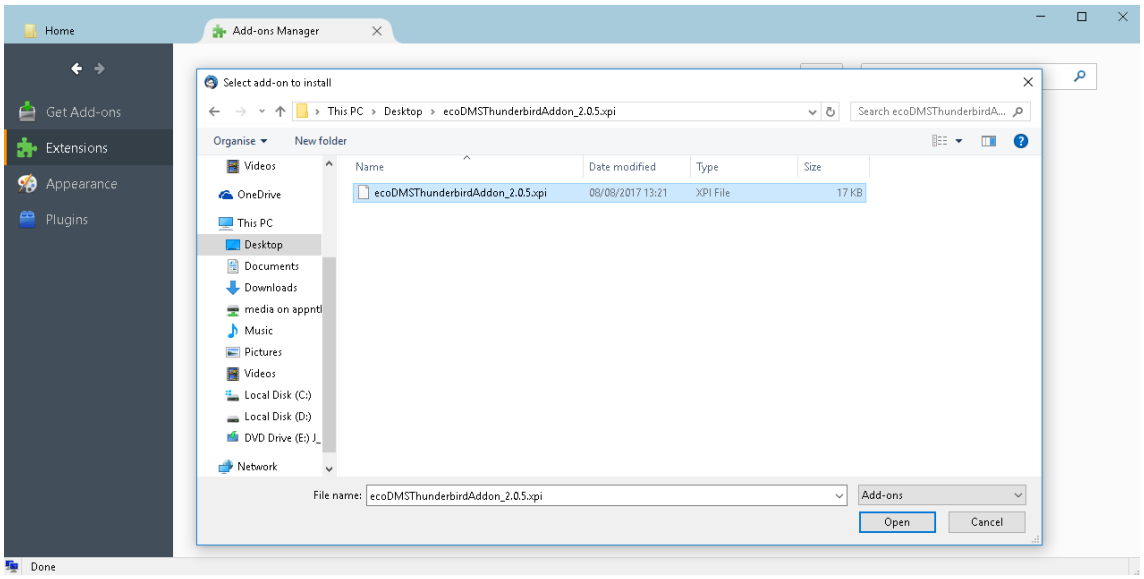

Fig. (similar) 6.20: Thunderbird: Select Addon

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

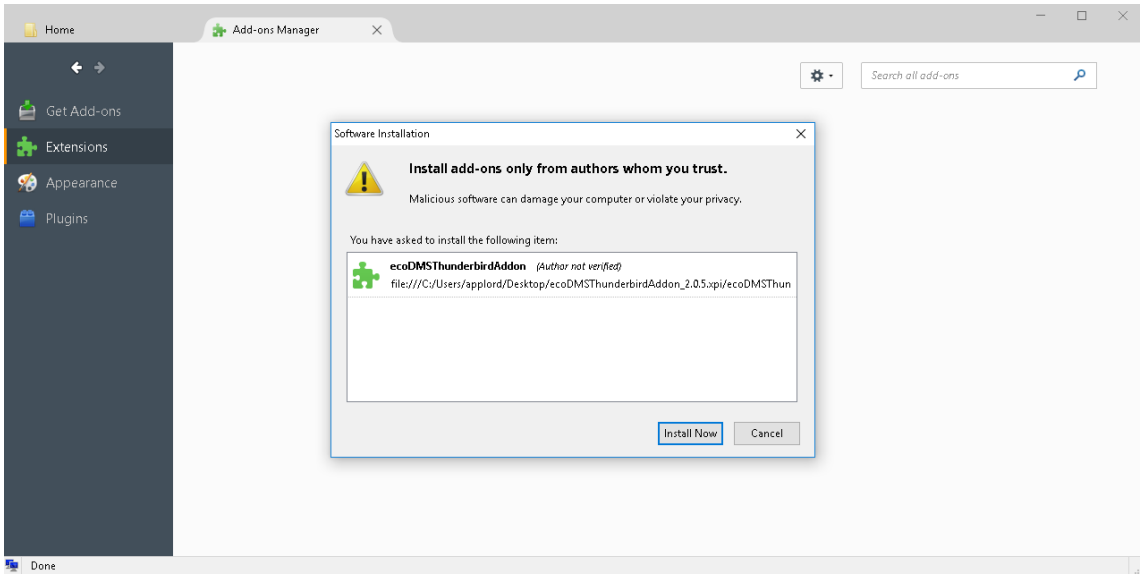

Fig. (similar) 6.21: Thunderbird: Confirmation Prompt

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

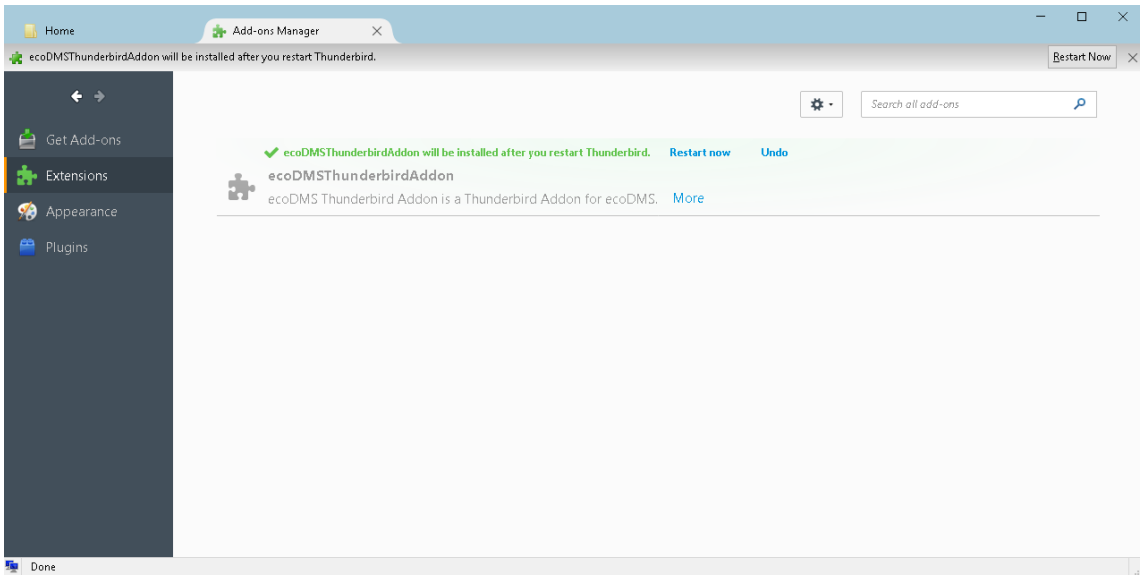

Fig. (similar) 6.22: Thunderbird: Restart

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

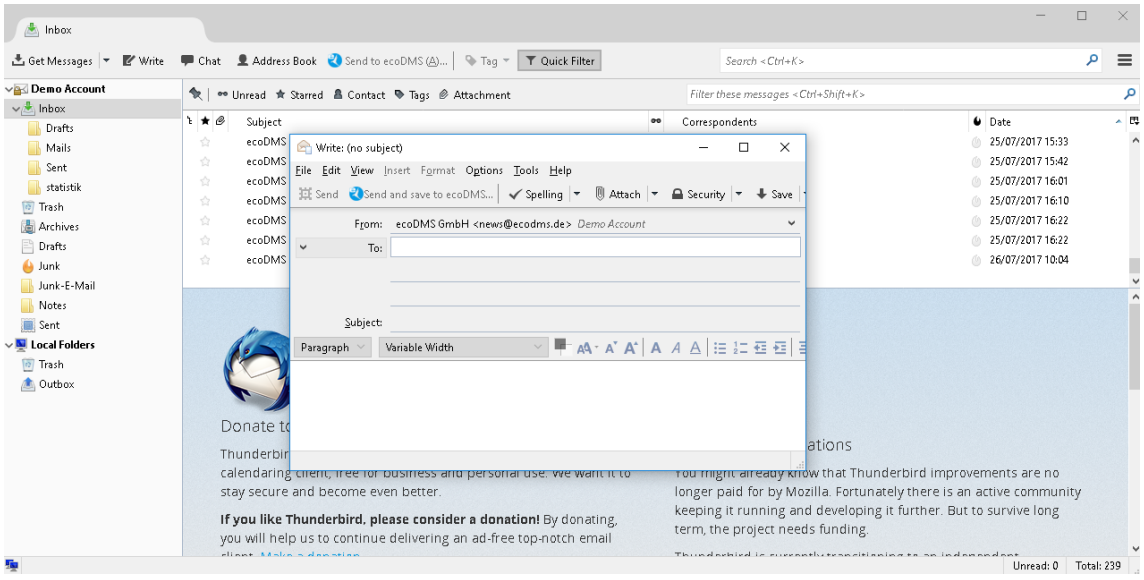

Fig. (similar) 6.23: Thunderbird: ecoDMS Addon in the mail client

6.2 Uninstall

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

6.2.1 Microsoft Office Plugin

The following explains the uninstall process of the ecoDMS MS Office Plugin under Windows [2].

1. Exit all Office applications.
2. Select Programs -> "ecoDMS Office Plugin" in the control panel.

3. Use the "Uninstall" function.
4. During the Uninstall, the firewall might inquire whether the application is allowed to access the network. Confirm with "Yes".

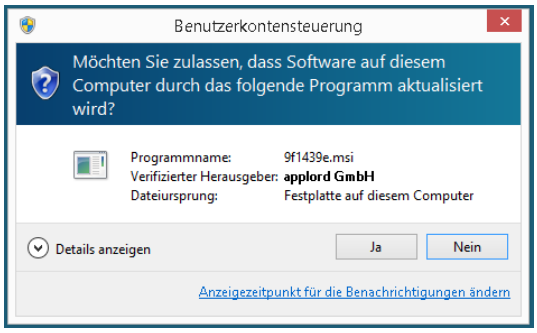

Fig. (similar) 6.24: User Account Control – MS Office Plugin

5. The Uninstall is prepared and than executed. This operation may take a while.

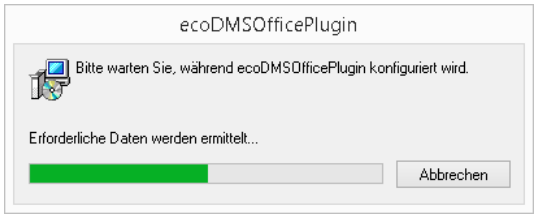

Fig. (similar) 6.25: MS Office Plugin - Uninstall: Preparation & Execution

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

6.2.2 Libre- & OpenOffice Addon

The following explains the uninstall process of the ecoDMS LibreOffice and OpenOffice Addon under Windows [2].

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

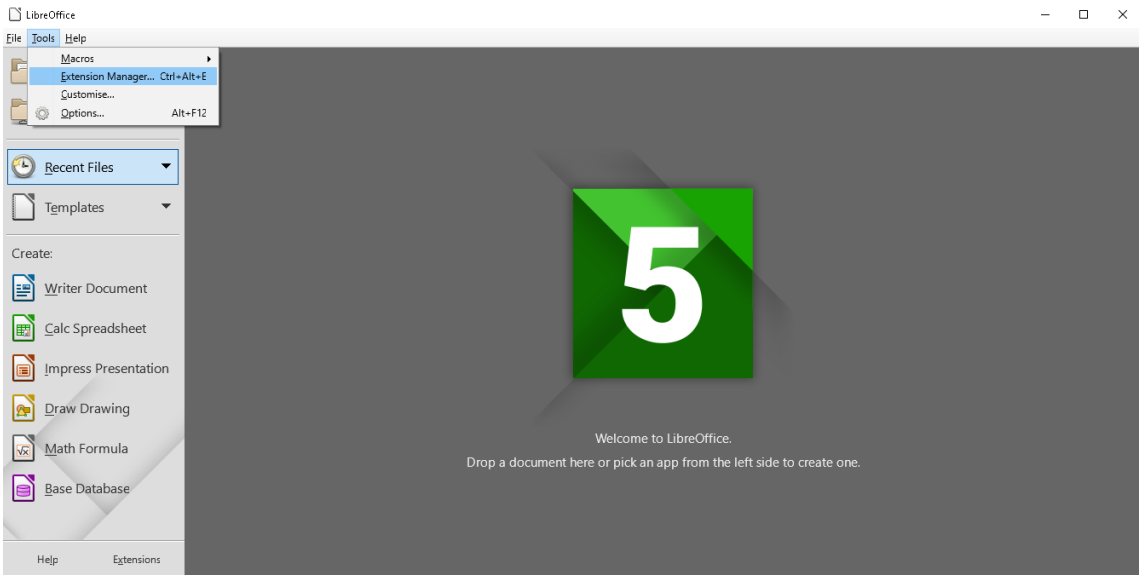

Fig. (similar) 6.26: LibreOffice: Extras -> Extension Manager

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

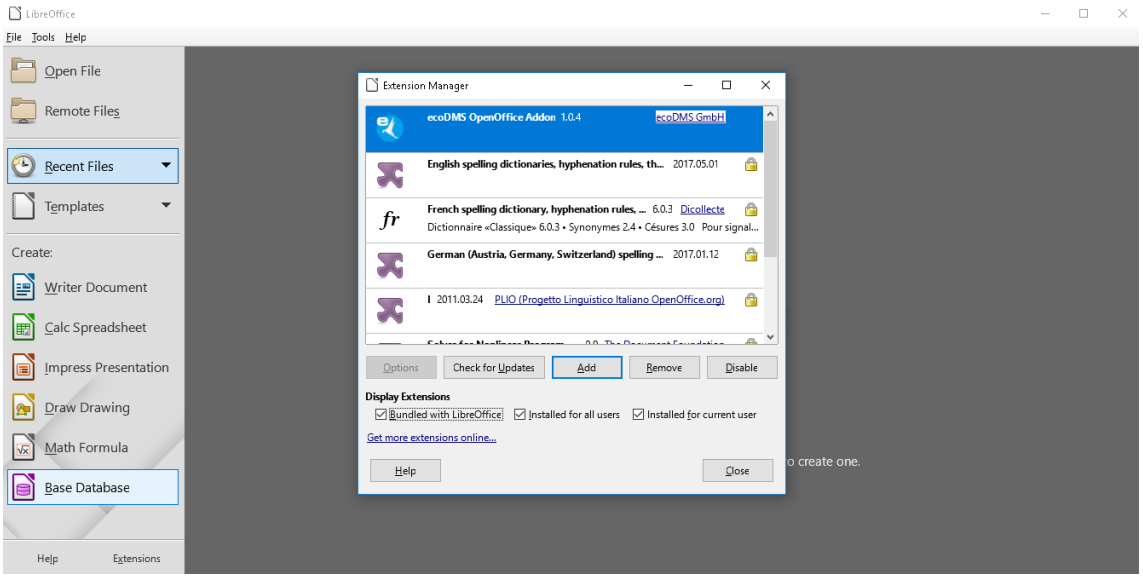

Fig. (similar) 6.27: LibreOffice: Extension Manager

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

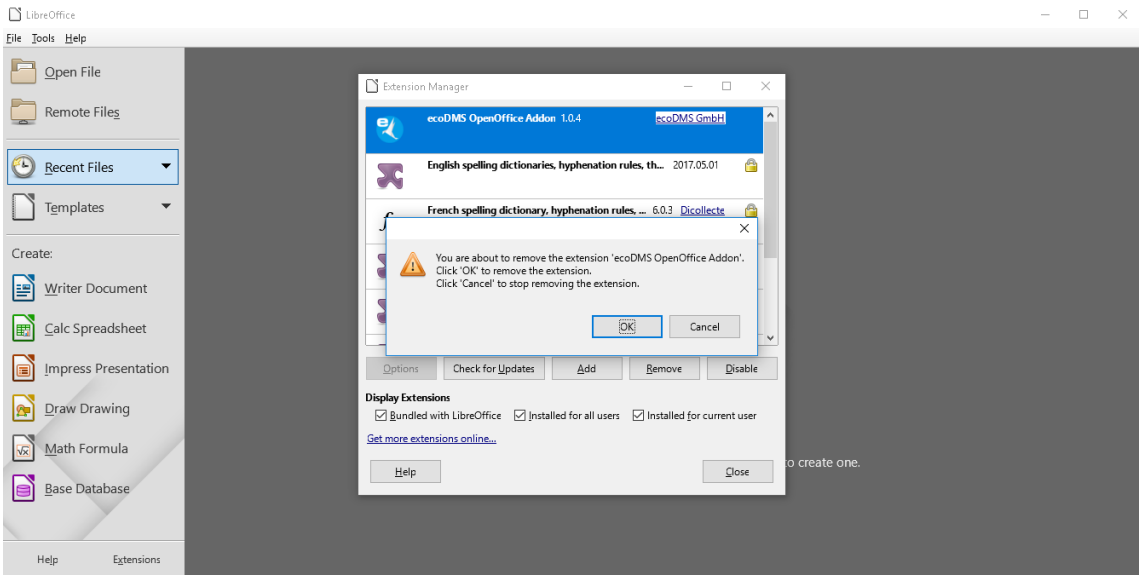

Fig. (similar) 6.28: Confirmation Prompt for Uninstall

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

6.2.3 Thunderbird Addon

The following explains the uninstall process of the ecoDMS Thunderbird Addon under Windows [2].

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

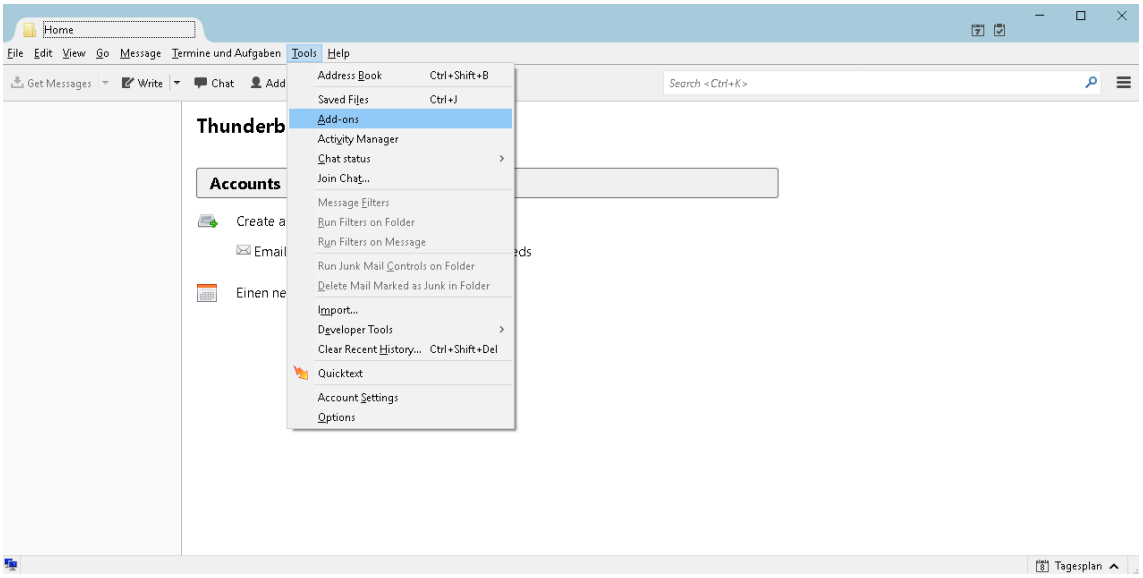

Fig. (similar) 6.29: Thunderbird: Extras -> Addons

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

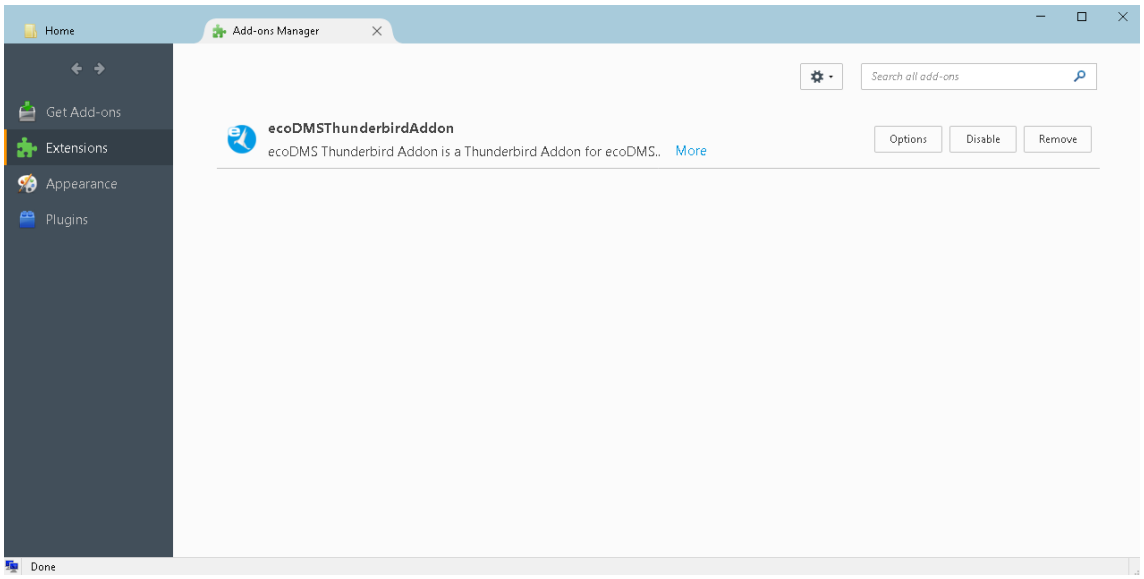

Fig. (similar) 6.30: Thunderbird: Uninstall Addon

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

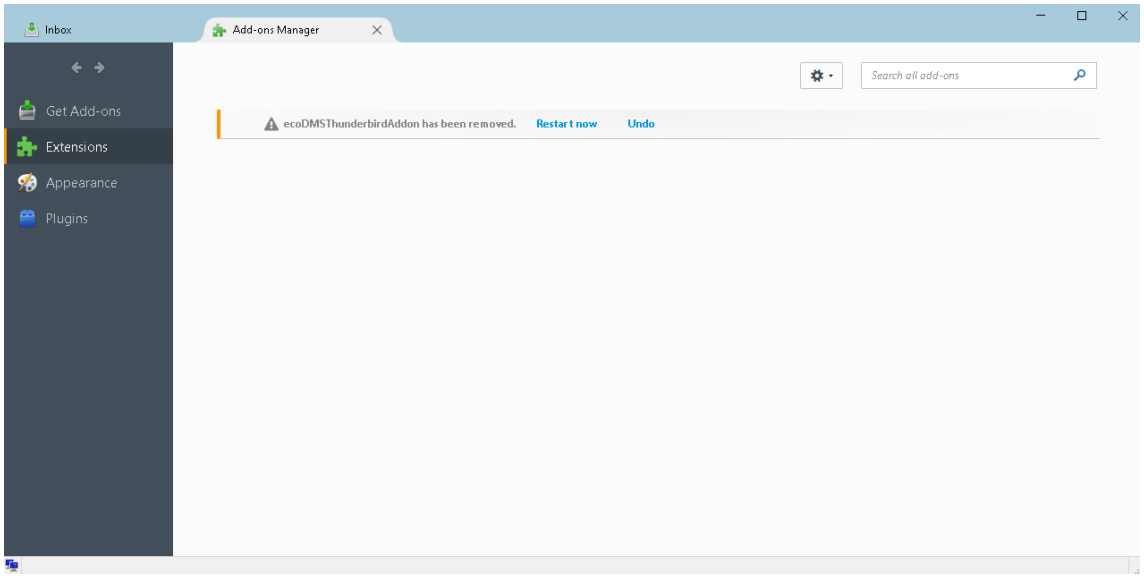

Fig. (similar) 6.31: Thunderbird: Restart

Important Information for Chapter 6

[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 client in different languages. The view of the classification attributes and messages depends on the language you have selected for the ecoDMS server component.*

7 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.