MANUAL

ecoDMS Version 16.09 (eleanor)

Imprint

ecoDMS Version:	16.09 (eleanor)
Manual Date:	5th October 2020
Type:	Features
Language:	EN

Author / Originator:	ecoDMS GmbH
©2020	Dresdener Straße 1
	52068 Aachen
	Germany
Website:	www.ecodms.de
Email:	info@ecodms.de
Phone:	0049 241 47572 01
Company's registered office:	Aachen
Registry court:	Amtsgericht Aachen 19201
Management:	Dipl.-Betrw. Michael Schmitz
	Helge Lühmann

Important Information

Contents

1 Quick Start

With ecoDMS you can store digital and paper documents in a central, digital archive. This chapter contains a short introduction to working with ecoDMS.

1.1 Install ecoDMS

– To start, install all necessary ecoDMS components. The basic system elements are the ecoDMS Server, the ecoDMS Client incl. Inbox and Connection Manager and the virtual PDF/A Printer. In addition, there are optional plugins, Addons and mobile apps.

– 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 ecoDMS Server is installed once on a central computer, a server or an NAS. You can then install the ecoDMS Client and plugins on any number of other computers. From each workstation, the connection to the ecoDMS Server is made via the Connection Manager. Of course the ecoDMS Server and other components can also be installed together as a solution for a single workstation.

– When first installing ecoDMS Archive under Windows, business customers and private individuals can automatically install default settings and use the software immediately. The default configuration contains example settings. Of course these settings can be modified and/or performed manually. The default configuration does not include any documents. The configuration does contain a first selection of available document types and classification attributes. Customers who wish to install the default settings at a later date can download the necessary backup file in the download area of the ecoDMS website.
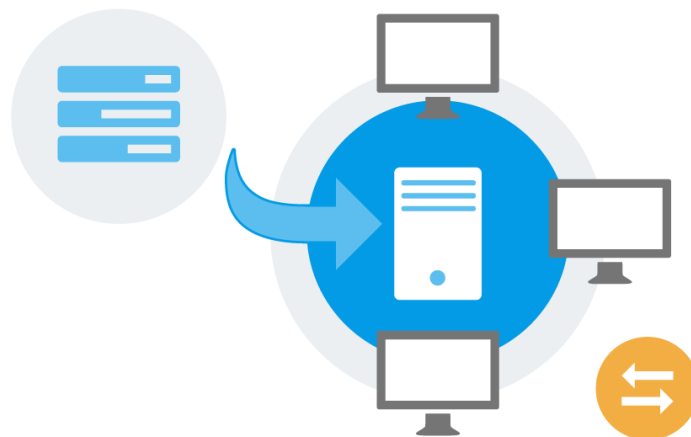
Fig. (similar) 1.1: Quick Start - Install ecoDMS

1.2 Login & Connection

The connection manager is installed automatically with the ecoDMS client. It establishes the connection with the ecoDMS server. In order to work with the ecoDMS Archive, you must register via the connection manager. To do so, you can, for example, use the ecoDMS default user. The default user is created automatically when you first install ecoDMS. The default user can scan, archive and classify documents, use the version management function and has access to the document history. Moreover, the default user has admin permissions and thus has the permission to make system settings and add

1. Quick Start

ecoDMS Version 16.09 (eleanor)   Manual | EN

more users.

The login credentials for the default user (if the password has not been changed) are:

- – User name: ecodms

- – Password: ecodms

Change your password as soon as possible for security reasons. For more information and default users, refer to the chapter "Login Credentials" in the ecoDMS manual.

If you use the AllinOneInstaller to install the ecoDMS Server and ecoDMS Client on a local computer, the connection manager already provides a local profile with the default user. If not, you can easily create a profile yourself. The following figure shows an example of how to fill in the profile on a local installation (single workstation) for the connection manager.

Fig. (similar) 1.2: Connection Manager - Example of how to fill in the profile on a local installation (single workstation)

Fig. (similar) 1.3: Connection Manager - Example profile on a local installation

1.3 System Setup

You can setup ecoDMS according to your requirements.

- If several users are working with the system, you assign an account for each user with the respective permissions in the User and Group Management dialogue box.

- Via the Settings dialogue box, you as an administrator can set the necessary folder structures, document types and much more.

- When using an archiving software, the familiar folder structure changes. Often customer folders, for example, are created in the file system with the associated sub folders invoices, offers, contracts, etc. The previous subfolders are now saved in ecoDMS as document types.

- During classification the folder and the document type are entered together with other archiving information. This immensely simplifies the document search and allows the documents to be displayed and filtered more precisely and clearly.

- The classification information and the recognised full text information enable a user-friendly and quick document search. We therefore recommend you create a flat and simple structure.

Fig. (similar) 1.4: Quick Start - Configuration

1.4 Scan & Archive Documents

After you have setup ecoDMS, you can start archiving your documents. ecoDMS offers several options for saving documents.

- Archiving by dragging and dropping the documents directly into the ecoDMS Client.

- Archiving with the archiving function in the ecoDMS Client.

- Scanning and archiving documents (Inbox).

- Archiving via Side Panel.

- Archiving documents via the virtual PDF/A Printer.

- Archiving files via Plugins, Addons.

- Archiving files via Mobile Apps from your Smartphone or Tablet.

- Archiving files via the web interface.

1.4.1 Scan Process

If you want to archive your incoming mail (paper documents), you can easily do this via the ecoDMS Inbox. Here you can retrieve, edit and classify the scanned PDF and TIFF files. After archiving, the authorised users can see the documents in ecoDMS Archive. Here you can read about the first steps to familiarise yourself more easily with the programme.

1. Configure your scanner. We recommend you use the scaninput folder on the ecoDMS Server. Alternatively, you can also scan your documents via the TWAIN/WIA/SANE interface. The device must have PDF and/or TIFF as scan formats. It is best to scan in the documents in black and white (black-white= 1-bit colour depth) or in shades of grey with 200-300 DPI.

2. In order to scan a whole document batch, we recommend you use ecoDMS separator pages. Place such a separator page behind each document before you scan it. ecoDMS then automatically separates the documents into individual files. You can download free separator pages in the download area at ecodms.de.

3. After scanning, the scanned documents are retrieved via ecoDMS Inbox and prepared for archiving. As soon as the files are classified and archived, they become available for authorised users in ecoDMS Archive.

4. Via the classification you can assign the virtual folder in ecoDMS, the document type, the status, the permissions and many other information (meta data) for each document. With this information, and in addition to the full text search, the documents can be retrieved and then saved together with further details. The classification can be done either manually by the user or automatically through classification templates.

5. Now you can archive the file. All archived text documents automatically undergo background full-text indexing and are available in ecoDMS Archive in the original scan format and also in the long-term archiving format PDF/A.
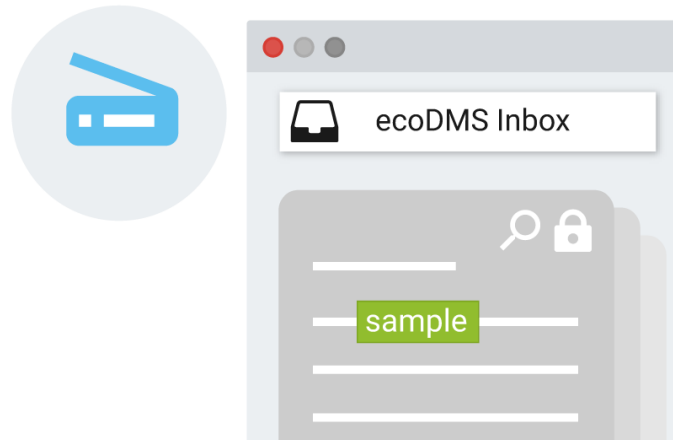
Fig. (similar) 1.5: Quick Start - Scan Documents

1.4.2 Archive & Classify Digital Files

– You can save virtually any file format in the ecoDMS Archive. You can drag and drop documents, which are already saved on your computer, into the archive.

– ecoDMS carries out full-text recognition automatically in the background for readable files.

– Depending on the document, you can classify either manually or automatically with the template designer. As an option, you can also work with mass classification. This allows you to classify any number of documents simultaneously with the same information.

– With the right classification attributes, you can assign the document type, the customer folder, the date, the responsibilities and much more information to the document, all of which can be edited at any time. Apart from the full text search, you can use these attributes to create exact filters to search for documents and to access the required data and information quickly.

Fig. (similar) 1.6: Quick Start - Archive Digital Documents

2 Desktop Settings

You can configure the interface of your programme flexibly for each workplace.

2.1 Save Desktop Settings

You can place and move the windows according to your own wishes. You can save these settings and load them when you need them. Complete the following steps [1, 2]:

1. Click "View - Save Desktop Settings"

2. Select the storage location for your "Desktop Settings".

3. Confirm your selection with "OK".

2.2 Load Desktop Settings

You can save your ecoDMS Desktop Settings and load them into the ecoDMS Client when you need them. You can load a saved desktop as follows [1, 2]:

1. Click "View - Load Desktop Settings".

2. Select the saved file on your file system.

3. Confirm your selection with "OK".

2.3 Reset Desktop

You can reset the desktop to the default view (view after installation) if necessary [1, 2].

1. In the menu click "View - Reset Desktop".

2. Confirm then the message in the dialogue box with "OK".
    a) The desktop will now be reset to the initial state.

2.4 Reload Desktop

Reloading Desktop can be necessary if you made settings / changes within the folder structure, document types, etc. To perform this function, you have the following options [2]

1. Click the "Reload Desktop" icon in the toolbar **or**

2. In the menu click "View - Reload Desktop".

The desktop is reloaded. This process my take some time.

Information: The toolbar icon blinks if the system identifies changes.

Fig. (similar) 2.1: Icons - Reload Desktop

2.5 Arrange Windows in Tabs

You can place and move the windows according to your own wishes. To arrange the windows in tabs / above the other, complete the following steps [1, 2]:

1. Use the mouse to grab the window by the title bar.

2. Drag the window onto the other window.

3. Release the mouse button.

2.6 Tile Windows Vertically

You can place and move the windows according to your own wishes. To arrange the windows vertically, complete the following steps [1, 2]:

1. Use the mouse to grab the window by the title bar.

2. Drag the window above the edge of the other window.

3. Release the mouse button.

2.7 Tile Windows Horizontally

You can place and move the windows according to your own wishes. To arrange the windows horizontally, complete the following steps [1, 2]:

1. Use the mouse to grab the window by the title bar.

2. Drag the window to the right position with the mouse.

3. Release the mouse button.

2.8 Undock Windows

You can place and move the windows according to your own wishes. To undock windows, complete the following steps [1, 2]:

1. Click the "Undock Button" in the title bar of the corresponding window.

2. Now move the window to any position.

3. Double-click the title bar of the window to move it back to the original position.

2.9 Hide Windows

You can hide not required windows. Complete the following steps [1, 2]:

1. Right-click the toolbar or menu bar.

2. Remove the marker (cross) to hide a window.

Alternatively, you can close the windows by clicking the "Close Icon" in the title bar of the window.

2.10 Show Windows

Hided windows can be displayed when needed. Complete the following steps [1, 2]:

1. Right-click the toolbar or menu bar.

2. Set the marker (cross) to show a window.

2.11 Minimise / Maximise / Restore Client

You can minimise, maximise and restore the client by using the default icons of your operating system. Normally you can find the icons in the title bar of the application.

2.12 Toolbar Settings

You can set up the toolbar in ecoDMS Client according to your own wishes. To create your own toolbar, complete the following steps [1, 2].

2.12.1 Open Toolbar Management

In order to set up and manage the toolbars, you must first open the Toolbars management. Complete the following steps:

1. In the ecoDMS menu click "Options - Configure Toolbars".

2. The dialogue box "Configure Toolbars" opens.
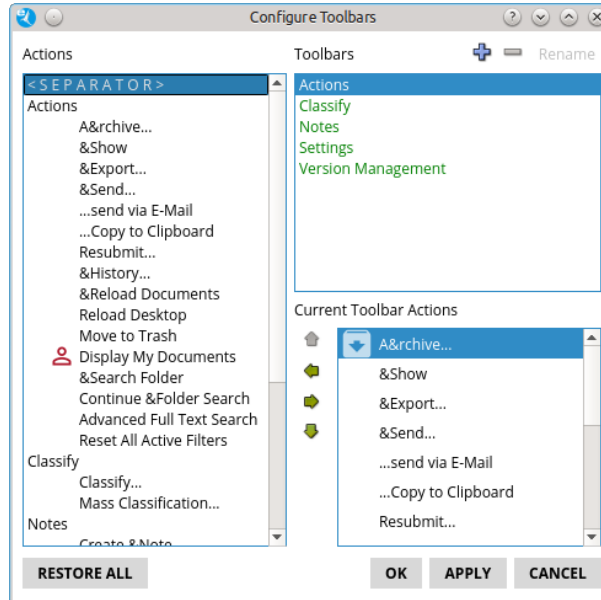
Fig. (similar) 2.2: Toolbar Management

2.12.2 Create New Toolbar

To create a new toolbar:

1. In the Toolbars area, click the + Icon.

2. The client creates a toolbar with the name "Custom Toolbar".

3. Overwrite this name with your description.

4. Then press "Enter".

2.12.3 Delete Toolbar

You can delete the toolbars you have created.

1. Select the toolbar you want to delete in the Toolbars area.

2. Now click the - icon.

3. You have deleted the toolbar.

2.12.4 Add Toolbar Actions / Icons

You can add more actions / icons to the toolbars:

1. Select the toolbar you want to edit in the Toolbars area.

2. Select the icons in the "Actions" area. Click the Right Arrow to add the selected icons to your toolbar.

3. You can repeat this process to add more icons.

2.12.5 Remove Toolbar Actions / Icons

You can delete actions / icons in custom toolbars:

1. Select the toolbar you want to edit in the Toolbars area.

2. In the Assigned Toolbar Actions area, select the icon you want to delete. Now click the Left Arrow to delete the selected icons from your toolbar.

3. You can repeat this process to delete more icons.

2.12.6 Change the Order of Toolbar Icons/Actions

You can change the order of the icons in the toolbar as you like:

1. Select the toolbar you want to edit in the "Toolbars" area.

2. In the "Assigned Toolbar Actions" area, select the icon you want to move.
   a) Click the "Up Arrow" to move the icon upward.
   b) Click the "Down Arrow" to move the icon downward.

2.12.7 Restore All

To restore the toolbars to the default setting, click the "Restore All" button. You have now deleted all new toolbars and changes.

Important Information for Chapter 2

[1] *Please note that these settings refer to the individual workstation and are not stored in the user profile.*

[2] *We recommend a screen resolution of at least 1280 x 1024 px.*

3 Icons

Here you get an overview of all icons and their functions. Click the respective icon to execute the function.

3.1 ecoDMS Archive

	Archive		Show
	Export		Send
	Send Link via E-Mail		Copy link to the Clipboard
	Create Resubmission		Display History
	Reload Documents		Reload Desktop
	Reload Desktop (Notification)		Print
	Move to Trash		Restore Document
	Display All Documents		Display My Documents
	Search Folder		Continue Search (Folder)
	Advanced Full-Text Search		Classify
	Mass Classification		Create New Versioned Document
	Add New Version to Document		Lock Document (Check-Out)
	Unlock Document (Check-In)		Create Note
	Settings		User and Group Management
	Manage Plugins		Reset All Active Filters
	Trash Opened		Trash Closed

3.2 Data Export

	Create New Export		Refresh Export
	Save Export		Delete Export

3.3 Classification

	Classify		Mass Classification
	Add Multiple Classification		Remove Multiple Classification
	Show Templates		Save Template

3.4 Notes

	Create Note		Remove Note
	Format Note		

3.5 Version Management

	Open Version		Export Version
	Add New Version to Document		Finalise Version
	Lock Document (Check-Out)		Unlock Document (Check-In)

3.6 Inbox

	Save Changes		Save Document As...
	Save Document as PDF...		Scan New Document
	Add Page(s) to Document		Copy Text from Document

	Reload Desktop		Zoom Out
	Zoom In		Fit (Zoom)
	Rotate Left		Rotate Right
	Rotate 180 Degrees		Delete Selected Page(s)
	Add Page(s) to Document		Export Selected Page(s)
	Previous Document		Next Document
	Request Scanned Documents		Delete Document from Server
	Split Document		Unlock Document
	Search Matching Classification Template		

4 Log in & Connection Manager

The ecoDMS Server is a client server system and as such forms the basis of the entire system. Here you securely store all data and information in a postgreSQL Database and in Containers.

- The Connection Manager connects to the ecoDMS Server. In order to work with the ecoDMS Archive, you must register via the Connection Manager.

- The Connection Manager is automatically installed with the ecoDMS Client. After the initial installation of the ecoDMS Server, ecoDMS has already created one user. Refer to the chapter "Login Credentials" to find the login credentials for the ecodms user.

- If you use the AllinOneInstaller to install the server and the ecoDMS client on one computer, the profile for the Connection Manager is already created with the information of this user. Otherwise you can easily and quickly create the profile yourself [2].

4.1 Open Connection Manager

There are different options to open the Connection Manager.

1. **Desktop**
   a) If ecoDMS does not display the Connection Manager on the toolbar of the operating system (usually at the bottom right next to the date), you can open it by double-clicking the Connection Manager icon on the desktop.
   b) If the icon is available on the task bar, you can open the Connection Manager by double-clicking the "Desktop" icon.

2. **Programme Manager**
   a) If ecoDMS does not display the Connection Manager on the toolbar of the operating system (usually at the bottom right next to the date), you can open it through the programme manager.
      i. The Connection Manager icon displays.
   b) Right-click the Connection Manager icon on the toolbar and then click "Profiles". The Connection Manager interface displays.

3. **Operating System Toolbar**
   a) Right-click the Connection Manager icon on the toolbar and then click "Profiles". The Connection Manager interface displays.

Fig. (similar) 4.1: Connection Manager - Desktop Icon
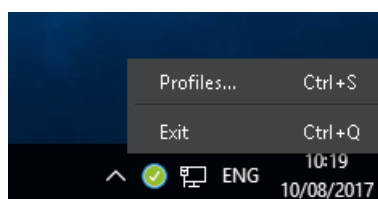
Fig. (similar) 4.2: Connection Manager - Right-click
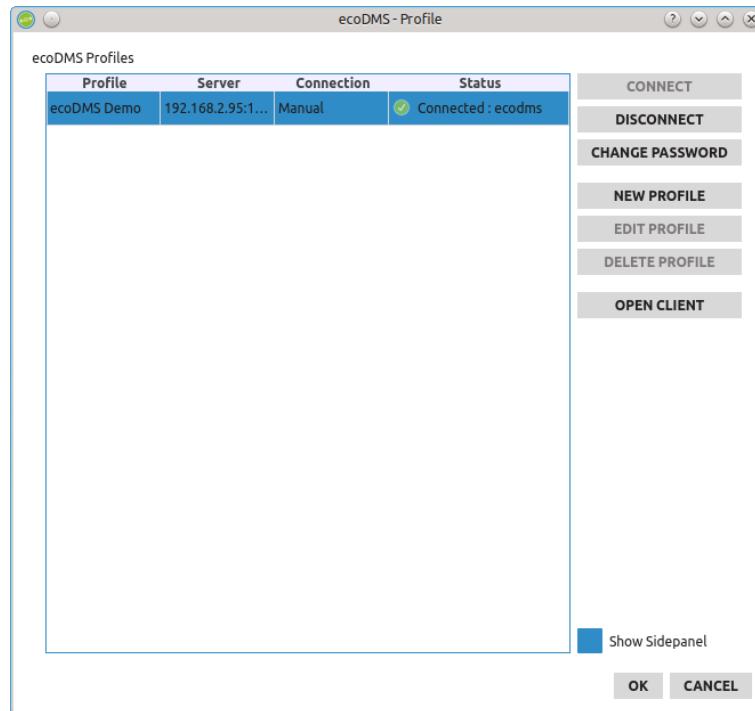
Fig. (similar) 4.3: Connection Manager - ecoDMS Profile Management

4.2 Exit 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:

- Right-click the Connection Manager icon in the toolbar of your operating system.

- 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.
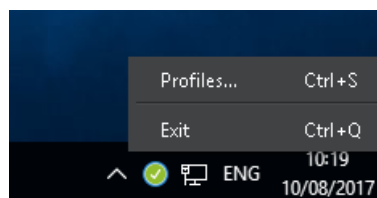
Fig. (similar) 4.4: Connection Manager - Exit

4.3 Profile Icons Descriptions

The appearance of the Connection Manager icon in the toolbar of the operating system gives information about the status of the connection to the ecoDMS Server. Here you can read a description of the status.

Fig. (similar) 4.5: Connection Manager - No Connection

Fig. (similar) 4.6: Connection Manager - Establishing Connection

Fig. (similar) 4.7: Connection Manager - Connection Established

4.4 Client-Server Communication

The ecoDMS server and its clients communicate via TLS encryption.

4.5 Access from Outside

In order to access your **ecoDMS Archive** from outside,

- you must activate the ecoDMS Server port accordingly.

- In the case of a firewall, the access to port 17001 must be approved in a default installation of ecoDMS.

- Alternatively, you can allow access via VPN connection or use the mobile app for Android tablets and mobile phones.

If you want to access via the **web interface of ecoDMS** from outside, please note the following:

- For remote access via the Web Client, it does not suffice to activate the ecoDMS web and mobile access. This is only possible for the mobile app.

- If the web access is active, you can use it internally or within the network. Of course, it is also possible to access the system from outside via the Web Client. This, however, requires customer-specific settings.

In each case the server must be made accessible from outside. Such access, however, is entirely independent from the ecoDMS system and can pose a certain security risk. This is why we recommend that any operations of this kind are carried out by a specialist.

4.6 Create Profiles and Login

In order to work with the ecoDMS desktop components, you need to connect a profile with the ecoDMS Server. Complete the following steps [2, 3]:

1. Open the ecoDMS Connection Manager.

2. Click the "New Profile" button.

3. Enter the appropriate information in the dialogue box:
   a) **Profile Name:** Enter a name for your profile. This can be, for example, the name of the company or the name of the server. If you have created more than one profile, ecoDMS also displays this name in a dropdown menu before the clients start or before archiving starts via the PDF/A Printer or other Plugins.

b) **Server:** Enter the IP address of the ecoDMS Server. The IP address allows the ecoDMS Client to address and communicate with the ecoDMS Server. In case of a local installation, you can also enter "localhost".

c) **Port:** The default port is port "17001". You must enter the correct port to connect to the server.

d) **Archive:** ecoDMS loads the archive once it has successfully checked the server connection. For a successful connection, the server and port information must be correct. To check the connection, click the "Check Connection" button. If this is successful, the archive loads. As a default, ecoDMS displays the "Default Archive". If there are more archives available, check and then select the one you need.

e) **User Name:** Enter your user name here. Once ecoDMS has successfully checked the user name, you have the option to store the user login information in your profile. The information for automatic and manual login is then stored locally on each workstation. For more information, refer to the chapter "Login Credentials" or, if you are a user, ask your administrator.

f) **Password:** Enter the password for your user name. Once ecoDMS has successfully checked the user name, you have the option to store the user login information in your profile. The information for automatic and manual login is then stored locally on each workstation. For more information, refer to the chapter "Login Credentials" or, if you are a user, ask your administrator.

g) **Search Shortcut:** With a user-defined shortcut, users can start the ecoDMS full-text search from any application. Enter the required shortcut for your profile. Please note the information and steps from the section "Shortcut Search" in the chapter "Search and Filters".

h) **Connect Automatically:** If you enable the checkbox, this profile automatically registers after you start the Connection Manager. Attention! An ecoDMS License is required for each profile that is registered simultaneously. The connection to the ecoDMS Server is only terminated if all clients are closed and the connections have been disconnected in the Connection Manager at the respective workstation.

i) **Save:** Click "Save" to save the settings. ecoDMS now automatically connects you with the ecoDMS Server and you can work with the software.

j) **Cancel:** Click "Cancel" to cancel the operation.
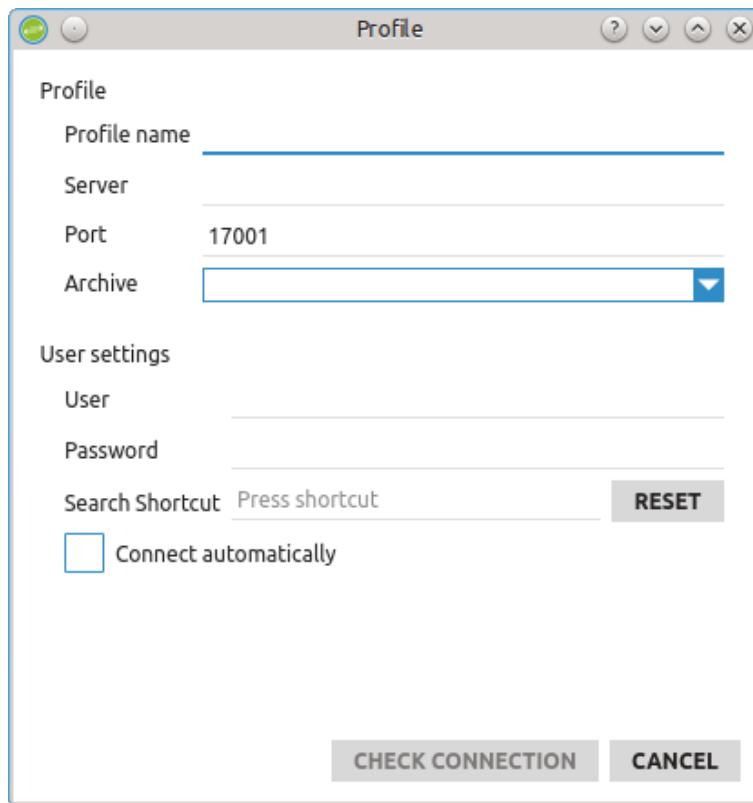
Fig. (similar) 4.8: Connection Manager - Create Profile

4.7 Edit Profiles

Existing profiles can be edited if necessary. But a profile can only be edited when the connection to the server for this profile is not active [3].

1. Open the ecoDMS Connection Manager.

2. Select the profile in the table.

3. Click "Disconnect" to disconnect the profile from the server.

4. Click the "Edit Profile" button.

5. Enter the appropriate information according to "Create Profiles and Login" in the dialogue box.

Fig. (similar) 4.9: Connection Manager - Edit Profile

4.8 Connect Profile

There are several methods for establishing the connection of a profile [2, 3]:

1. If the option "Connect automatically" is enabled in the user profile, the profile automatically connects when the Connection Manager is started.

2. If the option "Connect automatically" is NOT enabled in the user profile, the profile must be connected manually when the Connection Manager is started.

    a) Select the profile in the Connection Manager.

    b) Then click the button "Connect".

        i. Depending on the profile, ecoDMS either displays the user information or you need to enter the user information manually.

4.9 Disconnect Profile

To end the connection to the ecoDMS Server [1]:

1. Open the ecoDMS Connection Manager.

2. Select the profile in the table.

3. Click "Disconnect" to disconnect the profile from the server.

4.10 Delete Profile

To remove a profile, complete the followings steps. You cannot undo this operation [1].

1. Open the ecoDMS Connection Manager.

2. Select the profile in the table.

3. Click "Disconnect" to disconnect the profile from the server.

4. Click the "Delete Profile" button.

5. Confirm the warning message with "Yes" to permanently remove the profile. Click "No" to cancel the operation.

4.11 Change Password

If you want to change a password, please read the relevant paragraph in the chapter "User and Group Management".

4.12 Open ecoDMS Archive

If the Connection Manager and the ecoDMS Server are connected, you can open the client. There are several options [2]:

1. Double-click the ecoDMS icon on your desktop or on your toolbar **or**

2. Select the ecoDMS programme file in the programme manager of your operating system **or**

3. Click the button "Open Client" in the Connection Manger.

Then the programme starts. The ecoDMS start screen displays.

Fig. (similar) 4.10: ecoDMS Desktop Icon

4.12.1 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
```

4.13 Exit ecoDMS Archive

If you do not need the clients, you can close them. You have the choice between the following options if you want to exit the application [1]:

1. Click the "Exit" icon of the title bar. **or**

2. Select "File - Exit" from the menu. **or**

3. Use this keyboard shortcut: Ctrl+ Q

Fig. (similar) 4.11: File - Exit

Important Information for Chapter 4

[1] *The connection to the ecoDMS server is only terminated if all clients are 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 licence! To do this, close or disconnect all ecoDMS components and the connection manager at the workstation.*

[2] *To use the ecoDMS components, a connection to the ecoDMS server must exist.*

[3] *You can create any number of profiles. The number of connected profiles depends on the number of purchased licences. An error message displays if the number of available licences is exceeded. If connection errors occur repeatedly, access is blocked for approximately 10 minutes for security reasons.*

5 User and Group Management

To ensure secure access to the system and the documents it contains, each user should receive login credentials and the respective access rights. To create users and groups ecoDMS uses a "roles system". You can create and manage them with the user and group management function in the ecoDMS Client. As on option the users can also be connected from Active Directory and LDAP with ecoDMS.

5.1 Basics

This section contains important information on the user and group management in ecoDMS.

5.1.1 Explanation of the Roles System

ecoDMS uses a Roles System. Roles are the users, groups and permissions within the system a role can also include more users and act as a group.
System permissions and user groups can or should be assigned to each user. The system permissions decide which functions are available to the user. These can be different depending on the user. Moreover, we recommend that a role (user group) is created for each team in the company. For example, a common role can be assigned to all employees in the Accounting department. The same applies to the management, sales an all other departments and groups in a company. This structure allows a detailed and straightforward assignment of folder and document permissions. You have the following options to assign "roles" and "groups".

5.1.2 Default User

The "ecoDMS" and "ecoSIMSAdmin" users are automatically created during the installation of the document archive. For more details about this users, refer to the chapter "Login Credentials".

5.1.3 Edit User

Changes in user and role management only take effect after the respective users restart the client. If you want to hide this message box in future, enable the checkbox "Do not show this message again".
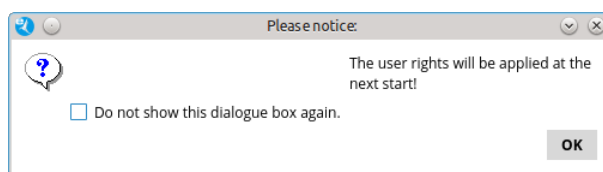
Fig. (similar) 5.1: Notification User and Group Management

5.2 System Privileges

In the following the system privileges are explained. You can also read here how you can assign user permissions [4].

5.2.1 Available Roles / System Privileges

The user is allowed to...

1. **administer the system. = ecoSIMSAdmin**

   The "ecoSIMSAdmin" role should only be assigned to users in charge of administering the system and who are allowed to execute sensitive functions. Functions such as deleting documents and extended data export are exclusive to this role. Furthermore, users with this role can make various settings and assign access permissions. This role should therefore only be assigned to people in a leading position, who are also familiar with the programme.

2. **archive and classify documents. = ecoSIMSCLASSIFY**

   The "ecoSIMSCLASSIFY" role is required for classification and archiving. This is the only way for a user to archive and classify documents in ecoDMS. If this role is missing, you cannot archive or classify.

3. **use the version management. =ecoSIMSVERSIONING**

   The "ecoSIMSVERSIONING" role is necessary to use the version management. This role is necessary to see the version management, edit existing versions and to finalise versions.

4. **use the Inbox.= ecoICELogon**

   The "ecoICELogon" role is necessary to use the ecoDMS Inbox. Users with this permission can open this part of the application, view the shared documents and work with the program.

5. **view the document history. = ecoSIMSHISTORY**

   The "ecoSIMSHISTORY" role allows the display of the user and document history in ecoDMS.

6. **create new folders. = ecoSIMSCREATEFOLDER**

   The "ecoSIMSCREATEFOLDER" role enables a user to create new folders without using the Settings dialogue box and without administrator rights. The user can create folders directly in the ecoDMS folder structure (and with the "classification dialogue box"). However, assigning folder permissions is not possible from here. The administrator still needs to make this setting in the Settings dialogue box. It is recommended to create the structures as easy and flat as possible. This role should therefore only be assigned to people in a leading position, who are also familiar with the programme.

7. **see all documents regardless of their permissions. = ecoSIMSALLDOCS**

   The "ecoSIMSALLDOCS" role allows users to view all documents and is above all permissions. Any folder and document permissions are ignored by this role. It allows the viewing of documents and folders for which a user may not have permission, for example. Moreover, this role can make classification changes to all documents, even locked documents. Therefore, this role should only be assigned to super administrators who need to have access to every document. For data protection and security reasons, this permission should only be assigned to people in a leading position, who are also familiar with the programme. Ideally, this role is given only to a "Super Administrator".

8. **use the Web Interface. = ecoSIMSWEBCLIENT**

   The "ecoSIMSWEBCLIENT" role is required to use the web service (Webinterface / Web Client) of ecoDMS.

9. **ecoSIMSUSER**

   The role "ecoSIMSUSER" is automatically assigned when you create a user in ecoDMS. This permission is necessary to use and open the system.

10. **scanner**

    The "scanner" role is an internal System Permission of ecoDMS. The role is among others required to assign folder permissions. If a folder is provided with an authorisation, the role "scanner" should always be enabled for this folder. Otherwise when using classification templates -depending on the folder permissions- assignment of scanned documents is not permitted for the folder because of safety reasons.
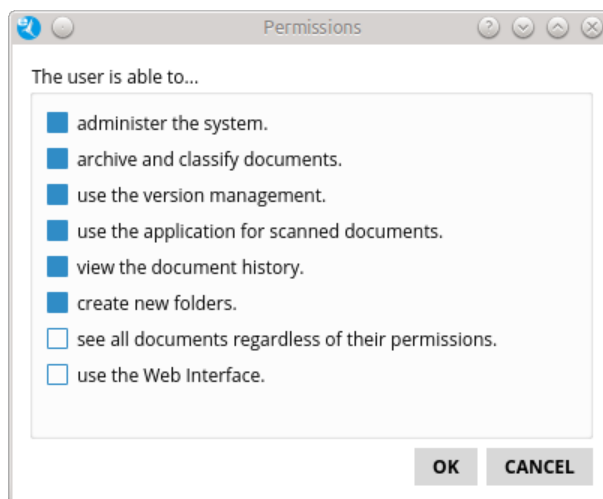
Fig. (similar) 5.2: Dialogue Box - Permissions

5.2.2 Assign Permissions via dialogue box (recommended)

You can assign system permission via the dialogue box or via Drag & Drop. In this section you can read how to use the "dialogue box" function for this process [3, 1].

1. Select the user in the "Users" area of the "User and Group Management".

2. Click the "Permissions" button.

3. The available permissions are displayed in a new dialogue box. Select the permissions by selecting them with a check mark.

4. Save your settings with "OK" or cancel the operation with "Cancel".
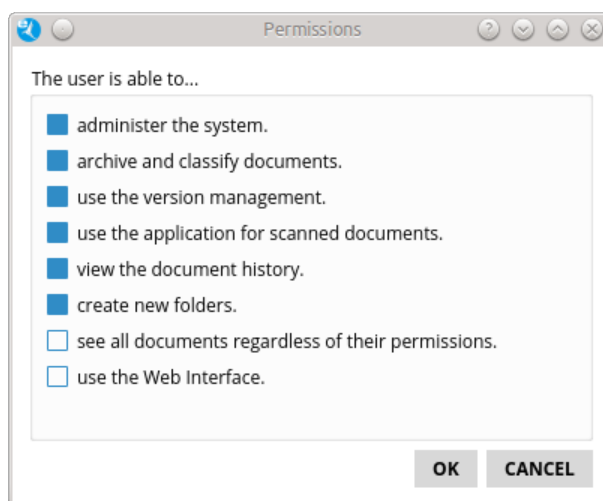
Fig. (similar) 5.3: Dialogue Box - Permissions

5.2.3 Assign Permissions via Drag & Drop

You can assign system permission via the dialogue box or via Drag & Drop. In this section you can read how to use the "Drag & Drop" function for this process. You have the following options [3, 1]:

1. Method

1. Select the user in the "Users" area of the "User and Group Management".

2. Select the roles separately in the "Available Roles" area and drag them via Drag & Drop to the "Assigned Roles" area.

2. Method

1. Select the role in the "Available Roles" area of the "User and Group Management".

2. Select the users separately in the "Users" area and drag them via Drag & Drop to the "Assigned Users" area.

5.2.4 Delete Permissions via Dialogue Box (recommended)

The assigned system permissions can be deleted from a user via a dialogue box or directly in the user and group management. In this section you can read how to use the "Dialogue Box" function for this process [3, 1].

1. Select the user in the "Users" area of the "User and Group Management".

2. Click the button "Permissions".

3. The available permissions are displayed in a new dialogue box. Disable the permissions by removing the check mark.

4. Save your settings with "OK" or cancel the operation with "Cancel".
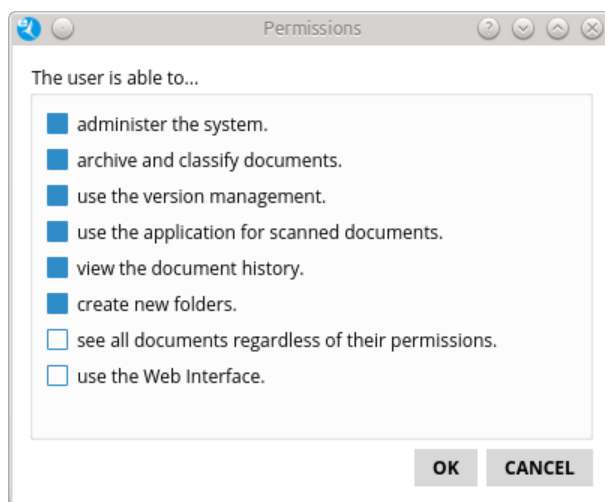
Fig. (similar) 5.4: Dialogue Box - Permissions

5.2.5 Delete Permissions Directly

The assigned system permissions can be deleted from a user via a dialogue box or directly in the user and group management. In this section you can read how to use the "Drag & Drop" function for this process. You have the following options [3, 1]:

1. Method

1. Select the user in the "Users" area of the "User and Group Management".

2. Select the roles you want to delete separately in the "Available Roles" area.

3. Click the "Remove" button.

2. Method

1. Select the role in the "Available Roles" area of the "User and Group Management".

2. Select the users you want to delete separately in the "Assigned Users" area.

3. Click the "Remove" button.

5.3 User Management

The ecoDMS Archive provides several options for creating and managing users [4, 3, 1].

1. You can create and manage roles (users) directly from the ecoDMS User Management.
   and/or

2. If you use LDAP or Active Directory services, you can connect them with the archive via the ecoDMS User Management.

This section explains how to create and manage the roles (users) **directly from ecoDMS [4, 3].**

5.3.1 Create User

To add new users, complete the following steps [4, 3, 1]:

1. Click the "New" button in the "Users" area.

2. A dialogue box opens. Enter the user information.

   a) **Name:** Here the name of the user is entered. As a rule, first and last name are entered.
   Example:

   ```
   John Doe
   ```

   b) **Acronym:** Here you can optionally enter an acronym of the name.
   Example:

   ```
   jd
   ```

   c) **Login Name:** Here the actual user name is written, which must be entered by the user when logging in to the system.
   Example:

   ```
   j.doe
   ```

      i. The login name is stored after successful completion of the process in ecoDMS as a "role".
   Example:

   ```
   r_j.doe
   ```

   d) **Password:** Enter the user password here. On first login, the user is asked to replace this password with an own, new password.

   e) **Confirm Password:** The password must be confirmed for safety here.

3. Confirm your entry with "OK" or cancel the operation with "Cancel".
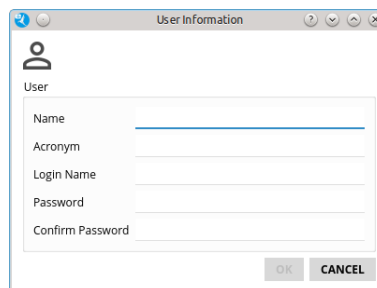
Fig. (similar) 5.5: Create New User

5.3.2 Edit User

You can edit the user information if needed. Proceed as followed [4, 3, 1]:

1. Select the user you want to edit in the "Users" area of the "User and Group Management".

2. Click the "Edit" button.

3. The "User Information" dialogue box opens. Here you can edit the following information:

    a) **Name:** Here the name of the user is entered. As a rule, first and last name are entered.
    Example:

    ```
    John Doe
    ```

    b) **Acronym:** Here you can optionally enter an acronym of the name.
    Example:

    ```
    jd
    ```

    c) **Login Name:** You cannot change the login name.

4. Confirm your entry with "OK" or cancel the operation with "Cancel".
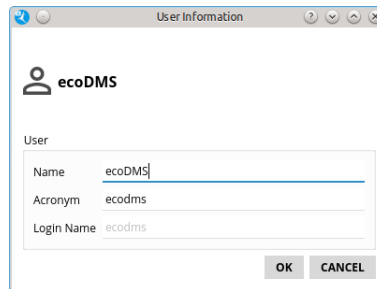
Fig. (similar) 5.6: Edit User Information

5.3.3 Copy User

Permissions and Groups should be assigned to each user. For example, if several users with the same Permissions and Groups have to be created, a user can serve as a template. This template can be copied. In this case, the assigned system permissions and groups will be copied, so that only the new User Information must be entered [4, 3, 1].

1. Select the user you want to copy in the "Users" area of the "User and Group Management".

2. Click the button "Edit".

3. A dialogue box opens. Enter the user information.

    a) **Name:** Here the name of the user is entered. As a rule, first and last name are entered.
    Example:

    ```
    John Doe
    ```

    b) **Acronym:** Here you can optionally enter an acronym of the name.
    Example:

    ```
    jd
    ```

    c) **Login Name:** Here the actual user name is written, which must be entered by the user when logging in to the system.
    Example:

    ```
    j.doe
    ```

i. The login name is stored after successful completion of the process in ecoDMS as a "role".
Example:

```
r_j.doe
```

d) **Password:** Enter the user password here. On first login, the user is asked to replace this password with an own, new password.

e) **Confirm Password:** The password must be confirmed for safety here.

4. Confirm your entry with "OK" or cancel the operation with "Cancel".

5. Confirm your entry with "OK" or cancel the operation with "Cancel".

6. The new user is created. You can see the same permissions like the copied user in the "Assigned Roles" area.

Fig. (similar) 5.7: Copy User

5.3.4 Delete User

Created users can be deleted if necessary. You cannot undo this operation. We recommend that all documents, which are DIRECTLY assigned to this user within the classification, are assigned to another user BEFORE deleting the user. To delete users [3, 1]:

1. Select the user you want to delete in the "Users" area of the "User and Group Management".

2. Click the "Delete" button.

5.4 LDAP / Active Directory Management

As on option the users can also be connected from Active Directory and LDAP with ecoDMS. The combination of Active Directory, LDAP and ecoDMS allows easy and uniform management of ecoDMS and LDAP users. You can manage the system permissions for users centrally through the LDAP menu. In this section you will learn how to load and manage roles (users) from **LDAP or Active Directory**.

Licensing You need a license to use LDAP and Active Directory within ecoDMS. You can test the functions before purchasing in the demo version. If you do not activate a valid license after the demo phase, it is not possible to connect the created LDAP and AD-Users with ecoDMS any further.

Recommendation With the LDAP/AD menu you can filter by members/users of an AD/LDAP group and assign the same permissions to them. We therefore recommend you already create groups with the respective users for ecoDMS in LDAP/AD. Then you can create a filter for each group so that the users are displayed in the dialogue box. The same permissions can now be assigned to all members of this group.

Login The users are then registered in the Connection Manager with the user login credentials from the LDAP/AD.

Information The ecoDMS Archive offers different options for creating and managing users [3, 1, 2].

1. You can create and manage roles (users) directly through the ecoDMS user management function **and/or**

2. If you are using LDAP or Active Directory services, you can use the ecoDMS user management function to connect them with the archive.

5.4.1 Basics

– Active Directory (AD) is the Microsoft Windows server directory service. You can use this component to configure a network according to the company structures. To do this, different configurations and devices such as, for example, services, users, groups, permissions, scanners and printers, including their settings, are administered in a central network. With active directory, the responsible administrators can organise, provide and monitor this information.

– Since Windows Server 2008, active directory consists of five different roles. One of these roles is the LDAP directory. LDAP stands for Lightweight Directory Access Protocol and provides, among others, information on users and their associated groups. You can use this protocol and a specific syntax to request information from an LDAP directory.

5.4.2 LDAP/ Active Directory Open Dialogue Box

1. Open the User and Group Management in the ecoDMS Client [3, 1, 4].

2. Click "LDAP / Active Directory".

3. The "LDAP / Active Directory" dialogue box opens where you can manage services and users.

Figure 5.8: Icon - Open User and Group Management
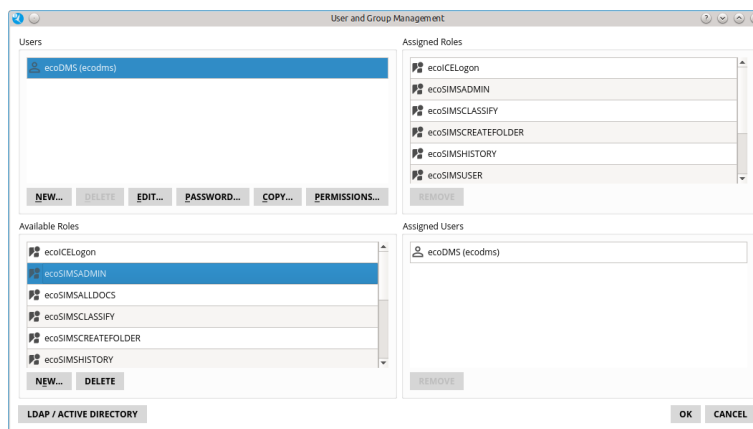
Figure 5.9: User and Group Management

Figure 5.10: Dialogue Box - LDAP / Active Directory

5.4.3 Create / Edit LDAP Profile

To create a new LDAP profile, complete the following steps [3, 1, 4]:

1. Open the LDAP / Active Directory dialogue box in the user and group management function.

2. Click "New".

3. The "New Profile" dialogue box opens.
    a) Assign a name to the profile in the "Name" entry field.
    b) Select "LDAP" as "Type".
    c) Confirm your entry with "OK" or cancel the operation with "Cancel".

4. Now enter the existing connection data of LDAP in the "Connection" area.
    a) **URL:** Enter the host name or the IP address of the LDAP server used for user authentication. Example:

    ```
    ldap://server01
    ```

    b) **Base DN:** Enter the Base DN of your LDAP server here. The Base DN specifies from which place in a directory structure to start the search for specific objects.
    c) **User DN:** Enter the user name which ecoDMS uses for authentication with the LDAP server.
    d) **Password:** Enter the matching password here.
    e) **Search DN:** Enter the top Level DN of the subtree in the LDAP directory hierarchy where the users / groups are stored.
    f) **Filters:** Use the "Filters" parameter to filter (limit) the result of the users / groups returned by the LDAP.
    g) **UID Field:** Use this entry field to define the method to create the LDAP query which searches for the user data.

5. Click "Test / Reload" to check the entries and to load the user / group list.

6. Then assign the respective system permissions to the users. You can read more on permissions in the Permissions section.

7. Confirm the settings with "OK" or cancel the operation with "Cancel".
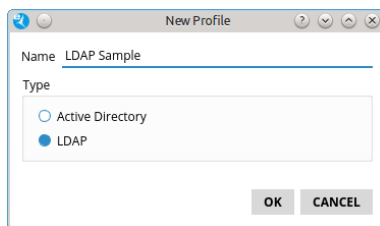
Figure 5.11: Create LDAP Profile
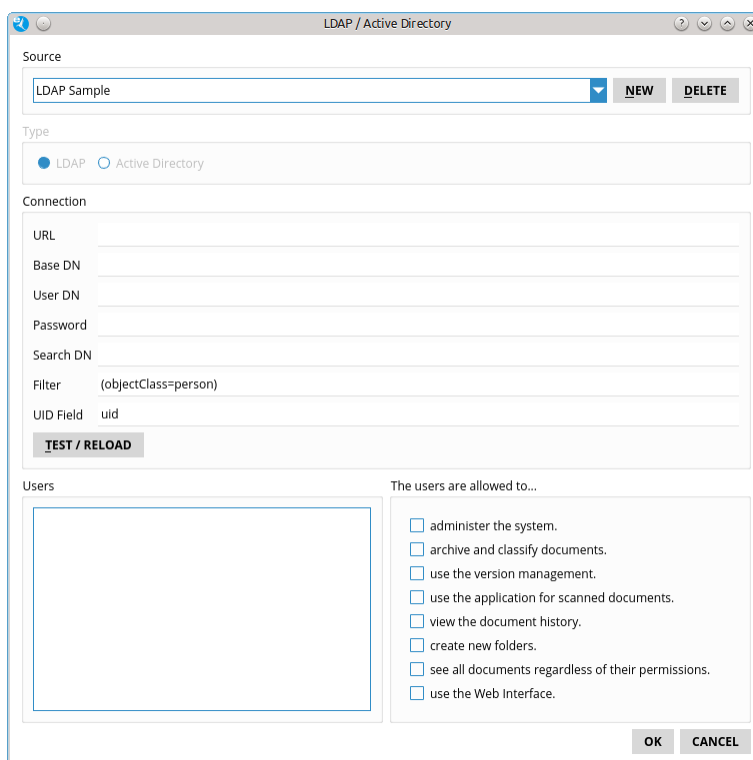
Figure 5.12: LDAP Management

5.4.4 Create /Edit Active Directory Profile

To create a new LDAP profile, complete the following steps [3, 1, 4]:

1. Open the LDAP / Active Directory dialogue box in the user and group management function.

2. Click "New".

3. The "New Profile" dialogue box opens.

   a) Assign a name to the profile in the "Name" entry field.

   b) Select "Active Directory" as "Type".

   c) Confirm your entry with "OK" or cancel the operation with "Cancel".

4. Now enter the existing connection data of "Active Directory" in the "Connection" area.

   a) **URL:** Enter the host name or the IP address of the LDAP server used for user authentication. Example:

   ```
   ldap://server01
   ```

b) **Base DN:** Enter the Base DN of your LDAP server here. The Base DN specifies from which place in a directory structure to start the search for specific objects.

c) **User DN:** Enter the user name which ecoDMS uses for authentication with the LDAP server.

d) **Password:** Enter the matching password here.

e) **Search DN:** Enter the top Level DN of the subtree in the LDAP directory hierarchy where the users / groups are stored.

f) **Filters:** Use the "Filters" parameter to filter (limit) the result of the users / groups returned by the LDAP.

g) **UID Field:** In this field you can define the method with which you create the LDAP request to determine the user data.

i. If you register with the complete domain name, you must enter the following:

```
userPrincipalName
```

Now you can register with the complete domain name (e.g. sample@demomail.de) in ecoDMS.

5. Click "Test / Reload" to check the entries and to load the user / group list.

6. Then assign the respective system permissions to the users. You can read more on permissions in the Permissions section.

7. Confirm the settings with "OK" or cancel the operation with "Cancel".
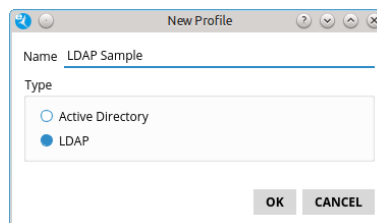
Figure 5.13: Create Active Directory Profile
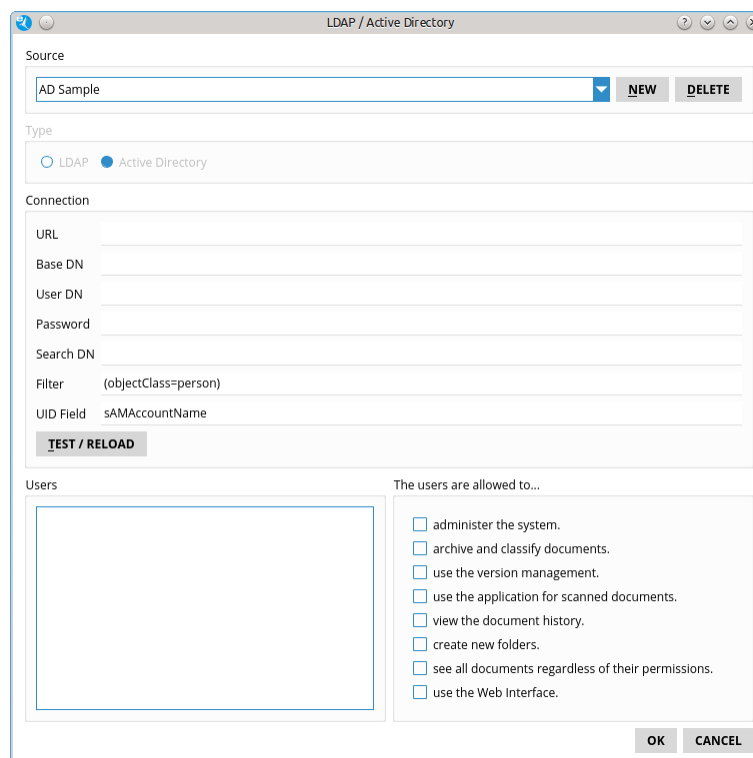
Figure 5.14: Active Directory Management

5.4.5 Example Values LDAP & Active Directory

The following values are example values for entering the LDAP / Active Directory information [3, 1, 4].

```
URL: ldap://192.168.1.1
Base DN: dc=sampledomain,dc=local
User DN: Administrator@sampledomain.local
Password: 123456
SearchDN: cn=Users
Filter: (&(objectcategory=user)(memberof=CN=Sample-Admins,CN=Users,DC=sampledomain,DC=local))
UID Field: sAMAccountName
```

5.5 Custom Groups (Roles)

In ecoDMS you can create user groups (roles), for example, accounting, management, tax advisor, private... . Here you can group, for example, members of a team / department [3, 1, 4].

5.5.1 Create Custom Group

To create your custom user group [1, 4]:

1. Click the "New" button in the "Available Roles" area of the User and Group Management.

2. A dialogue box opens. Enter the group / role name in the field "Role Name".

3. Save the role with "OK" or cancel the operation with "Cancel".
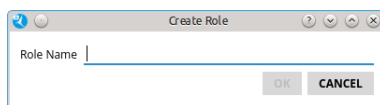
Figure 5.15: Create Custom Role

5.5.2 Assign Users to Group

There are several options to assign users to custom role(s) [1, 4, 3]:
1. Method

1. Select the user in the "Users" area of the "User and Group Management".

2. Select the groups (roles) separately in the "Available Roles" area and drag them via Drag & Drop to the "Assigned Roles" area.

2. Method

1. Select the group (role) in the "Available Roles" area of the "User and Group Management".

2. Select the users separately in the "Users" area and drag them via Drag & Drop to the "Assigned Users" area.
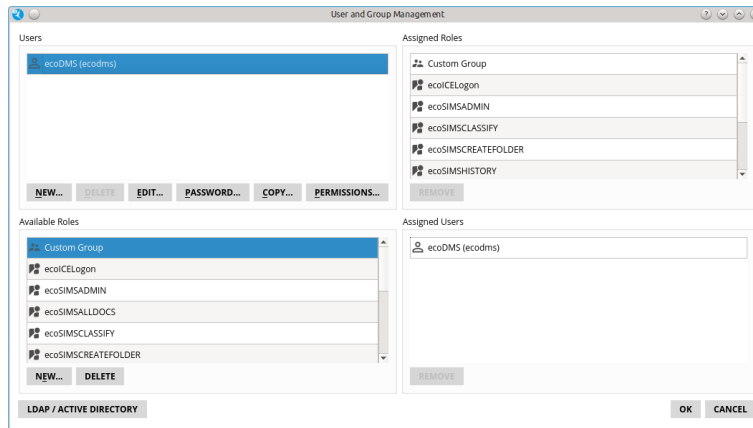
Figure 5.16: Assign Users to Group

5.5.3 Delete Users from Group

There are several options to assign users to custom role(s) [1, 4, 3]:

1. Method

1. Select the user in the "Users" area of the "User and Group Management".

2. Select the groups (roles) you want to delete separately in the "Available Roles" area.

3. Click the "Remove" button.

2. Method

1. Select the group (role) in the "Available Roles" area of the "User and Group Management".

2. Select the users you want to delete separately in the "Assigned Users" area.

3. Click the "Remove" button.
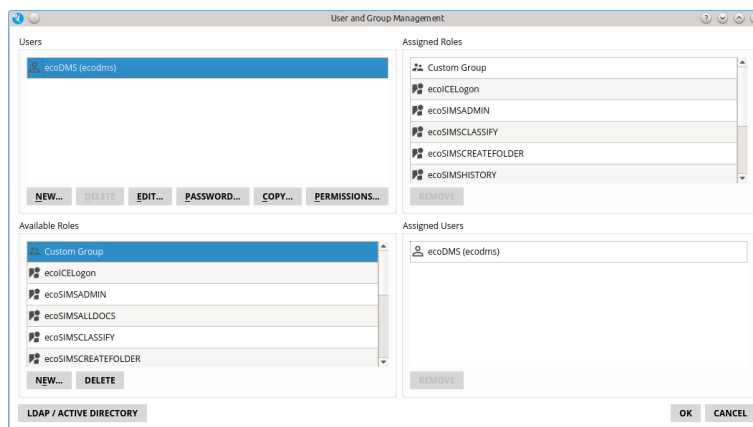
Figure 5.17: Delete Users from Group

5.5.4 Delete Custom Groups

You can delete custom groups / roles if needed. You cannot undo this operation. Please notice that "Default System Roles" (eco...) cannot be deleted [1, 4, 3].

1. Select the group (role) in the "Available Roles" area of the "User and Group Management".

2. Click the "Delete" button.

5.5.5 Example: Custom Groups

The accounting department has 8 employees. Each employee receives his or her personal access information and permissions. There is an invoice in the incoming mail, which the accounting department needs to process. In this case it is clear from the beginning, which employees should be given the permission for this document. To save assigning the document to each of the 8 employees, it makes sense to create an "Accounting" role. All 8 employees are included. If you record the responsibility when classifying the invoice, you can assign the "Accounting" role to the document.

5.6 Change Passwords

The user passwords can be changed anytime by the administrator and the user [1, 3].

5.6.1 Change Password as Administrator

ecoDMS administrators are allowed to change passwords. To do this, they do not need to know the current password. The administrator can overwrite passwords. With the next login, the user then has to enter the new password and replace it with his own password [1, 3].

1. Select the user you want to change the password in the "Users" area of the "User and Group Management".

2. Then click "Password"

3. A dialogue box opens. Enter the new password information.
   a) **Password:** Enter the user password here. On first login, the user is asked to replace this password with an own, new password.
   b) **Confirm Password:** The password must be confirmed for safety here.

4. Confirm your entry with "OK" or cancel the operation with "Cancel".
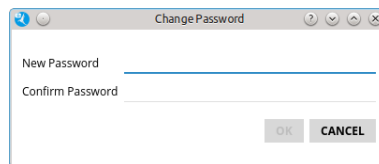
Figure 5.18: Change Password as Administrator

5.6.2 Change Own Password

Use the Connection Manager to change your password [1].

1. Open the ecoDMS Connection Manager

2. Login with your current password information.

3. Click the button "Change Password".

4. A dialogue box opens. Enter the new password information.
   a) **Current Password:** Enter the current user password here.
   b) **Password:** Enter the new user password here.
   c) **Confirm Password:** The password must be confirmed for safety here.

5. Confirm your entry with "OK" or cancel the operation with "Cancel".
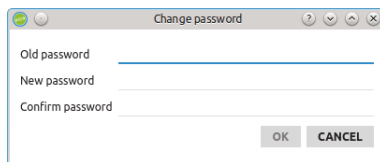
Figure 5.19: Change User Password

5.6.3 Change Password of ecoSIMSAdmin

You can change the password of the "ecoSIMSAdmin" user in the Connection Manager. Please note that the "ecoSIMSAdmin" does not display as a user in the user management function [1, 3].

1. Open the Connection Manager.

2. Login with the current password information of "ecoSIMSAdmin".

3. Click the button "Change Password".

4. A dialogue box opens. Enter the new password information.

    a) **Current Password:** Enter the current password of "ecoSIMSAdmin" here.

    b) **Password:** Enter the new password of "ecoSIMSAdmin" here.

    c) **Confirm Password:** The password must be confirmed for safety here.

5. Confirm your entry with "OK" or cancel the operation with "Cancel".
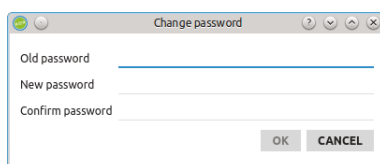
Figure 5.20: Change ecoSIMSAdmin Password

5.7 Reset Passwords

The ecoDMS Archive includes a security function. This feature locks a user if the password was entered incorrectly multiple times. The Connection Manager displays the message "User is locked". To reset the password and unlock the user, complete the following steps [1, 3].

1. Login with the login data of the ecoDMS System Administrator "ecoSIMSAdmin". Please refer to chapter "Login Credentials" to read the login data.

    a) As an option you can also login with a ecoDMS user who has the right to administer the system (System Role ecoSIMSAdmin).

2. Open the ecoDMS Client and start the "User and Group Management".

3. Select the user you want to change the password in the "Users" area of the "User and Group Management".

4. Then click "Password"

5. A dialogue box opens. Enter the new password information.

    a) **Password:** Enter the new user password here.

        i. The old password must not be known for this process.

        ii. When first login, the user is asked to replace this password with a new password.

    b) **Confirm Password:** The password must be confirmed for safety here.

6. Confirm your entry with "OK" or cancel the operation with "Cancel".

   a) The user is unlocked now.

7. The user can login with the new password via the Connection Manager now.

   a) When first login, the user is asked to replace this password with a new password.

Important Information for Chapter 5

[1]   *All permissions take effect after the respective user restarts the programme.*

[2]   *This feature requires a licence of the ecoDMS full version but can be tested during the time and is then automatically disabled until a full licence is activated.*

[3]   *Viewing and using this function requires specific system permissions.*

[4]   *We recommend you create and use user groups. This simplifies classification and assignment immensely.*

6 Settings

Configure ecoDMS according to your internal specifications by setting document types with specific retention periods, creating folder structures and access rights, setting status, activating your license, making settings for automatic data backup, configuring web, mobile and API services and setting other configurations [9].

6.1 Open Settings Dialogue Box

There are several options to open the settings dialogue box [9]:

1. **ecoDMS Menu:** Select the "Options - Settings" menu item.

2. **Icon in ecoDMS:** Click the "Settings" icon in the tool bar.

3. **Keyboard shortcut in ecoDMS:** Ctrl + Alt + S"

Figure 6.1: Icon - Settings

6.2 Archives

Documents can be stored in different archives. However, this is not recommended. To draw the best possible benefit from the advantages the software offers, we recommend you to store all data in an archive (Keyword: Filter functions). An archive is only used to separate documents within a server and is not an independent server. Because of that you cannot assign user-defined settings, structures, users, groups and/or permissions to archives [1, 11].
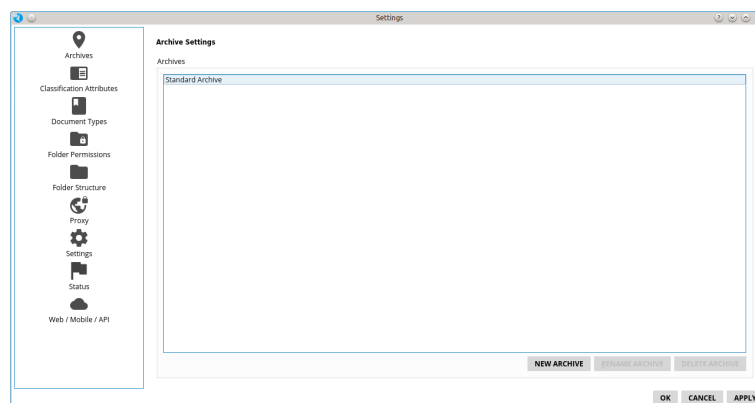
Figure 6.2: Settings - Archives

6.2.1 Create Archive

You can create a new archive (not recommended!) as follows [1, 11, 2]:

1. Click the "New Archive" button.

2. Enter the name for the new archive in the dialogue box.

3. Confirm your entry with "OK" or cancel the operation with "Cancel".

4. Click "Apply" to save the process in the Settings dialogue box.

6.2.2 Rename Archive

To rename an archive complete the following steps [2]:

1. Select the Archive.

2. Click "Rename Archive".

3. Enter the new "Archive Name" in the dialogue box.

4. Confirm your entry with "OK" or cancel the operation with "Cancel".

5. Click "Apply" to save the process in the Settings dialogue box.

6.2.3 Delete Archive

If necessary, you can delete empty archives. Please note that at least one archive must exist. Only empty archives (please also note the trash) can be deleted [1, 11, 2].

1. Select the archive you want to delete.

2. Click "Delete Archive".
    a) You can only delete an archive if no documents are assigned to it.
    b) Please also refer to the function "Move to Archive".

3. Confirm your entry with "OK" or cancel the operation with "Cancel".

4. Click "Apply" to save the process in the Settings dialogue box.

6.3 Document Types & Retention Periods

Using archiving software changes the familiar folder structure. In a file system, customer folders often contain subfolders for Invoices, Offers, etc. This "complicated" structure is no longer necessary here. The previous sub folders are created in ecoDMS as document types. The folder structure therefore contains only main folders. The sub categories are created when classifying with the Document Type attribute. When assigning documents, the type of document (e.g. incoming invoices, outgoing invoices, agreement, offer is specified in Document Type. We recommend you select the Document Type when classifying each document you archive. This makes the handling and the retrieval of documents much easier.
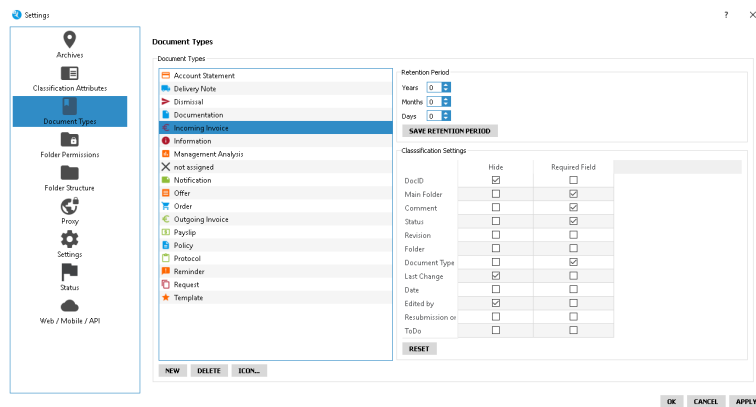
Figure 6.3: Settings - Document Types

6.3.1 Document Types: Description and Examples

The Document Type is a "classification attribute" in ecoDMS. When assigning documents, this attribute specifies the document type. We recommend you select the Document Type when classifying each document you archive. This makes the handling and the retrieval of documents much easier. When searching for specific files, the documents can be filtered precisely. Please note that document types should not appear in the folder structure.

1. **An example for a query:**
   You want to display all "incoming invoices" from "Sample Company" company with a "ToDo" status.

   a) Through assigning classification attributes and document type, the filters in ecoDMS can be configured for the exact search criteria.

   b) As the classification attributes can also be included in the full text search, the following full text search would also be possible: "Incoming invoices Sample Company ToDo".

   c) The matching documents are displayed quickly and clearly in the ecoDMS table.

2. **Examples of typical document types:**

Request	Offer	Cover Letter
Purchase Order	Notification	Certificate
Order	Management Analysis	Documentation
Photo	Payslip	Assessment
Information	Calculation	Account Statement
Dismissal	Delivery Note	Reminder
Policy	Incoming Invoice	Outgoing Invoice
Agreement	Testimonial	

6.3.2 Create New Document Type

To create a new Document Type, complete the following steps [9, 2]:

1. Select the tab "Document Types" in the Settings dialogue box.

2. Click the "New" button

3. Click in to the field "New Document Type".

4. Overwrite the entry with your custom name.

5. Repeat this process to create more "document types".

6. Click "Apply" to save the process in the Settings dialogue box.

6.3.3 Retention Period

For each document type you create you can assign retention periods. The retention period determines the minimum period over which a document must be stored in ecoDMS. Only after the retention period has expired, the documents can be removed irrevocably from the archive.

- Please note that the retention periods entered here for document types are automatically applied to other documents with the same classification.

- Once you have saved a retention period, you cannot change it again.

- You cannot delete the documents from the system during the retention period.

- If a document is reclassified as a different document type, the new retention period applies; however, you can always view the original retention period in the document history.

ecoDMS uses the value stored in the default attribute -Date- as the start date for a retention period.

6.3.3.1 Create Retention Period

To create a retention period [9, 2]:

1. Select the document type in "Settings - Document Types".

2. Enter the retention time in the "Retention period" area. Here you have the following fields:

    a) Years

    b) Months

    c) Days

3. Confirm the operation by clicking "Save Retention Period".

4. A dialogue opens. Please read this information in detail.

    a) Please note that the retention periods entered here for document types are automatically applied to the documents according to their classification and cannot be changed after you first save them!

    b) You cannot delete the documents from the system during the retention period.

    c) If a document is reclassified as a different document type, the new retention period applies; however, you can always view the original retention period in the document history.

5. Confirm the message with "Yes" to save the retention period. Select "No" to cancel the operation.

6. After saving the retention period is automatically saved for all documents with this "Document Type".

7. Click "Apply" to save the process in the Settings dialogue box.
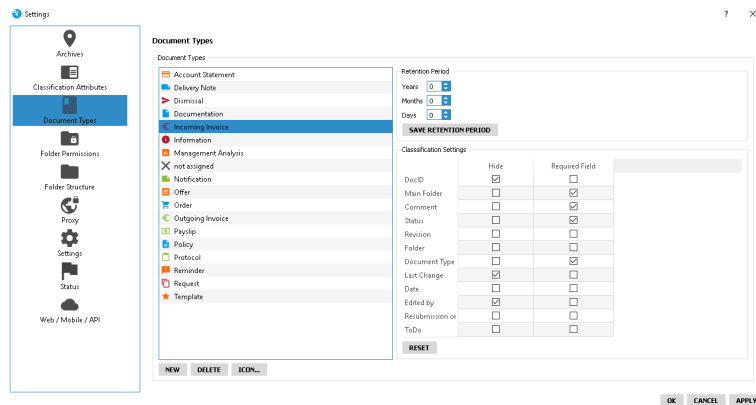
Figure 6.4: Settings - Document Types - Retention Period
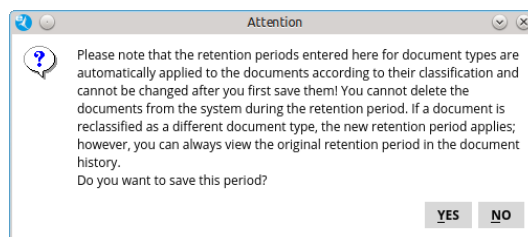
Figure 6.5: Dialogue Box - Retention Period

6.3.4 Classification Settings

In the classification settings area, you can specify which attributes are important for the respective Document Type during classification and where/if you want them to be displayed. This simplifies the classification process as in this case only the necessary attributes are visible to the user during Classification. The following functions are available:

1. Hide non-required classification attributes.

2. Specify required fields for classification.

3. Specify the order of attributes.

The settings always refer to the currently selected Document Type. For each Document Type you can make specific settings. All specified and available attributes are displayed in the classification settings. If you select a Document Type during Classification, for which classification settings exist, the "classification dialogue box" is automatically adjusted to the settings.

6.3.4.1 Set Configuration

For the configuration, complete the following steps [9, 2]:

1. Select the Document Type in the "Settings - Document Types" dialogue box.

2. In the classification settings area, make the following settings:

   a) **Hide:** For the classification, you can hide all attributes that you do not want to display by enabling the checkbox in the "Hide" column.

   b) **Required Field:** All attributes required for the Classification of the selected Document Type can be declared as required fields in the "Required Field" column by enabling the checkbox. During Classification the fields marked as required fields must be filled in. Otherwise you will not be able to save the Classification for the Document Type.

   c) **Order:** If you require a specific order of attributes for the Classification of the selected Document Type, you can specify this here:

      i. Grab the attribute with the mouse and drag it to the required position. The attributes can be moved up or down.

3. You can repeat this process for further document types.

4. Click "Apply" to save the process in the Settings dialogue box.

6.3.5 Rename Document Type

You can rename specified document types. To do so, complete the following steps [9, 2]:

1. Double-click Document Type in the "Settings - Document Types" dialogue box.

2. Overwrite the existing name.

3. Click "Apply" to save the process in the Settings dialogue box.

6.3.6 Delete Document Type

To delete a "document type", complete the following steps [5, 2]:

1. Select the document type in "Settings - Document Types".

2. Click the "Delete" button.

3. Click "Apply" to save the process in the Settings dialogue box.

6.3.7 Assign Icons

You can replace the default icon (green flag) for each "document type" with a custom icon. This allows a better overview for the user [9, 2, 3].

1. Select the document type in "Settings - Document Types".

2. Click the Icon button.

3. Select the path you want and confirm your choice with "Open".

   a) The following file formats are possible: *.png, *.jpg, *jpeg, *.bmp, *.ico

   b) It is recommended to use square icons (eg, 16x16px, 32x32px, 64x64px ...).

   c) ecoDMS does not contain an icon collection, but you can select custom icons from your own collection.

4. Click "Apply" to save the process in the Settings dialogue box.

6.4 Settings

The Settings area is split in to several tabs. Here you can configure the systems to meet your requirements.

6.4.1 General

In this area you can define several, general settings [9, 2]:
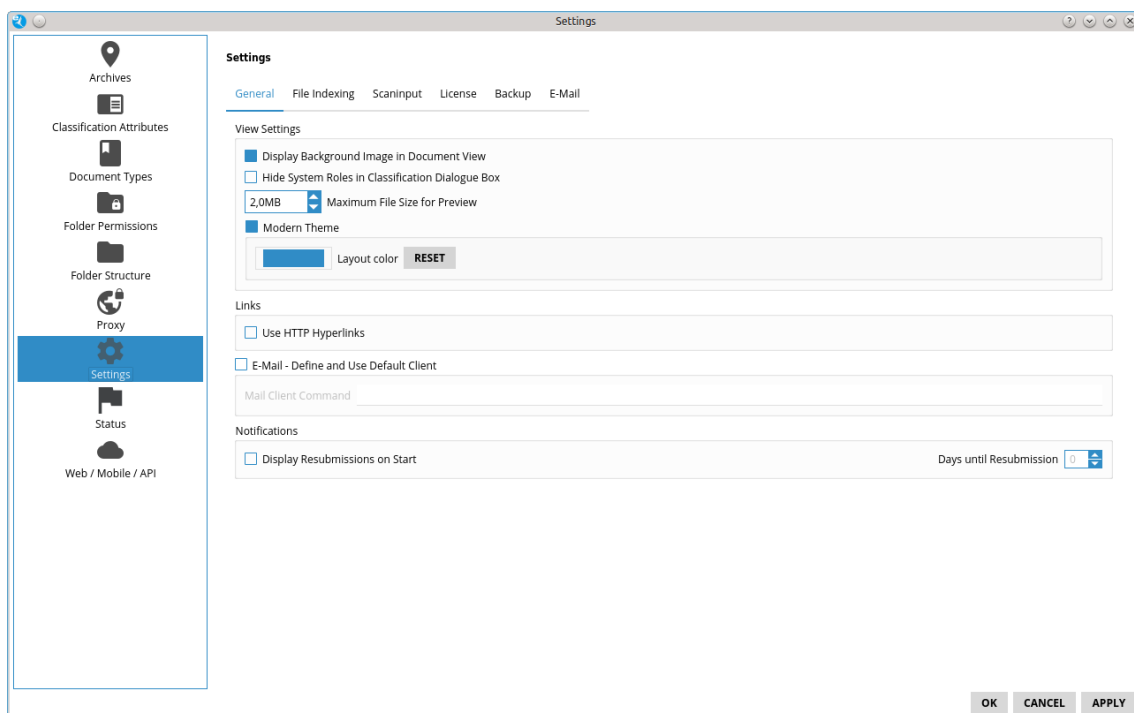
Figure 6.6: Settings - Settings - General

6.4.1.1 Display Background Image in Document View

As default the software logo is displayed in the background of the ecoDMS table. You can hide the logo as required. To hide the image, complete the following steps [9, 2]:

1. Select the tab "Settings - General" in the Settings dialogue box.

2. Remove the check mark in the row "Display Background Image in Document View".

3. Click "Apply" to save the process in the Settings dialogue box.

6.4.1.2 Hide System Roles in classification dialogue box

As default all users, groups and system roles are displayed in the "permissions" area in the classification dialogue box. Normally the system roles are not used for classifying documents. Therefore, you can hide the system roles in the classification dialogue box. To hide the system roles, complete the following steps [9, 2]:

1. Select the tab "Settings - General" in the Settings dialogue box.

2. Activate the function "Hide System Roles in classification dialogue box" by setting a check mark in this row.

3. Click "Apply" to save the process in the Settings dialogue box.

6.4.1.3 Maximum File Size for Preview

For PDF files ecoDMS displays a document preview. Depending on the file size, loading the images may take a while. Here you can enter the maximum file size for the automatic preview. Files exceeding this size must be opened manually in the preview window [9, 2]:

1. Select the "Settings - General" tab.

2. Enter the maximum file size for the preview.

3. Save the process by clicking "Apply" in the Settings dialogue box.

6.4.1.4 Client Design

You can edit the design of the ecoDMS client. Any changes are stored on the server and are applied to all users.

6.4.1.4.1 Change Client Colour   If you enable the "Modern Theme", you can change the layout colour.

1. Click the coloured box in the "Layout Colour" area.

2. Select the colour and confirm your selection with "OK".

    a) Click "Reset" to restore the original colour setting (ecoDMS blue).

3. Save the process by clicking "Apply" in the Settings dialogue box.

6.4.1.4.2 Use Old Design   The default layout of the ecoDMS client is a flat, modern "Material Design". To apply he "old design", complete the following steps:

1. Disable the setting "Modern Theme".

2. Save the process by clicking "Apply" in the Settings dialogue box.

6.4.1.5 Use HTTP Hyperlinks

ecoDMS has a link function. You can use it to send folder and document links to other ecoDMS users and/or copy them to the clipboard. To display the links as HTTP hyperlink, complete the following steps [9, 2]:

1. Select the tab "Settings - General" in the Settings dialogue box.

2. Activate the function "Use HTTP Hyperlinks" by setting a check mark in this row.

3. Click "Apply" to save the process in the Settings dialogue box.

6.4.1.6 E-Mail - Define and Use Default Client

To send documents, ecoDMS uses the email programme that was set as a default. Some email clients do not support this function. Therefore, there is an option for storing a syntax to call any email client from which you want to send documents out of ecoDMS. This email client then opens for all users as standard software for sending emails from ecoDMS. Complete the following steps [9, 2]:

1. Select the tab "Settings - General" in the Settings dialogue box.

2. Activate the function "E-Mail - Define and Use Default Client" by setting a check mark in this row.

3. Enter "Mail Client Command" **Example:**

```
"C:\Program Files (x86)\Mozilla Thunderbird\thunderbird.exe" -compose "subject=ecoDMS,
    attachment=%1"
```

4. Click "Apply" to save the process in the Settings dialogue box.

6.4.1.7 Display Resubmissions on Start

When you start ecoDMS, you can let ecoDMS display upcoming resubmissions. In this case a dialogue box opens which shows the user how many documents will reach or have reached the resubmission date. If this function is enabled, you can set the days until resubmission in a text entry box. If you enter, for example, 5, the resubmissions due within the next 5 days are displayed. On start the following message is displayed: "There are X documents available which reach the resubmission date.". To enable the feature [9, 2]:

1. Select the tab "Settings - General" in the Settings dialogue box.

2. Activate the function "Display Resubmissions on Start" by setting a check mark in this row.

3. Enter the period in the field "Days until Resubmission".

4. Click "Apply" to save the process in the Settings dialogue box.

6.4.2 File Indexing

Use this information dialogue box to request the current indexing status of the full text recognition. The following information are available [9]:

1. **Progress:** The percentage rate for the full text recognition of all archived documents in ecoDMS.

2. **Total Documents:** The number of total archived documents in ecoDMS.

3. **Proceeded Documents:** The number of already indexed documents.

4. **Remaining Documents:** The number of documents which are indexed not yet.

5. **Failed Documents:** The number of documents which cannot be indexed because they are, for example, unreadable or defective.

To refresh the display, click "Reload Display".
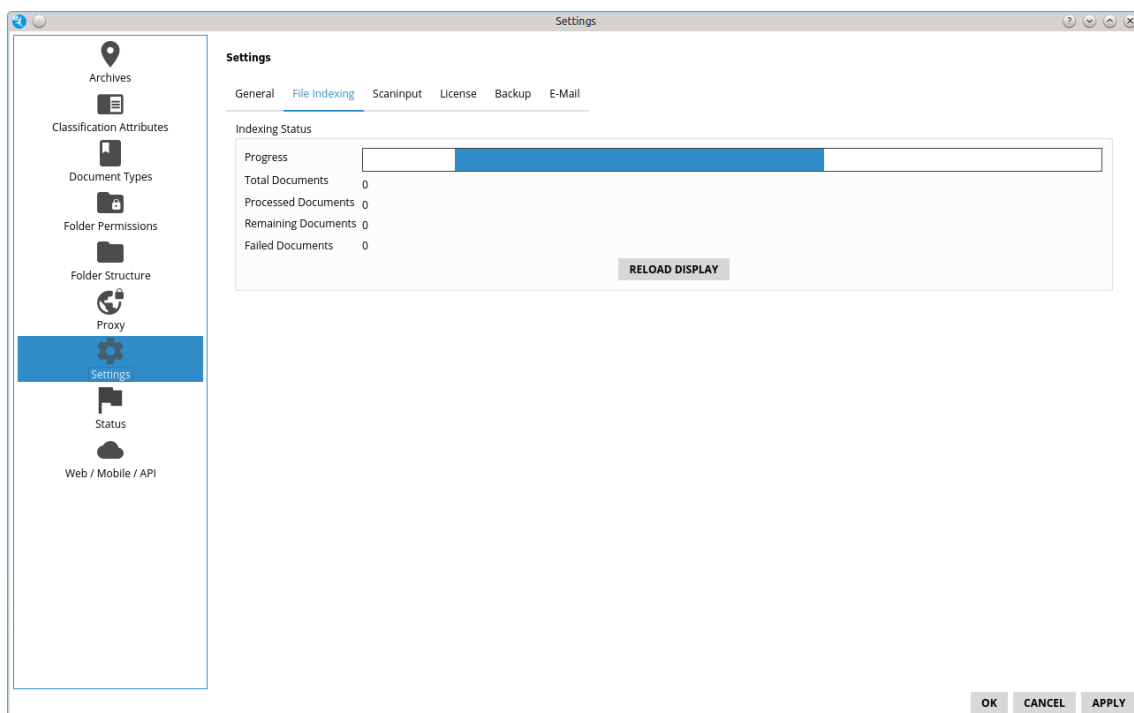
Figure 6.7: Settings - Settings - File Indexing

6.4.3 Scaninput

Please refer to the chapter "Inbox" in this manual.

6.4.4 License

Please refer to the chapter "Activate License" in this manual.

6.4.5 Backup

Please refer to the chapter "Backup (Data Backup)" in this manual.

6.4.6 E-Mail

To send emails from the system, make the following email settings (SMTP settings) on the "Email" tab.

1. **Server:** Enter the name of your email server for outbound mail (SMTP). For example:

   ```
   demoserver
   ```

2. **Port:** Enter the port of your server for outbound mail (SMTP). For example:

   ```
   25
   ```

3. **Security:** Select which connection security you are using. The following options are available:

   ```
   STARTTLS
   SSL/TLS
   None
   ```

4. **User name:** Enter the user name for the email account. For example:

   ```
   sampleuser
   ```

5. **Password:** Enter the user password. For example:

   ```
   12345
   ```

6. **Sender:** Enter the email address which you would like to use as sender of ecoDMS system messages. For example:

   ```
   sampleuser@demoserver.de
   ```

7. Click the "Test" button to test your settings.
   a) In this case a window opens. Enter the email recipient of the test message.
   b) If you enter the email information successfully, ecoDMS sends a test message to the specified recipient.

8. Save the process by clicking "Apply" in the Settings dialogue box.

6.5 Classification Attributes

The archived documents can be filed clearly in ecoDMS with important file information such as folder, document type and responsibility in a "digital record". This information is stored in so-called classification attributes. In addition to the default classification attributes, you can create your own attributes to set up ecoDMS to suit your needs.
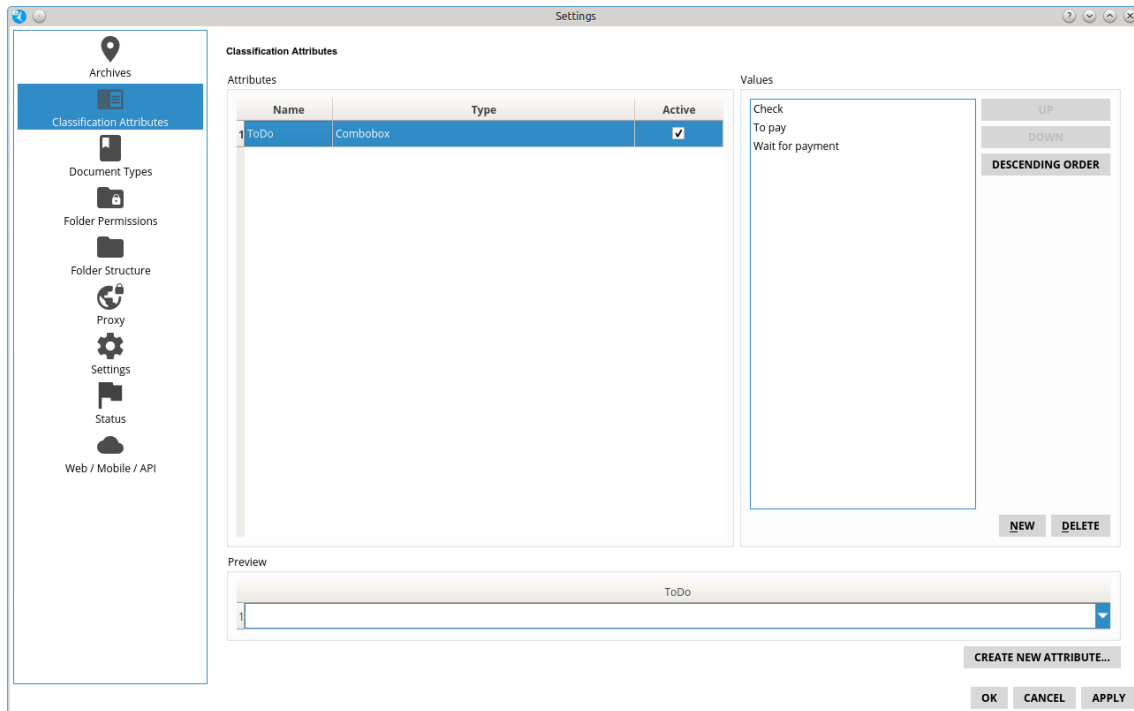
Figure 6.8: Settings - Classification Attributes

6.5.1 Create Attributes

There are several "attribute types" available for you to create your own classification attributes. Please note the following information: Once an attribute has been created, it cannot be deleted but it can be renamed, edited and/or disabled [9, 2].
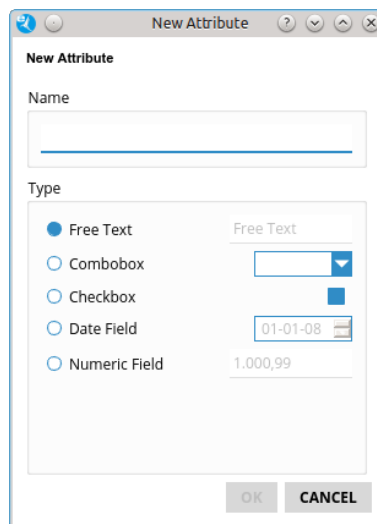
Figure 6.9: Settings - Classification Attributes - Create New Attribute

6.5.1.1 Free Text

The "Free Text" box allows you to enter numbers, letters and special characters. An example for this attribute is the already existing "Comment" box [9, 2].

1. Select the tab Classification Attributes in the Settings dialogue box.

2. Click the button "Create New Attribute".

3. A dialogue box opens. Enter a name for the attribute in the "Name" field.

4. Select "Free Text" in the "Type" area

5. Confirm your entry with "OK" or cancel the operation with "Cancel".
   a) The window is closed and the attribute you created is listed in a table in the "Attributes" area.

6. Click "Apply" to save the process in the Settings dialogue box.

6.5.1.2 Combobox

The "Combobox" enables you to assign fixed values, which are displayed as a selection list during classification. The Status attribute is an example for a "Combobox" [9, 2].
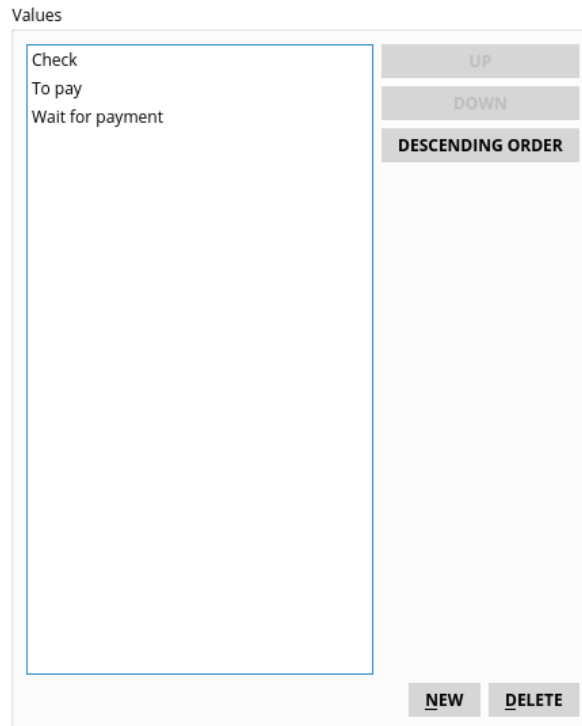
Figure 6.10: Settings - Classification Attribute - Combobox Values

1. Select the tab Classification Attributes in the Settings dialogue box.

2. Click the button "Create New Attribute".

3. A dialogue box opens. Enter a name for the attribute in the "Name" field.

4. Select "Combobox" in the "Type" area

5. Confirm your entry with "OK" or cancel the operation with "Cancel".
   a) The window is closed and the attribute you created is listed in a table in the "Attributes" area.

6. Select the attribute in the "Attribute" area.

7. Now click "New" in the "Values" area.

8. A new dialogue box. Enter the value name here.
   a) You can create any number of values.

9. Use the buttons "Up", "Down", "Descending" and "Ascending" to move the value positions up and down and sort the values in a specified order.

10. Click "Apply" to save the process in the Settings dialogue box.

6.5.1.2.1 Combobox: Sort Values The order of the values in a combobox created by the user can be changed as required [9, 2].

1. Select the tab Classification Attributes in the Settings dialogue box.

2. Select the attribute in the "Attribute" area.

3. Now you have the following options to sort the values.

    a) Now click "Ascending" in the "Values" area to sort the values in ascending order.

    b) Now click "Descending" in the "Values" area to sort the values in descending order.

    c) Select a value and move it with the button...

        i. "Up" in order upwards

        ii. "Down" in order downwards

4. Click "Apply" to save the process in the Settings dialogue box.

6.5.1.2.2 Combobox: Delete Values The values in a "Combobox" created by the user can be deleted if necessary. **To delete the values, make sure that no documents are assigned to these values** [9, 2].

1. Select the tab Classification Attributes in the Settings dialogue box.

2. Select the attribute in the "Attribute" area.

3. Select the value you want to delete in the "Value" area.

4. Click "Delete".

5. Click "Apply" to save the process in the Settings dialogue box.

6.5.1.3 Checkbox

The "checkbox" can be ticked during classification [9, 2].

1. Select the tab Classification Attributes in the Settings dialogue box.

2. Click the button "Create New Attribute".

3. A dialogue box opens. Enter a name for the attribute in the "Name" field.

4. Select "Checkbox" in the "Type" area

5. Confirm your entry with "OK" or cancel the operation with "Cancel".

    a) The window is closed and the attribute you created is listed in a table in the "Attributes" area.

6. Click "Apply" to save the process in the Settings dialogue box.

6.5.1.4 Date Field

With the "date field" you can create custom date fields for classification [9, 2].

1. Select the tab Classification Attributes in the Settings dialogue box.

2. Click the button "Create New Attribute".

3. A dialogue box opens. Enter a name for the attribute in the "Name" field.

4. Select "Date Field" in the "Type" area

5. Confirm your entry with "OK" or cancel the operation with "Cancel".

    a) The window is closed and the attribute you created is listed in a table in the "Attributes" area.

6. Click "Apply" to save the process in the Settings dialogue box.

6.5.1.5 Numeric Field

The attribute "Numeric field" is a field where you can enter only numeric values (numbers). Valid characters for the input depend on the selected country settings on the operating system [9, 2].

1. **Default settings for German:** Numbers and a maximum of 1 decimal point per entry are allowed as values.
   a) If a number is entered, for example, with a dot as 1000 separator, the dot will be removed from the system when saving.
   b) Input: 1.000.000,00 = Output: 1000000,00

2. **Default settings for English:** Numbers and a maximum of 1 dot per entry are allowed as values.
   a) If a number is entered, for example, with a decimal point as 1000 separator, the decimal point will be removed from the system when saving.
   b) Input: 1.000.000,00 = Output: 1000000.00

To create a "Numeric Field":

1. Select the tab Classification Attributes in the Settings dialogue box.

2. Click the button "Create New Attribute".

3. A dialogue box opens. Enter a name for the attribute in the "Name" field.

4. Select "Numeric Field" in the "Type" area

5. Confirm your entry with "OK" or cancel the operation with "Cancel".
   a) The window is closed and the attribute you created is listed in a table in the "Attributes" area.

6. Click "Apply" to save the process in the Settings dialogue box.

6.5.2 Enable / Disable Attributes

Attributes that are no longer needed cannot be deleted. However, they can be deactivated so that they are not displayed when classifying. Default attributes, on the other hand, cannot be deactivated. This function is only available for user-defined classification attributes. Complete the following steps [9, 2]:

1. Select the tab Classification Attributes in the Settings dialogue box.

2. Select the attribute in the "Attribute" area.
   a) **Activated:** Put a check mark in the column "Activated" to activate and enable it for classification.
   b) **Disabled:** Remove the check mark in the column "Activated" to disable it, so it will not be displayed for classification.

3. Click "Apply" to save the process in the Settings dialogue box.

6.5.3 Rename Attributes

Custom Classification attributes can be renamed. To do this, complete the following steps[9, 2]:

1. Select the tab Classification Attributes in the Settings dialogue box.

2. Select the attribute in the "Attribute" area with a double click on the name.

3. Enter the new name for the "Attribute".

4. Click "Apply" to save the process in the Settings dialogue box.

6.6 Folder Permissions

To ensure that the documents can only be viewed and edited by the person who is responsible and authorised, ecoDMS offers the assignment of separate access permissions for each file and each existing folder. This ensures the privacy of documents. Within the folder structure, you can define access permissions for each folder you create. In addition, you can assign permissions for single documents via the classification dialogue box.
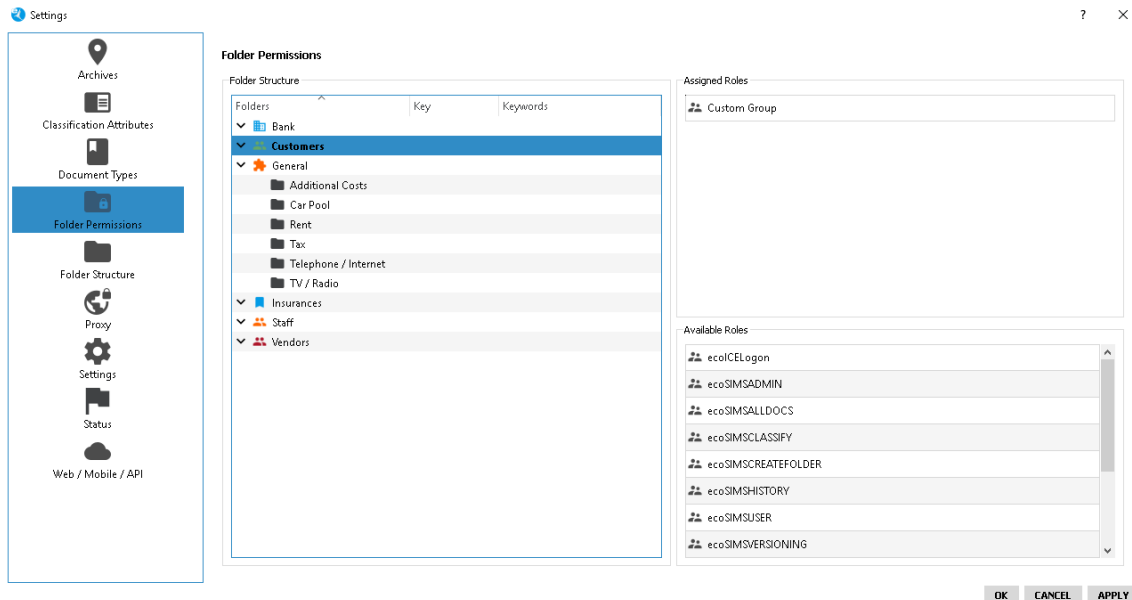
Figure 6.11: Settings - Folder Permissions

6.6.1 Important Information

When assigning folder permissions, please note the following:

1. Roles (users, groups) who do not have a permission for a folder cannot see or access the folder and the documents it contains, nor can they archive folders there.

2. Within the hierarchy, the folder permissions have priority over the document permissions, and you can add more access rights via the document classification.

3. If a folder does not have permissions, it is automatically visible to all roles (users, groups).

4. If you assign a permission to a main folder, the permission is automatically transferred to all its existing and future subfolders.

5. The permissions of each individual main or subfolder can be adjusted as necessary and must not be identical.

6. If a user has the "ecoSIMSAdmin" role, he will see the folder in the folder structure but not the contents of this folder.

7. If a folder has a permission, then the "Scanner" role should also be enabled for this folder. Otherwise the classification templates - depending on the folder permission - for scanned documents in the Inbox may not access the required folder for security reasons.

6.6.2 Assign Folder Permissions

If you want to assign specific users and / or groups on folders, complete the following steps [9, 2, 10]:

1. Select the "Folder Permissions" tab in the Settings dialogue box.

2. Select the required folder in the Folder Structure area.

3. Drag and drop the appropriate "roles" from the "Available Roles" area into the "Assigned Roles" area.

4. You can repeat this operation for other folders.

    a) Each time you change folders, the system prompts you to save your settings.

    b) Confirm the message with "Yes" or cancel the operation with "No".

5. Click "Apply" in the Settings dialogue box to save the operation.

6.6.3 Remove Folder Permissions

If you have assigned on a folder specific users and / or groups, you can remove them as follows[9, 2, 10]:

1. Select the "Folder Permissions" tab in the Settings dialogue box.

2. Select the required folder in the Folder Structure area.

3. Drag and drop the appropriate "roles" from the "Assigned Roles" area into the "Available Roles" area.

4. You can repeat this operation for other folders.

    a) Each time you change folders, the system prompts you to save your settings.

    b) Confirm the message with "Yes" or cancel the operation with "No".

5. Click "Apply" in the Settings dialogue box to save the operation.

6.6.4 User Example

Case 1:

1. The "Accounting" role (group) is assigned to the "Test Company" folder.

2. The "Accounting" role consists of users "Peter Smith", "John Doe" and "Sandy Sample".

3. The user "Peter Smith" archives a document with the following classification:

    a) Folder: Test Company

    b) Document type: Incoming invoices

    c) Status: ToDo

    d) Permissions: For classify by all users

Explanation for case 1:

1. As the folder has a permission for the "Accounting" role (group), the archived document is now visible and for classification by all 3 members of the role.

2. Other users, which are not part of the role (group) "Accounting", can neither see the folder nor the document.

Case 2:

1. The "Accounting" role (group) is assigned to the "Test Company" folder.

2. The "Accounting" role consists of users "Peter Smith", "John Doe" and "Sandy Sample".

3. The user "Peter Smith" archives a document with the following classification:

    a) Folder: Test Company

    b) Document type: Incoming invoices

    c) Status: ToDo

    d) Permissions: For classify for "Peter Smith"

Explanation for case 1:

1. As the folder has a permission for the "Accounting" role (group) and "Peter Smith" is part of this role, he may view and classify the document.

2. The user "John Doe" and "Sandy Sample" may also access the folder, but cannot see the document archived by "Peter Smith", as only he received a permission for the document in the classification.

3. Other users, which are not part of the "Accounting" role (group), can neither view the folder nor the document.

6.7 Folder Structure

Using archiving software changes the familiar folder structure. In a file system, customer folders often contain subfolders for Invoices, Offers, etc. This "complicated" structure is no longer necessary here. The previous sub folders are created in ecoDMS as document types. The folder structure therefore contains only main folders. The sub categories are created when classifying with the Document Type attribute.

Here you create the Folder Structure. ecoDMS differentiates between main folders and subfolders.

- We recommend you create a flat and simple structure.

- Create as few folders as possible.

- Use the advantages of the integrated document classification.

- Take care not to confuse subfolders with document types.
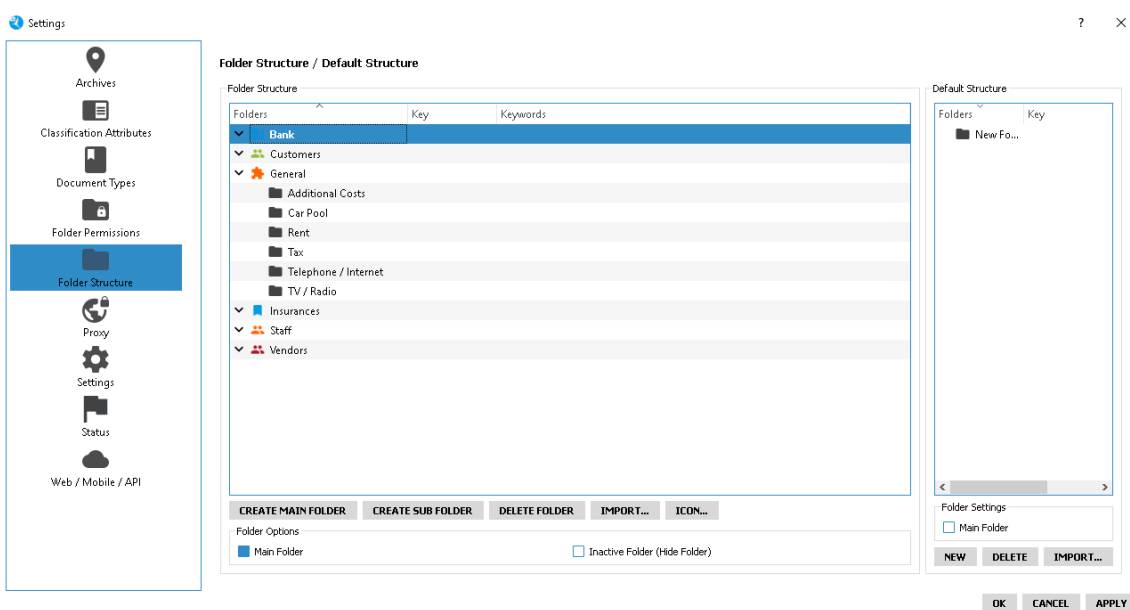
Figure 6.12: Settings - Folder Structure

6.7.1 Create Main Folder

You can assign further folders to a main folder. Moreover, all main folders are assigned and displayed automatically during Classification. You can also create folders directly through the classification dialogue box or the folder structure if you have the according permission. Each folder that is marked as a main folder is displayed in the Main Folder column during classification. The folders you created cannot be moved within the folder structure [9, 2].

1. Select the tab Folder Structure in the Settings dialogue box.

2. Click the button "Create Main Folder".

3. A dialogue box opens. Enter the following information:

   a) **Name:** Enter a folder name.

   b) **Key:** Optionally, you can assign a folder key. It is an alpha-numeric field. Examples for keys are folder number, customer number or something similar.

   c) **Keywords:** Optionally, you can assign keywords. It is an alpha-numeric field. Keywords can have different meanings in the system:

      i. By using keywords, you can find and assign folders more quickly. Possible keywords are, for example, address details, project information, a VAT-ID or the like. When searching for folders, you can also use keywords.

ii. Keywords also serve as an extension of the automatic assignment (pre-classification) of folders. If a document is scanned and archived with the PDF/A Printer or via an Office Plugin, and no template is recognised, the document can still be assigned to the respective folder via the keywords.

iii. All deposited keywords must be complete and written consistently throughout the document! Use unambiguous terms, e.g. the VAT-ID of a company or customer number. Enter keywords without a hyphen or a comma. The recorded words are " and" -linked. For the detection, all detected items must be included in the document in the same notation.

d) **Skip to new folder:** Activate this command to mark the folder after saving the setting dialog box. Then the folder is already selected for the creation of subfolders.

4. Confirm your entry with "OK" or cancel the operation with "Cancel".

a) After saving, the folder is selected as "Main Folder" in the "Folder Options" area..

5. Click "Apply" to save the process in the Settings dialogue box.
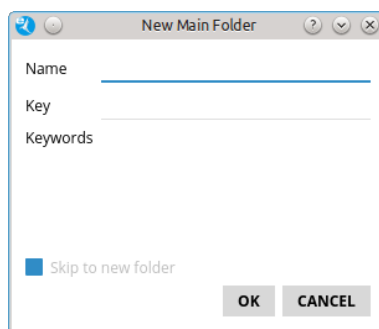
Figure 6.13: Settings - Folder Structure - Create Main Folder

6.7.2 Convert Folder to Main Folder

You can turn an existing folder, which was not created as a main folder, into a main folder. If this folder already contains documents, the classification will not be changed because of revision secure. To apply the change to existing classifications, they must be reclassified manually [9, 2].

1. Select the tab Folder Structure in the Settings dialogue box.

2. Select the folder in the Folder Structure area.

3. Enable "Main Folder" in the "Folder Options" area.

4. Click "Apply" to save the process in the Settings dialogue box.

6.7.3 Create Subfolder

You can select subfolders in the folder structure as filing destination during classification. The system automatically recognises the associated main folder. You can also create folders directly through the classification dialogue box or the folder structure if you have the according permission. The folders you created cannot be moved within the folder structure. [9, 2].

1. Select the tab Folder Structure in the Settings dialogue box.

2. Select the folder where you want to create sub folders in the Folder Structure.

3. Click the button "Create Sub Folder".

4. A dialogue box opens. Enter the following information:

a) **Name:** Enter a folder name.

b) **Key:** Optionally, you can assign a folder key. It is an alpha-numeric field. Examples for keys are folder number, customer number or something similar.

c) <u>**Keywords:**</u> Optionally, you can assign keywords. It is an alpha-numeric field. Keywords can have different meanings in the system:

    i. By using keywords, you can find and assign folders more quickly. Possible keywords are, for example, address details, project information, a VAT-ID or the like. When searching for folders, you can also use keywords.

    ii. Keywords also serve as an extension of the automatic assignment (pre-classification) of folders. If a document is scanned and archived with the PDF/A Printer or via an Office Plugin, and no template is recognised, the document can still be assigned to the respective folder via the keywords.

    iii. All deposited keywords must be complete and written consistently throughout the document! Use unambiguous terms, e.g. the VAT-ID of a company or customer number. Enter keywords without a hyphen or a comma. The recorded words are " and " -linked. For the detection, all detected items must be included in the document in the same notation.

d) <u>**Skip to new folder:**</u> Activate this command to mark the folder after saving the setting dialog box. Then the folder is already selected for the creation of subfolders.

5. Confirm your entry with "OK" or cancel the operation with "Cancel".

6. Click "Apply" to save the process in the Settings dialogue box.
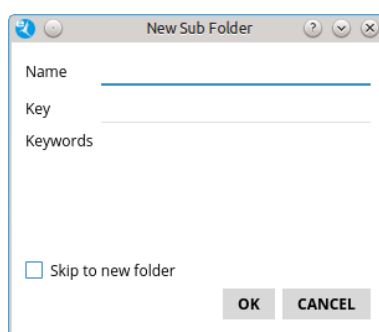
Figure 6.14: Settings - Folder Structure - Create Sub Folder

6.7.4 Rename Folder

Folders can be renamed if necessary. A change of the name is not recommended. The change takes effect for existing classifications. Complete the following steps [9, 2]:

1. Select the tab Folder Structure in the Settings dialogue box.

2. Select the folder you want to rename in the Folder Structure area with a double click in the "Folder" column.

3. Enter the new name.

4. Click "Apply" to save the process in the Settings dialogue box.

6.7.5 Change Key

Keys can be changed if necessary. Complete the following steps [9, 2]:

1. Select the tab Folder Structure in the Settings dialogue box.

2. Select the key you want to change in the Folder Structure area with a double click in the "Key" column.

3. Enter the new key.

4. Click "Apply" to save the process in the Settings dialogue box.

6.7.6 Change Keywords

Keywords can be changed if necessary. Complete the following steps [9, 2]:

1. Select the tab Folder Structure in the Settings dialogue box.

2. Select the keywords you want to change in the Folder Structure area with a double click in the "Keywords" column.

3. Enter the new keywords.

4. Click "Apply" to save the process in the Settings dialogue box.

6.7.7 Delete Folder

You can delete folders if they do not contain any documents and/or subfolders [5, 9, 2].

1. Select the tab Folder Structure in the Settings dialogue box.

2. Select the folder you want to delete in the Folder Structure area.

3. Click "Delete Folder".

4. Click "Apply" to save the process in the Settings dialogue box.

6.7.8 Import a Folder Structure

You can import an existing folder structure as an XML file [9, 2].

1. Select the tab Folder Structure in the Settings dialogue box.

2. Click the "Import" button in the Folder Structure area.

3. Select the XML file and open it.

4. Click "Apply" to save the process in the Settings dialogue box.

6.7.8.1 Valid XML Items

1. name (folder name)

2. key (e.g. a customer number)

3. buzzwords (keywords)

   If an entry does not contain a value, the value is automatically empty.

If you want to declare specific folders as main folders, use the Settings dialogue box to assign the folders manually after importing them.

6.7.8.2 XML Sample

```xml
<?xml version="1.0" encoding="UTF-8"?>
    <ecoDMSFolders>
        <folder name="Folder 01">
            <folder name="Subfolder 01" key="123456" buzzwords="Keywords"></folder>
            <folder name="Subfolder 02" key="234567" buzzwords="Keywords"></folder>
            <folder name="Subfolder 03" key="345678" buzzwords="Keywords"></folder>
        </folder>
        <folder name="Folder 02">
            <folder name="Subfolder 01a"></folder>
            <folder name="Subfolder 02a"></folder>
            <folder name="Subfolder 03a"></folder>
        </folder>
    </ecoDMSFolders>
```

6.7.9 Assign an Icon

You can replace the default icon (green flag) for each folder with a custom icon. This allows a better overview for the user [9, 2, 3].

1. Select the folder in "Settings - Folder Structure".

2. Click the Icon button.

3. Select the path you want and confirm your choice with "Open".

    a) The following file formats are possible: *.png, *.jpg, *jpeg, *.bmp, *.ico

    b) It is recommended to use square icons (eg, 16x16px, 32x32px, 64x64px ...).

    c) ecoDMS does not contain an icon collection, but you can select custom icons from your own collection.

4. Click "Apply" to save the process in the Settings dialogue box.

6.7.10 Inactive Folder (Hide Folder)

Folders that are not being used or are not needed can be hidden for all users. The inactive folders are not visible for users [9, 2].

1. Select the tab Folder Structure in the Settings dialogue box.

2. Select the folder in the Folder Structure area.

3. Enable "Inactive Folder (Hide Folder)" in the "Folder Options" area.

4. Click "Apply" to save the process in the Settings dialogue box.

6.7.11 Default Structure

A default structure is used to always create the same substructures for folders. Make sure that you do not confuse this function with the function to create document types. "Offers" and "Invoices", for example, are not sub folders but document types. We recommend you create a flat and simple structure. Example:

1. You want to create a Customers main folder in ecoDMS. All customers should be listed below this folder.

2. For each customer you simultaneously want to create a fixed substructure. The substructure is the same for each customer.

3. To save you from creating such a substructure for each customer from scratch, the structure can be defined in a default structure.

6.7.11.1 Create a New Folder in the Default Structure

To create a new folder in the Default Structure, complete the following steps [9, 2]:

1. Select the tab Folder Structure in the Settings dialogue box.

2. In the Folder Structure, select the folder / main folder below which you want to create the "default structure".

3. Click "New" in the "Default structure" area

    a) A folder is automatically created.

    b) Create a default structure with any number of folders

    c) If you want to declare a folder as a "main folder" in the default structure, check the "Main Folder" checkbox.

    d) The structure can contain any number of main folders and subfolders.

4. Click "Apply" to save the settings

5. Now create your new structure for the folder you selected in the folder structure

    a) The new folders automatically contain the default structure you created

6. Click "Apply" to save the process in the Settings dialogue box.

6.7.11.2 Import a Default Structure

You can import an existing default folder structure as an XML file [9, 2]:

1. Select the tab Folder Structure in the Settings dialogue box.

2. Click the "Import" button in the "Default Folder Structure" area.

3. Select the XML file and open it.

4. Click "Apply" to save the process in the Settings dialogue box.

6.7.11.2.1 Valid XML Items

1. name (folder name)

2. key (e.g. a customer number)

3. buzzwords (keywords)

   If an entry does not contain a value, the value is automatically empty.

If you want to declare specific folders as main folders, use the Settings dialogue box to assign the folders manually after importing them.

6.7.11.2.2 XML Sample

```xml
<?xml version="1.0" encoding="UTF-8"?>
    <ecoDMSFolders>
        <folder name="Folder 01">
            <folder name="Subfolder 01" key="123456" buzzwords="Keywords"></folder>
            <folder name="Subfolder 02" key="234567" buzzwords="Keywords"></folder>
            <folder name="Subfolder 03" key="345678" buzzwords="Keywords"></folder>
        </folder>
        <folder name="Folder 02">
            <folder name="Subfolder 01a"></folder>
            <folder name="Subfolder 02a"></folder>
            <folder name="Subfolder 03a"></folder>
        </folder>
    </ecoDMSFolders>
```

6.7.11.3 Delete Folder from Default Structure

You can delete folders if they do not contain any documents and/or subfolders [5, 9, 2].

1. Select the tab Folder Structure in the Settings dialogue box.

2. Select the folder in the "Default structure".

3. Click "Delete".

4. Click "Apply" to save the process in the Settings dialogue box.

6.8 Proxy

If you have enabled a Proxy in your network, you can also use this for ecoDMS as an option. A Proxy is a communication interface in a network. It is the interface for data transfer between two communication partners. As a rule, a Proxy is used when the actual server is to be placed in a secured network and access from outside is restricted to the Proxy.

Please note that the following settings can be saved in ecoDMS, but cannot yet be used by the system. The proxy function is not yet available in this version.

To enable the Proxy for ecoDMS, complete the following steps [9, 2]:

1. Select the Proxy tab in the Settings dialogue box.

2. Enable the "Use Proxy" checkbox.

3. Enter the following information in the "Proxy Settings" area:

   a) **Proxy:** Enter the IP address or the DNS name of the Proxy.

   b) **Port:** Here you enter the associated Port number.

4. As an option, you can enter the login information to authenticate the Proxy.

   a) **User Name:** Enter the user name.

   b) **Password:** Enter the matching password here.
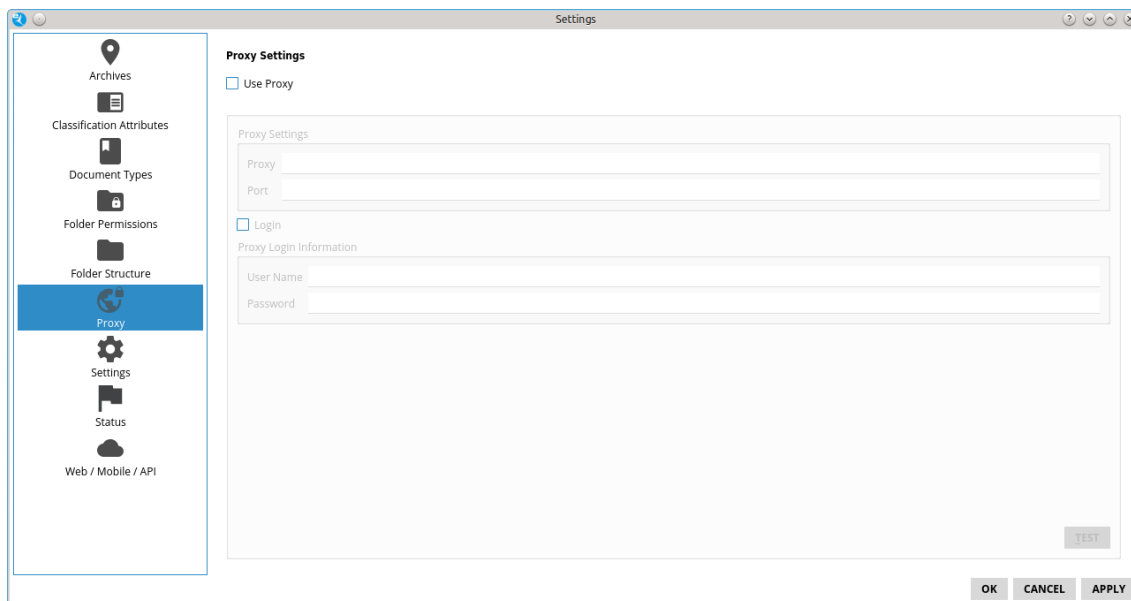
Figure 6.15: Settings - Proxy (Function is currently disabled)

6.9 Status

A status provides information about the processing status of a document. Moreover, you can execute a manual ad-hoc workflow using the status. If, for example, the status "To Do" is assigned to a document, which is then handed over to a user group / person, the employee responsible will recognise from the status that the document needs processing. Once the document has been processed, the status can be changed to "Done", for example. There are three types of document status. These cannot be deleted but they can be renamed. You can find more information on statuses in the chapter on "Classifications".

– Done

– Resubmission

– To Do

Tip: Do NOT assign new "statuses" such as "Check", "Pay", "Book", "Sign", etc. Create such "To Dos" as "tasks" in a separate "classification attribute". Then you can, for example, assign the "To Do" status and, in addition, allocate the associated tasks. This makes filtering documents much easier and helps you to make optimal use of the system. A task should therefore not be a Status.
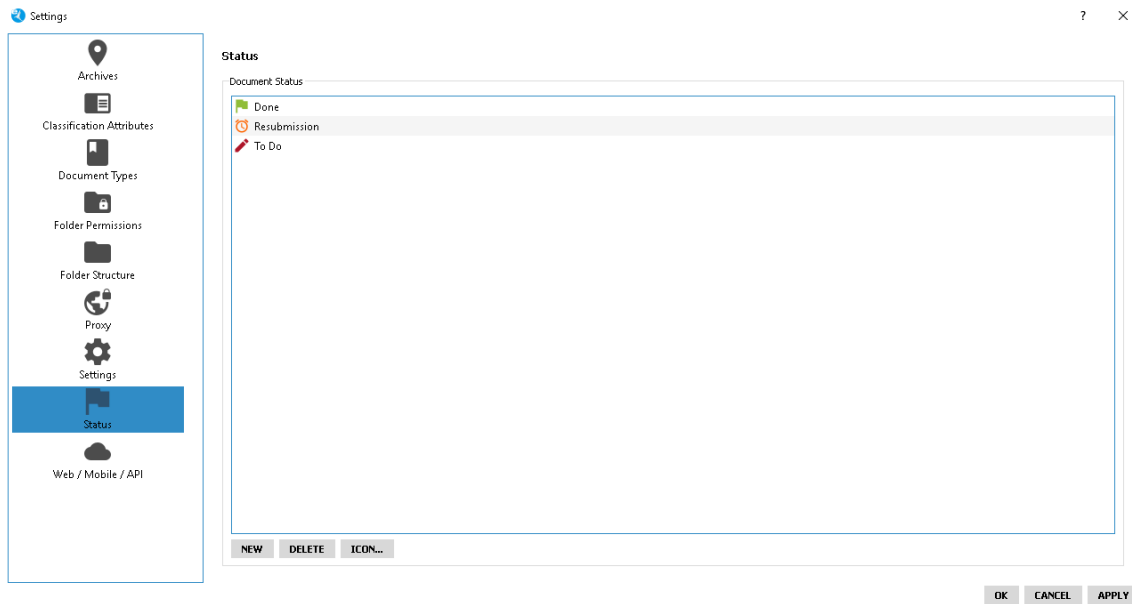
Figure 6.16: Settings - Status

6.9.1 Create a New Status

To create a new Status, complete the following steps [9, 2]:

1. Select the tab Status in the Settings dialogue box.

2. Click the "New" button

3. Click in to the field "New Status".

4. Overwrite the entry with your custom name.

5. Repeat this process to create more "document types".

6. Click "Apply" to save the process in the Settings dialogue box.

6.9.2 Rename Status

If necessary, you can rename a status. A name change of the default status is not recommended[9, 2].

1. Select the tab Status in the Settings dialogue box.

2. Select the Status.

3. Overwrite the entry with your custom name.

4. Repeat this process to create more "document types".

5. Click "Apply" to save the process in the Settings dialogue box.

6.9.3 Delete Status

You can delete status if they do not contain any documents [9, 2].

1. Select the tab Status in the Settings dialogue box.

2. Click the "Delete" button

3. Repeat this process to delete more Status.

4. Click "Apply" to save the process in the Settings dialogue box.

6.9.4 Assign an Icon

You can replace the default icon (flag) for each status with a custom icon. This allows a better overview for the user [9, 2, 3].

1. Select the folder in "Settings - Status".

2. Click the Icon button.

3. Select the path you want and confirm your choice with "Open".
    a) The following file formats are possible: *.png, *.jpg, *jpeg, *.bmp, *.ico
    b) It is recommended to use square icons (eg, 16x16px, 32x32px, 64x64px ...).
    c) ecoDMS does not contain an icon collection, but you can select custom icons from your own collection.

4. Click "Apply" to save the process in the Settings dialogue box.

6.10 Web - Mobil - API

You can access the archive from different ways.

6.10.1 Web Access

With the web interface, documents can be requested from various internet browsers. The Web Client looks very much like the desktop client. To use the web interface, the web service has to be started by the administrator via the settings dialogue box in ecoDMS. The Web Client allows reading and writing access to the archive and includes usual ecoDMS functions like archiving and classifying [9, 8, 6].

This manual describes the options and functions in the chapter "Web Access & Web Interface".
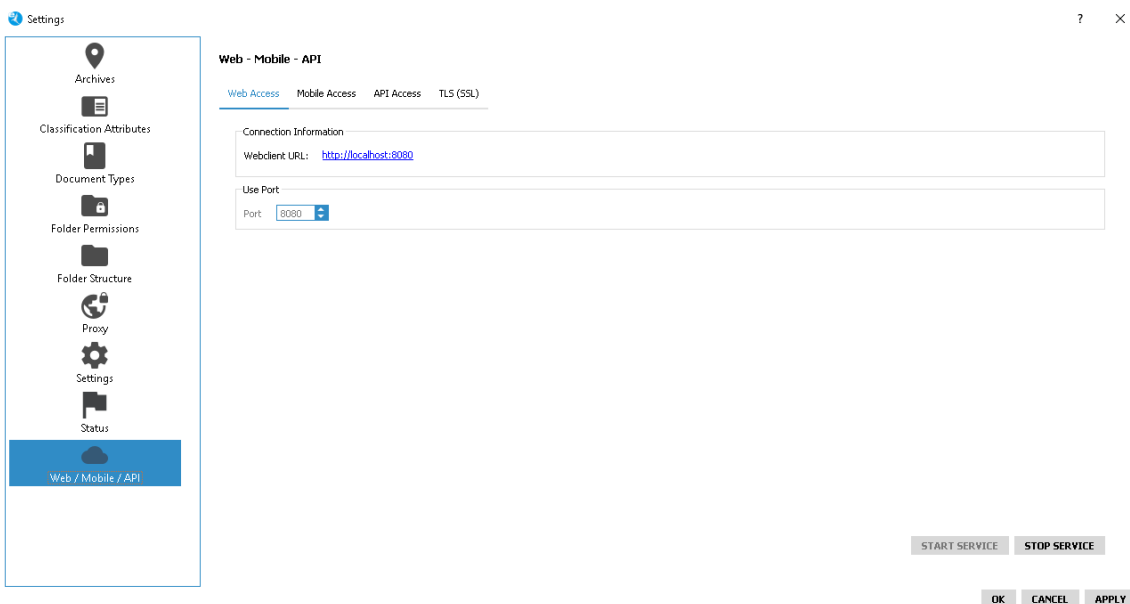
Figure 6.17: Settings - Web Access

6.10.2 Mobile Access

Use the ecoDMS mobile app to search for (full text search), request, view (preview for PDF files), download archived documents and archive documents with a smart phone or tablet. The ecoDMS mobile service facilitates access [9, 8, 12, 7].

This manual describes the options and functions in the chapter "Mobile Access & ecoDMS Mobile Apps".
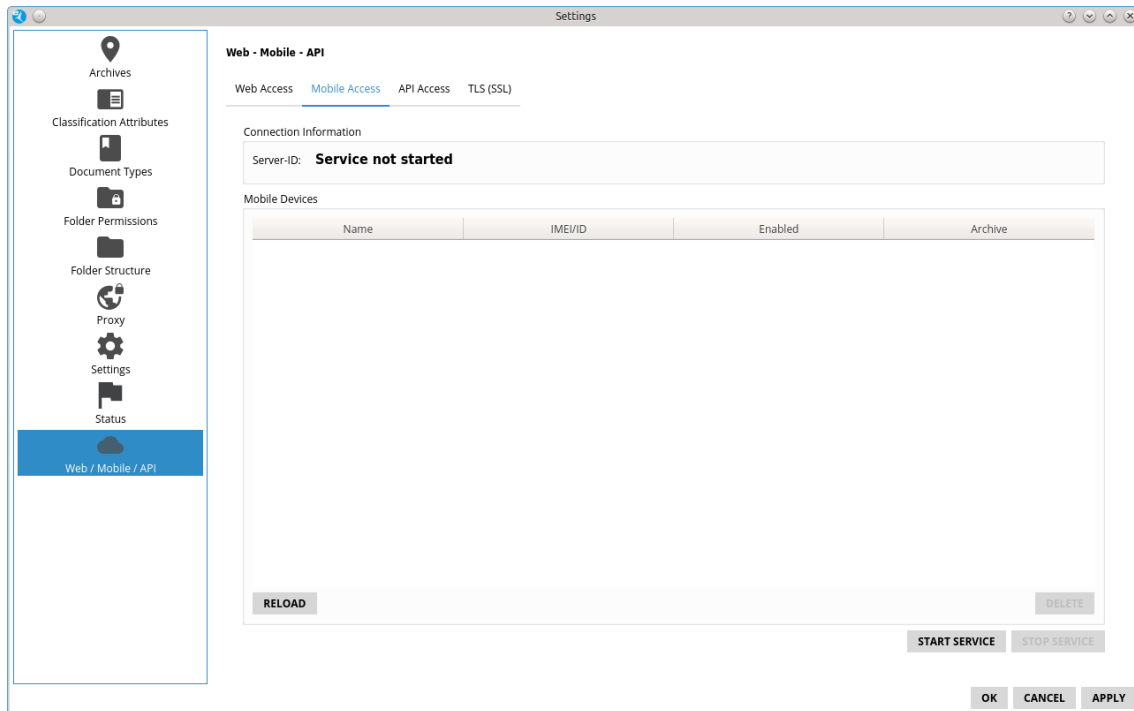
Figure 6.18: Settings - Mobile Access

6.10.3 API Access

An interface is available if users want to create their own scripts for customisation. The ecoDMS API Rest Service allows users to connect any third-party system. Users can thus connect CRM or ERP systems or other external programmes by programming the interface. The fundamental functions of the ecoDMS Server, such as "archive", "classify", or "download", can be accessed via the API. The individual functions are accessed via the REST web services. This provides each function with a unique address which is expressed as a URL and which can be used, among others, in internet browsers [9, 4].

The manual "ecoDMS API Rest Service (Interface)" describes the configuration and functions.
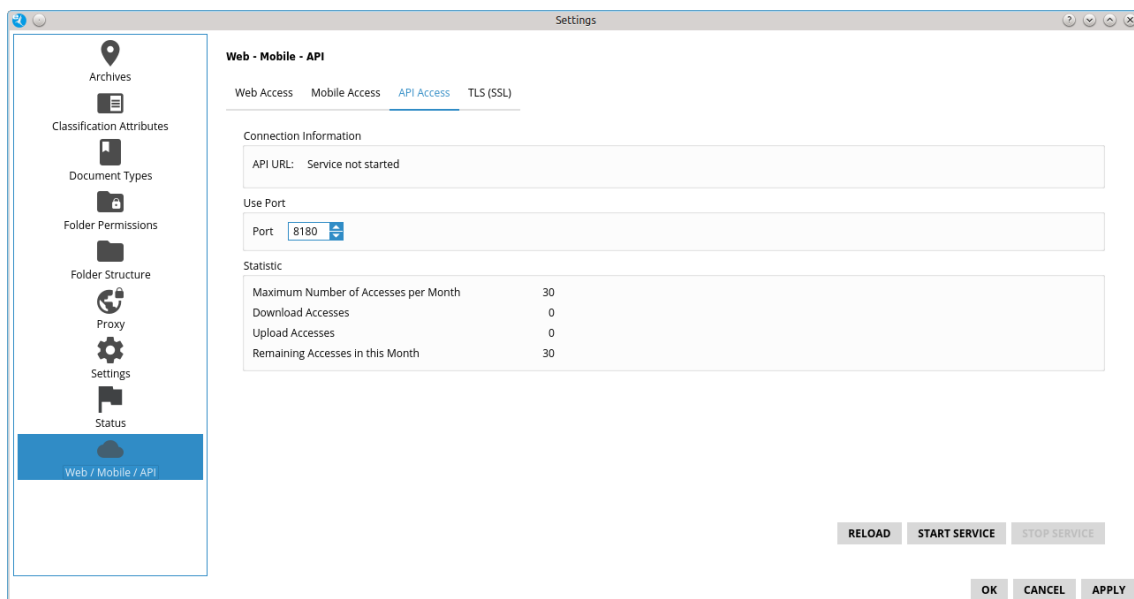
Figure 6.19: Settings - API Access

6.10.4 TLS (SSL)

TLS means Transport Layer Security. This term is better known under the previous name Secure Sockets Layer (SSL). It is an encryption protocol for secure data transmission in the Internet. The SSL protocol is being developed and standardised for version 3.0 under the new name TLS. Version 1.0 of TLS is the same as version 3.1 of SSL. Access to the web interface and API can be done TLS (SSL) encrypted [9].
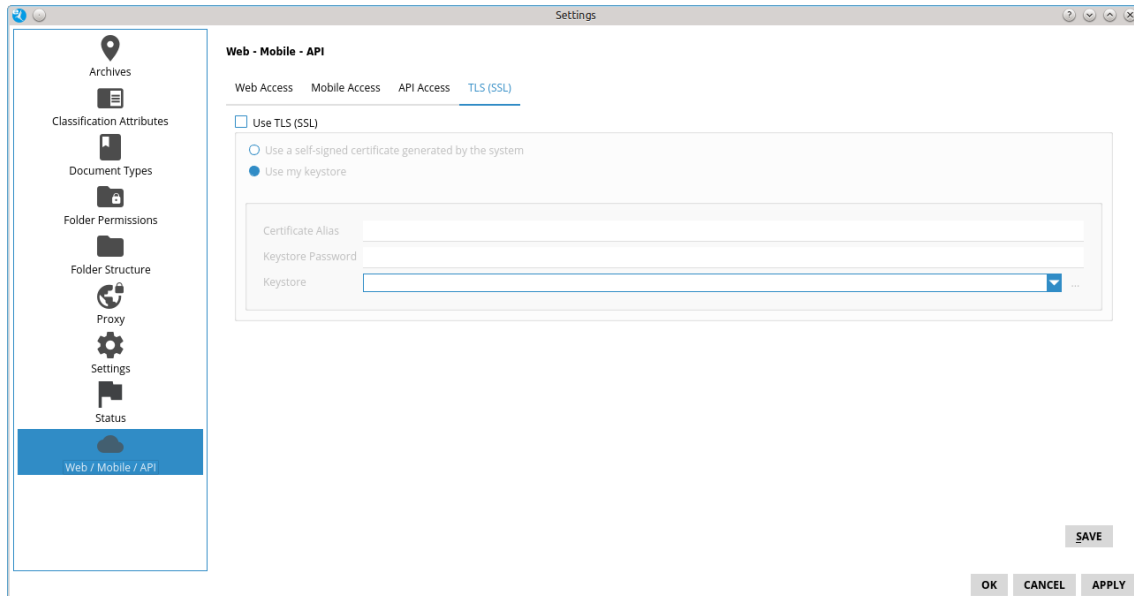
Figure 6.20: Settings - TLS (SSL)

6.10.4.1 Use a Self-Signed Certificate Generated by the System

You need a certificate to use TLS (SSL). Either you can use a self-signed certificate generated by the system or use your own keystore. To use a self-signed certificate generated by the system, complete the following steps:

1. Select the tab "Web - Mobile - API -> TLS (SSL)" in the Settings dialogue box.

2. Enable the command "Use TLS (SSL)" with a check mark.

3. Click "Use a self-signed certificate generated by the system".

4. Click "Apply" to save the process in the Settings dialogue box.

6.10.4.2 Use My Keystore

You need a certificate to use TLS (SSL). Either you can use a self-signed certificate generated by the system or use your own keystore. To use your own keystore, complete the following steps:

1. Select the tab "Web - Mobile - API -> TLS (SSL)" in the Settings dialogue box.

2. Enable the command "Use TLS (SSL)" with a check mark.

3. Click "Use my keystore".

4. Enter the following information:

    a) **Certificate Alias:** Enter the name of the certificate.

    b) **Keystore Password:** Enter the keystore password.

    c) **Keystore:** The keystore for the TLS (SSL) encryption must be in the format JSSE (Java KeyStore). Here the keystore is uploaded and selected.

        i. Click the button "..." to select the keystore on your filesystem.

        ii. Confirm your selection and upload the keystore.

iii. Select the keystore from the list.

5. Click "Apply" to save the process in the Settings dialogue box.

6.10.5 Access from Outside

Please read the chapter "Connection Manger & Programme Start - Access from Outside".

Important Information for Chapter 6

[1]   *An archive is only used to separate documents within a server and is not an independent server. Because of that you cannot assign user-defined settings, structures, users, groups and/or permissions to archives.*

[2]   *Changes within the settings dialog and folder structure of ecoDMS are always valid for all users. The user must restart the client or click the icon "refresh desktop" to see the changes.*

[3]   *Currently ecoDMS does not contain any icon collection. Of course you can use your own icons in the supported formats. Free Icon Collections (example keyword: Open Source icons) are available on the Internet. Here, the license conditions and guidelines of the author/owner apply.*

[4]   *Each full license of ecoDMS automatically contains ten API connects per month that can be used for uploading and downloading documents via the API. You can purchase further API Connects if required in our Online Shop.*

[5]   *The status, folders and document types can only be deleted if no documents (including those in the trash) are assigned to them.*

[6]   *This feature requires a licence of the ecoDMS full version but can be tested during the time and is then automatically disabled until a full licence is activated.*

[7]   *This function requires a licence for the full version of ecoDMS (this function is not available in the trial and Free4Three Edition).*

[8]   *This function requires access to the Internet.*

[9]   *Viewing and using this function requires specific system permissions.*

[10] *We recommend you create and use user groups. This simplifies classification and assignment immensely.*

[11] *We recommend you store all documents in an archive. For this, the default archive is recommended. This simplifies the search and filing processes immensely. When archiving and searching for documents, you always use the current archive. If multiple archives are created, files can be moved to another archive if necessary.*

[12] *With each ecoDMS licence you purchase, you receive one "free" ecoDMS mobile access. If, for example, you have purchased an ecoDMS licence with 1 simultaneous connection to the archive, you can establish a connection via the connection manager (or, alternatively, via the API or the web client). At the same time, you can install the licence number on a smart phone or tablet. Then you can use a simultaneous connection (= 1 profile) on this device at the same time as a client access. If you wish to connect more mobile devices, profiles or clients with your ecoDMS licence, you require additional ecoDMS licences.*

7 Activate License

The purchased ecoDMS License is activated and managed by the administrator through the ecoDMS Settings dialogue box. On the License in the Settings area, you can display and manage your License information.
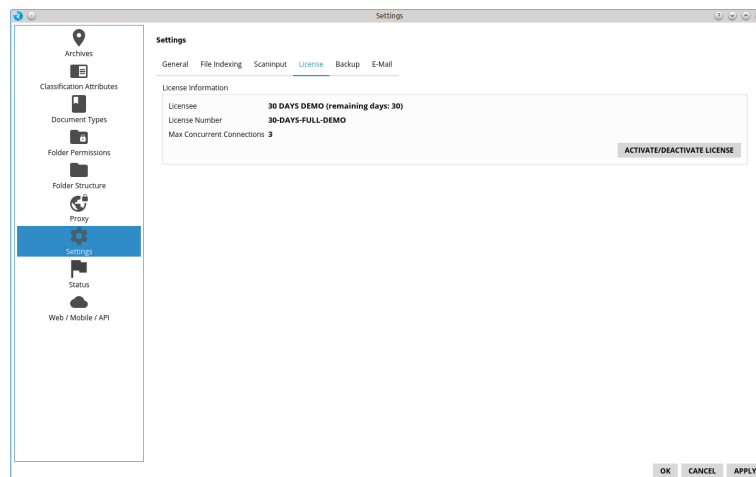
Figure 7.1: Settings - Settings - License (Here: Demo Version)
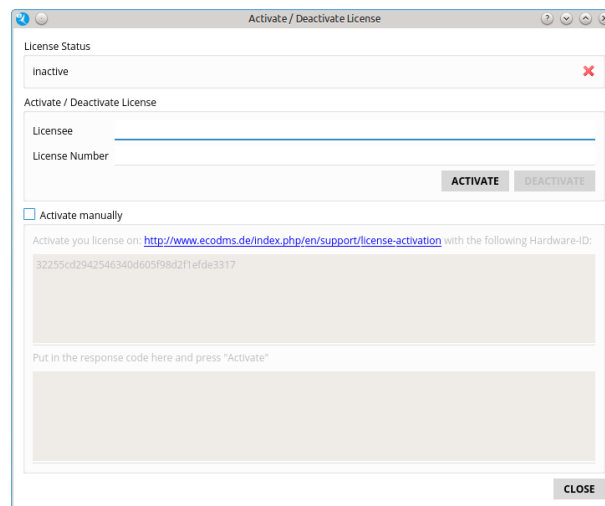
Figure 7.2: Settings- Settings - License Activation

7.1 Basics

- An ecoDMS license can always be activated on a server instance, to which it is then dedicated. Of course you can also install or migrate your purchased license to another server if required. This, however, requires prior deactivation. It is not possible to activate a license number more than once at a time.

- If changes are made to the server hardware (e.g. exchanging the hard disk), the license must be deactivated beforehand.

- If you cannot deactivate the license according to the instructions in the ecoDMS manual because, for example, you

did not deactivate your license as described above, you can request ecoDMS GmbH to reset (deactivate) your license. For this case the "Support" section of the ecoDMS website provides a free form.

7.2 Activate License via Settings Dialogue Box

The activation of a license is always permitted for one server instance. To activate the license for example for another server instance or after reinstallation you must first deactivate this license. To activate your license directly via the settings dialogue box, complete the following steps [4, 3, 2, 5, 1]:

1. Select the tab "Settings - License" in the Settings dialogue box.

2. Click "Activate License".

3. Enter your license information in the "Activate / Deactivate License" area.

    a) **Licensee:** Enter the licensee here. Make sure the spelling is correct. You received the name of the licensee via email after you purchased your license(s).

    b) **License Number:** Enter the license number here. Make sure the spelling is correct. You received the license number via email after you purchased your license(s).

4. Click "Activate".

    a) The license will be activated now.

5. Exit all ecoDMS programs and reconnect all connected profiles via the Connection Manager (Disconnect / Connect).

7.3 Activate License Extension via Settings Dialogue Box

To activate your license extension directly via the settings dialogue box, complete the following steps [4, 3, 2, 5, 1]:

1. Select the tab "Settings - License" in the Settings dialogue box.

2. Click "Activate License".

3. First, you must release the existing license to import your license extensions. This means that you need to deactivate the current license.

    a) Click the button "Deactivate".

4. Enter now your license information in the "Activate / Deactivate License" area.

    a) **Licensee:** Enter the licensee here. Make sure the spelling is correct. You received the name of the licensee via email after you purchased your license(s).

    b) **License Number:** Enter the license number here. Make sure the spelling is correct. You received the license number via email after you purchased your license(s).

5. Click "Activate".

    a) The license incl. the license extension(s) will be activated now.

6. Exit all ecoDMS programs and reconnect all connected profiles via the Connection Manager (Disconnect / Connect).

7.4 Activate License via Website

If your ecoDMS workplace (ecoDMS Client) does not have access to the internet, you can activate your ecoDMS license manually. To do this you must request a code via the ecoDMS Website. You can do this from any PC with Internet access. About the settings dialogue box, the activation can then be performed without access to the Internet. Complete the following steps [4, 2, 5, 1]:

1. Select the tab "Settings - License" in the Settings dialogue box.

2. Click "Activate License".

3. Enter your license information in the "Activate / Deactivate License" area.

    a) **Licensee:** Enter the licensee here. Make sure the spelling is correct. You received the name of the licensee via email after you purchased your license(s).

    b) **License Number:** Enter the license number here. Make sure the spelling is correct. You received the license number via email after you purchased your license(s).

4. Enable the field "Activate manually".

5. Note the displayed Hardware ID.

    a) for example: Copy it to Clipboard.

6. Enter the written address into your web-browser.

    a) www.ecodms.de -> Support -> License Activation

7. Now you must enter your license information and the hardware id.

    a) **Licensee:** Enter the licensee here. Make sure the spelling is correct. You received the name of the licensee via email after you purchased your license(s).

    b) **License Number:** Enter the license number here. Make sure the spelling is correct. You received the license number via email after you purchased your license(s).

    c) **Hardware-ID:** Enter your hardware id here. Please refer to the ecoDMS settings dialogue box to get the necessary Hardware ID (Clipboard).

8. Click "Activate License".

9. If the activation is successful, you will get your personal activation code.

    a) Note the displayed code.

        i. for example: Copy it to Clipboard.

10. Enter the Activation Code in the ecoDMS settings dialogue box.

11. Click "Activate".

    a) The license will be activated now.

12. Exit all ecoDMS programs and reconnect all connected profiles via the Connection Manager (Disconnect / Connect).

7.5 Deactivate License via Settings Dialogue Box

To deactivate your license directly via the settings dialogue box, complete the following steps [4, 3, 2, 5, 1]:

1. Select the tab "Settings - License" in the Settings dialogue box.

2. Click "Deactivate".

    a) The license will be deactivated now.

3. Exit all ecoDMS programs and reconnect all connected profiles via the Connection Manager (Disconnect / Connect).

Important Information for Chapter 7

[1] *If you are using a virtual machine, it must be a hardware virtual machine (HVM). ecoDMS does not support PV (Paravirtualization).Otherwise, you can not activate your license.*

[2] *If you cannot deactivate the licence according to the instructions in the ecoDMS manual because, for example, you did not deactivate your licence as described above, you can use this a form on ecodms Website to request ecoDMS GmbH to reset (deactivate) your licence.*

[3]   *This function requires access to the Internet.*

[4]   *Viewing and using this function requires specific system permissions.*

[5]   *You may only activate your licence for one server instance. If you want to install the licence on another server instance or after a new installation, for example, you must deactivate the licence first. You can deactivate your licence via the ecoDMS Settings dialogue box.*

8 Archiving

You can use different methods to archive documents in ecoDMS. This chapter describes the different archiving methods with the ecoDMS Client.

8.1 Basics

- There are different ways of archiving documents in ecoDMS Archive (via ecoDMS client, side panel, drag & drop, addons, plugins, scanning...).

- When archiving, the files must be on a local hard disk.

- Network drives (share directories) are only supported during archiving if they are an immediate part of the system.

- Direct archiving is not possible from a simple shared directory.

- ecoDMS always stores archived files in the original format. Office documents or emails are only converted to PDF/A format when archiving with the respective ecoDMS plugin / addon. Moreover, ecoDMS converts TIFF, PNG, JPG and non-readable PDF files to a full-text searchable PDF file per default.

8.2 Default Archiving

You can select and archive one or more documents from your file system [4, 2, 1, 3].

1. Start the "Archive" function. To do this you have the following options:
   a) **Menu**: Select "File - Archive" from the menu bar
   b) **Icon**: Click the icon "archive" on the toolbar
   c) **Right-click:** In the ecoDMS table: Right-click "Archive"
   d) **Keyboard shortcut:** Ctrl + A

Figure 8.1: Icon - Archive

2. A window opens with access to the file system. Here you can select the file(s) you need. The following additional functions are available:
   a) "Move file(s) to archive": ecoDMS moves the file(s) to the archive and removes them from the file system.
   b) "Archive file(s) as version": The file(s) are archived as versioned document in ecoDMS, so that after archiving, more versions can be added to the document.

3. To load the file(s), click "Open".
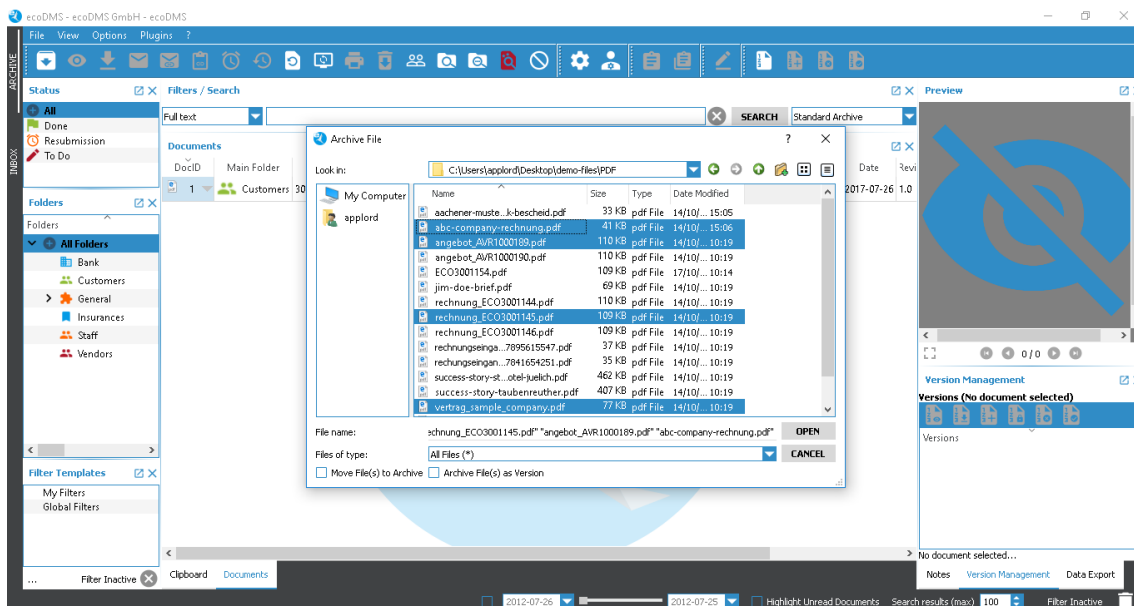
Figure 8.2: Archive File(s)

4. As the user, you must now classify the document(s).

5. If you selected several documents, you are asked to select the classification method. Please read the chapter Classification. Here the various classification methods are explained detailed.

   – **Classify Individually**: The documents are classified one by one.

   – **Mass classification:** All selected documents receive the same classification.

   – **No classification:** (Method is not recommended.) The documents are archived but not classified. However, the documents can also be classified later.
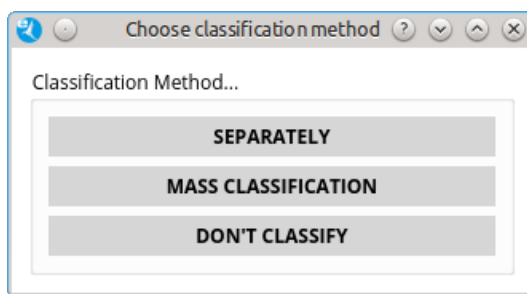
Figure 8.3: Select Classification Method

8.3 Drag and Drop

You can move documents into the ecoDMS Archive with the drag & drop function [4, 2, 1, 3].

1. Select one or several documents you want to archive (on the desktop, for example).

2. The following additional functions are available:

   a) Press the "Ctrl" shortcut ="Move File(s) to Archive"

      i. ecoDMS moves the file(s) to the archive and removes them from the file system.

   b) Press the "Alt" shortcut ="Archive File(s) as Version"

      i. ecoDMS archives the file(s) as versioned document(s), so that you can add more versions to the archived document.

     c) You can also combine both shortcuts.

3. Drag the documents into the ecoDMS table or on the desired folder in the archive.

4. As the user, you must now classify the document(s).

     a) If you selected several documents, you are asked to select the classification method. Please read the chapter Classification. Here the various classification methods are explained detailed.

          – **Classify Individually**: The documents are classified one by one.

          – **Mass classification:** All selected documents receive the same classification.

          – **No classification:** (Method is not recommended.) The documents are archived but not classified. However, the documents can also be classified later.
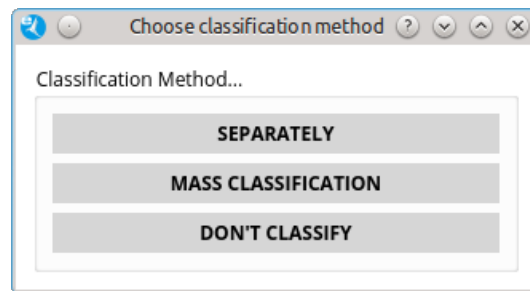
Figure 8.4: Select Classification Method

8.4 Move File(s) to Archive

You can archive files in ecoDMS and simultaneously delete them from the data carrier or the file system. To do this, ecoDMS has the following functions[4, 2, 1, 3]:

1. **Archiving with the drag & drop function**

     a) Select one or several documents you want to archive (on the desktop, for example).

     b) Press the "Ctrl" shortcut and drag the documents from your filesystem to the ecoDMS table via drag & drop.

        i. ecoDMS archives the file(s) as versioned document(s), so that you can add more versions to the archived document.

2. **Archiving using the dialogue box**

     a) Select one or several documents you want to archive via the "Archive" function (Default Archiving) in ecoDMS and activate the function "Archive File(s) as Version" in the dialogue box.

        i. ecoDMS archives the file(s) as versioned document(s), so that you can add more versions to the archived document.
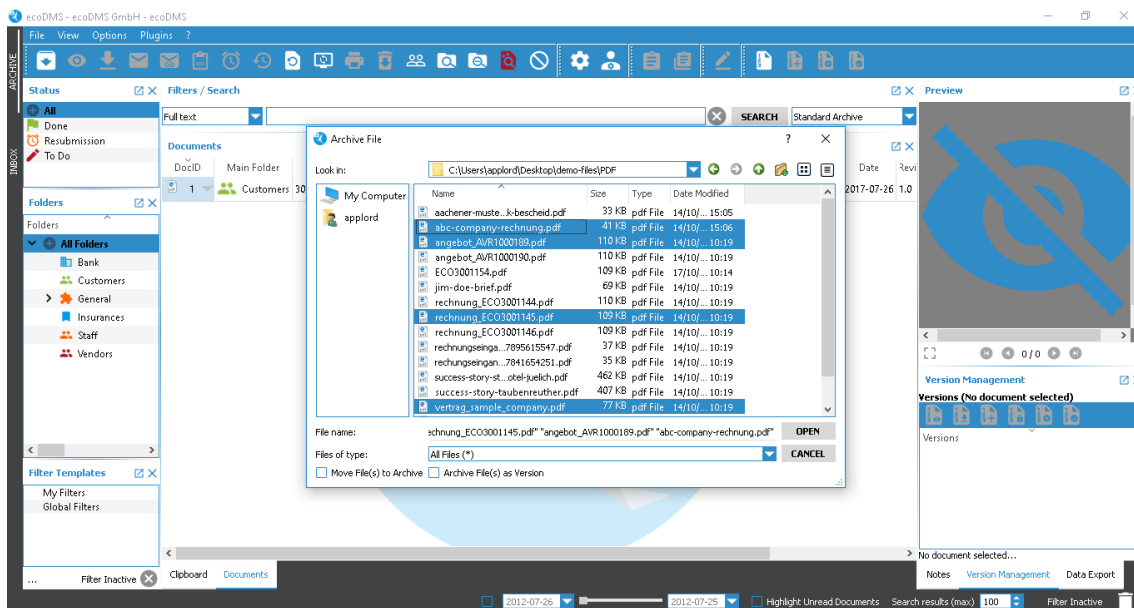
Figure 8.5: Move File(s) to Archive

8.5 Archive File(s) as Version

In ecoDMS you can archive files as versioned documents. To do this, ecoDMS has the following functions [4, 2, 1, 3]:

1. **Archiving with the drag & drop function**
   a) Select one or several documents you want to archive (on the desktop, for example).
   b) Press the "Alt" shortcut and drag the documents from your filesystem to the ecoDMS table via drag & drop.
      i. ecoDMS moves the file(s) to the archive and removes them from the file system.

2. **Archiving using the dialogue box**
   a) Select one or several documents you want to archive via the "Archive" function (Default Archiving) in ecoDMS and activate the function "Move File(s) to Archive" in the dialogue box.
      i. ecoDMS moves the file(s) to the archive and removes them from the file system.
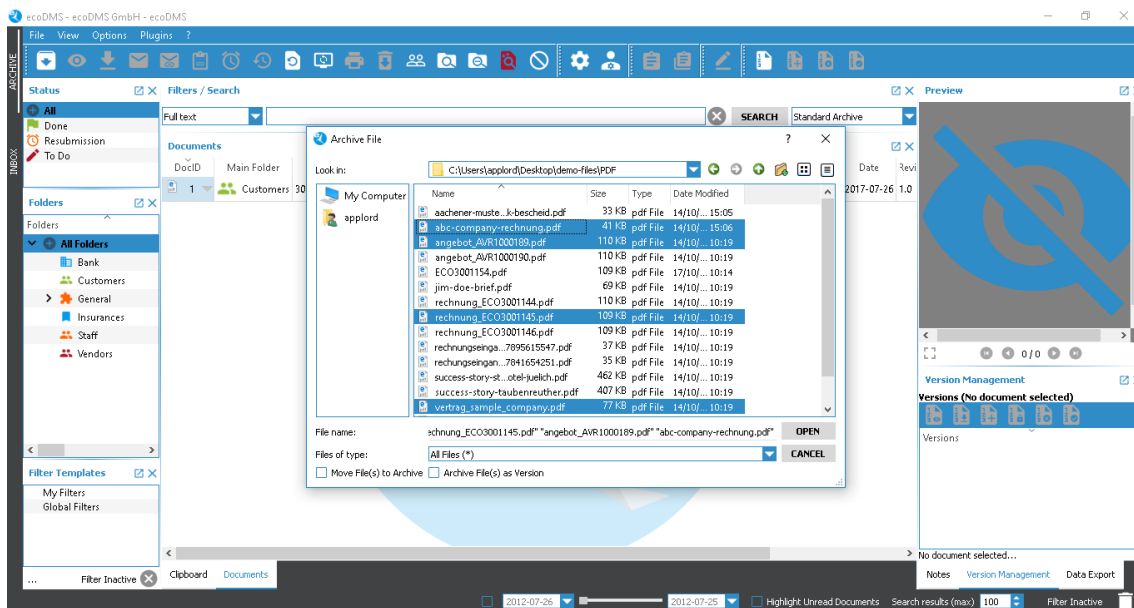
Figure 8.6: Archive File(s) as Version

3. **Archiving via Version Management**

   a) Please read the chapter "Version Management".
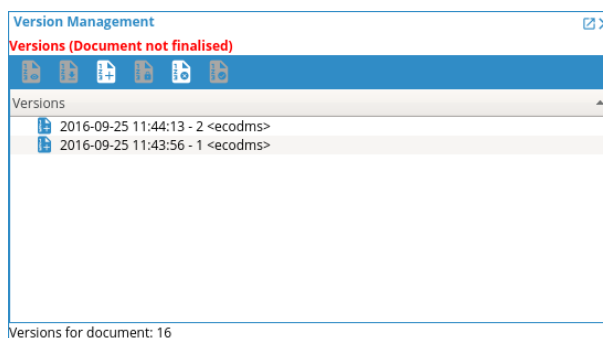
Figure 8.7: Window - Version Management

Important Information for Chapter 8

[1] *After the archiving process, the PDF, TIFF, JPG and PNG files are automatically converted into the (readable) PDF/A format. The quality and size of the file determine the conversion time and the feasibility. After the successful conversion, the PDF/A can be opened. Until then, the original file remains. You can call the PDF/A via the table. You can call the original files via the version management function. The system stores office files and e-mails through the ecoDMS plugins in their original form and as a PDF/A file.*

[2] *If you have selected a folder in ecoDMS, the folder is automatically used when you classify.*

[3] *The preview in the classification dialogue box is only displayed for PDF documents and files that are archived via the ecoDMS plug-ins or the PDF/A printer.*

[4] *Viewing and using this function requires specific system permissions.*

9 Inbox

Immediately after the scanning process, you can retrieve the documents via the Inbox in the ecoDMS Archive client. On the tab there are several functions available to process your emails, for example, rotate, delete, move [10, 1, 3].
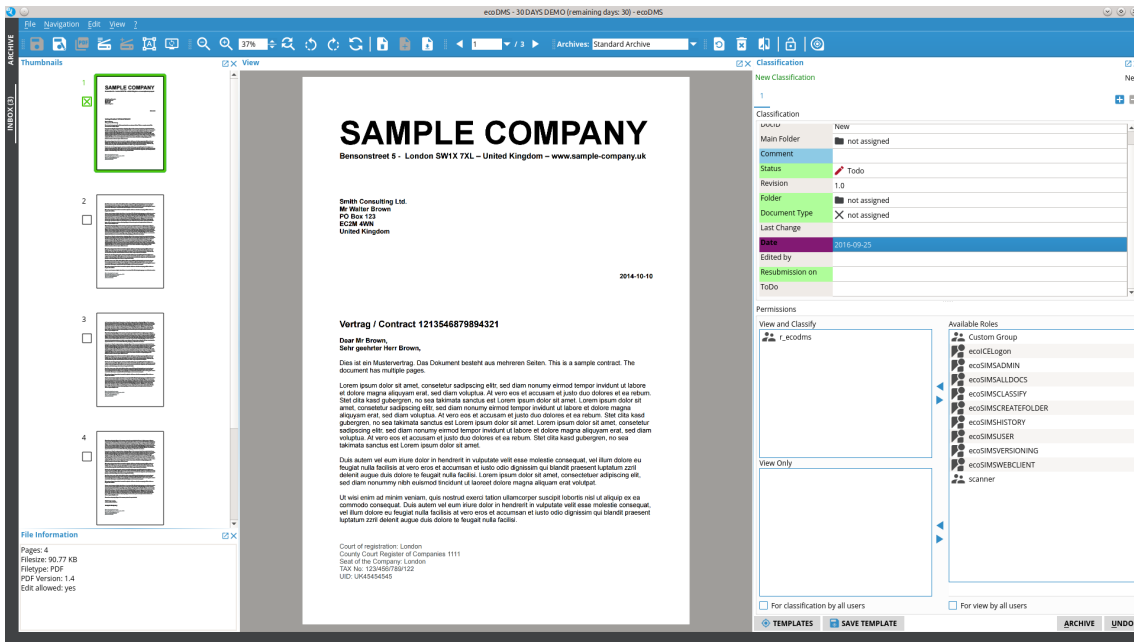
Figure 9.1: ecoDMS Inbox Tab
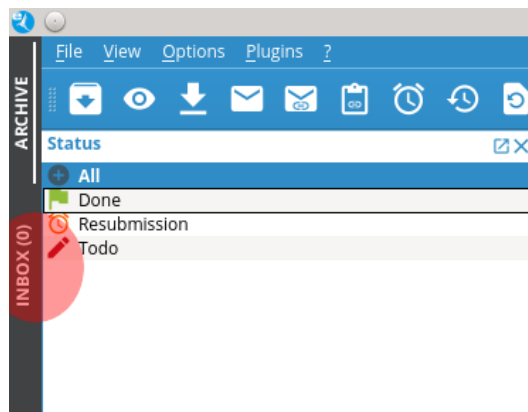
Figure 9.2: Skip to ecoDMS Inbox Tab

9.1 Basics

After scanning, the scanned documents are normally retrieved via the Inbox and prepared for archiving. As soon as the files are classified and archived, they become available for authorised users in ecoDMS Archive. The Inbox is the pre-stage to ecoDMS Archive.

1. You can either perform the scanning process via the ecoDMS Archive scaninput folder or the TWAIN/WIA/SANE interface.

2. The scaninput folder is configured automatically with the ecoDMS server.

   a) It allows scanning within the network.

   b) Moreover, it is possible to assign specific configurations and permissions for this folder.

   c) You can also create more scaninput folders with different configurations, if necessary.

3. From the Inbox you can retrieve TIFFs and PDFs and transfer them to the archive.

4. The Inbox provides several different editing functions. You can copy, cut and paste pages.

   a) Depending on the structure and type of a PDF file, the file can suppress these functions.

5. In the archiving process, the scanned TIFF and PDF documents are saved in ecoDMS Archive in their original format and also as searchable PDF/A documents.

6. Basically you can use any network scanner and any USB scanner which have the "Scan-to-Folder" function to scan into the scan-input folder of ecoDMS.

7. In addition, you can use numerous scanners, which have a TWAIN/WIA interface, to directly scan into the scan-programme.

8. The device must have PDF and/or TIFF as scan formats.

9. It is best to scan in the documents in black and white (black-white= 1-bit colour depth) or in shades of grey with 200-300 DPI.

9.1.1 Separator Pages

We recommend the use of separator pages so that you can scan documents as a batch without having to separate the documents manually in the client afterwards. Separator pages signal to the system that a new document is about to begin. The system automatically splits the documents and reads them in individually. A print template can be downloaded at ecoDMS website. The system recognises separator pages and empty pages and automatically hides them - if not disabled.

1. Print the two-page document (user-defined amount) double-sided so that the letter "T" is on the front side and on the reverse side of an A4 sheet (duplex method).

2. Always put a separator page between the end of one document and the beginning of the next document.

```
            TTTTTTTTTTTT




                                  ⊥⊥⊥⊥⊥⊥⊥⊥⊥⊥⊥⊥
```
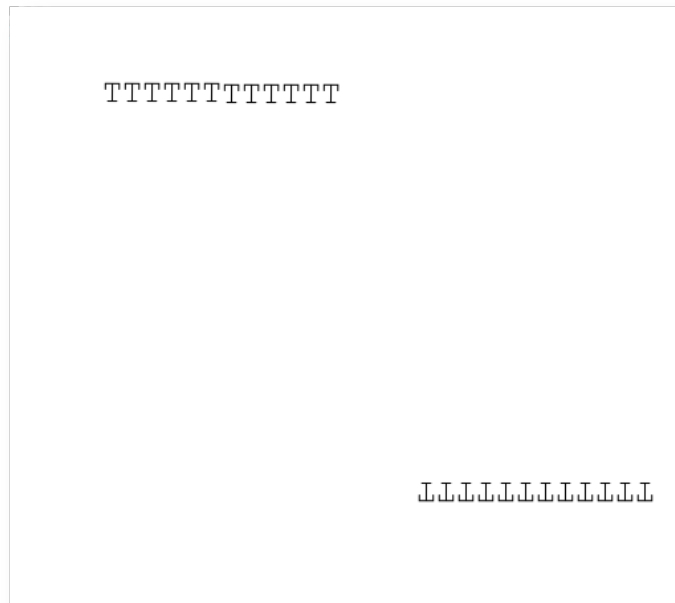
Figure 9.3: Separator Page

9.1.2 Document Orientation

- Before you archive, ensure that the individual pages are the right way around.

- The text should always be readable from left to right. This is important for the full text indexing.

- If necessary, you can turn the pages in the Inbox.

9.2 Scaninput Folder Management

A default scaninput folder is stored in the system for the server-based scan process. You can create up to 20 additional scaninput subfolders with different permissions and configurations via the settings dialogue box [10, 9].
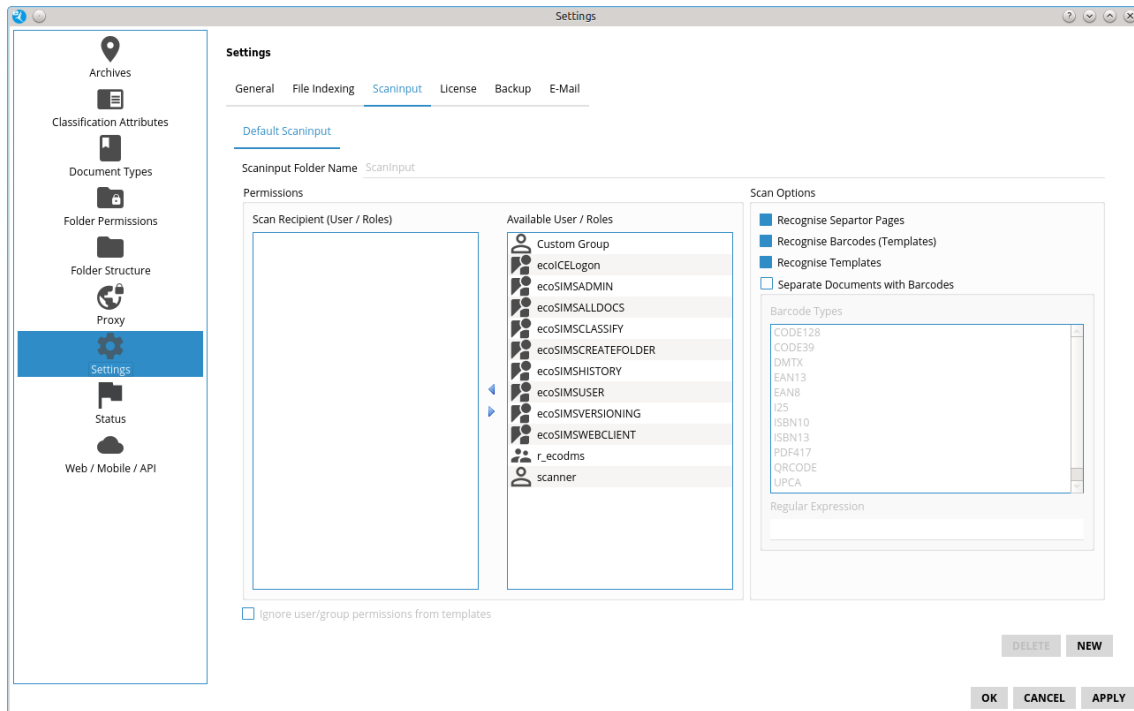
Figure 9.4: Settings - Settings - Scaninput

9.2.1 Create Scaninput Folder

You can create up to 20 additional scaninput subfolders on the scaninput tab. To create a new folder, complete the following steps [9, 10]:

1. Select the Settings - scaninput tab in the Settings dialogue box.

2. Click "New".

3. Enter the name for the new scaninput folder in the scaninput folder Name entry field.

    a) Only use characters allowed by the file system. We recommend you do not use umlauts and/or special characters.

4. As an option, you can now assign the further settings to this folder.

5. Click "Apply" to save the process in the Settings dialogue box.

6. You can create a total of 20 scaninput subfolders in this way.
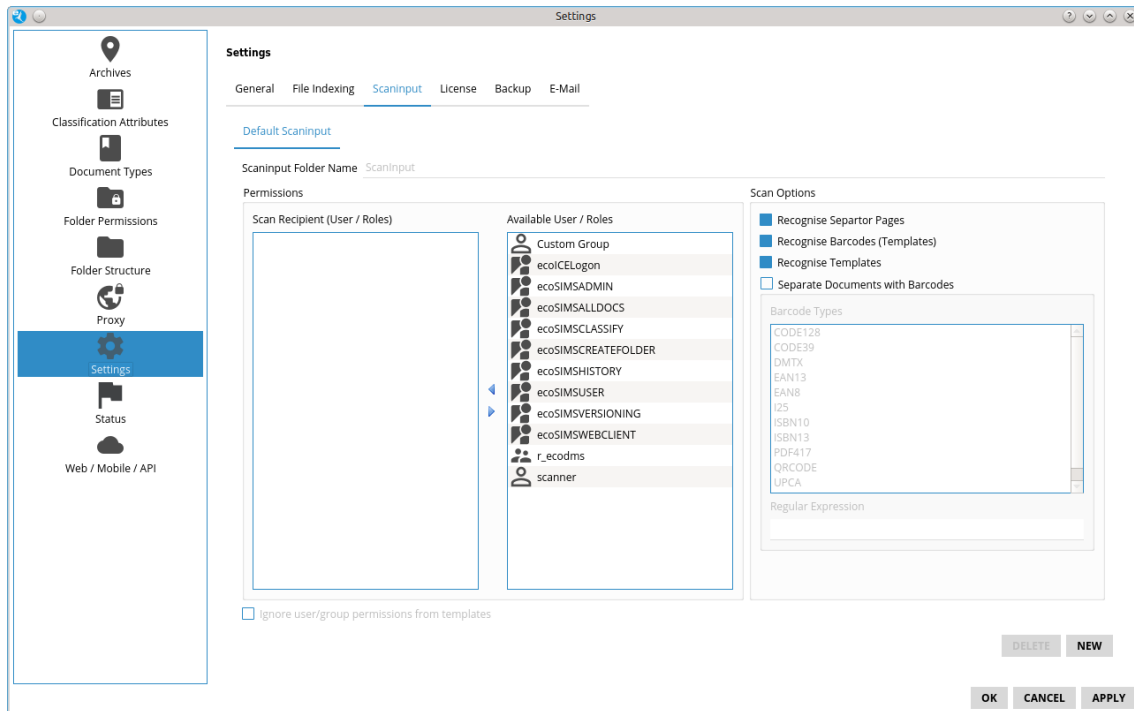
Figure 9.5: Settings - Settings - Create Scaninput

9.2.2 Scan Options

For each scaninput folder you can define different scan options:

9.2.2.1 Recognise Separator Pages

To scan several documents simultaneously, we recommend you use the official ecoDMS separator pages for document separation. The software splits the documents automatically into individual files. If you want ecoDMS Archive to recognise the separator pages, you must enable this function for each scaninput folder.

9.2.2.2 Recognise Templates

The template designer enables automatic classification and archiving of documents. If you want ecoDMS Archive to recognise the classification templates during the scan process, you must enable this function for the respective scaninput folder.

9.2.2.3 Recognise Barcodes (Templates)

Use the template designer to create barcodes. If you want the system to recognise the barcodes during the scan process, enable the function "Recognise Barcodes (Templates)" for the respective scaninput folder.

9.2.2.4 Separate Documents with Barcodes

To separate several documents into individual files, you can use individual barcodes. These can be created with any application. If you want ecoDMS Archive to recognise the barcodes during the scan process, enable the following settings:

1. First, enable the "Recognise separator pages" function.
    a) This function is the prerequisite for separating pages via barcode.
2. Enable the function "Separate Documents with Barcodes".
3. Select one or more barcode types that ecoDMS Archive should recognise.
4. **Optional experts function:** As an option, you can further limit and describe the barcode by entering regular expressions. The following expressions serve as an example:
    a) Barcode starts with

```
TEXT(.*)
```

b) Barcode contains

```
(.*)TEXT(.*)
```

c) Barcode ends with

```
(.*)TEXT
```

d) Barcode starts with "VC", followed by 5 digits and ends with "-V01"

```
VC[0-9]{5}\-V01
```

9.2.3 Permissions (Scan Recipients)

Each scaninput folder can be given a separate permission. The scanned documents are then visible for the stored scanning receiver only.

1. If the Scan Recipients area remains empty, the documents which were scanned via this folder are visible to all users in the Inbox.

2. If users and/or groups are dragged into the Scan Recipients field, the documents scanned via this folder automatically receive the permission stored there, and are thus only visible for these users.

   a) Exception: Users with the role "ecoSIMSALLDOCS". They can view all documents / folders independent of their permissions.

9.2.4 Ignore Users / Groups of Templates

Here you can specify how to handle permissions from classification templates (templates designer) if you set additional scaninput folder permissions.

1. **Function enabled:** If you enable this checkbox, documents are pre-classified as usual when ecoDMS recognises a classification template. However, the permission in a template is removed and replaced by the permission stored in the scaninput folder.

2. **Function disabled:** If you do not enable the "Ignore Users / Group Permissions from Templates" checkbox, the permissions stored in the template continue to apply when a classification template is recognised. If the "Classification Template" does not contain the user who scanned the document, the document is not visible to this user in the Inbox.

9.2.5 Delete Scaninput Folder

Custom scaninput folders can also be deleted. In this case the folders are removed in the Settings dialogue box. The Standard scaninput folder cannot be deleted. To delete, complete the following steps [10, 9]:

1. Select the tab "Settings - Scaninput" in the Settings dialogue box.

2. Select the "scaninput folder" tab you want to delete.

3. Click the "Delete" button.

   a) The "scaninput folder" is now deleted in the Settings dialogue box.

   b) For safety reasons, the folders remain in the file system. To delete the folders in the file system, the administrator merely needs to select the folder in the file system and remove it manually. **Before deleting, ensure that there are no documents in the "scaninput folder".**

4. Click "Apply" to save the process in the Settings dialogue box.

9.3 Scanning via Scaninput

You can either perform the scanning process via the ecoDMS Archive scaninput folder or the TWAIN/WIA/SANE interface. The scaninput folder is configured automatically with the ecoDMS server [6].

9.3.1 Target Path for Scaninput Folders

In order to access this folder, the permissions must be adjusted accordingly. The scaninput folder is located below the file path that was selected during the installation of ecoDMS Server:

1. Under Ubuntu/Debian it is always at:

```
/opt/ecodms/workdir/scaninput
```

2. Standard Windows:

```
\%ProgramData%\ecodms\workdir\scaninput
```

If you have created custom scaninput folders, they are subfolders in the respective data path.

9.3.2 Scan Process

1. In your scanner, setup the destination path for the scaninput folder to which you want to scan the documents.

2. Scan the documents to the scaninput folder.

3. ecoDMS receives the documents from the scaninput folder after just a few seconds.
   a) This is the reason why the documents are displayed in the folder just for a few seconds.
   b) It can take a few minutes to retrieve the documents, depending on the file size.

9.3.3 Manual Access

Completed TIFFs or PDFs can also be stored manually in the folder.

1. Access from your workstation to the desired scaninput folder. To do this, use the address of the destination path.

2. Insert the PDF and / or TIFF files in the scaninput folder.

3. The client receives the documents after just a few seconds from the scaninput folder.
   a) This is the reason why the documents are displayed in the folder just for a few seconds.
   b) Depending on the file size, it can take a few minutes to request the documents via the client.

9.4 Scanning via TWAIN/WIA/SANE

As an alternative to the scaninput folder, you can also scan directly from the client (Inbox). In this case, the scan is processed via a TWAIN / WIA / SANE interface. Below you can read details for this process [7, 6].

9.4.1 Select Scanner

To use the interface, you have to select a scanner. Complete the following steps [7, 6]:

1. Click the menu "File - Scan - Select Scanner"
   a) The Select Scanner dialogue box opens.

2. Choose from the list of available scanners the required device.

3. Confirm this process with "OK" or cancel it with "Cancel".

9.4.2 Configure Scanner

After you have chosen a scanner, you have to configure it. Complete the following steps [7, 6]:

1. Click the menu "File - Scan - Settings"

    a) The "Scanner Options" dialogue box opens.

2. Select the matching scanner log according to the operating system and the scanner.

    a) TWAIN

        i. WIA

        ii. SANE

        iii. ...

3. Enable the required functions for the scan process in the "Options" area.

    a) Rotate pages automatically

        i. The system automatically rotates pages that were scanned in upside down. Enable this function for the rotation process.

    b) Suppress empty pages

        i. The system can automatically detect and remove empty pages. Enable this function for the rotation process.

    c) Detect separator pages

        i. To scan in several documents simultaneously, we recommend you use the official ecoDMS separator pages for document separation. The software splits the documents automatically into individual files. Enable this function to detect the separator pages.

4. Confirm your configuration with "OK" or cancel it with "Cancel".
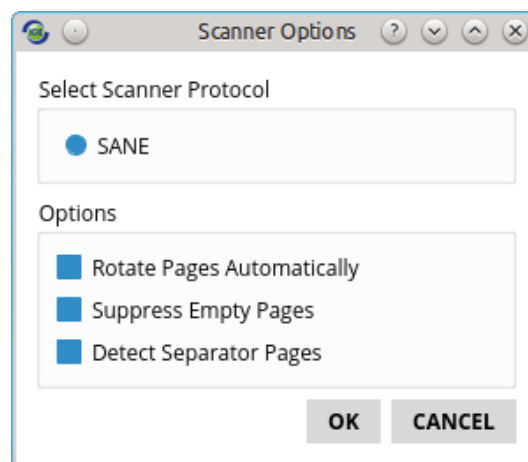
Figure 9.6: Scanner Options

9.4.3 Scan New Document

To scan a completely new document, complete the following steps [7, 6]:

1. Select the function "Scan New Document" with one of the following options:

    a) Click the menu "File - Scan - Scan New Document" **or**

    b) Click the toolbar icon "Scan New Document" **or**

    c) Enter this shortcut: F10

2. If several scanners are connected, you must select a source in the next step.

    a) If only one scanner is connected, the respective scanner window opens. The window is different for different scanners.

3. Start scanning process.

4. The scanned pages are loaded as a new document in the last position in the Inbox.

Figure 9.7: Icon - Scan New Document

9.4.4 Add Pages to Document

To scan a completely new document, complete the following steps [7, 6]:

1. Call up the document in the client.

2. Select the function "Add Pages to Document" with one of the following options:

   a) Click the menu "File - Scan - Scan New Document" **or**
   b) Click the toolbar icon "Scan New Document" **or**
   c) Enter this shortcut: F10

3. If several scanners are connected, you must select a source in the next step.

   a) If only one scanner is connected, the respective scanner window opens. The window is different for different scanners.

4. Start scanning process.

5. The scanned pages will be added to the existing document.

Figure 9.8: Icon - Add Page(s) to Document

9.5 Request Scans

After scanning, the scanned documents are retrieved via the Inbox and prepared for archiving. When starting the programme, the available documents are loaded automatically one after the other. While working with the Inbox, the user can also request the documents manually. To display the scanned documents in ecoDMS, they must first be classified and archived through the Inbox.

To view and update the documents and classifications manually in the Inbox, you have the followings options:

1. To do this, click the icon "Request Documents (F5)" on the toolbar **or**

2. Enter this shortcut: F5 **or**

3. When the Inbox restarts, it automatically retrieves and updates the documents and classifications.

Figure 9.9: Icon - Request Documents

9.6 Classification

Via Classification you can assign, for example, the virtual destination folder in ecoDMS, the document type, the status, the responsibilities and many more archiving details to each file you archive. These details allow documents to be systematically filed and easily retrieved through keyword search as an alternative and/or in addition to the Full Text Search.

   – You can classify scanned documents in the classification dialogue box of the Inbox.

   – The classification dialogue box is described in detail in the respective chapter of this manual.

9.6.1 Copy & Paste Content & Barcodes

You can select document content or a barcode from the document, and copy it for the classification. To do so, complete the following steps:

1. In the classification dialogue box, select the input or date field to which you want to copy the contents or the barcode information.

2. The following options are available for copying content:

   a) Overwrite existing text in the attribute of a free text field (for example, comment):
      Press the Ctrl key and Right-click an area to select it in the scanned document.

   b) Add texts to an existing text in the attribute of a free text field (for example, comment):
      Press the Ctrl key and the Shift key and Right-click an area to select it in the scanned document.

   c) Barcode in a document can be decoded and entered as text:
      To decode barcodes in a document, press and hold the Ctrl + Alt keys and select the area while pressing the right mouse button.

Figure 9.10: Icon - Copy Text from Document
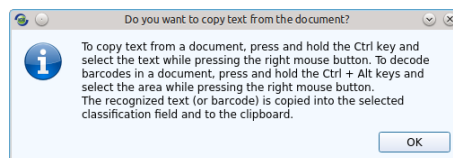
Figure 9.11: Explanation: Copy Text from Document

9.6.1.1 Date Formats

ecoDMS recognises the following date formats:

1. yyyy.MM.dd

2. dd.MM.yyyy

3. dd.MM.yy

4. dd. MMM yyyy

5. dd. MMMM yyyy

6. dd MM yyyy

7. dd MMMM yyyy

8. dd.MMyyyy

9. ddMMyyyy

10. ddMM.yyyy

9.6.2 Default Classification (For User Workstation)

To classify scanned documents, you can define a default classification on your workstation. This is loaded per default when a document is scanned in and retrieved with the Inbox at your workstation [10, 4].

- The default classification is loaded exclusively in the Inbox at your workstation if no other classification template is recognised.

- If you select the "Reset Classification" function in the classification dialogue box, the default classification will not be loaded again for the next documents.
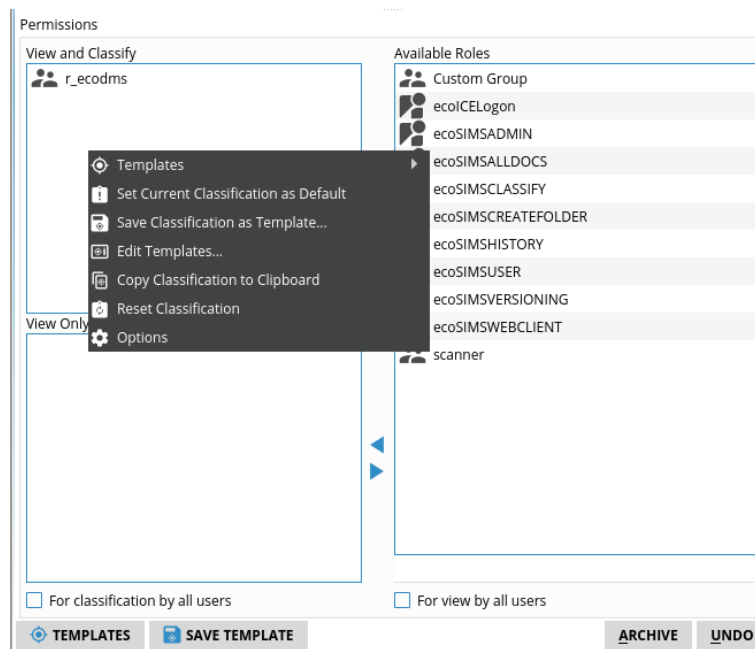
Figure 9.12: Set Default Classification in Inbox

9.6.2.1 Create Default Classification

To create a default classification for your workstation, complete the following steps:

1. In the Inbox classification dialogue box, specify the classification information and/or the permissions which you want to store as the default settings.

2. Right-click the "Permissions" area.

3. Click "Specify current classification as default".

9.6.2.2 Delete Default Classification

If you defined a default classification at your workstation, you can delete it again if necessary. For future classifications, the default classification will no longer be loaded in the Inbox. To delete a default classification at your workstation, complete the following steps [4, 10]:

1. In the classification dialogue box, go to any document in the Inbox with the mouse.

2. Right-click the "Permissions" area.

3. Click "Reset Classification".

9.7 Archive Scans

To archive the scanned documents via the Inbox, complete the following steps:

1. Select the "Archive" from the list in the toolbar.
   a) Depending on the settings more archives can be set. However, this is not recommended. To draw the best possible benefit from the advantages the software offers, we recommend you store all data in an archive (Keyword: Filter functions) [2, 11].
   b) Before you archive a document definitively the correct archive should be selected.
   c) After you have selected the correct archive, reviewed the document and possibly edited and classification information has been entered correctly, the document can be stored in the archive ecoDMS.

2. Click the button "Archive" in the classification dialogue box.
   a) This process cannot be undone.
   b) Later changes to the document are now no longer possible because of audit-proof.

3. The documents are archived as "Finalised" files. You can add any versions.
   a) After the archiving process, the scanned PDF or TIFF files are automatically converted into the (readable) PDF/A format.
   b) The quality and size of the file determine the conversion time and the feasibility.
   c) After the successful conversion, the PDF/A can be opened in the ecoDMS Client. Until then the original file remains.
   d) You can open the PDF/A via the table. You can retrieve the original files via the version management function.

Figure 9.13: Classification & Archiving via Inbox

9.8 Statistics

The statistics shows the processes of scanned documents and displays them in a diagram. Using the statistics, you can follow each step of the route a document takes from scanning to archiving. The documents are displayed in the statistics until they have been archived. This function is only visible and executable for users with administrator rights. To open statistics, complete the following steps [10]:

1. Click the menu "Edit - Show Statistics".
   a) The "Statistics dialogue box" opens.

2. In the "Process List" area you can select the desired process / document.

3. Click "Reload Process List" to reload all current processes.

4. Click "Reload View" to reload the current process.

5. Enable "Reload View Automatically" to update statistics automatically.

Figure 9.14: Statistics
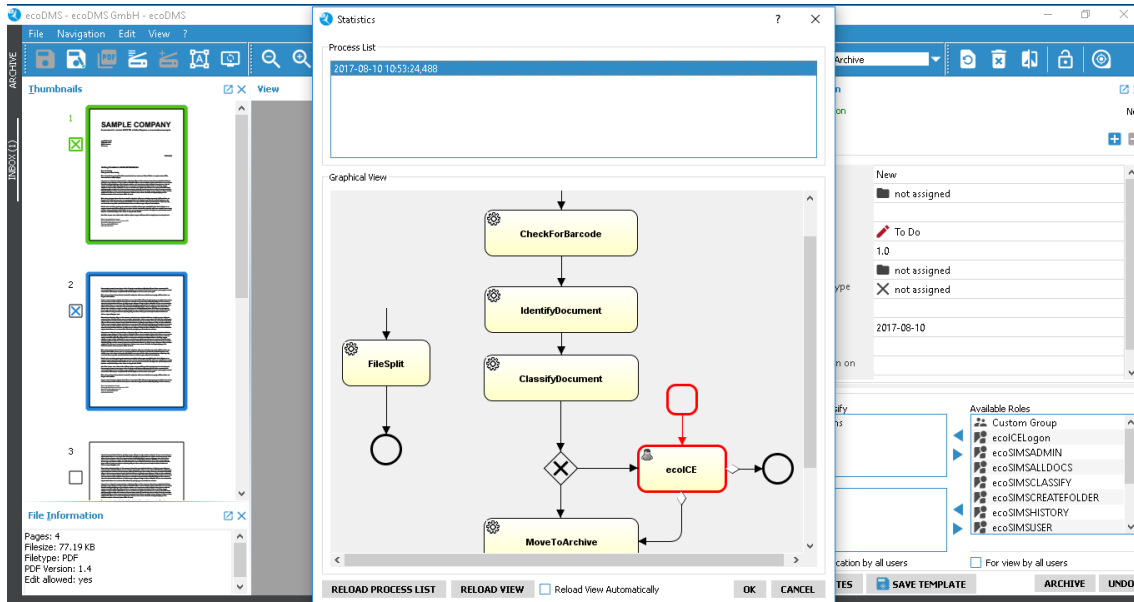
Figure 9.15: Inbox - Statistic (Example)

9.9 Next Document

The documents are loaded and displayed one after the other in this application. You can switch between the documents. To skip to the next document, you have the following options:

1. Click the toolbar icon "Next Document" **or**

2. Click the menu "Navigation - Next Document" **or**

3. Enter this shortcut: Ctrl + Arrow right

Figure 9.16: Icon - Next Document

9.10 Previous Document

The documents are loaded and displayed one after the other in this application. You can switch between the documents. To skip to the next document, you have the following options:

1. Click the toolbar icon "Previous Document" **or**

2. Click the menu "Navigation - Previous Document" **or**

3. Enter this shortcut: Ctrl + Arrow left

Figure 9.17: Icon - Previous Document

9.11 Import Documents

In addition to the already described scan processes, TIFF and PDF files can be imported into the Inbox.

9.11.1 Import Documents (Drag & Drop)

Use this function to drag and drop TIFF or PDF files from the file system into the Inbox.

– Please note that in this case the separator function and the automatic template recognition do not work.

– Template recognition can, however, be performed manually after loading via the function "Search matching classification templates" in the toolbar.

To import via drag and drop, complete the following steps:

1. Select the documents you want to import from your file system.

2. Drag the selected documents via drag and drop into the user interface of the scan programme.
    a) The import process may take a while depending on the file size.

3. The documents are displayed as individual files in the scan programme and can be processed consecutively.

9.11.2 Import Documents (Menu)

Use this function to drag and drop TIFF or PDF files from the file system into the Inbox.

– Please note that in this case the separator function and the automatic template recognition do not work.

– Template recognition can, however, be performed manually after loading via the function "Search matching classification templates" in the toolbar.

To import, complete the following steps:

1. Select the "Import" function. To do this, you have the following options:
    a) Click "File - Import" in the menu or
    b) Enter this key command: CTRL+I

2. A dialogue box opens.
    a) Select the TIFF or PDF file on your file system.
    b) Then confirm your selection with "Open".
    c) The document is now loaded into the client.

Figure 9.18: Icon - Import Documents

9.12 Split Documents

There are several ways to split a document:

- Splitting documents via barcode (see Scan & Archive (Inbox) -> Scaninput Folder Management -> Scan Options).

- Splitting documents via separator page (see Scan & Archive (Inbox -> Scanning - Basics).

- Splitting documents via Inbox function (see following description).

With this function you can insert pages from a PDF or TIFF document separately or as a document.

1. Select the pages you want to split in the "Thumbnails" area. (Press and hold the "CTRL" key to select several documents).

2. Use the function "Split Document". To use the function, there are several options:

   a) Click the toolbar icon "Split Document" **or**

   b) Enter this shortcut: F7

3. The dialogue box shows the modified current document and the new document.

4. Confirm the process with "OK" or cancel it with "Cancel".

5. The divided pages are inserted in the last position in the client.

6. In order to classify and archive a document, save the changes first.

   a) Click the save icon.

Figure 9.19: Icon - Split Document
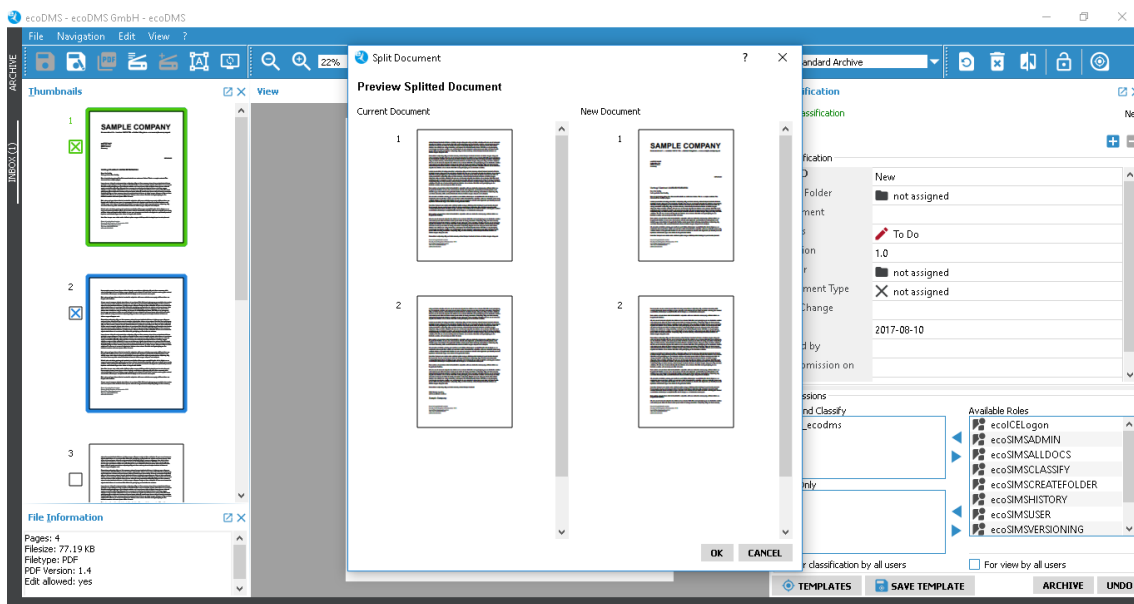
Figure 9.20: Inbox - Split Document

9.13 Unlock Documents

Documents can only be edited and classified in here if they are not locked by another user and if the server connection is robust. If this is not the case, the documents are locked. If required, the administrator can unlock the documents. Complete the following steps [10]:

1. Select the document.

2. Click the toolbar icon "Unlock Document".

Figure 9.21: Icon - Unlock Document

9.14 Edit Documents

You can use various functions to edit the documents requested via this application before they are archived.

9.14.1 Copy, Cut and Paste Pages

The Inbox provides several different editing functions. You can copy, cut and paste pages. Depending on the structure and type of a PDF file, the file can suppress these functions.

9.14.1.1 Cut

If a document includes multiple pages, selected pages can be cut and pasted in another position or document. To do so, complete the following steps:

1. Select the pages you want to cut in the "Thumbnails" area. (Press and hold the "CTRL" key to select several documents).

2. Use the function "Cut". To use the function, there are several options:
   a) Click the menu "Edit - Cut" **or**
   b) Right-click a selected page - "Cut" **or**
   c) Enter this shortcut: Ctrl + X

3. The selection is cut and copied to the clipboard.

4. In order to classify and archive a document, save the changes first.
   a) Click the Save icon.

Figure 9.22: Icon - Cut

9.14.1.2 Paste

Pages that are cut and copied are automatically copied to the clipboard and can be inserted anywhere in this application.

1. Select the pages you want to cut in the "Thumbnails" area. (Press and hold the "CTRL" key to select several documents).

2. Use the function "Paste". To use the function, there are several options:

     a) Click the menu "Edit - Paste" **or**

     b) Right-click a selected page - "Paste" **or**

     c) Enter this shortcut: Ctrl + V

3. The selection is pasted to the document.

4. In order to classify and archive a document, save the changes first.

     a) Click the save icon.

Figure 9.23: Icon - Paste

9.14.1.3 Copy

Pages that are copied are automatically copied to the clipboard and can be inserted anywhere in this application.

1. Select the pages you want to copy in the "Thumbnails" area. (Press and hold the "CTRL" key to select several documents).

2. Use the function "Copy". To use the function, there are several options:

     a) Click the menu "Edit - Copy" **or**

     b) Right-click a selected page - "Copy" **or**

     c) Enter this shortcut: Ctrl + C

3. The selection is copied to the clipboard.

4. In order to classify and archive a document, save the changes first.

     a) Click the save icon.

Figure 9.24: Icon - Copy

9.14.2 Rotate Pages

If necessary, you can rotate the pages of a document.

9.14.2.1 Rotate left

Use this tool to rotate selected page(s) 90 degrees to the left.

1. Select the pages you want to rotate in the "Thumbnails" area. (Press and hold the "CTRL" key to select several documents).

2. Use the function "Rotate Left". To use the function, there are several options:

     a) Click the menu "View - Rotate Left" **or**

     b) Right-click a selected page - "Rotate Left" **or**

     c) Click the toolbar icon "Rotate Left" **or**

     d) Enter this shortcut: Ctrl + Shift + L

3. In order to classify and archive a document, save the changes first.

     a) Click the save icon.

Figure 9.25: Icon - Rotate Left

9.14.2.2 Rotate Right

Use this tool to rotate selected page(s) 90 degrees to the right.

1. Select the pages you want to rotate in the "Thumbnails" area. (Press and hold the "CTRL" key to select several documents).

2. Use the function "Rotate Right". To use the function, there are several options:

    a) Click the menu "View - Rotate Right" **or**

    b) Right-click a selected page - "Rotate Right" **or**

    c) Click the toolbar icon "Rotate Right" **or**

    d) Enter this shortcut: Ctrl + Shift + R

3. In order to classify and archive a document, save the changes first.

    a) Click the save icon.

Figure 9.26: Icon - Rotate Right

9.14.2.3 Rotate 180 Degrees

Use this tool to rotate selected page(s) by 180 degrees.

1. Select the pages you want to rotate in the "Thumbnails" area. (Press and hold the "CTRL" key to select several documents).

2. Use the function "Rotate 180 degrees". To use the function, there are several options:

    a) Click the menu "View - Rotate 180 degrees" **or**

    b) Right-click a selected page - "Rotate 180 degrees" **or**

    c) Click the toolbar icon "Rotate 180 degrees" **or**

    d) Enter this shortcut: Ctrl + R

3. In order to classify and archive a document, save the changes first.

    a) Click the save icon.

Figure 9.27: Icon - Rotate 180 degrees

9.14.3 Export Pages

You can export selected pages of a TIFF document and save them in a file.

1. Select the pages you want to export in the "Thumbnails" area. (Press and hold the "CTRL" key to select several documents).

2. Use the function "Export Selected Page(s)". To use the function, there are several options:

a) Click the menu "Edit - Export Selected Page(s)" **or**

b) Right-click a selected page - "Export Selected Page(s)" **or**

c) Click the toolbar icon "Export Selected Page(s)" **or**

d) Enter this shortcut: Ctrl + E

3. Select the path and enter a file name.

4. Confirm your entry with "Save" or cancel the process with "Cancel".

Figure 9.28: Icon - Export Selected Page(s)

9.14.4 Add Pages

You can add more pages to existing TIFF files [5].

1. Select the document.

2. Use the function "Add Page(s)". To use the function, there are several options:

   a) Click the menu "Edit - Add Page(s)" **or**

   b) Right-click a selected page - "Add Page(s)" **or**

   c) Click the toolbar icon "Add Page(s)" **or**

   d) Enter this shortcut: Ins

3. Select the path and choose the file.

4. Confirm your selection with "Open" or cancel the process with "Cancel".

5. In order to classify and archive a document, save the changes first.

   a) Click the save icon.

Figure 9.29: Icon - Add Selected Page(s)

9.14.5 Delete Pages

You can delete selected pages.

1. Select the pages you want to delete in the "Thumbnails" area. (Press and hold the "CTRL" key to select several documents).

2. Use the function "Delete Selected Page(s)". To use the function, there are several options:

   a) Click the menu "Edit - Delete Selected Page(s)" **or**

   b) Right-click a selected page - "Delete Selected Page(s)" **or**

   c) Click the toolbar icon "Delete Selected Page(s)" **or**

   d) Enter this shortcut: Del

3. Confirm the message with "Yes" or cancel the process with "No".

4. In order to classify and archive a document, save the changes first.

   a) Click the save icon.

Figure 9.30: Icon - Delete Selected Page(s)

9.14.6 Move Pages

You can change the order of pages within a document. To move page(s), complete the following steps:

1. Select the pages you want to move in the "Thumbnails" area. (Press and hold the "CTRL" key to select several documents).

2. Move the page(s) by dragging them to the new position.

3. In order to classify and archive a document, save the changes first.
    a) Click the save icon.

9.14.7 Swap Pages

You can change the order of pages within a document. To swap the position of page(s), complete the following steps:

1. Select the pages you want to swap in the "Thumbnails" area. (Press and hold the "CTRL" key to select several documents).

2. Move the page onto another page.

3. When the two pages touch, two arrows appear which signal and execute the swap.

4. In order to classify and archive a document, save the changes first.
    a) Click the save icon.

9.14.8 Zoom Pages / View

The software includes various zoom functions for page display.

9.14.8.1 Zoom Out

The software includes various zoom functions for page display. To zoom out, complete the following steps:

1. Select the page which you want to view in the "Thumbnails" area.

2. Use the function "Zoom Out". To use the function, there are several options:
    a) Click the menu "View - Zoom Out" **or**
    b) Click the toolbar icon "Zoom Out" **or**
    c) Enter a percentage value for the view in the spinbox **or**
    d) Click the bottom arrow in spinbox **or**
    e) Enter this shortcut: Alt + -

Figure 9.31: Icon - Zoom Out

9.14.8.2 Zoom In

The software includes various zoom functions for page display. To zoom in, complete the following steps:

1. Select the page which you want to view in the "Thumbnails" area.

2. Use the function "Zoom In". To use the function, there are several options:
   a) Click the menu "View - Zoom In" **or**
   b) Click the toolbar icon "Zoom In" **or**
   c) Enter a percentage value for the view in the spinbox **or**
   d) Click the top arrow in spinbox **or**
   e) Press the right mouse button and select the area which you want to zoom in in the "view" window **or**
   f) Enter this shortcut: Alt + +

Figure 9.32: Icon - Zoom In

9.14.8.3 Fit

The software includes various zoom functions for the display of pages. To fit in, complete the following steps:

1. Select the page which you want to view in the "Thumbnails" area.

2. Use the function "Fit". To use the function, there are several options:
   a) Click the menu "View - Fit" **or**
   b) Click the toolbar icon "Fit" **or**
   c) Double click on the page in the "View" window **or**
   d) Enter this shortcut: Alt + Z

Figure 9.33: Icon - Fit

9.14.9 Select Pages

You have various options to select or mark the pages of a document.

9.14.9.1 Select All Pages

This function selects all pages of the displayed document simultaneously.

1. Click into "View" area.

2. Use the function "Select All Pages". To use the function, there are several options:
   a) Click the menu "Edit - Select All Pages" **or**
   b) Right click on a page - "Select All Pages" **or**
   c) Enter this shortcut: Ctrl + Alt + A

9.14.9.2 Select Even Pages

With this function you can select all pages with even numbers in a document.

1. Click into "View" area.

2. Use the function "Select All Pages". To use the function, there are several options:
   a) Click the menu "Edit - Select Even Pages" **or**
   b) Right click on a page - "Select Even Pages" **or**
   c) Enter this shortcut: Ctrl + Alt + G

9.14.9.3 Select Odd Pages

With this function you can select all pages with odd numbers in a document.

1. Click into "View" area.

2. Use the function "Select Odd Pages". To use the function, there are several options:
   a) Click the menu "Edit - Select Odd Pages" **or**
   b) Right click on a page - "Select Odd Pages" **or**
   c) Enter this shortcut: Ctrl + Alt + U

9.14.9.4 Undo Selection

This function can undo the selection of pages in a document.

1. Click into "View" area.

2. Use the function "Undo Selection". To use the function, there are several options:
   a) Click the menu "Edit - Undo Selection" **or**
   b) Right click on a page - "Undo Selections" **or**
   c) Enter this shortcut: Ctrl + Shift + A

9.14.9.5 Reverse Selection

All pages are marked, except the one(s) you have already selected.

1. Click into "View" area.

2. Use the function "Reverse Selection". To use the function, there are several options:
   a) Click the menu "Edit - Reverse Selection" **or**
   b) Right click on a page - "Reverse Selections" **or**
   c) Enter this shortcut: Ctrl + Shift + U

9.14.9.6 Next Page

With this function the next page of the current document is displayed in the "View" window.

1. Click into "View" area.

2. Use the function "Next Page". To use the function, there are several options:
   a) Click the menu "Navigation - Next Page" **or**
   b) Right click on a page - "Next Page" **or**
   c) Enter this shortcut: Ctrl + Shift + Arrow down

9.14.9.7 Previous Page

With this function the previous page of the current document is displayed in the "View" window.

1. Click into "View" area.

2. Use the function "Next Page". To use the function, there are several options:
   a) Click the menu "Navigation - Next Page" **or**
   b) Right click on a page - "Next Page" **or**
   c) Enter this shortcut: Ctrl + Shift + Arrow down

9.15 Close Documents

You can close documents.

- Closed documents are not removed from the server.
- Every time the programme launches, all available, scanned documents are automatically retrieved.
- With a click on the icon "Request Documents" all available, scanned documents are automatically reloaded.

You have various options for closing a document.

1. Use the function "Close". To use the function, there are several options:
   a) Click the menu "File - Close" **or**
   b) Enter this shortcut: Ctrl + Alt + C

9.15.1 Close All Documents

If you do not want to exit the application but want to close all opened documents, you have the following options:

- Closed documents are not removed from the server.
- Every time the programme launches, all available, scanned documents are automatically retrieved.
- With a click on the icon "Request Documents" all available, scanned documents are automatically reloaded.

1. Use the function "Close". To use the function, there are several options:
   a) Click the menu "File - Close All" **or**
   b) Enter this shortcut: Ctrl + Shift + C

9.16 Delete Documents

When the documents are displayed in this scan programme, they have not yet been stored in the ecoDMS archive. Therefore, documents that are not required can be deleted again after scanning. You cannot undo this operation.

9.16.1 Delete Document (User)

Documents that should not be archived can be removed from the server. To do so, complete the following steps:

1. Select the document.
   a) Click the icon "Delete Document from Server" on the toolbar or
   b) Press "F8" on your keyboard.

2. The system will ask you to confirm the delete process.
   a) The document is deleted irrevocably if you confirm the process with "Yes".

b) Click "No" to abort the process.

Figure 9.34: Icon - Delete Document from Server

9.16.2 Delete All Documents (Admin)

To remove all documents from the scan programme, you require special system permissions in addition to the standard permissions. For security reasons, this function is only available to users who have been assigned the system roles "ecoSIM-SAdmin", "ecoSIMSCLASSIFY" and "ecoSIMSALLDOCS". Otherwise the function is not visible [10].

To delete all documents, complete the following steps:

1. Select "Edit -> Delete All Documents..." from the menu.

2. The system will ask you to confirm the delete process.

    a) All available documents in the scan programme are deleted irrevocably if you confirm the process with "Yes".

    b) Click "No" to abort the process.

9.17 Storage Functions

There are various functions for saving documents and/or changes. By default, this part of the application is provided for archiving of scanned documents. In addition to the archiving function, the software also includes other functions to save documents. These can be used in parts independently of the archive function.

9.17.1 Save Changes

The classification dialogue box is enabled if you make changes to a scanned document (for example: Rotate Pages, Delete Pages...). To unlock the document for Classification, the changes must be saved first. Complete the following steps:

1. Make the required modifications to the document.

2. Use the function "Save". To use the function, there are several options:

    a) Click the menu "File - Save" **or**

    b) Click the toolbar icon "Save" **or**

    c) Enter this shortcut: Ctrl + S

Figure 9.35: Icon - Save

9.17.2 Save as PDF

The scanned documents can be saved as a PDF file locally, on a data carrier or in the file system [8].

1. Select the document.

2. Use the function "Save as PDF". To use the function, there are several options:

    a) Click the menu "File - Save as PDF" **or**

    b) Click the toolbar icon "Save as PDF"

3. Use the file name and the destination to specify the PDF in the dialogue box that opens.

4. You can also save the file as a searchable PDF.
    a) To do so, enable the command "Save as searchable PDF".
        i. This function is only included in the ecoDMS full version.

5. Click "Save" to save the PDF or "Cancel" to cancel the process.

Figure 9.36: Icon - Save as PDF

9.17.3 Save as

The scanned documents can be saved on a data carrier or in the file system.

1. Select the document.

2. Use the function "Save as". To use the function, there are several options:
    a) Click the menu "File - Save as" **or**
    b) Click the toolbar icon "Save as"

3. Use the file name and the destination to specify the file in the dialogue box that opens.

4. Click "Save" to save the file or "Cancel" to cancel the process.

Figure 9.37: Icon - Save as PDF

Important Information for Chapter 9

[1]   *A document may only be classified if the user has a permission to classify the specified document.*

[2]   *An archive is only used to separate documents within a server and is not an independent server. Because of that you cannot assign user-defined settings, structures, users, groups and/or permissions to archives.*

[3]   *Es wird empfohlen die Inbox vor der Datensicherung vollständig zu leeren. Hintergrund: Wenn das Backup auf einem anderen Betriebssystem (z.B. Windows -> Linux) wiederhergestellt wird, stimmen die Pfade zu den Dateien in der Inbox nicht mehr. Man kann diese dann nur noch über einen eingeblendeten Dialog vom Server löschen.*

[4]   *Please note that these settings refer to the individual workstation and are not stored in the user profile.*

[5]   *The functions "add pages" is not available for PDF files.*

[6]   *The Scaninput folder is recommended as the scanning method because only with this method all processes on the server (including automatic template recognition) can be carried out.*

[7]   *The TWAIN/WIA/SANE interface is compatible with many but not all scanner models. If you scan via TWAIN/WIA/SANE interface, the pre-classification is only possible via the function "Search Matching Classification Template". Via this interface only TIFF files can be scanned.*

[8]   *This feature requires a licence of the ecoDMS full version but can be tested during the time and is then automatically disabled until a full licence is activated.*

[9]   *This function requires a licence for the full version of ecoDMS (this function is not available in the trial and Free4Three Edition).*

[10] *Viewing and using this function requires specific system permissions.*

[11] *We recommend you store all documents in an archive. For this, the default archive is recommended. This simplifies the search and filing processes immensely. When archiving and searching for documents, you always use the current archive. If multiple archives are created, files can be moved to another archive if necessary.*

10 Classification

Via Classification you can assign, for example, the virtual destination folder in ecoDMS, the document type, the status, the responsibilities and many more archiving details to each file you archive. These details allow documents to be systematically filed and easily retrieved through keyword search as an alternative and/or in addition to the Full Text Search. The following chapter describes various methods and options for document classification.

10.1 Classify

There are various classification attributes available for the Classification (assignment / assignment of meta data) of archived documents. A distinction is made between "standard attributes" that are integrated in the system and "user-defined attributes". The following chapters explain the "Standard Attributes".

10.1.1 DocID

DocID stands for "Document Identification Number". A sequential document identification number is automatically allocated to each archived document. The user cannot edit or enter the DocID manually [6, 1, 2].

10.1.2 Main Folder

The main folders are determined by the folder structure and are allocated automatically. The user cannot create the main folder manually [6, 1, 2].

- If you have not yet selected a folder, the entry "Not assigned" is displayed. As soon as you have selected a folder from the folder structure, the system automatically recognises and enters the associated main folder.

- For more information on this topic, please refer to the chapter on "Settings - Folder Structure".

10.1.3 Folder

Folders are determined by the folder structure and can either be selected manually or automatically via classification templates and/or via the "folder recognition". The folder determines the virtual file destination in ecoDMS. If you have not yet selected a folder, the entry "Not assigned" is displayed. You can also create folders directly through the classification dialogue box or the folder structure if you have the according permission.

- Tip: If the folder window is open, you can jump directly to the required folder by entering the first letters or numbers of the folder name (also see Folder Search).

- Information: A user can only see the folders, documents and classifications for which the user has a permission.

In the following you will learn how to select a folder[6, 1, 2]:

10.1.3.1 Classification Dialogue Box (Included in all ecoDMS Components)

1. Open the classification dialogue box for the document(s).

2. Select the entry field for the "Folder" attribute.

3. Open the Folder Structure:
   a) Either by double-clicking the entry field **or**
   b) By entering the letter "e" (edit).

4. Select the folder

a) by double-clicking it in the Folder Structure **or**

b) by entering the folder name, the key, or deposited keywords into the Folder Structure.

   i. In this case an input window opens.

   ii. ecoDMS selects the folder you searched for. Use the "F3" key to continue the search.

   iii. Confirm your entry selection with the "Enter" key.
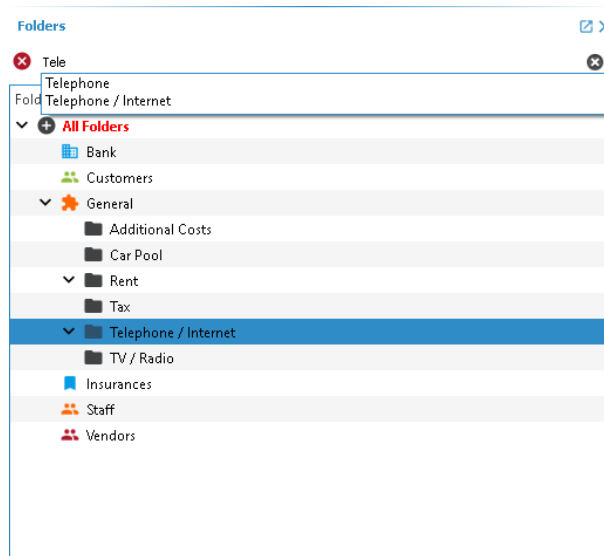
Figure 10.1: Searching for Folders

10.1.3.1.1 Copy & Paste Text If a document preview is displayed in the classification dialogue box, you can select the preview contents and use it for classification. In the Inbox this information can be copied from the "View" window. To do so, complete the following steps [4]:

1. In the classification dialogue box, select the entry field for the "Folder" attribute.

2. Press the "Ctrl" key and Right-click the area where you want to paste the content, in the "preview".

3. If you enter the "Folder" attribute, the Folder Structure opens. The copied content is recorded as a search term for the folder.

4. Select the folder and confirm your selection with "Enter".

10.1.3.2 Table in ecoDMS Client

1. Select the document in the ecoDMS table.

2. Select the "Folder" attribute.

3. Open the Folder Structure:

   a) Either by double-clicking the entry field **or**

   b) By entering the letter "e" (edit).

4. Select the folder

   a) by double-clicking it in the Folder Structure or

   b) by entering the folder name, the key, or deposited keywords into the Folder Structure.

      i. In this case an input window opens.

      ii. ecoDMS selects the folder you searched for. Use the "F3" key to continue the search.

      iii. Confirm your entry and selection with the "Enter" key.
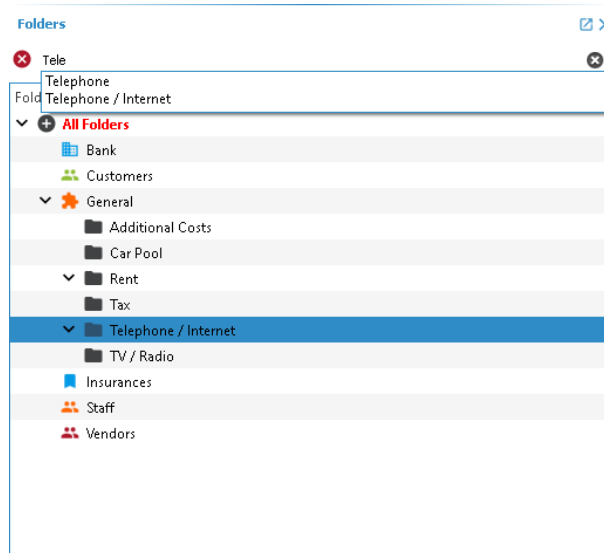
Figure 10.2: Searching for Folders

10.1.3.3 Drag & Drop Classification in ecoDMS

1. Select the document(s) in the ecoDMS table.

2. Grab the document(s) "at the DocID".

3. Drag the document(s) to the required folder in the ecoDMS "Folder" window.

10.1.4 Comment

The "Comment" box is a free text box which can be filled with any content. You can either enter the comment manually or ecoDMS can automatically enter the comment via the classification templates, which can be recognised from the file name. In the following you will learn how to enter the attribute [6, 1, 2]:

10.1.4.1 Classification Dialogue Box (Included in all ecoDMS Components)

1. Open the classification dialogue box for the document(s).

2. Select the entry field for the "Comment" attribute.
   a) Either by double-clicking **or**
   b) By entering the letter "e" (edit).

3. Enter the comment.

10.1.4.1.1 Copy & Paste Text If a document preview is displayed in the classification dialogue box, you can select the preview contents and use it for classification. In the Inbox this information can be copied from the "View" window. To do so, complete the following steps [4]:

1. In the classification dialogue box, select the entry field for the "Comment" attribute.

2. The following options are available for copying content:
   a) Overwrite existing text in the attribute of a free text field (for example, comment):
      Press the "Ctrl" key and Right-click an area to select it in the scanned document.
   b) Add texts to an existing text in the attribute of a free text field (for example, comment):
      Press the "Ctrl" key and the "Shift" key and Right-click an area to select it in the scanned document.

10.1.4.2 Table in ecoDMS Client

1. Select the document in the ecoDMS table.

2. Select the entry field for the "Comment" attribute.
   a) Either by double-clicking <u>or</u>
   b) By entering the letter "e" (edit).

3. Enter the comment.

10.1.5 Status

A status provides information about the processing status of a document. As a default, 3 statuses are deposited in the archive [6, 1, 2]:

1. Done

2. Resubmission (please read the chapter "Resubmissions")

3. ToDo

These can be renamed or enhanced by the administrator, but not deleted. You can either assign a status manually or ecoDMS recognises it automatically through the classification templates. In the following you will learn how to manually select the Status:

10.1.5.1 Classification Dialogue Box (Included in all ecoDMS Components)

1. Open the classification dialogue box for the document(s).

2. Select the entry field for the Status attribute.
   a) Either by double-clicking **or**
   b) By entering the letter "e" (edit).

3. Select the Status.
   a) If you select Resubmission, the calendar opens to enter the resubmission date.
   b) Select the date in the calendar.
      i. Use the arrow keys (left, right) to switch between the months.
      ii. You can change the month and the year using the navigation in the calendar header.
      iii. Click "Today" to set the current day.
      iv. You can also enter the date directly. The first number is entered in the calendar.
   c) Confirm your entry and selection with "OK".
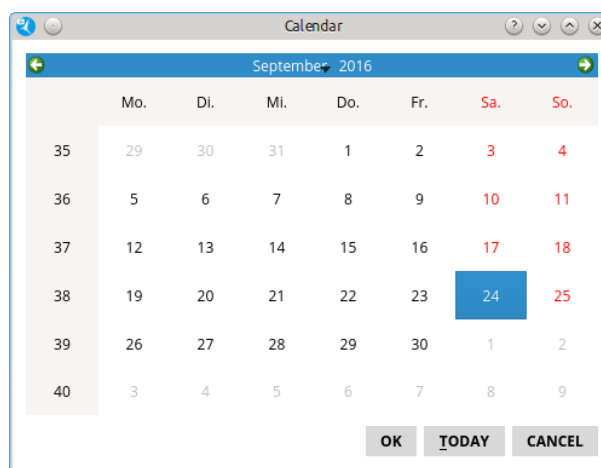
Figure 10.3: Calendar - Select Date

10.1.5.2 Table in ecoDMS Client

1. Select the document in the ecoDMS table.

2. Select the entry field for the Status attribute.

   a) Either by double-clicking **or**

   b) By entering the letter "e" (edit).

3. Select the Status.

   a) If you select Resubmission, the calendar opens to enter the resubmission date.

   b) Select the date in the calendar.

      i. Use the arrow keys (left, right) to switch between the months.

      ii. You can change the month and the year using the navigation in the calendar header.

      iii. Click "Today" to set the current day.

      iv. You can also enter the date directly. The first number is entered in the calendar.

4. Confirm your entry and selection with "OK".

Figure 10.4: Calendar - Select Date

10.1.5.3 Drag & Drop Classification in ecoDMS

1. Select the document(s) in the ecoDMS table.

2. Grab the document(s) "at the DocID".

3. Drag the document(s) to the required Status in the ecoDMS Status window.

   a) If you select Resubmission, the calendar opens to enter the resubmission date.

   b) Select the date in the calendar.

      i. Use the arrow keys (left, right) to switch between the months.

      ii. You can change the month and the year using the navigation in the calendar header.

      iii. Click "Today" to set the current day.

      iv. You can also enter the date directly. The first number is entered in the calendar.

4. Confirm your entry and selection with "OK".
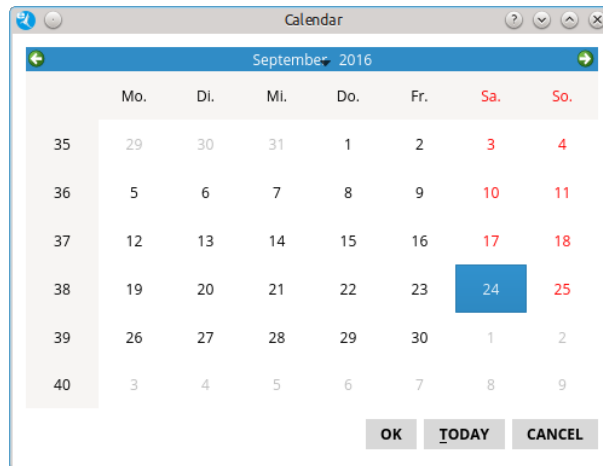
Figure 10.5: Calendar - Select Date

10.1.6 Revision

The revision is automatically assigned by the system. The revision increments by one with each change to the classification of a document. At the same time an entry is made in the document history. The revision number shows how often a file was changed within the classification after archiving. The user cannot change the DocID. The revision only refers to changes within the Classification. ecoDMS records any change to the classification attributes of a document in a history. All processing and archiving steps are thus automatically logged and can be reproduced at any time [6, 2].

10.1.7 Document Type

When assigning documents, the type of document (e.g. incoming invoices, outgoing invoices, agreement, offer is specified in Document Type. We recommend you select the Document Type when classifying each document you archive. This makes the handling and the retrieval of documents much easier. You can either assign a status manually or ecoDMS recognises it automatically through the "classification templates". If you have not yet selected a Document Type, the entry "Not assigned" is displayed. In the following you will learn how to manually select the Document Type [6, 2]:

10.1.7.1 Classification Dialogue Box (Included in all ecoDMS Components)

1. Open the classification dialogue box for the document(s).

2. Select the entry field for the Document Type attribute.

    a) Either by double-clicking **or**

    b) By entering the letter "e" (edit).

3. Select the Document Type.

10.1.7.2 Table in ecoDMS Client

1. Select the document in the ecoDMS table.

2. Select the entry field for the Document Type attribute.

    a) Either by double-clicking **or**

    b) By entering the letter "e" (edit).

3. Select the Document Type.

10.1.8 Last Change

If a change is made to the classification after the archiving process, the date and time of the last change to the document is displayed here. The classification attribute is automatically allocated and cannot be entered manually by the user [6, 2].

10.1.9 Date

The date is automatically assigned when archiving, but it can be changed if necessary. We recommend you store the actual postal date of receipt of the document as date in ecoDMS. When searching for documents, the actual date can be included in the search. You can either assign a status manually or ecoDMS recognises it automatically. In the following you will learn how to manually select the "date" [6, 2]:

10.1.9.1 Classification Dialogue Box (Included in all ecoDMS Components)

1. Open the classification dialogue box for the document(s).

2. Select the entry field for the "Date" attribute.

   a) Either by double-clicking **or**

   b) By entering the letter "e" (edit).

3. The calendar dialogue box opens. Select the date in the calendar.

   a) Use the arrow keys (left, right) to switch between the months.

   b) You can change the month and the year using the navigation in the calendar header.

   c) Click "Today" to set the current day.

   d) You can also enter the date directly. The first number is entered in the calendar.

4. Confirm your entry and selection with "OK".
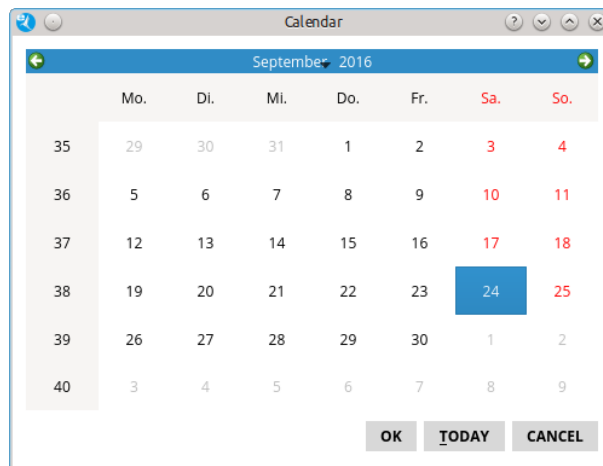
Figure 10.6: Calendar - Select Date

10.1.9.1.1 Copy & Paste Text   If a document preview is displayed in the classification dialogue box, you can select the preview contents and use it for classification. In the Inbox this information can be copied from the "View" window. To do so, complete the following steps [4]:

1. In the classification dialogue box, select the entry field for the "Date" attribute.

2. Press the "Ctrl" key and Right-click the area where you want to paste the content, in the "preview".

ecoDMS recognises the following date formats:

1. yyyy.MM.dd

2. dd.MM.yyyy

3. dd.MM.yy

4. dd. MMM yyyy

5. dd. MMMM yyyy

6. dd MM yyyy

7. dd MMMM yyyy

8. dd.MMyyyy

9. ddMMyyyy

10. ddMM.yyyy

10.1.9.2 Table in ecoDMS Client

1. Select the document in the ecoDMS table.

2. Select the entry field for the "Date" attribute.

    a) Either by double-clicking **or**

    b) By entering the letter "e" (edit).

3. The calendar dialogue box opens. Select the date in the calendar.

    a) Use the arrow keys (left, right) to switch between the months.

    b) You can change the month and the year using the navigation in the calendar header.

    c) Click "Today" to set the current day.

    d) You can also enter the date directly. The first number is entered in the calendar.

4. Confirm your entry and selection with "OK".

10.2 Permissions

To ensure that the documents can only be viewed and edited by authorised persons, you can assign individual permissions to each document and each folder in ecoDMS. This ensures confidentiality of the documents. You can assign permissions in the classification dialogue box.
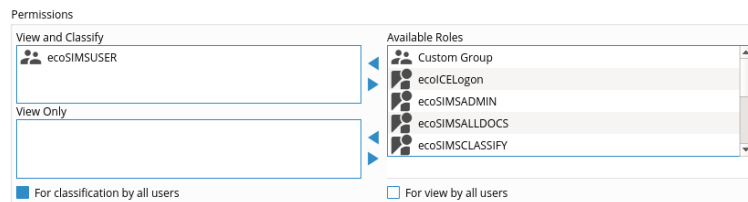
Figure 10.7: Classification Dialogue Box - Permissions

10.2.1 Assign Permissions

To assign permissions, complete the following steps:

10.2.1.1 View and Classify

This area contains all "roles" (users, groups) that are allowed to view and classify the document after the Classification is saved. Please note that at least one user or role (group) must be assigned in this permission area. To assign "roles" to this area, complete the following steps [6, 1, 7]:

1. Select the "roles" (users, groups) in the "Available Roles" area.

    a) If you hold the "Ctrl" key, you can select several roles simultaneously.

2. Drag and drop the "roles" into the "View and Classify" area.

    a) Alternatively, you can assign the "roles" to the area with the upper arrow icon (arrow right).

10.2.1.2 View Only

This area contains all "roles" (users, groups) that are only allowed to view but not classify the document after the Classification is saved. To assign "roles" to this area, complete the following steps [6, 1, 7]:

1. Select the "roles" (users, groups) in the "Available Roles" area.

    a) If you hold the "Ctrl" key, you can select several roles simultaneously.

2. Drag and drop the "roles" into the "View Only" area.

    a) Alternatively, you can assign the "roles" to the area with the lower arrow icon (arrow left).

10.2.1.3 For Classify by All Users

If the "For Classify by All Users" command is enabled, the document can be viewed and classified by all users after the Classification is saved. Exception: The associated folder limits access as it has further permissions [6, 1].

– The "ecoSIMSUSER" role is entered by the system in the "View and Classify" area when the command is enabled.

10.2.1.4 For View by All Users

If the "For View by All Users" command is enabled, the document can be viewed by all users after the Classification is saved. Exception: The associated folder limits access as it has further permissions [6, 1].

– The "ecoSIMSUSER" role is entered by the system in the "View Only" area when the command is enabled.

10.2.2 Remove Permissions

To remove permissions, complete the following steps:

10.2.2.1 View and Classify

This area contains all "roles" (users, groups) that are allowed to view and classify the document after the Classification is saved. Please note that at least one user or role (group) must be assigned in this permission area. To remove a profile from the "Roles" area, complete the following steps [6, 1, 7]:

1. Select the "roles" (users, groups) in the "View and Classify" area.

    a) If you hold the "Ctrl" key, you can select several roles simultaneously.

2. Drag and drop the "roles" into the "Available Roles" area.

    a) Alternatively, you can assign the "roles" to the area with the upper arrow icon (arrow right).

10.2.2.2 View Only

This area contains all "roles" (users, groups) that are only allowed to view but not classify the document after the Classification is saved. To remove "roles" from this area, complete the following steps [6, 1, 7]:

1. Select the "roles" (users, groups) in the "View Only" area.

    a) If you hold the "Ctrl" key, you can select several roles simultaneously.

2. Drag and drop the "roles" into the "Available Roles" area.

    a) Alternatively, you can assign the "roles" to the area with the lower arrow icon (arrow right).

10.2.2.3 For Classify by All Users

If the "For Classify by All Users" command is disabled, the document cannot be viewed and classified by all users after the Classification is saved (please note the folder permission) [6, 1].

– The "ecoSIMSUSER" role is removed from the system in the "View and Classify" area when the command is disabled.

10.2.2.4 For View by All Users

If the "For View by All Users" command is disabled, the document cannot be viewed by all users after the Classification is saved (please note the folder permission) [6, 1].

- The "ecoSIMSUSER" role is removed from the system in the "View Only" area when the command is disabled.

10.3 Classification Dialogue Box

You have several methods and options to classify documents. The classification dialogue box is very important. This includes all stored Classification Information. For almost any archiving the Classification Dialog Box is relevant.
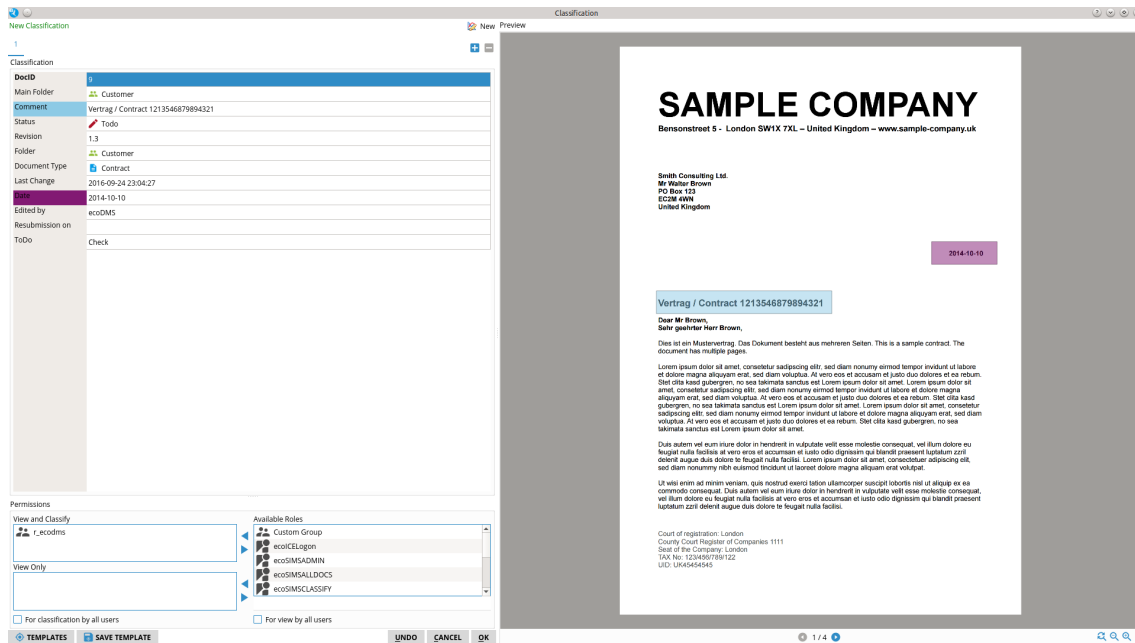
Figure 10.8: Classification Dialogue Box with Preview

10.3.1 Open Classification Dialogue Box (ecoDMS Client)

To open the classification dialogue box in the ecoDMS Client, complete the following steps [6, 1]:

1. Select documents in the ecoDMS table.

2. Select now the "Classify" function. You have following options:

   a) Right-click one of the selected documents - Classify **or**

   b) Click the "Classify" icon in toolbar **or**

   c) Enter this shortcut: CTRL + K

Figure 10.9: Icon - Classify

10.3.2 Change order of Attributes

Administrators can define the appropriate classification attributes and mandatory fields for each document type via the Settings dialogue box. The display and order of the attributes therefore depends on the settings. Please refer to the section "Settings -> Document Types & Retention Periods" for more details.

10.3.3 Show/Hide Attributes

Administrators can define the appropriate classification attributes and mandatory fields for each document type via the Settings dialogue box. The display and order of the attributes therefore depends on the settings. Please refer to the section "Settings -> Document Types & Retention Periods" for more details.

10.3.4 Undo

The "Undo" button reverts all previously made classification settings and returns the classification of the selected document to its last saved state. If, for example, ecoDMS recognises a "classification template", you can reset the automatic Classification by clicking the Undo button for the specific document.

10.3.5 OK

To save the classification, click "OK"

10.3.6 Save and Continue

If you have opened several documents for classification, click the "Save and Continue" button to save the change(s) made to the document and to edit the next one.

10.3.7 Skip Between Documents

If you have selected several documents for simple classification, you can use the keys (in the upper area of the classification window) to skip between documents.

10.3.8 Cancel - Message

If you have not saved your changes to the classification, a message displays. Click "Yes" to save and "No" to discard the changes.

10.4 Preview

When archiving via the Office plugins or the PDF/A Printer and when generally saving PDF files, a preview is also displayed inside the classification dialogue box. From this preview window, you can use text passages and date fields for the classification [4, 5].

  – For mass classification, there is no preview window in the classification dialogue box.
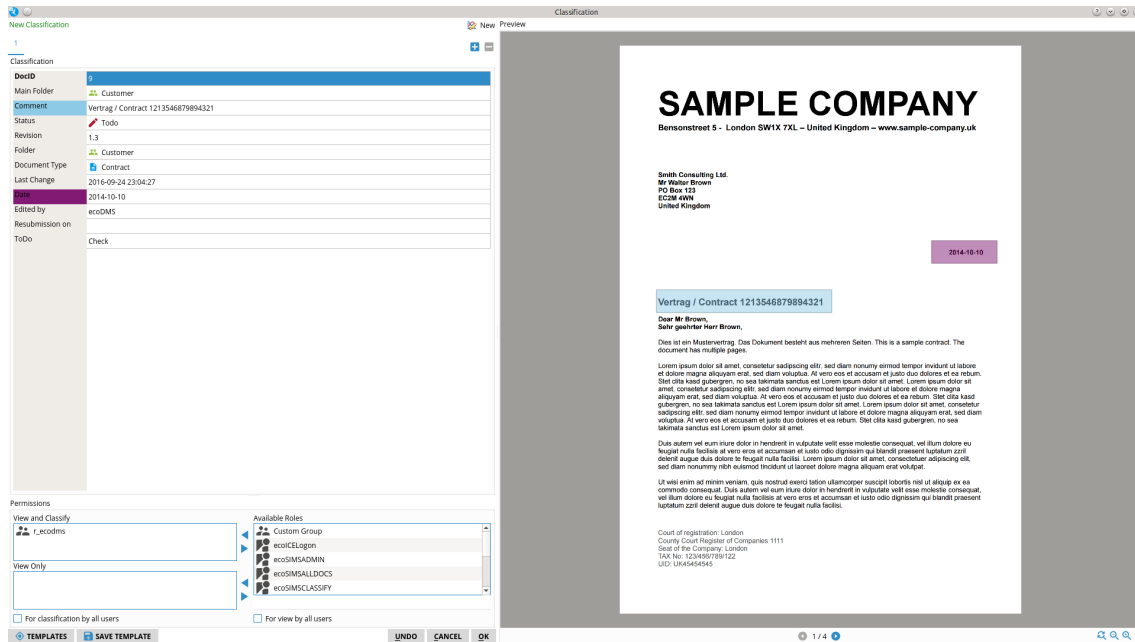
Figure 10.10: Classification Dialogue Box with Preview

10.5 Mass Classification (ecoDMS Client)

When mass classifying, you can classify several documents simultaneously with the same information. There are several ways to open this function. When using the mass classify function, only fill in the boxes which you want to apply to all the documents you want to classify. All other classification attributes are not overwritten.

10.5.1 Open Mass Classification

To open / start the mass classification, complete the following steps [6, 1]:

1. Select several documents in ecoDMS table.

2. Now select the function mass classification. You have followings options:

    a) Right-click one of the selected documents - Mass Classification **or**

    b) Click the icon mass classification in toolbar **or**

    c) Enter this shortcut: Ctrl + Shift + K

Alternatively, the mass classification can be selected as classification method when you archive multiple documents at the same time and you want to classify them in the same way.

Figure 10.11: Icon - Mass Classification
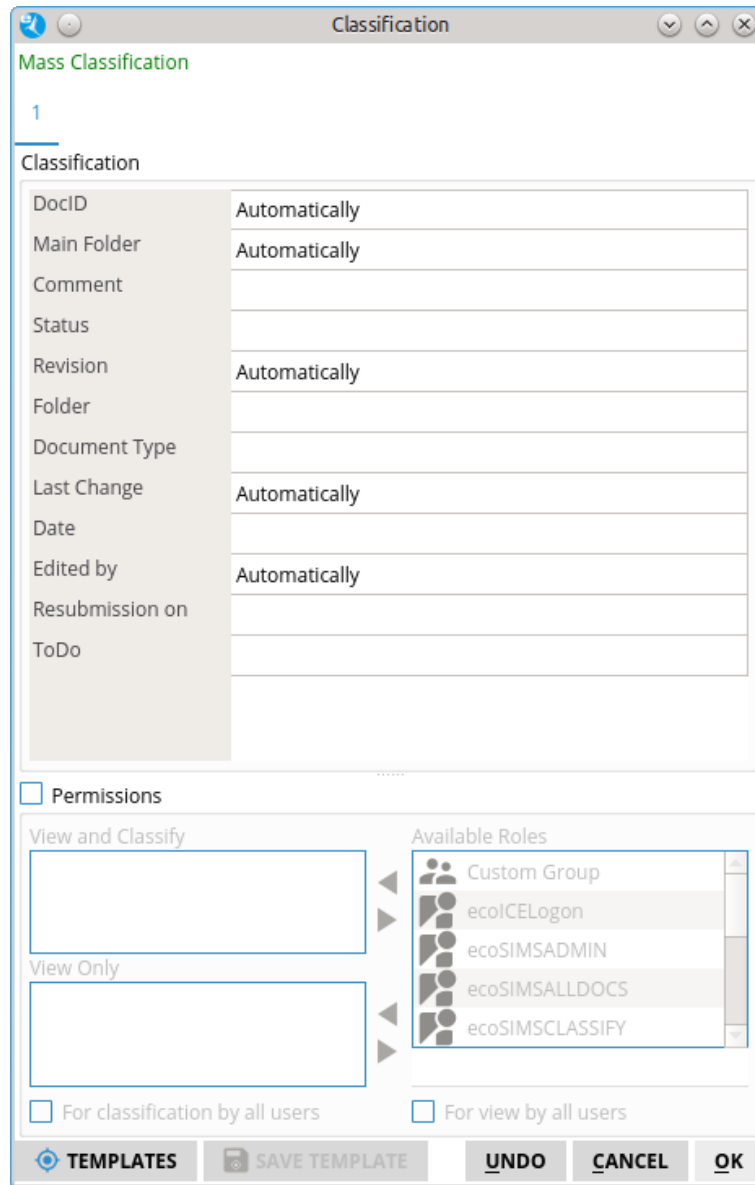
Figure 10.12: Mass Classification

10.5.2 Permissions in Mass Classification

Through mass classification you can align the permissions of the selected documents. This is an optional process. The permissions can also be omitted during mass classification. However, the user will always require a permission to classify the selected documents [6, 1, 7].

1. Start Mass Classification.

2. Activate the "Permission" by selecting the box.

3. Assign permissions as usual.

10.6 Multiple Classification

Multiple classification allows a document to be classified several times (internal linking) without repeatedly saving it to the archive. This allows you to deposit different classifications for one document. The document is saved once in the database, but it can be assigned any number of classifications in the user interface. For example, you can assign a file to various

folders in ecoDMS. The DocID for the document is then referenced several times in ecoDMS due to the different links [6, 1].

Figure 10.13: Icon - Classification
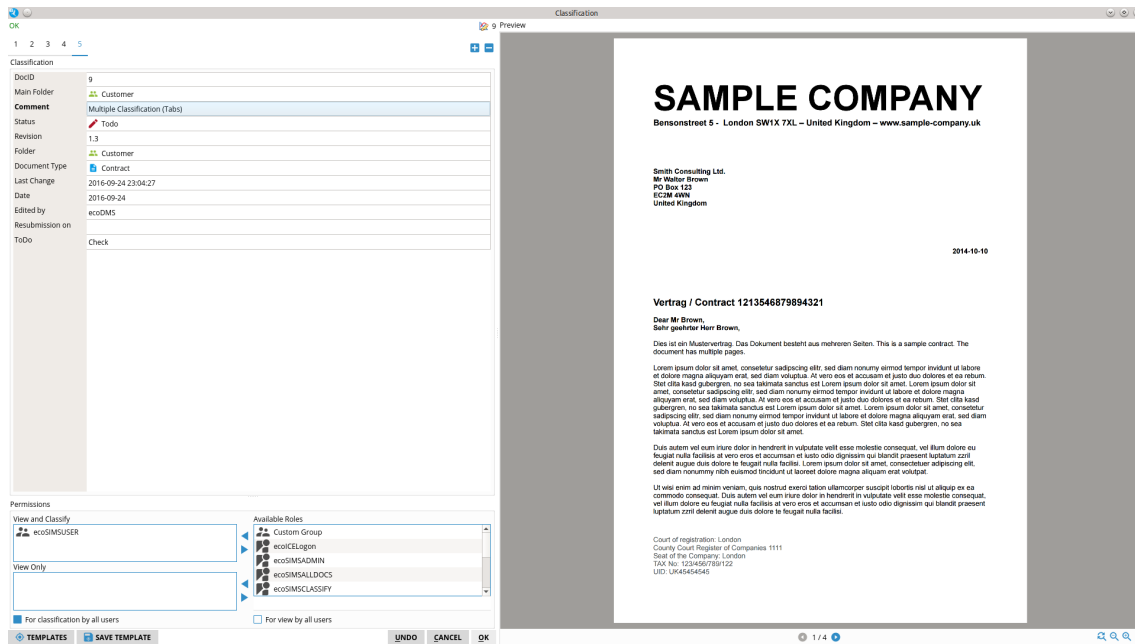
Figure 10.14: Multiple Classification

10.6.1 Multiple Classification / Add Tab

To assign additional classifications to a document, you must first create the document on separate tabs. You can edit and remove the tabs, if required, as long as you did not confirm the classification with "Save" or "OK". You can only edit and delete individual tabs until ecoDMS has saved and completed the classification. Editing a classification is still possible after saving. To do this, you require a permission for this classification entry. To delete such an entry, carry out the standard ecoDMS deletion process (delete function). To assign further classifications to a document, complete the following steps [6, 1]:

1. Select document in the ecoDMS table.

2. Select the "Classify" function. You have following options:

    a) Right-click one of the selected documents - Classify **or**

    b) Click the "Classify" icon in toolbar **or**

    c) Enter this shortcut: CTRL + K

3. Enter the Classification Information (if not yet available)

4. To add "Multiple Classification" click the icon "Add Multiple Classification".

    a) Another classification window opens as a tab

5. Enter the additional information

    a) If necessary, you can add as many tabs as you like.

6. Save classification with "OK", or cancel the process with "Cancel".

10.6.2 Multiple Classification / Remove Tab

To assign additional classifications to a document, you must first create the document on separate tabs. The tabs can be edited and also removed, if required, as long as the classification was not confirmed with "Save" or "OK". The individual tabs can only be edited and deleted until the classification has been saved and completed. Editing a classification is still possible after saving. To do this, the user requires a permission for this classification entry. To delete such an entry, carry out the standard ecoDMS deletion process (delete function). To remove a non-saved classification tab to a document, complete the following steps [6, 1]:

1. To remove "Multiple Classification" click the icon "Remove Multiple Classification".
   a) The selected "Tab" will be deleted.

2. Save classification with "OK", or cancel the process with "Cancel".

10.6.3 Show Multiple Classification

If "Multiple Classifications" were saved to a document the DocID for the respective document in ecoDMS is assigned several times. When you open the classification dialogue box for one of the multiple archived documents, the dialogue box shows all available tabs for which the user has permission [6].

1. Select document in the ecoDMS table.

2. Select the "Classify" function. You have following options:
   a) Right-click one of the selected documents - Classify **or**
   b) Click the "Classify" icon in toolbar **or**
   c) Enter this shortcut: CTRL + K

10.7 Table

In the table ecoDMS displays the searched documents with their associated classification attributes. The maximum number of listed documents in the table depends on the settings in the "Search Results (Max)" area (at the bottom right of the ecoDMS Client) and on the active filter, if any. Users can only see the documents for which they have a permission. The table is divided into several columns with information about the archived documents. This is where the classification attributes and their values are displayed. In addition to the classification dialogue box, the table can also be used to edit the individual entries.

Figure 10.15: Document table in ecoDMS Client

Figure 10.16: Table - Show/Hide Column(s)

Figure 10.17: Table - List of Attributes

10.7.1 Hide Columns

The columns display the available classification attributes. To hide columns, you do not need, complete the following steps [3]:

1. Right-click a column header in the table.

2. Select the "Show/Hide Columns" command

3. A list containing the available columns opens
    a) If the checkbox is disabled, the column is not displayed in the table.

10.7.2 Show Columns

The columns display the available classification attributes. To show columns, complete the following steps [3]:

1. Right-click a column header in the table.

2. Select the "Show/Hide Columns" command

3. A list containing the available columns opens
    a) If the checkbox is enabled, the column is displayed in the table.

10.7.3 Adjust Columns to Content

The columns display the available classification attributes. To manually adjust the column width to the content, complete the following steps [3]:

1. Right-click a column header in the table.

2. Select the "Adjust Columns to Content" command

3. The columns are adjusted to the current contents.

10.7.4 Adjust Columns to Content (Automatic)

The columns display the available classification attributes. To automatically adjust the column width to the content, complete the following steps [3]:

1. Right-click a column header in the table.

2. Select the "Adjust Columns to Content (Automatic)" command

3. The columns are automatically adjusted to the contents.

10.7.5 Show All Columns

The columns display the available classification attributes. If columns are hidden, you can show all the columns as follows [3]:

1. Right-click a column header in the table.

2. Select the "Show All Columns" command

10.8 Default Classification

You can define a default classification for your workplace. This is loaded by default when a document is scanned and loaded in in the Inbox. Please refer to chapter "Scanning & Archiving (Inbox)" for a detailed description [6, 3].

10.9 Undo Classification

You can undo a classification if necessary. All classification attributes of the selected document are then returned to the state it was last saved in.

– For newly archived documents all classification attributes are reset in this case.

– For already archived documents, the classification is reset to the last saved state.

To undo the classification of a document, complete the following steps [6]:

1. Classify an ecoDMS document via the classification dialogue box.

2. Click "Undo".

Important Information for Chapter 10

[1] *A document may only be classified if the user has a permission to classify the specified document.*

[2] *Administrators can define the appropriate classification attributes and mandatory fields for each document type via the Settings dialogue box. The display and order of the attributes therefore depends on the settings.*

[3] *Please note that these settings refer to the individual workstation and are not stored in the user profile.*

[4]   *The preview in the classification dialogue box is only displayed for PDF documents and files that are archived via the ecoDMS plug-ins or the PDF/A printer.*

[5]   *This feature requires a licence of the ecoDMS full version but can be tested during the time and is then automatically disabled until a full licence is activated.*

[6]   *Viewing and using this function requires specific system permissions.*

[7]   *We recommend you create and use user groups. This simplifies classification and assignment immensely.*

11 Classification Templates

Documents stored in ecoDMS can be automatically assigned according to specified attributes and also archived without requiring manual intervention from the user. This is made possible by the intelligent ecoDMS template designer. The template designer is a fixed component of the classification function. It automatically recognises incoming documents, sorts the data to the right place, automatically fills in the necessary meta data / classification attributes, and stores the data (as an option) automatically in ecoDMS in a dark process. Document recognition is based on pre-configured keywords, barcodes and/or layouts, which are saved in classification templates. This makes the classification and archiving processes easy to automate and optimise. You can use classification templates in different areas. Reading the templates depends on the file type, the content, and the readability and quality of the documents.

– Information: One classification template can be created in the Free4Three Edition.
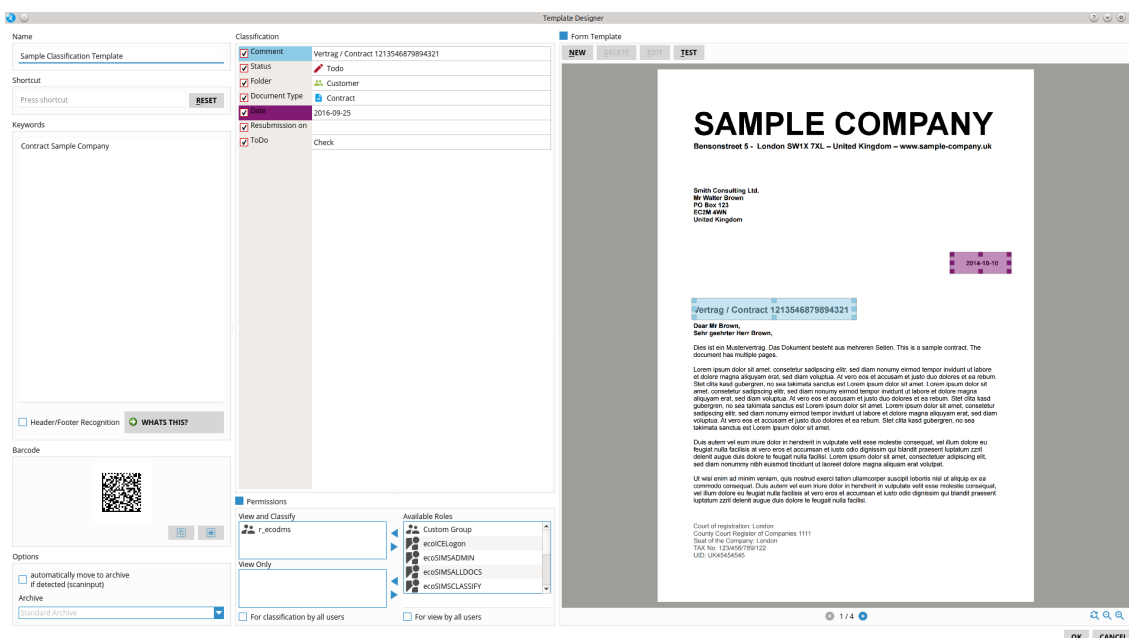
Figure 11.1: Template Designer

11.1 Basics

Templates have various applications. Template recognition depends on the file type, content and on the readability and quality of the documents.

11.1.1 Execution Types

1. PDF and TIFF files during standard and drag & drop archiving in ecoDMS (Windows, Ubuntu, Debian, MacOS),

2. PDF and TIFF files of documents scanned in via scaninput (Windows, Ubuntu, Debian, MacOS),

3. files archived via PDF/A Printers (Windows, Ubuntu, Debian),

4. files archived via Libre / OpenOffice Plugin (Windows, Ubuntu, Debian, MacOS),

5. files archived via MS Office Plugin, including Outlook (Windows),

6. files archived via Thunderbird Addon (Windows, Ubuntu, Debian)

11.1.2 Multiple Classification

If ecoDMS Archive recognises several classification templates for a document, it displays them on tabs as mass classification in the Classification dialogue box.

1. **Before** archiving, delete all classification tabs that do not apply.

2. Otherwise the document is archived with multiple classifications (mass classification).

3. The document number (DocID) would in this case occur several times and with different classifications in ecoDMS Archive.

4. The classification of the individual DocIDs depends on the retrieved classifications.

5. To avoid loading various classifications, we recommend you assign unambiguous criteria when creating your classification templates.

11.1.3 Template Types

Automatic document assignment is based on classification templates. A template specifies how the document is (automatically) stored / classified in ecoDMS. ecoDMS can differentiate between simple templates and form templates.

11.1.3.1 Simple Templates (Keyword Recognition)

1. Simple templates are based on keywords that must occur in the document to ensure the assignment is performed as specified.

2. The document layout is not considered in this case.

3. The user enters the keywords in the template designer, which ecoDMS saves as classification template.

11.1.3.2 Form Templates (Layout Recognition)

1. Form templates are based on layouts and positions in a document.

2. The user specifies the document layout in the template designer, which ecoDMS saves as template.

3. Moreover, the user can highlight fields in the document in colour.

4. The content of these fields is then included in the selected classification attributes.

11.1.4 Select Templates

You can assign templates manually to documents or let the system do this automatically.

1. You can select templates manually in the Classification dialogue box and use them for Classification.

2. The template recognition can also be started manually in the Inbox after scanning (e.g. for imported documents or documents scanned via TWAIN/WIA/SANE).

11.2 Simple Templates

ecoDMS can automatically classify documents based on their contents. To do so, ecoDMS needs to know the necessary keywords that occur in the document. You can enter the keywords in the template designer. If ecoDMS archives the document which matches the specified template criteria, the software automatically fills in the classification attributes according to your specifications.

To create a simple template (without additional form / layout recognition), please complete the following steps [3, 2]:

1. Open the classification dialogue box for any document.

2. Execute the "Save Template" function. To do this, you have the following options:

a) Click the "Save Template" button.

b) Right-click the mouse in the Permissions area and select "Save Classification as Template".

3. The Template Designer opens. To create a "simple template" with Keyword Detection, use the following fields:

4. **Name:** Enter a name for the template. Use the name to retrieve and recognise the template.

5. **Keyboard shortcut:** As an option, you can store a shortcut. You can use this shortcut later to open the "classification template" manually in the classification dialogue box.

a) Use the "Reset" button to remove the "shortcut".

6. **Automatic recognition:** You can only enable this field in combination with a "formula template". To create a pure "Keyword template" the function is not necessary.

7. **Keywords:** Enter the keywords to trigger the automatic "classification template". The "template" is only recognised and executed automatic if the document you are searching for contains exactly these keywords. If everything matches and recognition is successful, the classification information is loaded.

a) If you use several keywords, all keyword deposited in ecoDMS must exactly match the words in the document. Use unambiguous terms, e.g. the VAT-ID or the customer number of a company.

b) Enter keywords without a hyphen or a comma. The recorded words are " and" -linked.

c) For the detection, all detected items must be included in the document in the same notation.

d) Example: The document has the following contents. These contents are required for the application of the classification saved in the template. Enter the contents one by one:

```
UID: 123456789
Invoice
```

8. **Keywords expert function:** As an option, you can extend the keyword recognition with regular expressions. In this way, you can limit the search results even more accurately. Please use a separate line for each command: The following examples are a small extract from the many possibilities offered by calling a "REGEX":

a) Document contains "Invoice"

```
REGEX:\b(Invoice)\b
```

b) Document contains "Invoice" or "Delivery Note"

```
REGEX:\b(Invoice|Delivery Note)\b
```

c) Document does not contain "Contract"

```
!REGEX:\b(Contract)\b
```

d) Document contains "Invoice" but not "Contract"

```
REGEX:\b(Invoice)\b
!REGEX:\b(Contract)\b
```

e) You can also use a combination of REGEX and simple keywords.

9. **Options (for scaninput folder):** When creating a template, you can configure whether you want the document to be saved automatically in ecoDMS without manual action by a user.

a) To activate "Automatic archiving", you must enable the checkbox "If recognised, automatically store in archive" in the "Options" section of the Template Designer.

b) Then select the "Target archive".

   i. This process is exclusively possible for documents that have been retrieved via the "scaninput folder" and are successfully recognised by the template designer.

   ii. If several classification templates that have been assigned different target folders are recognised for a document, the document is not archived automatically. The document is opened in the Inbox.

iii. If this function is not enabled or the template is not automatically recognised, the scanned document is opened in the Inbox for manual classification and archiving.

10. **Classification:** Fill in the classification dialogue box in the Template Designer. Assign values that are saved as "classification template" and which you want to be used for Classification when the template is executed.

a) Enable the attributes you want to be accepted when the classification template is executed, by checking the boxes in the classification area. When the template is executed, only those attributes are overwritten, which are enabled in this area. All other attributes are not affected by the template.

11. **Permissions:** As an option, you can enable the Permissions for the "Classification Template". In this case the Permissions stored here are also used.

12. Save the template by clicking "OK" or cancel the operation with "Cancel".
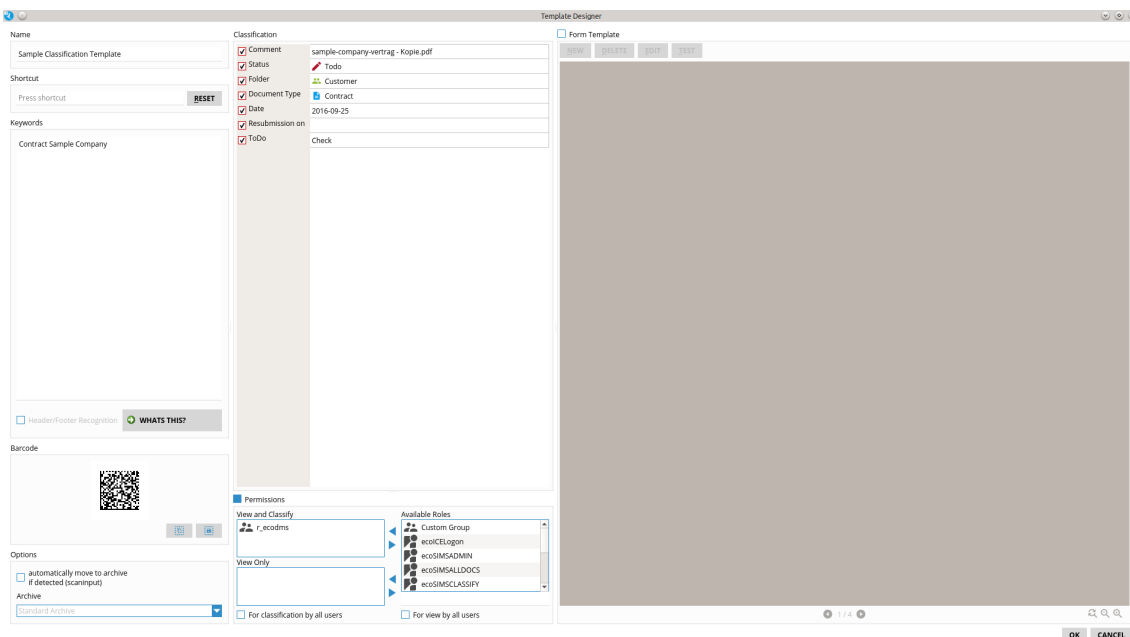
Figure 11.2: Classification Template - Simple Template

11.3 Form Templates

The contents of specific text zones in a document can be automatically used for classification. For example, you can let ecoDMS read the invoice number, the date or the company name from a document and enter them in the classification dialogue box. First, ecoDMS needs to know the position of the text zones you want to read in a document. To do this, select the required text zones in the template designer. When creating your classification template, use a PDF document as a master for layout and content. In the template designer, you can then select the required text zones and assign the content of each text zone to a classification attribute. If ecoDMS archives the document which matches the specified template criteria, the software automatically fills in the recognised attributes.

To transfer the classification attributes with the form template, complete the following steps:

1. Open the classification dialogue box for the document which you require as template for the future "form recognition". Make sure the document is archived as PDF format. Otherwise the preview for the Form Template cannot be displayed.

2. Execute the "Save Template" function. To do this, you have the following options:

a) Click the "Save Template" button. **or**

b) Right-click the mouse in the Permissions area and select "Save Classification as Template".

3. The Template Designer opens. To create a Form Template, complete the following steps:

4. **Enable the Form Template checkbox.**

5. **Name:** Enter a name for the template. Enter a name to retrieve and recognise the template.

6. **Keyboard shortcut:** As an option, you can store a shortcut. You can use this shortcut later to open the "classification template" manually in the classification dialogue box.

    a) Use the "Reset" button to remove the "shortcut".

7. **Header / Footer Recognition:** This checkbox can only be enabled in combination with a form template. The Form Template option must therefore be enabled. If this option is enabled, ecoDMS reads the header and footer of a document in the background and saves it as an essential property for recognising the classification template.

    a) Depending on the resolution and the quality, approx. 10 - 20 percent of the upper and the lower part of a document are stored in the template as identifying feature.

    b) If no other criteria (keywords) are stored, the header and footer of the document must match the template to execute automatic pre-classification.

    c) If you want to enter additional keywords, the keywords and the headers and footers must match the template for the template to be recognised.

8. **Keywords (optional):** As an option, you can enter the keywords which, in addition to the layout, are prerequisite for template recognition. The "template" is only recognised and executed if the document, in addition to the layout, contains exactly those keywords. In case of a successful match and recognition, the stored classification information is loaded.

    a) If you use keywords, all keyword deposited in ecoDMS must exactly match the words in the document. Use unambiguous terms, e.g. the VAT-ID or the customer number of a company.

    b) Enter keywords without a hyphen or a comma. The recorded words are " and" -linked.

    c) For the detection, all detected items must be included in the document in the same notation.

    d) Example: The document has the following contents: These contents are required for the application of the classification saved in the template. Enter the contents one by one:

    ```
    UID: 123456789
    Invoice
    ```

9. **Keywords expert function:** As an option, you can extend the keyword recognition with regular expressions. In this way, you can limit the search results even more accurately. Please use a separate line for each command: The following examples are a small extract from the many possibilities offered by calling a "REGEX":

    a) Document contains "Invoice"

    ```
    REGEX:\b(Invoice)\b
    ```

    b) Document contains "Invoice" or "Delivery Note"

    ```
    REGEX:\b(Invoice|Delivery Note)\b
    ```

    c) Document does not contain "Contract"

    ```
    !REGEX:\b(Contract)\b
    ```

    d) Document contains "Invoice" but not "Contract"

    ```
    REGEX:\b(Invoice)\b
    !REGEX:\b(Contract)\b
    ```

    e) You can also use a combination of REGEX and simple keywords.

10. **Options (for scaninput folder):** When creating a template, you can configure whether you want the document to be saved automatically in ecoDMS without manual action by a user.

    a) To activate "Automatic archiving", you must enable the checkbox "If recognised, automatically store in archive" in the "Options" section of the Template Designer.

    b) Then select the "Target archive".

        i. This process is exclusively possible for documents that have been retrieved via the "scaninput folder" and are successfully recognised by the template designer.

        ii. If several classification templates that have been assigned different target folders are recognised for a document, the document is not archived automatically. The document is opened in the Inbox.

        iii. If this function is not enabled or the template is not automatically recognised, the scanned document is opened in the Inbox for manual classification and archiving.

11. **Classification:** Fill in the attributes in the classification area. Assign the values which you want to save for the classification. Then enable the attributes you want to be accepted when the classification template is executed, by checking the boxes in the classification area. When the template is executed, only those attributes are overwritten, which are enabled in this area. All other attributes are not affected by the template.

    a) You can enter the values manually **or** let the system read the values automatically using the coloured fields in the document.

12. **Permissions:** As an option, you can enable the Permissions for the "Classification Template". In this case the Permissions stored here are also used for Classification.

11.3.1 Define Positions

The contents of specific text zones in a document can be automatically used for classification. For example, you can let ecoDMS read the invoice number, the date or the company name from a document and enter them in the classification dialogue box. First, ecoDMS needs to know the position of the text zones you want to read in a document. To do this, select the required text zones in the template designer. When creating your classification template, use a PDF document as a master for layout and content. In the template designer, you can then select the required text zones and assign the content of each text zone to a classification attribute. If ecoDMS archives the document which matches the specified template criteria, the software automatically fills in the recognised attributes.

To specify the required text zones in the form and their classification details, complete the following steps:

1. Click "New" in the Form Template area. The Form Template dialogue box opens:

2. Select the appropriate attribute from the list of available attributes .

    a) Click the "Colour" box to specify a colour. This is then used when selecting and applying the field information. Tip: Assign a different colour to each attribute!

    b) Confirm your selection with "OK" or cancel the operation with "Cancel".

3. Depending on the classification attribute, you can also make additional settings. To do so, enable the "Options" setting.

    a) **Valid characters:** You can define characters in the highlighted area that ecoDMS should include in the classification. Specify the associated positions immediately after saving the changes to the dialogue box. When reading each position in the document, ecoDMS only transfers the specified characters for this attribute. Enter the valid characters without separators, blanks, or similar. All characters you enter are declared as allowed and authorised values; this also includes blanks.

        i. If you only want to transfer numbers from the highlighted area, enter the valid numbers.

        A. Example values for valid characters:

```
0123456789
```

        B. Example contents in a document:

```
ABC#1234 ecD24!
```

        C. Result for the classification when including the allowed characters:

```
123424
```

    ii. If you only want to transfer numbers from the highlighted area, enter the valid letters. Please note the upper/lower case format.

       A. Example values for valid characters:

```
AaBbCcDdEeFfGg
```

       B. Example contents in a document:

```
ABC#1234 ecD24!
```

       C. Result for the classification when including the allowed characters:

```
ABCecD
```

    iii. A combination of numbers, letters and special characters, etc, is also possible.

b) **Valid characters - Expert function (optional):** As an option, you can automatically read any text zones in a document with ecoDMS using regular expressions. The content you want to read need not be in the same position. However, it must occur in the area you highlighted. Specify the area immediately after saving the changes to the dialogue box. By using REGEX, you can, for example, search for the invoice total in a document and let ecoDMS transfer this for the classification. Please note that you can only use the REGEX function here for free-text classification attributes. Also, make sure you write each command in a separate line. The following examples are a small extract from the many possibilities offered by calling a "REGEX":

    i. You want to transfer the net total of an invoice for the classification. To do this, ecoDMS must search for the value in the document, which is located behind the word "Net Total:".

```
REGEX:(?<=Net Total:)([\s]*)\d{1,8}([\.,]\d{2})
```

       A. The document, for example, contains: Net Total: 289.95

       B. The output for the classification in this example is: 289.95

```
(?<=Net Total:) searches the character string that follows "Net Total:"
([\s]*) Wildcard for one or more spaces
\d{1,8}([\.,]\d{2} Wildcard for an amount separated by a comma
```

    ii. You want ecoDMS to transfer the term following the word "Name".

```
REGEX:(?i)(?<=Name)([\s]*)\b([\S]*)\b
```

       A. The document, for example, contains: Name Doe

       B. The output for the classification in this example is: Doe

```
(?i) ignores upper/lower case format
(?<=Name) searches for the character string that follows "Name"
([\s]*) Wildcard for one or more spaces
\b([\S]*)\b Wildcard for the following term until the next space
```

c) **Selection is a barcode:** Enable this setting if the area you want to read is a barcode. The content saved in the barcode is then transferred as the attribute value. The form recognition function reads the content of barcodes and of 2D barcodes.

4. A box displays in the document preview in the colour you selected earlier. Position the box in the area of the document which you want to read and apply for the selected attribute. Make sure that the box frames the exact amount of information you need.

    a) You can adjust the height and the width of the box. To do so, drag the outer points of the box.

    b) Use the "Zoom" icons to zoom the preview.

    c) Hold the right mouse button to select and zoom in on areas.

    d) Double-click the preview to fit the page to the window.

5. Click "Test" to check the form.

   a) The recognised content is entered as a test in the Classification of the Template Designer.

6. You can repeat this process for any further attributes.

7. Save the template by clicking "OK" or cancel the operation with "Cancel".
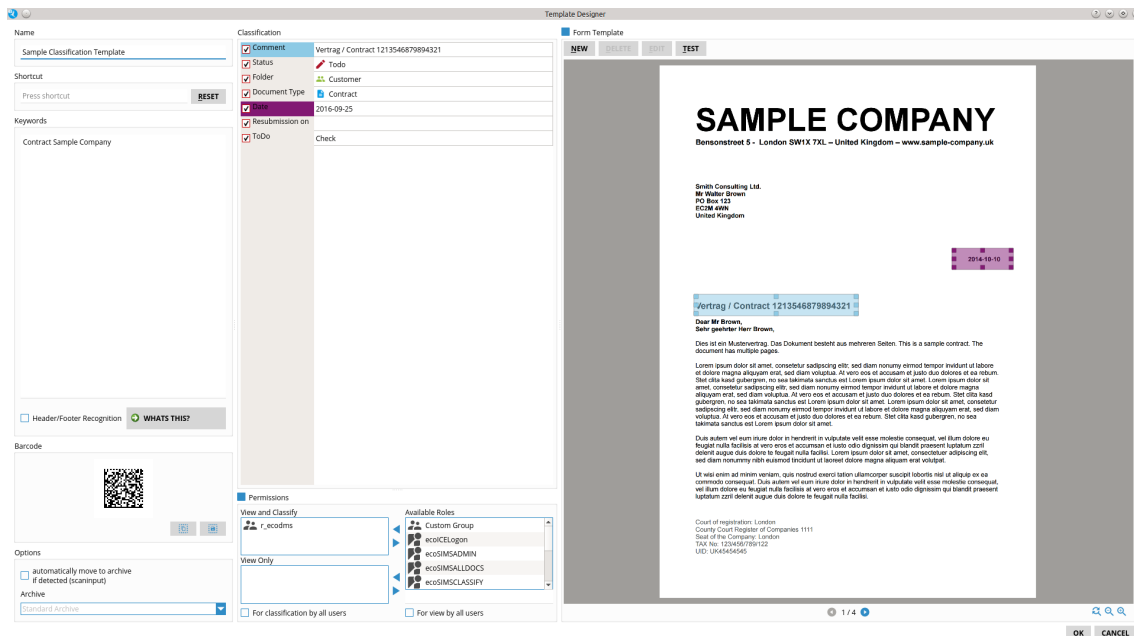
Figure 11.3: Classification Template - Form Template

11.4 Barcodes

When creating a template, a barcode is automatically generated. The barcode contains the name of the template and calls the template upon recognition. As a rule, the barcodes are used for "returned document", i.e. for documents which are created "in-house" and then return signed, for example. Barcodes are read via the Scaninput folder [3, 2].

1. Open the classification dialogue box for any document.

2. Execute the "Save Template" function. To do this, you have the following options:

   a) Click the "Save Template" button.

   b) Right-click the mouse in the Permissions area and select "Save Classification as Template".

3. **Name:** Assign a name.

   a) If you assign a name to a template, a barcode is automatically generated in the "Barcode" area.

4. Create a classification template according to your requirements (simple template and/or form template).

5. **Barcode:** To use the 2D barcode you generated, you have the following options:

   a) Copy the barcode to the clipboard

   b) Save Barcode As... (*.JPG)

6. Save the template by clicking "OK" or cancel the operation with "Cancel".
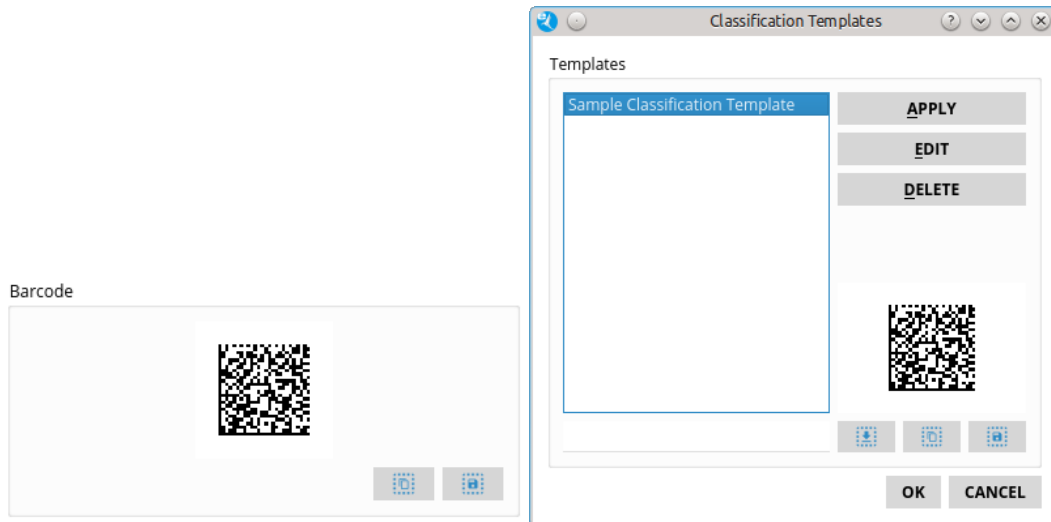
Figure 11.4: Barcode after saving a template (Template Designer)

11.5 Dark Process

As an option, existing and successfully recognised classification templates can be processed in a dark process. In this case, users can archive the documents together with the matching classification information in ecoDMS, without having to do anything.

- – This process is exclusively possible for documents that have been retrieved via the "scaninput folder" and are successfully recognised by the template designer.

- – If several classification templates that have been assigned different target folders are recognised for a document, the document is not archived automatically. The document is opened in the Inbox.

To enable the Dark Process, complete the following steps: [3, 2]:

1. Create a classification template with the ecoDMS Template Designer.
    a) If you want to activate the "Dark process" for an existing template, you can open the template for editing and configure it accordingly.

2. To activate "Automatic archiving", you must enable the checkbox "If recognised, automatically store in archive" in the "Options" section of the Template Designer.
    a) Then select the "Target archive".

3. Click the "OK" button to save the template.
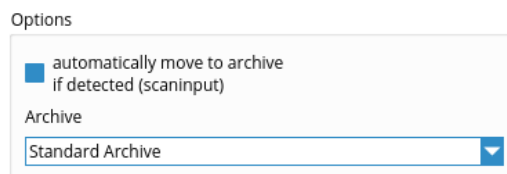
Figure 11.5: Template Designer - Automatic Archiving

11.6 Template Management

You can access the template management via the classification dialogue box of any document.

11.6.1 Open Management

1. Open the classification dialog for any document.

2. Click "Templates" to open the template management.

11.6.2 Apply Template

Template recognition is either automatically executed by the system (depending on the settings and on the document) or through manual selection. The following options are available to manually retrieve a template [3, 1, 2]:

1. Open the classification dialogue box for the document you need. You have following three options:

    a) Click the "Templates" button in the classification dialogue box, select the template from the template management, and click "Apply".

    b) Right-click the mouse in the Permissions area and then click "Templates" to select the template

    c) Enter the keyboard shortcut (if available) for the classification template you need

2. The classification saved for the template is applied.

11.6.3 Delete Template

To delete a template, complete the following steps [3, 1, 2]:

1. Open the classification dialogue box to any document.

2. Click "Templates".

3. Select the template you want to delete.

4. Click "Delete".

5. Save process with "OK" or click "Cancel" to cancel.

11.7 Switch Folder Recognition On / Off

The keywords deposited in the folder structure can also be used for automatic pre-classification. If a document is scanned and archived via the printer driver or via the Office Plugin, and no template is recognised, the document can still be assigned to the respective folder using the keywords. Folder recognition can be configured for each workstation.

1. Enter the appropriate keywords for the folders in the Settings dialogue box (refer to the "Settings" chapter).

2. Open the classification dialogue box to any document.

3. Right-click the Permissions area in the classification dialogue box.

4. Click the "Options" function.

5. Enable or disable the function with the "Keyword Recognition (Folder)" checkbox.
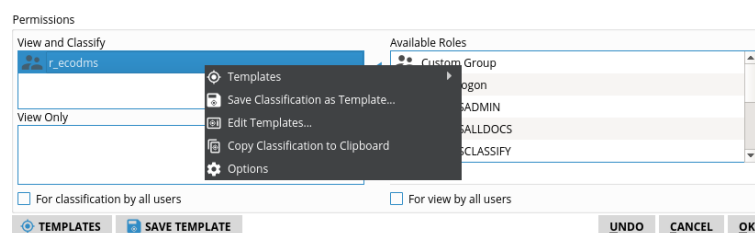
Figure 11.6: Classification - Permissions - Right Click
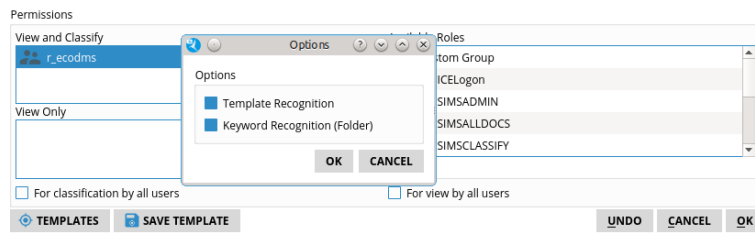
Figure 11.7: Classification: Switch on/off Folder and Template Recognition

11.8 Switch Template Recognition On / Off

Template recognition can be configured for the PDF/A Printer, email Addons and Office Plugins on each workstation.

1. Open the classification dialogue box to any document.

2. Right-click the Permissions area in the classification dialogue box.

3. Click the "Options" function.

4. Enable or disable the function with the "Template Recognition" checkbox.
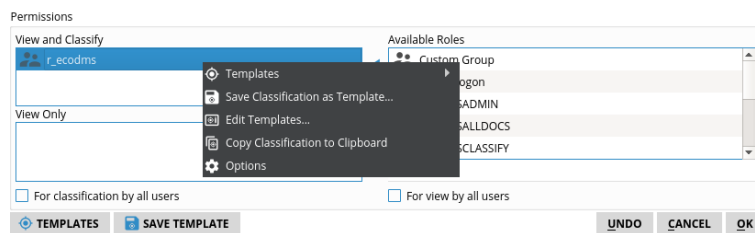
Figure 11.8: Classification - Permissions - Right Click
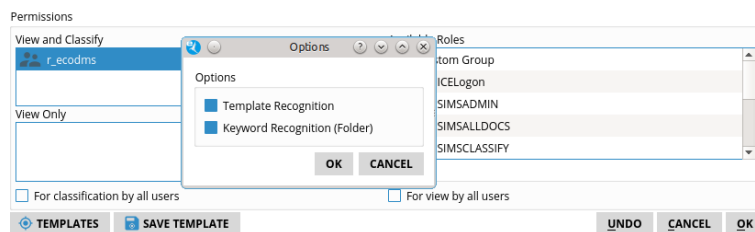
Figure 11.9: Classification: Switch on/off Folder and Template Recognition

Important Information for Chapter 11

[1] *A document may only be classified if the user has a permission to classify the specified document.*

[2] *This feature requires a licence of the ecoDMS full version but can be tested during the time and is then automatically disabled until a full licence is activated.*

[3] *Viewing and using this function requires specific system permissions.*

12 Searches and Filters

ecoDMS has various search and filter functions. You can retrieve documents, meta data, classification information and notes by entering specific search criteria. The individual search and filter functions are described in this chapter.

12.1 Basics

- A search continues until the process is cancelled via the X icon in the search line. To reset all enabled filters, click the icon with the crossed out circle on the toolbar.

- By default, the system uses optical character recognition OCR on all text documents. This functionality is firmly built into ecoDMS.

- In addition, ecoDMS converts unreadable data such as not read PDFs, JPGs, PNGs and TIFFs (if possible) automatically into readable PDF/A files. Therefore, text from these files may also be included in the full text search.

- There are, for example search queries using the full text recognition, searches within the generated folder structure and on the basis of the stored classification and notes information possible.

- ecoDMS recognises the content depending on the document resolution, format and quality.

- ecoDMS simultaneously indexes the meta data, classification attributes and notes.

- The documents and information must be readable for the system.

- Please note that we cannot guarantee 100 percent accuracy. The recognition depends on the contents and quality of your documents, information and files.

- If you want to search for document content and simultaneously for Classification Attributes and Notes, you must enable the Advanced Full-Text Search.

- The user can enter the search terms into the search line and the matching results are returned in the table.

12.2 End Search

1. A search is active until the operation is closed with a click on the x-icon in the search line.

2. To reset all active filters, click on the icon with the circle and white bar in the toolbar.

Figure 12.1: Search Line - Stop Active Search (x-icon)

Figure 12.2: Icon - Reset All Active Filters

12.3 Full-Text Search

The full-text search enables a search for document content and for classification attributes. The documents must be readable. However, we cannot guarantee 100 percent accuracy. The user can enter the search terms into the search line and the matching results are returned in the table [2].

12.3.1 Simple Full-Text Search

1. Select the command "Full-text" from the list in the search area.

2. Enter one or more words contained in the document you are searching for. For example:

```
Invoice Sample Company
```

3. To start the search confirm your entry with "Enter" or click the "Search" button.

   a) The system displays all search results where the words you are searching for are found with the same spelling.

   b) If a document preview exists for a retrieved file, the recognised words are highlighted in colour in the preview window. If a keyword occurs several times within a document, ecoDMS Archive also gives an overview of all occurrences of the keyword in the preview window.

4. A search is active until the operation is closed with a click on the x-icon in the search line. To reset all active filters, click on the icon with the circle and white bar in the toolbar.
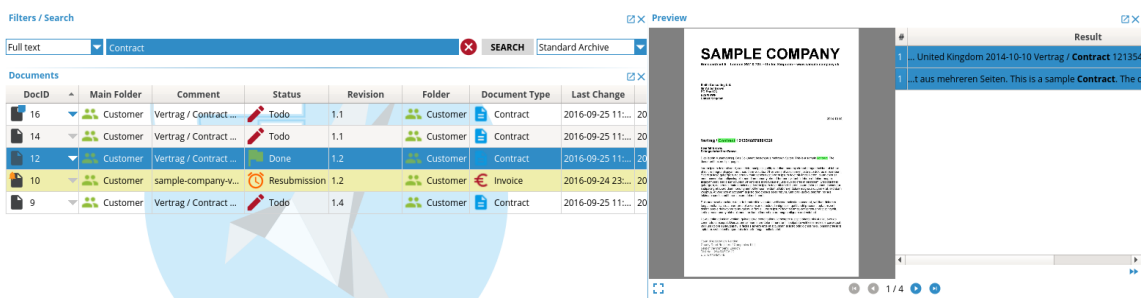
Figure 12.3: Full Text Search - Simple

12.3.1.1 Highlight detected Search Terms

If a document preview exists for a retrieved file, the recognised words from the simple full-text search are highlighted in colour in the preview window. If a keyword occurs several times within a document, ecoDMS Archive also gives an overview of all occurrences of the keyword in the preview window. Click the required passages to open them [3, 1].

1. Right click the preview window

   a) Disable the function by removing the check mark in "Highlight Search Results".

   b) Enable the function by setting the check mark in "Highlight Search Results".
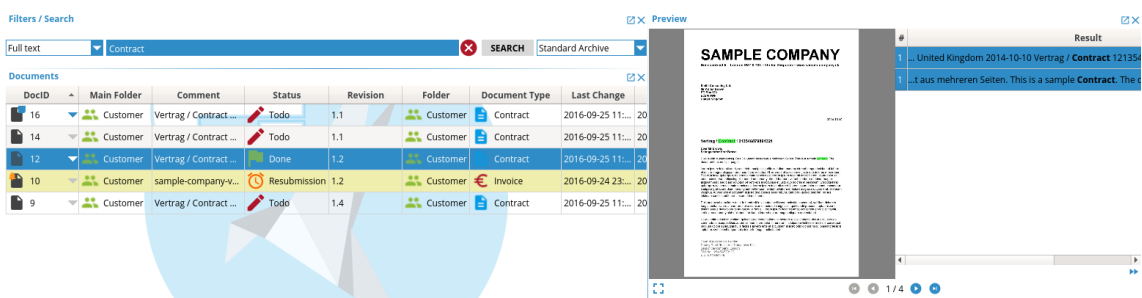
Figure 12.4: Full Text Search - Simple - Highlight detected Search Terms

12.3.2 Wildcard Search

Wildcards are placeholders and are represented by a question mark (?) or an asterisk (*).

1. In the search line, select "Full text" from the dropdown menu.

2. Enter one or more words that are contained in the file you are searching for. To do so, use wildcards.

   a) **Question mark (?):** This character replaces a letter and is used if, for example, the notation is unclear. For example:

   ```
   Me?er
   ```

   i. In this case, ecoDMS, for example, searches for words like "Mejer", "Meier", "Meyer"... . .

   b) **Asterisk (*):** Enter the asterisk if more values are to follow the entered values. For example:

   ```
   Test*
   ```

   i. In this case, ecoDMS searches for words starting with "Test" with any ending (e.g. testing, test-interval, tester...).

3. Confirm your entry with "Enter" or click the "Search" button to start the search.

   a) ecoDMS displays all results that match the search and contain all content.

4. A search continues until the process is cancelled via the X icon in the search line. To reset all enabled filters, click the icon with the crossed out circle on the toolbar.
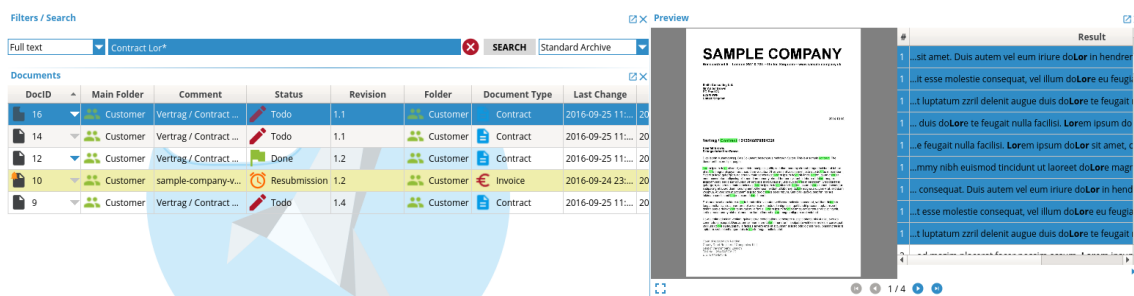
Figure 12.5: Full Text Search - Wildcard

12.3.3 Fuzzy Search

This function is a "fuzzy search". If a simple full-text search does not return the required result, we recommend this search function as an alternative.

1. In the search line, select "Full text" from the dropdown menu.

2. Enter one or more words that are contained in the file you are searching for. To do so, use "fuzzy logic" technology.

   a) **Tilde character (~):** Place the tilde character **at the end** of a word and perform a fuzzy search to search for words that are similar to the entry. For example:

   ```
   Meier~
   ```

   i. The search now focuses on documents which, for example, contain words like "Meier", "Meyer", "Maier".

3. Confirm your entry with "Enter" or click the "Search" button to start the search.

   a) ecoDMS displays all results that match the search and contain all content.

4. A search continues until the process is cancelled via the X icon in the search line. To reset all enabled filters, click the icon with the crossed out circle on the toolbar.
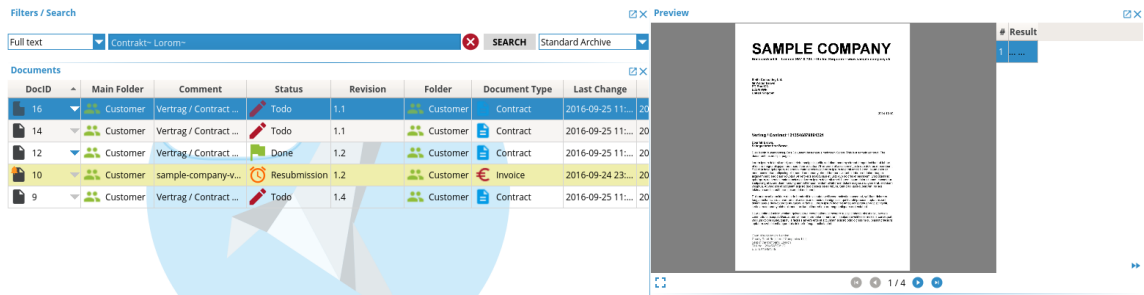
Figure 12.6: Full Text Search - Fuzzy Search

12.3.4 Boolean Operators

Use "Boolean factors" to create various operators such as AND, OR, +, - . Enter operators in capitals for searching in ecoDMS.

1. In the search line, select "Full text" from the dropdown menu.

2. Enter one or more words that are contained in the file you are searching for. To do so, use "boolean operators" technology.

   a) **OR:** Connect two words with this command to search either for one or the other word. For example:

   ```
   Sample OR Demo
   ```

       i. This search entry searches for files that contain either the word "Sample" or the word "Demo".

   b) **NOT / - :** Use these commands if you want to search for a file which does not include a specified word. Use either the value "NOT" or the value "-". Place the minus symbol directly before the word you want to exclude. For example:

   ```
   Sample NOT Demo
   ```

   ```
   Sample -Demo
   ```

       i. These search entries search for files that contain the word "Sample" but not the word "Demo".

   c) **AND / + :** These commands are used for an AND operation. The search terms connected with AND are all be contained in the file. You can either use the value "AND" or the value "+". Place the plus symbol directly before the words you want to include in the search. For example:

   ```
   Sample AND Demo
   ```

   ```
   +Sample +Demo
   ```

   d) This search entry searches for files that contain the word "Sample" and the word "Demo".

       i. **If you only enter search terms, without using +, -, OR or AND, the search terms are connected with AND.**

3. Confirm your entry with "Enter" or click the "Search" button to start the search.

   a) ecoDMS displays all results that match the search and contain all content.

4. A search continues until the process is cancelled via the X icon in the search line. To reset all enabled filters, click the icon with the crossed out circle on the toolbar.
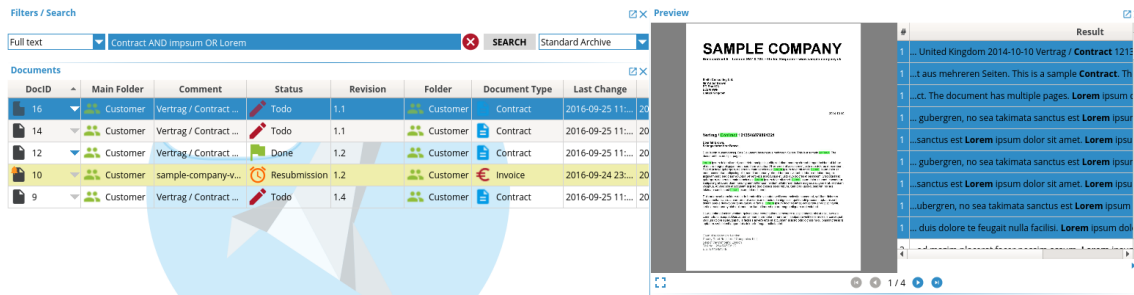
Figure 12.7: Full-Text Search: Boolean Operators

12.4 Advanced Full Text Search

ecoDMS also recognises the meta data of a file, the available classification information and notes created in the archive. These can also be included in the search by enabling the extended full-text search. The Advanced Full Text Search includes Classification Attributes and Notes in addition to the contents of documents. If you want to search for document content and simultaneously for Classification Attributes and Notes, you must enable the Advanced Full-Text Search. You have several options to activate the Advanced Search.

1. Click the menu "Options - Advanced Search" **or**

2. Select the toolbar icon Advanced Search **or**

3. Enter this shortcut: Ctrl + Shift + V

Figure 12.8: Icon - Advanced Search

12.5 Shortcut Search

With a user-defined keyboard shortcut, users can start the ecoDMS full-text search from any application [3].

12.5.1 Process Shortcut Search

Users only need to select the required search term in a software programme (e.g. web browser, email client, Office files, etc.) and then enter a specified shortcut. Entering the shortcut starts the full-text search in the ecoDMS client. The system searches through the archived documents for the selected terms. The matching search results are immediately displayed in ecoDMS Archive.

12.5.2 Change Shortcut

The shortcut can be created individually for each profile in the Connection Manager. Complete the following steps:

1. Open the Connection Manager.

2. Enter the desired shortcut in the "Shortcut Search" field.

3. Save the profile.

12.5.3 Reset Shortcut

To reset your shortcut, complete the following steps:

1. Open the Connection Manager.

2. Click "Reset" in the shortcut line.

   a) ecoDMS clears your input, so you can enter a new shortcut.

3. Save the profile.

12.6 Advanced Search

Use the Advanced Search (Combined Search) to combine different search criteria, for example, status, date, document type, full text, etc. This allows the user to simultaneously search for various classification attributes and full text terms. If necessary, search requests can also be saved as filter templates [2].

12.6.1 Open Advanced Search

To open the Advanced Search, you have the following options:

1. Select the entry Advanced Search from the list in search line **or**

2. Click the icon "..." in the Filter Templates window.

3. Enter the search criteria in the Advanced Search dialogue box.

Figure 12.9: Advanced Search

12.6.2 Define Search Criteria and Start Search

1. Open the Advanced Search dialogue box.

2. If there is no entry, click the "Add Criterion" button.

3. **Field:** Select the attribute / command for which you want to search (e.g. document type). ecoDMS displays the available classification attributes and search functions.

4. **Operator:** Specify the operator you want to include in the search. The available operators for each field are different.

5. **Value:** Here you define the search criterion. You can select from the values that belong to the "Field" (e.g. the folder structure or a list with all document types).

6. **MS:** This button stands for "Multiple Selection" and introduces an OR operation.

7. Click "MS"

    a) Click "Add Value"

    b) Select the value you want to use in the OR operation (you can repeat this operation as often as you like)

    c) To accept the values, click "OK" or cancel the process with "Cancel".

        i. The OR operation is now displayed in the Advanced Search

8. To add more search criteria, click the "Add Criterion" button

    a) To delete a search row, click the "Remove" button

9. Steps 3-7 can be repeated any number of times for a search query.

10. Start the search by clicking "OK". To cancel the operation, click "Cancel".
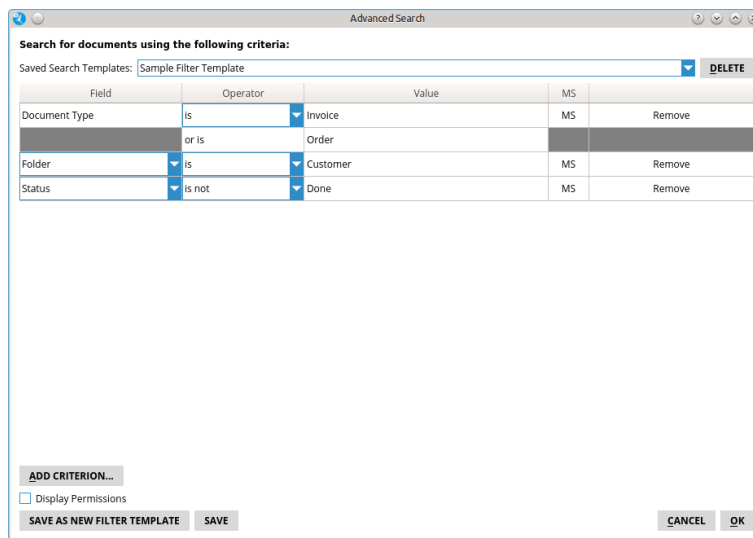
Figure 12.10: Advanced Search
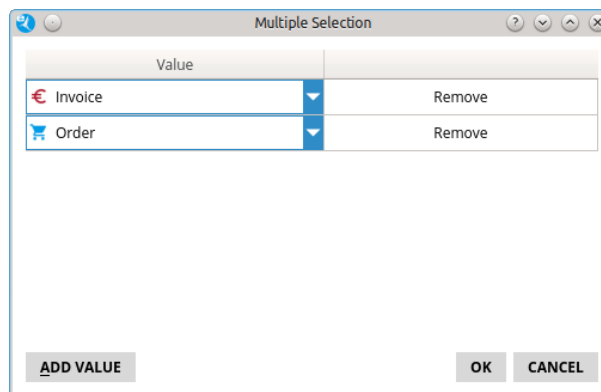
Figure 12.11: Advanced Search - Multiple Selection

12.6.3 Remove Search Criteria

1. Open the Advanced Search dialogue box.

2. Select the search line you want to delete.

3. Click on the corresponding "Remove" button.

4. Start the search by clicking "OK". To cancel the operation, click "Cancel".
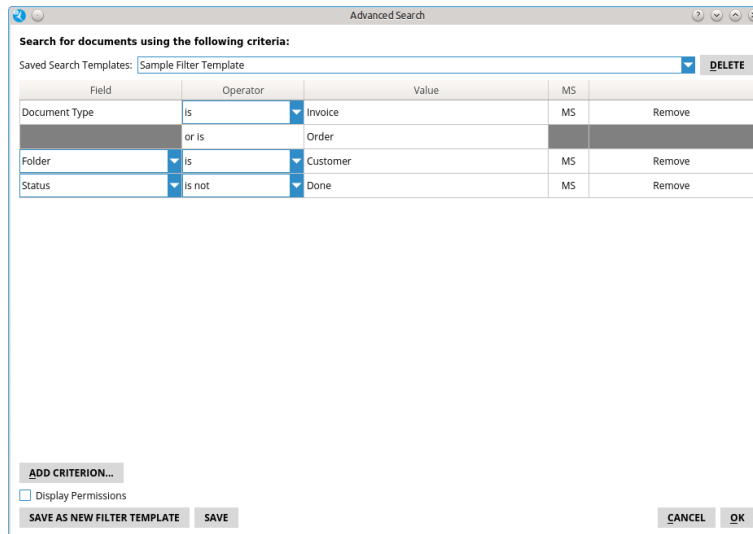
Figure 12.12: Advanced Search

12.6.4 Clear Search

If you want to clear the dialog Advanced Search, so that a completely new search can be started, complete the following steps:

1. Open the Advanced Search dialogue box.

2. Select an empty entry in the dropdown menu "Saved Filter Templates".

3. The list is cleared.

4. Enter the new search criteria (see "Define Search Criteria and Start Search")

5. Start the search by clicking "OK". To cancel the operation, click "Cancel".

12.6.5 Delete Search

To delete a saved search, complete the following steps:

1. Open the Advanced Search dialogue box.

2. Select the matching search in the dropdown menu "Saved Filter Templates".

3. Click the button "Delete".

12.6.6 Save as New Filter Template

You can save queries as filter templates with the Advanced Search function. Please read the section "Filter Templates".

12.6.7 User Example

- **Situation:**
  - You want to display unpaid incoming and outgoing invoices of Joe Bloggs Ltd. between May 1, 2012 and May 31 2012.
- **Solution:**
  1. Open the Advanced Search dialogue box

2. Select the Document Type attribute

3. Select the "is" value in the "Operator" column.

4. Now select the value "Outgoing Invoices"

5. To also include incoming invoices, click the "MS" button (MS= Multiple Selection)

    a) Click "Add Value" and select the value "Incoming Invoices"

    b) Confirm your entry with "OK".

6. Now click "Add" at the bottom left in the dialogue box

    a) This adds a new search row where you can enter the following values

7. Select the Status attribute in the "Field" column

8. Select the "is not" value in the "Operator" column.

9. Select "Done" in the "Value" column

10. Now click "Add Criterion" at the bottom left in the dialogue box

    a) This adds a new search row where you can enter the following values

11. Select the "Folder" attribute in the "Field" column

12. Select the "is" value in the "Operator" column.

13. Select the folder "Joe Bloggs"

14. Now click "Add Criterion" at the bottom left in the dialogue box

    a) This adds a new search row where you can enter the following values

15. Select the "Date" attribute in the "Field" column

16. Select the "Greater than or equal to" value in the "Operator" column.

17. Select the value "01.05.2016" as date.

18. Now click "Add Criterion" at the bottom left in the dialogue box

    a) This adds a new search row where you can enter the following values

19. Select the "Date" attribute in the "Field" column again

20. Select the "Less than or equal to" value in the "Operator" column.

21. Select the value "31.05.2016" as date.

If you start the search now, ecoDMS displays the required documents.

12.7 Filter Templates

The extended search requests (Advanced Search) can be saved as filter templates for one or more users, if required. The saved searches can then be selected on demand from the window "filter templates". The system differs between "My Filter Templates" and "Global Filter Templates". In addition, the filters can also be used for the Data Export [2].
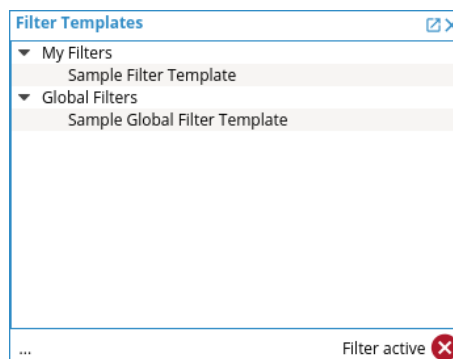
Figure 12.13: Window - Filter Templates

12.7.1 My Filter Templates

User-defined filters are created by the user and can only be seen by the individual user [2].

1. Open the Advanced Search function as described in the chapter "Search - Advanced Search".

2. Enter the search criteria for the Advanced Search.

3. Click "Save New Search" to save the search criteria

4. Enter a name for the filter in the dialogue box.

5. Confirm your entry with "OK". To cancel the operation, click "Cancel".

6. In the "Filter Templates" window, the search is displayed in the "My filters" area and can be executed with a double-click.
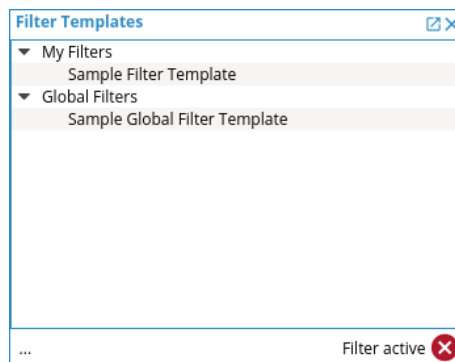
Figure 12.14: Window - Filter Templates
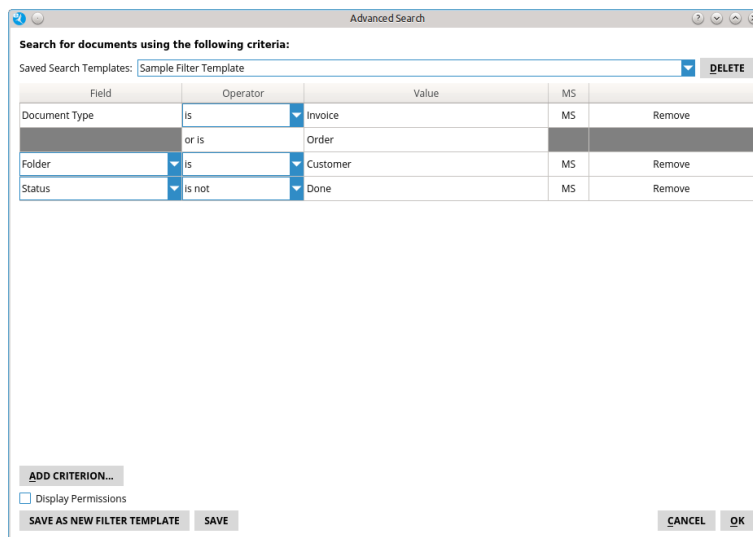
Figure 12.15: Advanced Search

12.7.2 Global Filter Templates

Global filters are created by the administrator and are enabled for specific roles (users / groups) [4, 2].

1. Open the Advanced Search function as described in the chapter "Search - Advanced Search".

2. Enter the search criteria for the Advanced Search.

3. Enable the "Display permissions" checkbox

a) The responsibilities area opens. Here you can specify who should receive the filter.

     i. Move the desired user / group from the "Available Roles" via drag and drop to the "Assigned Roles".

b) To display a filter to all users, enable the "For view by all users" checkbox.

4. Click "Save New Search" to save the search criteria

5. Enter a name for the filter in the dialogue box.

6. Confirm your entry with "OK". To cancel the operation, click "Cancel".

7. In the "Filter templates" window, the search is displayed in the "Global filters" area for all selected users / groups and can be executed with a double-click.
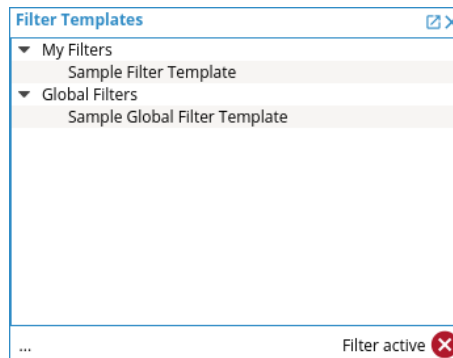
Figure 12.16: Window - Filter Templates
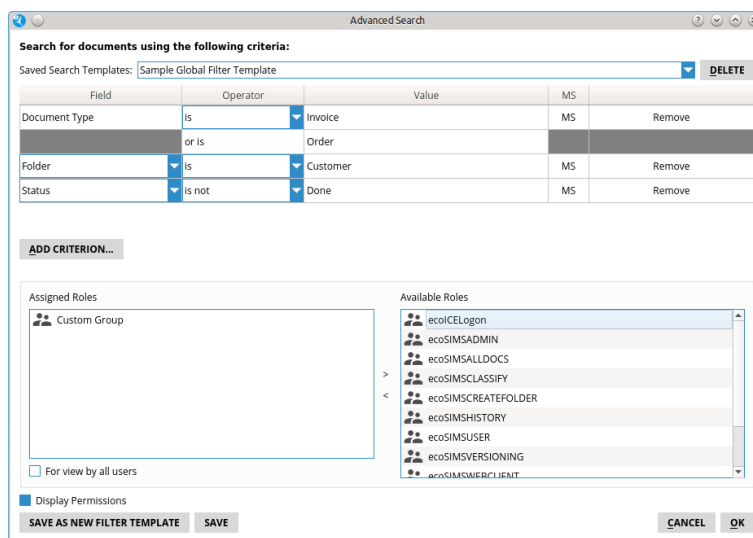
Figure 12.17: Advanced Search - Save Global Filters

12.7.3 Edit Filter Templates

Saved filter templates can be edited if necessary. For global filter this is only permitted for the administrator.

1. Open the window for the Advanced Search.

2. Select the matching search in the dropdown menu "Saved Filter Templates".

3. Make your changes.

4. Click "Save Search" to save the changes.

12.7.4 Delete Filter Templates

Saved filter templates can be deleted if necessary. For global filter this is only permitted for the administrator.

1. Open the Advanced Search dialogue box.

2. Select the matching search in the dropdown menu "Saved Filter Templates".

3. Click the button "Delete".

12.8 Search for Attributes

The simple search allows a search using individual classification attributes (meta data) [2].

1. Select the attribute you want to search for in the search area, for example, Document Type

2. Select the matching value in the search entry box.

3. The system displays all search results matching the search.
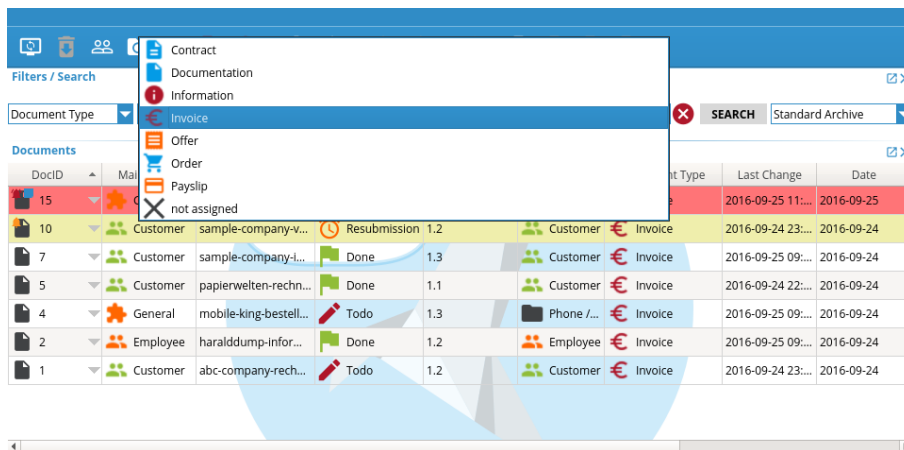
Figure 12.18: Search - Classification Attributes

12.9 Timeline

At the bottom of the ecoDMS Client, there is a timeline. Here, an arbitrary period can be set. Only documents with a date (value of the attribute "date") within this period are displayed in the table [2].

1. To activate the Timeline, place a checkmark in front of the "start date".

2. Use the arrow button in the date field on the left side to open the calendar and select the "start date".

3. After that use the arrow button in the date field on the right side to open the calendar and select the "end date".

4. The timeline will remain active until you remove the check mark before the start date again.

Figure 12.19: Timeline for Documents

12.9.1 Dynamic Date

You can dynamically switch the date in the timeline. In this case the date will daily be switched by the system, according to your settings. To do so, complete the following steps [2]:

1. Activate the Timeline according to the instructions in the previous section to display the calendar.

2. Activate Now, if required for your search, the command "Dynamic data".

3. Enter the dynamic values for the start and / or end date. The system starts out from the current date. The following values are available:

   a) Today +/-
   b) Days
   c) Months
   d) Years

12.9.1.1 Example: Dynamic Date

The dynamic data is automatically switched by the system. For example, if you daily want to view the documents from the last 7 days, complete the following steps:

1. Enter the values "TODAY - 7 days" as the start date in the left calendar of the timeline.

2. Enter the values "Today + 0 Day" as the end date in the right calendar of the timeline.

12.10 Status Filter

To display the content of a status, complete the following steps [2]:

1. Select the status in the Status window.

2. The status is highlighted by the system.

3. The table displays all documents, which are classified with this status.

This filter can be combined with other filters.

12.11 Folder Filter

To display the content of a folder, complete the following steps [2]:

1. Select the folder in the "Folder" window
   a) by double clicking on it in the Folder Structure **or**
   b) by simple entering the folder name, the key or keywords in the Folder Structure.
      i. In this case a box opens
      ii. The folder is highlighted by the system. Enter "F3" to continue.
      iii. Confirm the entry and selection with "Enter".

2. The folder is highlighted by the system.

3. The table displays all documents, which are available for this folder and its subfolders.

This filter can be combined with other filters.
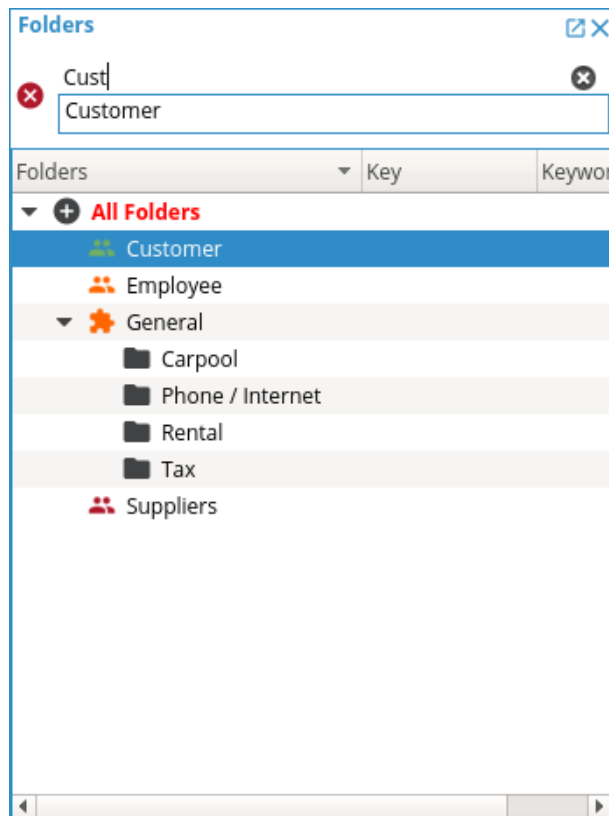
Figure 12.20: Window - Select Folder (Search)

12.11.1 All Folders

Per default, the table displays the contents of all folders. The results can also be limited to a specified folder. If you select a specific folder, the table only displays the documents that are archived in this folder and for which you have a permission [2].

- To return to the general view of all your documents, click "All Folders" in your folder structure.
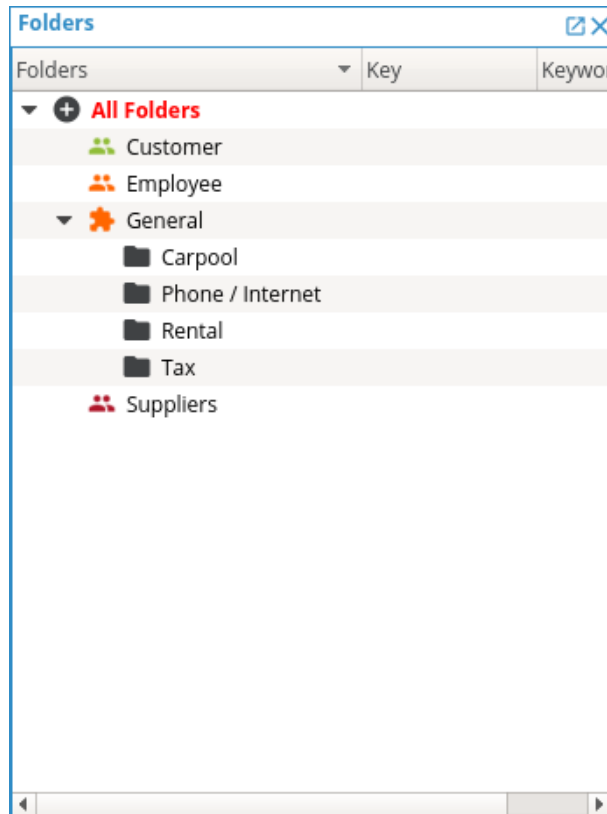
Figure 12.21: Window - Folders

12.12 Folder Search

The folder structure can contain several values. You can set keys and keywords optionally for any folder. If a folder is searched, the folder name, the key and the keywords can be used as search criteria. You have the following options [2]:

1. Click in the Folder Structure. To do this, you have the following options:
   a) in ecoDMS Client via the "Folder" window **or**
   b) in classification dialogue box using the attribute" folder" **or**
   c) in ecoDMS table using the attribute" folder"

2. Click anywhere in the ecoDMS table and enter the search term into the space. The search term may consist of letters and/or numbers.

3. A text entry box displays in the overview. The system automatically suggests search results when you enter the search term. This process searches and includes folder names and their keys, as well as keywords.

4. Continue Search with "F3".

Alternatively use the function "Search Folder". This function refers to the window "folder" in ecoDMS Client.

1. To start the function "Search Folder" you have the following options:
   a) Click the menu "View - Search Folder" **or**
   b) Click the toolbar icon "Search Folder" **or**
   c) Right click on any folder in the Folder Structure - "Search Folder" **or**
   d) Enter this shortcut: Ctrl + Alt +F

2. To continue the search, you have the following options:
   a) Click the menu "View - Continue Folder Search" **or**

b) Click the toolbar icon "Continue Folder Search" **or**

c) Right click on any folder in the Folder Structure - "Continue Folder Search" **or**

d) Enter this shortcut: F3

Figure 12.22: Icon - Search Folder and Continue Folder Search
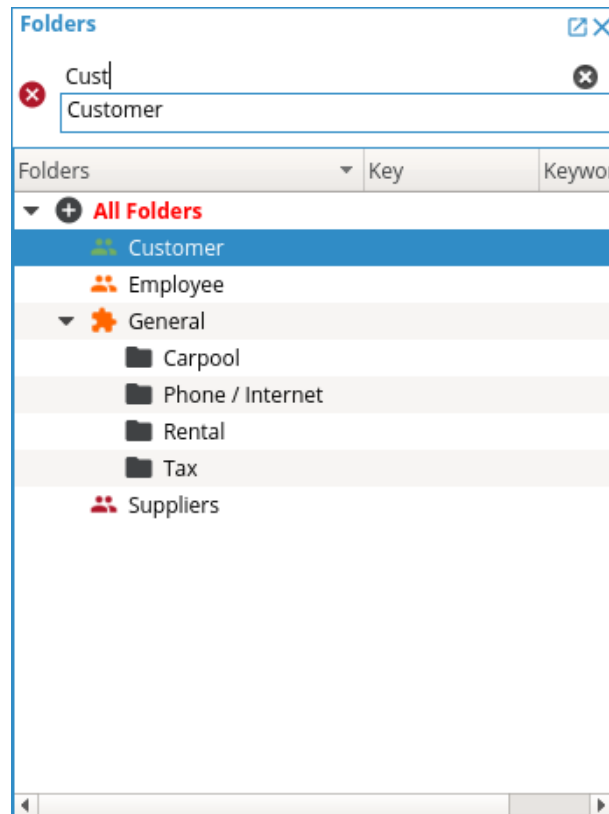
Figure 12.23: Window - Select Folder (Search)

12.13 Search Time Periods

To perform the search for documents within specific time periods, there are several options [2]:

1. Either you use the "Timeline" in ecoDMS Client and combine these with other criteria (see Chapter "Document Output in Table" **or**

2. Use the Advanced Search function of ecoDMS.

The following you can read an example of the "period search" using the Advanced Search:

1. Start the Advanced Search

2. Enter the values, for example, based on the following example:

Example: You want to display incoming invoices from the period 1 April 20XX to 30 April 20XX. The search operation is as follows:

– The document type is "Incoming invoices".

    – The date is greater than or equal to 1 April 20XX

    – The date is smaller than or equal to 30 April 20XX

Info: The date is automatically assigned when archiving, but it can be changed if necessary. We recommend you save the actual postal date of receipt of the document as date in ecoDMS. This simplifies the search and allows quick retrieval.

Important Information for Chapter 12

[1] *Please note that these settings refer to the individual workstation and are not stored in the user profile.*

[2] *The maximum number of documents displayed in the table depends on the settings in the "Search Results (Max)" area in the ecoDMS client (bottom right) and on the filter options.*

[3] *This feature requires a licence of the ecoDMS full version but can be tested during the time and is then automatically disabled until a full licence is activated.*

[4] *Viewing and using this function requires specific system permissions.*

13 Version Management

Version management allows the archiving of any number of document versions in ecoDMS. Each new version is archived as a new document with an incremented version number. The original files are stored in the version management. After the archiving process, the scanned PDF or TIFF files are automatically converted into the (readable) PDF/A format. The quality and size of the file determine the conversion time and the feasibility. After the successful conversion, the PDF/A can be opened. Until then the original file remains. You can open the PDF/A via the table. You can retrieve the original files via the version management function. Office files and emails are stored via the ecoDMS Plugins in the original format and as PDF / A.
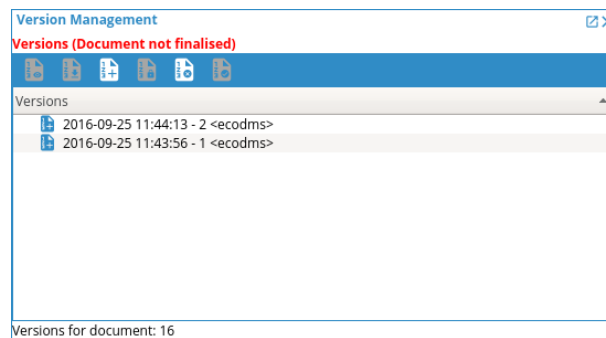
Figure 13.1: Window - Version Management

13.1 Create New Versioned Document

Usually new versioned documents are created via the Office Plugins or via the Standard Archiving in ecoDMS. Creating versioned documents is also possible via the Version Management. To create a new versioned document, you have the following options [1]:

1. Click the toolbar icon "Create New Versioned Document" **or**

2. Right-click the mouse anywhere in the ecoDMS table and then click "Create New Versioned Document..." **or**

3. Use this keyboard shortcut: Ctrl + D

4. Select the document in your filesystem and click "Open".

5. The selected document is archived as the first version, is displayed in the table and can be classified manually.

   a) You can always open the most recent version (e.g. PDF) of a file

   b) Use the "Version Management" function to access each version (usually the original file)

6. The first version is now stored in the "Version Management" window

   a) Double-click the entry to open the file

Figure 13.2: Icon - Create New Versioned Document
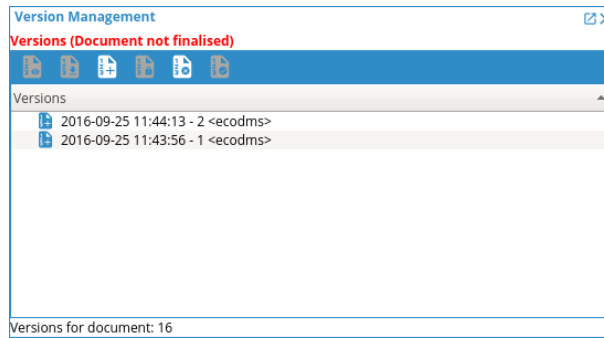
Figure 13.3: Window - Version Management

13.2 Add New Version to Document

As a rule, new versions are created via the Office plugins. You can also add new versions with the version management function [1].

- You cannot add new versions for finalised documents. The documents must be archived as versionable documents.

1. Select the already archived versioned document from the table. Use one of the following functions to add new version [1].
    a) Click on the toolbar icon "Add New Version to Document" **or**
    b) Right-click the mouse anywhere in the ecoDMS table and then click"Add New Version to Document" **or**
    c) Right-click the "Version Management" window and click "Add New Version to Document" **or**
    d) Click on the icon "Add New Version to Document" in the "Version Management" window **or**
    e) Select Version and then use this keyboard shortcut: Ctrl + G

2. You can archive a document from your file system in the window that opens

3. Select the document and click "Open"

4. The selected document is archived as the new version, is displayed in the table and can be classified
    a) You can always open the latest version (e.g. PDF) of a file from the table
    b) Use the "Version Management" function to access each version (usually the original file)

5. A new version is now stored in the "Version Management" window
    a) Double-click the entry to open the file

Figure 13.4: Icon - Add New Version to Document
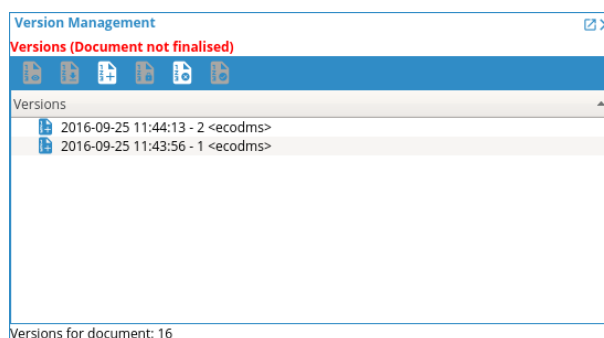
Figure 13.5: Window - Version Management

13.3 Open Versions

With access to the version management, a user has always access to each version. Therefor the status of the version is irrelevant. Only the archiving of additional versions can be locked when a document is locked by a user, for example, or if the file has already been completed (finalised). The opening of the versions is always possible when the user has access to the version management. However, the editing of documents after opening depends on its status and file format [1].

1. You can always open the most recent version (e.g. PDF) of a file

2. Use the "Version Management" function to access each version (usually the original file)

To open single versions, you have the following options:

1. Double click on version in the "Version Management" window **or**

2. Right-click the document in the "Version Management" window and click "Open Version" **or**

3. Click on the icon "Open Version" in the "Version Management" window **or**

4. Select Version and then use this keyboard shortcut: Ctrl + O

Figure 13.6: Icon - Open Version
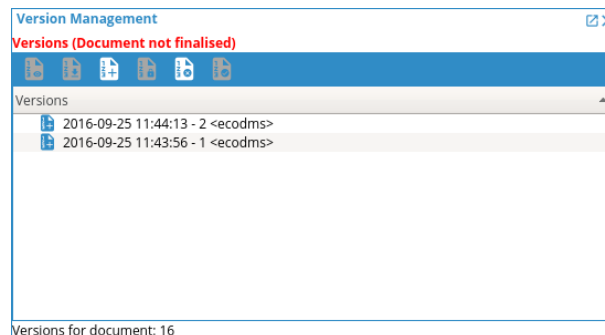
Figure 13.7: Window - Version Management

13.4 Finalise Version

Versions can be manually finalised by the user. Some documents such as scanned documents or files that were archived in ecoDMS as no versioned documents are automatically finalised after archiving. If a version / document is completed, no other versions can be added to this document. You cannot undo this status. There are various options to finalise version [1]:

1. Right-click the document in the "Version Management" window and click "Finalise Version" **or**

2. Click on the icon "Finalise Version" in the "Version Management" window **or**

3. Select Version and then use this keyboard shortcut: Ctrl + F

Figure 13.8: Icon - Finalise Version
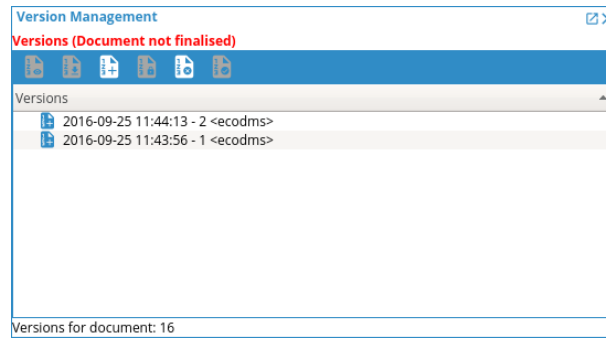
Figure 13.9: Window - Version Management

13.5 Lock Document (Check-Out)

The check-in and check-out process blocks a versioned document for other users while it is being edited. As long as a document is locked, other users have access to the versions, but no new versions can be saved at this time. To do so, complete the following steps [1]:

1. Select the document in the ecoDMS table

2. Go to the "Version Management" window

3. To lock the document, you have the following options:

   a) Right-click the document in the "Version Management" window and click "Lock Document" **or**

   b) Click on the icon "Lock Document" in the "Version Management" window **or**

   c) Right-click the document in the table and click "Lock Document" **or**

   d) Select Version and then use this keyboard shortcut: Ctrl + Alt + S

Figure 13.10: Icon - Lock Document

13.6 Unlock Document (Check-In)

The check-in and check-out process releases locked, versioned documents after a document was edited. As long as a document is locked, other users have access to the versions, but no new versions can be saved at this time. To unlock, complete the following steps:

1. Select the document in the ecoDMS table

2. Go to the "Version Management" window

3. To lock the document, you have the following options:

   a) Right-click the document in the "Version Management" window and click "Unlock Document" **or**

   b) Click on the icon "Unlock Document" in the "Version Management" window **or**

   c) Right-click the document in the table and click "Unlock Document" **or**

   d) Select Version and then use this keyboard shortcut: Ctrl + Alt + E

Figure 13.11: Icon - Unlock Document

Figure 13.12: Window - Version Management

Important Information for Chapter 13

[1]   *Viewing and using this function requires specific system permissions.*

14 Preview

The preview window displays a PDF document that is selected in the document table [3].

- ecoDMS can only preview PDF files.

- Depending on file size and volume it may take a while for the documents to display.

Figure 14.1: Window - Preview

14.1 Preview on / off

The loading of preview images can be turned on and off by any user.

1. Right click the preview window

2. Click "Quality of Preview".
   a) Disable the function by removing the check mark in "Preview line".
   b) Enable the function by setting the check mark in "Preview line".
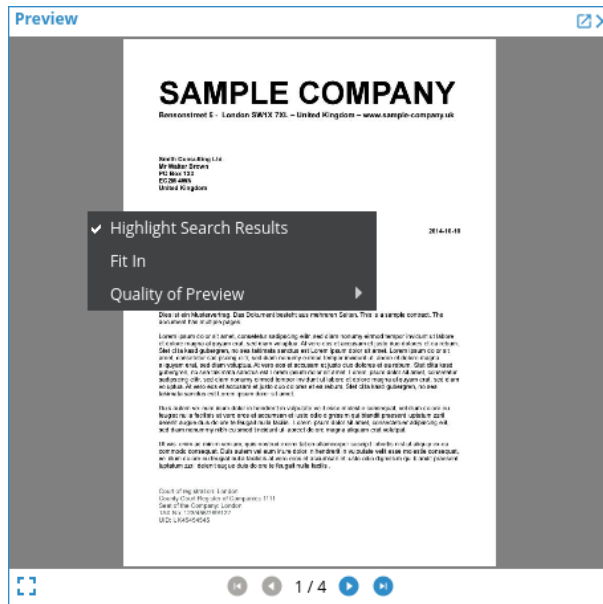
Figure 14.2: Preview on / off

14.2 Quality of the Preview Window

Every user can adjust the quality of the preview window. The quality of the document has an immediate impact on the ability of ecoDMS to recognise the document. The higher the quality, the better the recognition. Please note that the loading time of the preview window increases with increased quality.

1. Right-click the preview window

2. Select the preview quality:

    a) Low

    b) Normal

    c) High
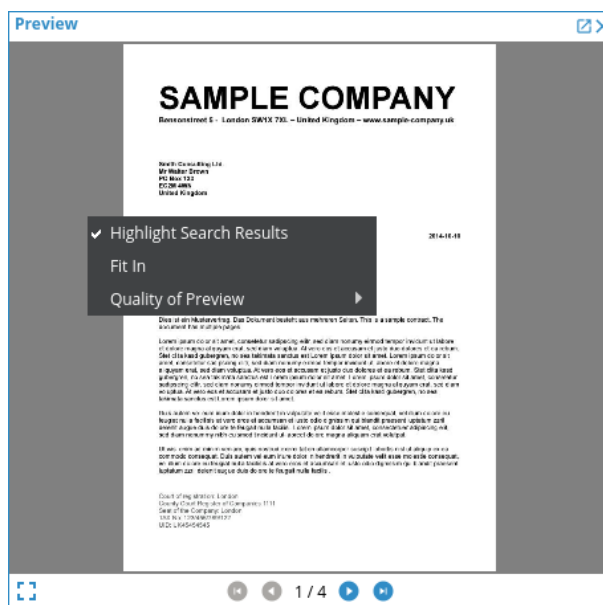
Figure 14.3: Quality of Preview

14.3 Zoom Preview

You can zoom the document in the preview window.

1. Scroll into or out of the document with the mouse.

2. Double-click on the preview image to re-fit image in the window.

14.4 Preview Full Screen

To view the displayed document in full screen mode, complete the following steps:

1. Click in the full screen icon in the preview window

2. ecoDMS displays the document in full screen mode.

    a) If a document has several pages, users can toggle from page to page.

Figure 14.4: Icon - Preview Full Screen

14.5 Highlight detected Search Terms

If a document preview exists for a retrieved file, the recognised words from the simple full-text search are highlighted in colour in the preview window. If a keyword occurs several times within a document, ecoDMS Archive also gives an overview of all occurrences of the keyword in the preview window. Click the required passages to open them [3, 1].

1. Right click the preview window

    a) Disable the function by removing the check mark in "Highlight Search Results".

    b) Enable the function by setting the check mark in "Highlight Search Results".

14.6 Classification preview

When archiving via the Office plugins or the PDF/A Printer and when generally saving PDF files, a preview is also displayed inside the classification dialogue box. From this preview window, you can use text passages and date fields for the classification [2, 3].

– For mass classification, there is no preview window in the classification dialogue box.
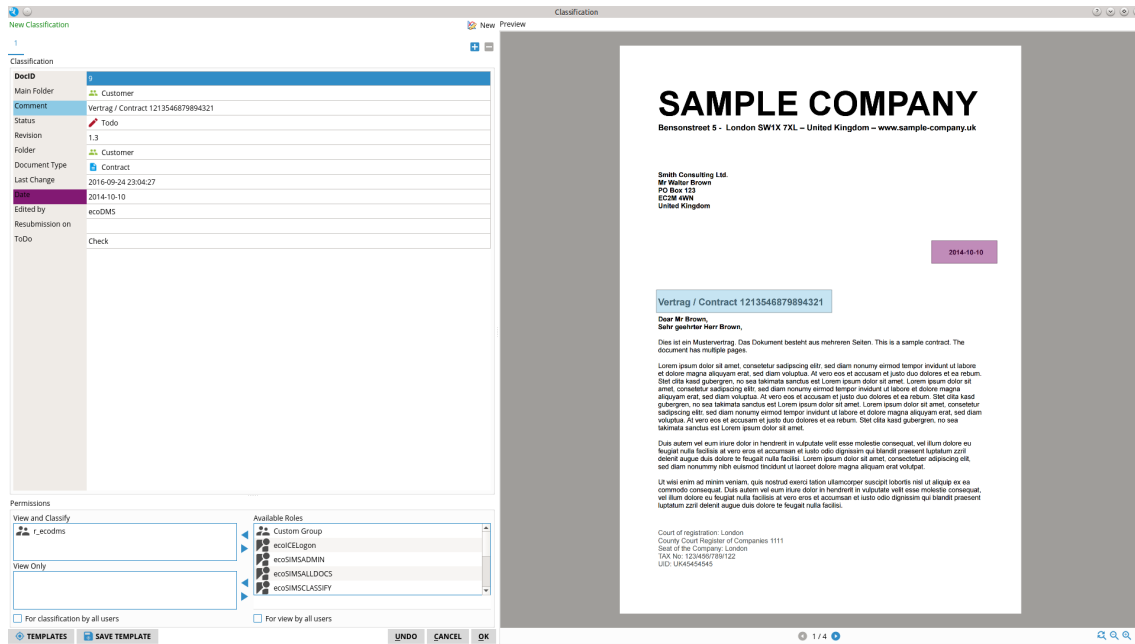
Figure 14.5: Classification Dialogue Box with Preview

Important Information for Chapter 14

[1] Please note that these settings refer to the individual workstation and are not stored in the user profile.

[2] The preview in the classification dialogue box is only displayed for PDF documents and files that are archived via the ecoDMS plug-ins or the PDF/A printer.

[3] This feature requires a licence of the ecoDMS full version but can be tested during the time and is then automatically disabled until a full licence is activated.

15 Clipboard

Any number of documents can be dragged onto a clipboard and collected in a kind of "portfolio" [1].
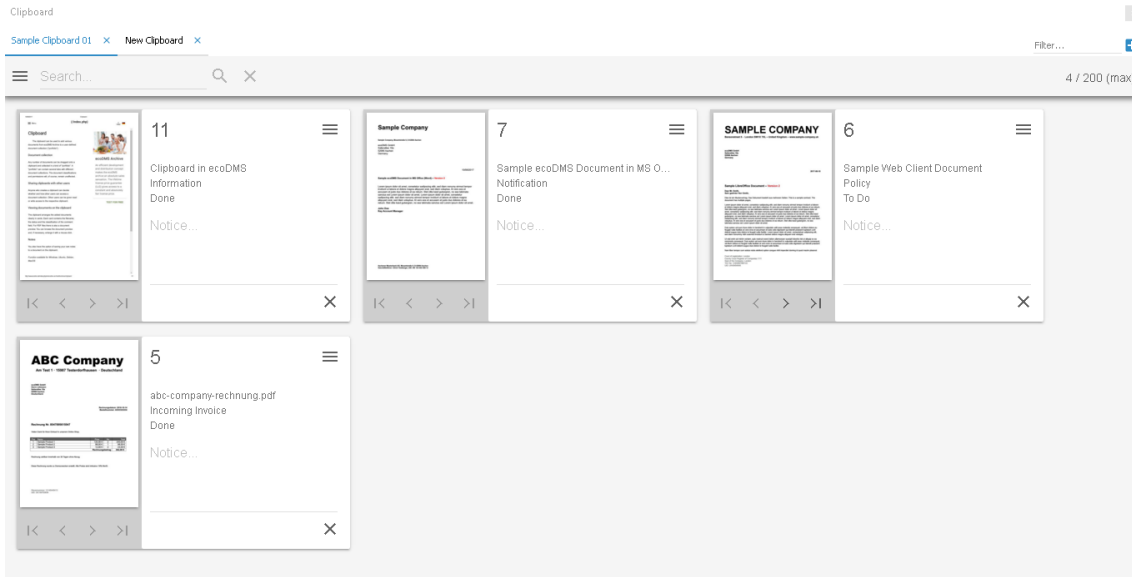
Figure 15.1: Clipboard - Overview
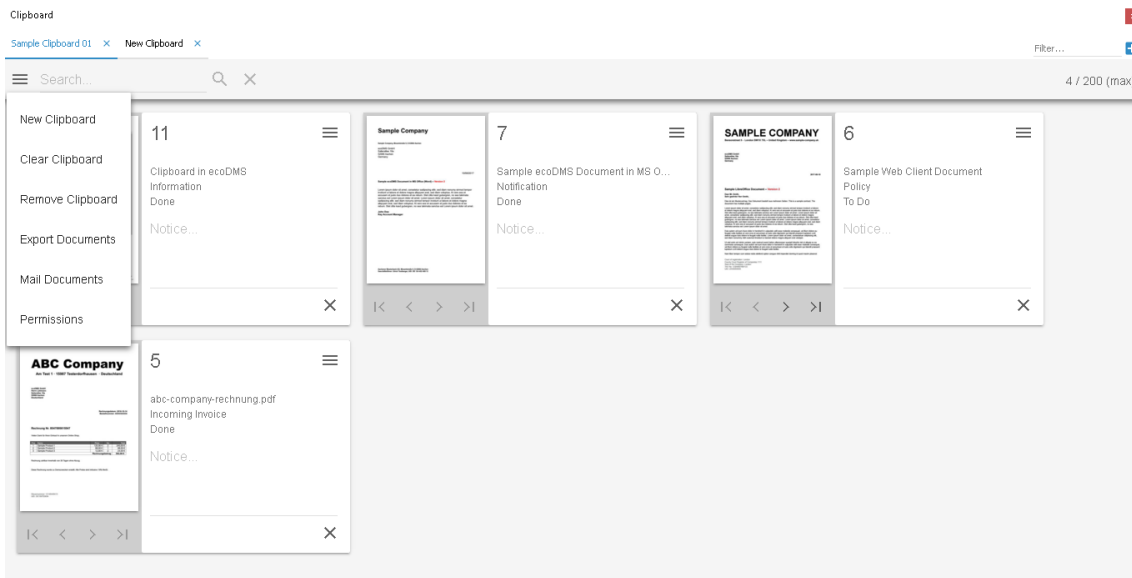
Figure 15.2: Clipboard - Functions in Clipboard Menu
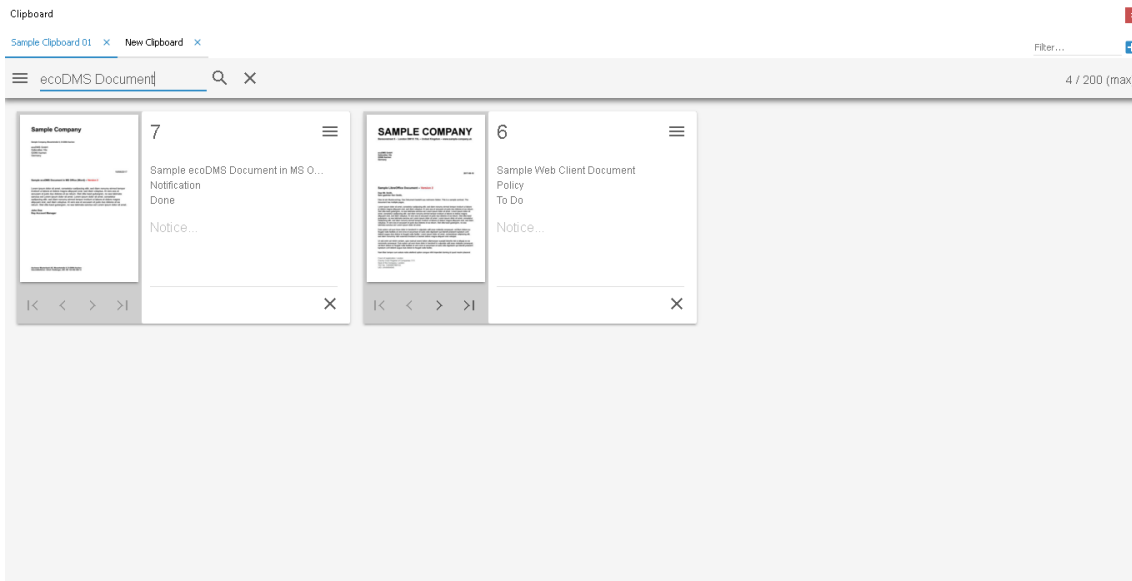
Figure 15.3: Clipboard - Document Search in Clipboard

15.1 Create Clipboard

ecoDMS has a default clipboard. You can add more clipboards in form of tabs. To do so, complete the following steps:

1. Open the clipboard menu in the upper left corner of the clipboard window.

2. Click "New Clipboard".

3. ecoDMS creates the new clipboard, which you can rename individually.

    a) Alternatively, you can create a new clipboard by using the "Plus" icon at the top right of the clipboard window.

15.2 Add Documents

You can add up to 200 documents to each clipboard. To drag one or more documents to a clipboard, complete the following steps:

1. Select the required documents in the ecoDMS table.

2. Drag & drop the documents onto the respective clipboard.

    a) This process does not move the documents within the archive. The DocID, classification and permission of a clipboard file are not changed.

3. The documents are loaded into the clipboard one after the other. This process may take a while depending on the number and size of the file(s).

15.3 Empty Clipboard

To empty a clipboard and remove all documents on the clipboard, complete the following steps:

1. Click the tab of the clipboard you want to delete.

2. Open the clipboard menu in the upper left corner of the clipboard window.

3. Click "Empty Clipboard".

4. All documents on the selected clipboard are removed. The clipboard is empty afterwards.

    a) The files are only removed from the clipboard, not from the archive.

15.4 Remove Clipboard

To fully remove a clipboard, complete the following steps:

1. Click the tab of the clipboard you want to remove.

2. Click the X icon next to the clipboard name to fully remove the clipboard.

    a) The files in the ecoDMS archive remain unaffected by the deletion of the clipboard.

Alternatively, you can, complete the following steps:

1. Click the tab of the clipboard you want to delete.

2. Open the clipboard menu in the upper left corner of the clipboard window.

3. Click "Remove Clipboard".

4. The clipboard is fully removed.

    a) The files in the ecoDMS archive remain unaffected by the deletion of the clipboard.

15.5 Export Documents

To export all documents on a clipboard tab, complete the following steps:

1. Click the tab of the clipboard you want to export from.

2. Open the clipboard menu in the upper left corner of the clipboard window.

3. Click "Export Documents".

4. Select the target folder for the export.

    a) If you enable the respective setting, you can also export the documents as a ZIP archive.

15.6 Send Documents

To send all documents on a clipboard tab via email, complete the following steps:

1. Click the tab of the clipboard from which you want to send the documents.

2. Open the clipboard menu in the upper left corner of the clipboard window.

3. Click "Send Documents".

4. The email entry window of your default email clients opens. The selected documents are added as email attachment.

15.7 Clipboard Permissions

Anyone who creates a clipboard can decide whether and how other users can access a document collection. Other users can be given read or write access to the respective clipboard. Above the clipboard permissions there are the configured document and folder permissions. To assign further permissions to a clipboard, complete the following steps:

1. Click the tab of the clipboard to which you want to assign further permissions.

2. Open the clipboard menu in the upper left corner of the clipboard window.

3. Click "Permissions".

4. Now assign the respective read and write permissions for the clipboard.

15.8 View & Open Document

The clipboard arranges the added documents clearly in cards. Each card contains the filename, the status and the classification of the comment field. For PDF files there is also a document preview. You can browse the document preview and, if necessary, enlarge it with a mouse-click.

15.8.1 Magnify Preview

If a preview is available for a document (available for PDF files), just click the preview. ecoDMS zooms in on the selected page to magnify it.

15.8.2 Open Document

Whether or not a preview is available, you can always open the file from the clipboard. To do so, complete the following steps:

1. Open the menu in the upper right corner of the document saved to the clipboard.

2. Now click "Display".

3. To open the file, ecoDMS uses the default application on your computer for the specified file type.

15.9 Remove Document from Clipboard

To remove individual documents from a clipboard, you have various options. Of course, the file is only removed from the clipboard, not from the archive.

15.9.1 Card Icon

1. On the clipboard, click the X icon in the bottom right corner of a document.

2. The document is removed from the clipboard.

15.9.2 Card Menu

1. Open the menu in the upper right corner of the document saved to the clipboard.

2. Click "Remove".

15.10 Display Document Classification

Each card contains the filename, the status and the classification of the comment field. To open the classification dialogue box, complete the following steps:

1. Open the menu in the upper right corner of the stored document in the clipboard.

2. Click "Show Classification".

3. ecoDMS opens the documents classification dialogue box.
    a) If you have the permission, you can change the settings in the dialogue box.
    b) Please note that changes to the classification will also have an effect outside the clipboard.
    c) This dialogue box is where you specify the classifications for all DocIDs in ecoDMS Archive.

15.11 Search Clipboard (Filter)

If you have created several clipboards (tabs), you can filter them by entering a tab name.

1. Enter the name of the tab you want to search for in the "Filter" search box.

   a) The search box is in the top right corner of the clipboard window.

2. Confirm your entry with "Enter".

3. ecoDMS displays the retrieved clipboard tabs.

   a) To exit the filter, just delete the entry.

15.12 Search Documents in Clipboard

You can search the documents on a clipboard (tab) with the full-text search. To do so, complete the following steps:

1. Enter the search term in the search box of the clipboard.

2. Confirm your entry with "Enter".

3. ecoDMS searches the documents on the clipboard and returns the matching search results on the clipboard.

   a) The system uses the extended full-text search. The full-text search searches for the full text and also searches the available classification information.

4. Click the "X" icon next to the search box to exit the search.

Important Information for Chapter 15

[1]   *This feature requires a licence of the ecoDMS full version but can be tested during the time and is then automatically disabled until a full licence is activated.*

16 Notes

Use the Notes window to append notes to a document. This function resembles the well-known adhesive notes.

- – All users who can view the document can edit, add to or delete notes.

- – If notes are available for a document, the file is labelled accordingly in ecoDMS.

- – The Advanced Full Text Search includes Classification Attributes and Notes in addition to the contents of documents.

- – If you want to search for document content and simultaneously for Classification Attributes and Notes, you must enable the Advanced Full-Text Search.
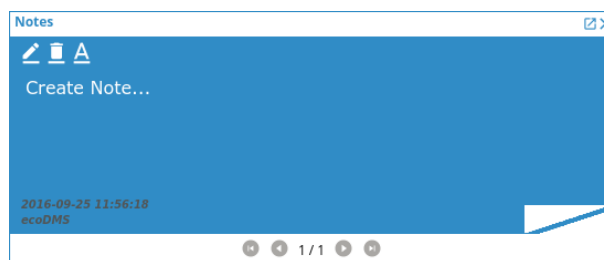
Figure 16.1: Window - Notes

16.1 Create Note

To create a note, complete the following steps:

1. Select the document in the table.

2. Select the function "Create Note". To do this, you have to following options:
   a) Right-click the document - "Create Note" **or**
   b) Click the "Create Note" icon in the toolbar **or**
   c) Enter this shortcut: Ctrl + N

3. You can create the note in the window "Notes".
   a) Any number of notes can be created for a document if you click on the icon "Create Notes" in the window "Notes".

Figure 16.2: Icon - Create Note

16.2 Format Note

The format of a note can be edited. It is then applied to the entire note.

1. Select the document in the ecoDMS table.

2. Select the note in the "Notes" window (use the arrow keys if there are several entries in the "Notes" window).

3. Click the icon "Format Note" in the "Notes" window.

4. Now select the font and the font size.

5. Click "OK" or to cancel the operation, click "Cancel"

Figure 16.3: Icon- Format Notes

16.3 Edit Note

1. Select the document in the ecoDMS table.

2. Select the note in the "Notes" window (use the arrow keys if there are several entries in the "Notes" window).

3. Then edit the text.

    a) The note is saved automatically.
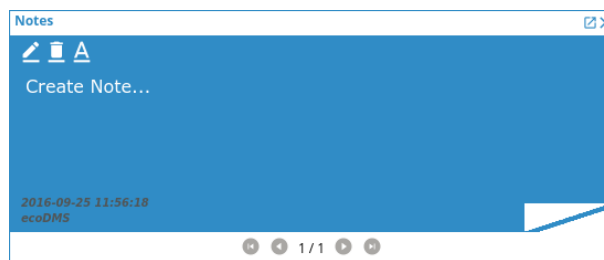
Figure 16.4: Window - Notes

16.4 Delete Note

1. Select the document in the ecoDMS table.

2. Select the note in the "Notes" window (use the arrow keys if there are several entries in the "Notes" window).

3. Click the icon "Delete Note" in the "Notes" window.

4. You have deleted the note.

Figure 16.5: Icon- Delete Note

16.5 Recognise Note

If a note is available for a document, a notes icon is added to the DocID in the ecoDMS table.

Figure 16.6: Icon - Note Information (DocID)

17 Side Panel

The side panel is placed on the right of the screen after you have enabled it in the Connection Manager. You can drag and drop files into the panel. Depending on the selection, ecoDMS Archive executes automatic pre-classification and archiving.
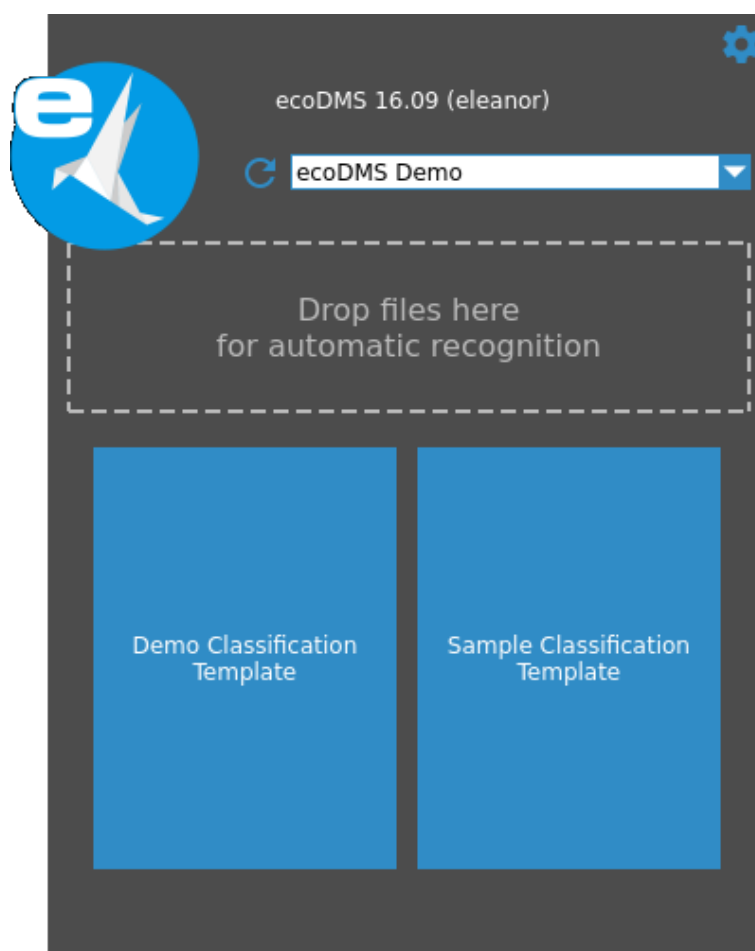
Figure 17.1: Side Panel

17.1 Archiving - Basics

- There are different ways of archiving documents in ecoDMS Archive (via ecoDMS client, side panel, drag & drop, addons, plugins, scanning...).

- When archiving, the files must be on a local hard disk.

- Network drives (share directories) are only supported during archiving if they are an immediate part of the system.

- Direct archiving is not possible from a simple shared directory.

- ecoDMS always stores archived files in the original format. Office documents or emails are only converted to PDF/A format when archiving with the respective ecoDMS plugin / addon. Moreover, ecoDMS converts TIFF, PNG, JPG and non-readable PDF files to a full-text searchable PDF file per default.

17.2 Enable / Disable Side Panel

Use the Connection Manager to activate the Side Panel in a workstation. Complete the following steps [1, 2]:

1. Open the Connection Manager at your workplace.

2. Enable the function "Show Side Panel".

3. The side panel is placed on the right of the screen after you have enabled it in the Connection Manager.
    a) You can hide or display it as required with a single click.
    b) To disable the side panel, deactivate the function.
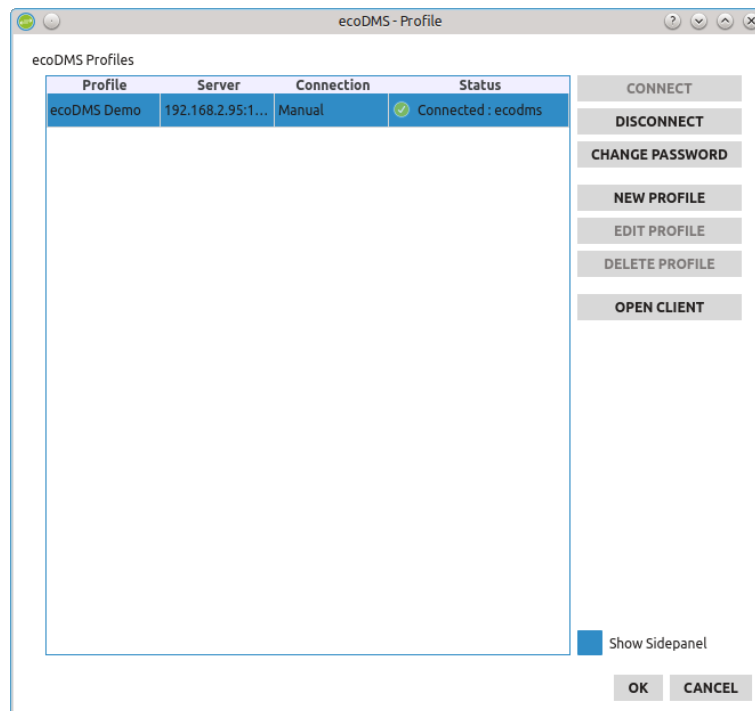
Figure 17.2: Side Panel - Activation via Connection Manager

17.3 Enable Classification Templates

By default, ecoDMS displays all available classification templates in the side panel. In the Settings dialogue box, you enable or disable the displayed templates in the side panel of your workstation. To do so, complete the following steps:

1. Extend the enabled side panel.
    a) To do so, just click the partially visible ecoDMS logo at the right edge of your screen.

2. Click the Settings icon (cogwheel) at the top right of the side panel.

3. Enable or disable the classification templates, as required.
    a) All enabled templates are displayed in the side panel.
    b) The other templates remain enabled, but are not available for selection in the side panel.

Figure 17.3: ecoDMS Logo (Only Partially Visible on the Edge of the Screen)

Figure 17.4: Settings Icon in the Side Panel (Cogwheel)

17.4 Specify Target Profile

Depending on the setting, you can configure and link several profiles in the connection manager. Before you finally archive a document, make sure the correct profile is selected for archiving.

1. To do this, select the profile in the respective list in the side panel.
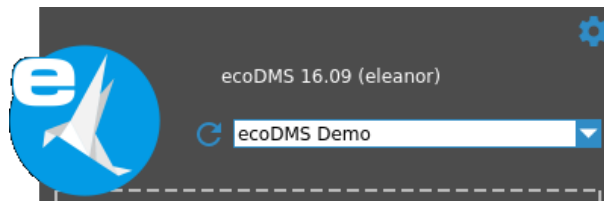
Figure 17.5: Side Panel - Select Target Profile

17.5 Automatic Archiving (Dark Process)

You can drag documents to a specific classification template in the Side Panel. The documents are then automatically archived without any need for action by the user. During classification ecoDMS fills in the recognised attributes according to the selected template.

1. Drag the document you want to archive onto the blue box of the required classification template in the side panel.

2. ecoDMS automatically classifies and archives the document in the background.

3. During the assignment process, all attributes that match the specifications in the classification template and/or can be assigned based on the template, are populated.

Figure 17.6: Side Panel - Automatic Archiving (Dark Process)

17.6 Automatic Pre-Classification (Classification Dialogue Box)

During archiving via the Side Panel, the matching classification template can also be determined by the system. Complete the following steps:

1. Drag the file you want to archive to the selected field for automatic pre-classification in the Side Panel.

2. Then the classification dialogue box opens.
   a) If one or more matching templates were found, the assignment of the recognised attributes will be carried out automatically.

3. Check the displayed classification.
   a) As an option you can make changes and/or remove the irrelevant tabs if one or more matching templates were found.

4. Complete the archiving process with "OK".
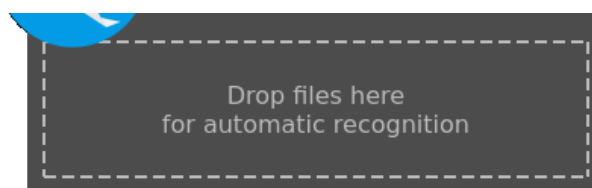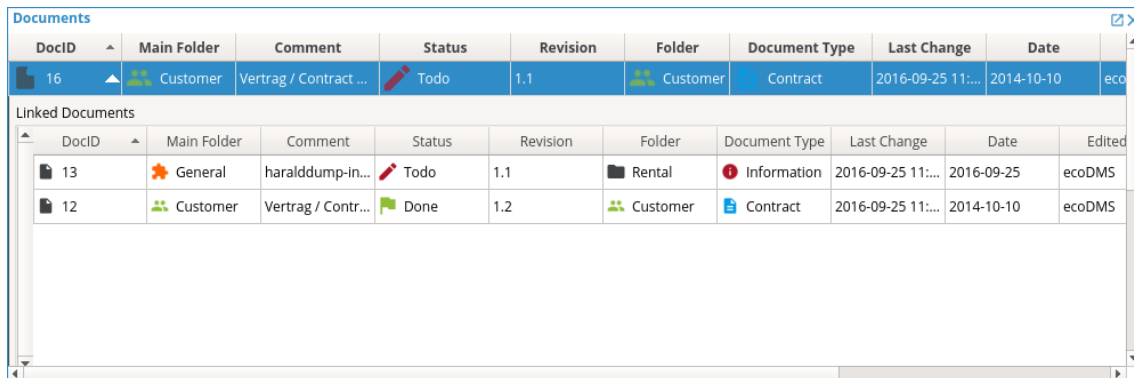
Figure 17.7: Side Panel - Automatic Classification Recognition

Important Information for Chapter 17

[1] *Please note that these settings refer to the individual workstation and are not stored in the user profile.*

[2] *This feature requires a licence of the ecoDMS full version but can be tested during the time and is then automatically disabled until a full licence is activated.*
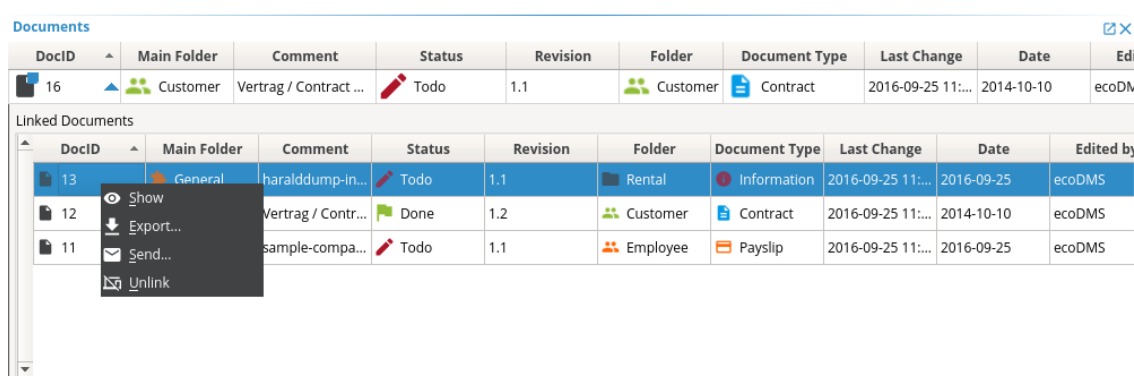
18 Linking

When linking documents, any archived files, including their classifications, can be added to a document and combined to form one process. The links are displayed in the ecoDMS Archive table as expandable sub-entries of the main document. The main entry of each linked document remains as it is. This function is similar to a virtual document clip. If necessary, the links can also be removed again [1].

Figure 18.1: Linking Overview

Figure 18.2: Linking - Right Click (Menu)

18.1 Create Link (Drag & Drop)

To create a link with drag & drop, complete the following steps:

1. In the ecoDMS table, select the document to which you want to add further documents in form of a link.

2. Extend the area for linked documents by clicking on the "Down" arrow in the "DocID" cell.

3. From the ecoDMS table or from the clipboard, drag & drop the documents you want to link into this area.

18.2 Create Link (DocID)

To create a link via DocID, complete the following steps:

1. In the ecoDMS table, select the document to which you want to add further documents in form of a link.

2. Right-click the document row.

3. Select the function "Link - With Other Document".

4. Now enter the DocID of the document you want to link.
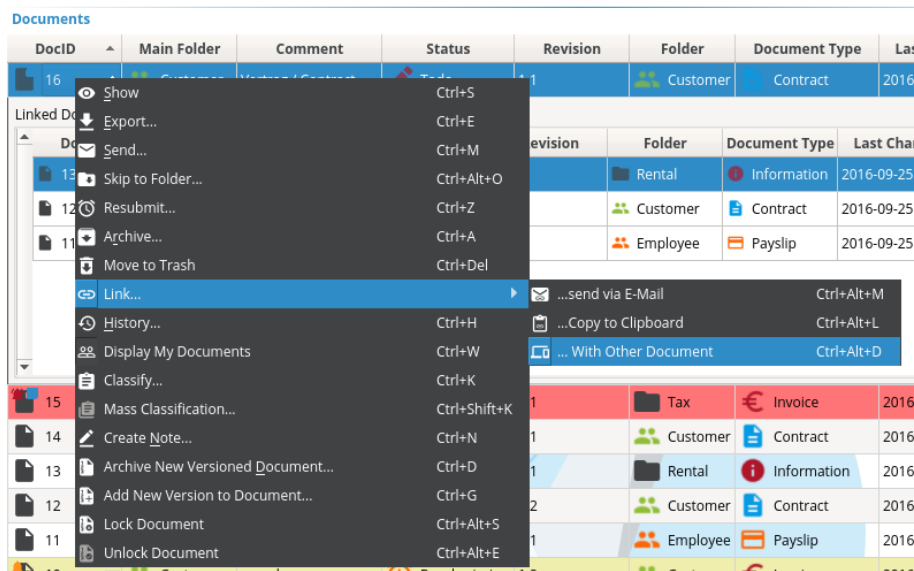
Figure 18.3: Link - With Other Document - Right-click (Menu)
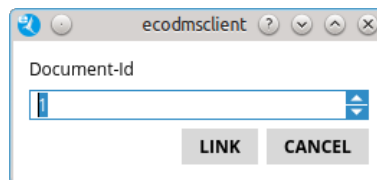
Figure 18.4: Link - With Other Document (DocID)

18.3 Undo Link

To undo the link of a document, complete the following steps:

1. Select the main document of the link in the ecoDMS table.

2. Extend the area for linked documents by clicking on the "Down" arrow in the "DocID" cell.

3. Right-click the document.

4. Click "Undo Link".

5. The document is removed from the linked documents. The file (DocID) and its classification remain unchanged in ecoDMS Archive.

18.4 Open Linked Document

To open a linked document, complete the following steps:

1. Select the main document of the link in the ecoDMS table.

2. Extend the area for linked documents by clicking on the "Down" arrow in the "DocID" cell.

3. Right-click the document.

4. Now click "Display".

5. ecoDMS opens the document.

   a) To open the file, ecoDMS uses the default application on your computer for the specified file type.

18.5 Export Linked Document

To export a linked document, complete the following steps:

1. Select the main document of the link in the ecoDMS table.

2. Extend the area for linked documents by clicking on the "Down" arrow in the "DocID" cell.

3. Right-click the document.

4. Now click "Export".

5. Select the target path for the export.

18.6 Send Linked Document

To send a linked document as an email attachment, complete the following steps:

1. Select the main document of the link in the ecoDMS table.

2. Extend the area for linked documents by clicking on the "Down" arrow in the "DocID" cell.

3. Right-click the document.

4. Now click "Send".

5. The email entry window of your default email client opens. The selected document is attached to the email.

Important Information for Chapter 18

[1] *This feature requires a licence of the ecoDMS full version but can be tested during the time and is then automatically disabled until a full licence is activated.*

19 History

ecoDMS records any change to the classification attributes of a document in a history. All processing and archiving steps are thus automatically logged and can be reproduced at any time. In addition, specific client-side user actions are logged. To ensure data protection, this function is only visible for users with the respective permission [1]:

1. Document archived

2. Document viewed

3. Document exported

4. Document sent via E-Mail

5. Document printed

6. Moved document to archive

7. New version created

8. Document finalised

9. Document deleted

10. Access via API

The history can be displayed as follows:

1. Select the document in the ecoDMS table.

2. Select now the "History" function. You have following options:
   a) Right-click one of the selected documents - History **or**
   b) Click the "History" icon in toolbar **or**
   c) Click "File - History" in menu bar **or**
   d) Enter this shortcut: CTRL + H

3. The history of the selected document is displayed.

Figure 19.1: Icon - History

Figure 19.2: History - Sample

Important Information for Chapter 19

[1] *Viewing and using this function requires specific system permissions.*

20 Delete Function

Documents can be moved to the trash. After a retention period in the system has expired, it is possible to irrevocably delete the respective documents from the archive. In this case the system creates a deletion log.

20.1 Trash

With the trash function, you can remove superfluous documents from the standard view (table). In this process the files are not deleted but stored in a virtual trash.

- The search and filter functions are also available in the trash.

- Classification is not possible in the trash.
    - To edit the classification, the document would need to be restored from the trash with the restore function.

20.1.1 Open Trash

At the bottom of the ecoDMS Client, there is a text entry box for search results in the right-hand corner. In this area, you can switch between the default view and the trash view.

1. Click the blue trash icon.

2. The trash opens.
   a) The trash is displayed in red. The trash view is enabled so that currently only the documents from the trash are visible.

Figure 20.1: Icon - Trash (Open / Close)

20.1.2 Exit Trash

At the bottom of the ecoDMS Client, there is a text entry box for search results in the right-hand corner. In this area, you can switch between the default view and the trash view.

1. Click the red trash icon.

2. The trash is closed.
   a) The trash is displayed in blue. The default view is enabled again.

Figure 20.2: Icon - Trash (Open / Close)

20.1.3 Move Document to Trash

To move one or several documents to the trash, you have different options. You must, however, have a permission to classify these files.

– If you move documents to the trash, they are still assigned to a folder. The classification is preserved. To delete the folder, you must first restore the documents and then classify them in another folder.

To do so, complete the following steps:

1. Select the document(s) in the ecoDMS table.

2. Select the function "Move to Trash". To do this, you have the following options:

   a) Right-click the document - "Move to Trash" **or**

   b) Click the "Move to Trash" icon in the toolbar **or**

   c) Enter this shortcut: Ctrl + Del

   d) Move the document(s) via Drag and Drop on the trash icon at the right bottom of the client.

Figure 20.3: Icon - Move to Trash

20.1.4 Restore

Documents in the trash can be restored. You must, however, have a permission to classify these files.

– For security selecting multiple entries is not possible in the trash.

1. Change to the trash view by clicking the trash icon at the bottom of the client.

   a) The icon shows that only documents from the trash are visible.

2. Select the document(s) in the ecoDMS table.

3. Select the function "Restore". To do this, you have the following options:

   a) Right-click the document - "Restore" **or**

   b) Click the "Restore" icon in the toolbar **or**

   c) Enter this shortcut: Ctrl + Ins

Figure 20.4: Icon - Move to Trash

20.2 Delete Documents Irrevocably

ecoDMS has a delete function that allows administrators to irrevocably delete selected documents from the ecoDMS archive (after the retention period has expired). These documents are then replaced in the trash by a deletion log. This makes the document history revision secure and verifiable at any time. Only users (administrators) with the assigned role ecoSIMSAdmin can access the deletion logs after the delete process (regardless of the original classification). These entries in the trash are not visible for other users. ecoDMS is revision secure. The definitive removal of the DocID from the trash is consequently not possible.

20.2.1 Display Deleted Documents / Documents For Deletion

In the trash, you can filter the entries according to their status [2, 1]:

- Only users (administrators) with the ecoSIMSAdmin role have access to this function. For all other users, this function is not visible.

- In the trash you cannot select several entries at the same time for safety reasons.

- Only users (administrators) with the assigned role of ecoSIMSAdmin can access the deletion logs after the delete process (regardless of the permission within the classification). For other users, these documents are no longer visible.

1. To gain an overview of the documents, for which no deletion log has been created yet and which have therefore not yet been deleted irrevocably, complete the following steps:
   a) Select the attribute Status in the ecoDMS search box.
   b) Click the option "For deletion".
      i. Please note that only the documents without retention period or those that have already expired can be deleted. Entries highlighted in light blue in the document table cannot or cannot yet be deleted irrevocably.

2. To gain an overview of the documents deleted irrevocably with deletion log, complete the following steps:
   a) Select the attribute Status in the ecoDMS search box.
   b) Click the option "Deleted".
      i. You can open and view the deletion log as usual with the "Display" function.

20.2.2 Delete Documents Irrevocably

- Please note that only the documents without retention period or those that have already expired can be deleted.

- Entries highlighted in light blue in the document table cannot or cannot yet be deleted irrevocably.

- In the trash you cannot select several entries at the same time for safety reasons.

- Only users (administrators) with the assigned role of ecoSIMSAdmin can access the deletion logs after the delete process (regardless of the permission within the classification). For other users, these documents are no longer visible.

To irrevocably delete a document from the archive and create a deletion log, complete the following steps in the trash [2, 1]:

1. To gain an overview of the documents, for which no deletion log has been created yet and which have therefore not yet been deleted irrevocably, complete the following steps:
   a) Select the attribute Status in the ecoDMS search box.
   b) Click the option "For deletion".
      i. Please note that only the documents without retention period or those that have already expired can be deleted. Entries highlighted in light blue in the document table cannot or cannot yet be deleted irrevocably.

2. Right-click the required document and select the "Delete" function.

3. A dialogue box displays "Delete Document Irrevocably".
   a) **PIN-CODE:** Enter the pin code.
   b) **Confirm PIN-CODE:** Enter the code highlighted in red.
   c) **Reason for deletion:** Enter a distinct reason for the delete process.
      i. This information is then displayed together with the delete date, the delete time and the user in a deletion log in place of the document.
   d) Confirm the delete process by pressing "OK" or abort the process by pressing "Cancel".
      i. The deleted file now receives the status "deleted".
      ii. Only users (administrators) with the assigned role ecoSIMSAdmin can access the deletion logs after the delete process (regardless of the original classification).

Figure 20.5: Icon - Right Click - Delete Document Irrevocably

Figure 20.6: Delete Document and Create Deletion Log

Löschprotokoll - Deletion Log

Das Dokument ist nicht mehr verfügbar. Die Datei wurde unwiderruflich aus dem ecoDMS Archiv entfernt. - This document is no longer available. The file has been irrevocably removed from the ecoDMS Archive.

Löschdatum - Deletion Date:	XXXXXX
Löschzeit - Deletion Time:	XXXXXX
Gelöscht von - Deleted by:	XXXXXX

Grund - Reason:

XXXXXX

Figure 20.7: Deletion Log - Sample

Important Information for Chapter 20

[1]   *This feature requires a licence of the ecoDMS full version but can be tested during the time and is then automatically disabled until a full licence is activated.*

[2]   *Viewing and using this function requires specific system permissions.*

21 Links: Document and Folder Links

The link function allows you to send and copy document and folder links. Use this function to open ecoDMS documents and folders from external programmes, for example.

- If you want a link to display as HTTP hyperlink, your administrator must adjust the necessary settings in the settings dialogue box. Otherwise links are always displayed as ecoDMS URL.

- A prerequisite for opening the link is access to the ecoDMS Archive or to the ecoDMS Server, and access rights for the document / the folder.

- To open or display links, the user must be connected via the Connection Manager.

21.1 Copy Document link to the Clipboard

To copy a document link to the Clipboard, complete the following steps [1]:

1. Select the document in the ecoDMS table.

2. Select the function "Link... Copy to Clipboard". To do this, you have the following options:
   a) Right-click the document - "Link... Copy to Clipboard" **or**
   b) Click the "Copy to Clipboard" icon in the toolbar **or**
   c) Enter this shortcut: Ctrl + Alt + L

3. You can paste the link to any position (for example in your Internet Browser or in other external applications).

4. When you click the link, the document opens.

Figure 21.1: Icon - Link... Copy to Clipboard

21.2 Send Document Link via E-Mail

To send a document link via E-Mail, complete the following steps [1]:

1. Select the document in the ecoDMS table.

2. Select the function "Link... Send via E-Mail". To do this, you have the following options:
   a) Right-click the document - "Link... Send via E-Mail" **or**
   b) Click the "Send via E-Mail" icon in the toolbar **or**
   c) Enter this shortcut: Ctrl + Alt + M

3. A mail window of your standard mail client opens. The selected documents are paste as text of the mail.

4. When you click the link, the document opens.

Figure 21.2: Icon - Link... Send via E-Mail

21.3 Copy Folder link to the Clipboard

To copy a folder link to the Clipboard, complete the following steps [1]:

1. Select the document in the ecoDMS table.

2. Right-click the document - "Link... Copy to Clipboard"

3. You can paste the link to any position (for example in your Internet Browser or in other external applications).

4. When you click the link, the ecoDMS Client opens.
    a) The copied folder is selected.
    b) The folder documents are displayed in the table.

Figure 21.3: Folder - Link...Copy to Clipboard

21.4 Send Folder Link via E-Mail

To copy a folder link to the Clipboard, complete the following steps [1]:

1. Select the document in the ecoDMS table.

2. Right-click the document - "Link... Copy to Clipboard"

3. A mail window of your standard mail client opens. The selected folder is paste as text of the mail.

4. When you click the link, the ecoDMS Client opens.
    a) The copied folder is selected.
    b) The folder documents are displayed in the table.

Figure 21.4: Folder - Link...send via E-Mail

Important Information for Chapter 21

[1] *If you want a link to display as HTTP hyperlink, your administrator must adjust the necessary settings in the settings dialogue box. Otherwise links are always displayed as ecoDMS url. To open or display links, the user needs access to the ecoDMS system and must be connected via the Connection Manager.*

22 Load Documents

The ecoDMS Archive continually receives new files and information. The files are archived for example from other users, from the Inbox (scanned documents) or from Addons. The ecoDMS tables displays all documents which are visible for the user.

22.1 Reload Documents

To view and update the documents and classifications, you have the followings options:

1. To do this, click the icon "Reload Documents" on the toolbar

2. When the client restarts, ecoDMS automatically retrieves and updates the documents and classifications.

Figure 22.1: Icon - Reload Documents

23 Open Documents

To show (to open) a document, complete the following steps.

1. Select the document in the ecoDMS table.

2. Load the function "Show". You have the following options:

    a) Click in menu "File - Show" **or**

    b) Right-click - "Show" **or**

    c) Click the toolbar icon "Show" **or**

    d) Enter this shortcut: Ctrl + S

Figure 23.1: Icon - Show

24 Send E-Mail

You can send archived documents from ecoDMS as an email attachment [1].

- Depending on the application, you cannot send attachments directly from ecoDMS. This is not an error in ecoDMS. Refer to https://bugs.launchpad.net/ubuntu/+source/xdg-utils/+bug/1019259 for more information on this topic for Ubuntu, for example. To avoid this issue, the administrator can store a syntax for all users in the Settings dialogue box to Open the email client (see chapter "Settings").

- The file name of the attachment can only be changed before sending in Windows clients.

1. Select documents in the ecoDMS table.

2. Select now the "Send" function. You have following options:
    a) Right-click one of the selected documents - Send **or**
    b) Click the "Send" icon in toolbar **or**
    c) Click "File - Send" in menu bar **or**
    d) Enter this shortcut: CTRL + M

3. In Windows, a window now opens to change the file name.
    a) Overwrite the file name if necessary.
    b) You cannot change the file type. This is automatically appended by the system.
    c) Confirm your entry with "OK" or cancel the process with "Cancel".

4. A mail window of your default mail client opens. The selected documents are added as attachment of the email.

Figure 24.1: Icon - Send

Important Information for Chapter 24

[1] *When exporting and sending e-mails from ecoDMS, the comment (attribute) is transferred as filename to the documents. Numbers and letters are transferred.*

25 Resubmission

The archiving system has an integrated reminder function for archived documents. Very often tasks are not so urgent or must/can only be finished on a certain day. To ensure that the documents are edited at the right time and are not forgotten, ecoDMS offers a resubmission function. If this function is selected, the resubmission date can be specified in a date window. When the ecoDMS client launches, current resubmissions are displayed if configured in the settings. In this case a pop-up window opens and displays the number of documents for resubmission for the period specified in the settings dialogue box [2, 1].

25.1 Resubmission Steps

ecoDMS reminds you shortly ahead of time about the document by displaying an icon at the DocID and by highlighting the table entry in colour. Moreover, the document is automatically linked into the "ToDo" status. The users then know that this file can/should be processed. The following steps are available [2, 1]:

Icon and Color	Days to Processing
none	>7
	<=7
	<=3
	<1 (in addition, the document displayed in the "ToDo")

25.2 Configure Resubmission

You configure the resubmission in form of a classification. To do this, you have various options:

25.2.1 Resubmission Function

You can select the Resubmission function directly [2, 1]:

1. Select the document in the ecoDMS table.

2. To select Resubmission, you have various options:
   a) In the menu click "File - Resubmit..." **or**
   b) Click the icon "Resubmit..." on the toolbar **or**
   c) Right-click the mouse on the document in the table - "Resubmit..." **or**
   d) Enter the shortcut: CTRL + Z.

3. The "Resubmit Document On..." dialogue box opens.

4. Select the date in the calendar.
   a) Use the arrow keys (left, right) to switch between the months.
   b) You can change the month and the year using the navigation in the calendar header.
   c) Click "Today" to set the current day.
   d) You can also enter the date directly. The first number is entered in the calendar.

5. Confirm your entry and selection with "OK".
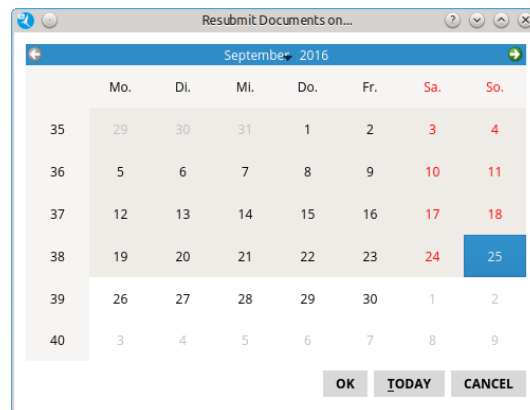
Figure 25.1: Calendar - Select Date

25.2.2 Classification Dialogue Box (Included in all ecoDMS Components)

Via the classification dialogue box, you can also set the Resubmission Status [2, 1]:

1. Open the classification dialogue box for the document(s).

2. Select the entry field for the Status attribute.
    a) Either by double-clicking **or**
    b) By entering the letter "e" (edit).

3. Select the Status.
    a) If you select Resubmission, the calendar opens to enter the resubmission date.

4. Select the date in the calendar.
    a) Use the arrow keys (left, right) to switch between the months.
    b) You can change the month and the year using the navigation in the calendar header.
    c) Click "Today" to set the current day.
    d) You can also enter the date directly. The first number is entered in the calendar.

5. Confirm your entry and selection with "OK".
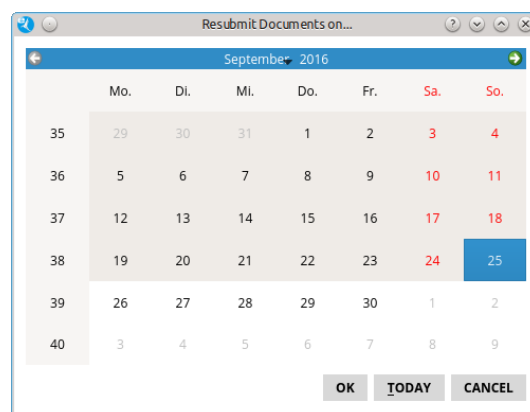
Figure 25.2: Calendar - Select Date

25.2.3 Table in ecoDMS

The status can be set via the ecoDMS Table [2, 1]:

1. Select the document in the ecoDMS table.

2. Select the entry field for the Status attribute.

   a) Either by double-clicking or

   b) By entering the letter "e" (edit).

3. Select the Status.

   a) If you select Resubmission, the calendar opens to enter the resubmission date.

   b) Select the date in the calendar.

      i. Use the arrow keys (left, right) to switch between the months.

      ii. You can change the month and the year using the navigation in the calendar header.

      iii. Click "Today" to set the current day.

      iv. You can also enter the date directly. The first number is entered in the calendar.

4. Confirm your entry and selection with "OK".
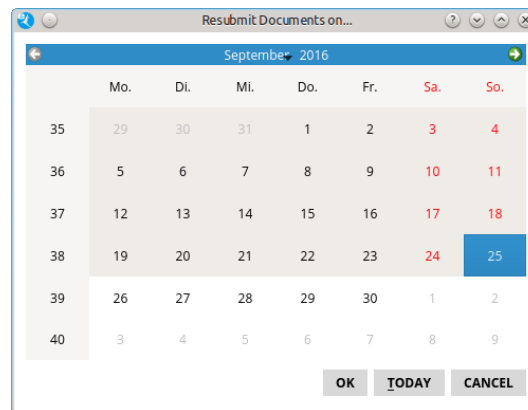
Figure 25.3: Calendar - Select Date

25.2.4 Drag & Drop Classification in ecoDMS

Via drag and drop documents can be pushed to the status Resubmission [2, 1]:

1. Select the document(s) in the ecoDMS table.

2. Grab the document(s) "at the DocID".

3. Drag the document(s) to the required Status in the ecoDMS Status window.

   a) If you select Resubmission, the calendar opens to enter the resubmission date.

   b) Select the date in the calendar.

      i. Use the arrow keys (left, right) to switch between the months.

      ii. You can change the month and the year using the navigation in the calendar header.

      iii. Click "Today" to set the current day.

      iv. You can also enter the date directly. The first number is entered in the calendar.

4. Confirm your entry and selection with "OK".
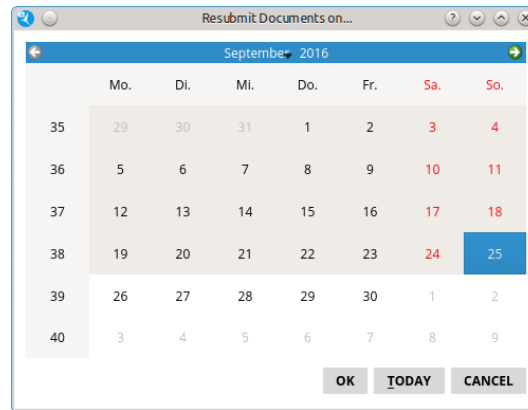
Figure 25.4: Calendar - Select Date

25.3 Display Resubmissions

When you start the client, you can display pending resubmissions in a dialogue box. The administrator can enable this dialogue box for all users in the Settings dialogue box. To display resubmissions, complete the following steps:

1. Start the ecoDMS Client.

2. If there are resubmissions, a dialogue box displays the number of relevant documents.

3. Click "Display" to show the documents or cancel the operation with "Cancel".

   a) To close the filter and return to the normal view, click the icon "Reset All Active Filters".

Figure 25.5: Icon - Reset All Active Filters

Important Information for Chapter 25

[1]   *A document may only be classified if the user has a permission to classify the specified document.*

[2]   *Viewing and using this function requires specific system permissions.*

26 Highlight Unread Documents

Documents that have not yet been opened by a user ("Show" function) can be highlighted by the system. These documents are identified in the table in bold font. This function can be enabled or disabled at each workstation [1].

1. At the bottom right of the ecoDMS Client, there is an entry called "Highlight Unread Documents".

2. If you enable the checkbox, unread documents are highlighted until they are opened for the first time ("Show" function).
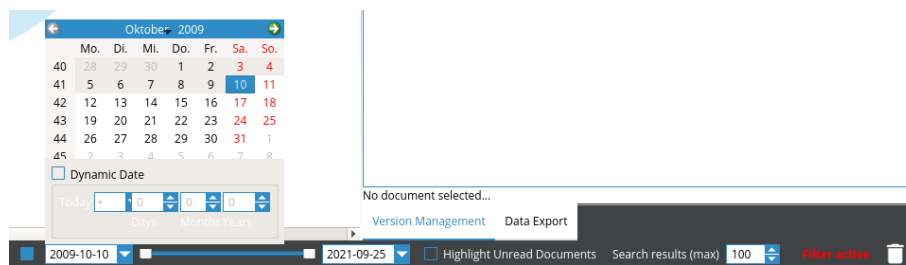
Figure 26.1: Highlight Unread Documents (right of timeline)

Important Information for Chapter 26

[1]   *Please note that these settings refer to the individual workstation and are not stored in the user profile.*

27 Print from ecoDMS

The ecoDMS Client has a printing function. This function enables you to print selected documents directly from ecoDMS.

- The documents need to be printable files.

- The respective computers must contain the necessary programmes for opening the specific files.

- This function is only available in the ecoDMS Windows Client.

1. Select the documents in the ecoDMS table

2. To select the "Print" function:
   a) Right-click one of the selected documents in the table **or**
   b) click the printer icon on the toolbar

3. To start the printing process, ecoDMS opens the documents one after the other and also closes them again automatically.

Figure 27.1: Icon - Print

28 Folder Functions

There are various functions and commands for the folders created in ecoDMS.

28.1 Skip to Folder

1. Select the document in the ecoDMS table.

2. Right-click the mouse and select "Skip to Folder".

3. The corresponding folder is selected in the "Folder" area. The documents in the folder that are visible to the user are displayed in the table.

Figure 28.1: Icon - Skip to Folder

28.2 Expand / Collapse Folders

Right-click on a folder in the folder structure you can expand and collapse the folders.

28.2.1 Expand Folders

To expand a single folder in the folder structure, complete the following steps:

1. Right-click on a folder in the folder structure.

2. Click "Expand Folder".

Figure 28.2: Icon- Expand Folder

28.2.2 Collapse Folder

To collapse a single folder again, so that the proper subfolders are not visible at first sight, complete the following steps:

1. Right-click on a folder in the folder structure.

2. Click "Collapse Folder".

Figure 28.3: Icon- Collapse Folder

28.2.3 Expand All Folders

You can show all the subfolders within the folder structure so that they are visible. To do this, complete the following steps:

1. Right-click on a folder in the folder structure.

2. Click "Expand All Folders".

Figure 28.4: Icon- Expand All Folders

28.2.4 Collapse All Folders

You can collapse all subfolders within the folder structure again, so that they are not visible at first sight. To do this, complete the following steps:

1. Right-click on a folder in the folder structure.

2. Click "Collapse All Folders".

Figure 28.5: Icon- Collapse All Folders

28.3 Create Folder (Without Settings Dialogue Box)

You can also create folders directly through the classification dialogue box or the folder structure if you have the according permission. Complete the following steps [3, 1]:

1. Right-click the location in the folder structure where you want to create a new folder.
    a) To create a new main folder, click "All Folders".
    b) To create a subfolder, click the respective main folder.

2. Then click the "Create New Folder" function.

3. A dialogue box opens. Enter the following information:
    a) **Name:** Enter a folder name.
    b) **Key:** As an option, you can assign a folder key. It is an alpha-numeric field. Examples for keys are folder number, customer number or something similar.
    c) **Keywords:** As an option, you can assign keywords. It is an alpha-numeric field. Keywords can have different meanings in the system:
        i. By using keywords, you can find and assign folders more quickly. Possible keywords are, for example, address details, project information, a VAT-ID or the like. When searching for folders, you can also use keywords.
        ii. Keywords also serve as an extension of the automatic assignment (pre-classification) of folders. If a document is scanned and archived with the PDF/A Printer or via an Office Plugin, and no template is recognised, the document can still be assigned to the respective folder via the keywords.

4. Confirm your entry with "OK" or cancel the operation with "Cancel".
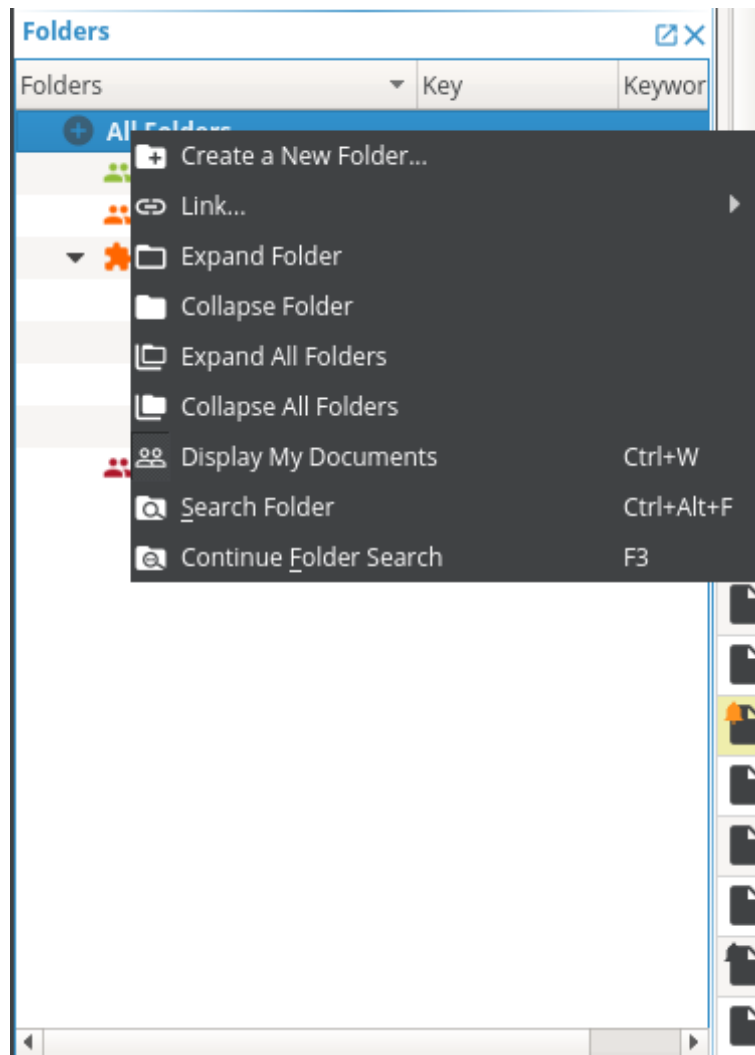
Figure 28.6: Folder Structure - Create New Folder (Right Click)
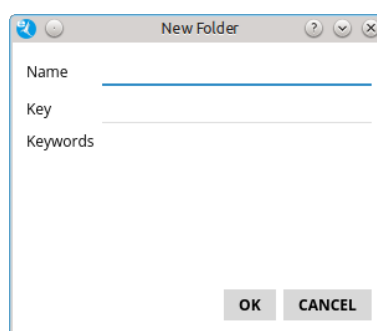
Figure 28.7: Folder Structure - Create New Folder

28.4 Order of the Folder Structure

You can change the order of the folders [2]:

1. In the folder structure, click the column header of the column you want to sort
   a) The arrow displays the sort direction (ascending or descending)

28.5 Hide Column(s)

The folder structure contains various columns:

1. Folders

2. Key

3. Keywords

Unused columns can be hidden in the client if necessary. To do this, complete the following steps [2]:

1. Right-click the header line in the "Folder" window (column names).

2. Select "Show/Hide Column(s)".

3. Disable the columns by removing the checkmark (tick).

28.6 Show Column(s)

The folder structure contains various columns:

1. Folders

2. Key

3. Keywords

If columns are hidden, you can display them again as follows [2]:

1. Right-click the header line in the "Folder" window (column names).

2. Select "Show/Hide Column(s)".

3. Enable the required columns by setting the mark (tick).

Important Information for Chapter 28

[1] *Changes within the settings dialog and folder structure of ecoDMS are always valid for all users. The user must restart the client or click the icon "refresh desktop" to see the changes.*

[2] *Please note that these settings refer to the individual workstation and are not stored in the user profile.*

[3] *Viewing and using this function requires specific system permissions.*

29 Visible Documents

In the ecoDMS Client you can set the type of document to be displayed. You can select personal and all documents. In addition, you can set the maximum number of search results you want to display.

29.1 Display All Documents

If the function "Display All Documents" on the toolbar is enabled, all documents, for which the user has permission, are displayed. Click the icon to change the display. This configuration is recommended as default setting.

Figure 29.1: Display All Documents

29.2 Display My Documents

If the function "Display My Documents" on the toolbar is enabled, only your personal documents are displayed. For this, a permission needs to be assigned to your user name in the classification (not to you as part of a group). Click the icon to change the display.

Figure 29.2: Display My Documents

29.3 Number of Search Results

At the bottom of the ecoDMS Client, there is a text entry box for search results in the right-hand corner. In this area you can determine the maximum number of search results displayed in the table.

  – Default: 100 results

  – Minimum: 1 result

  – Maximum: 1000 results
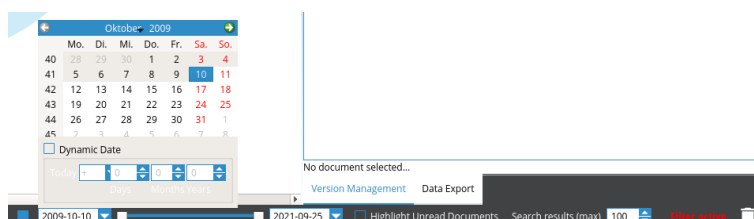
Figure 29.3: Search Results (max.) -> Right to Timeline

30 Archive

Documents can be stored in different archives. However, this is not recommended. To draw the best possible benefit from the advantages the software offers, we recommend you store all data in an archive (Keyword: Filter functions) [2, 4].

30.1 Select Archive

You can select the archive you need. The default selection is "Default Archive" [2, 4].

30.2 Move File(s) to Archive

We recommend you to store all documents in one archive. If you have created several archives you can move file(s) to another archive when needed via the ecoDMS Client. [3, 1, 2, 4].

1. Select the document(s) in the ecoDMS table.

2. Select "File - Move to Archive" from the menu.

3. Here you select the target archive.

    a) ecoDMS moves the selected documents.

Figure 30.1: Icon - Move to Archive

Important Information for Chapter 30

[1] *A document may only be classified if the user has a permission to classify the specified document.*

[2] *An archive is only used to separate documents within a server and is not an independent server. Because of that you cannot assign user-defined settings, structures, users, groups and/or permissions to archives.*

[3] *Viewing and using this function requires specific system permissions.*

[4] *We recommend you store all documents in an archive. For this, the default archive is recommended. This simplifies the search and filing processes immensely. When archiving and searching for documents, you always use the current archive. If multiple archives are created, files can be moved to another archive if necessary.*

31 Export & Offline Client

You can export archived documents to any destination. The documents and information are of course not removed from the archive. For export ecoDMS offers various functions:

31.1 Export (simple)

Documents can be exported directly from the table in ecoDMS [3]:

1. Select documents in the ecoDMS table.

2. Select now the "Export" function. You have following options:
   a) Right-click one of the selected documents - Export **or**
   b) Click the "Export" icon in toolbar **or**
   c) Click "File - Export" in menu bar **or**
   d) Enter this shortcut: CTRL + E

3. A new window opens. Select the destination path for exporting.
   a) Enable the checkbox "Export as Zip-archive" in the dialogue box if you want to export data as ZIP-archive.
   b) Now name the Zip-archive.

4. Confirm your entry by clicking the "Open" button.
   a) Depending on the data volume the export may take some time.

Figure 31.1: Icon - Export

31.2 Export via Drag and Drop

If you want to export documents, you can drag the documents from ecoDMS into the file system with the mouse (but you cannot move them!) [3].
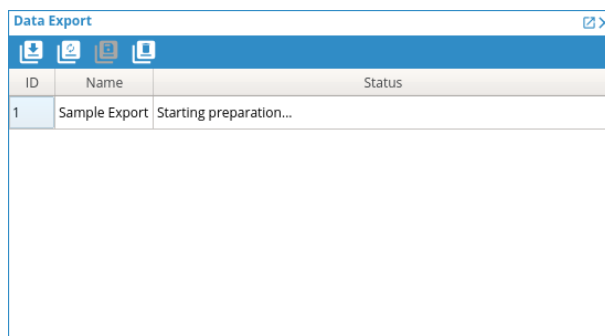
1. Click and press the left mouse button to select the documents in the table

2. Drag your selection to a location in your file system (e.g. on the desktop).

31.3 Data Export (advanced)

Documents and their classification attributes can be exported with the data export function from the ecoDMS Archive and can be saved to any data carrier. This export function exports all documents, versions and information. Afterwards the documents can be retrieved and displayed with the standard offline reader via the conventional ecoDMS search functions. The exported files are saved as ZIP files.

- **Only users (administrators) with the ecoSIMSAdmin role / permission have access to this function. For all other users this function is not visible.**

– **When exporting data, all documents, irrespective of their permissions, can be exported by the administrator.**

Figure 31.2: Window - Data Export

31.3.1 Export Data

The time required for export always depends on the technical system environment and the data volume. A complete and clean export process always needs some time. To export data, complete the following steps [2, 1]:

1. Select the window in your ecoDMS Client.

2. Click the "Create New Export" icon.

3. Enter the "export criteria". This operation is the same as the Advanced Search (c.f. ecoDMS manual). Here, too, your "filter templates" are available as "export settings".

4. Assign a name to the "export" and click "OK" to continue.

5. The information you entered are now displayed in the Data Export area. It may take some time for ecoDMS to read in the files and prepare them for "export". The wait time depends on the data volume.

    a) You can retrieve the current status manually during the preparation. To do so, click the icon "Refresh Export Status". These are the following statuses:

        i. Starting preparation...

        ii. Preparing database...

        iii. Preparing files...

        iv. Preparation completed.

        v. Packing data...

        vi. Clean up...

        vii. Ready to download.

    b) You can start the export when the status is "Ready to download.".

6. Click the icon "Start Downloading Export".

7. A dialogue box opens. Select the destination path and confirm your selection.

8. The export is executed.

Figure 31.3: Icon - Create New Export

Figure 31.4: Icon - Refresh Export Status

Figure 31.5: Icon - Start Downloading Export

31.3.2 Remove Export from List

To delete a request for data export from the list, complete the following steps [2, 1]:

1. Select the Data Export window in your ecoDMS Client.

2. Click the icon "Delete Export from List".

3. Confirm the confirmation prompt with "Yes".

4. You have now deleted the "Export" request.

Figure 31.6: Icon - Delete Export from List

31.3.3 Access Exported Documents

After the Data Export ecoDMS deposits a "ZIP file" in the selected destination folder.

1. Unpack the zip file.

2. Click through the folders until you find the "Archives" folder.
   a) This is where all exported documents / files and versions (if available) are archived.

31.3.4 Access XML Information

The Data Export also creates a XML file named "export.xml". The file includes all available classification and version information to the exported documents.

1. Unpack the zip file.

2. Click through the folders until you find the "Archives" folder.
   a) Here you will find the XML-file including all information.
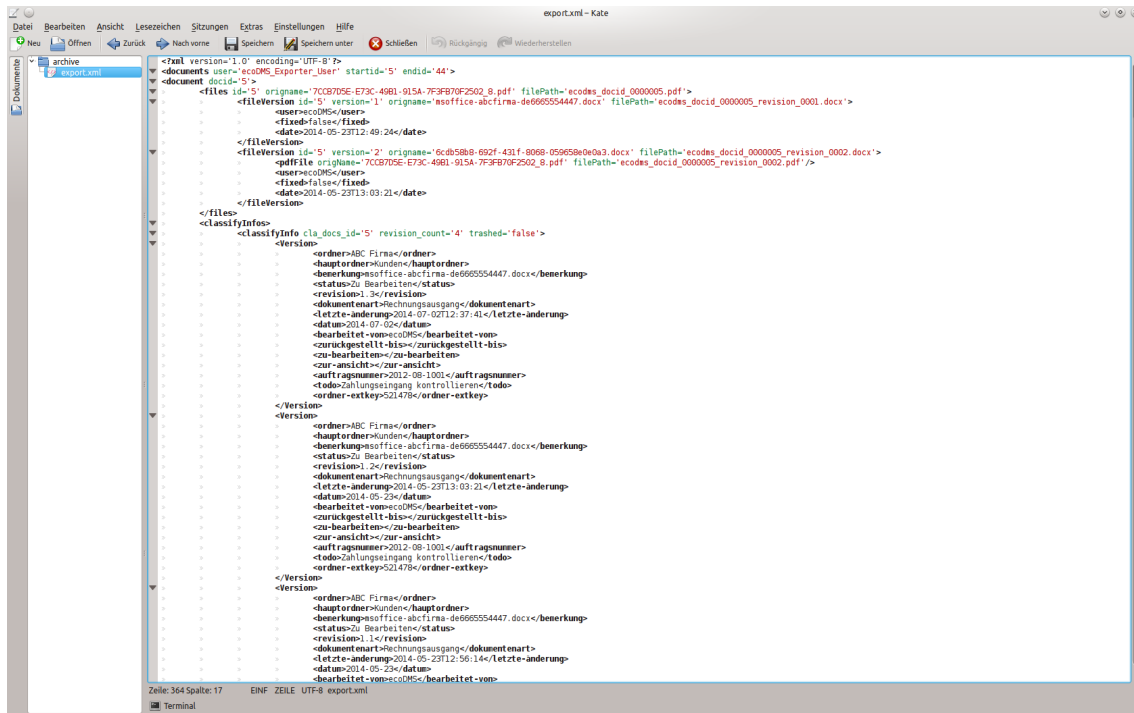
Figure 31.7: Data Export - XML Sample

31.4 Offline Client

With the advanced Data Export ecoDMS also automatically saves an Offline Client. This can be used under Windows and offers all common ecoDMS search functions. This client does not require access to the ecoDMS Server. The entire folder created when "Export Data" can be copied to any data carrier to allow external access to the exported documents without login and without an ecoDMS installation.

- **The executable file "ecodmsclient.exe" is in the directory "offline_export".**

31.4.1 Start Offline Client

After the Data Export ecoDMS deposits a "ZIP file" in the selected destination folder.

1. Unpack the zip file.

2. Click through the folders to the folder which contains the "ecodmsclient" application.

3. Double-click the ecoDMS file to start the offline client.
    a) Now all common search functions, structures and exported documents are available offline.

Important Information for Chapter 31

[1] *This feature requires a licence of the ecoDMS full version but can be tested during the time and is then automatically disabled until a full licence is activated.*

[2] *Viewing and using this function requires specific system permissions.*

[3] *When exporting and sending e-mails from ecoDMS, the comment (attribute) is transferred as filename to the documents. Numbers and letters are transferred.*

32 Web Access & Web Client

With the web interface, documents can be requested from various internet browsers. The Web Client looks very much like the desktop client. To use the web interface, the web service must be started by the administrator via the settings dialogue box in ecoDMS. The Web Client allows reading and writing access to the archive and includes usual ecoDMS functions like archiving and classifying [5, 1, 2, 3, 4].

32.1 Web Access

To use the web interface, the web service has to be started by the administrator via the settings dialogue box in ecoDMS.
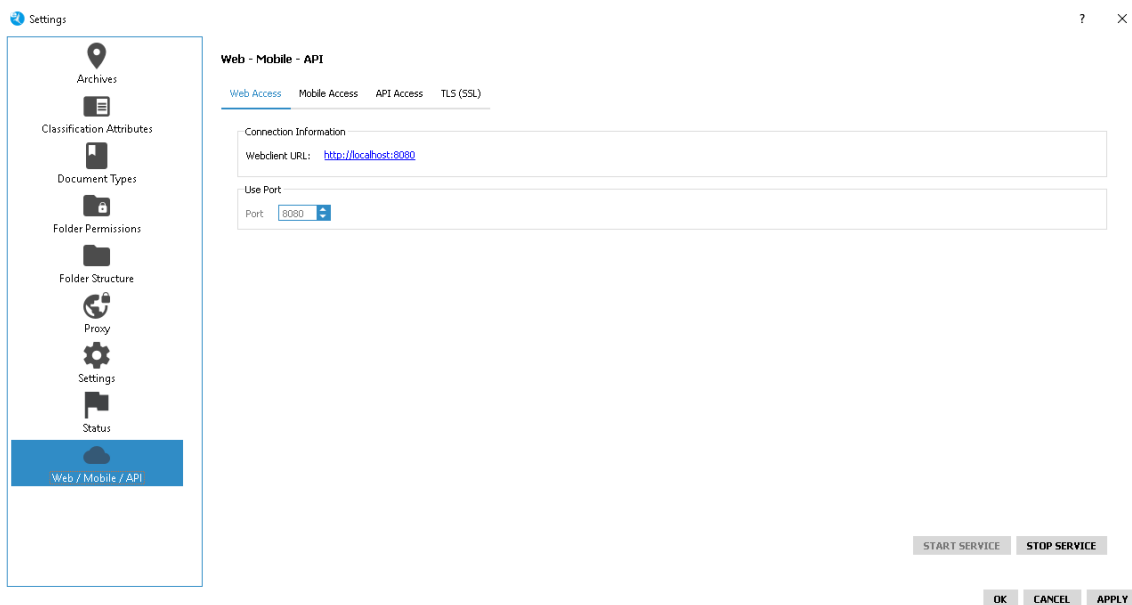
Figure 32.1: Settings - Web - Mobile - API - Web Access

32.1.1 Start Web Service

Start the service to use the web interface. To do so, complete the following steps [5, 1, 2, 3, 4]:

1. Log in as ecoDMS Administrator and open the "Settings dialogue box".

2. Select the tab "Web - Mobile - API -> Web Access" in the Settings dialogue box.

3. Start the service with "Start Service".

    a) The service is started. This process may take some time.

4. The necessary "Web Client URL" is displayed in "Connection Information" area.

5. Click "Apply" to save the process in the Settings dialogue box.

32.1.2 Stop Web Service

To stop the Web Service, complete the following steps [5, 1, 2, 3, 4]:

1. Log in as ecoDMS Administrator and open the "Settings dialogue box".

2. Select the tab "Web - Mobile - API -> Web Access" in the Settings dialogue box.

3. Stop the service with "Stop Service".

   a) The service is stopped. This process may take some time.

4. Click "Apply" to save the process in the Settings dialogue box.

32.1.3 Use Port

As default the web service uses port "8080". Change port as follows [5, 1, 2, 3, 4]:

1. Select the tab "Web - Mobile - API -> Web Access" in the Settings dialogue box.

2. Enter port in the "Port" field.

3. Click "Apply" to save the process in the Settings dialogue box.

32.1.4 Access from Outside

Please read in ecoDMS manual chapter "Connection Manager - Access from Outside".

32.2 Web Interface (Web Client)

With the web interface, documents can be requested from various internet browsers. The Web Client looks very much like the desktop client.

32.2.1 Login and Programme Start

If the web service has started successfully and access to the ecoDMS Server via the browser is allowed, the web interface can be loaded. The login credentials for the web interface is identical with the existing ecoDMS login data. Please note that only users with the appropriate system permissions for this service can use the web interface [5, 1, 2, 3, 4].

1. Open the Web Client URL in your browser.

   a) This is displayed in the web area of your "settings dialogue box" in ecoDMS.

2. The login window for the ecoDMS Web Client opens.

   a) Here you enter your ecoDMS login credentials. To do this, you need to enter your user name and password for ecoDMS.

   b) If your ecoDMS system has different archives (not recommended), you can select them before you log in.

   c) If you tick the "Remember me" checkbox, your login is saved in the browser.

3. Once you have entered / selected all information, click "Login" to start the Web Client.
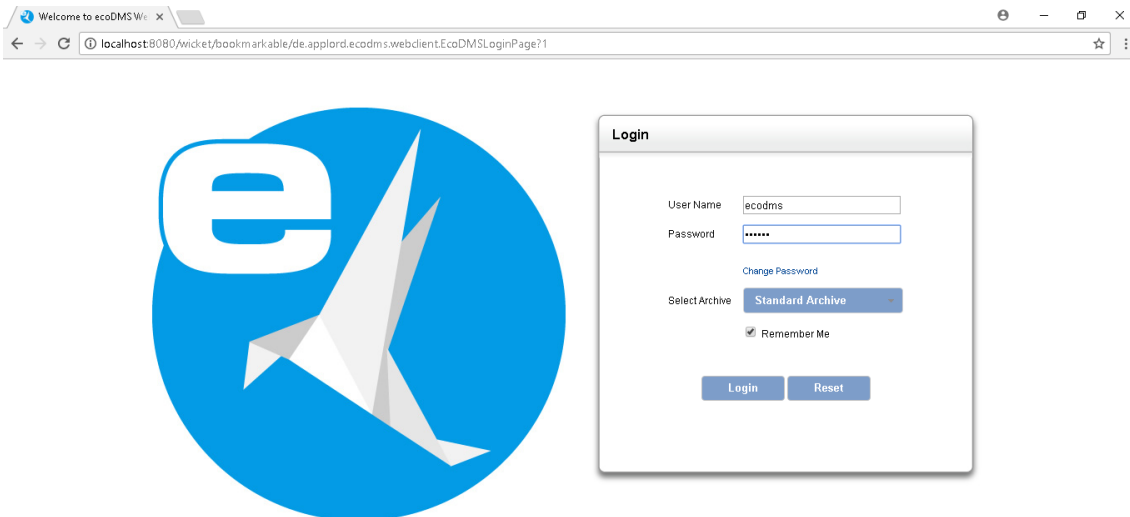
Figure 32.2: ecoDMS Web Client - Login Page
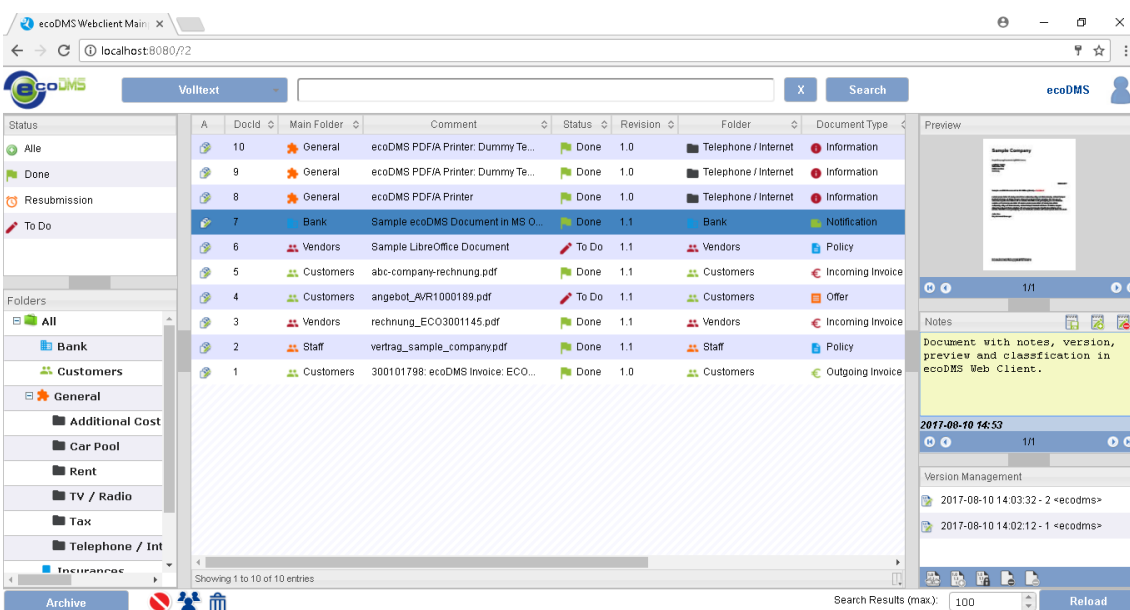
Figure 32.3: ecoDMS Web Client - Interface

32.2.2 Functions of Web Client

With the web interface, documents can be requested from various internet browsers. The Web Client looks very much like the desktop client. The following functions and areas are available [5, 1, 2, 3, 4]:

1. Search- and Filter Functions

   a) Search Bar: Full text search and simple attribute search

   b) Folder and Status Filters

   c) Displaying the maximum output search results in the table

2. Actions

   a) Classification

b) Create new Version

c) History

3. Archive and Classify Documents:
   You can find the button for the archiving of documents in the bottom left of the web interface.

4. Folder Structure

5. Table incl. Classification Attributes

6. Document Preview

7. Version Management

8. Notes Window

9. Login / Logout
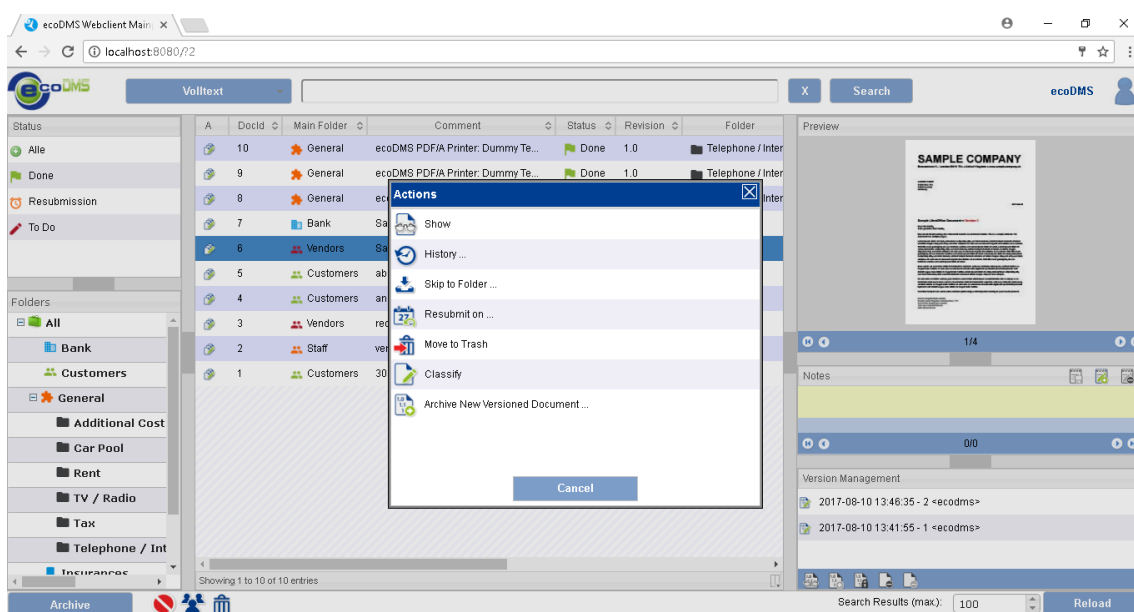
Figure 32.4: ecoDMS Web Client - Interface and Actions

32.2.3 Web Client Language

You can use the Web Client in English and German language.

– The language depends on the language specified in your browser.

– Please refer to the browser manual for more information on language settings.

Important Information for Chapter 32

[1] *A document may only be classified if the user has a permission to classify the specified document.*

[2] *The web client requires a licence for each simultaneous login. If you, for example, want to use the web client parallel to the desktop client, you require 2 licences.*

[3] *This feature requires a licence of the ecoDMS full version but can be tested during the time and is then automatically disabled until a full licence is activated.*

[4] *To use the ecoDMS components, a connection to the ecoDMS server must exist.*

[5] *Viewing and using this function requires specific system permissions.*

33 Mobile Access & Apps

Use the ecoDMS mobile app to search for (full text search), request, view (preview for PDF files), download archived documents and archive documents with a smart phone or tablet. The ecoDMS mobile service facilitates access. [3, 2, 4, 1]

33.1 Mobile Access

In order to use ecoDMS mobile (ecoDMS app for smart phones and tablets), ecoDMS provides a service that manages the communication between the archive system and the mobile devices.

- These connections are encrypted with SSL.

- The connection service only saves data necessary to deliver to the respective device.

- The data and information is not stored permanently.

- By using the connection service, we do not require setting up port forwarding and firewall rules.

- It is currently not possible to operate the connection service locally.

You can find more information in the ecoDMS knowledge database about mobile services and the communication between the app and ecoDMS at www.ecodms.de. (Search term: mobile) To use the mobile apps, the administrator must first start the mobile service through the Settings dialogue box in ecoDMS.
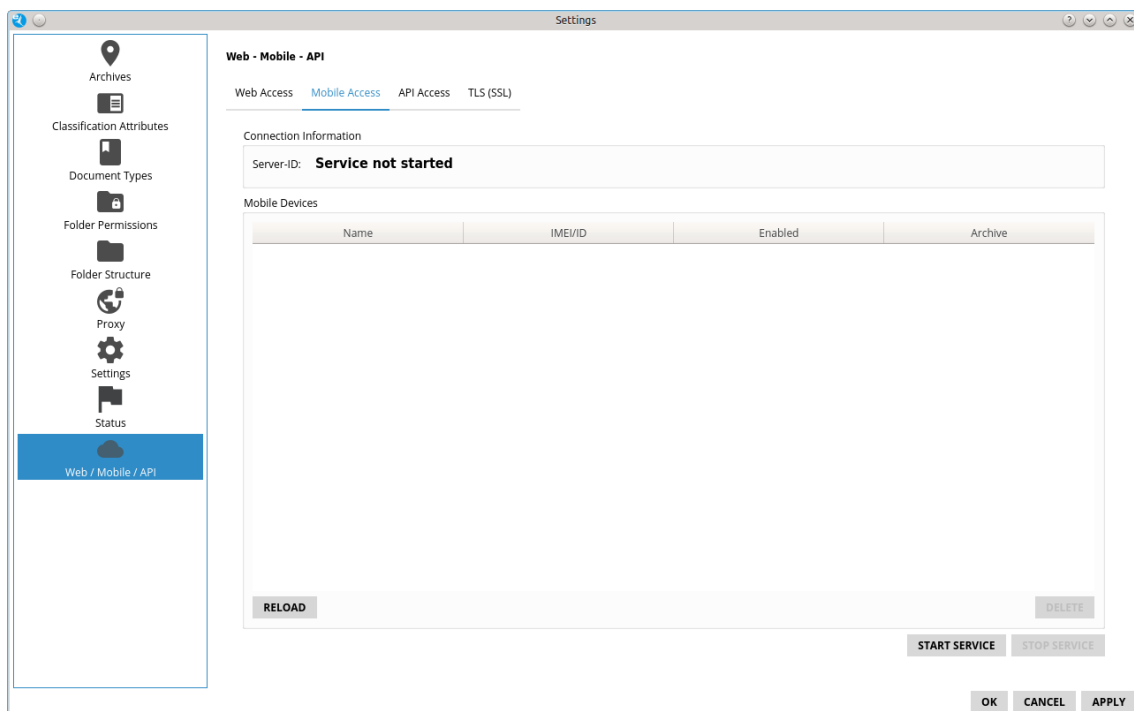
Figure 33.1: Settings - Web - Mobile - API - Mobile Access

33.1.1 Start Mobile Service

Start the service to use the mobile service. Complete the following steps [3, 2, 4, 1]:

1. Log in as ecoDMS Administrator and open the "Settings dialogue box".

2. Select the tab "Web - Mobile - API -> Mobile Access" in the Settings dialogue box.

3. Start the service with "Start Service".
    a) The service is started. This process may take some time.

4. The necessary "Server ID" is displayed in "Connection Information" area.

5. Click "Apply" to save the process in the Settings dialogue box.

33.1.2 Stop Mobile Service

To stop the Mobile Service, complete the following steps [3, 2, 4, 1]:

1. Log in as ecoDMS Administrator and open the "Settings dialogue box".

2. Select the tab "Web - Mobile - API -> Mobile Access" in the Settings dialogue box.

3. Stop the service with "Stop Service".
    a) The service is stopped. This process may take some time.

4. Click "Apply" to save the process in the Settings dialogue box.

33.1.3 Manage Mobile Devices

All devices that should access the archive via the app must be registered first with the ecoDMS Server. To do this, the user must enter the user and connection data in the mobile device for the required ecoDMS profile. The registration requests are displayed in the "Mobile Devices" area and can be activated by the administrator [3, 2, 4, 1].
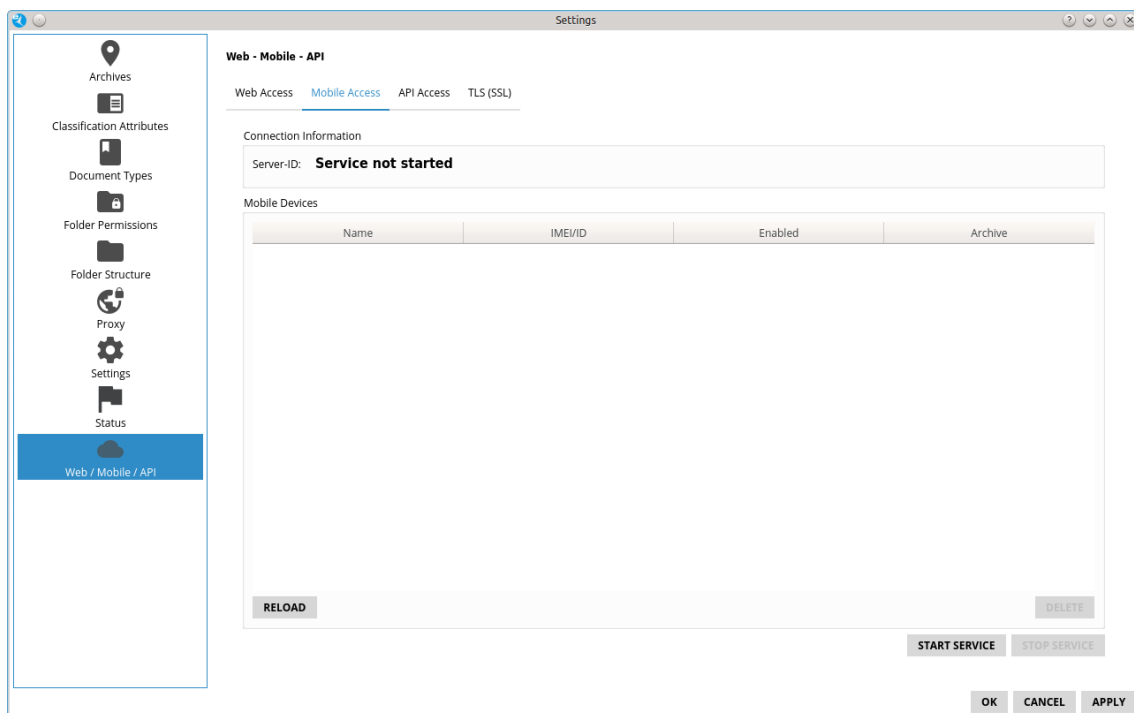
Figure 33.2: Settings - Web - Mobil - API - Mobile Access

33.1.3.1 Retrieve Registration Requests

All devices which should get access to the archive via the app, need to register on your ecoDMS Server first. To retrieve the registration requests, complete the following steps [3, 2, 4, 1]:

1. Log in as ecoDMS Administrator and open the "Settings dialogue box".

2. Select the tab "Web - Mobile - API -> Mobile Access" in the Settings dialogue box.

3. To retrieve the registration requests, click "Reload".

4. A list off all device registrations is displayed.

33.1.3.2 Activate Device

All mobile devices that should have access to the ecoDMS archive must be confirmed by the administrator. To do so, complete the following steps [3, 2, 4, 1]:

1. Select the tab "Web - Mobile - API -> Mobile Access" in the Settings dialogue box.

2. To retrieve the registration requests, click "Reload".

3. A list off all device registrations is displayed.
   a) **Name:** The name of the device is displayed here.
   b) **IMEI/ID:** The International Mobile Station Equipment Identity (IMEI) is a unique 15-digit serial number. About this number the GSM or UMTS device can be identified.
   c) **Enabled:** Put a check mark in this column to enable the mobile service for the device.
   d) **Archive:** Here the ecoDMS archive is displayed, to which the user gets access via the app.

4. Click "Apply" to save the process in the Settings dialogue box.

33.1.3.3 Deactivate Devices

The administrator can block the active devices if necessary, from the mobile service. In order to remove the devices from the mobile service, complete the following steps [3, 2, 4, 1]:

1. Select the tab "Web - Mobile - API -> Mobile Access" in the Settings dialogue box.

2. To retrieve the registration requests, click "Reload".

3. A list off all device registrations is displayed.
   a) **Name:** The name of the device is displayed here.
   b) **IMEI/ID:** The International Mobile Station Equipment Identity (IMEI) is a unique 15-digit serial number. About this number the GSM or UMTS device can be identified.
   c) **Enabled:** Remove the check mark in this column to disable the mobile service for the device.
   d) **Archive:** Here the ecoDMS archive is displayed, to which the user gets access via the app.

4. Click "Apply" to save the process in the Settings dialogue box.

33.1.3.4 Delete Devices

Devices that are not needed or may not have access to the mobile service, can be deleted from the "Mobile Devices" by the administrator. Complete the following steps [3, 2, 4, 1]:

1. Select the tab "Web - Mobile - API -> Mobile Access" in the Settings dialogue box.

2. To retrieve the registration requests, click "Reload".

3. A list off all device registrations is displayed.
   a) If the device is enabled, first disable the access by removing the check mark in the column.

4. Select the entry in list.

5. Click "Delete".

6. Click "Apply" to save the process in the Settings dialogue box.

33.2 Android App

Use the ecoDMS mobile app for Android to search, retrieve, view and download archived documents in the ecoDMS archive. In addition, you can archive files in ecoDMS from your Android device. The following section outlines how to use the app for Android.

33.2.1 Start and Connect App

In order to install the app on your mobile device and connect to the ecoDMS Server, complete the following steps [3, 2, 4, 1]:

1. Search for ecoDMS in the Google Play store and download the ecoDMS app.

2. Then install the "ecoDMS Mobile" app on your device.

3. Start the app.

4. To be able to use the app, you must first create an ecoDMS profile (an ecoDMS account). To do this, click "Yes".
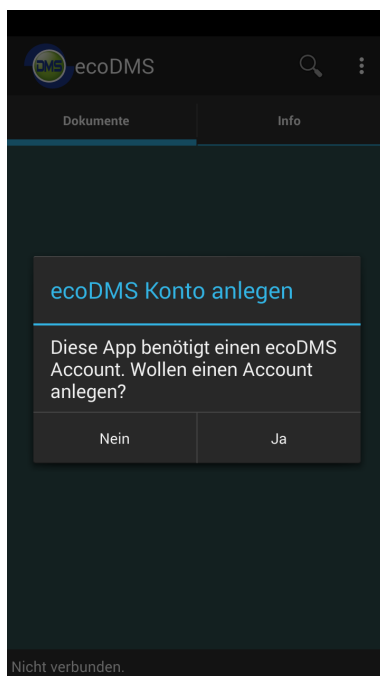
Figure 33.3: ecoDMS Mobile App - Account Request

5. To create an account, you need your server ID (License number) and your personal ecoDMS login data (user name and password of your ecoDMS user).

   a) Enter the information and then click "Register".
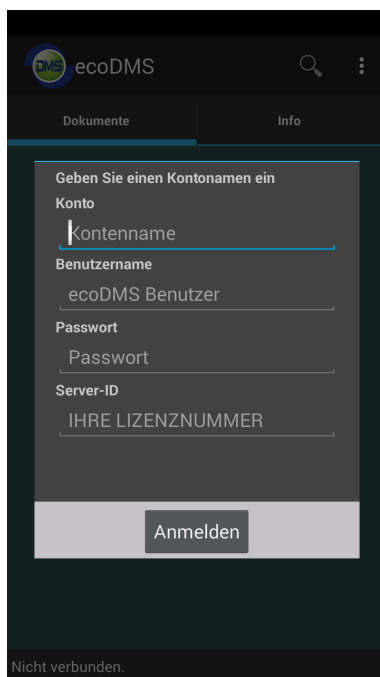
Figure 33.4: ecoDMS Mobile App - Set up Profile

6. Please note: As soon as the administrator has activated the device via the ecoDMS settings dialogue box, you can access the ecoDMS archive via the app. Otherwise a message displays that your mobile phone has sent an activation request to the ecoDMS Server.
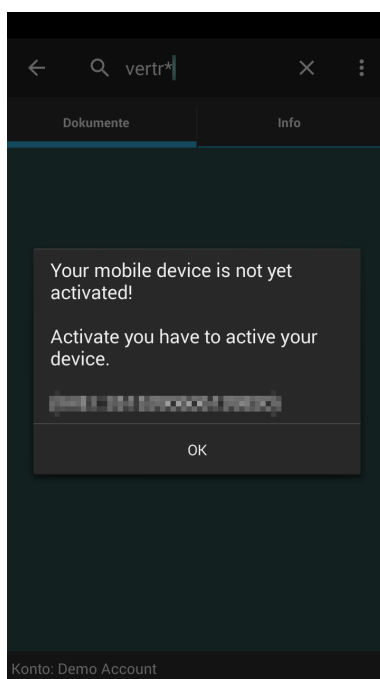
Figure 33.5: ecoDMS Mobile App - Activation Information

7. The administrator has to enable the device using the "settings dialogue box" of ecoDMS. This process is described in the area "Mobile Access" in this manual.
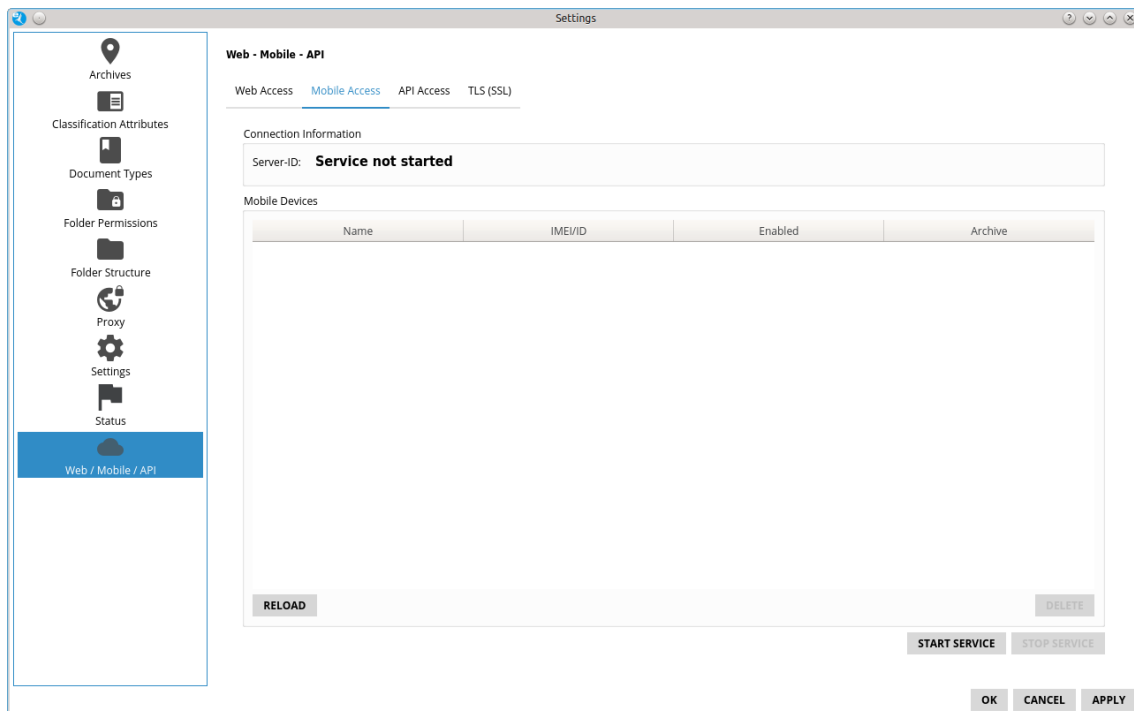
Figure 33.6: ecoDMS Mobile App - Activation via Settings Dialogue Box

8. An empty document list is displayed. However, you cannot make search requests yet. As soon as the administrator has activated your request via the settings dialogue box, you can access the ecoDMS archive via the app (see chapter on "...managing mobile devices").

   a) Exception: You are already using the app and have already downloaded documents from the archive.

Figure 33.7: ecoDMS Mobile App - Empty File list

33.2.2 Profile & Accounts Management

In the app you can create different ecoDMS accounts (profiles). This makes sense, for example, if you are using different ecoDMS Servers (e.g. at various company sites) and/or if you have created several ecoDMS archives. The target archive is selected via the ecoDMS settings dialogue box when you activate the mobile device [3, 2, 4, 1].

33.2.2.1 Create New Account

1. Open the menu for the ecoDMS mobile app.

Figure 33.8: ecoDMS Mobile App - Display Menu

2. Select the function "Manage Accounts...".

   a) The default accounts management of your android system opens.

3. Click "Add Account".

4. Select the "ecoDMS for Android" app.

5. To create an account, you need your server ID (License number) and your personal ecoDMS login data (user name and password of your ecoDMS user). Enter the information and then click "Register".

   a) Enter the information and then click "Register".

Figure 33.9: ecoDMS Mobile App - Setup Profile

6. Please note that you can only use the app after the administrator has activated your profile via the ecoDMS settings dialogue box. A message displays that your mobile phone has sent an activation request to the ecoDMS Server.
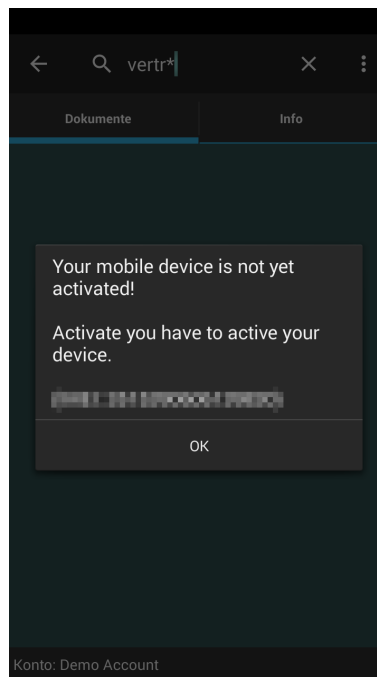
Figure 33.10: ecoDMS Mobile App - Activation Information

7. An empty document list is displayed. However, you cannot make search requests yet. As soon as the administrator has activated your request in the settings dialogue box, you can access the ecoDMS archive via the app (see chapter on "Managing Mobile Devices").

    a) Exception: You are already using the app and have already downloaded documents from the archive.
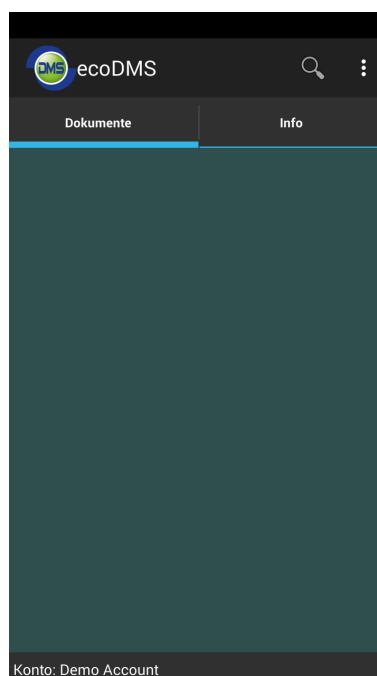
Figure 33.11: ecoDMS Mobile App - Empty List after Start

33.2.2.2 Select Account

If there are several accounts, you can switch between accounts in the app. To do this, complete the following steps:

1. Open the menu for the ecoDMS mobile app.

Figure 33.12: ecoDMS Mobile App - Display Menu

2. Touch the "Select Account" function.

3. Now select the account.
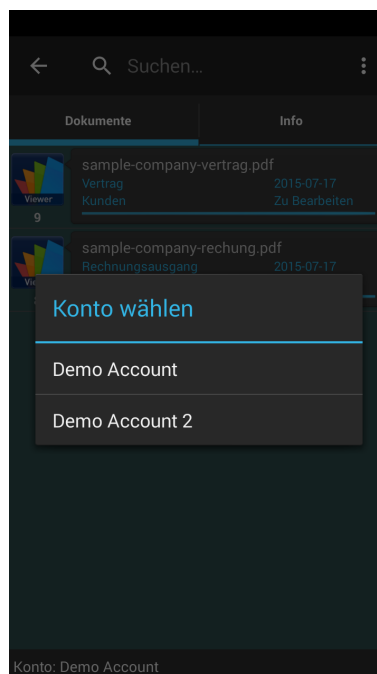
Figure 33.13: ecoDMS Mobile App - Select Account (Profile)

4. All functions and documents of the ecoDMS mobile app are always executed and displayed for the selected account.

   a) In the footer of the app you can see which ecoDMS account is active.

33.2.2.3 Remove Account

To remove an existing ecoDMS account on the mobile device, complete the following steps:

1. Open the menu for the ecoDMS mobile app.
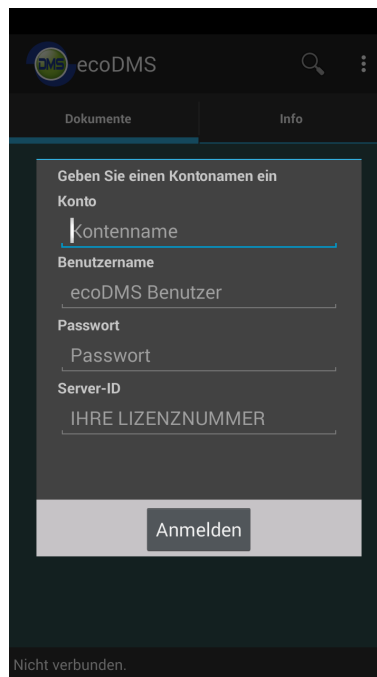
Figure 33.14: ecoDMS Mobile App - Display Menu

2. Select the function "Manage Accounts...".

   a) The default accounts management of your android system opens.

3. Click the account you want to delete.

4. Select the function "Remove Account".

5. Confirm the security message.

   a) Please note that all saved data/documents of the account are deleted. You cannot undo this operation.

6. Attention! If you delete a mobile ecoDMS account, the entry in the settings dialogue box will still be visible and active. We recommend that you also delete the respective entry.
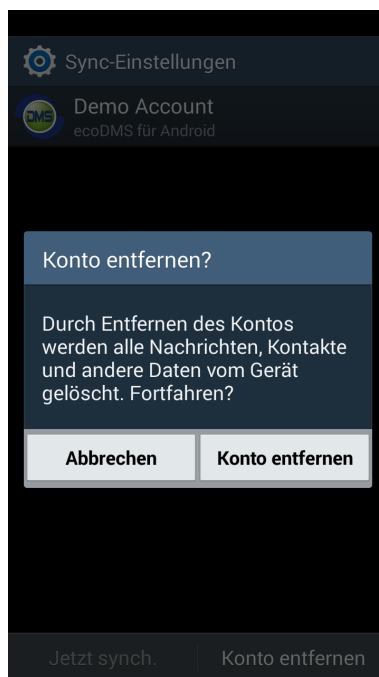
Figure 33.15: ecoDMS Mobile App - Remove Account

33.2.3 Search Document

If you require a document from the archive, finding it is as easy as googling via the ecoDMS mobile app. All the user needs to do is enter the search term in the search line and the document is displayed. The standard full text functions in ecoDMS can be used for the search [3, 2, 4, 1].

Information: After starting the app, ecoDMS first displays an empty document list. Exception: You are already using the app and have already downloaded documents from the archive.
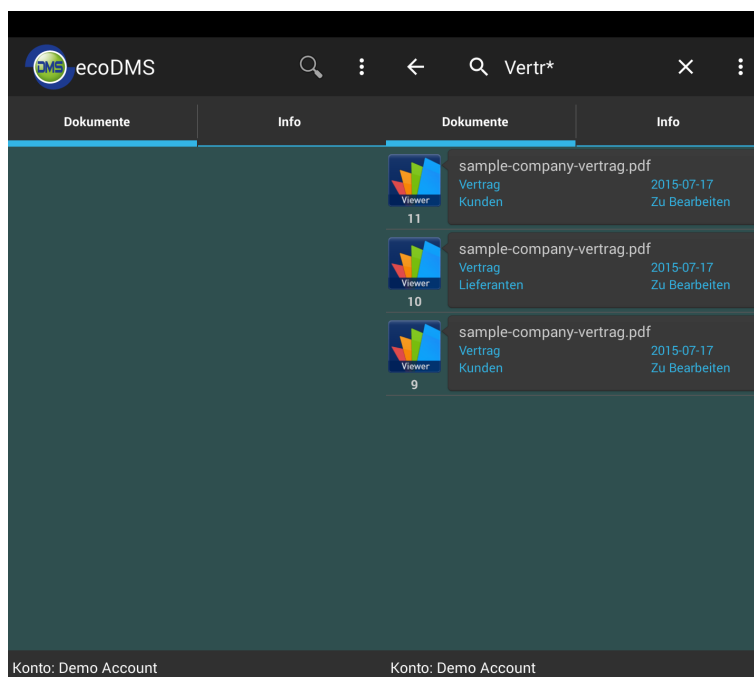
Figure 33.16: ecoDMS Mobile App - Empty List after Start & Search Function

33.2.4 Document Preview

ecoDMS mobile contains a preview function. This displays PDFs only. Depending on file size and volume, it may take a while for the documents to display [3, 2, 4, 1].

1. Click the document to open the preview window. Here you can view the pages of the document.
    a) Alternatively, you can call the preview function when you long-click on the file in the document list.
    b) You can switch between the preview and the document list with the buttons "Documents" and "Info".

2. If your document contains multiple pages, you can turn forward and backward.
    a) Touching the document, the arrow keys will appear. If you touch them, you can scroll forward or backward.
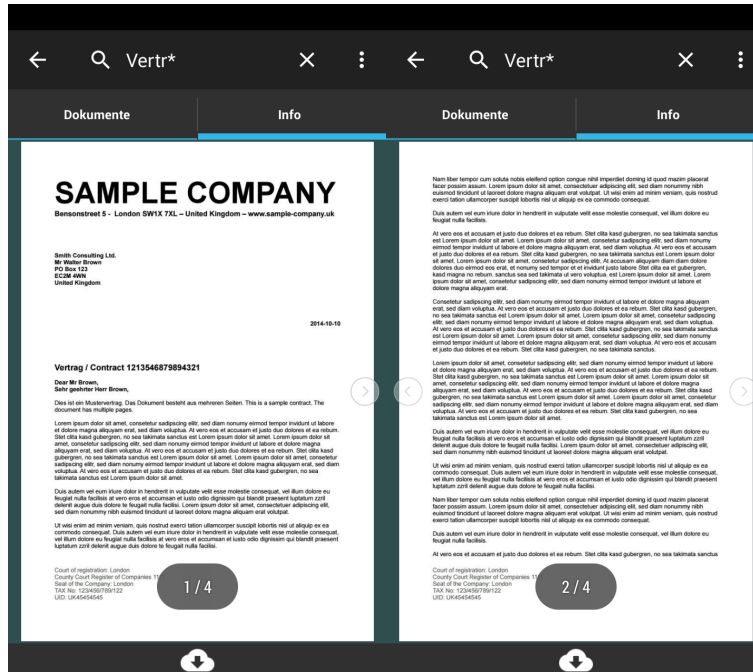
Figure 33.17: ecoDMS Mobile App - Document Preview

33.2.5 Save Document / Download

As an option, documents that are accessed via ecoDMS Mobile can be stored on the mobile device. To start download, complete the following steps [3, 2, 4, 1]:

1. The "Download" icon (cloud) is displayed beneath the preview window. Click this icon to save the file to your device.
    a) Alternatively, you can call the download function when you long-click on the file in the document list.
    b) Once files have been downloaded, the download icon is no longer displayed and is replaced by the following icons /options:
        i. Open Document with [...]
        ii. Share Document with[...]
        iii. Delete Document from Device

Figure 33.18: ecoDMS Mobile App - Download

c) Documents that have already been downloaded are displayed as soon as you open the app and are marked with a line!
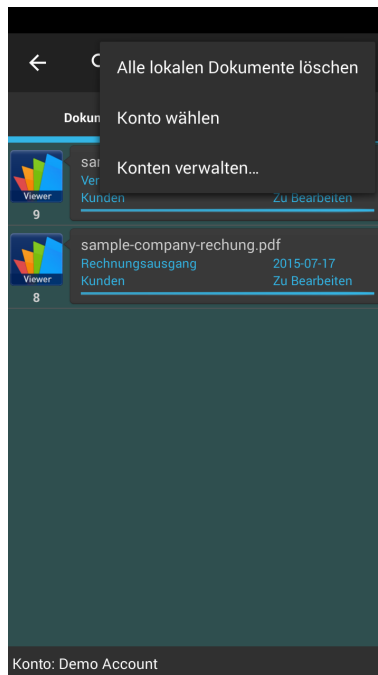
Figure 33.19: ecoDMS Mobile App - Downloaded Documents

33.2.6 Share / Archive Documents

You can archive files from your mobile device via ecoDMS Mobile. To do this, use the Android function "Share" [3, 2, 4, 1].

1. Select a file on your mobile phone.

2. Now click "Share" and select "ecoDMS".

3. Here you can fill in the following classification attributes:
    a) Comment
    b) Status
    c) Document type

4. Click "Archive" to upload the file.

5. The respective user is entered with a permission for this document. The document is archived in the "Not assigned" default folder and you can classify and assign permissions later with the ecoDMS Client on your computer.
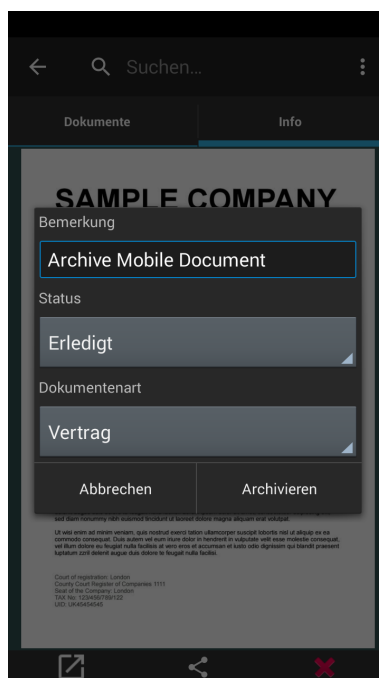
Figure 33.20: ecoDMS Mobile App - Archive / Share File

33.3 iOS App

Use the ecoDMS mobile app for iOS to search, retrieve, view and download archived documents in the ecoDMS archive. In addition, you can archive files in ecoDMS from your iOS device. The following section outlines how to use the app for iOS.

33.3.1 Start and Connect App

In order to install the app on your mobile device and connect to the ecoDMS Server, complete the following steps [3, 2, 4, 1]:

1. Search for ecoDMS in the iOS store and download the ecoDMS app.

2. Then install the "ecoDMS Mobile" app on your device.

3. Start the app.
    a) The ecoDMS start screen opens. Loading the app can take a while.

4. When you start the app for the first time, you must first create an ecoDMS profile.
    a) To do this, click "+" in the app.

ecoDMS Konten	+

| Verbinden | Uploads |
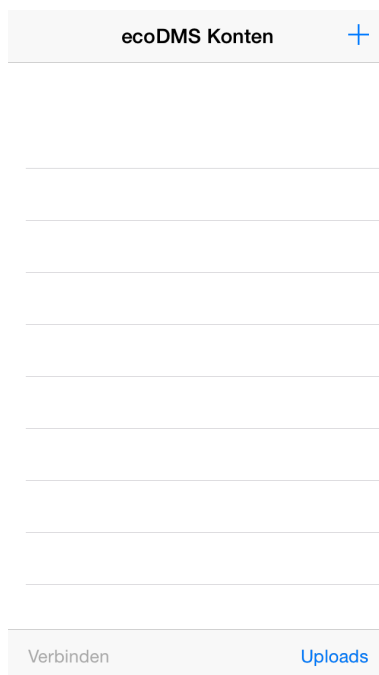
Figure 33.21: ecoDMS Mobile App - iOS Startscreen

5. Now you need your server ID (License number) and your personal ecoDMS login data (user name and password of your ecoDMS user). Enter the information and then click "Ready".

‹ Zurück	Neues Konto	Fertig

Name	Kontoname
Benutzer	Benutzername
Passwort	Passwort
Lizenznr.	Ihre Lizenznummer
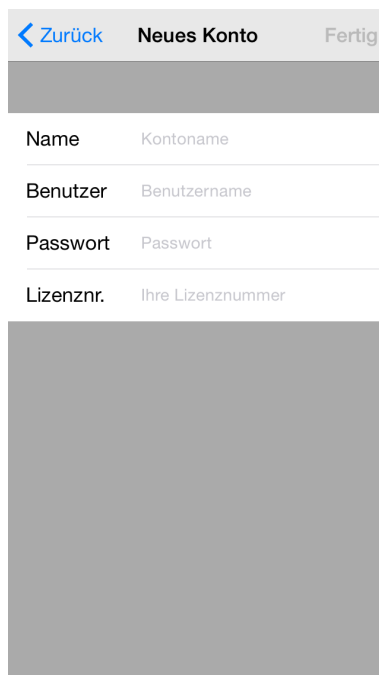
Figure 33.22: ecoDMS Mobile App - iOS Create Profile

6. Your profile will be displayed in the profile list now. However, you cannot connect to the archive yet. A message displays instead that your mobile phone has sent an activation request to the ecoDMS Server. As soon as the administrator has activated the request via the ecoDMS settings dialogue box, you can access the ecoDMS archive via the app.
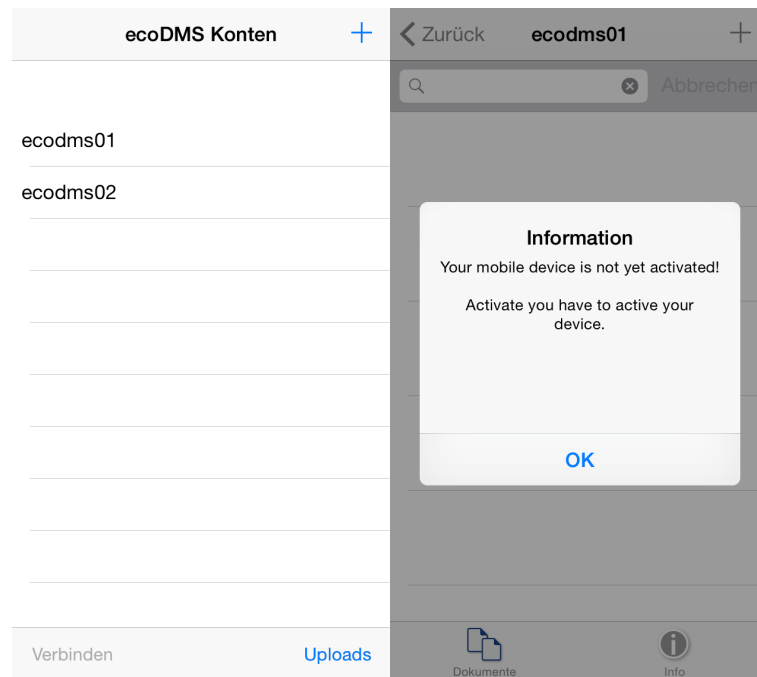
Figure 33.23: ecoDMS Mobile App - iOS Profile List

a) The administrator has to enable the device using the "settings dialogue box" of ecoDMS. This process is described in the area "Mobile Access" in this manual.
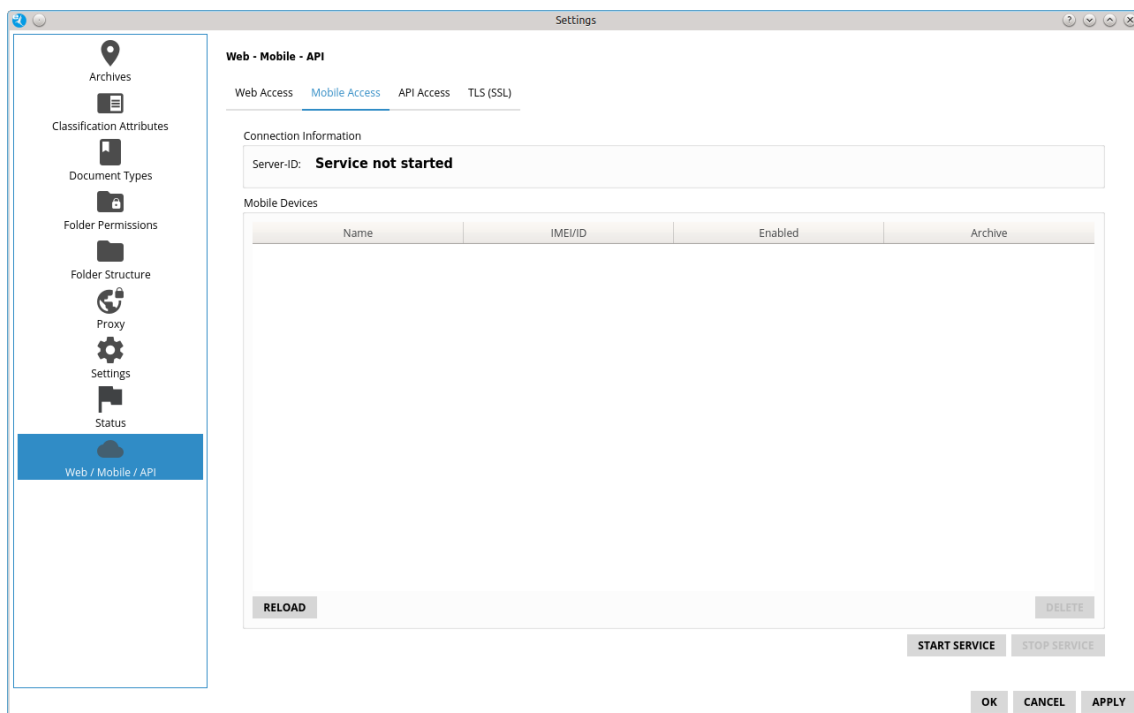
Figure 33.24: ecoDMS Mobile App - Activation via Settings Dialogue Box

7. After the administrator has enabled your registration, you can connect to the archive system via your app.

   a) To do this, select the corresponding account in the app and press the "Activate" link.

ecoDMS Konten	+
ecodms01	
ecodms02	
Verbinden	Uploads
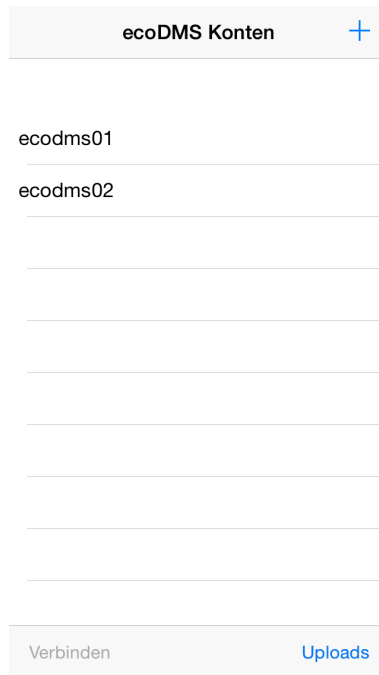
Figure 33.25: ecoDMS Mobile App - iOS Activate Account

33.3.2 Profile & Accounts Management

In the app you can create different ecoDMS accounts (profiles). This makes sense, for example, if you are using different ecoDMS Servers (e.g. at various company sites) and/or if you have created several ecoDMS archives. The target archive is selected via the ecoDMS settings dialogue box when you activate the mobile device [3, 2, 4, 1].

33.3.2.1 Create New Account

1. Open the ecoDMS app and click the "+" character in the "Accounts" area

ecoDMS Konten	+
Verbinden	Uploads
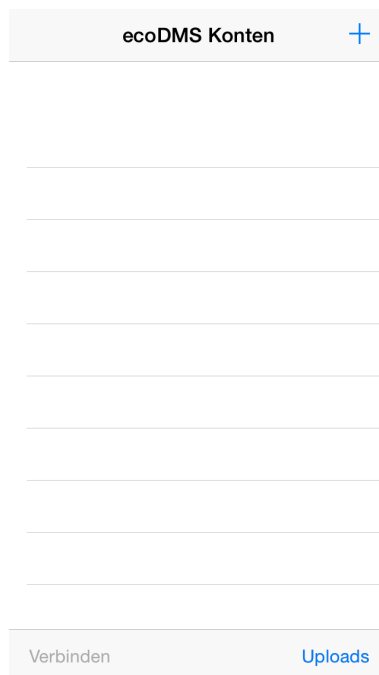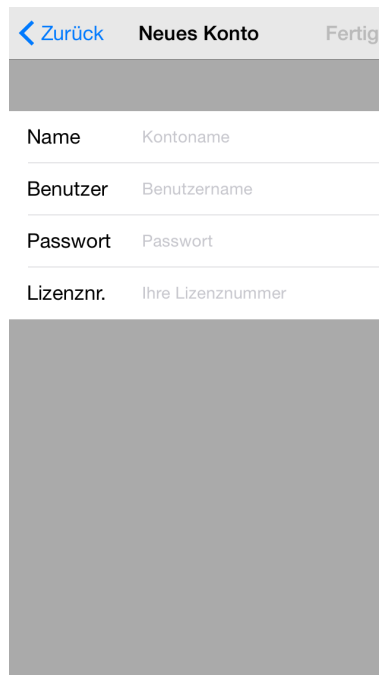
Figure 33.26: ecoDMS Mobile App - Home Screen on iOS

2. To create an account, you need your server ID (License number) and your personal ecoDMS login data (user name and password of your ecoDMS user).

    a) Enter the information and then click "Finished".

Figure 33.27: ecoDMS Mobile App - Create New Account on iOS

3. The account is now displayed in the accounts list. However, you cannot connect to the archive yet. A message displays instead that your mobile phone has sent an activation request to the ecoDMS Server. Once administrator has activated this request in the settings dialogue box, you can access the ecoDMS archive via the app.
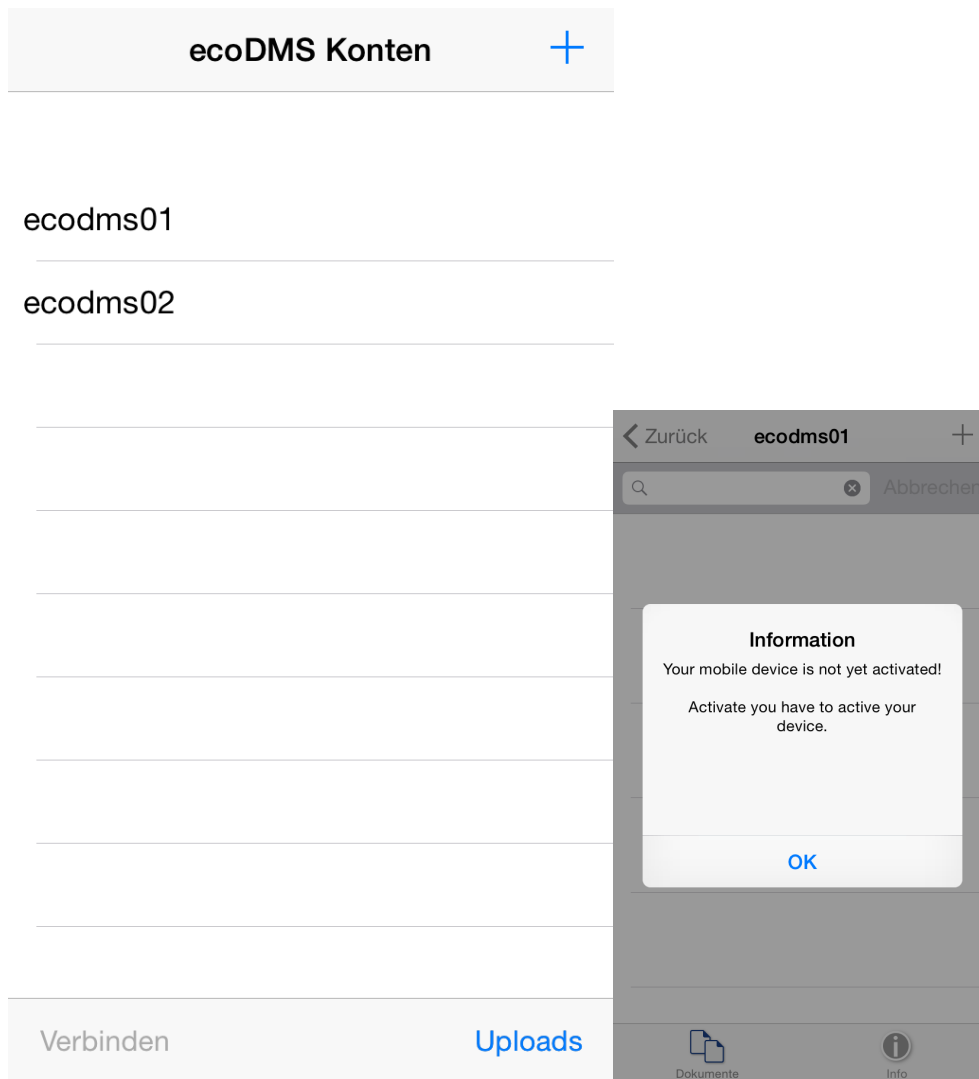
Figure 33.28: ecoDMS Mobile App - Account List on iOS

a) The administrator activates the device via the settings dialogue box. Please refer to the section "Mobile Access" for a detailed description of this process.
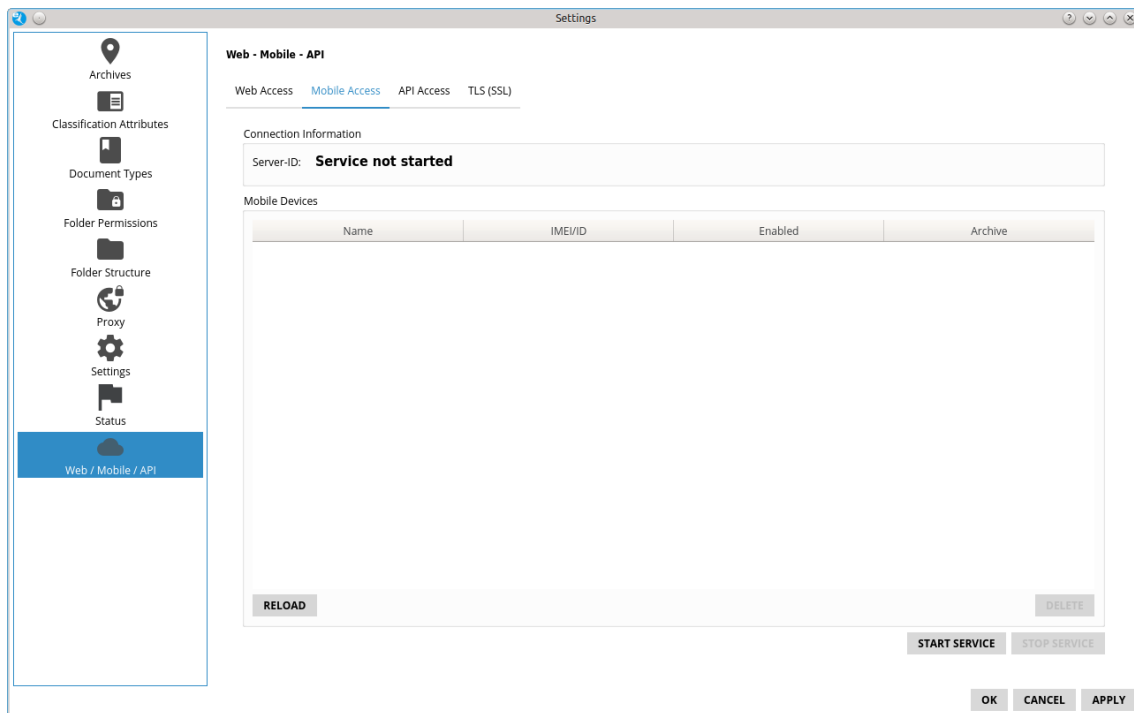
Figure 33.29: ecoDMS Mobile App - Activating the Account with the Settings Dialogue Box

4. After the administrator has confirmed and activated the registration, you can connect the app with ecoDMS.

   a) To do this, select the respective account in the app and press the "Activate" link.
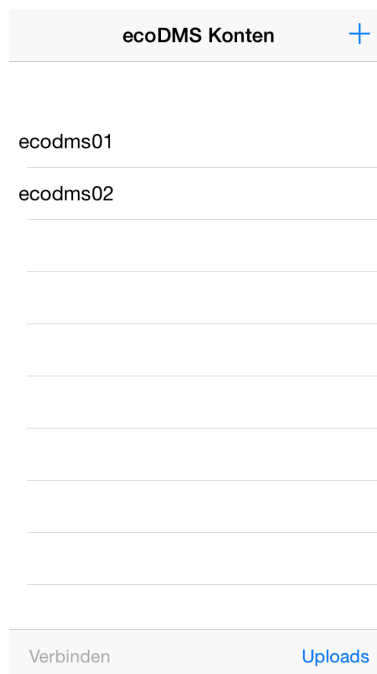
Figure 33.30: ecoDMS Mobile App - Connect Account on iOS

33.3.2.2 Select Account

If there are several accounts, you can switch between accounts in the app. To do this, complete the following steps:

1. Switch to the "Home Page" of the "ecoDMS Accounts" app.

ecoDMS Konten   +

ecodms01

ecodms02

Verbinden   Uploads
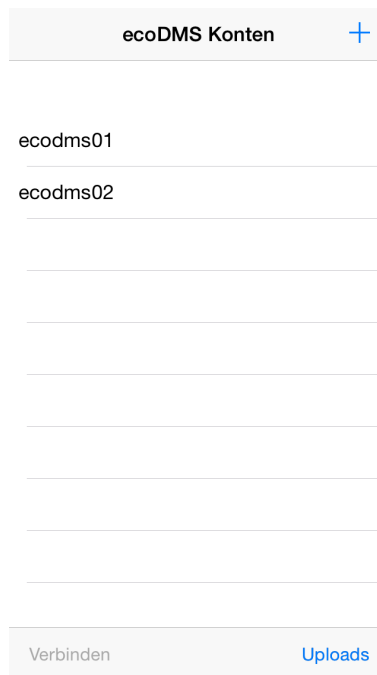
Figure 33.31: ecoDMS Mobile App - Select Account on iOS

2. Now select the account and press the "Connect" link.

3. All functions and documents of the ecoDMS mobile app are always executed and displayed for the selected account.

33.3.2.3 Remove Account

To remove an existing ecoDMS account on the mobile device, complete the following steps:

1. Switch to the "Home Page" of the "ecoDMS Accounts" app.

ecoDMS Konten   +

ecodms01

ecodms02

Verbinden   Uploads
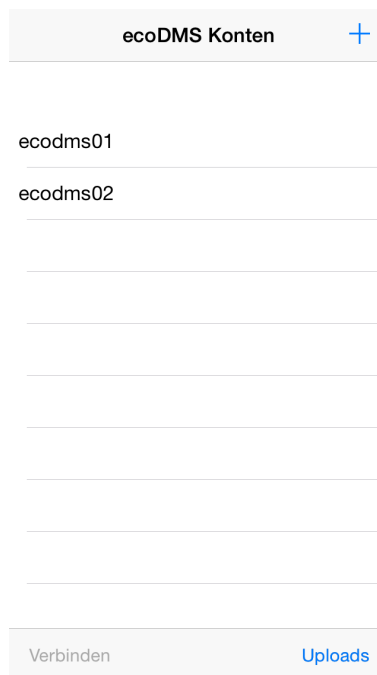
Figure 33.32: ecoDMS Mobile App - Select Account on iOS

2. Long-click the account you want to delete.

3. The functions "Remove" and "Cancel" display. Select the function "Remove".
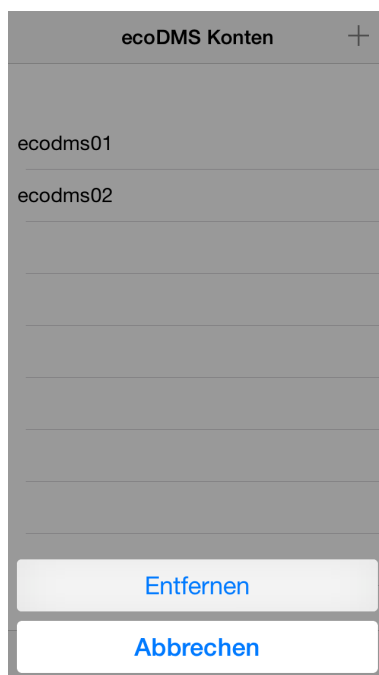
Figure 33.33: ecoDMS Mobile App - Remove Account on iOS

4. Please note that all saved data/documents of the account will be deleted. You cannot undo this operation.

5. Attention! If you delete a mobile ecoDMS account, the entry in the settings dialogue box will still be visible and active. We recommend that you also delete the respective entry.

33.3.3 Search Document

If you require a document from the archive, finding it is as easy as googling via the ecoDMS mobile app. All the user needs to do is enter the search term in the search line and the document is displayed. The standard full text functions in ecoDMS can be used for the search [3, 2, 4, 1].

Information: After starting the app, ecoDMS first displays an empty document list. Exception: You are already using the app and have already downloaded documents from the archive.
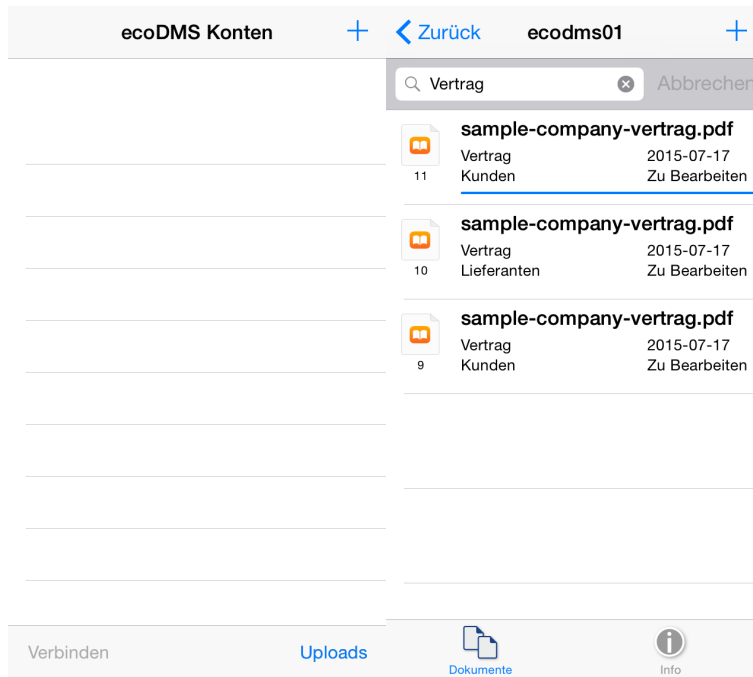
Figure 33.34: ecoDMS Mobile App - iOS Empty Document List & Search Function

33.3.4 Document Preview

ecoDMS mobile contains a preview function. This displays PDFs only. Depending on file size and volume, it may take a while for the documents to display [3, 2, 4, 1].

1. Click the document to open the preview window. Here you can view the document pages.

   a) You can switch between the preview and the document list with the buttons "Documents" and "Info".

2. If a document consists of several pages, you can leaf through the pages.
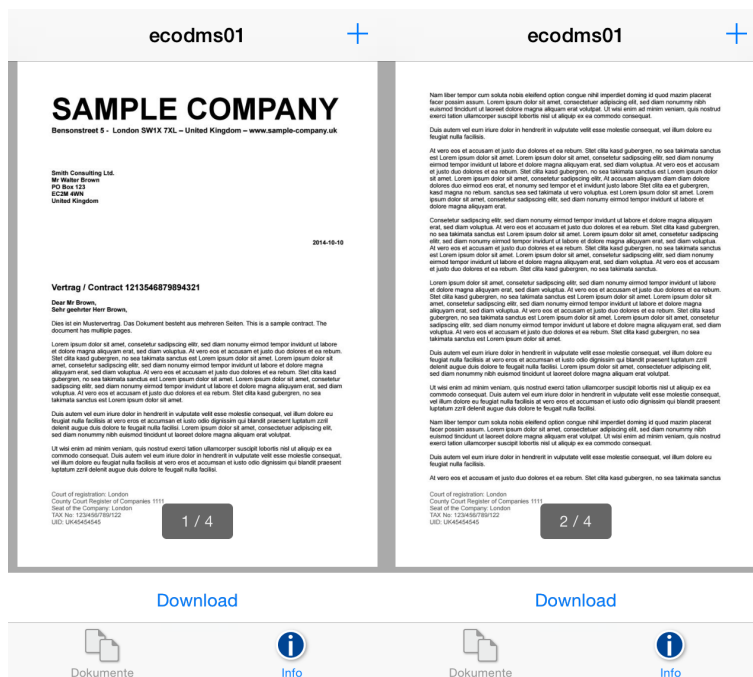
Figure 33.35: ecoDMS Mobile App - iOS Document Preview

33.3.5 Save Document / Download

As an option, documents that are accessed via ecoDMS Mobile can be stored on the mobile device. To start download, complete the following steps [3, 2, 4, 1]:

1. The "Download" button is displayed beneath the preview window. Click this button to save the file to your device.

   a) Once files have been downloaded, the download button is no longer displayed and is replaced by the buttons "Send" and "Open".

Figure 33.36: ecoDMS Mobile App - iOS Download

   b) Documents that have already been downloaded are marked with a line!
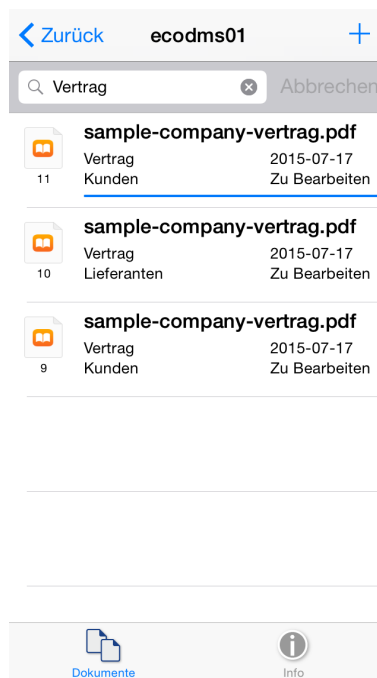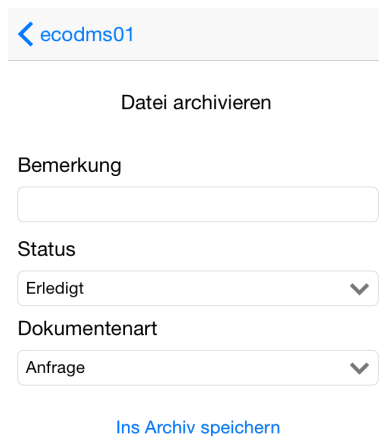
Figure 33.37: ecoDMS Mobile App - iOS Downloaded Documents

33.3.6 Share / Archive Documents

If necessary, you can archive the files from your mobile device. Complete the following steps [3, 2, 4, 1]:

1. Connect to an ecoDMS account via the app.

2. Click the "+" character in the search mask.

3. Select the service / archiving destination of the file.

4. Select a file on your mobile phone.
   a) The file selection may take a few moments.

5. Here you can fill in the following classification attributes:
   a) Comment
   b) Status
   c) Document type

6. Click "Save to Archive" to upload the file.

7. The respective user is entered with a permission for this document. The document is archived in the "Not assigned" default folder and you can classify and assign permissions later with the ecoDMS Client on your computer.

Figure 33.38: ecoDMS Mobile App - Archive file with iOS

8. The "Uploads" area shows an overview of uploaded documents and documents for upload.

| ecoDMS Konten | + | ‹ Zurück | Uploads |

ecodms01

ecodms02

photo.jpg
ecodms01   X

Verbinden   Uploads
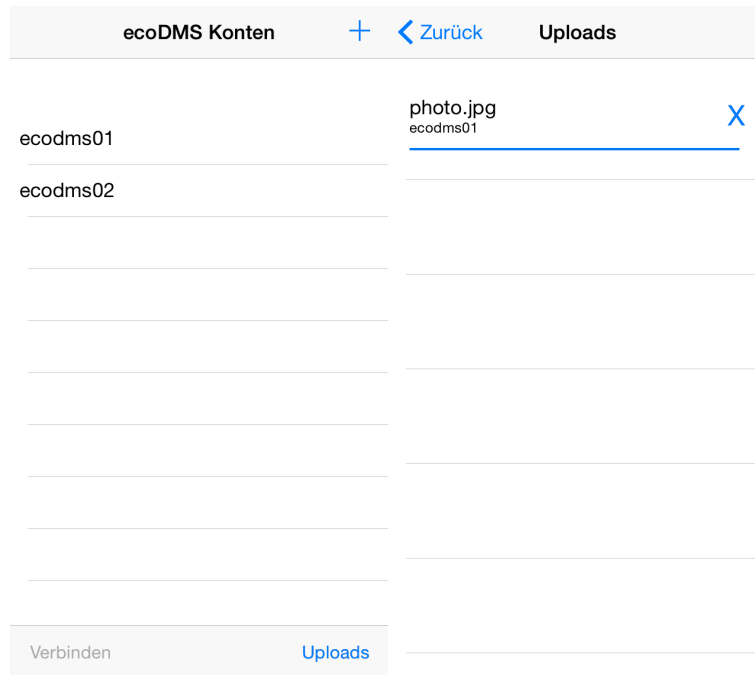
Figure 33.39: ecoDMS Mobile App - Upload List on iOS

Important Information for Chapter 33

[1] *This function requires a licence for the full version of ecoDMS (this function is not available in the trial and Free4Three Edition).*

[2] *This function requires access to the Internet.*

[3] *Viewing and using this function requires specific system permissions.*

[4] *With each ecoDMS licence you purchase, you receive one "free" ecoDMS mobile access. If, for example, you have purchased an ecoDMS licence with 1 simultaneous connection to the archive, you can establish a connection via the connection manager (or, alternatively, via the API or the web client). At the same time, you can install the licence number on a smart phone or tablet. Then you can use a simultaneous connection (= 1 profile) on this device at the same time as a client access. If you wish to connect more mobile devices, profiles or clients with your ecoDMS licence, you require additional ecoDMS licences.*

34 Backup (Data Backup)

With the backup functions of the archiving solution, you can secure your data and restore it if necessary [1, 3, 2].

34.1 Backup - Basics

1. We recommend you execute a data backup every day.

2. You should store the data backup on an external data carrier.

3. While you run the data backup, no other users should be working with ecoDMS or be connected to the ecoDMS Server.

4. The size and the time to complete the backup depends on the amount of data / data size. Depending on the data volume this operation can take a while.

5. Ensure that enough space is available on the destination path to save your backup.

6. ecoDMS saves all settings, user data and classifications in a database.
    a) We use the free, cross-platform postgreSQL component as a database.
    b) The archived files and documents are stored safely encoded in containers within the user's ecoDMS server.

7. The default data volume of such a container is approx. 500 MB. This is a fixed value specified by ecoDMS Archive.
    a) As soon as the data volume is reached, the system automatically creates a new container.

8. During the backup process the containers can be backed up separately and independent of the postgreSQL database.

9. In the Settings dialogue box, you can configure automated, time-controlled backups.
    a) ecoDMS then performs the backup automatically at the specified time.
    b) Data backups can be configured as required.
        i. For example, you can make a full backup of the entire database and the containers.
        ii. Alternatively, you can also make an incremental data backup. In this case ecoDMS Archive will complete the existing backup with the latest changes in the selected rhythm.

10. The oneClick Backup component is an inherent part of the ecoDMS Server installation.
    a) With a mouse-click you can manually initiate a full backup of the entire database and container.
    b) The generated backup file (.zip) can be used to restore data if necessary.

11. As an option, the backup and restore function can also be carried out via console applications.
    a) To do this, either use the integrated ecoDMS script or create your own scripts to call this function.

12. We recommend you completely clear the Inbox before backing up your data.
    a) Background: If the backup is restored on a different operating system (e.g. Windows -> Linux), the paths to the files in the Inbox are no longer correct. You can only delete them from the server via the dialogue box which displays.

34.2 Create Data Backup Automatically

In the Settings dialogue box, you can configure automated, time-controlled backups. ecoDMS then performs the backup automatically at the specified time. Data backups can be configured as required. For example, you can make a full backup of the entire database and the containers. Alternatively, you can also make an incremental data backup. In this case ecoDMS Archive will complete the existing backup with the latest changes in the selected rhythm [1, 3, 2].

- **Make sure that the ecoDMS Server is reachable before you create a backup.**

- **A backup is only possible if the ecoDMS Server is running.**
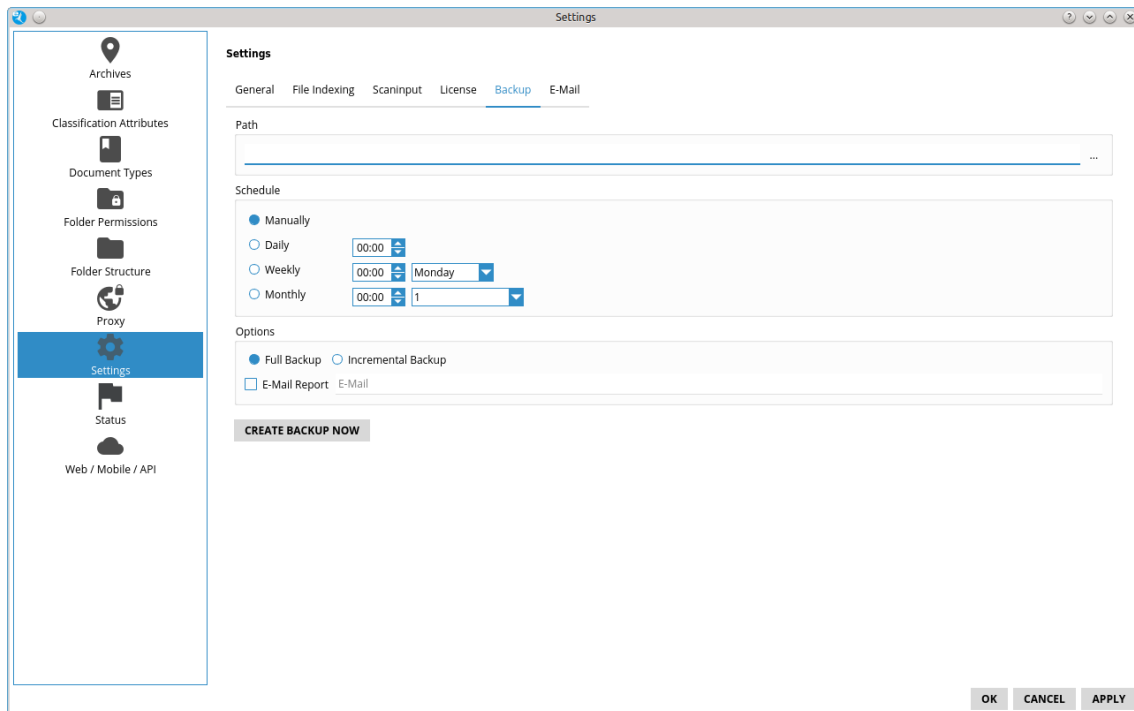
Figure 34.1: Settings - Settings - Backup

This section describes possible settings for automatic backup.

1. Click "Options - Settings" in the ecoDMS Client.

2. Now click "Settings" and open the "Backup Tab".

   a) Make the required settings in this window.

3. **Path for Windows and Linux distributions:** Select the target path for saving backups. ecoDMS saves the backups you create in the selected folder. The ecoDMS server provides the local data carriers for storing backups.

   a) **Target Path for NAS systems via Docker image:** If you want to use the ecoDMS backup and restore function on your NAS, you require a folder for backup and restore (see installation manual). The backup and restore folders should be stored separately from the actual ecoDMS data and backed up accordingly. The mount paths are:

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

   i. In the Settings dialogue box of ecoDMS Client, select the "/srv/data/backup" path on the "Backup" tab and confirm with a double-click.

   ii. The Path box should then display the entry "/srv/data/backup".

4. Select the intervals for your data backup.

a) **Manually:** Enable this setting to manually start the data backup. In this case the backup is created when you click the "Create Backup Now" button.

b) **Daily:** Enable this setting to execute the backup process every day at the same time.

   i. Enter the time at which you want ecoDMS to backup the data.

c) **Weekly:** Enable this setting to execute the backup process every week on the same day and at the same time.

   i. Enter the time at which you want ecoDMS to backup the data.

   ii. Select the weekday.

d) **Monthly:** Enable this setting to execute the backup process every month on the same day and at the same time.

   i. Enter the time at which you want ecoDMS to backup the data.

   ii. Select the day of the month.

5. Enable the type of backup you require. For example, you can make a full backup of all containers. Alternatively, you can also make an incremental data backup.

   a) **Full backup:** If you enable a full backup, ecoDMS executes a backup of all containers at the specified time.

      i. The backup file is saved in the selected folder as a ZIP file.

      ii. The duration of the data backup depends on the data volume of the archived files and the information.

      iii. This type of data backup may be relatively time-consuming because ecoDMS makes a full backup of the database and all containers.

   b) **Incremental backup:** If you enable the incremental backup, ecoDMS executes the data backup step-by-step. In this case ecoDMS completes the existing backup with the latest changes in the selected intervals.

      i. The incremental backup only saves the data that was changed or added since the last backup.

      ii. If you execute the incremental backup, ecoDMS creates five files/folders plus subfolders in the target folder of the backup:

         A. data, ocr, workdir, backup.sql, version

         B. These files/folders are extended during the next incremental backup and must therefore not be moved, renamed or deleted.

      iii. The backup file is saved in the selected folder as an unzipped folder.

      iv. To restore this incremental backup again,

         A. select these files/folders

         B. and create a ZIP file via the context menu.

      v. You can use this ZIP file to restore the entire ecoDMS archive.

      vi. The duration of the data backup depends on the size of the archived files and the information.

      vii. The first execution of the incremental backup may take longer because ecoDMS makes a full backup of the entire database and all available containers.

         A. ecoDMS then adds the latest changes and new data to the existing backup in the specified rhythm.

6. **E-Mail Report:** If you enable this function, ecoDMS sends a process report to the specified recipient after the backup has been executed. You must enter the mail server information on the "Email" tab in the Settings dialogue box (Options - Settings - Settings - Email). ecoDMS sends a report to the recipient(s) via email as soon as the backup has finished.

   a) Enter the recipient email address in the entry box. For example:

   ```
   sample@demomail.de
   ```

   b) Separate several email recipients with a semicolon ";". Example:

   ```
   first@demomail.de;second@demomail.de
   ```

7. **Create backup now:** Click "Create Backup Now" to immediately start the configured data backup (full or incremental backup) regardless of the set interval.

8. Save your settings by clicking "Appy" or abort the process with "Cancel".

9. To close the Settings dialogue box, click the "OK" button.

34.3 Backup (Windows)

In the following the data backup process is described for Windows systems [1, 3, 2].

34.3.1 oneClick Backup (Component)

The oneClick Backup component is an inherent part of the ecoDMS server installation. With a mouse-click you can manually initiate a full backup of the entire database and container. In this case, the entire ecoDMS database, including all documents, structures, settings, users and attributes etc. are saved in a ZIP file. The generated backup file (.zip) can be used to restore data if necessary [1, 3, 2].

1. Make sure that no other users are working with ecoDMS or are connected to the ecoDMS Server.
   a) First, exit all Connection Managers connected to the server.
   b) Check and close all other connections to the server (e.g. web interface, mobile apps...).

2. Start the "oneClick Backup" programme via "Start -> Programme -> ecoDMS Server -> oneClick Backup"

3. The dialogue box "oneClick Backup & Recovery" window opens.

4. Click the "..." button to select a destination folder for the data backup. After the data backup has successfully executed, the backup data is stored in a Zip file in the destination folder.

5. You can specify the compression type in the "Compression" area.
   a) Default
      i. Automatic Mode: In this mode, the system automatically specifies a compression rate.
   b) Best speed:
      i. The backup is compressed faster than in the default speed. However, in this mode the Zip file is larger than in the default mode.
   c) Best compression:
      i. The backup data is compressed to the smallest possible size. Because of the extreme compression, this backup setting needs much more time than the Default and the Best Speed modes.
   d) No compression:
      i. The backup is generated without compression. This is the fastest data backup option. Because the data is not compressed, the completed backup might have a very big data volume and therefore it requires a lot of storage space.

6. Click "Start Backup" to start the data backup.
   a) The duration of the backup depends on the data volume and the system environment. For large data volumes, the backup can take a long time.
   b) The operation is complete when "Finished..." is displayed in the last output line in the dialogue box.

7. Click "Exit" to close the programme.

8. If the operation was successful, you can reconnect the Connection Manager and all other connections to the ecoDMS Server.

Figure 34.2: oneClick Backup - Data Backup

34.3.2 Console Programme for Data Backup

If the ecoDMS Server is installed under Windows, a console backup programme is automatically supplied with the oneClick Backup programme. This can be used, for example, for automatic, time-controlled backups [1, 3, 2].

– You must have administrator rights for this programme.

– When the execution runs via the "task planning", you must select the option "Execute with highest privileges".

– Once the server is installed, the programme is located in the ecoDMS Server folder.

– You can reimport the backup via "ecoDMS oneClick Backup".

1. Make sure that no other users are working with ecoDMS or are connected to the ecoDMS Server.
   a) First, exit all Connection Managers connected to the server.
   b) Check and close all other connections to the server (e.g. web interface, mobile apps...).

2. Syntax-Request:

```
ecoDMSBackupConsole.exe [Backup-Save-Path] [optionally: Compression Rate]
```

3. Parameters:
   – /h displays the programme syntax.
   – Parameter 1 must be a valid folder path. The backup is saved in this folder.
   – Parameter 2 is optional. The compression rate can be selected here.

  - If no parameter is set, the data is zipped with the "default" compression.
  - You can select the following values. The "OneClick Data Backup" chapter provides further explanations.
    * best (best compression)
    * bestspeed (best speed)
    * no (no compression)

4. If the operation was successful, you can reconnect the Connection Manager and all other connections to the ecoDMS Server.

34.4 Backup (Ubuntu / Debian)

In the following the data backup process is described for Ubuntu / Debian systems [1, 3, 2].

34.4.1 oneClick Backup (Component)

The oneClick Backup component is an inherent part of the ecoDMS server installation. With a mouse-click you can manually initiate a full backup of the entire database and container. In this case, the entire ecoDMS database, including all documents, structures, settings, users and attributes etc. are saved in a ZIP file. The generated backup file (.zip) can be used to restore data if necessary [1, 3, 2].

1. Make sure that no other users are working with ecoDMS or are connected to the ecoDMS Server.
   a) First, exit all Connection Managers connected to the server.
   b) Check and close all other connections to the server (e.g. web interface, mobile apps...).

2. Start "ecoDMS oneClick Backup" as root in your console or use the software manager:
   a) Software manager:

Figure 34.3: Open ecoDMS oneClick Backup

   b) Console: The following command must be run as root:

```
/opt/ecodms/ecodmsserver/tools
```

3. The dialogue box "oneClick Backup & Recovery" window opens.

4. Click the "..." button to select a destination folder for the data backup. After the data backup has been successfully executed, the backup data is stored in a Zip file in the destination folder.

5. You can specify the compression type in the "Compression" area.
   a) Default
      i. Automatic Mode: In this mode, the system automatically specifies a compression rate.
   b) Best speed:
      i. The backup is compressed faster than in the default speed. However, in this mode the Zip file is larger than in the default mode.

    c) Best compression:

        i. The backup data is compressed to the smallest possible size. Because of the extreme compression, this backup setting needs much more time than the Default and the Best Speed modes.

    d) No compression:

        i. The backup is generated without compression. This is the fastest data backup option. Because the data is not compressed, the completed backup might have a very big data volume and therefore it requires a lot of storage space.

6. Click "Start Backup" to start the data backup.

    a) The duration of the backup depends on the data volume and the system environment. For large data volumes, the backup can take a long time.

    b) The operation is complete when "Finished..." is displayed in the last output line in the dialogue box.

7. Click "Exit" to close the programme.

8. If the operation was successful, you can reconnect the Connection Manager and all other connections to the ecoDMS Server.
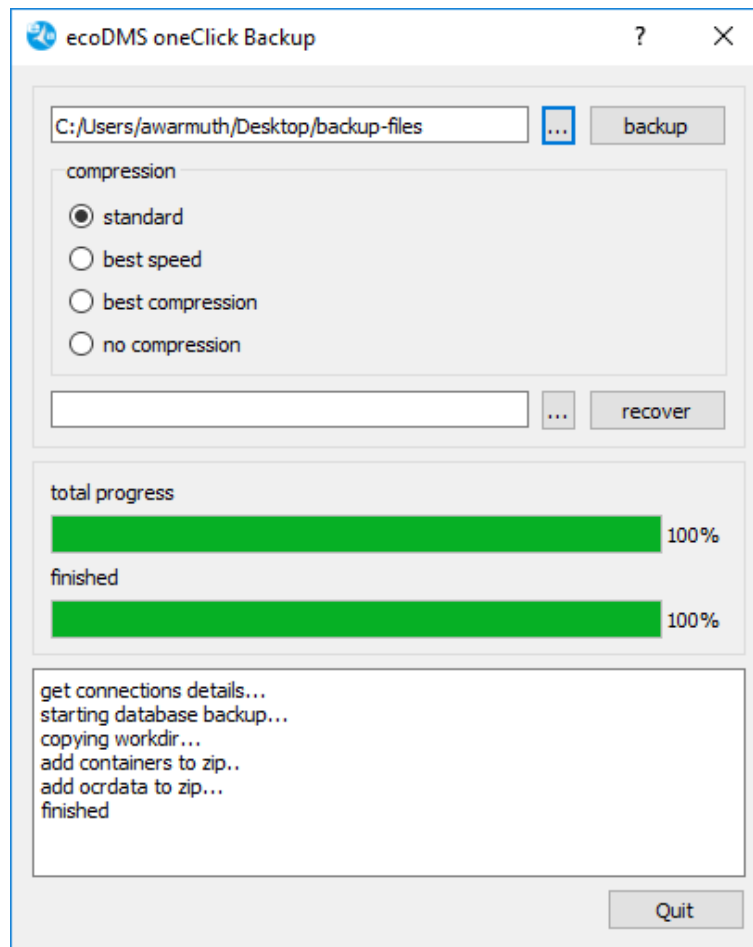

Figure 34.4: oneClick Backup & Recovery

34.4.2 Console Programme for Data Backup

When installing the ecoDMS Server, a file called "ecoDMSBackupConsole" is stored under Ubuntu/Debian in the /opt/e-codms/ecodmsserver/tools folder. When this script executes, it creates a backup of the folder /opt/ecosims/workdir and creates a dump for the database (backup.sql). The files are then saved in a pre-defined destination folder as a zip-file [1, 3, 2].

1. Make sure that no other users are working with ecoDMS or are connected to the ecoDMS Server.
    a) First, exit all Connection Managers connected to the server.
    b) Check and close all other connections to the server (e.g. web interface, mobile apps...).
    The following commands must be run as root.

2. 2. For data backup, enter the following command at /opt/ecodms/ecodmsserver/tools:

```
./ecoDMSBackupConsole /TargetPath [best|bestspeed|no]
```

   a) The brackets contain the optional parameters for the compression. The degree of compression influences the duration of the compression process.
        i. best: the backup is packed with the highest degree of compression
        ii. bestspeed: the backup is packed with the fastest compression
        iii. no: the backup is packed without compression
        iv. If no parameter is given, the data is packed with the default compression.

3. The backup can be recovered as a zip-file using the oneClick Backup, or manually after the zip-file has been extracted.

34.5 Backup (Synology NAS)

The following describes how to backup ecoDMS data on a Synology NAS system [1, 3, 2].

1. Start the ecoDMS container if it is not already running.

2. Make sure that no other users are working with ecoDMS or are connected to the ecoDMS Server.
    a) First, exit all Connection Managers connected to the server.
    b) Check and close all other connections to the server (e.g. web interface, mobile apps...).

3. Open the "backup" folder in the "File Station" of the ecoDMS data folder.

4. Create an empty file "create" and upload it to the "backup" folder.

5. Backup will start automatically after a few seconds.

6. The system then automatically saves the finished backup file in this folder.

7. The system automatically deletes the "create" file after the backup has been processed successfully.

Figure 34.5: Synology - Create Backup

34.6 Backup (QNAP NAS)

The following describes how to backup ecoDMS data on a Synology QNAP system [1, 3, 2].

1. Start the ecoDMS container if it is not already running.

2. Make sure that no other users are working with ecoDMS or are connected to the ecoDMS Server.
    a) First, exit all Connection Managers connected to the server.
    b) Check and close all other connections to the server (e.g. web interface, mobile apps...).

3. Open the "backup" folder in the "File Station" of the ecoDMS data folder.

4. Create an empty file "create" and upload it to the "backup" folder.

5. Backup will start automatically after a few seconds.

6. The system then automatically saves the finished backup file in this folder.

7. The system automatically deletes the "create" file after the backup has been processed successfully.

Figure 34.6: QNAP - Create Backup

Important Information for Chapter 34

[1] *Es wird empfohlen die Inbox vor der Datensicherung vollständig zu leeren. Hintergrund: Wenn das Backup auf einem anderen Betriebssystem (z.B. Windows -> Linux) wiederhergestellt wird, stimmen die Pfade zu den Dateien in der Inbox nicht mehr. Man kann diese dann nur noch über einen eingeblendeten Dialog vom Server löschen.*

[2] *The size and the time to complete the backup depends on the amount of data / data size. Depending on the data volume this operation can take a while. This operation should only be carried out by an experienced administrator.*

[3] *We recommend you execute a data backup every day. You should store the data backup on an external data carrier. While you run the data backup, no other users should be working with ecoDMS or be connected to the ecoDMS Server.*

35 Restore (Data Recovery)

We recommend you execute a data backup every day. To do so, you have various options. Under Windows, ecoDMS contains its own user interface to manually backup and restore your data. The backup can also be executed manually with scripts or with your own tools. In this case, you must make a backup of the entire ecoDMS Server folder. If the database is installed separately, it also needs a backup.

35.1 Restoring Data - Basics

1. During the data recovery process, the ecoDMS Server is stopped. For this reason, no user should be connected with the system.

2. When the data recovery is imported, the existing data store is deleted irrevocably.

3. The duration of the recovery process depends on the data volume and the system environment. The recovery process may take longer for large data volumes.

4. If you want to restore your data based on an incremental backup, you must first create a ZIP file from the following data of your backup:
    a) data, ocr, workdir, backup.sql, version
        i. select these files/folders
        ii. and create a ZIP file via the context menu.
    b) This ZIP file can then be used for the recovery process.

35.2 Restore (Windows)

In the following the data backup process is described for Windows systems.

35.2.1 oneClick Backup (Restore)

Use "oneClick Backup" to reimport your ecoDMS data. This programme is automatically installed as well when you install the "ecoDMS Server" [1].

1. Make sure that no other users are working with ecoDMS or are connected to the ecoDMS Server.
    a) First, exit all Connection Managers connected to the server.
    b) Check and close all other connections to the server (e.g. web interface, mobile apps...).

2. Start the "oneClick Backup" programme via "Start -> Programme -> ecoDMS Server -> oneClick Backup"

3. The dialogue box "oneClick Backup & Recovery" window opens.

4. Click "..." button to select the ZIP file with the data backup.

5. Click the "Start Recovery" button to start the data backup.

6. Read the confirmation prompt and confirm with "Yes".
    a) **Please note that a positive confirmation of this message deletes the current database and replaces it with the backup.**
    b) The duration of the recovery depends on the data volume and the system environment. For large data volumes, the recovery can take a long time.

c) The operation is complete when "Finished..." is displayed in the last output line in the dialogue box.

7. If the operation was successful, you can reconnect the Connection Manager and all other connections to the ecoDMS Server.
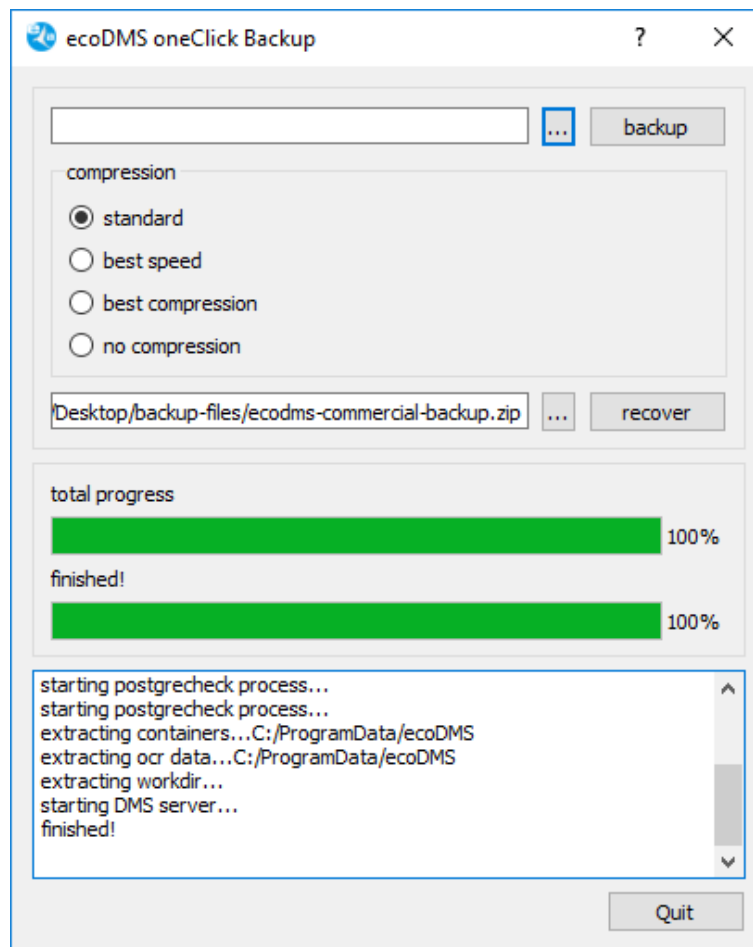
Figure 35.1: oneClick Backup - Restore

35.3 Restore (Ubuntu / Debian)

In the following the data recovery process is described for Ubuntu / Debian systems.

35.3.1 oneClick Backup (Restore)

Use "oneClick Backup" to reimport your ecoDMS data. This programme is automatically installed as well when you install the "ecoDMS Server" [1].

1. Make sure that no other users are working with ecoDMS or are connected to the ecoDMS Server.
    a) First, exit all Connection Managers connected to the server.
    b) Check and close all other connections to the server (e.g. web interface, mobile apps...).

2. Start "ecoDMS oneClick Backup" as root in your console or use the software manager:
    a) Software manager:
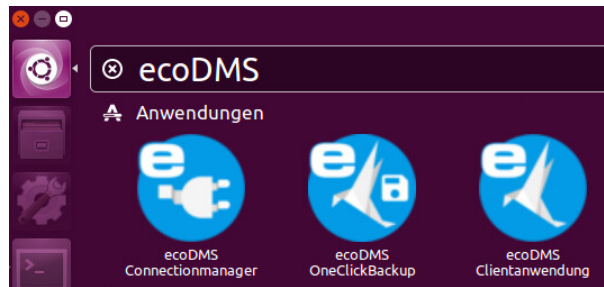
Figure 35.2: Open ecoDMS oneClick Backup

    b) Console: The following command must be run as root:

```
/opt/ecodms/ecodmsserver/tools
```

3. The dialogue box "oneClick Backup & Recovery" window opens.

4. Click "..." button to select the ZIP file with the data backup.

5. Click the "Start Recovery" button to start the data backup.

6. Read the confirmation prompt and confirm with "Yes".

    a) **Please note that a positive confirmation of this message deletes the current database and replaces it with the backup.**

    b) The duration of the recovery depends on the data volume and the system environment. For large data volumes, the recovery can take a long time.

    c) The operation is complete when "Finished..." is displayed in the last output line in the dialogue box.

7. Click "Exit" to close the programme.

8. If the operation was successful, you can reconnect the Connection Manager and all other connections to the ecoDMS Server.

Figure 35.3: oneClick Backup & Recovery

35.3.2 Restore via Console

The following describes how to restore ecoDMS data on a Linux Distribution via Console. The following commands must be run as root.

1. Use the console to open the "tools" folder.

```
/opt/ecodms/ecodmsserver/tools
```

2. Now you need the zip file created via backup. To load the backup, enter the following command:

```
./ecoDMSBackupConsole /PfadzurSicherung.zip restore
```

   a) **Please note that a restore deletes the current database and replaces it with the backup.**

   b) The duration of the recovery depends on the data volume and the system environment. For large data volumes, the recovery can take a long time.

35.4 Restore (Synology NAS)

The following describes how to restore ecoDMS data on a Synology NAS system [1].

1. Make sure that no other users are working with ecoDMS or are connected to the ecoDMS Server.

   a) First, exit all Connection Managers connected to the server.

   b) Check and close all other connections to the server (e.g. web interface, mobile apps...).

2. Stop the ecoDMS container if it is still running.

3. Open the "restore" folder in the "File Station" of the ecoDMS data folder.

4. Copy the backup (created with "oneClick Backup" or "ecoDMSBackupConsole") in the "restore" folder.

5. Rename the backup file to "restore.zip".
    a) Please note the notation (use lower case).

6. Start the ecoDMS container.

7. The data recovery process is executed.
    a) This process may take a while.
    b) If the process is successful, the "restore.zip" file is renamed to "restore-processed.zip".
        i. In case of an error, the system converts the file to "restore-failed.zip".
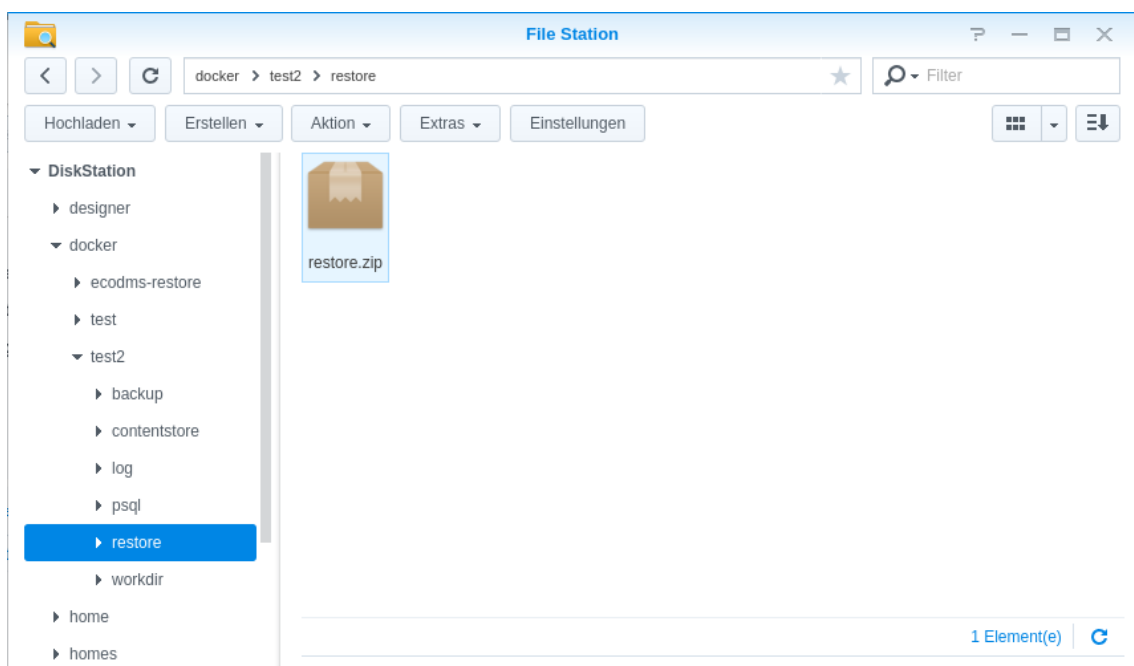
Figure 35.4: Synology - Make Restore

35.5 Restore (QNAP NAS)

The following describes how to restore ecoDMS data on a QNAP NAS system [1].

1. Make sure that no other users are working with ecoDMS or are connected to the ecoDMS Server.
    a) First, exit all Connection Managers connected to the server.
    b) Check and close all other connections to the server (e.g. web interface, mobile apps...).

2. Stop the ecoDMS container if it is still running.

3. Open the "restore" folder in the "File Station" of the ecoDMS data folder.

4. Copy the backup (created with "oneClick Backup" or "ecoDMSBackupConsole") in the "restore" folder.

5. Rename the backup file to "restore.zip".
    a) Please note the notation (use lower case).

6. Start the ecoDMS container.

7. The data recovery process is executed.
    a) This process may take a while.
    b) If the process is successful, "restore.zip" file is renamed to "restore-processed.zip".
        i. In case of an error, the system converts the file to "restore-failed.zip".
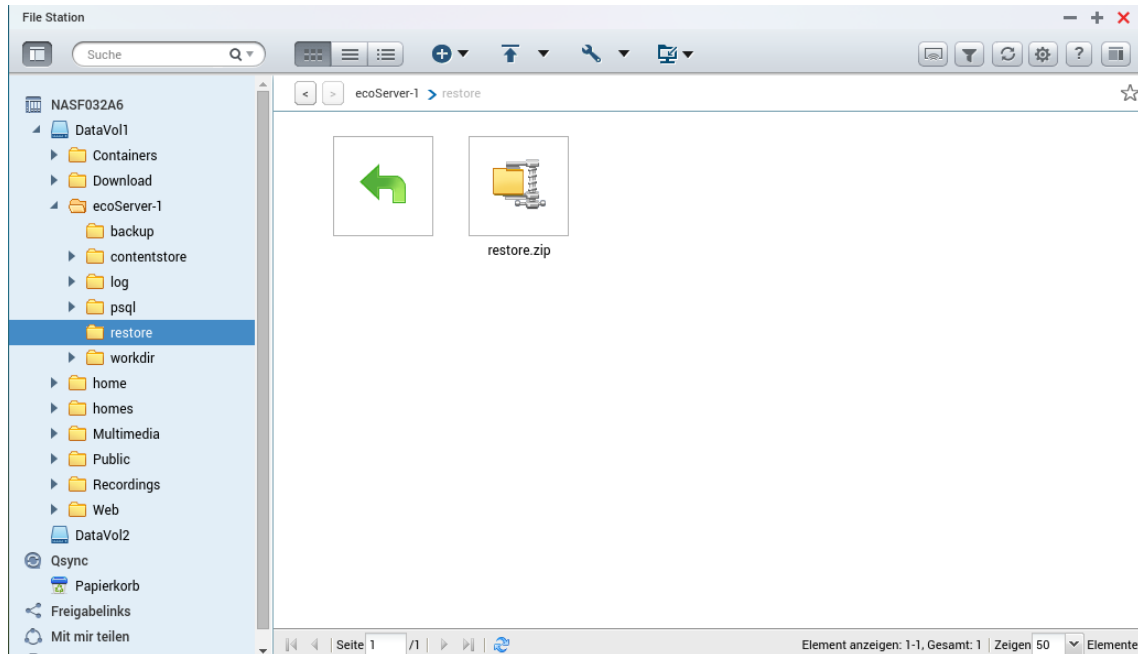
Figure 35.5: QNAP - Make Restore

Important Information for Chapter 35

[1]   *You should store the data backup on an external data carrier. During the data recovery process, the ecoDMS server is stopped. For this reason no user should be connected with the system. When the data recovery is imported, the existing data store is deleted irrevocably. This operation should only be carried out by an experienced administrator.*

36 ecoDMS Server

Being a client-server system, ecoDMS saves all settings, user data and classifications in a database. The archived files and documents are stored safely encoded in containers within the user's ecoDMS server. Spreading information across containers and a database offers more security and flexibility when managing data.

36.1 postgreSQL Database

Being a client-server system, ecoDMS saves all settings, user data and classifications in a database. We use the free, cross-platform postgreSQL component as a database. In contrast to most other databases, the database volume of postgreSQL is virtually unlimited. As postgreSQL is an open source database, there is no additional cost for using this database.

36.2 Container Storage System

The archived files and documents are stored safely encoded in containers within the user's ecoDMS server. The default data volume of such a container is approx. 500 MB. This is a fixed value specified by ecoDMS Archive. As soon as the data volume is reached, the system automatically creates a new container. The "full" container, of course, will continue to exist. The maximum number of containers is unlimited in ecoDMS Archive. The automatic generation of different containers makes data backup much easier. During the backup process the containers can be backed up separately and independent of the postgreSQL database.

36.3 Stop ecoDMS Server

This chapter describes how the ecoDMS server can be stopped when needed.

36.3.1 Windows: Explanation

To stop the server under Ubuntu / Debian, complete the following steps:

1. Make sure that no other users are working with ecoDMS or are connected to the ecoDMS server.
    a) First, exit all Connection Managers connected to the server.
    b) Check and close all other connections to the server (e.g. web interface, mobile apps...).
2. Open the "service management" of your windows system.
3. Select the services "ecoDMS Server 16.09".
4. Click "Stop the service".
    a) The server is stopped (this may take some time).
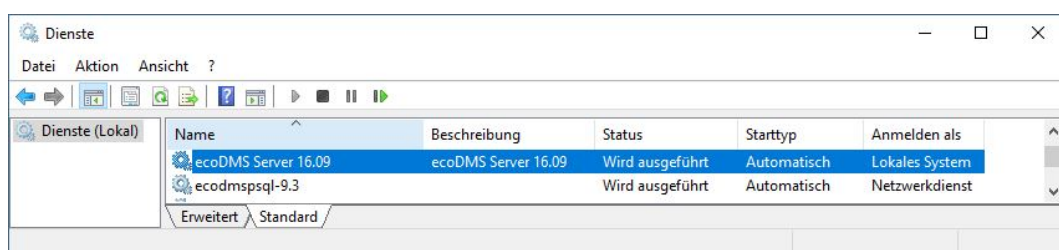
Figure 36.1: Windows - Services (16.09)

36.3.2 Ubuntu / Debian: Explanation

To stop the server under Ubuntu / Debian, complete the following steps:

1. Make sure that no other users are working with ecoDMS or are connected to the ecoDMS server.

    a) First, exit all Connection Managers connected to the server.

    b) Check and close all other connections to the server (e.g. web interface, mobile apps...).

2. Open the console.

3. Stop the server with the following command:

```
sudo service ecodms stop
```

36.4 Start ecoDMS Server

This chapter describes how the ecoDMS server can be started when needed.

36.4.1 Windows: Explanation

To (re)start the server under Windows, complete the following steps:

1. Make sure that no other users are working with ecoDMS or are connected to the ecoDMS server.

    a) First, exit all Connection Managers connected to the server.

    b) Check and close all other connections to the server (e.g. web interface, mobile apps...).

2. Open the "service management" of your windows system.

3. Select the services "ecoDMS Server 16.09".

4. Click "Start the service"".

    a) The server is started (this may take some time).

5. If the operation was successful, you can reconnect the Connection Manager and all other connections to the ecoDMS server.

    a) Please note that depending on the computer, the server might need some time until it is completely booted and the connection is established. Please wait a few minutes and then try to connect to the server.
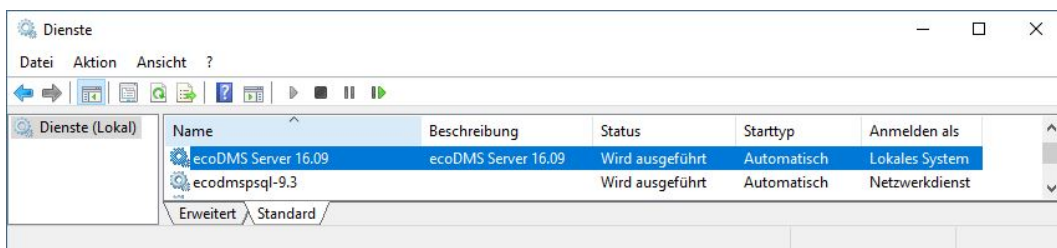
Figure 36.2: Windows - Services (16.09)

36.4.2 Ubuntu / Debian: Explanation

To start the server under Ubuntu / Debian, complete the following steps:

1. Make sure that no other users are working with ecoDMS or are connected to the ecoDMS server.

    a) First, exit all Connection Managers connected to the server.

    b) Check and close all other connections to the server (e.g. web interface, mobile apps...).

2. Open the console.

3. Start the server with the following command:

```
sudo service ecodms start
```

4. f the operation was successful, you can reconnect the Connection Manager and all other connections to the ecoDMS server.

    a) Please note that depending on the computer, the server might need some time until it is completely booted and the connection is established. Please wait a few minutes and then try to connect to the server.

37 PDF/A Printer

The virtual PDF/A printer from ecoDMS enables easy archiving of documents from printable applications, such as picture and graphic programmes, inventory management systems and many more as a PDF-A document. The PDF/A Printer is a printer driver dedicated to archiving documents in ecoDMS. It forms the interface to external programmes and then allows quick and prompt document archiving. Moreover, a simple click on the print function of the respective programme saves the files directly in the appropriate folder and for the right person [3].

37.1 Setup PDF/A Printer (Windows)

You can configure various options for the PDF/A Printer. You can configure several print profiles. The most important thing is not to rename the standard printer. However, you can, of course, give the new print profiles customised names [2, 3].

1. In the Windows operating system, "Devices and Printers" window.

   a) You can usually find this window in the control panel of your operating system.

   b) Example:

   ```
   Control Panel\Hardware and Sound\Devices and Printers
   ```

2. Select the ecoDMS printer. Now click "Print server properties" in the current Windows dialogue box.

3. The "Print Server Properties" window opens.

4. Select the "Ports" tab. Click the "Configure Port" button.

   a) You must click this button because the following settings must be performed as administrator.

5. To get to the dialogue box with the ecoDMS printer options, select the "ECODMS" port.

6. Now click "Configure".

7. Configure the settings for the printer at your work station, which can also be saved as different printers / print profiles. You can save any number of different print profiles with different settings on your PC.
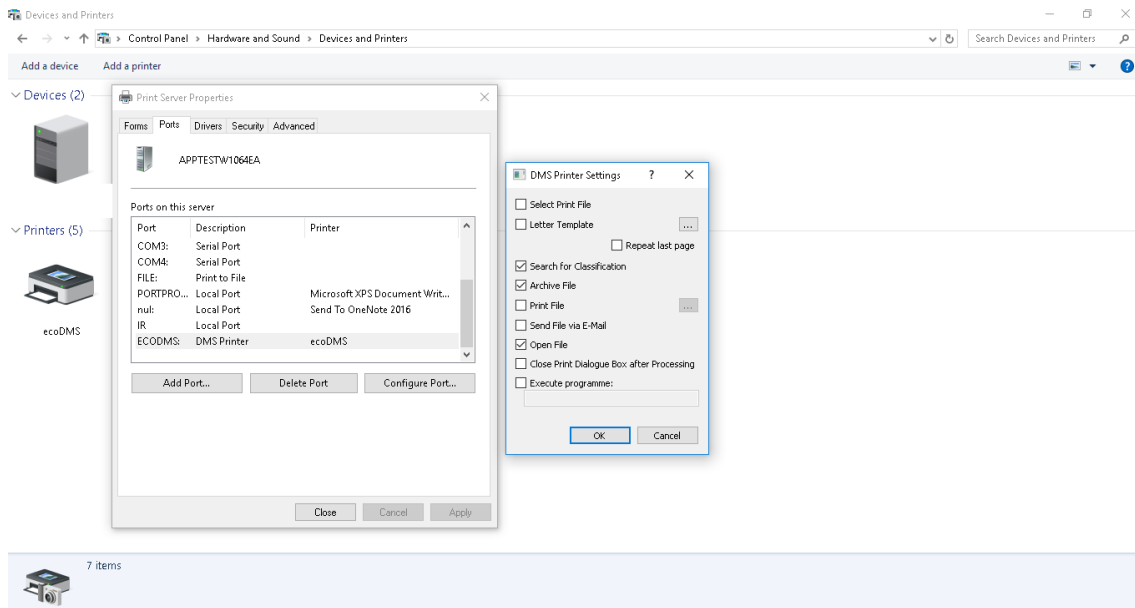
Figure 37.1: PDF/A Printer - Settings

37.1.1 Select Print File

If this function is enabled, the memory location on the file system is requested for this file when printing with this this print profile (after the PDF/A file has been created). For example, you can save a document as PDF/A file on the file system instead of, or in addition to, the archive.

37.1.2 Letter Template

A letter template can be assigned to the PDF/A files when they are created, so that the PDF/A file appears in the same design as the printed document on physical letter paper.

1. Enable the "Letter Template" function

2. Select the letter template you want to deposit as a background for the created documents, from your file system.

    a) When printing via this print profile, the letter template is added to the PDF/A as a background image.

37.1.3 Search for Classification

If this function is enabled, ecoDMS searches for matching classification templates when you archive a document via the PDF/A Printer.

37.1.4 Archive File

If this function is enabled, the document can be classified and archived in ecoDMS when printing with this print profile (after the PDF/A file has been created).

37.1.5 Print File

If this function is enabled, the document can be printed in paper form when printing with this print profile.

1. Enable the "Print file" function.

2. Select the destination printer.

37.1.6 Send File via E-Mail

If this function is enabled, the document can be E-Mailed while printing with this print profile (after creating the PDF/A file).

1. Enable the "Send file via E-Mail" function.

2. If you select this print profile, the email window automatically opens after the PDF/A file has been created.

3. The document is added as an attachment.

4. Recipient, sender and text, etc., can be assigned freely, as usual.

37.1.7 Open File

If this function is enabled, the finished document is opened after the PDF/A file has been created).

37.1.8 Close Print Dialogue Box after Processing

If this function is enabled, the Print dialogue box is closed after the specified functions have been processed.

37.1.9 Execute Programme

If this function is enabled, a programme starts after the specified functions have been processed. You can enter the application you want to start here.

37.2 Archiving via PDF/A Printer

To archive documents via the PDF/A Printer, complete the following steps [3]:

1. Select the function "Print" in your active programme.
   a) e.g. File - Print

2. Now select "ecoDMS" as printer.

3. The classification dialogue box opens.
   a) You can fill in the attributes either manually or automatically as a classification template.
   b) If ecoDMS recognises templates, the programme fills in the matching attributes and highlights them in green.

4. Archive the file with "OK" or cancel the process with "Cancel".
   a) You can also execute this step as "dark archiving process".

5. The file is stored in the PDF/A format and can be accessed via the table in ecoDMS.
   a) If more print functions are enabled, they are processed consecutively.
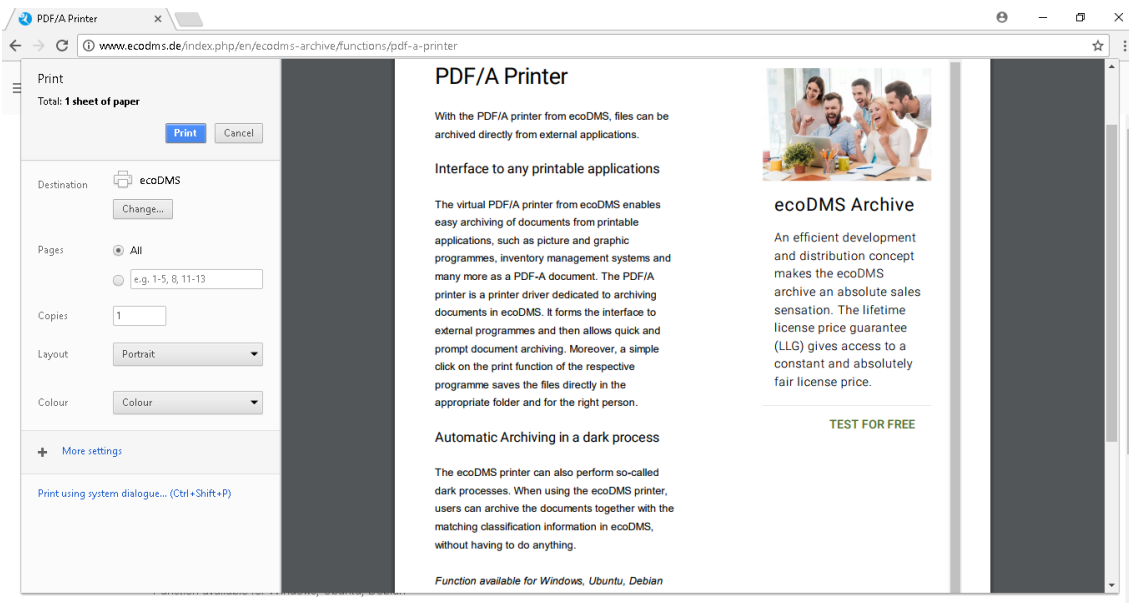
Figure 37.2: PDF/A Printer - Print function (here: Chrome web browser)
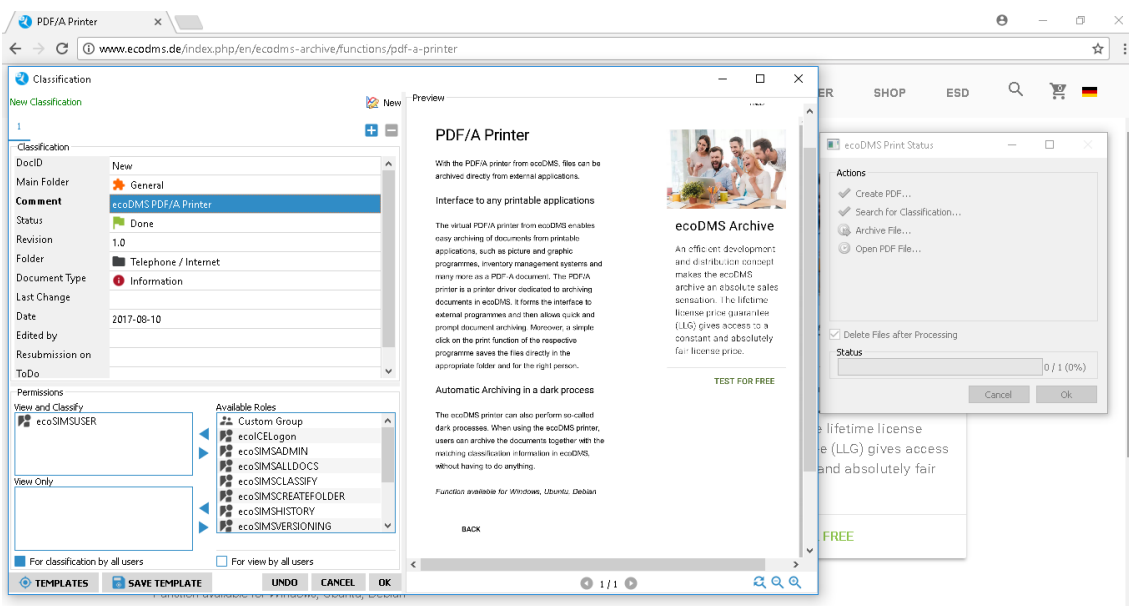
Figure 37.3: PDF/A Printer - Classify and archive file in ecoDMS (here: Chrome web browser)
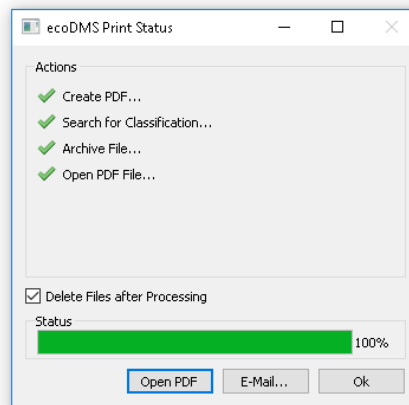
Figure 37.4: PDF/A Printer - Status window (example)

37.3 Dummy Text Recognition & Dark Process

The classification attributes and permissions of a classification template can be copied to the clipboard and pasted to any position. In this way you can save, for example, dummy text in documents that is recognised during archiving via the ecoDMS PDF/A Printer. The ecoDMS printer can also perform so-called dark processes. When using the ecoDMS printer, users can archive the documents together with the matching classification information in ecoDMS, without having to do anything.

– When pasting the template from the clipboard, ensure that the individual lines are not damaged by line breaks.

– To hide the code text during archiving, we recommend you select a white font, for example, on a white background.

– Moreover, you can perform automatic classification and archiving with dummy text (archiving in a dark process) [4, 1, 3].
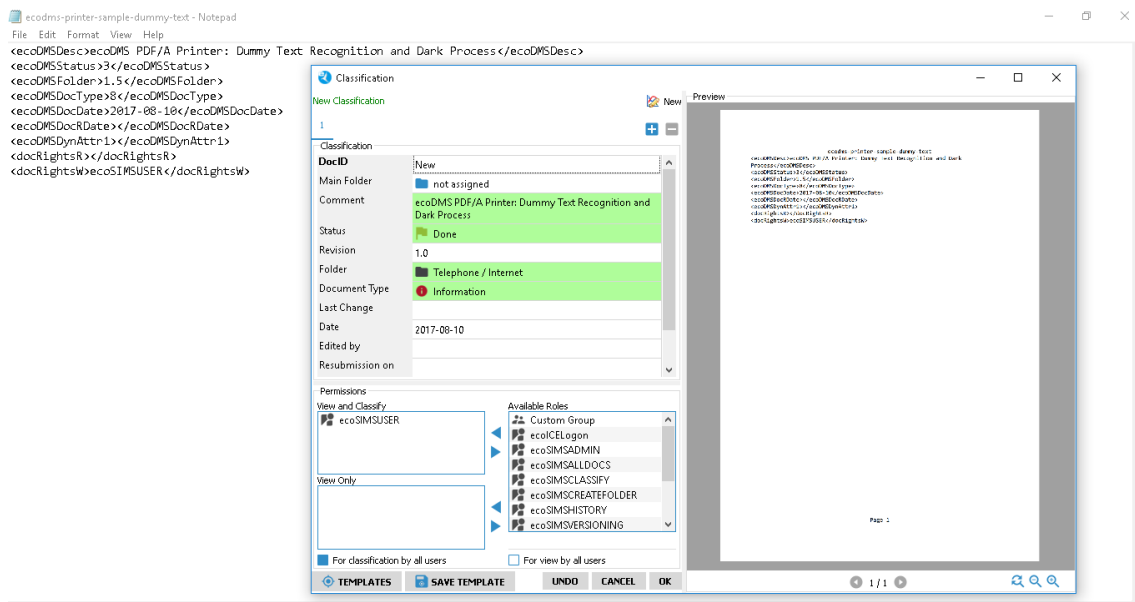
Figure 37.5: PDF/A Printer - Classify and archive file with dummy text (here: Notepad)

37.3.1 Copy Classification for Dummy Text

To copy a classification into the clipboard, complete the following steps:

1. Open the "classification dialogue box".

2. Enter the attributes and permissions in the classification dialogue box according to how they should be assigned during automatic recognition.

3. Right-click the "Permissions" area.

4. Click "Copy Classification to Clipboard".

5. Add any document to the clipboard.

   a) If you add the <ecoDMSForceArchive/> command to the entry, the document is classified in a dark process when using the PDF/A Printer. This command only works with the ecoDMS PDF/A Printer.

   b) In this case, the classification dialogue box does not open. The document is classified and deposited in ecoDMS.

Sample Code:

```
<ecoDMSDesc>This is a comment entry.</ecoDMSDesc>
<ecoDMSStatus>1</ecoDMSStatus>
<ecoDMSFolder>4.4</ecoDMSFolder>
<ecoDMSDocType>0</ecoDMSDocType>
<ecoDMSDocDate>2016-03-03</ecoDMSDocDate>
<ecoDMSDocRDate></ecoDMSDocRDate>
<ecoDMSDynAttr1>Payable</ecoDMSDynAttr1>
<ecoDMSDynAttr2>14785666</ecoDMSDynAttr2>
<ecoDMSDynAttr3>Sample Dummy Text</ecoDMSDynAttr3>
<docRightsR></docRightsR>
<docRightsW>ecoSIMSUSER</docRightsW>
```

37.3.2 Recognise Attributes via Dummy Text

A folder can automatically be entered for the classification via the ecoDMS folder key, which is for example the customer number. Therefore, the key only has to be entered in the Dummy Text. By archiving via the ecoDMS PDF/A Printer the folder is automatically be recognised and assigned in ecoDMS. This requires that the key is stored in the ecoDMS folder structure. The automatic assignment of a folder with the help of Dummy Text is available as follows:

```
<ecoDMSFolder>SEARCH;[KEY]</ecoDMSFolder>
```

Sample Folder with Key: 123456

```
<ecoDMSFolder>SEARCH;123456</ecoDMSFolder
```

37.3.3 Archive Using Dark Process

When using blind text, classification and archiving can proceed automatically. To do this, ecoDMS requires a specified additional instruction. The additional instruction prompts the system to execute the classification and archiving processes in the background. In this case the classification dialogue box is not displayed. The document is directly archived with the retrieved classification information when the ecoDMS PDF/A printer is executed.

   – **Attention! Note that the "Open File" function in the ecoDMS PDF/A printer settings is not enabled in this case (refer to the chapter "Setup PDF/A Printer (Windows)"**

1. Open the "classification dialogue box".

2. Enter the attributes and permissions in the classification dialogue box according to how they should be assigned during automatic recognition.

3. Right-click the "Permissions" area.

4. Click "Copy Classification to Clipboard".

5. Add any document to the clipboard.

6. Add the following command to the entry:

```
<ecoDMSForceArchive/>
```

    a) This command only works with the ecoDMS PDF/A Printer.

    b) In this case, the classification dialogue box does not open. The document is classified and deposited in ecoDMS.

Sample code included command to run in the dark process:

```
<ecoDMSDesc>This is a comment entry.</ecoDMSDesc>
<ecoDMSStatus>1</ecoDMSStatus>
<ecoDMSFolder>4.4</ecoDMSFolder>
<ecoDMSDocType>0</ecoDMSDocType>
<ecoDMSDocDate>2016-03-03</ecoDMSDocDate>
<ecoDMSDocRDate></ecoDMSDocRDate>
<ecoDMSDynAttr1>Payable</ecoDMSDynAttr1>
<ecoDMSDynAttr2>14785666</ecoDMSDynAttr2>
<ecoDMSDynAttr3>Sample Dummy Text</ecoDMSDynAttr3>
<docRightsR></docRightsR>
<docRightsW>ecoSIMSUSER</docRightsW>
<ecoDMSForceArchive/>
```

37.4 Call E-Mail Client with Dummy Text

Using dummy text, you can transfer documents to the email client and enter the addressee, the subject and the name of the attachment using parameters.
You can extend the dummy text with the following line:

```
<ecoMailSubject>Subject</ecoMailSubject>
<ecoMailTo>mail@addressee1.com</ecoMailTo>
<ecoMailCC>mail@addressee2.com</ecoMailCC>
<ecoMailBCC>mail@addressee3.com</ecoMailBCC>
<ecoMailAttachmentName>Attachment name.pdf</ecoMailAttachmentName>
```

– In the ecoDMS printer settings (ecoDMS manual "18.1 Setup PDF/A Printer (Windows)", both options "Search classification" and "Send file via email" must be enabled.

– When printing with the ecoDMS printer, the default email client opens. A ready-to-send email is displayed containing the values defined in the dummy text.

Important Information for Chapter 37

[1] *A document may only be classified if the user has a permission to classify the specified document.*

[2] *This function / component is not available for Linux Distributions.*

[3] *This function / component is not available for MacOS.*

[4] *Viewing and using this function requires specific system permissions.*

38 Libre- & OpenOffice Addon

The Libre- & OpenOffice Addon allows you to archive directly from LibreOffice and OpenOffice applications. The documents can be archived from Office in ecoDMS. They are then available as PDF/A document and also in the original format. If requested, the original file can be edited further and saved as a new version [4, 1, 3, 2].

38.1 Archive Office Files

To archive documents from LibreOffice or OpenOffice in ecoDMS, complete the following steps [4, 1, 3, 2]:

1. Create an Office file.

2. To archive the file, you have the following options:
    a) Click the "ecoDMS" button in the toolbar of your Office application or
    b) Select "ecoDMS -> Save to Archive" from the menu.

3. Archiving is prepared.
    a) This process can take a while.

4. The classification dialogue box opens.
    a) You can fill in the attributes either manually or automatically as a classification template.
    b) If ecoDMS recognises templates, the programme fills in the matching attributes and highlights them in green.
    c) Before archiving, please note the following settings:
        i. If you tick the "Finalise document" checkbox, you cannot make changes to the document after archiving. If you want to make changes, the document needs to be archived in ecoDMS as a new file.
        ii. If the "Finalise document" checkbox is NOT ticked, you can open, edit and archive the document as new Version afterwards via the version management.

5. Archive the file with "OK" or cancel the process with "Cancel".
    a) The file is stored in the PDF/A format and can be accessed via the table in ecoDMS.
    b) In addition, the original file is stored in the version management.

Figure 38.1: LibreOffice - Classify and archive document (here: Writer)
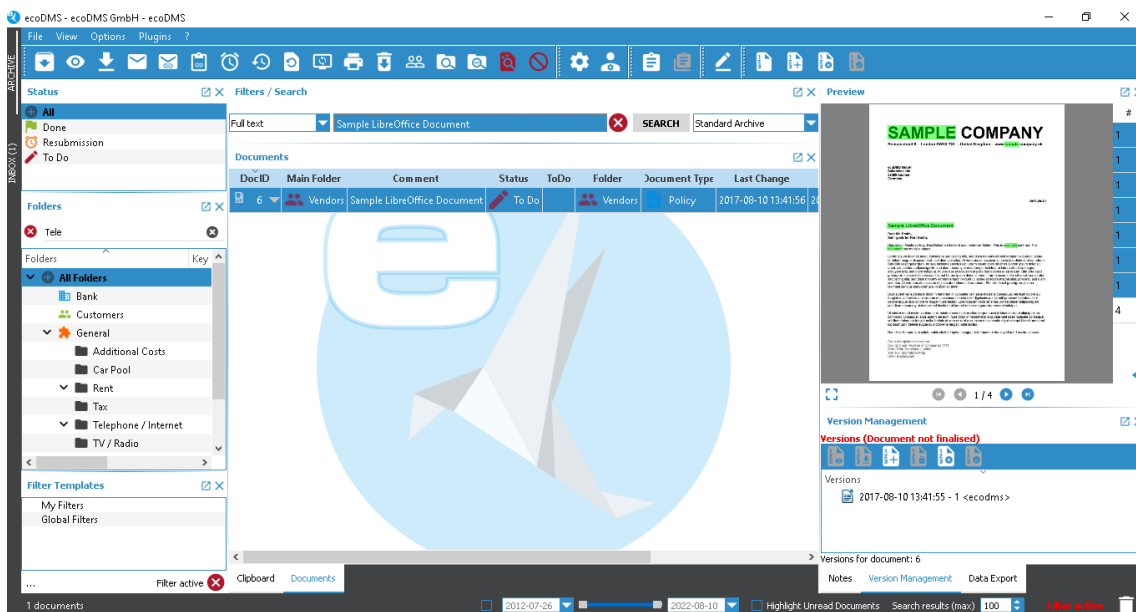
Figure 38.2: LibreOffice - Document with preview and version no 1 in ecoDMS

38.2 Edit File & Archive

With access to the version management, a user has always access to each version. Therefor the status of the version is irrelevant. Only the archiving of additional versions can be locked when a document is locked by a user, for example, or if the file has already been completed (finalised). The opening of the versions is always possible when the user has access to the version management. However, the editing of documents after opening depends on its status and file format [4, 1, 3, 2].
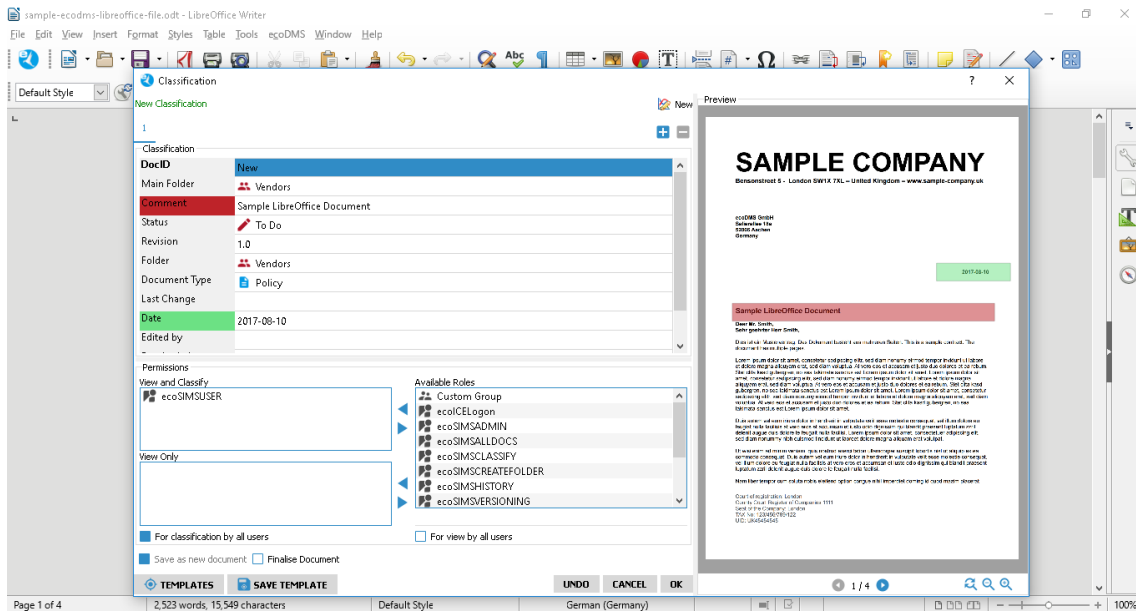
Figure 38.3: LibreOffice - Classify and archive document (here: Writer)
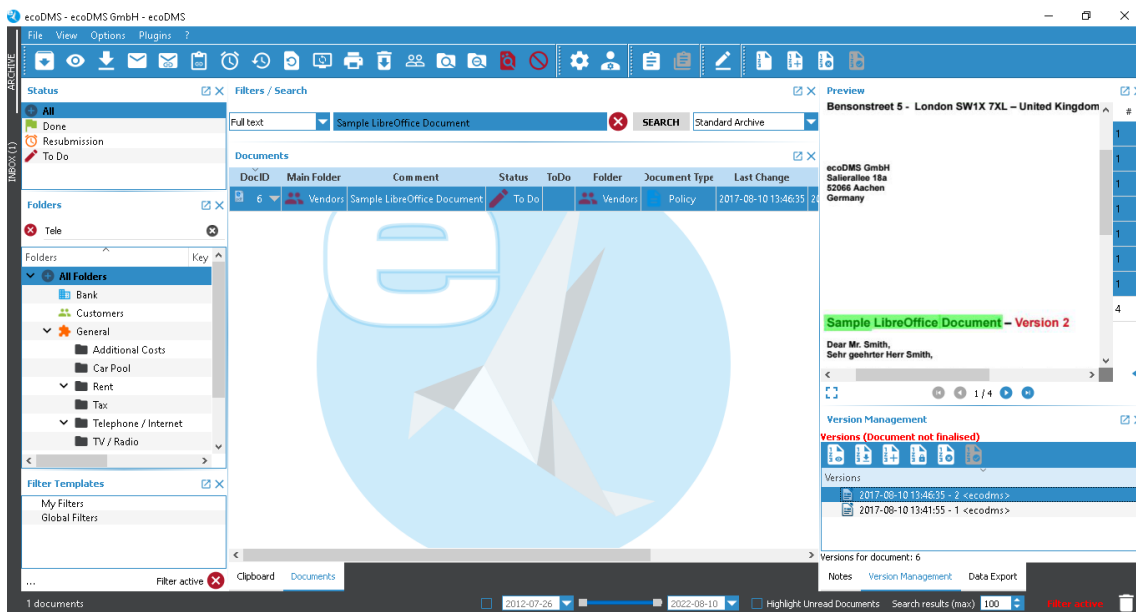
Figure 38.4: LibreOffice - Document with preview and version no 2 in ecoDMS

38.2.1 Edit File & Save as New Version

Documents archived via the Office Plugin (except for finalised documents) can be edited and archived as a new version [4, 1, 3, 2].

1. Open the required version for the Office file from the version management in the ecoDMS Client.

2. Make your changes in Office.

3. To save the changes you have the following options:
   a) Use the default-storage function of Office **or**
      i. The system recognises the access to the archive automatically when the file was opened from ecoDMS.
      ii. The "Save As..." function saves the file to the file system in the usual way.

b) Click the "ecoDMS-Button" in the toolbar of Office **or**

c) Select menu ecoDMS -> Save to Archive.

4. Archiving is prepared.

    a) This process can take a while.

5. The classification dialogue box opens.

    a) The information from the previous version is applied automatically.

    b) Before archiving, please note the following settings:

        i. If you tick the "Finalise document" checkbox, you cannot make changes to the document after archiving. If you want to make changes, the document needs to be archived in ecoDMS as a new file.

        ii. If the "Finalise document" checkbox is NOT ticked, you can open, edit and archive the document as new Version afterwards via the version management.

6. Archive the file with "OK" or cancel the process with "Cancel".

    a) The file is stored in the PDF/A format and can be accessed via the table in ecoDMS.

        i. The PDF/A of the previous version is overwritten with saving this version.

    b) In addition, the original file is stored in the version management as new version.

        i. Of course, all previous versions are retained and can be accessed via the version management.

38.2.2 Edit File & Save as New Document

Documents archived via the Office Plugin can be edited and archived as a new document [4, 1, 3, 2].

1. Open the required version for the Office file.

2. Make your changes in Office.

3. To save the changes you have the following options:

    a) Use the default-storage function of Office **or**

        i. The system recognises the access to the archive automatically when the file was opened from ecoDMS.

        ii. The "Save As..." function saves the file to the file system in the usual way.

    b) Click the "ecoDMS-Button" in the toolbar of Office **or**

    c) Select menu ecoDMS -> Save into Archive

4. Archiving is prepared.

    a) This process can take a while.

5. The classification dialogue box opens.

    a) The information from the previous version is applied automatically.

    b) Before archiving, please note the following settings:

        i. If you tick the "Finalise document" checkbox, you cannot make changes to the document after archiving. If you want to make changes, the document needs to be archived in ecoDMS as a new file.

        ii. If the "Finalise document" checkbox is NOT ticked, you can open, edit and archive the document as new Version afterwards via the version management.

        iii. If you tick the "Save as new document" checkbox, the file is not archived as a new document but as a new version in ecoDMS, and can then be reclassified accordingly. This function is ideal, for example, for creating templates.

            A. In this case ecoDMS applies any changes in the classification to the new document. The classification of the "original version" remains unchanged.

6. Archive the file with "OK" or cancel the process with "Cancel".

    a) The file is stored in the PDF/A format and can be accessed via the table in ecoDMS.

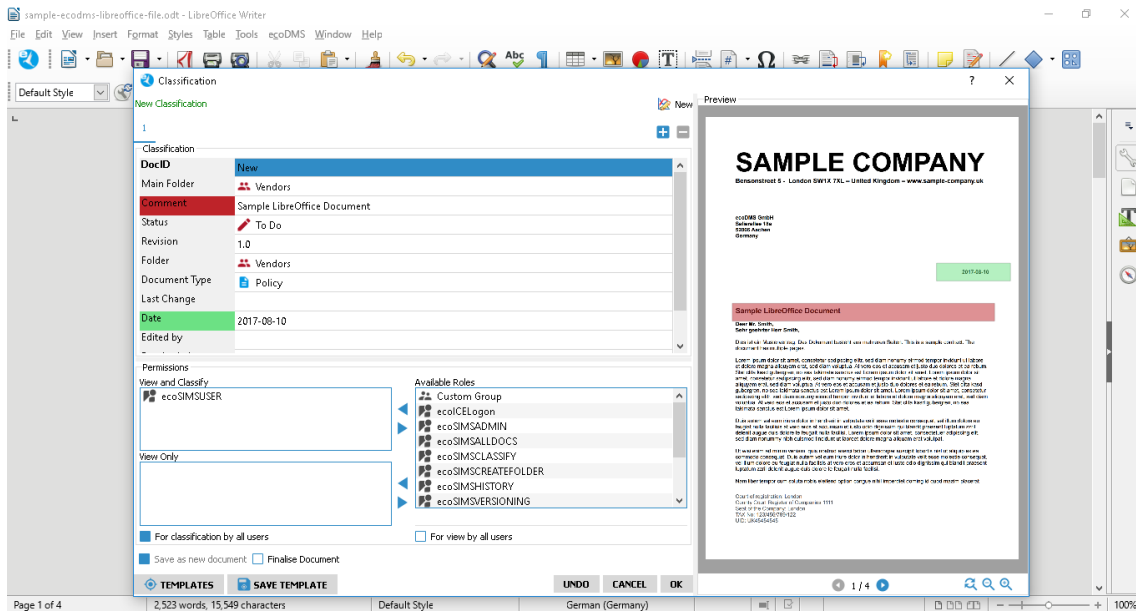   b) In addition, the original file is stored in the version management as version.

Important Information for Chapter 38

[1] *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.*

[2] *This feature requires a licence of the ecoDMS full version but can be tested during the time and is then automatically disabled until a full licence is activated.*

[3] *To use this ecoDMS component Java must be installed and activated in the Office application (Options -> Advanced -> Java options [enable]).*

[4] *Viewing and using this function requires specific system permissions.*

39 Microsoft Office Plugin

The MS Office Plugin allows you to archive directly from Microsoft Word, Excel, PowerPoint and Outlook under Windows. The documents can be archived from Office in ecoDMS. They are then available as PDF/A document and also in the original format. If requested, the original file can be edited further and saved as a new version [3, 1, 2].

39.1 Archive Office Files

To archive documents from MS Office in ecoDMS, complete the following steps [3, 1, 2]:

1. Create an Office file.

2. To archive the file, you have the following options:
   a) Click the "ecoDMS" button in the toolbar of your Office application or
   b) Select "ecoDMS -> Save to Archive" from the menu.

3. The system creates a PDF/A file.
   a) This process can take a while.

4. The classification dialogue box opens.
   a) You can fill in the attributes either manually or automatically as a classification template.
   b) If ecoDMS recognises templates, the programme fills in the matching attributes and highlights them in green.
   c) Before archiving, please note the following settings:
      i. If you tick the "Finalise document" checkbox, you cannot make changes to the document after archiving. If you want to make changes, the document needs to be archived in ecoDMS as a new file.
      ii. If the "Finalise document" checkbox is NOT ticked, you can open, edit and archive the document as new Version afterwards via the version management.

5. Archive the file with "OK" or cancel the process with "Cancel".
   a) The file is stored in the PDF/A format and can be accessed via the table in ecoDMS.
   b) In addition, the original file is stored in the version management.

Figure 39.1: Microsoft Office - Classify and archive document (here: Word)
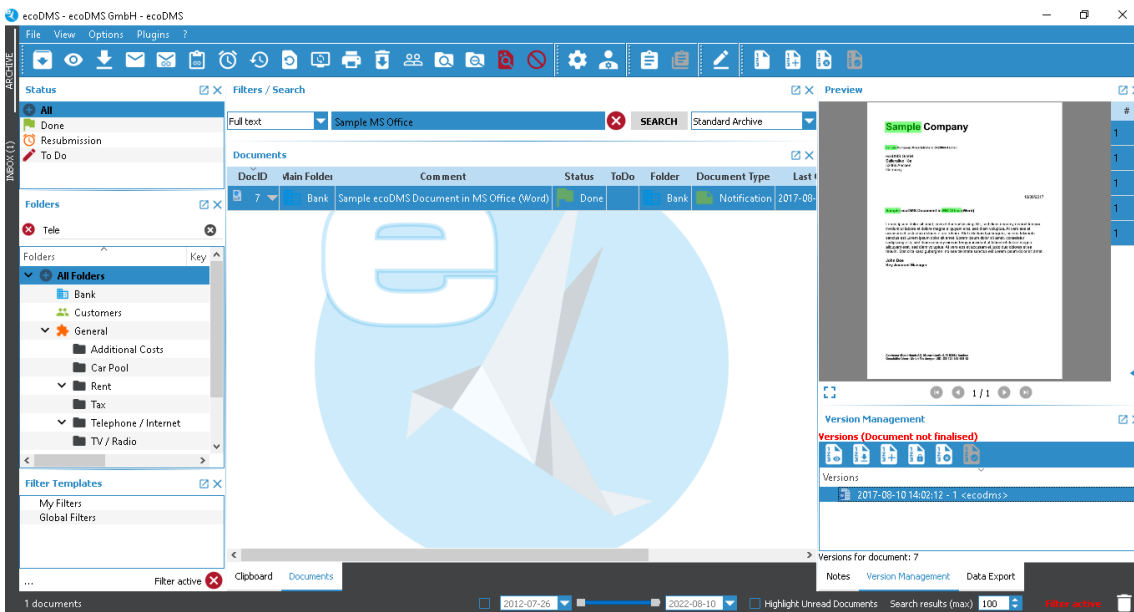
Figure 39.2: Microsoft Office - Document with preview and version no 1 in ecoDMS

39.2 Edit File and Archive New Version

With access to the version management, a user has always access to each version. Therefor the status of the version is irrelevant. Only the archiving of additional versions can be locked when a document is locked by a user, for example, or if the file has already been completed (finalised). The opening of the versions is always possible when the user has access to the version management. However, the editing of documents after opening depends on its status and file format. Documents archived via the Office Plugin (except for finalised documents) can be edited and archived as a new version.
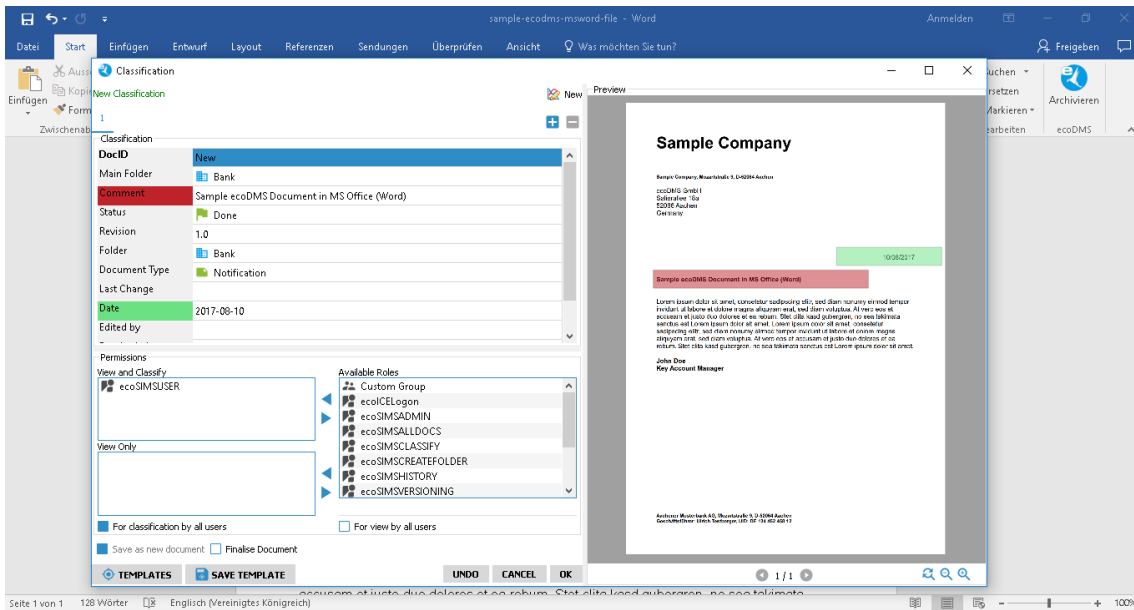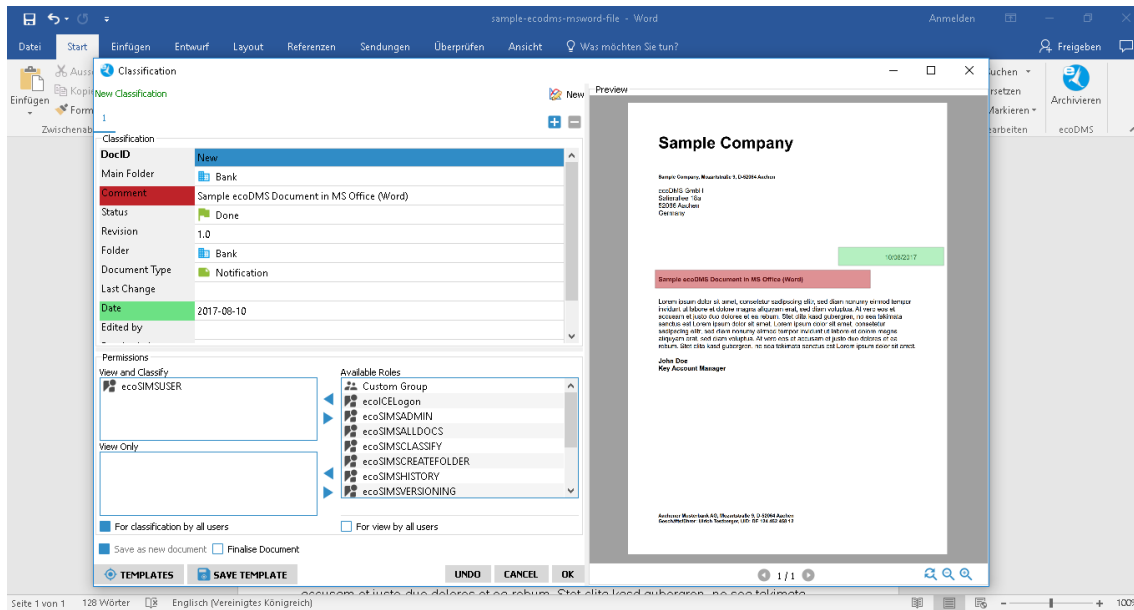
Figure 39.3: Microsoft Office - Classify and archive document (here: Word)
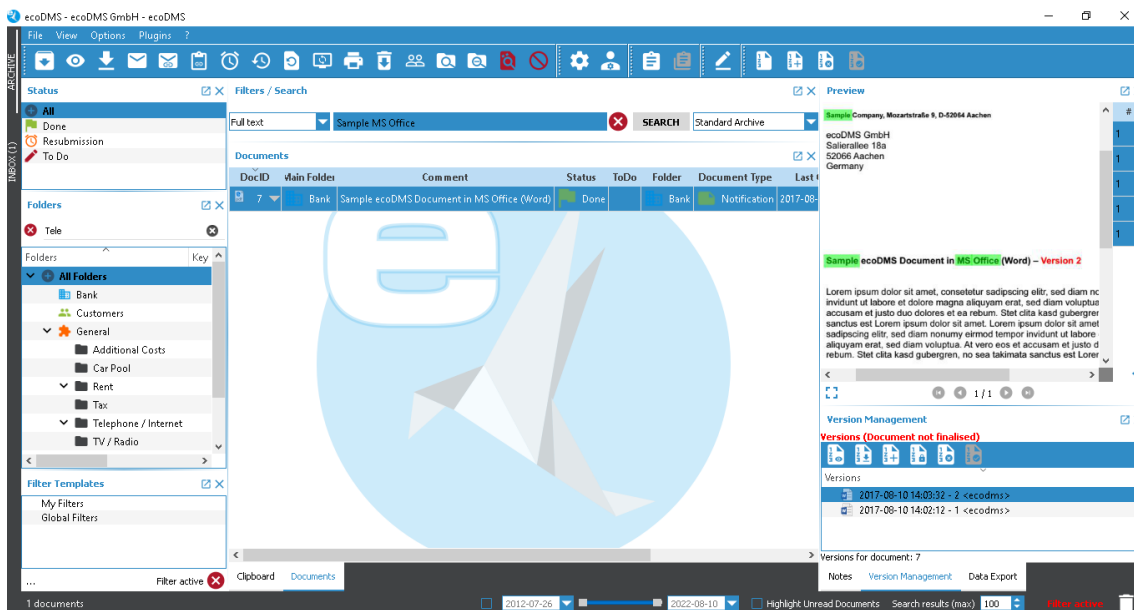
Figure 39.4: Microsoft Office - Document with preview and version no 2 in ecoDMS

39.2.1 Edit File & Save as New Version

Documents archived via the Office Plugin (except for finalised documents) can be edited and archived as a new version [3, 1, 2].

1. Open the required version for the Office file from the version management in the ecoDMS Client.

2. Make your changes in Office.

3. To save the changes you have the following options:
   a) Use the default-storage function of Office **or**
      i. The system recognises the access to the archive automatically when the file was opened from ecoDMS.
      ii. The "Save As..." function saves the file to the file system in the usual way.

b) Click the "ecoDMS-Button" in the toolbar of Office **or**

c) Select menu ecoDMS -> Save into Archive

4. The system creates a PDF/A file.

   a) This process can take a while.

5. The classification dialogue box opens.

   a) The information from the previous version is applied automatically.

   b) Before archiving, please note the following settings:

      i. If you tick the "Finalise document" checkbox, you cannot make changes to the document after archiving. If you want to make changes, the document needs to be archived in ecoDMS as a new file.

      ii. If the "Finalise document" checkbox is NOT ticked, you can open, edit and archive the document as new Version afterwards via the version management.

6. Archive the file with "OK" or cancel the process with "Cancel".

   a) The file is stored in the PDF/A format and can be accessed via the table in ecoDMS.

      i. The PDF/A of the previous version is overwritten with saving this version.

   b) In addition, the original file is stored in the version management as new version.

      i. Of course, all previous versions are retained and can be accessed via the version management.

39.2.2 Edit File & Save as New Document

Documents archived via the Office Plugin can be edited and archived as a new document [3, 1, 2].

1. Open the required version for the Office file from the version management in the ecoDMS Client.

2. Make your changes in Office.

3. To save the changes you have the following options:

   a) Use the default-storage function of Office **or**

      i. The system recognises the access to the archive automatically when the file was opened from ecoDMS.

      ii. The "Save As..." function saves the file to the file system in the usual way.

   b) Click the "ecoDMS-Button" in the toolbar of Office **or**

   c) Select menu "ecoDMS -> Save into Archive".

4. The system creates a PDF/A file.

   a) This process can take a while.

5. The classification dialogue box opens.

   a) The information from the previous version is applied automatically.

   b) Before archiving, please note the following settings:

      i. If you tick the "Finalise document" checkbox, you cannot make changes to the document after archiving. If you want to make changes, the document needs to be archived in ecoDMS as a new file.

      ii. If the "Finalise document" checkbox is NOT ticked, you can open, edit and archive the document as new Version afterwards via the version management.

      iii. If you tick the "Save as new document" checkbox, the file is not archived as a new document but as a new version in ecoDMS, and can then be reclassified accordingly. This function is ideal, for example, for creating templates.

         A. In this case ecoDMS applies any changes in the classification to the new document. The classification of the "original version" remains unchanged.

6. Archive the file with "OK" or cancel the process with "Cancel".

   a) The file is stored in the PDF/A format and can be accessed via the table in ecoDMS.

   b) In addition, the original file is stored in the version management as version.

Important Information for Chapter 39

[1]   *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.*

[2]   *This feature requires a licence of the ecoDMS full version but can be tested during the time and is then automatically disabled until a full licence is activated.*

[3]   *Viewing and using this function requires specific system permissions.*

40 Outlook Plugin

You can archive E-Mails from Windows Outlook via the MS Office Plugin. The user can decide which part of the email should be archived in the ecoDMS Archive. It is possible to archive E-Mails and their attachments [3, 1, 2].
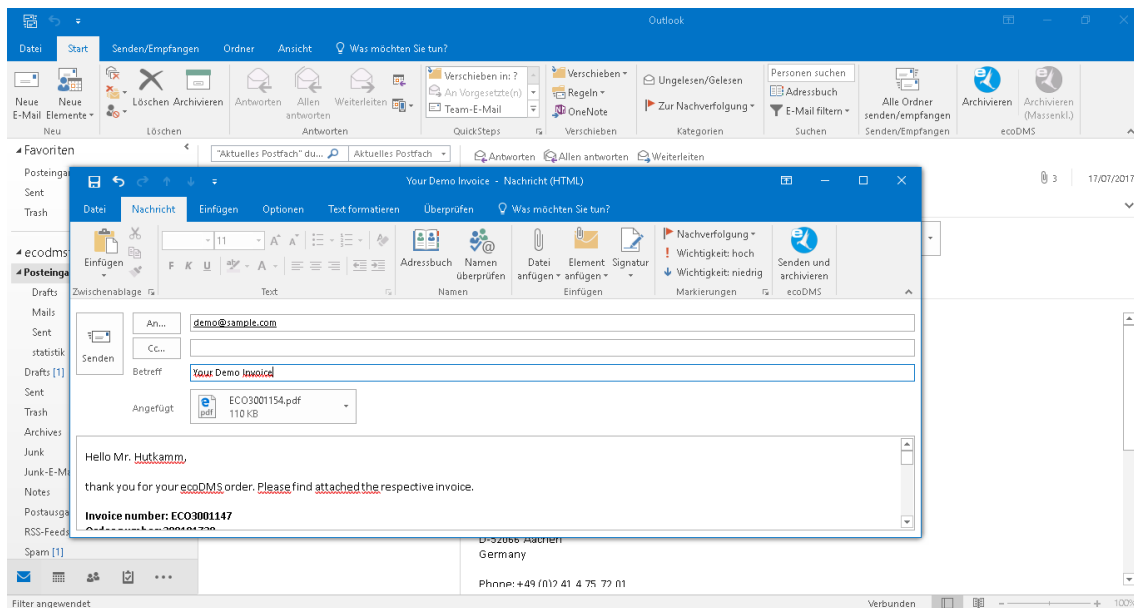

Figure 40.1: MS Office Plugin - Outlook

40.1 Basics

1. ecoDMS stores the complete email, including any attachments, in the standard mail format EML.

    a) Users with a permission can access this file through the version management function in the ecoDMS client.

2. In addition, the actual message (without attachment) is stored in the long-term archiving format PDF/A.

    a) The PDF/A can be retrieved and opened from the table in the document archive.

    b) Moreover, the PDF/A file of the email is displayed in the preview window of the archive.

3. Any existing email attachments are saved in the table under PDF/A in the "Attachments" area.

    a) The advantage for users is that an email and its attached files can be displayed and opened in sequence in the ecoDMS Archive table.

4. During the archiving process, ecoDMS Archive executes automatic full-text recognition.

    a) This allows the retrieval of email texts and readable attachments via the full-text search.

40.2 Send & Archive E-Mails

You can send outgoing emails to the recipient and archive them at the same time. [3, 1, 2].

1. Create an E-Mail in Outlook and, if required, add an attachment.

2. Now click the "Send and Archive" button.

3. the email is sent and prepared for archiving.

4. The classification dialogue box opens.
   a) You can fill in the attributes either manually or automatically as a classification template.
   b) If ecoDMS recognises templates, the programme fills in the matching attributes and highlights them in green.

5. Archive the email with OK or cancel the process with Cancel.
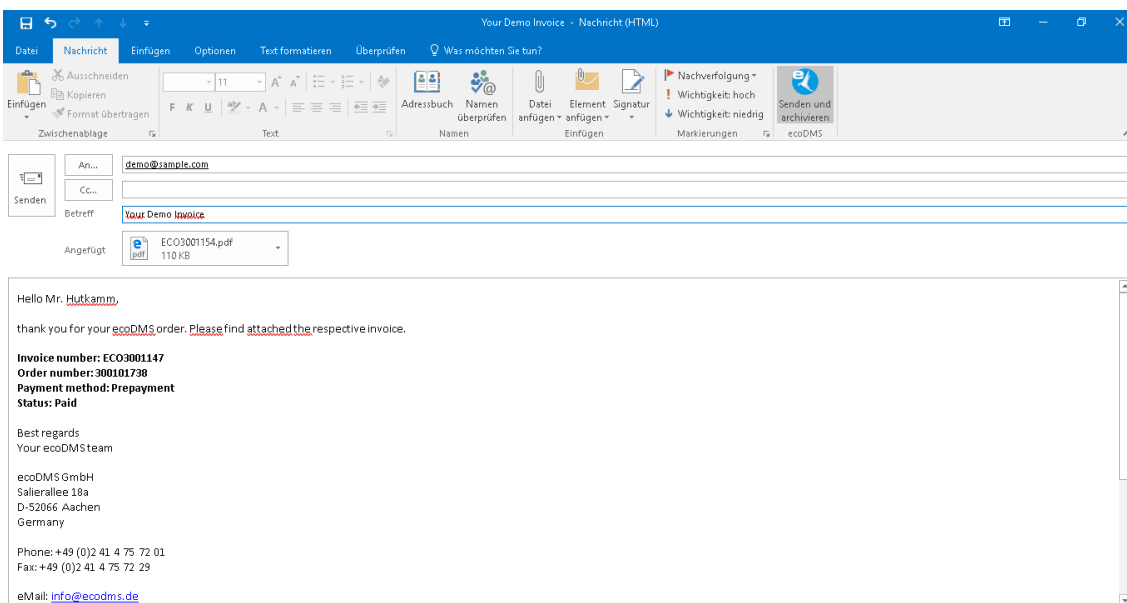
Figure 40.2: MS Office Plugin - Outlook - Send and archive email

40.3 Archive E-Mails & Attachments

To archive an email completely (including attachments), complete the following steps [3, 1, 2]:

1. Open the email in Outlook.
   a) Alternatively, just select the email.

2. Now click the ecoDMS Archive button.
   a) You can archive the entire E-Mail with attachments with this function.

3. The system creates a PDF/A file.
   a) This process can take a while.

4. The classification dialogue box opens.
   a) You can fill in the attributes either manually or automatically as a classification template.
   b) If ecoDMS recognises templates, the programme fills in the matching attributes and highlights them in green.

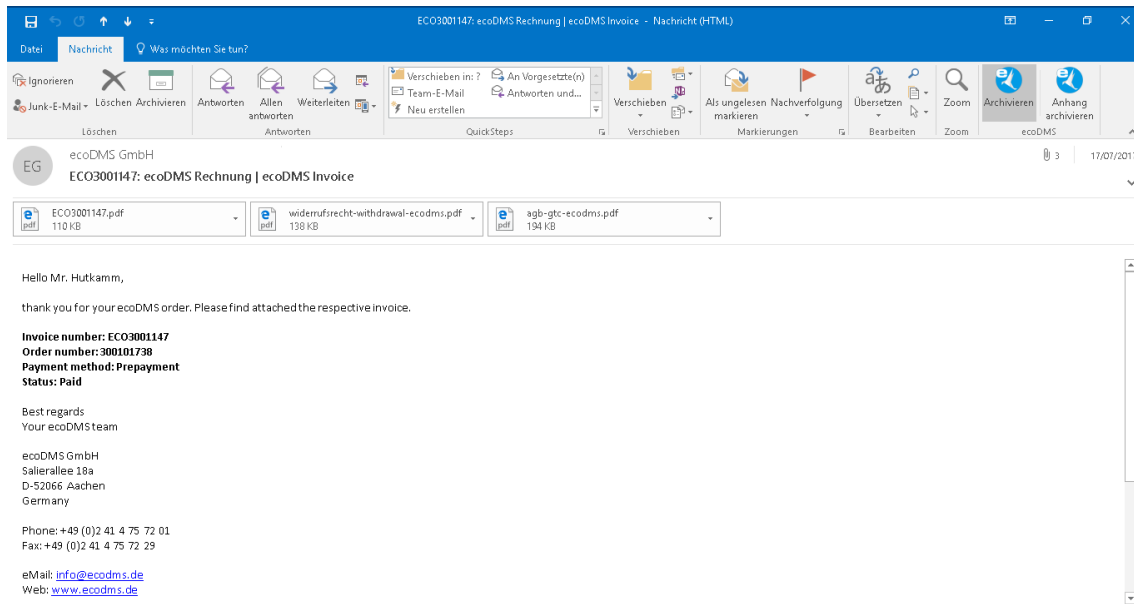5. Archive the email with OK or cancel the process with Cancel.

Figure 40.3: MS Office Plugin - Outlook - Archive an email completely

40.4 Archive Several E-Mails Consecutively

You can archive several emails consecutively. the emails are classified one after the other individually. To archive several emails consecutively, complete the following steps [3, 1, 2]:

1. Select the emails.

2. Click the button "Archive (ecoDMS)".

    a) This archives the entire emails with attachment(s).

3. Before archiving, a PDF/A file is created for each email.

    a) This process may take a while.

4. Classification then occurs consecutively for each email.

    a) Fill in the classification information as required.

5. Archive the emails by pressing OK or abort the process by pressing Cancel.

    a) Each email is saved individually to the archive.

40.5 Archive Several E-Mails Simultaneously (Mass Classify)

You can archive several emails simultaneously via the ecoDMS Office plugin. In this case all selected messages are subject to mass classification and all emails receive the same classification. To archive several emails simultaneously, complete the following steps [3, 1, 2]:

1. Select the emails.

2. Now click the "Archive (Mass Classify)" button.

    a) The complete E-Mails with attachment(s) are archived.

3. The system creates a PDF/A file before archiving.

    a) This process can take a while.

4. Classification is now executed as Mass classification.
    a) When mass classifying, you can classify several E-Mails simultaneously with the same information.
    b) When using the mass classify function, only fill in the boxes which you want to apply to all the documents you want to classify. All other classification attributes are not overwritten.

5. Archive the email with OK or cancel the process with Cancel.
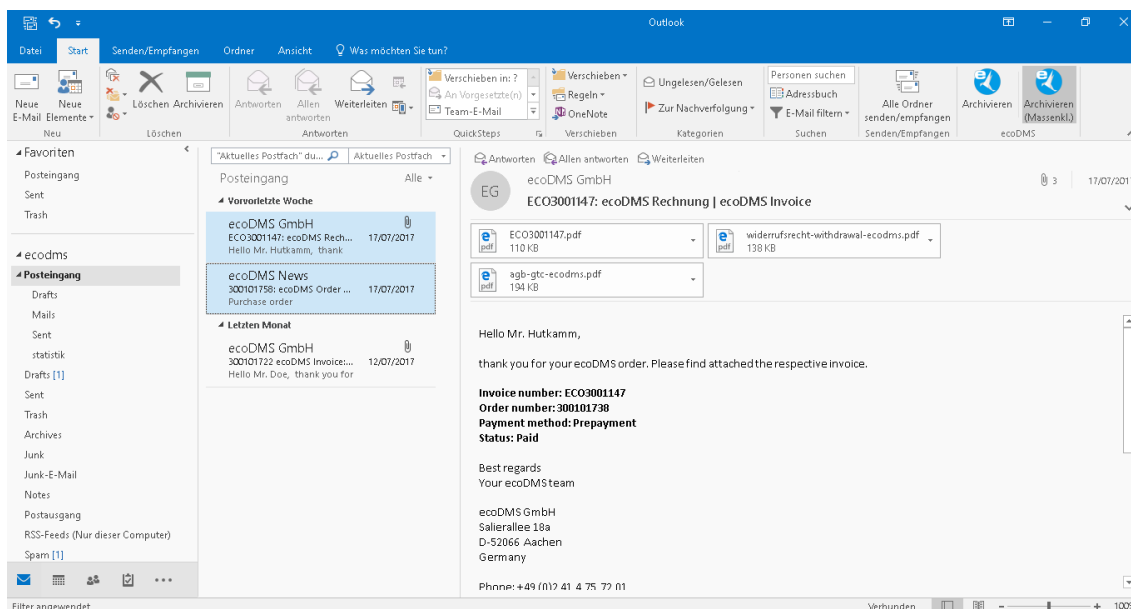   a) Each E-Mail is saved individually in the archive.

Figure 40.4: MS Office Plugin - Outlook - Archive several emails via mass classification

40.6 Archive E-Mail Attachments Only

You can archive email attachments independently from the associated email. The attachments can be classified individually one after the other. Alternatively, mass classification is possible for all selected attachments. In this case all files contain the same classification. If the files are readable, ecoDMS also performs full-text indexing during the archiving process. To archive email attachments, complete the following steps [3, 1, 2]:

1. Open the email in Outlook.

2. Now click the "Archive Attachment" button.

3. When archiving attachments, you can select which attachments you want to archive.
    a) If you enable mass classification, you can use a uniform classification for all selected attachments.
        i. When using the mass classify function, only fill in the boxes which you want to apply to all the documents you want to classify. All other classification attributes are not overwritten.
    b) Otherwise all selected attachments are classified one after the other.

4. The classification dialogue box opens. Enter archiving information here.
    a) You can fill in the attributes either manually or automatically as a classification template.
    b) If ecoDMS recognises templates, the programme fills in the matching attributes and highlights them in green.

5. Archive the Attachment(s) with OK or cancel the process with Cancel.
    a) Each attachment is saved as finalised file, individually in the original format in the archive.
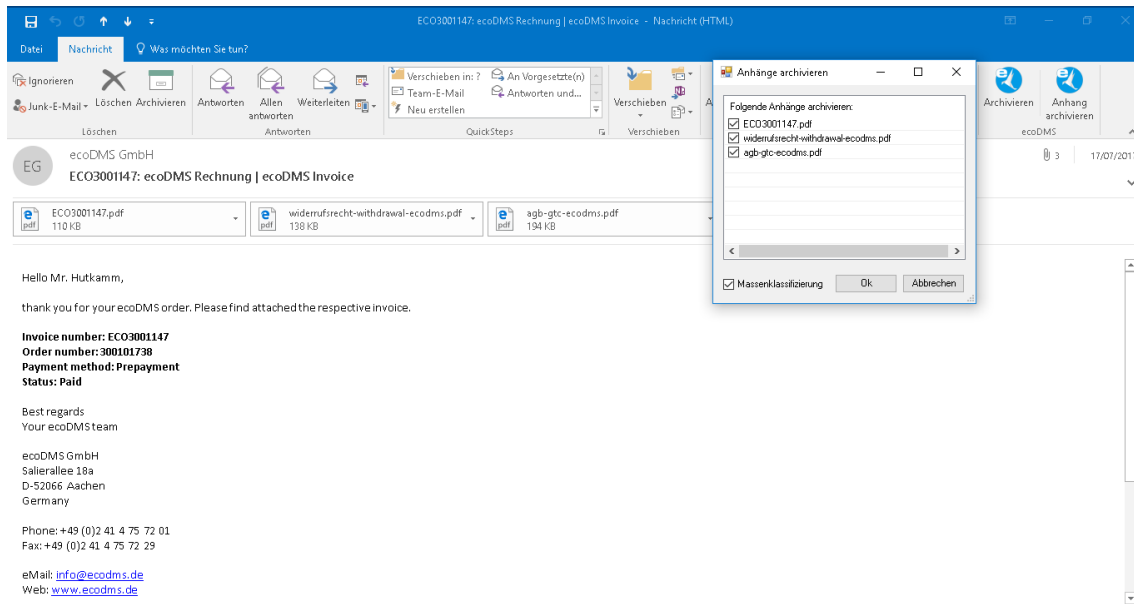
Figure 40.5: MS Office Plugin - Outlook - Archive email attachments

Important Information for Chapter 40

[1]   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.

[2]   This feature requires a licence of the ecoDMS full version but can be tested during the time and is then automatically disabled until a full licence is activated.

[3]   Viewing and using this function requires specific system permissions.

41 Thunderbird Addon

Use the ecoDMS Thunderbird Addon to archive E-Mails written or received in Thunderbird directly in ecoDMS. The user can decide which part of the email should be archived in the ecoDMS Archive. It is possible to archive E-Mails and their attachments [4, 2, 3, 1].

Information:

- No PDF/A files are generated via the ecoDMS Thunderbird Plugin for MacOS. Only the original E-Mail is deposited as an EML file. This is NOT an error in ecoDMS: https://bugzilla.mozilla.org/show_bug.cgi?id=675709

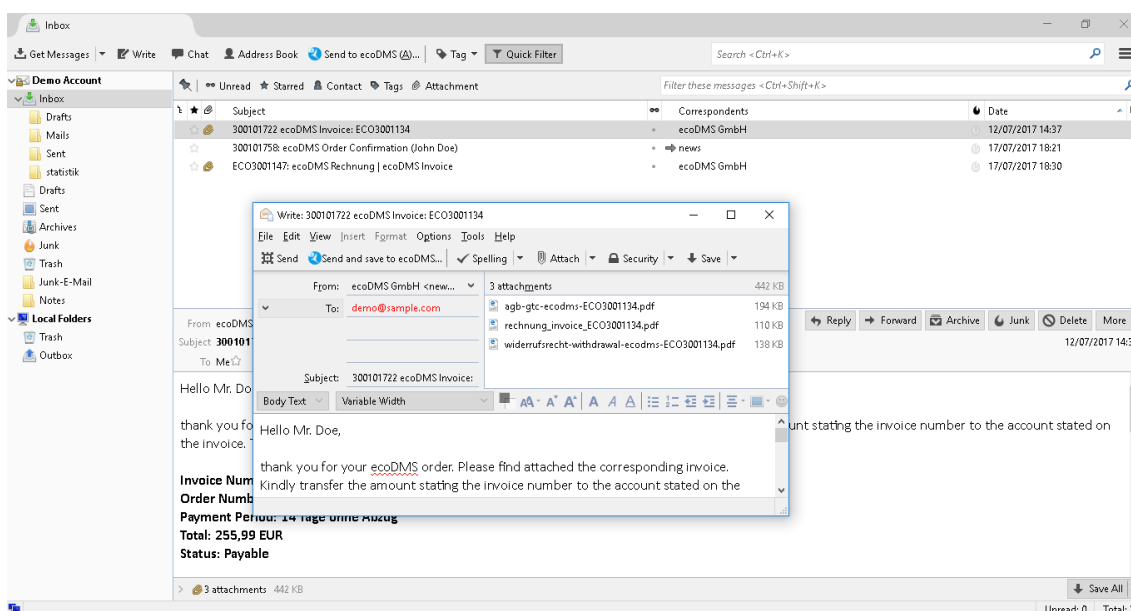- The Thunderbird add-on requires the latest version of the ecoDMS PDF/A printer.

Figure 41.1: Thunderbird Addon

41.1 Basics

1. ecoDMS stores the complete email, including any attachments, in the standard mail format EML.

    a) Users with a permission can access this file through the version management function in ecoDMS Client.

2. In addition, the actual message (without attachment) is stored as PDF.

    a) The PDF can be retrieved and opened from the table in the document archive.

    b) Moreover, the PDF file of the email is displayed in the Preview window of the archive.

3. Any existing email attachments are saved in the table under PDF in the "Attachments" area.

    a) The advantage for users is that an email and its attached files can be displayed and opened in sequence in ecoDMS Archive table.

4. During the archiving process, ecoDMS Archive executes automatic full-text recognition.

    a) This allows the retrieval of email texts and readable attachments via the full-text search.

41.2 Send & Archive E-Mails

You can send outgoing emails to the recipient and archive them at the same time. Complete the following steps [4, 2, 3]:

1. Create an E-Mail in Thunderbird and, if required, add an attachment.

2. Now click the "Send and Archive" button.

3. the email is sent and prepared for archiving.

4. The classification dialogue box opens.
    a) You can fill in the attributes either manually or automatically as a classification template.
    b) If ecoDMS recognises templates, the programme fills in the matching attributes and highlights them in green.

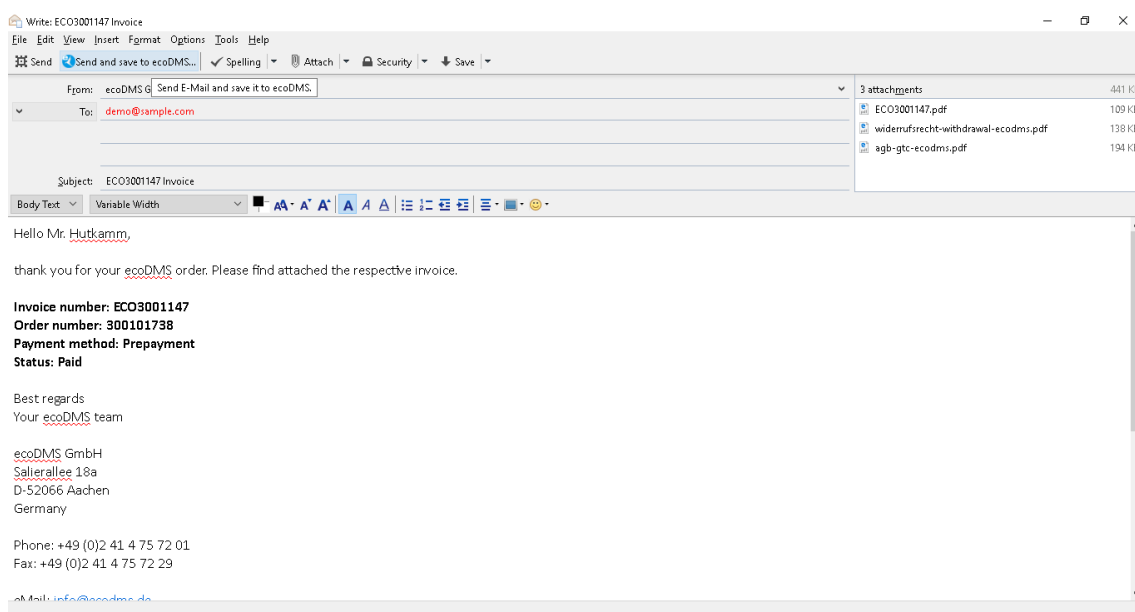5. Archive the email with OK or cancel the process with Cancel.

Figure 41.2: Thunderbird Addon - Send and Archive Email

41.3 Archive E-Mails & Attachments

To archive an email completely (including attachments), complete the following steps [4, 2, 3, 1]:

Information: No PDF/A files are generated via the ecoDMS Thunderbird Plugin for MacOS. Only the original E-Mail is deposited as an EML file. This is NOT an error in ecoDMS: https://bugzilla.mozilla.org/show_bug.cgi?id=675709

1. Open the email in Thunderbird.
    a) Alternatively, just select the email.

2. You can execute the archiving function in different ways:
    a) Click the "Archive (ecoDMS)..." button in Thunderbird
    b) Right click the email - "Archive (ecoDMS)"

3. Archiving is prepared.
    a) This process can take a while.

4. The classification dialogue box opens.

a) You can fill in the attributes either manually or automatically as a classification template.

b) If ecoDMS recognises templates, the programme fills in the matching attributes and highlights them in green.

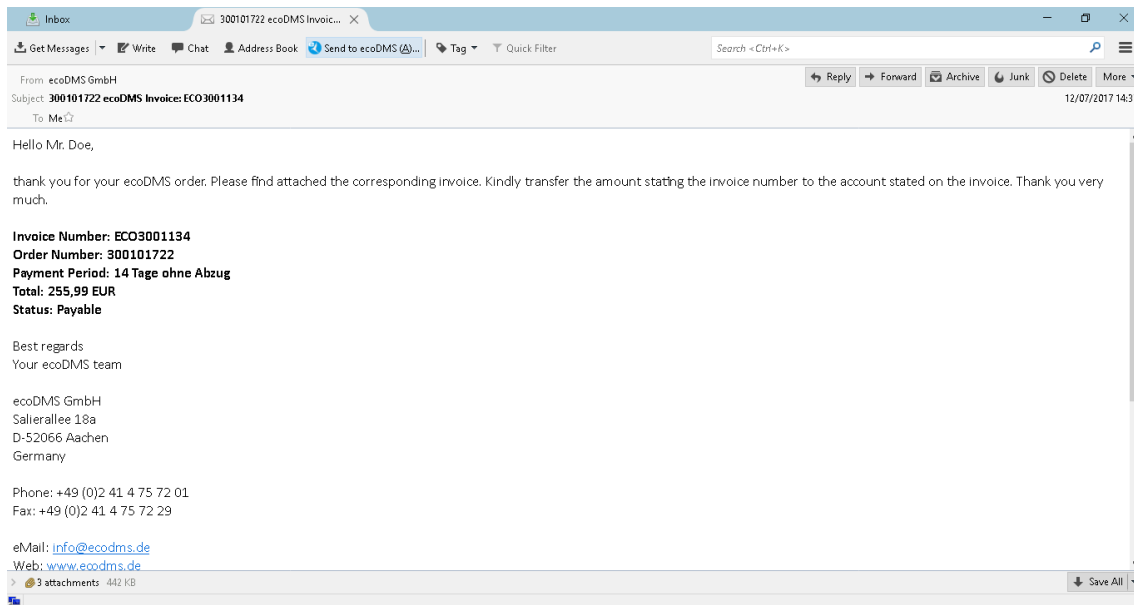5. Archive the email with "OK" or cancel the process with "Cancel".

Figure 41.3: Thunderbird Addon - Archive an email completely

41.4 Archive Several E-Mails Consecutively

To archive several emails consecutively, complete the following steps [4, 2, 3]:

1. Select the emails.

2. Click the button "Archive (ecoDMS)".

a) This archives the entire emails with attachment(s).

3. Before archiving, a PDF file is created for each email.

a) This process may take a while.

4. Classification then occurs consecutively for each email.

a) Fill in the classification information as required.

5. Archive the emails by pressing "OK" or abort the process by pressing "Cancel".

a) Each email is saved individually to the archive.

41.5 Archive E-Mail Attachments Only (All)

You can archive all email attachments independently from the associated email. The attachments are classified consecutively and individually. If the files are readable, ecoDMS also performs full-text indexing during the archiving process. To archive all email attachments, complete the following steps [4, 2, 3, 1]:

1. Open the email in Thunderbird.

a) Alternatively, just select the email.

2. In the email, click the attachments area, which displays the number of attachments.

3. Right click the mouse and select "Archive Attachments (ecoDMS)...".

4. Archiving is prepared.

   a) This process may take a while.

5. The classification dialogue box opens for each attachment in sequence. Enter archiving information here.

   a) You can fill in the attributes either manually or automatically as a classification template.

   b) If ecoDMS recognises a template, the programme fills in the matching attributes and highlights them in green.

6. Archive the attachment(s) by pressing "OK" or abort the process by pressing "Cancel".

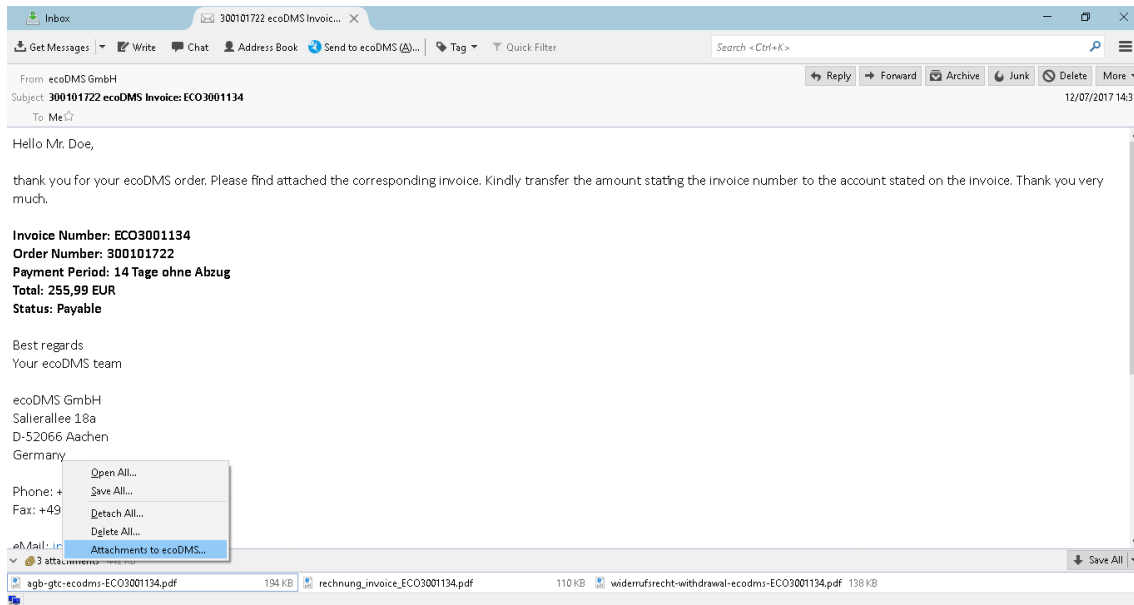   a) Each attachment is saved individually in the archive as a closed file in the original format.

Figure 41.4: Thunderbird Addon - Archive all email attachments

41.6 Archive E-Mail Attachments Only (Individually)

You can archive single email attachments independently from the associated email. If the files are readable, ecoDMS also performs full-text indexing during the archiving process. To archive individual email attachments, complete the following steps [4, 2, 3, 1]:

1. Open the email in Thunderbird.

   a) Alternatively, just select the email.

2. Select the email attachment.

3. Right-click the attachment - "Archive Attachment (ecoDMS)".

4. Archiving is prepared.

   a) This process can take a while.

5. The classification dialogue box opens. Enter archiving information here.

   a) You can fill in the attributes either manually or automatically as a classification template.

   b) If ecoDMS recognises templates, the programme fills in the matching attributes and highlights them in green.

6. Archive the Attachment with "OK" or cancel the process with "Cancel".

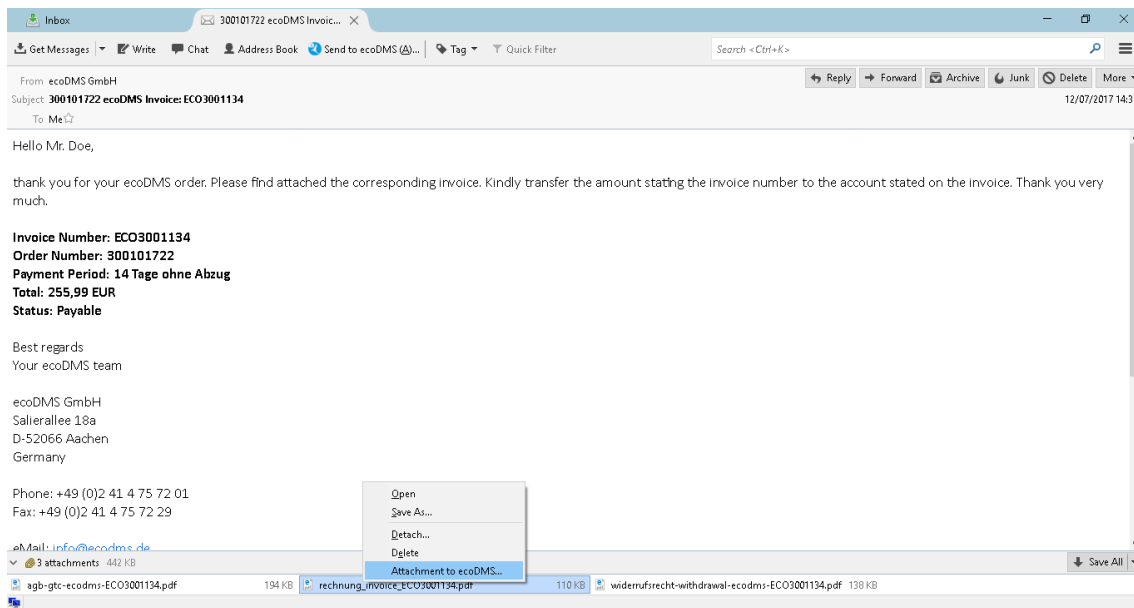   a) The attachment is saved as finalised file in the original format in the archive.

Figure 41.5: Thunderbird Addon - Archive single email attachment

Important Information for Chapter 41

[1] No PDF/A files are generated via the ecoDMS Thunderbird Plugin for MacOS. Only the original E-Mail is deposited as an EML file. This is not an error in ecoDMS-.

[2] 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.

[3] This feature requires a licence of the ecoDMS full version but can be tested during the time and is then automatically disabled until a full licence is activated.

[4] Viewing and using this function requires specific system permissions.

42 Workflow

As a standard, ecoDMS has an ad-hoc workflow function which allows the mapping of specific processes in a manual, status and user-based workflow. Depending on status, user action and permission, the archived file can be processed by the person or group responsible according to the parameters stored in the system. All classification attributes can be configured in the settings dialogue box of ecoDMS to suit the needs of your company and can be changed or enhanced at any time. The ad-hoc workflow is then executed via the classification dialogue box [2, 1].

42.1 Ad-hoc Workflow (Example)

This example explains more about the ad-hoc workflow:

42.1.1 Preparation

First of all, setup ecoDMS according to your requirements (document types, folder structures, etc.). Take care to use a flat and simple structure (see ecoDMS manual). In addition to the standard attributes, you should create a user-defined attribute "ToDo" for our example workflow. To do this, create a new combo box and assign the matching values, e.g. "For payment", "For Review", "Cancel", etc. Moreover, we recommend you assign a role (user group) to each "work group" (department) in the company. This allows you, for example, to assign a common role (user group) to staff from the accounting department. The same applies to management, technical department, sales and all other departments and groups in a company [2, 1].

42.1.2 Situation

An incoming invoice over the purchase of new PC hardware is forwarded from the mail room to management for review. Then management forwards the document to the bookkeeping department for payment. Finally, the technical department can view the document and receives a note that the process is completed.

42.1.3 Ad-hoc Workflow

1. Step: The document is scanned by the mail room, retrieved via Inbox and classified as follows:
   a) Folder: Suppliers
   b) Document type: Incoming invoice
   c) Status: In work
   d) ToDo: Review
   e) View and classify: Management
      i. After archiving the document is only visible for management and released for further classification.

2. Step: After review, the document is forwarded to the bookkeeping department. Management needs to change the classification as follows:
   a) Status: In work
   b) ToDo: For payment
   c) View and classify: Bookkeeping
   d) View only: Management
      i. After saving, the document is only visible and classifiable by the bookkeeping department. Management retains the permission to view the documents and the classification.

3. Step: The bookkeeping department carries out the bank transfer and ends the process by additionally releasing the document for the technical department. The classification is modified as follows:

       a) Status: Done

       b) ToDo: -

       c) View and classify: Bookkeeping

       d) View only: Management, Technical department

           i. After saving, the document continues to be visible and classifiable for the bookkeeping department. Management and technical department have the right to view the document and the classification.

Important Information for Chapter 42

[1]   *A document may only be classified if the user has a permission to classify the specified document.*

[2]   *Viewing and using this function requires specific system permissions.*

  – ecoDMS Server

You can stop and restart your ecoDMS Server if necessary. This chapter describes the processes.

43 Login Credentials

This chapter contains information about the initial login credentials for ecoDMS Archive.

43.1 Default User

The default user is created automatically when you first install ecoDMS. This user can scan, archive and classify, use version management and has access to the history. Moreover, the default user has admin permissions and thus has the permission to make system settings and add more users.

The login credentials for the default user (if the password has not been changed) are:

– User name: ecodms

– Password: ecodms

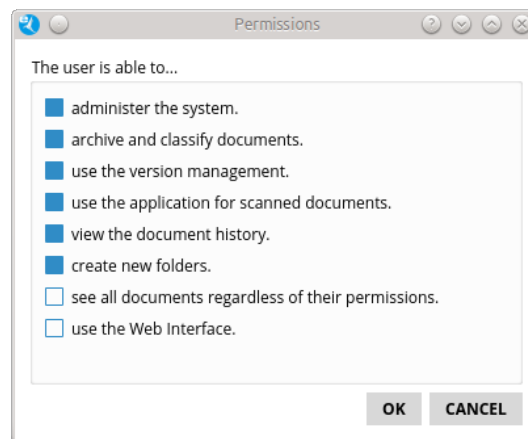For security reasons, this password should be changed immediately after login.

Figure 43.1: Permission Default User

43.2 System Administrator

Besides the automatically generated user (default user) there is also a so-called system administrator. This user is for system configuration only. The system administrator thus has the permission to make system settings and add more users. This user is not able to archive, view and/or classify documents.

– User name: ecoSIMSAdmin

– Password: ecoSIMSAdmin

For security reasons, this password should be changed immediately after login.

43.3 PostgreSQL Database

If postgreSQL is installed over the ecoDMS installer, the following user information is used for the database:

- User name: postgres

- Password: postgres

If there is already a matching postgreSQL version available because, for example, the database was installed manually, the login credentials that was assigned during the installation of postgreSQL applies.

43.4 Scaninput Folder (Linux Distributions)

The scaninput folder is a Samba share. When installing ecoDMS Server on a Linux distribution, a default user is created to do so. As an option, you can also enter any other user created in the Linux system. Use the following login credentials for the default user:

- User name: dmsscanner

- Password: dmsscanner