



ecoDMS Version 18.09 (apu)

Installation



Imprint

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Author / Originator: ecoDMS GmbH
©2022 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.-Betw. Michael Schmitz
Helge Lühmann

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1 System Requirements

Please refer to the official system requirements for the respective ecoDMS component before each installation. If your system does not meet these requirements, we cannot guarantee the smooth and stable operation of our software. For the system requirements of ecoDMS Version 18.09 (apu), please refer to the official ecoDMS website at the following link:

<https://www.ecodms.de/index.php/en/ecodms-archive/system-requirements/ecodms-version-18-09-apu>

2 Windows

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

2.1 Upgrade Notes

If your installation is an upgrade, please note the following information:

- Before upgrading, you must create a full and clean backup.
- You must always upgrade all ecoDMS components to the latest version.
- Disable your antivirus software during the ecoDMS Server installation.
 - Then add the data folder you select during the installation to the exclusions list in your antivirus software.
- **Notes on the database:**
 - When updating from ecoDMS version 14.08 or 16.09 to 18.09, postgresSQL is upgraded to version 10.
 - If you installed the ecoDMS database manually, a direct upgrade is not possible. Proceed as follows in this case:
 1. Create a complete and clean data backup.
 2. Uninstall all ecoDMS components completely.
 3. Restart your computer.
 4. Install the new version with all necessary components.
 5. Install the data backup.
- **Archives:** If ecoDMS is installed from scratch (not as upgrade) or if there is only one archive in the version that is upgraded, the settings do not include the "Archive" option. If the upgrade installation has at least 2 archives, the settings include the "Archive" option.
- **When using synchronisation services / cloud services, always ensure that the ecoDMS folders are excluded. Otherwise this may lead to errors in the data folders / containers.**

2.2 Installation

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

2.2.1 AllinOne Installation

Use this installation file to execute all necessary base components in sequence within one installation. The package includes the ecoDMS Server with postgresSQL database & container storage system, the ecoDMS Client including Inbox & Connection Manager and the PDF/A Printer from ecoDMS. If all ecoDMS components of the installation have been installed on a workstation, an ecoDMS profile will already exist in the Connection Manager for this workstation. Please refer to the chapter "Access Data" in the ecoDMS manual for the login credentials for the default profile [7, 1, 2, 4, 3, 6].

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

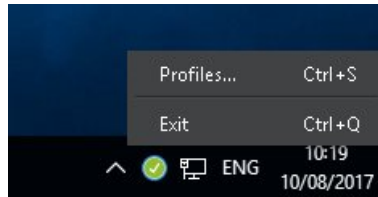


Figure 2.1: Exit Connection Manager

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

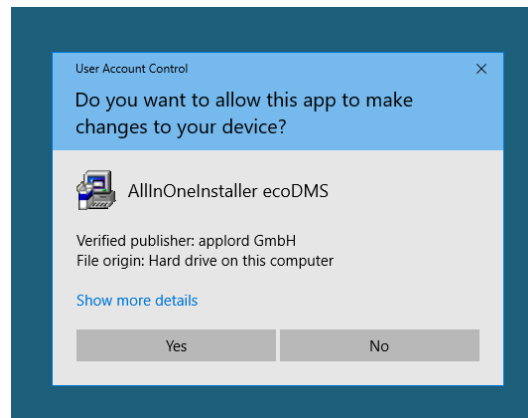


Figure 2.2: AllinOneInstaller: Windows Confirmation Prompt

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

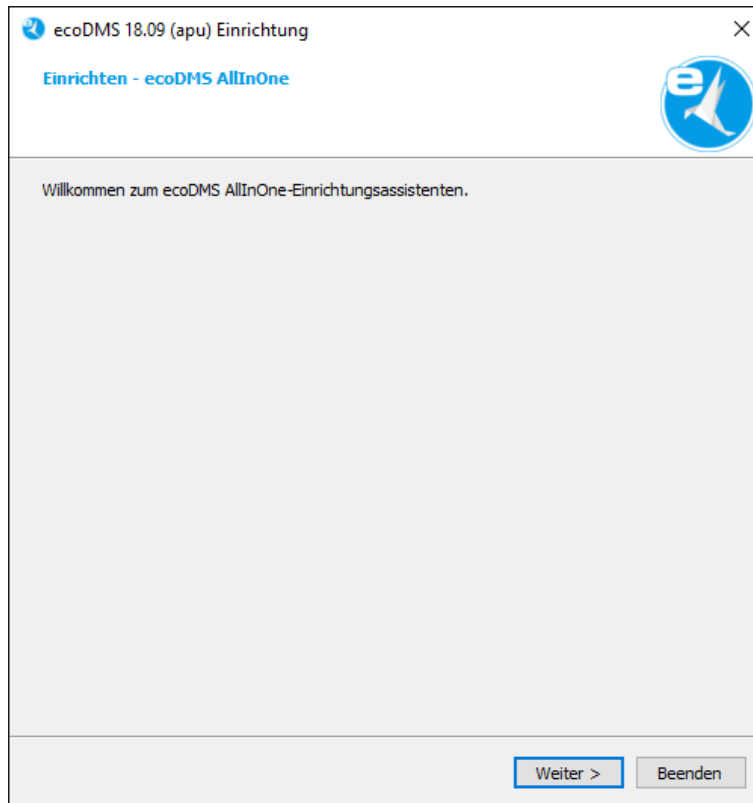


Figure 2.3: AllinOneInstaller: Welcome Screen (Windows)

7. Select the required components you want to install and click the associated language. Click "Next" to continue.
 - a) If you are installing an update, the existing components are selected and cannot be modified.

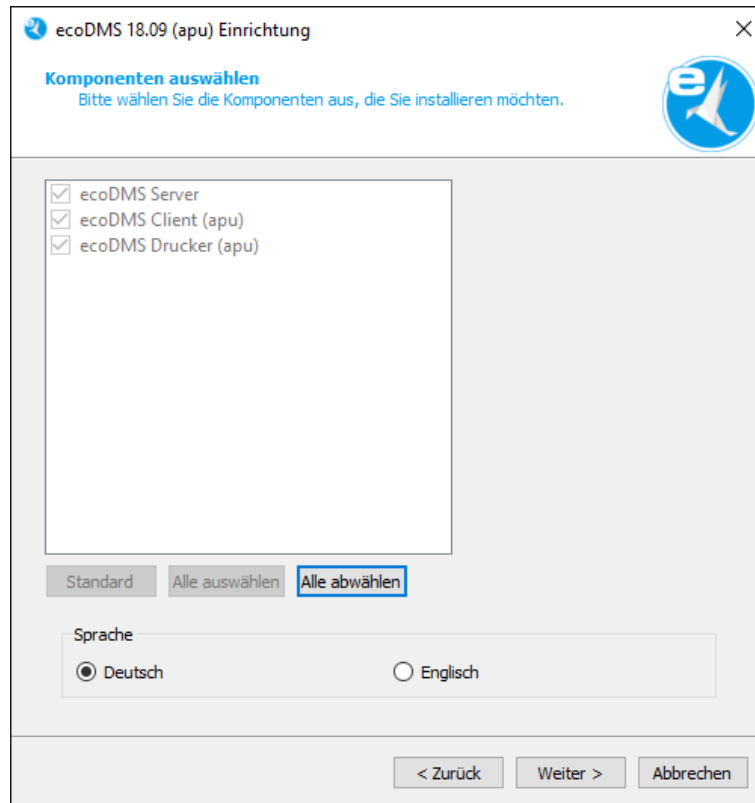


Figure 2.4: AllinOneInstaller: Components and Language Selection (Windows)

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

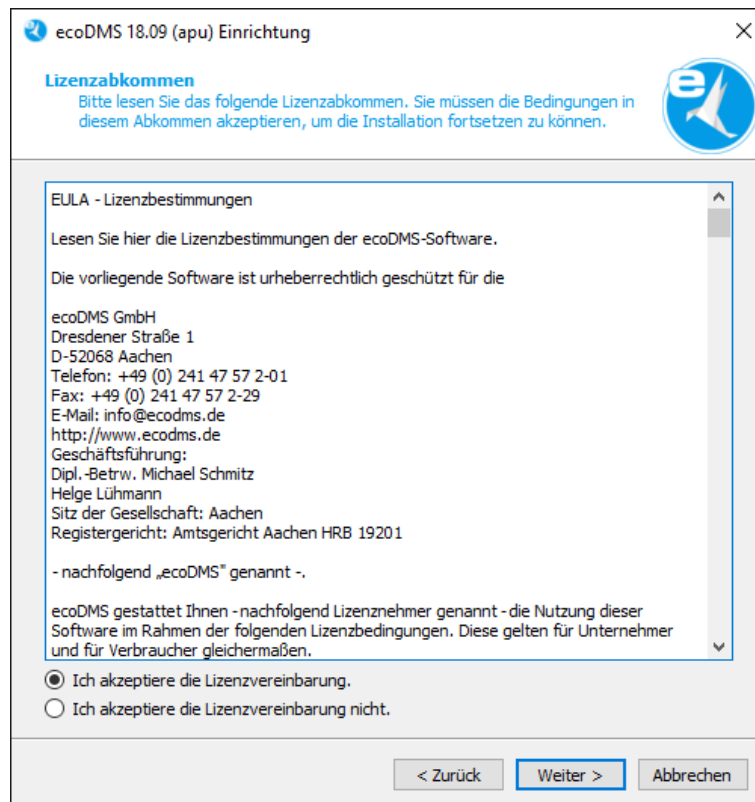


Figure 2.5: AllinOneInstaller: License Agreement (Windows)

9. The setup program is now ready to install the individual components on your computer. The required disk space for the installation will be displayed. Click "Install" to start the installation process.

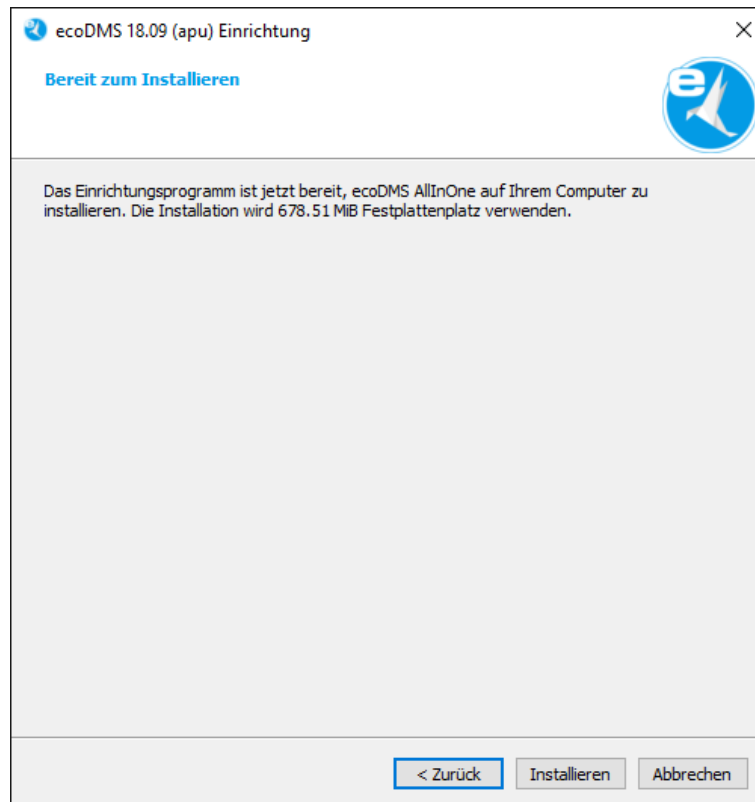


Figure 2.6: AllInOneInstaller: Start the installation process (Windows)

10. The installation starts. The AllInOne-Installer consecutively executes the installation of the components. This process may take a while.
- a) Depending on your selection, the following components are installed:
 - i. ecoDMS Server incl. postgresSQL & Microsoft Visual C++
 - ii. ecoDMS Client
 - iii. ecoDMS PDF/A-Printer

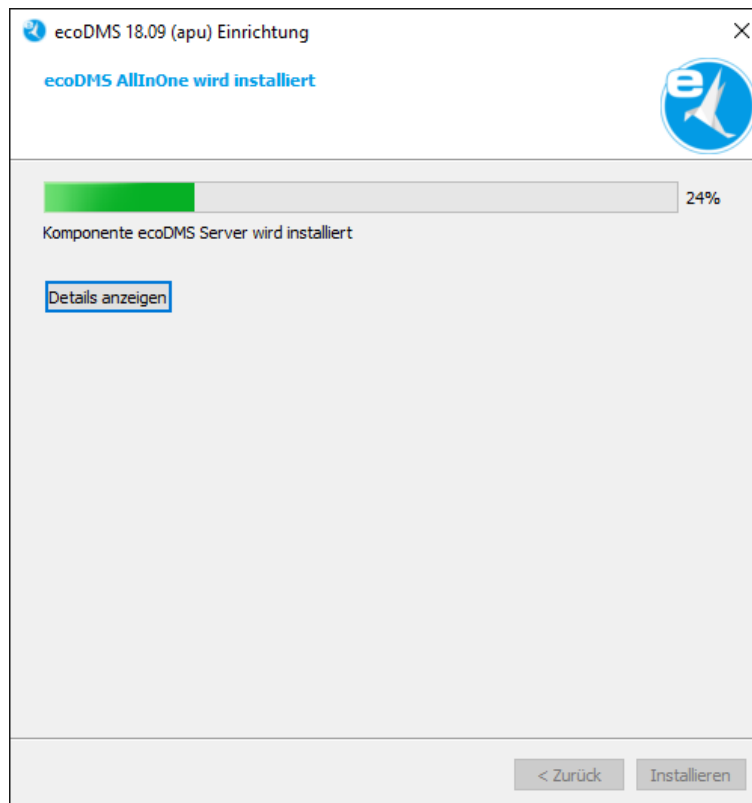


Figure 2.7: AllInOneInstaller: Installing the individual components (Windows)

11. As soon as all components have been installed, click "Finish" to close the AllInOneInstaller.

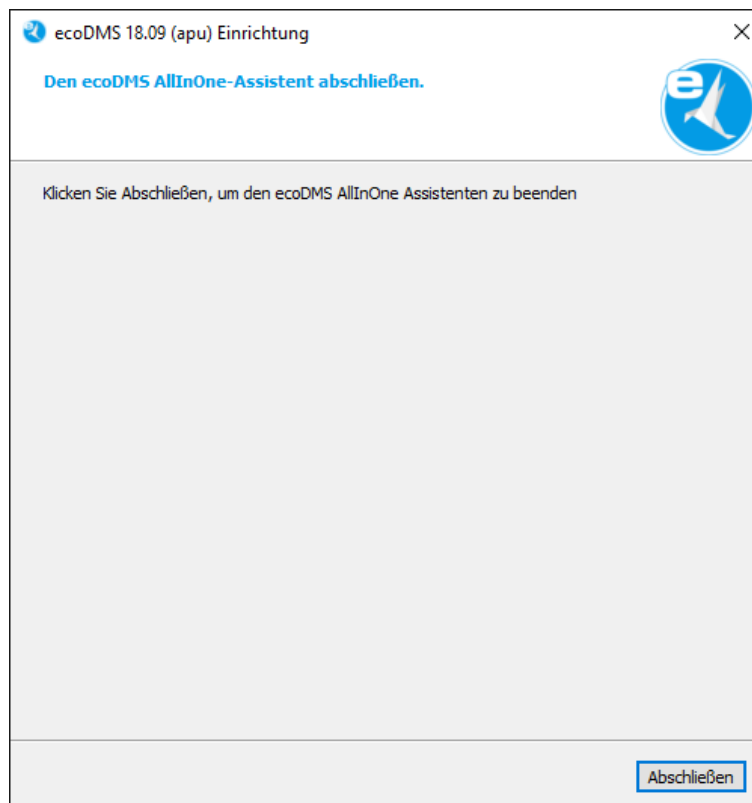


Figure 2.8: AllInOneInstaller: Installation complete (Windows)

2.2.2 ecoDMS Server

Use this installation file to install ecoDMS Server. As a client-server system, ecoDMS Server forms the base of ecoDMS. It is the main software component of ecoDMS Archive. In order to work with each of the components (ecoDMS Client, ecoDMS Webclient, plugins, API REST service...), the server must be accessible and stable. The following explains how to install ecoDMS Server under Windows[7, 1, 2, 4, 3, 6].

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

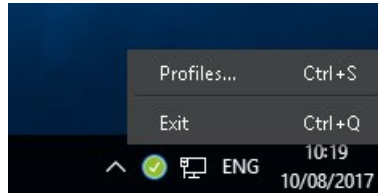


Figure 2.9: Exit Connection Manager

2. Download the file for ecoDMS Server at ecodms.de.
3. If this is a ZIP-file, unzip it first.
4. Execute the installation file "...exe".
5. The setup wizard opens. Click "Next" in the "Welcome Screen".

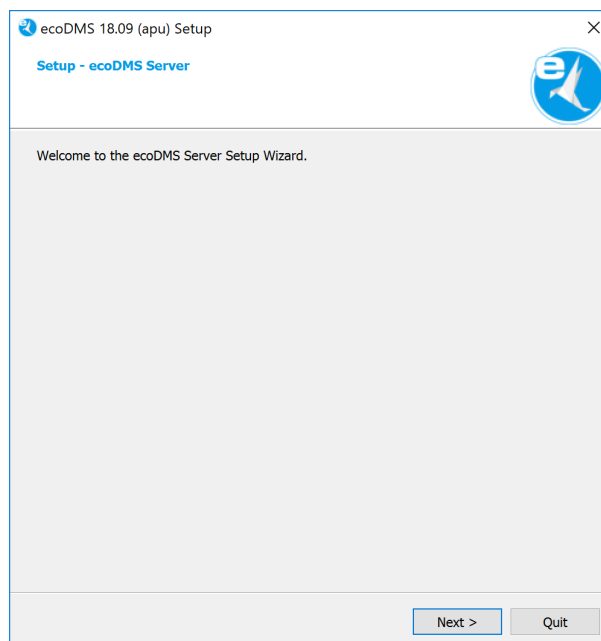


Figure 2.10: Install ecoDMS Server: Start Screen

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

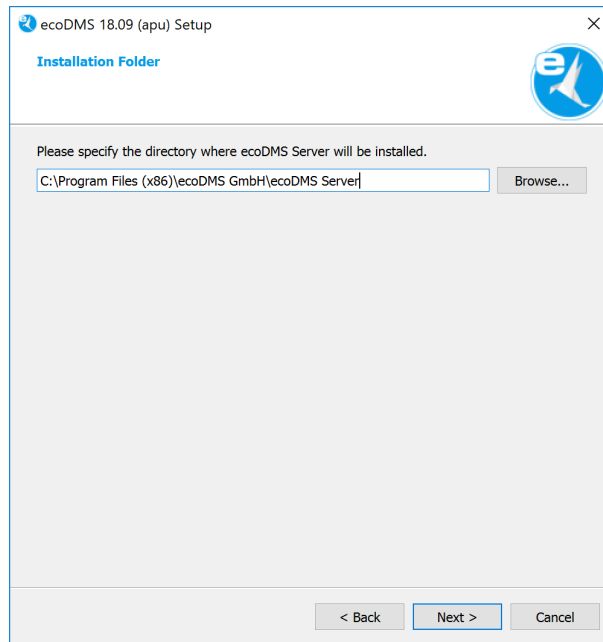


Figure 2.11: Install ecoDMS Server: Installation Folder

7. Select the server components you want to install.

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

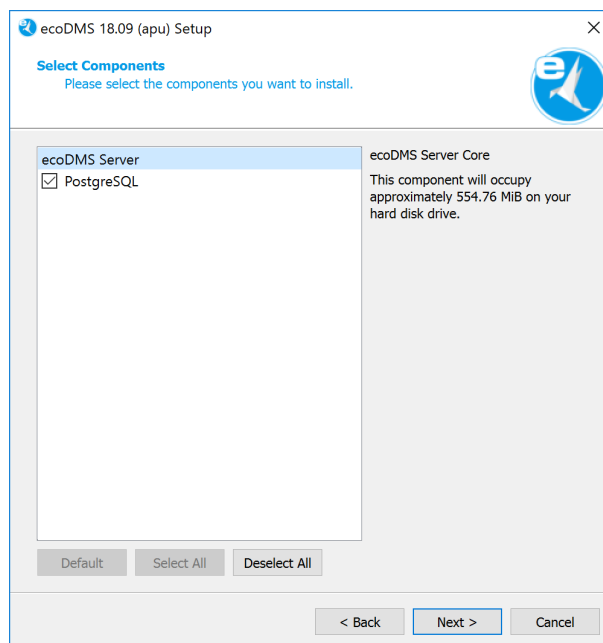


Figure 2.12: Install ecoDMS Server: Select Components

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

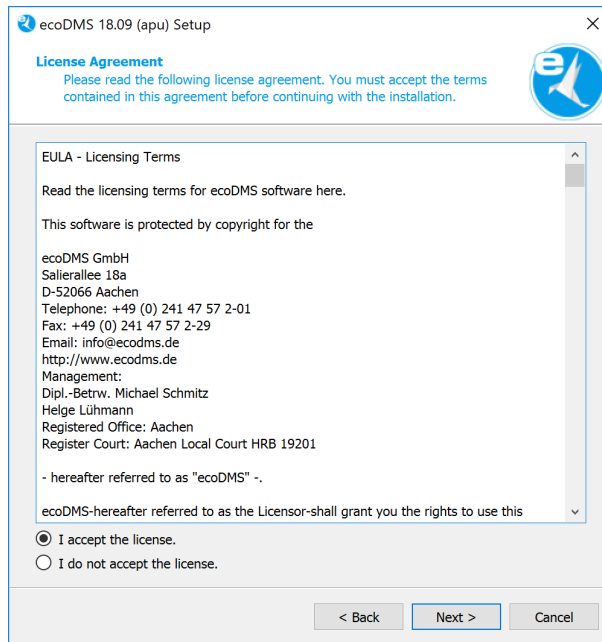


Figure 2.13: Install ecoDMS Server: License Agreement

- 9. In the start menu, select the folder in which you want to create the application shortcuts. You can specify a name to create a new folder. Click "Next" to continue.

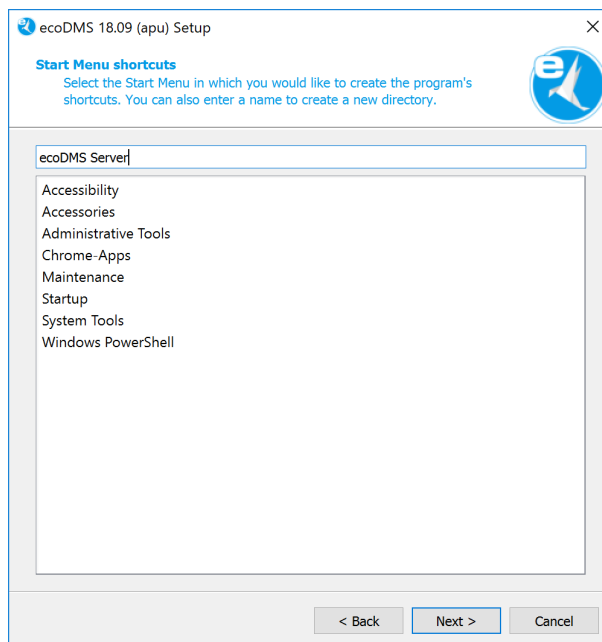


Figure 2.14: Install ecoDMS Server: Start Menu Shortcut

- 10. The following describes how to setup the database, ports and language. In a standard setup, the default ports should not be changed. The ports are used, for example, for the client connections and for the database. If the selected port is already occupied, an error message displays[3].

Select the data folder: The data folder is the target folder for the container storage system. This is where ecoDMS saves the data. In a default installation, the default folder should not be changed. You can change the suggested folder by clicking "Browse" or "...". We recommend using the largest possible memory for the data folder.

ecoDMS Port for client connections: Assign the port for the connection between ecoDMS Desktop Client and ecoDMS Server. The default port is:

17001

Database port: Assign the port for the database. The default port is:

17002

Web access port: Assign the port for accessing ecoDMS Webclient. The default port is:

8080

Apply firewall rules for remote access: The firewall controls the incoming and outgoing traffic between computer and internet. As a rule, you do not need to modify the general firewall settings. To access ecoDMS from outside and enable the web service, the default settings for the port are not sufficient. They must be shared. Check the checkbox to enable the firewall for ecoDMS and web access. ecoDMS makes the necessary settings automatically. Under Windows you can manage the firewall settings at System Settings -> System and Security -> Windows Firewall (-> Advanced settings).

ecoDMS languag setting: Select the language in which you want to save the attributes and ecoDMS functions for all users (e.g. classification attributes, status...) You can install the server in the languages German or English.

a) **Port Information:**

- The port specified during the ecoDMS installation is automatically specified in the firewall.
- If a compatible version of postgresQL is already installed, the installation of the ecoDMS Server does not create a new instance. A new database (ecodms) is created in the existing instance.
- If postgresQL was installed manually, ensure that it was the postgresQL version supported by ecoDMS.
 - During the installation, ecoDMS requests the login credentials for the existing postgresQL database.
- If postgresQL was installed manually, make sure that the postgresQL service is started before ecoDMS Server. Otherwise ecoDMS Server cannot run.

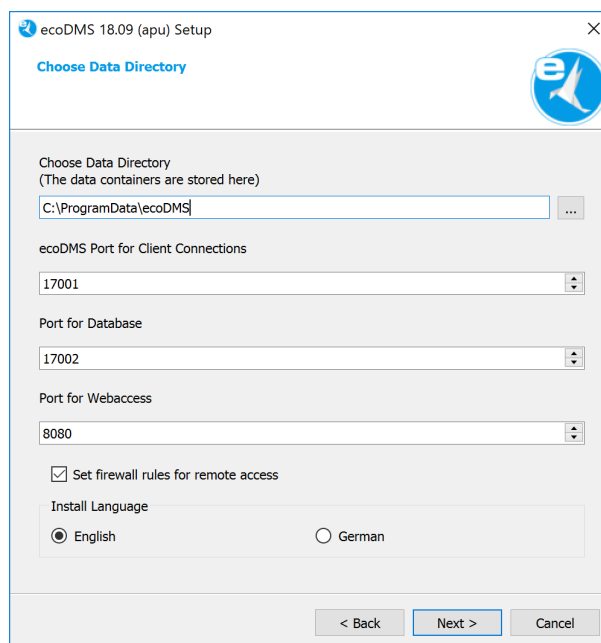


Figure 2.15: Install ecoDMS Server: Database and Port Settings

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

- a) You can only install default settings on a German Windows operating system.
- b) On non-German operating systems, this installation step is not displayed.

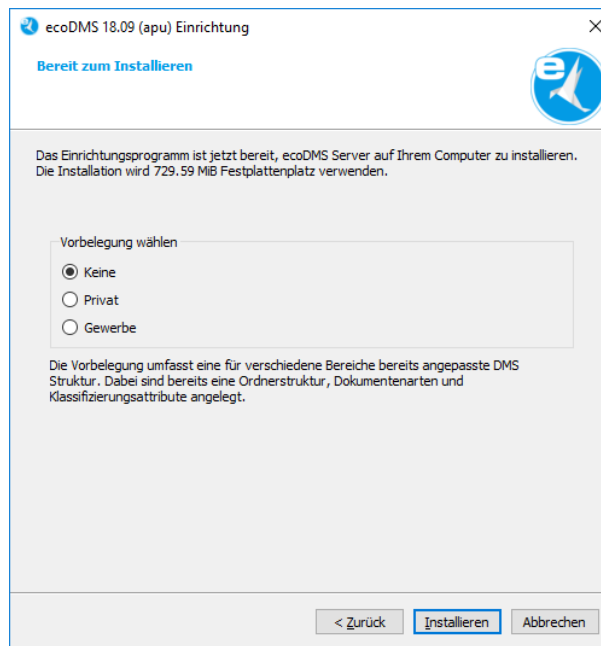


Figure 2.16: Install ecoDMS Server: Default Settings (Only for German System Environment)

12. ecoDMS Server is now ready for installation. Start the installation by clicking the "Continue" button. The installation process may take a while.

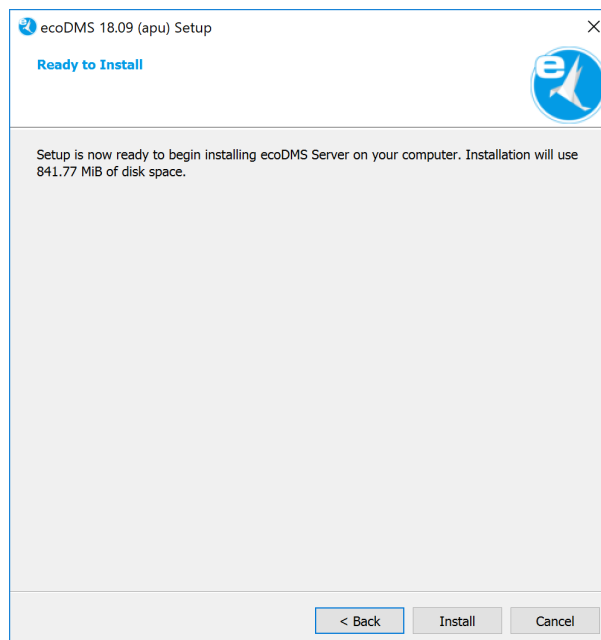


Figure 2.17: Install ecoDMS Server: Ready for Installation

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

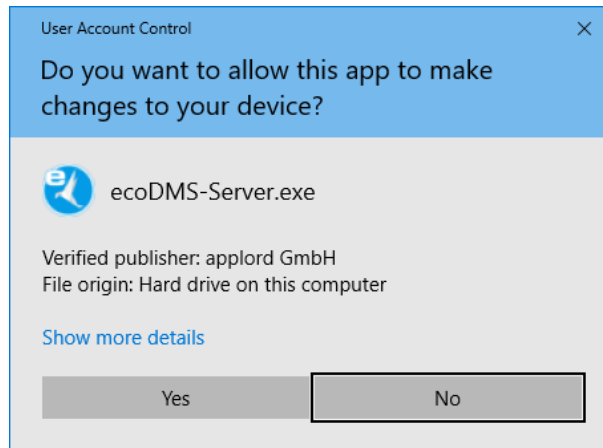


Figure 2.18: Install ecoDMS Server: User Account Control

14. If your installation is an update / upgrade, a message from postgresSQL will appear. Confirm this message with "OK" to continue with the installation.

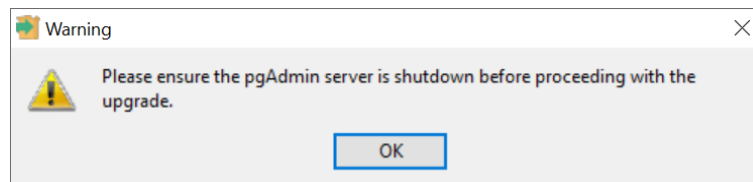


Figure 2.19: ecoDMS Server installieren: Meldung von postgresSQL

15. The installation is executed. This process may take a while.
- The following components are installed (depending on selection and software version).
 - ecoDMS Server
 - Microsoft Visual C++
 - postgresSQL

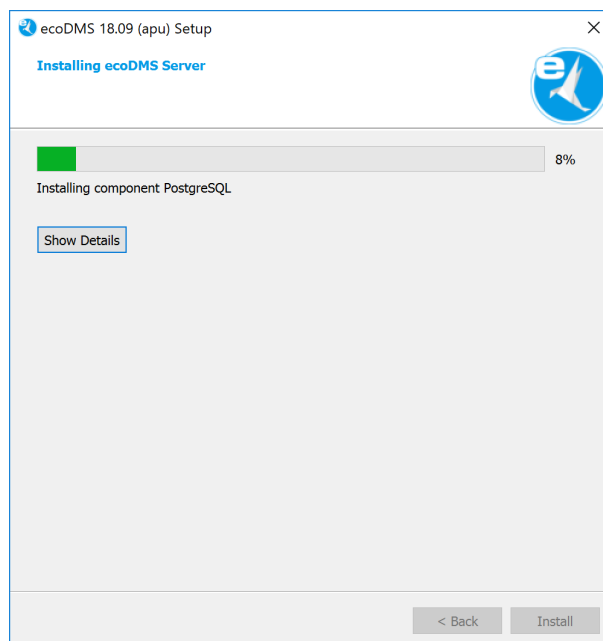


Figure 2.20: Install ecoDMS Server: Installation Process

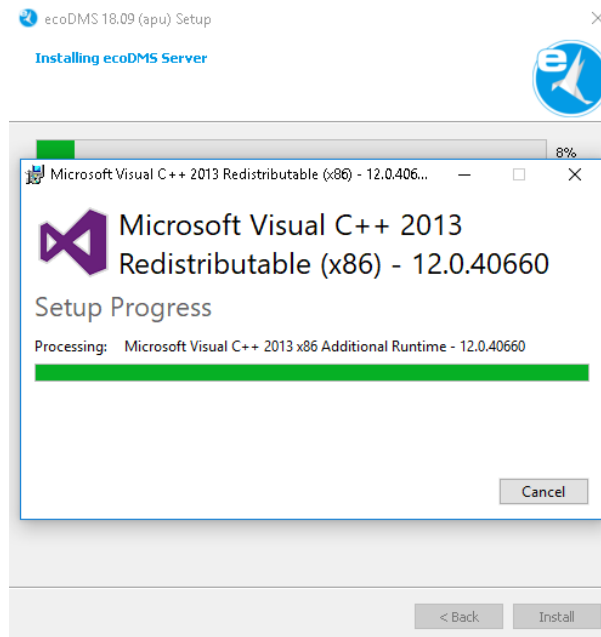


Figure 2.21: Install ecoDMS Server: MS Visual C++ 2013

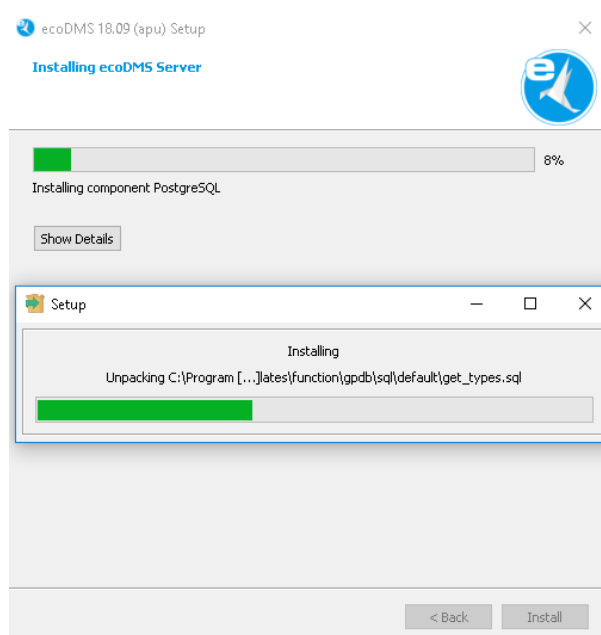


Figure 2.22: Install ecoDMS Server: postgresQL

16. Now the installation is complete. Click "Finish" to close the wizard.

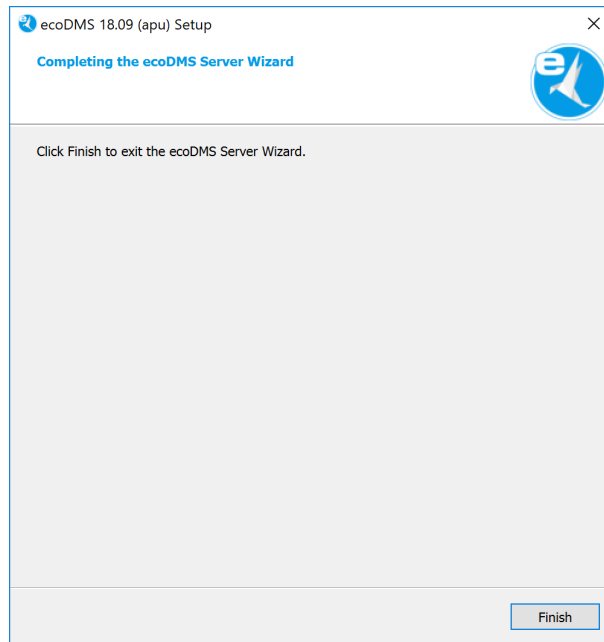


Figure 2.23: Install ecoDMS Server: Installation Completed

2.2.3 ecoDMS Client

Use this installation file to install the ecoDMS Archive user interface. Moreover, the Connection Manager and the Inbox are fixed components of this software package. The following explains the installation process of the ecoDMS Client under Windows [2, 4, 6].

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

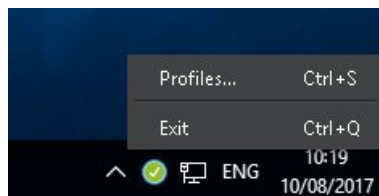


Figure 2.24: Exit Connection Manager

2. Download the file for the ecoDMS Client at ecodms.de.
3. If this is a ZIP-file, unzip it first.
4. Execute the installation file "...exe".
5. The setup wizard opens. Click "Next" in the "Welcome Screen".

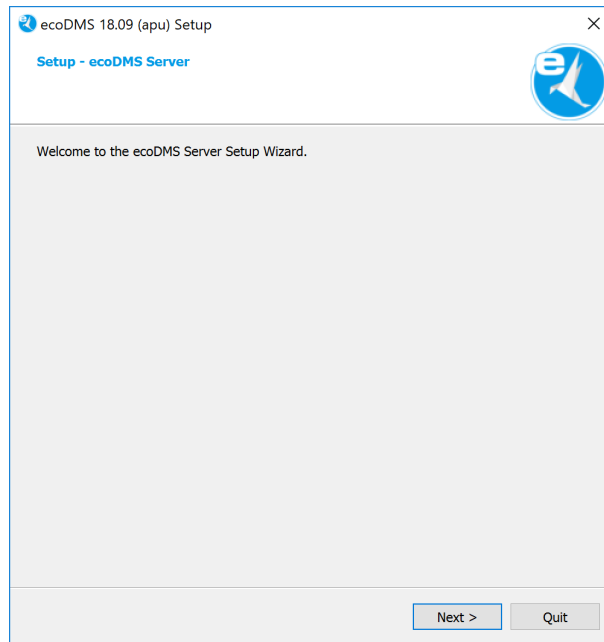


Figure 2.25: Install ecoDMS Client: Start Screen

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

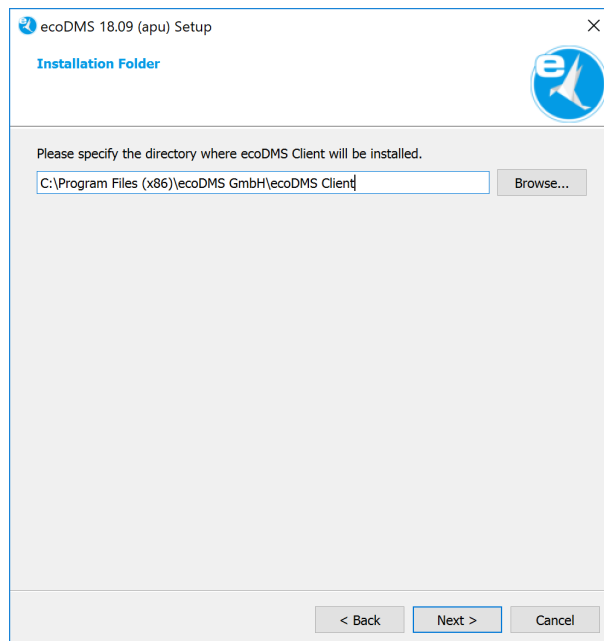


Figure 2.26: Install ecoDMS Client: Installation Destination

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

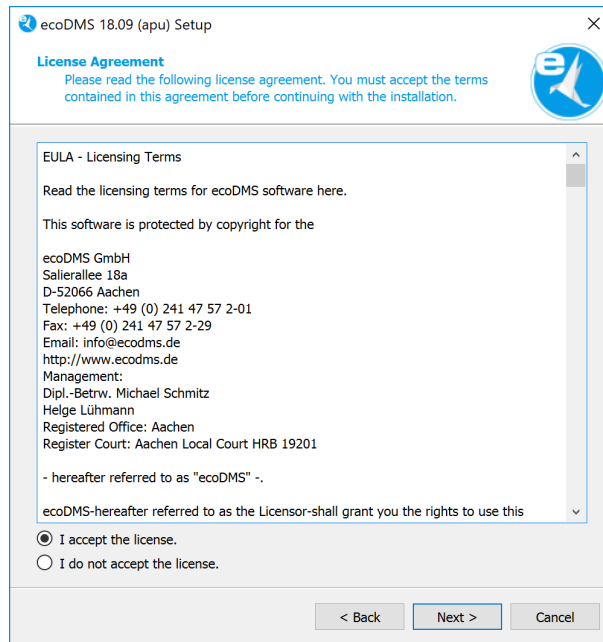


Figure 2.27: Install ecoDMS Client: License Agreement

8. In the start menu, select the folder in which you want to create the application shortcuts. You can specify a name to create a new folder. Click "Next" to continue.

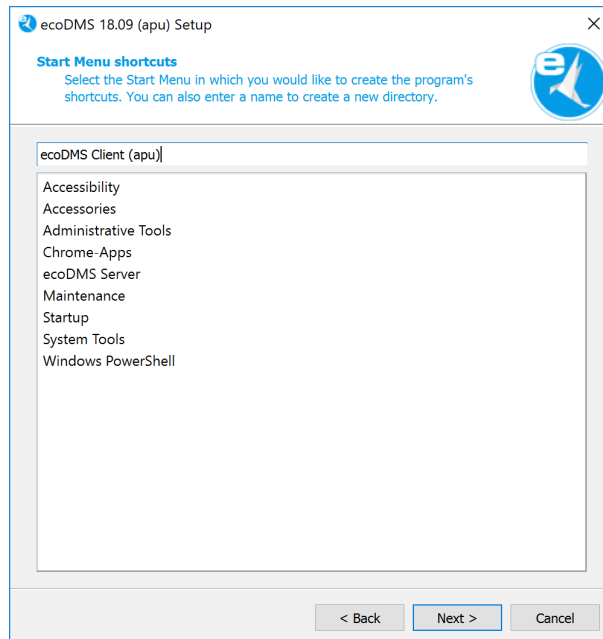


Figure 2.28: Install ecoDMS Client: Start Menu Shortcut

9. ecoDMS Client is now ready for installation.
 - a) Select the language in which you want to install ecoDMS Client on this computer.
 - i. You can install the client in German or English language.
 - b) Click "Install" to start installing.

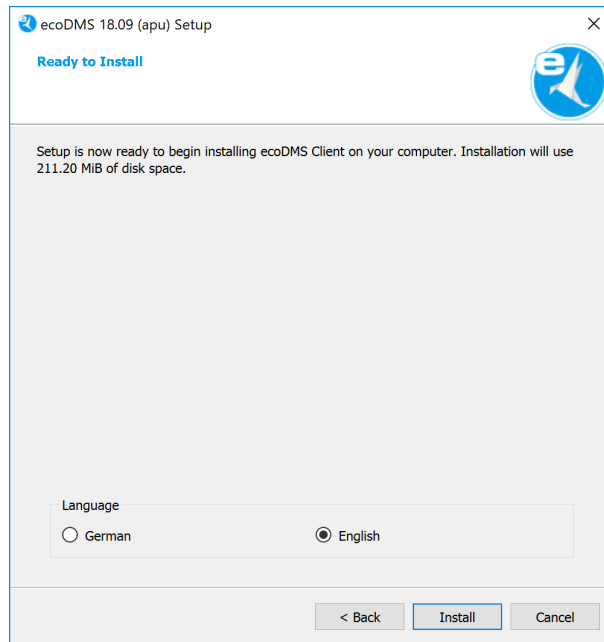


Figure 2.29: Install ecoDMS Client: Select Language and Start Installation

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

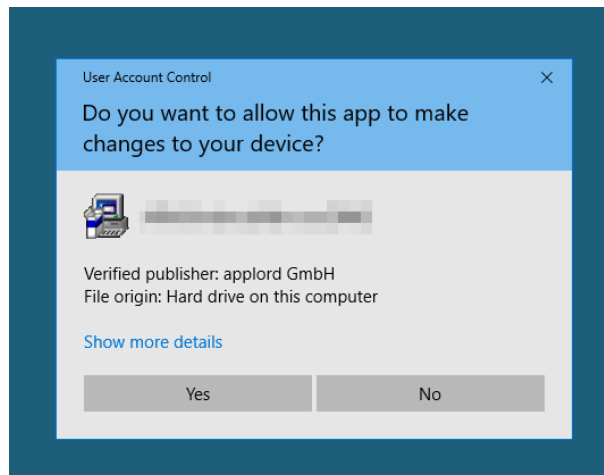


Figure 2.30: Install ecoDMS Client: Windows Confirmation Prompt

11. The installation is executed. This process may take a while.

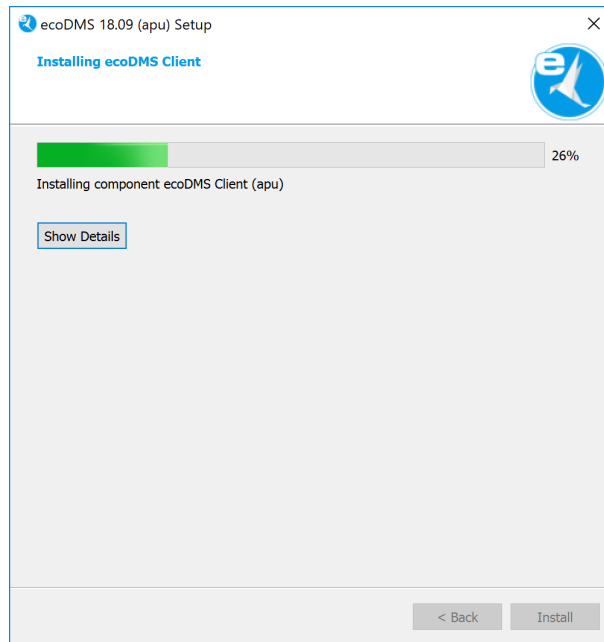


Figure 2.31: Install ecoDMS Client: Installation Process

12. Now the installation is complete. Click "Finish" to close the wizard.

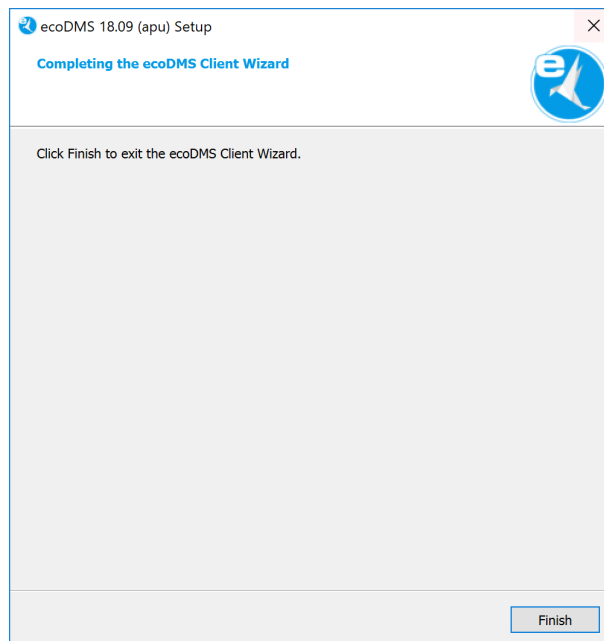


Figure 2.32: Install ecoDMS Client - Installation complete

2.2.4 ecoDMS Printer

Use this file to install the ecoDMS virtual PDF/A printer (printer driver). It enables printing a PDF/A file from any application that prints. The following explains the uninstall process of the ecoDMS Printer under Windows [2, 4, 6].

1. Download the file for the ecoDMS Printer at ecodms.de.
2. If this is a ZIP-file, unzip it first.
3. Execute the installation file "...exe".

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

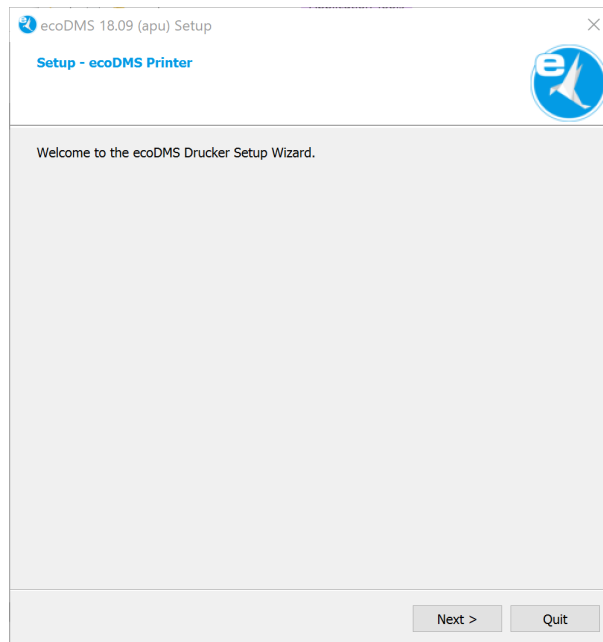


Figure 2.33: Install ecoDMS Printer: Start Screen

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

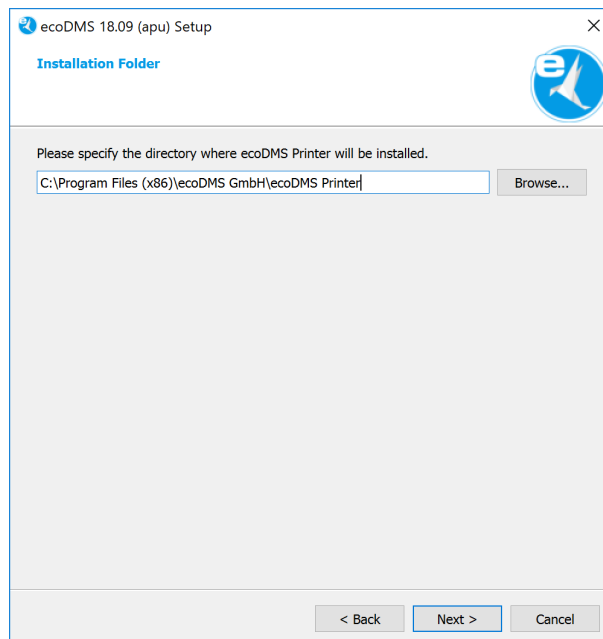


Figure 2.34: Install ecoDMS Printer: Installation Destination

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

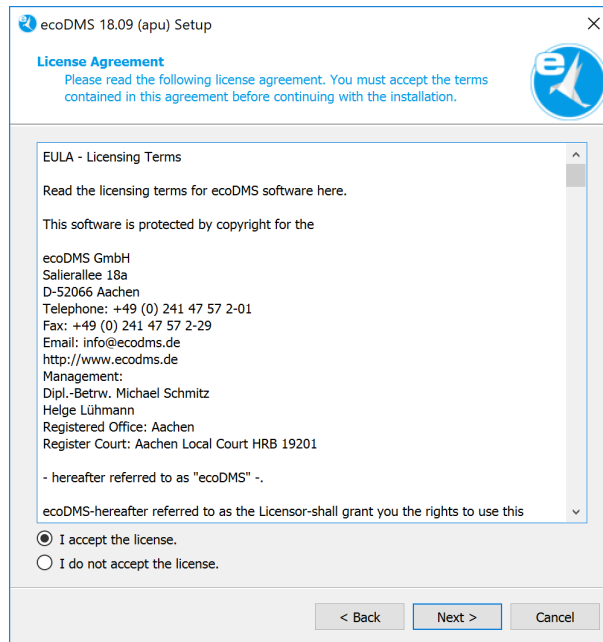


Figure 2.35: Install ecoDMS Printer: License Agreement

7. The ecoDMS printer is now ready for installation.
 - a) Select the language in which you want the ecoDMS printer to be installed on this computer.
 - i. You can choose German or English as the printer language.
 - b) Click "Install" to start installing.

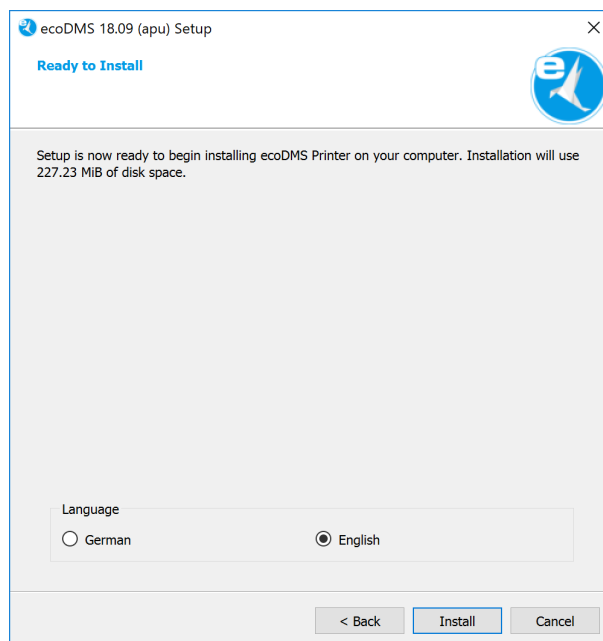


Figure 2.36: Install ecoDMS Printer: Select Language and Start Installation

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

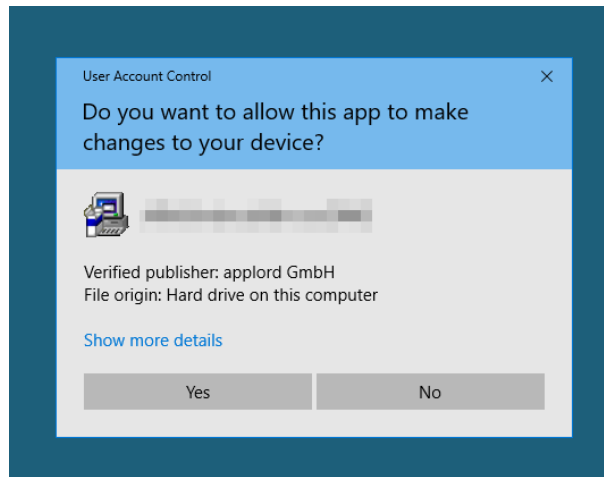


Figure 2.37: Install ecoDMS Printer: Windows Confirmation Prompt

9. The installation is executed. This process may take a while.

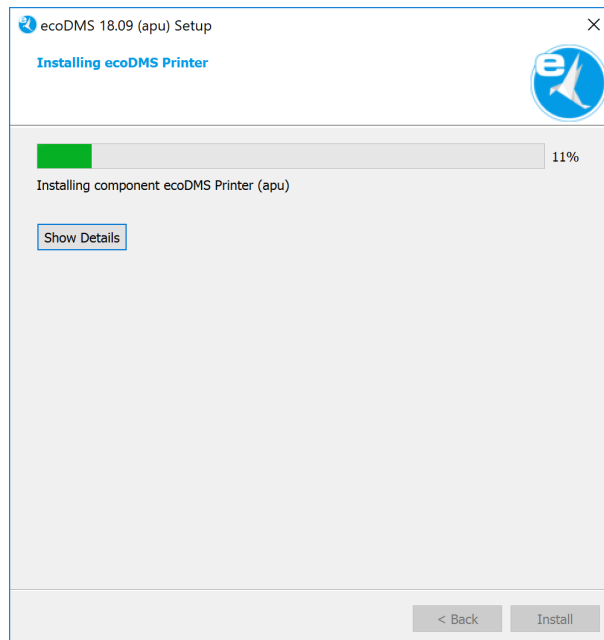


Figure 2.38: Install ecoDMS Printer: Installation Process

10. The installation is now complete. Click "Finish" to close the installation wizard.

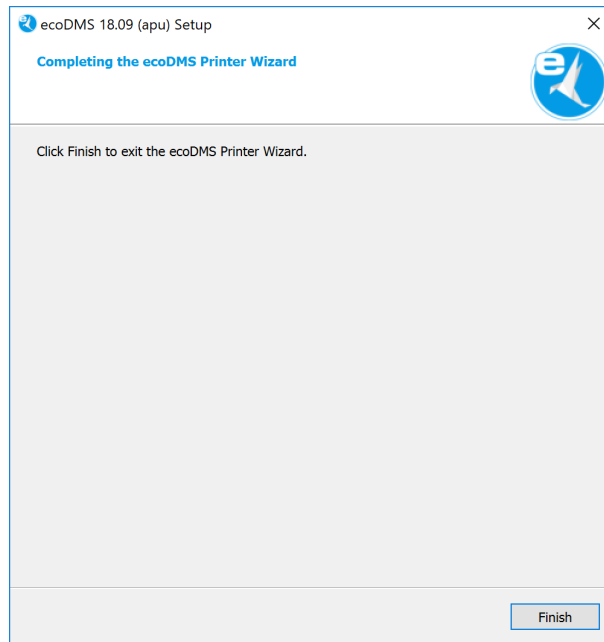


Figure 2.39: Install ecoDMS Printer - Installation Complete

2.3 Uninstall

The following section describes how to uninstall ecoDMS components under Windows [7, 5, 4].

2.3.1 Basics

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

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

An error has occurred while uninstalling.

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

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

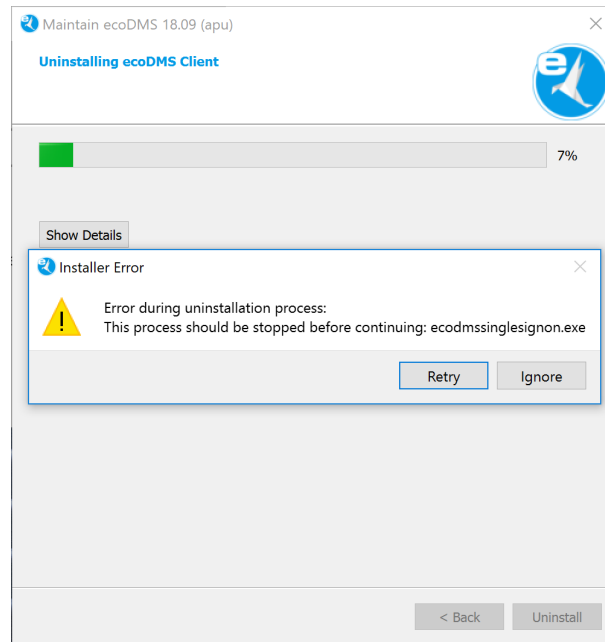


Figure 2.40: Error Message During Uninstall Process: ecodmssinglesignon.exe

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

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

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

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

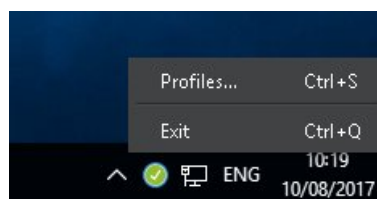


Figure 2.41: Exit Connection Manager

2.3.2 ecoDMS Server

The following explains the uninstall process of the ecoDMS Server under Windows [7, 5, 4].

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

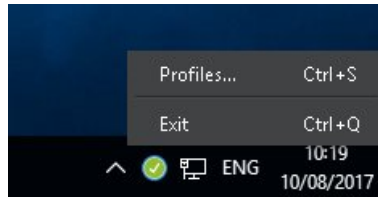


Figure 2.42: Exit Connection Manager

2. In the Windows Control Panel, open the interface to uninstall installed software ("Uninstall Program").
3. Select the "ecoDMS Server" software in the list of installed programmes.
4. The Uninstall wizard starts.
 - a) Select "Remove all components".
 - b) Now click "Continue".

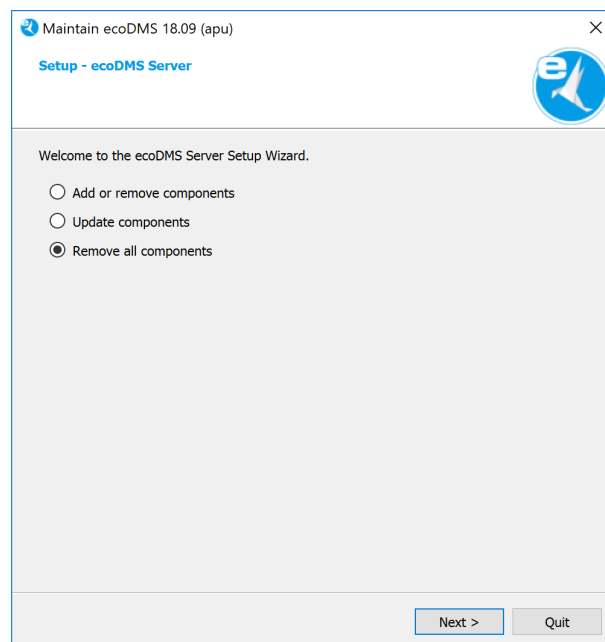


Figure 2.43: Uninstall ecoDMS Server - Select Components

5. Click "Uninstall" to start uninstalling. Click "Cancel" to abort the process.
 - a) Please note that by uninstalling the ecoDMS Server under Windows, the entire database of ecoDMS will be deleted. The ecoDMS Server component as well as the postgresSQL database with all archived documents, settings and information are deleted. You can only restore the data again if you created a complete and clean backup before uninstalling.

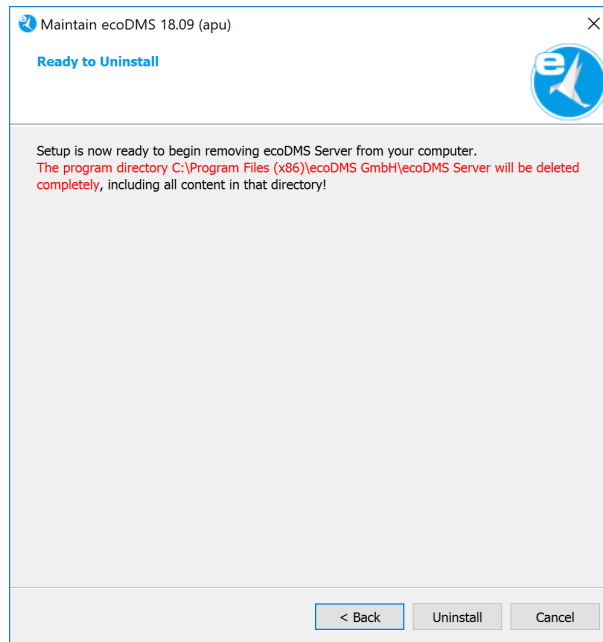


Figure 2.44: Uninstall ecoDMS Server - Delete Data Store

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

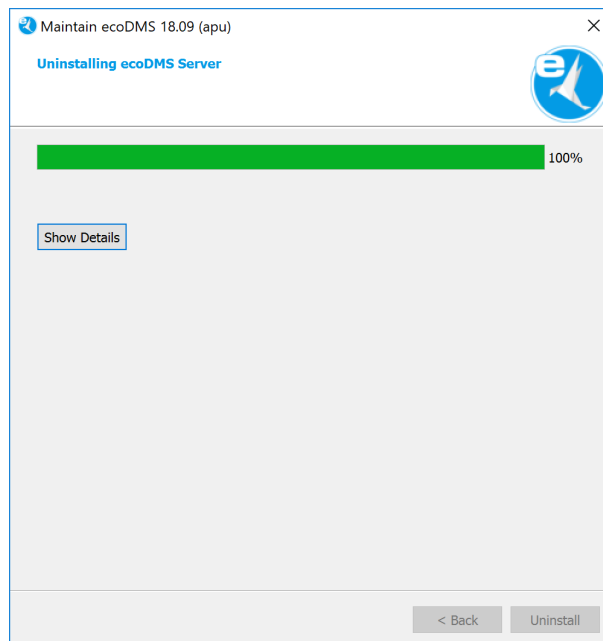


Figure 2.45: Uninstall ecoDMS Server - Uninstall Process

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

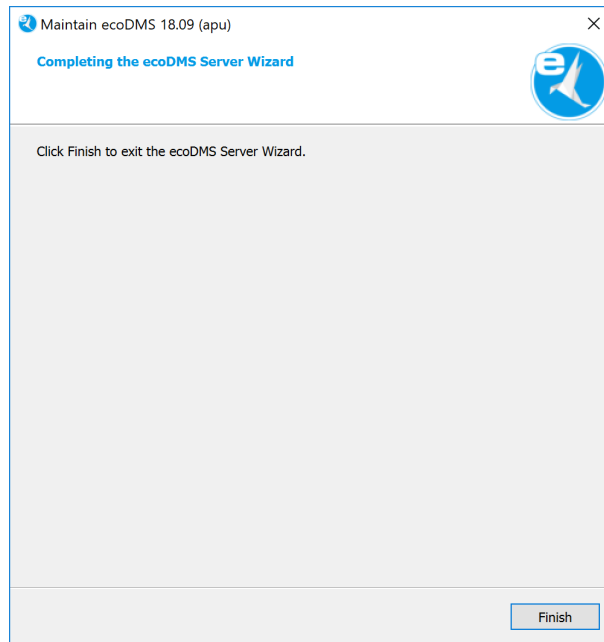


Figure 2.46: Uninstall ecoDMS Server - Uninstall Complete

2.3.3 ecoDMS Client

The following explains the uninstall process of the ecoDMS Client under Windows [4].

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

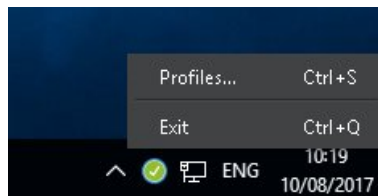


Figure 2.47: Exit Connection Manager

2. In the Windows Control Panel, open the interface to uninstall installed software ("Uninstall Program").
3. Select the "ecoDMS Client" software by double-clicking it in the list of installed programmes.
4. The Uninstall wizard starts.
 - a) Select "Remove all components".
 - b) Now click "Continue".

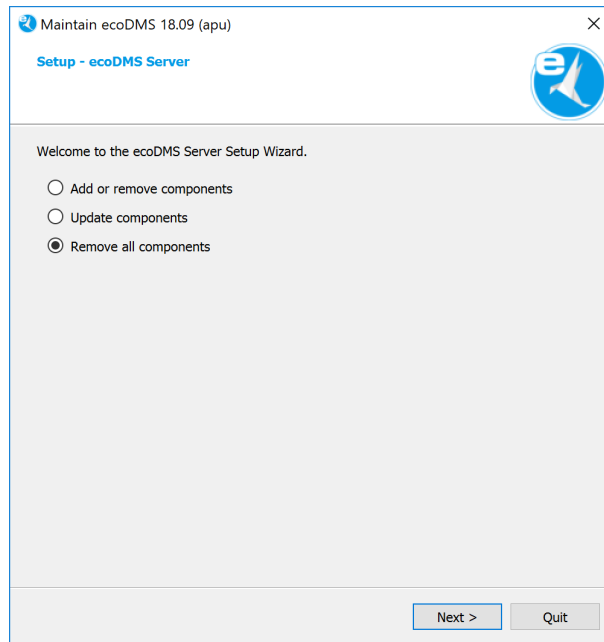


Figure 2.48: Uninstall ecoDMS Client - Select Components

5. Click "Uninstall" to start uninstalling. Click "Cancel" to abort the process.
 - a) Please note that all content from the listed folder will be irrevocably removed when you execute the uninstall process.

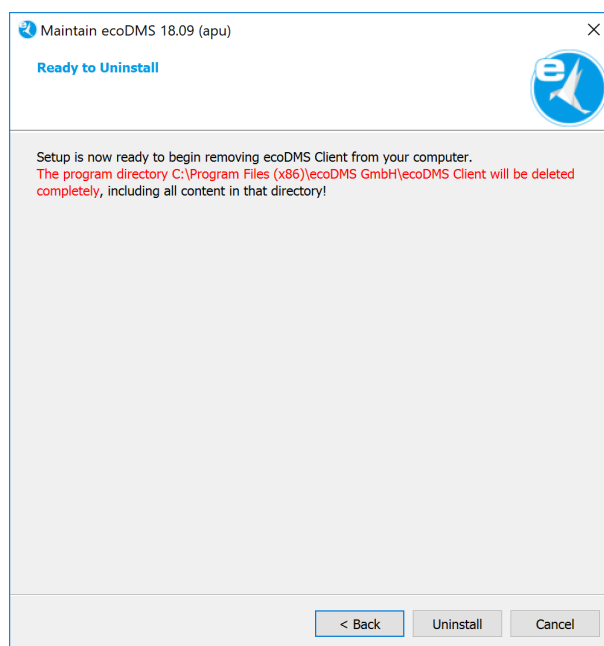


Figure 2.49: Uninstall ecoDMS Client - Delete Data Store

6. The following message only displays when the Connection Manager is still running. You must exit the Connection Manager before uninstalling.

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.

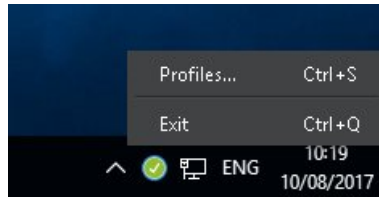


Figure 2.50: Exit Connection Manager

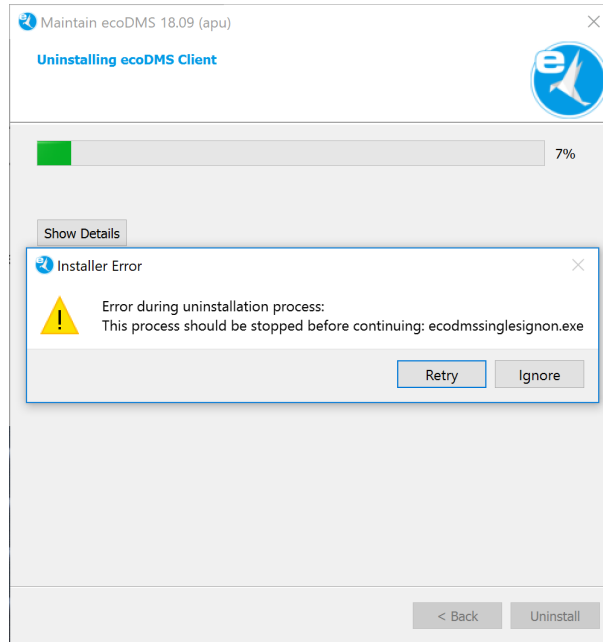


Figure 2.51: Error Message During Uninstall Process: ecodmssinglesignon.exe

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

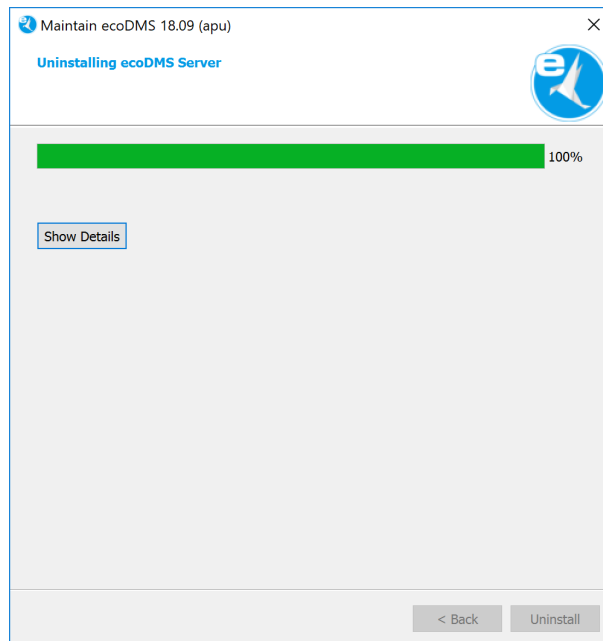


Figure 2.52: Uninstall ecoDMS Server - Uninstall Process

8. The uninstall process is now complete. ecoDMS Client has been removed from your system.

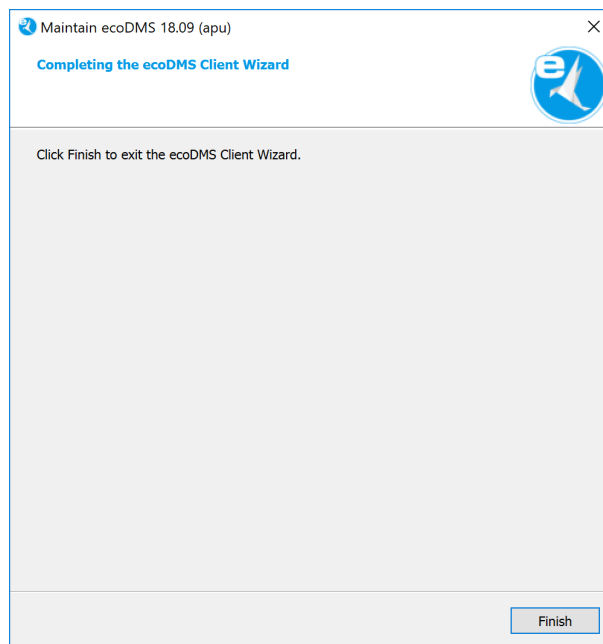


Figure 2.53: Uninstall ecoDMS Client - Uninstall Complete

2.3.4 ecoDMS Printer

The following explains the uninstall process of the ecoDMS Printer under Windows [4].

1. In the Windows Control Panel, open the interface to uninstall installed software ("Uninstall Program").
2. Select the "ecoDMS Printer" software by double-clicking it in the list of installed programmes.
3. The Uninstall wizard starts.
 - a) Select "Remove all components".
 - b) Click "Continue".

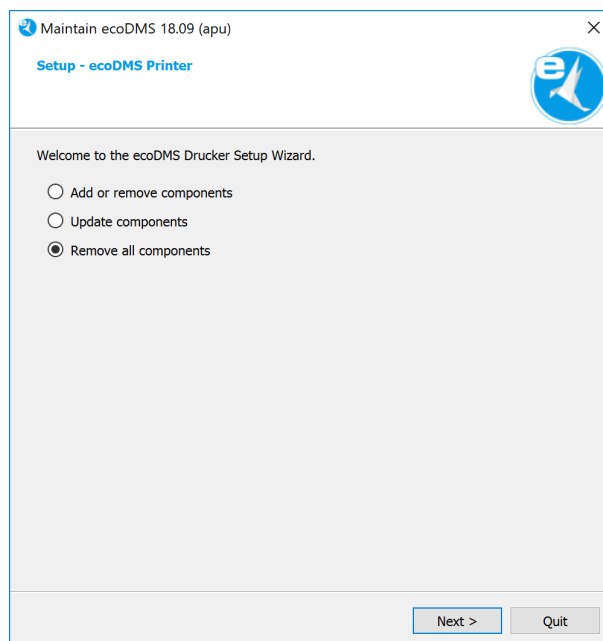


Figure 2.54: Uninstall Printer - Select Components

4. Click "Uninstall" to start uninstalling. Click "Cancel" to abort the process.
 - a) Please note that all content from the listed folder will be irrevocably removed when you execute the uninstall process.

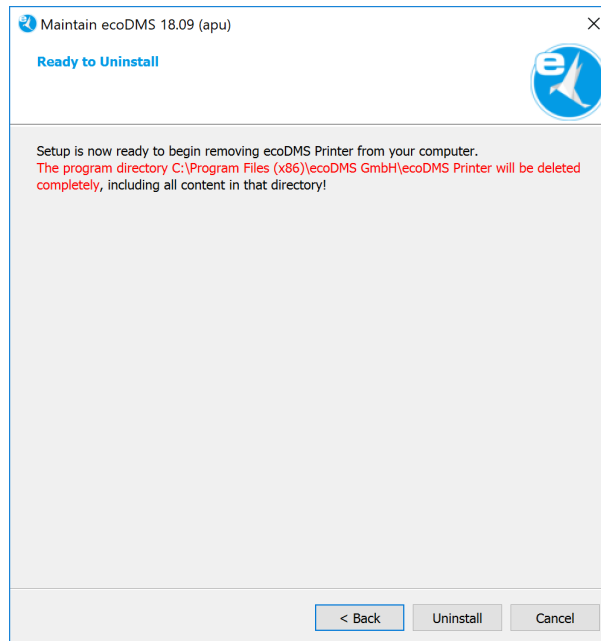


Figure 2.55: Uninstall ecoDMS Printer - Delete Data Store

5. The uninstall process is executed. This operation may take a while.
6. The uninstall process is now complete. ecoDMS Printer has been removed from your system.

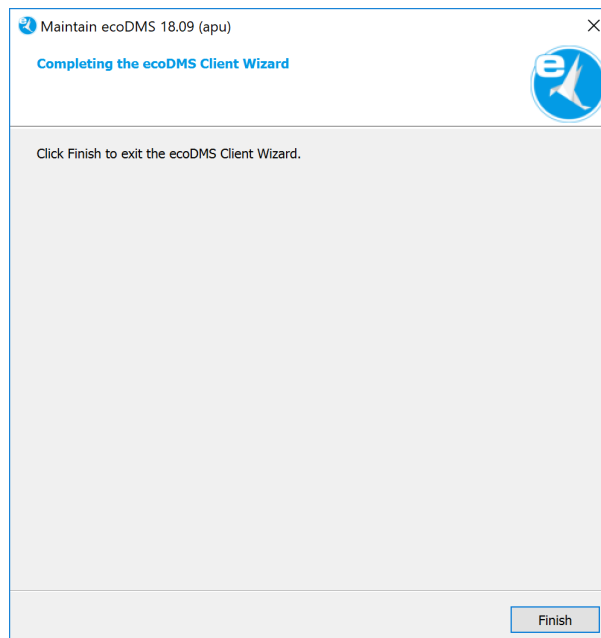


Figure 2.56: Uninstall ecoDMS Printer - Uninstall Complete

Important Information for Chapter 2

- [1] *Auf Windows Server Systemen muss die Installation unbedingt mit dem lokalen Administrator durchgeführt werden (nicht mit einem Domainen-Administrator).*
- [2] *Bei der Installation ist es möglich, dass die Firewall eine Nachfrage stellt, ob die Anwendung auf das Netzwerk zugreifen darf. Bestätigen Sie dies mit Ja.*
- [3] *Das Datenbankverzeichnis (postgreSQL) darf keine Leerzeichen, Umlaute oder Sonderzeichen beinhalten und muss auf einer lokalen Festplatte sein. Verwenden Sie hierfür kein Netz- oder NAS-Laufwerk (kein Share-Verzeichnis). Sollte postgreSQL bereits installiert sein, wird mit der Installation des ecoDMS Servers keine neue Instanz angelegt. Es wird in der bestehenden Instanz eine neue Datenbank (ecodms) angelegt. Wurde postgreSQL manuell installiert, muss bei der anschließenden Installation des ecoDMS Servers die postgreSQL-Installation abgeklickt werden. Wurde postgreSQL manuell installiert, stellen Sie sicher, dass es sich dabei um die von ecoDMS unterstützte postgreSQL Version handelt (postgreSQL 9.3.X - 32bit). Die Zugangsdaten für die bestehende postgreSQL-Datenbank werden bei der Installation abgefragt. Handelt es sich bei der bestehenden postgreSQL Version nicht um die zu ecoDMS passende Version, wird postgreSQL -wenn nicht im Installer von ecoDMS abgeklickt - parallel zum bestehenden System installiert. Wurde postgreSQL manuell installiert, stellen Sie sicher, dass der postgreSQL Dienst vor dem ecoDMS Server gestartet wird. Anderenfalls kann der ecoDMS Server nicht ausgeführt werden.*
- [4] *Erstellen Sie vor einem Update/Upgrade unbedingt ein Backup. Sollten Sie von einer Vorgängerversion auf das aktuelle Major Release upgraden, befolgen Sie bitte die Upgrade-Schritte im neueren Installationshandbuch. Bei einem einfachen Update des gleichen Major Releases können Sie die Software einfach drüber installieren. Es müssen stets alle Komponenten aktualisiert werden. Vermischen Sie auf keinen Fall die Komponenten einer früheren ecoDMS Version mit dieser Version. Nach einem Upgrade ist ein Downgrade zu einer älteren ecoDMS Version nur möglich, wenn von der Vorgängerversion ein vollständiges Backup vorliegt.*
- [5] *Mit dem Löschen der ecoDMS Server-Komponente werden bei ausgehender Standardinstallation (ecoDMS Server inkl. Datenbank über den ecoDMS Installer) auch alle ecoDMS Daten unwiderruflich gelöscht. Eine Wiederherstellung der archivierten Dateien, Informationen, Einstellungen etc. ist nur möglich, wenn Sie vor der Deinstallation ein vollständiges und sauberes Backup der gesamten Datenbank angefertigt haben. Ohne Backup ist eine Wiederherstellung der Daten nach der Deinstallation nicht mehr möglich.*
- [6] *Server und Client können in unterschiedlichen Sprachen installiert werden. Die Anzeige der Klassifizierungsattribute und Meldungen ist allerdings immer abhängig von der Sprachauswahl der ecoDMS Server-Komponente.*
- [7] *Wenn ecoDMS nach einer Deinstallation neu installiert werden soll, muss vorher unbedingt der betreffende Rechner neugestartet werden.*

3 Linux

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

3.1 Upgrade

The following section describes the upgrade process to the major release version 18.09 (apu) under Linux distributions.

3.1.1 Basics

1. When upgrading from a previous version to version 18.09 (apu), make sure that the last update of your ecoDMS version is installed on your system.
 - a) If this is not the case, you must update the previous version with the latest update before upgrading to version 18.09 (apu).
2. **Ensure you create a backup before updating or upgrading.**
3. **Please note that existing data will be migrated and full-text indexed in the background after the upgrade.**
 - a) The duration of the operation depends on the data volume.
 - b) Until the migration has completed, the server may show high capacity utilisation.
 - c) Leave the computer switched on until the migration is complete.
 - d) You can monitor the progress under "Settings - File Indexing" in the Settings dialogue box.

3.1.2 Process

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

1. Create a full backup of the existing database.
 - a) You can create the backup from ecoDMS version 14.08 (krusty) with the oneClick Backup component or with the console programme for manual backup.
2. **Upgrade from 16.09 to 18.09:**
 - a) Update sources.list in your system according to the apt sources listed in this manual.
 - b) Then update the package sources..

```
sudo apt-get update
```

- c) Now install the individual ecoDMS components according to the installation guide in this manual.

3. **Upgrade from 14.08 to 18.09:**

- a) Uninstall all existing ecoDMS components of the previous version according to the steps in your installation manual of the existing ecoDMS version.

14.08 (krusty):

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

- b) **Do not under any circumstances uninstall the postgresQL database.**

- i. Make sure that all components have been uninstalled.
 - ii. The components of the old and new version must not be mixed up.
- c) Restart the computer after the uninstall process.
- d) Now install the ecoDMS Server and the other components of the new ecoDMS version according to the new installation manual.
- e) Restart your computer.
- f) Now make a clean and complete import of the backup.
 - i. You can find a detailed description of the restore process in the ecoDMS manual.
- g) **Please note that existing data will be migrated and full-text indexed in the background after the upgrade.**
 - i. The duration of the operation depends on the data volume.
 - ii. Until the migration has completed, the server may show high capacity utilisation.
 - iii. Leave the computer switched on until the migration is complete.
 - iv. You can monitor the progress under "Settings - File Indexing" in the Settings dialogue box.

3.1.3 License Information

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

3.2 Installation

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

3.2.1 Basics

Please read the following information before installing:

- **Ensure you create a backup before updating or upgrading.**
- If you wish to upgrade from a previous version to the current major release, please follow the upgrade steps.
- For a simple update of the same major release, just install the software over the old version.
- You must always update all components.
- **Please note that the ecoDMS packages for Ubuntu and Debian are only available for 64-bit systems. There is a 32-bit version for the Raspberry Pi.**
- **Important notes for Raspberry Pi users:** We provided the ecoDMS Server version for Raspberry Pi as a playground for tech-savvy ecoDMS users. However, we do not recommend productive use with large data volumes and/or in companies. Due the limited performance we can not guarantee a remote access to the system with Raspberry Pi. To best exploit the advantages of the archiving solution, we recommend you install the ecoDMS components on high-performing software with respective storage capacity.

3.2.2 Install Editor

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

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

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

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

3.2.3 apt Sources

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

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

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

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

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

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

64bit / Ubuntu LTS 20.04 (Focal Fossa)

```
deb http://www.ecodms.de/ecodms_180964/focal /
```

64bit / Ubuntu LTS 18.04 (bionic)

```
deb http://www.ecodms.de/ecodms_180964/bionic /
```

64bit / Debian 11 (bullseye)

```
deb http://www.ecodms.de/ecodms_180964/bullseye /
```

64bit / Debian 10 (buster)

```
deb http://www.ecodms.de/ecodms_180964/buster /
```

64bit / Debian 9 (stretch)

```
deb http://www.ecodms.de/ecodms_180964/stretch /
```

32bit / Debian 9 (stretch) - Raspberry Pi

```
deb http://www.ecodms.de/ecodms_180964/raspi /
```

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

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

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

```
sudo apt-get update
```

3.2.4 ecoDMS Server

As a client-server system, the ecoDMS Server forms the base of the entire application. The server is not a piece of hardware, but a software component. The following explains the installation process of the ecoDMS server under Linux distributions [5, 2, 1, 4].

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

- Java 8:

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

- Java 7:

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

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

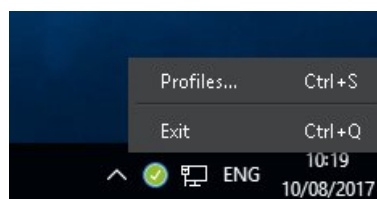


Figure 3.1: Exit Connection Manager

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

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

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

3.2.5 ecoDMS Client

Use this installation steps to install the ecoDMS Archive user interface. Moreover, the Connection Manager is a fixed component of this software package. The following explains the installation process of the ecoDMS Client under Linux distributions [2, 1, 4].

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

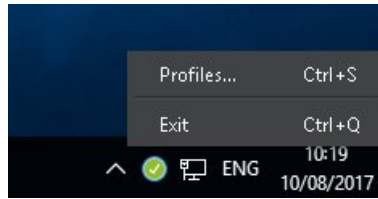


Figure 3.2: Exit Connection Manager

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

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

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

3.2.6 ecoDMS Printer

Use this steps to install the ecoDMS virtual PDF/A Printer (Printer driver). The following explains the installation process of the ecoDMS Printer under Linux distributions [2, 1, 4].

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

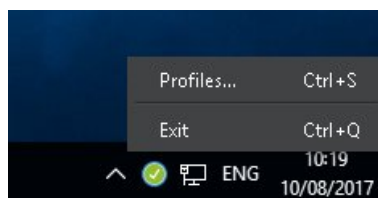


Figure 3.3: Exit Connection Manager

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

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

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

3.3 Uninstall

The following section describes how to uninstall ecoDMS components under Linux distributions [5, 3, 2].

3.3.1 ecoDMS Server

The following explains the uninstall process of the ecoDMS Server under Linux distributions [5, 3, 2].

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

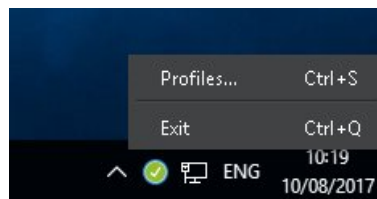


Figure 3.4: Exit Connection Manager

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

```
sudo apt-get remove ecdmserver
```

3.3.2 ecoDMS Client

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

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

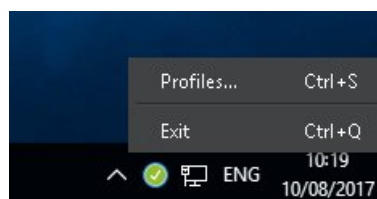


Figure 3.5: Exit Connection Manager

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

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

3.3.3 ecoDMS Printer

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

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

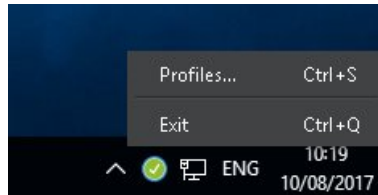


Figure 3.6: Exit Connection Manager

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

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

Important Information for Chapter 3

- [1] *Das Datenbankverzeichnis (postgreSQL) darf keine Leerzeichen, Umlaute oder Sonderzeichen beinhalten und muss auf einer lokalen Festplatte sein. Verwenden Sie hierfür kein Netz- oder NAS-Laufwerk (kein Share-Verzeichnis). Sollte PostgreSQL bereits installiert sein, wird mit der Installation des ecoDMS Servers keine neue Instanz angelegt. Es wird in der bestehenden Instanz eine neue Datenbank (ecodms) angelegt. Wurde PostgreSQL manuell installiert, muss bei der anschließenden Installation des ecoDMS Servers die PostgreSQL-Installation abgeklückt werden. Wurde PostgreSQL manuell installiert, stellen Sie sicher, dass es sich dabei um die von ecoDMS unterstützte PostgreSQL Version handelt (postgreSQL 9.3.X - 32bit). Die Zugangsdaten für die bestehende PostgreSQL-Datenbank werden bei der Installation abgefragt. Handelt es sich bei der bestehenden PostgreSQL Version nicht um die zu ecoDMS passende Version, wird PostgreSQL -wenn nicht im Installer von ecoDMS abgeklückt - parallel zum bestehenden System installiert. Wurde PostgreSQL manuell installiert, stellen Sie sicher, dass der PostgreSQL Dienst vor dem ecoDMS Server gestartet wird. Anderenfalls kann der ecoDMS Server nicht ausgeführt werden.*
- [2] *Erstellen Sie vor einem Update/Upgrade unbedingt ein Backup. Sollten Sie von einer Vorgängerversion auf das aktuelle Major Release upgraden, befolgen Sie bitte die Upgrade-Schritte im neueren Installationshandbuch. Bei einem einfachen Update des gleichen Major Releases können Sie die Software einfach drüber installieren. Es müssen stets alle Komponenten aktualisiert werden. Vermischen Sie auf keinen Fall die Komponenten einer früheren ecoDMS Version mit dieser Version. Nach einem Upgrade ist ein Downgrade zu einer älteren ecoDMS Version nur möglich, wenn von der Vorgängerversion ein vollständiges Backup vorliegt.*
- [3] *Mit dem Löschen der ecoDMS Server-Komponente werden bei ausgehender Standardinstallation (ecoDMS Server inkl. Datenbank über den ecoDMS Installer) auch alle ecoDMS Daten unwiderruflich gelöscht. Eine Wiederherstellung der archivierten Dateien, Informationen, Einstellungen etc. ist nur möglich, wenn Sie vor der Deinstallation ein vollständiges und sauberes Backup der gesamten Datenbank angefertigt haben. Ohne Backup ist eine Wiederherstellung der Daten nach der Deinstallation nicht mehr möglich.*
- [4] *Server und Client können in unterschiedlichen Sprachen installiert werden. Die Anzeige der Klassifizierungsattribute und Meldungen ist allerdings immer abhängig von der Sprachauswahl der ecoDMS Server-Komponente.*
- [5] *Wenn ecoDMS nach einer Deinstallation neu installiert werden soll, muss vorher unbedingt der betreffende Rechner neugestartet werden.*

4 NAS

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

4.1 Upgrades

The following section describes the upgrade process to the **major release** version 18.09 (apu) on a NAS (Network Attached Storage).

4.1.1 Basics

1. When upgrading from a previous version to version 18.09 (apu), make sure that the last update of your ecoDMS version is installed on your system.
 - a) If this is not the case, you must update the previous version with the latest update before upgrading to version 18.09 (apu).
2. **Ensure you create a backup before updating or upgrading.**
3. **Note: BEFORE upgrading the container, please make sure that no files are in the inbox and all documents are saved to the archive.**
4. Do not change or delete the data directory when you make an update / upgrade.
5. For a standard ecoDMS installation on a NAS you require:
 - a) a new, empty folder for the data (e.g. under "Container", example "ecodmsdata1809")
 - i. **Important! Create new folders for an upgrade installation!**
 - ii. **Do not use folders that you have already used for a previous installation of ecoDMS!**
 - b) and shared folders for
 - i. Backup
 - ii. Restore
 - iii. Scaninput
 - A. **Please note that if you want to share the folders, you must assign permissions to the shared folders.**
6. Please note that existing data will be migrated and full-text indexed in the background after the upgrade.
 - a) The duration of the operation depends on the data volume.
 - b) Until the migration has completed, the server may show high capacity utilisation.
 - c) Leave the computer switched on until the migration is complete.
 - d) You can monitor the progress under "Settings - File Indexing" in the Settings dialogue box.

4.1.2 Process

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

1. Create a full backup of the existing database.

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

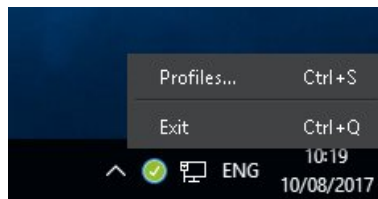


Figure 4.1: Exit Connection Manager

3. Please note the upgrade basics before you start (folders on NAS).
4. Stop the ecoDMS Server on your NAS system.
5. Search at "Docker - Registration" for the "ecoDMS/allinone-18.09" package.
6. Download this package.
7. Now click the loaded image under "image".
8. Click "Start" to start the image.
9. Now complete all installation steps for your system, starting with "Create Container".
10. After creating the container, you can restore the backup.

4.1.3 License Information

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

4.2 Update

The following section describes the update process to a **minor release** of ecoDMS version 18.09 (apu) on a NAS (Network Attached Storage).

4.2.1 Basics

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

4.2.2 Container-Update

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

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

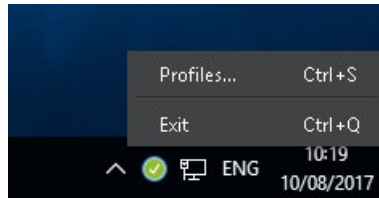


Figure 4.2: Exit Connection Manager

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

4.2.3 License Information

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

4.3 ecoWORKZ

If you have purchased ecoWORKZ with your ecoDMS license, you must read the installation notes in the ecoWORKZ manual.

- If you want to install ecoWORKZ on a NAS, you must adjust the port settings of the container accordingly.
- You must also modify the port in ecoDMS Client.
- To use the file import, you must set up and select a folder in the File Station of your NAS.

4.4 Synology Installation (ecoDMS Server)

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

4.4.1 Create Folder Structure for ecoDMS (Example)

For a standard ecoDMS installation on a NAS you require

1. a folder for the data (e.g. under "Container"),

2. a shared folder for
 - a) Backup,
 - b) Restore
 - c) and Scaninput.

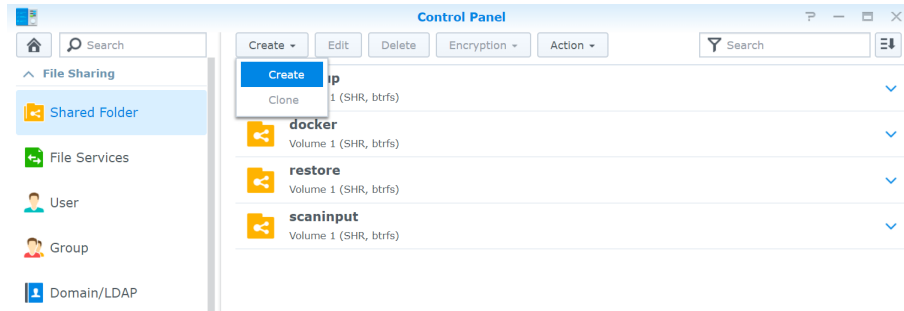


Figure 4.3: Synology - Create Shared Folder

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

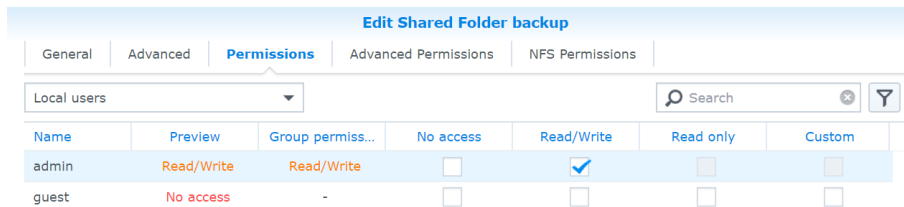


Figure 4.4: Synology - Shared Folder - Permissions

A typical folder structure could look like this:

```

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

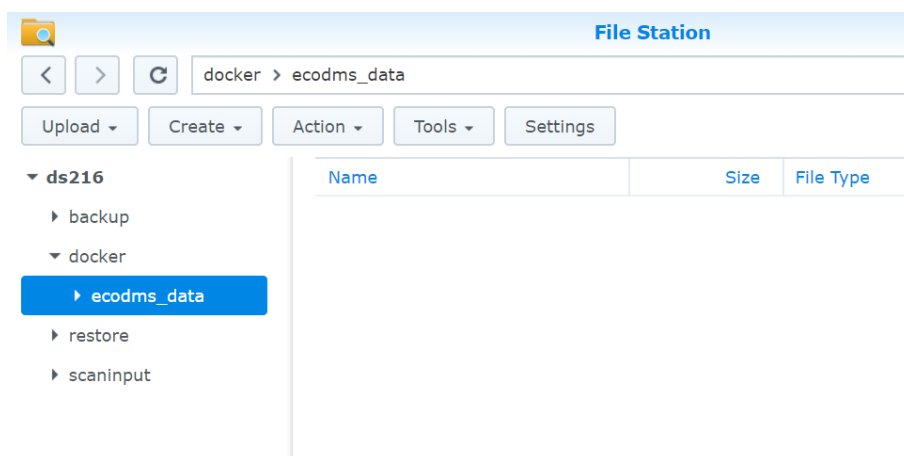


Figure 4.5: Synology - Folder Structure (Example)

4.4.2 Install & Open Docker

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



Figure 4.6: Synology - Install Docker App

4.4.3 Search & Install ecoDMS Images

1. In the "Registration" area of the "Docker" app, search for the "ecoDMS image" with the name "ecoDMS/allinone-18.09".
2. Then install the package by
 - a) right-clicking the image and
 - b) then clicking "Download This Image".

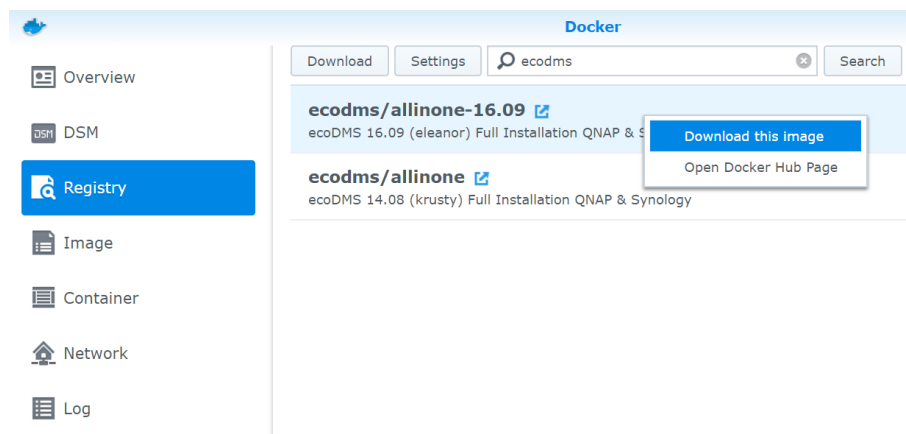


Figure 4.7: Synology - Install ecoDMS Image

4.4.4 Create Container

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

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

4.4.5 Container Settings

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

The screenshot shows a 'Create Container' window for the image 'ecodms/allinone-16.09(latest)'. The 'General Settings' section is visible, with the following configuration:

- Container Name: ecoDMS-16.09
- Execute container using high privilege:
- Enable resource limitation:
- CPU Priority: Med (selected)
- Memory Limit: 512 MB

At the bottom right, there are 'Next' and 'Cancel' buttons.

Figure 4.8: Synology - Container Name

2. Click "Extended Settings".
3. Select the "Port Settings" tab.

Local Port	Container Port
17001	17001
17002	17002
17004	8080
17005	8180

- a) The following figure shows an example for the configuration of "Port Forwarding":
 - i. Container port: 17001 (ecoDMS) → Access via ecoDMS connection manager (17001)
 - A. Container port: 17002 (ecoDMS) → Database access
 - B. Container port: 8080 (web interface) → External access via port 17004
 - C. Container port: 8180 (API) → External access via port 17005

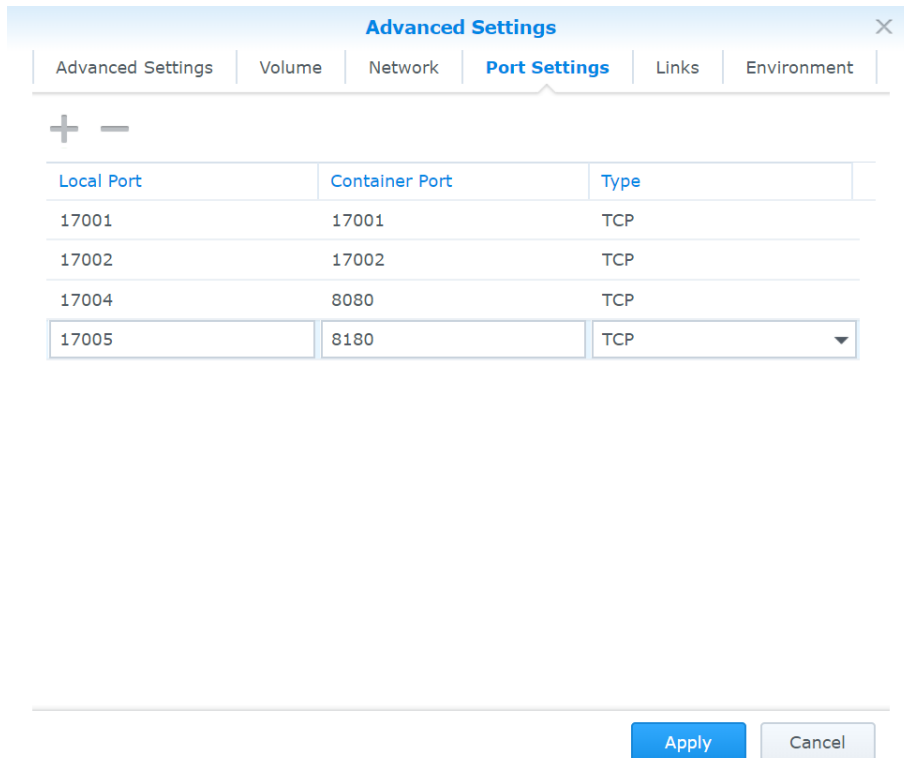


Figure 4.9: Synology - Extended Settings (Port)

4. Now select the "Volume" tab.

4.4.6 Configure Mount Paths

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

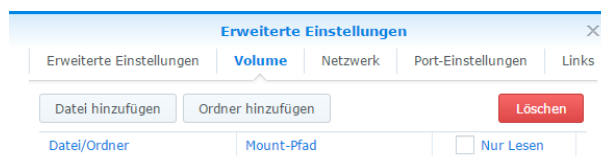


Figure 4.10: Synology - Extended Settings - Add Folder

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

a) Please select the directories you created under "Volume from host".

Volume from host	Mount Point
ecodmsdata1809	/srv/data
scaninput1809	/srv/scaninput
backup1809	/srv/backup
restore1809	/srv/restore

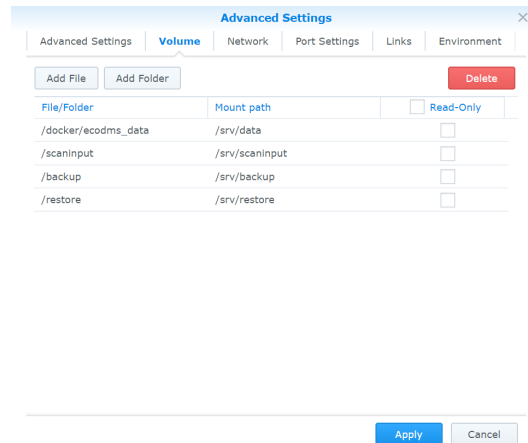


Figure 4.11: Synology - Extended Settings - ecoDMS Data Storage Location

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

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

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

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

```
/srv/scaninput
```

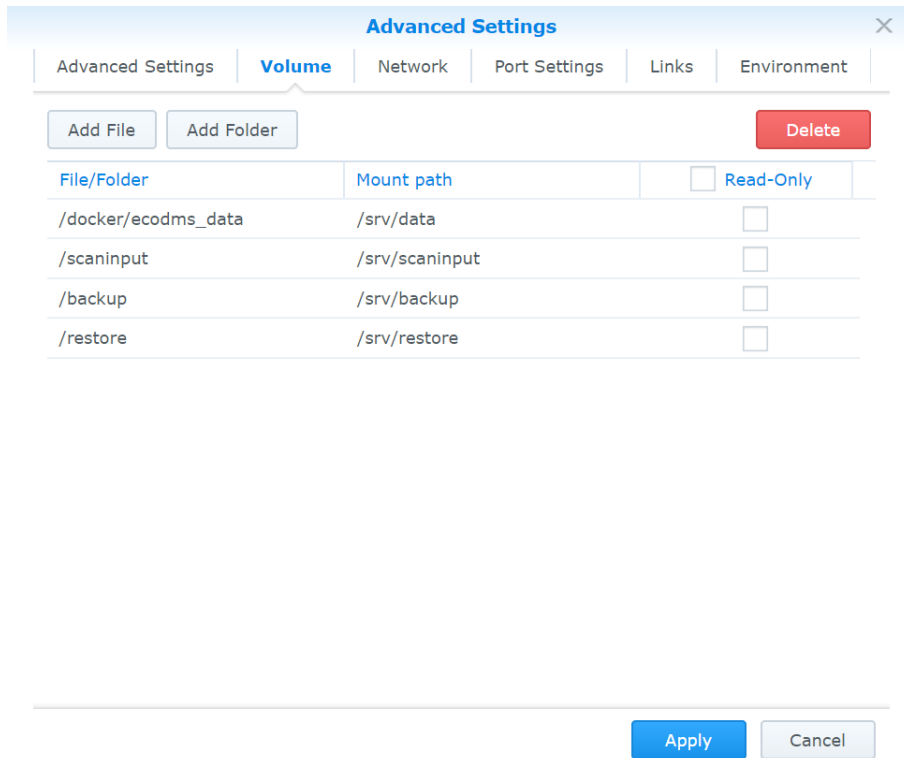
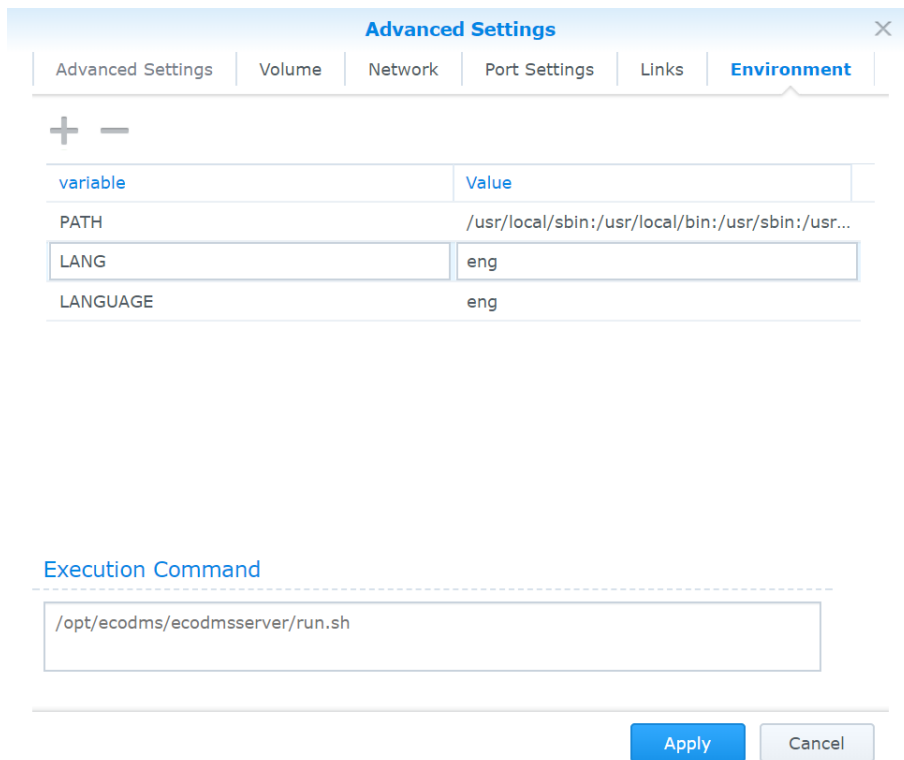


Figure 4.12: Synology - Extended Settings - Volume

4.4.7 Change Language (English)

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

```
LANG=eng
```



The screenshot shows the 'Advanced Settings' window with the 'Environment' tab selected. It features a table for environment variables and an 'Execution Command' field.

variable	Value
PATH	/usr/local/sbin:/usr/local/bin:/usr/sbin:/usr...
LANG	eng
LANGUAGE	eng

Execution Command

```
/opt/ecodms/ecodmsserver/run.sh
```

Buttons: Apply, Cancel

Figure 4.13: Synology - Extended Settings - Change Language (English)

4.4.8 Start Container

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

1. You can connect to ecoDMS via the selected port (here: 17001; refer to the section "Container Settings") at the Synology IP address.
 - a) Enter this address as "Server" in the connection manager.
2. Upon initial starting, it may take a while until the system can access ecoDMS.

Figure 4.14: Synology - Connection Manager - Setup Connection

4.5 QNAP Installation (ecoDMS Server)

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

4.5.1 Create Folder Structure for ecoDMS (Example)

For a standard ecoDMS installation on a NAS you require

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

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

A typical folder structure could look like this:

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

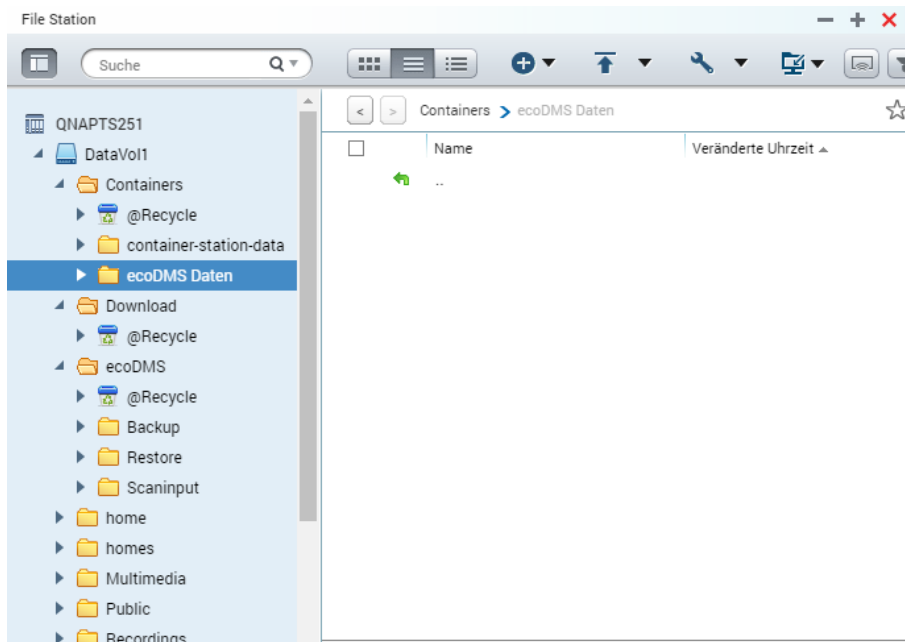


Figure 4.15: QNAP - Folder Structure (Example)

4.5.2 Install & Open ContainerStation

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

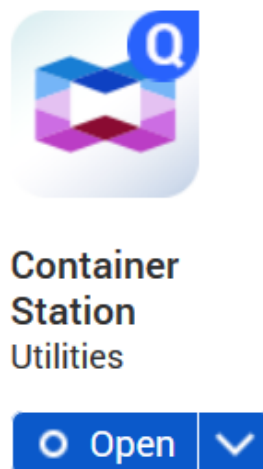


Figure 4.16: QNAP - AppCenter - Install ContainerStation

4.5.3 Search & Install ecoDMS Images

1. In the "Create Container" area of the "Container Station" app, search for the "ecoDMS image" with the name "ecodms/allinone-18.09".
2. Then install the package by clicking "Create".
 - a) **If you have already installed an earlier package, delete the local image "ecodms/allinone-18.09" before installing the new image. Otherwise, "ContainerStation" will install the local image without including any interim updates.**

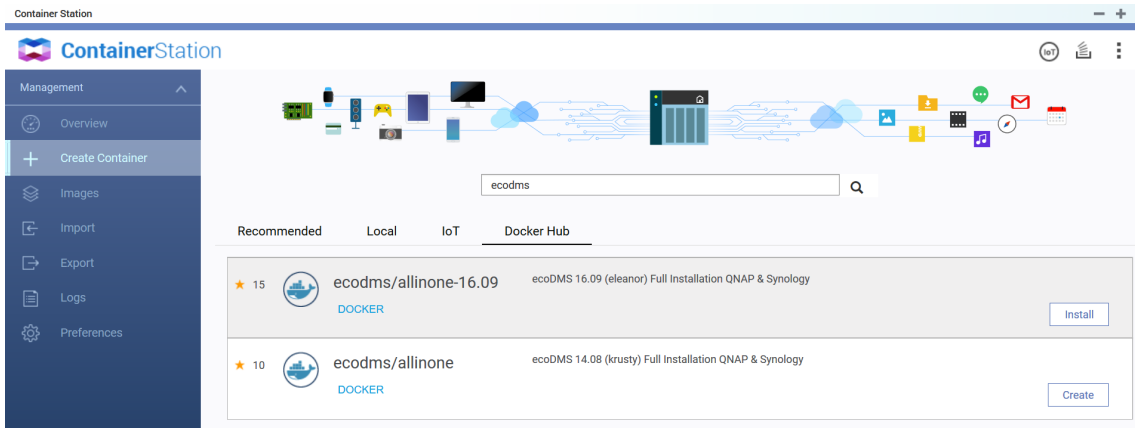


Figure 4.17: QNAP - ContainerStation - ecoDMS Image

4.5.4 Container Settings

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

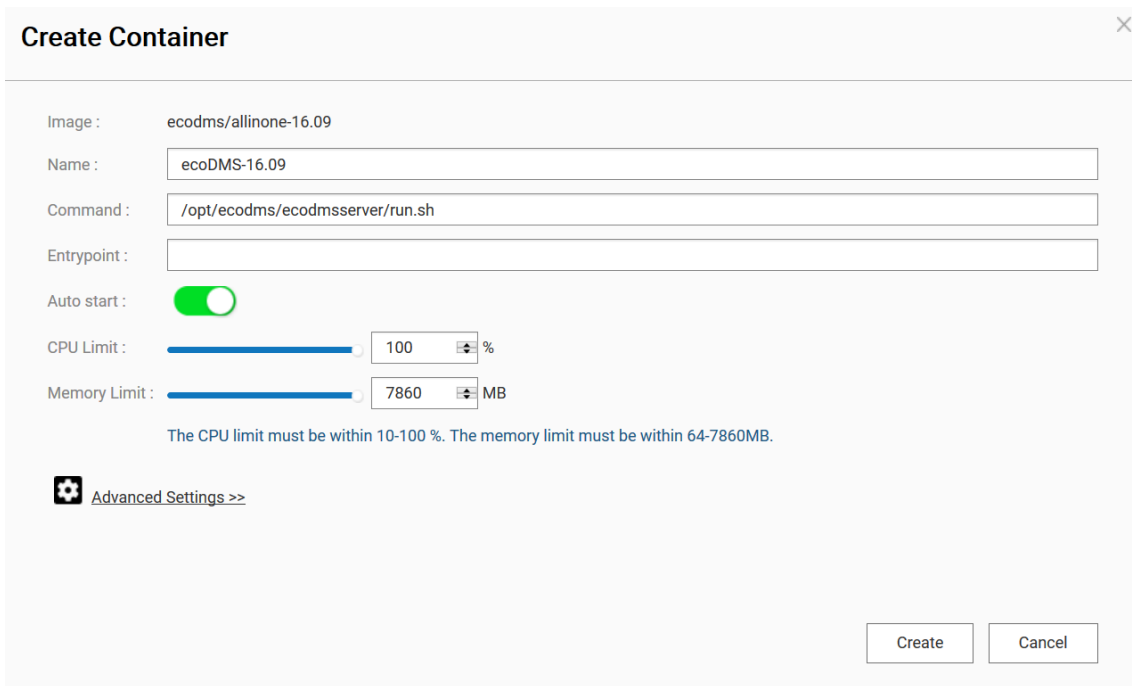


Figure 4.18: QNAP - Assign Container Name

2. Click "Extended Settings".
3. Select the "Network" setting.
4. Now you can make the "Port Settings".

Host	Container
17001	17001
17002	17002
17004	8080
17005	8180

- a) The following figure shows an example for the configuration of "Port Forwarding":
 - i. Container port: 17001 (ecoDMS) → Access via ecoDMS connection manager (17001)

- ii. Container port: 17002 (ecoDMS) → Database access
- iii. Container port: 8080 (web interface) → External access via port 17004
- iv. Container port: 8180 (API) → External access via port 17005

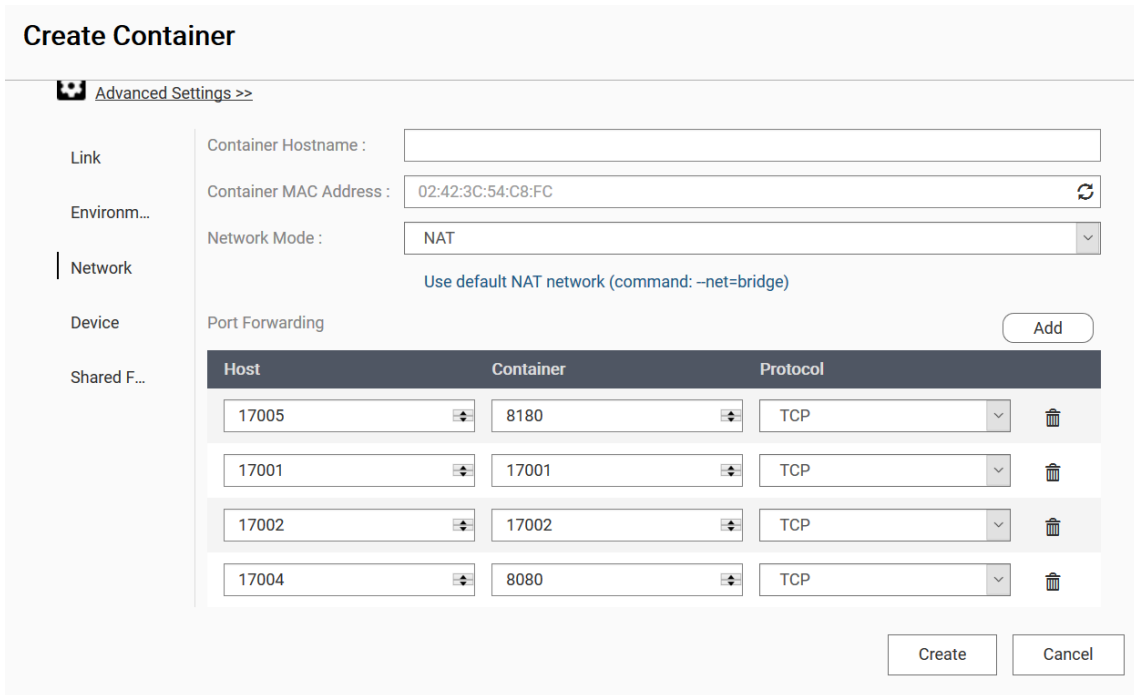


Figure 4.19: QNAP - Port Forwarding (Example)

4.5.5 Configure Mount Paths

1. Select the "Shared Folders" area.
2. Select the location where you want to save your ecoDMS data on the NAS (see figure) in the "Shared Folders" area.
 - a) Please select the directories you created under "Volume from host".

Volume from host	Mount Point
ecodmsdata1809	/srv/data
scaninput1809	/srv/scaninput
backup1809	/srv/backup
restore1809	/srv/restore

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

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

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

Create Container

Advanced Settings >>

Link Add

Environm... No Data

Network

Device Add

Shared F...

Volume from host	Mount Point	Read	Write	
/Container/ecoDMS_data	/srv/data	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
/scaninput	/srv/scaninput	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
/backup	/srv/backup	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
/restore	/srv/restore	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Add

Create Cancel

Figure 4.20: QNAP - Container - Storage Location

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

4.5.6 Change Language (English)

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

```
LANG=eng
```

Create Container

CPU Limit : %

Memory Limit : MB

The CPU limit must be within 10-100 %. The memory limit must be within 64-7860MB.

Advanced Settings >>

Link Add

Environm...

Name	Value	
LANG	eng	
LANGUAGE	de_DE.UTF-8	
LC_ALL	de_DE.UTF-8	
PATH	/usr/local/sbin:/usr/local/bin:/usr/sbin:/usr/bin:/bin	

Create Cancel

Figure 4.21: QNAP - Advanced Container Settings - Change Language

4.5.7 Start Container

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

1. You can connect to ecoDMS via the selected port (here: 17001; refer to the section "Container Settings") at the QNAP IP address.
 - a) Enter this address as "Server" in the connection manager.
2. Upon initial starting, it may take a while until the system can access ecoDMS.

Profile

Profile Name ecoDMS QNAP

Server Enter IP-Address from QNAP Station

Port 17001

Archive

User Settings

User Name ecodms

Password

Search Shortcut Press shortcut

RESET

Connect Automatically

CHECK CONNECTION CANCEL

Figure 4.22: QNAP - Connection Manager - Setup Connection

Important Information for Chapter 4

- [1] *Server und Client können in unterschiedlichen Sprachen installiert werden. Die Anzeige der Klassifizierungsattribute und Meldungen ist allerdings immer abhängig von der Sprachauswahl der ecoDMS Server-Komponente.*

5 macOS

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

5.1 Information

Being a client-server system, ecoDMS Server forms the base of the entire system. To work with ecoDMS under macOS, you must install ecoDMS Server on a separate instance. ecoDMS Server and ecoDMS PDF/A Printer are not on offer for Mac due to the lack of demand. The same applies to the MS Office plugin, for which the interfaces on the Microsoft side are not complete in a macOS - version. In this case, however, you can use the OpenOffice and LibreOffice add-ons. We recommend you install ecoDMS Server under Windows, Ubuntu, Debian (for example, on a virtual machine) or on a supported NAS device. Then you can access the server with the macOS client and set up a connection via the Connection Manager. Access via Web Client is also possible.

5.2 Upgrade

If you want to upgrade to version 18.09 (apu) from an earlier version, you must uninstall all ecoDMS components completely from your macOS system first.

5.3 Installation

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

5.3.1 ecoDMS Clients

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

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

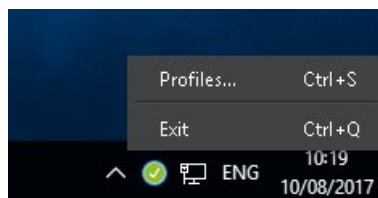


Figure 5.1: Exit Connection Manager

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

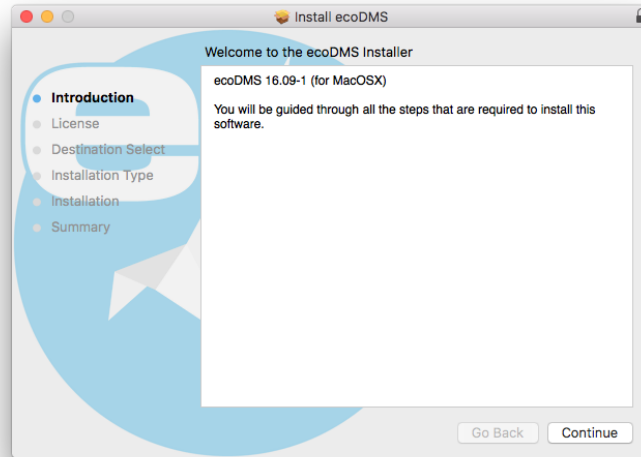


Figure 5.2: macOS Client: Introduction

6. The next steps are the language and the license agreements.
 - a) Select the language in the "License" Window. You will find a selection box above the license terms.
 - i. You can install server and client in different languages.
 - ii. The display of the classification attributes and messages depends, however, on the language selection of the ecoDMS Server component.
 - b) Read the license agreement carefully and click "Continue".

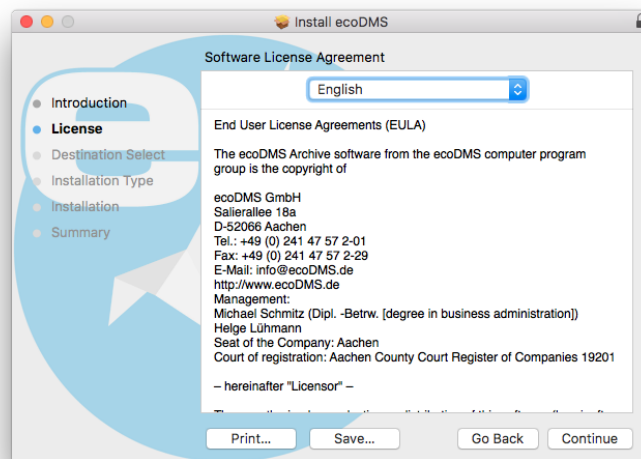


Figure 5.3: macOS Client: Language and License

7. Confirm the license agreement with "Agree".

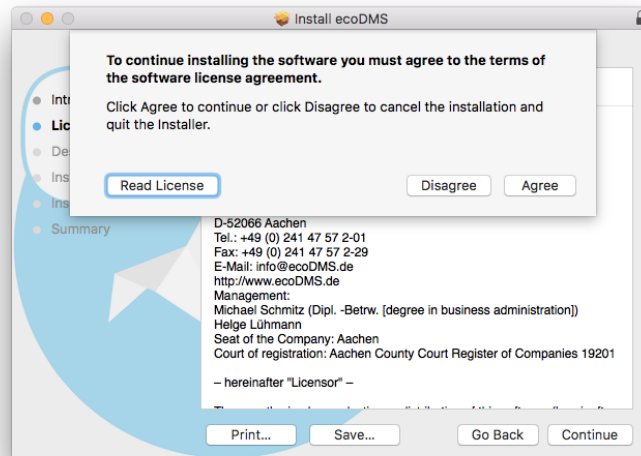


Figure 5.4: macOS Client: Accept License Agreement

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



Figure 5.5: macOS Client: Installation Disk

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

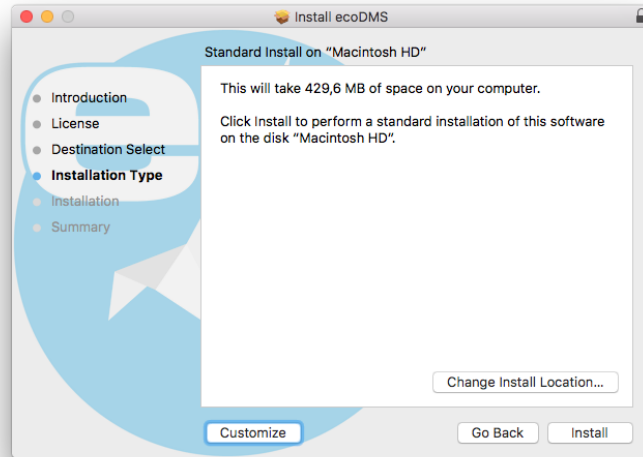


Figure 5.6: macOS Client: Installation

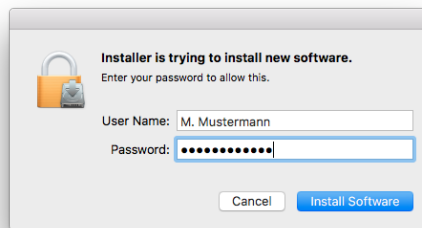


Figure 5.7: macOS Client: Enter Access Data

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

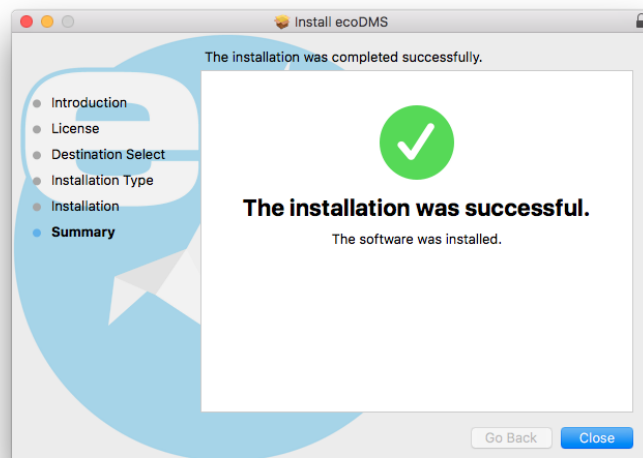


Figure 5.8: macOS Client: Installation Complete

5.4 Uninstall

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

5.4.1 ecoDMS Client

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

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

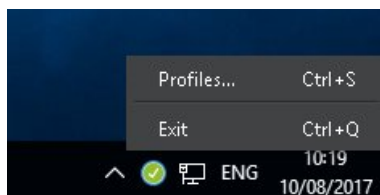


Figure 5.9: Exit Connection Manager

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

Important Information for Chapter 5

- [1] *Erstellen Sie vor einem Update/Upgrade unbedingt ein Backup. Sollten Sie von einer Vorgängerversion auf das aktuelle Major Release upgraden, befolgen Sie bitte die Upgrade-Schritte im neueren Installationshandbuch. Bei einem einfachen Update des gleichen Major Releases können Sie die Software einfach drüber installieren. Es müssen stets alle Komponenten aktualisiert werden. Vermischen Sie auf keinen Fall die Komponenten einer früheren ecoDMS Version mit dieser Version. Nach einem Upgrade ist ein Downgrade zu einer älteren ecoDMS Version nur möglich, wenn von der Vorgängerversion ein vollständiges Backup vorliegt.*
- [2] *Server und Client können in unterschiedlichen Sprachen installiert werden. Die Anzeige der Klassifizierungsattribute und Meldungen ist allerdings immer abhängig von der Sprachauswahl der ecoDMS Server-Komponente.*

6 Login

The ecoDMS manuals describe all functions, setup and login, including the required login credentials.

1. Login

The ecoDMS manuals describe all functions, setup and login, including the required login credentials.

- a) **New ecoDMS installation (no update)**: If this is your first login after installing ecoDMS, you can find the login credentials for the default user in the ecoDMS manual (chapter: Login Credentials) for the
Desktop client Connection and login via Connection Manager
Web client Connection via web service and login via internet browser. The web service is automatically started after a new ecoDMS installation, but the administrator can also start and stop the service manually at any time.
- b) **Update / upgrade with existing database**: If this is an update or an upgrade, the existing settings are accepted.
Desktop client Connection and login via Connection Manager
Web client To use the Web Client, the web service must be started. Moreover, the user requires a system permission to use the Web Client (ecoSIMSWEBCLIENT). Login through the internet browser.

7 Plugins and Addons

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

7.1 Installation

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

7.1.1 Microsoft Office Plugin

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

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

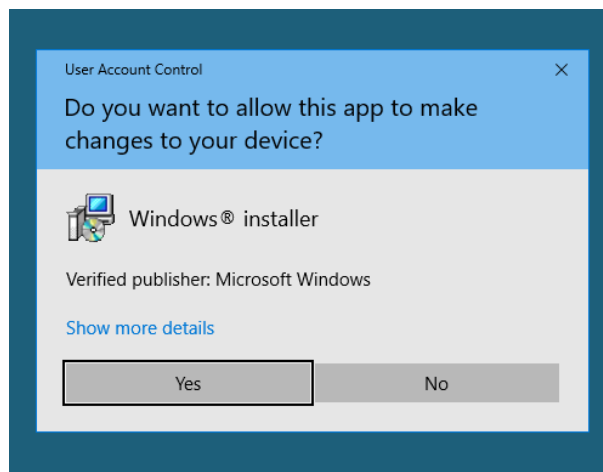


Figure 7.1: Windows Confirmation Prompt - MS Office Plugin

6. In the first step you must accept the license agreement for Microsoft .NET Framework.
 - a) To do so, click "I accept."
 - b) If this Framework is already installed on your computer, the setup skips this step.

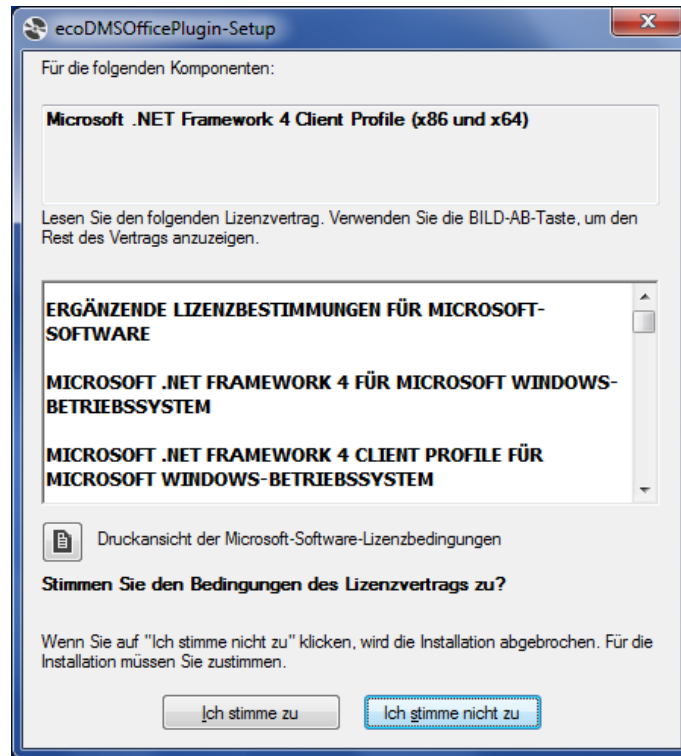


Figure 7.2: MS Office Plugin - License: Framework

7. The "Framework" installation follows.
 - a) This process may take a while.
 - b) If this "Framework" is already installed on your computer, the setup skips this step.

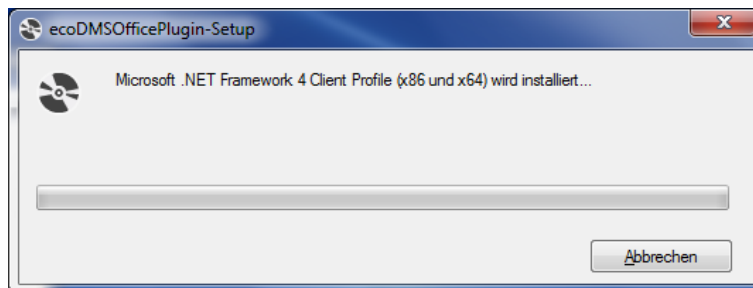


Figure 7.3: MS Office Plugin - Installation Framework

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

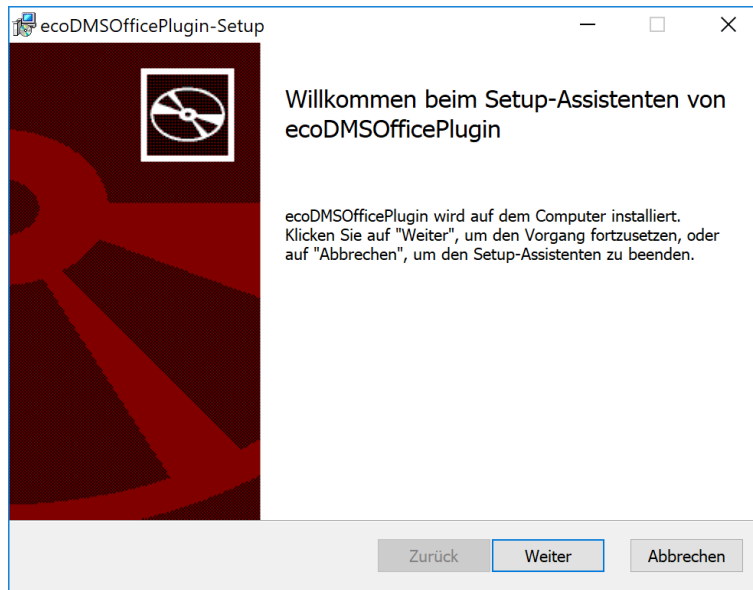


Figure 7.4: MS Office Plugin - Start Setup Wizard

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

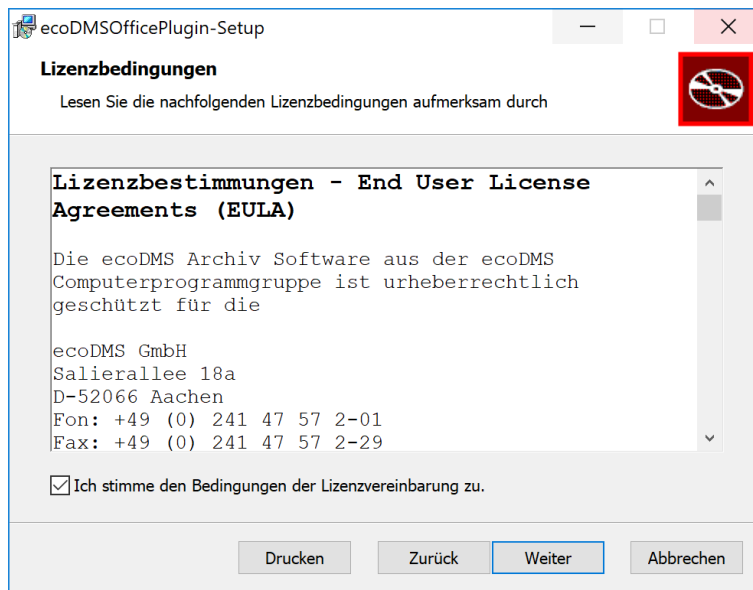


Figure 7.5: MS Office Plugin - ecoDMS License Agreement

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

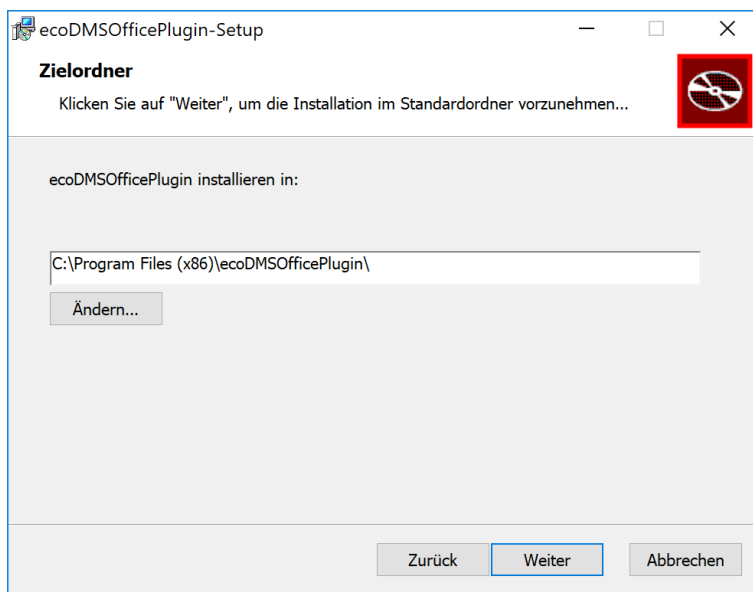


Figure 7.6: MS Office Plugin - Installation Destination

11. Click "Install" to start the installation.

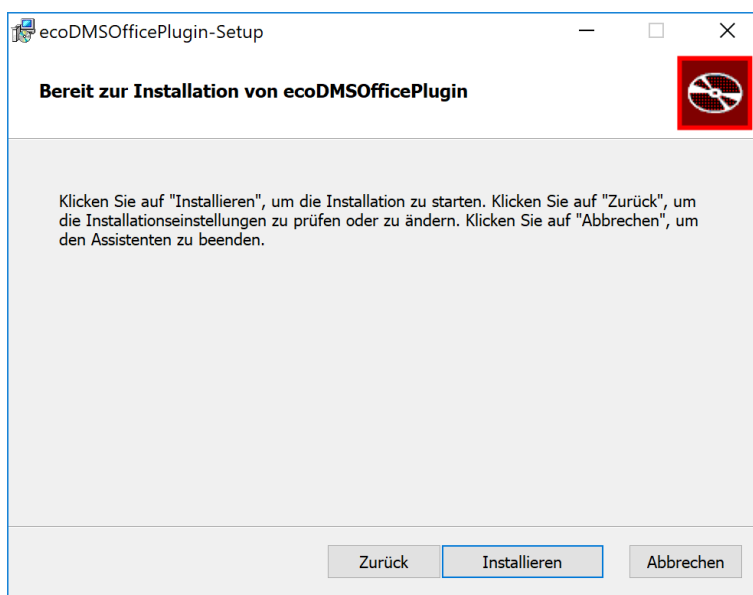


Figure 7.7: MS Office Plugin - Start Installation

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

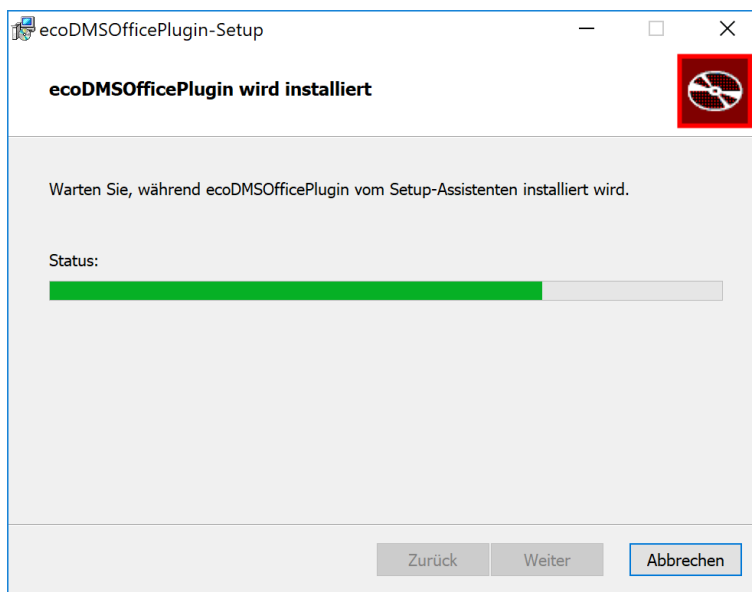


Figure 7.8: MS Office Plugin - Installation

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

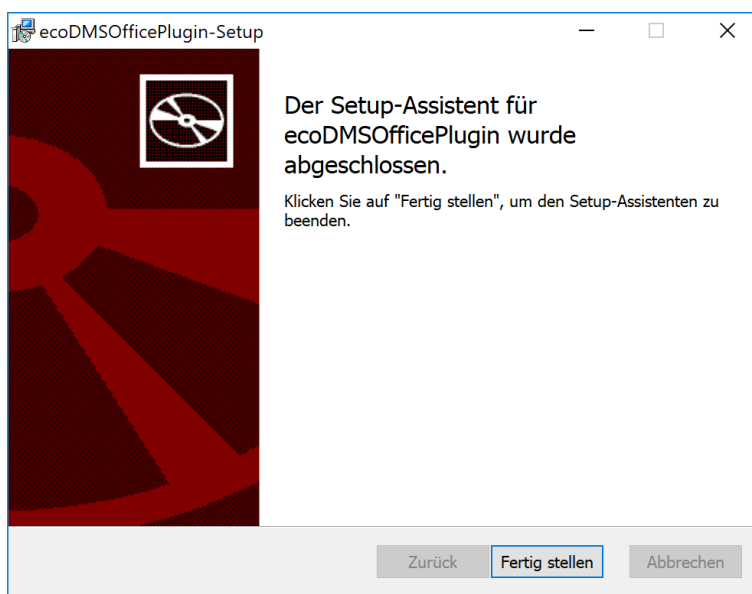


Figure 7.9: MS Office Plugin - Finish Installation

14. You can restart the MS Office programmes now.

7.1.2 Libre- & OpenOffice Addon

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

7.1.2.1 Java Activation

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

1. Start one of the Office Programs.
2. Tools -> Options

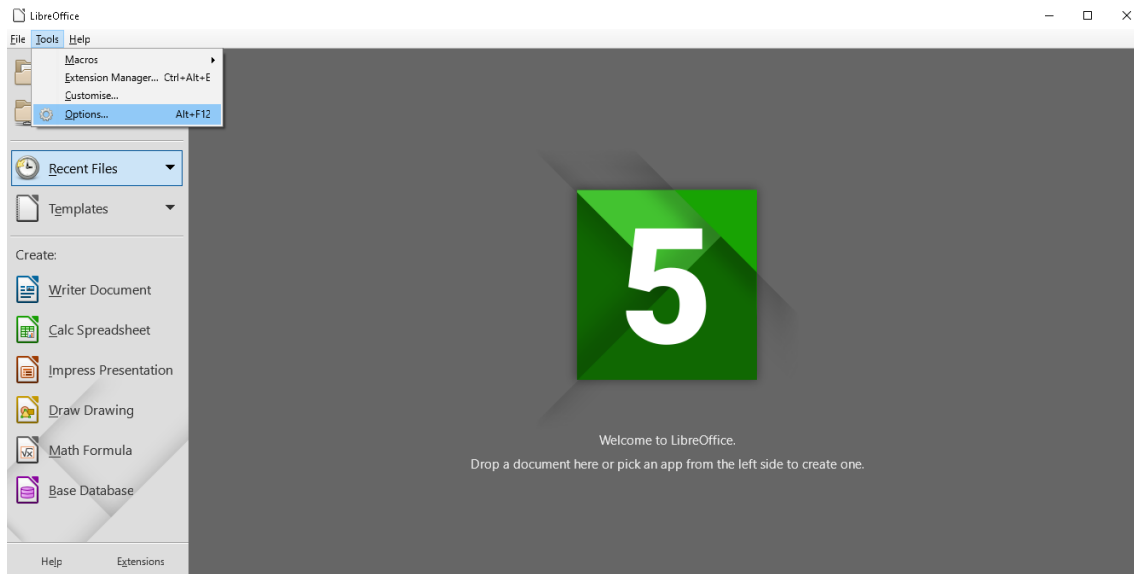


Figure 7.10: LibreOffice - Tools - Options

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

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

6. Confirm the message with "OK".

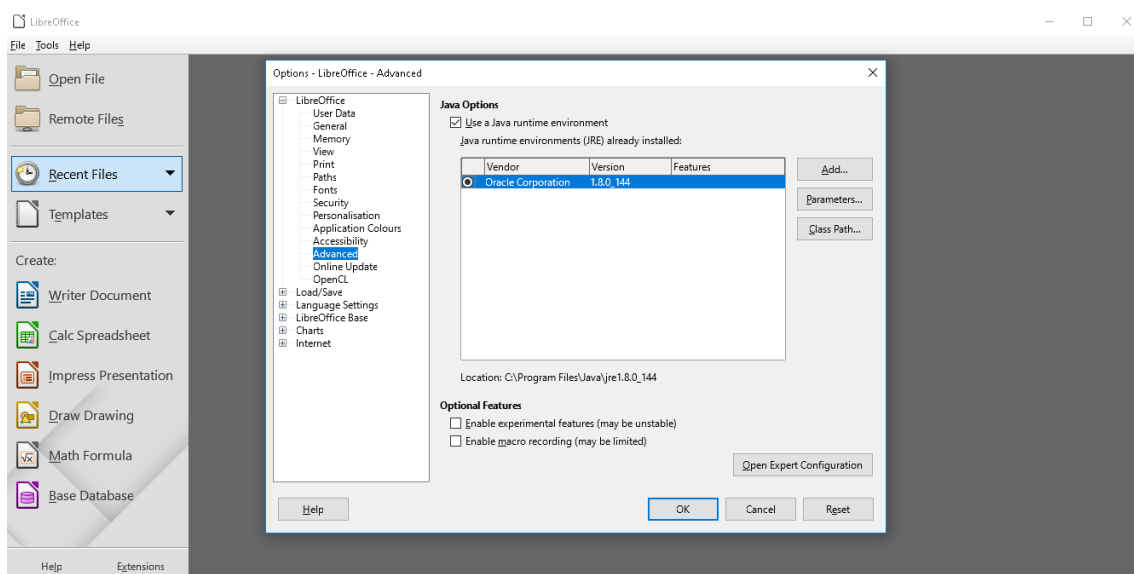


Figure 7.11: Enable Java in Office

7.1.2.2 Install Addon

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

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

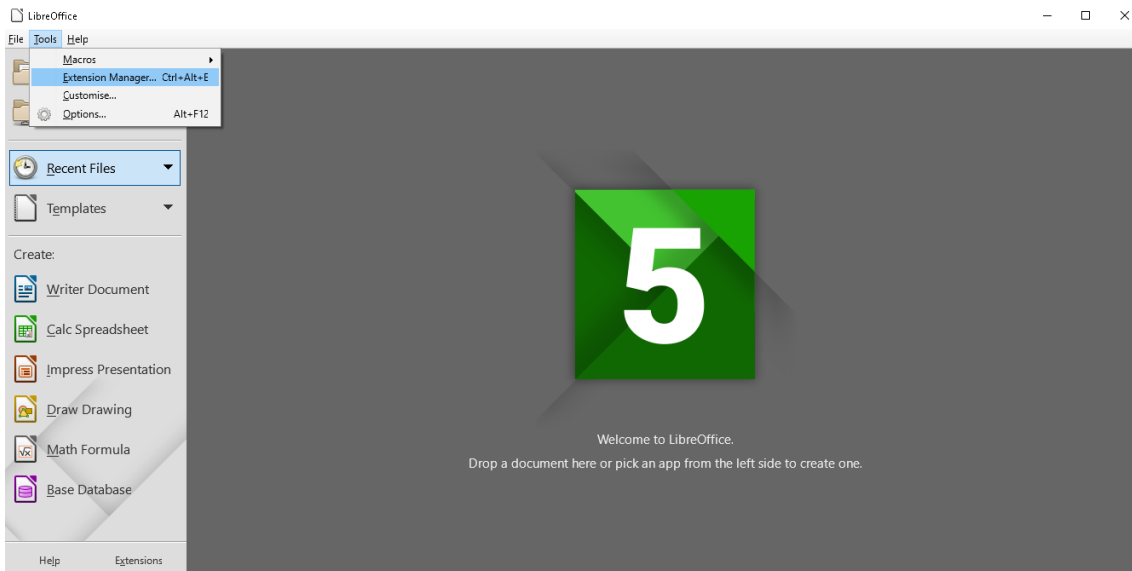


Figure 7.12: LibreOffice: Extras -> Extension Manager

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

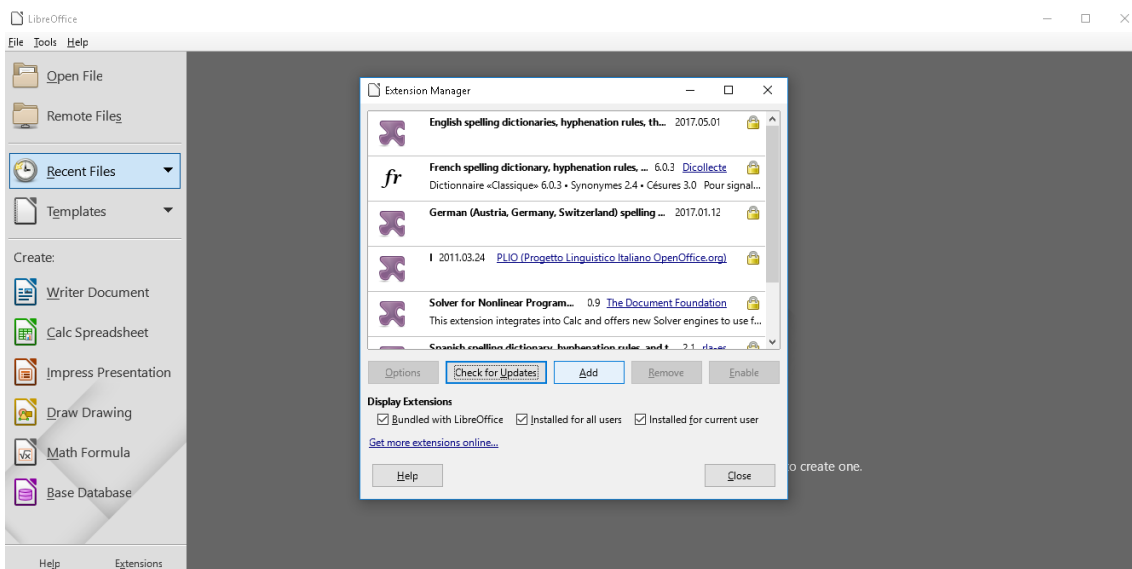


Figure 7.13: LibreOffice: Extension Manager

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

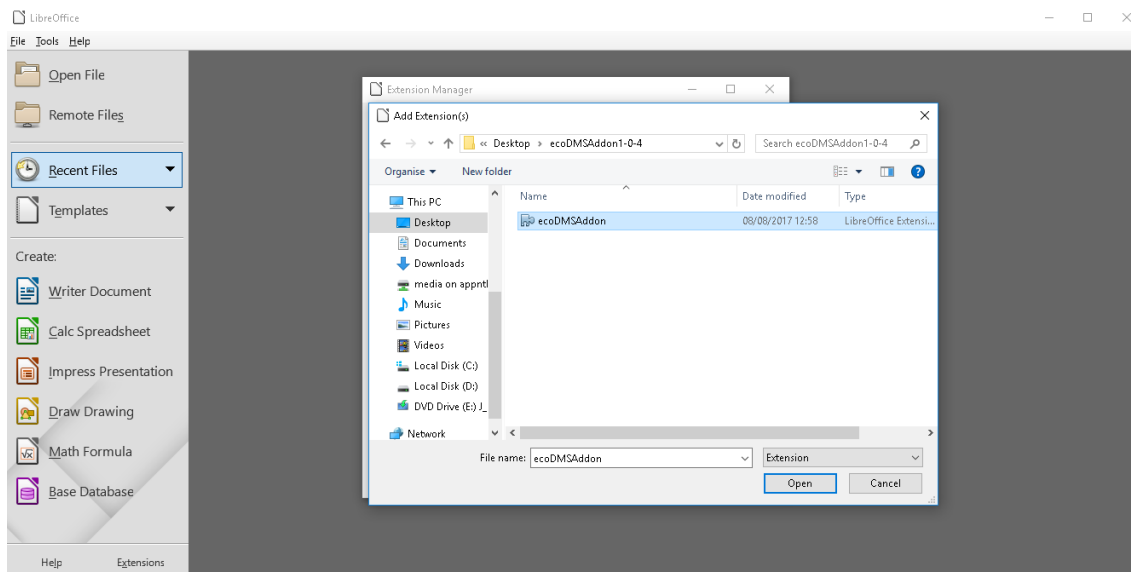


Figure 7.14: LibreOffice: Extension Manager - Select File

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

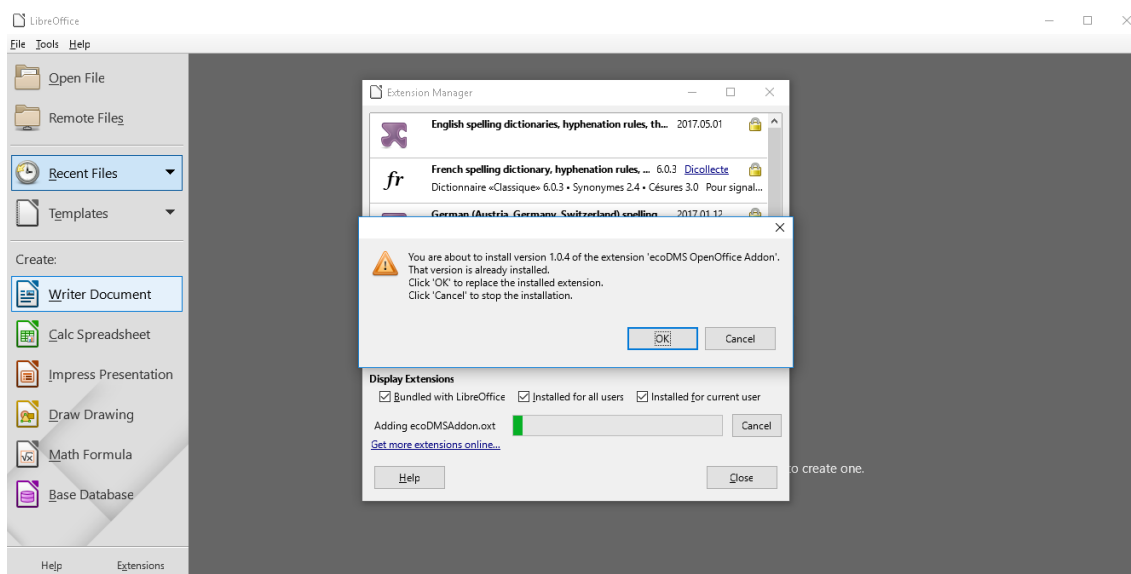


Figure 7.15: Confirmation Prompt: User Environment

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

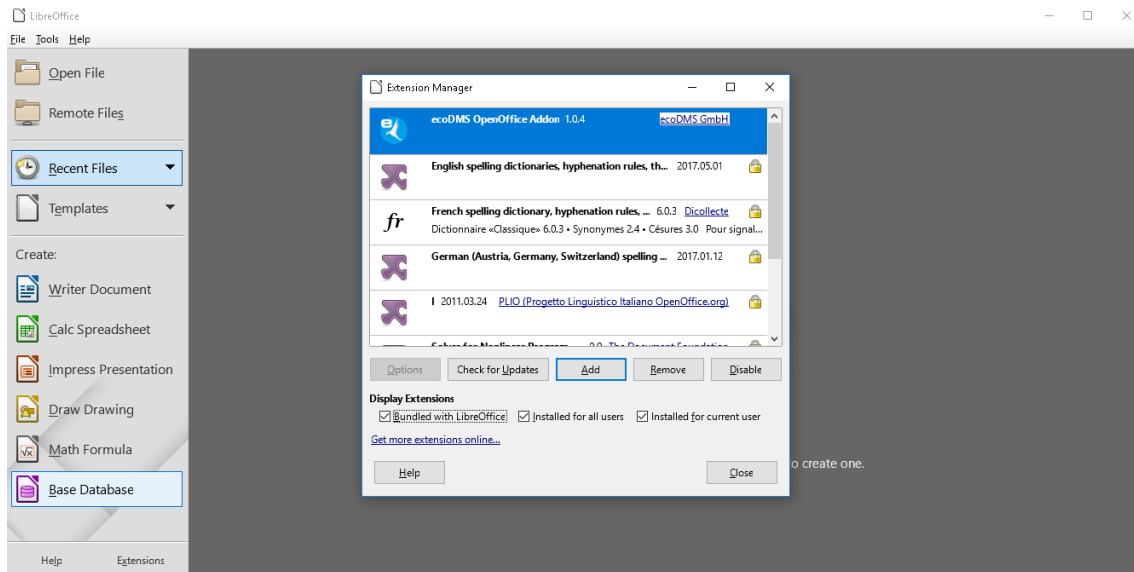


Figure 7.16: LibreOffice: Installation Complete

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

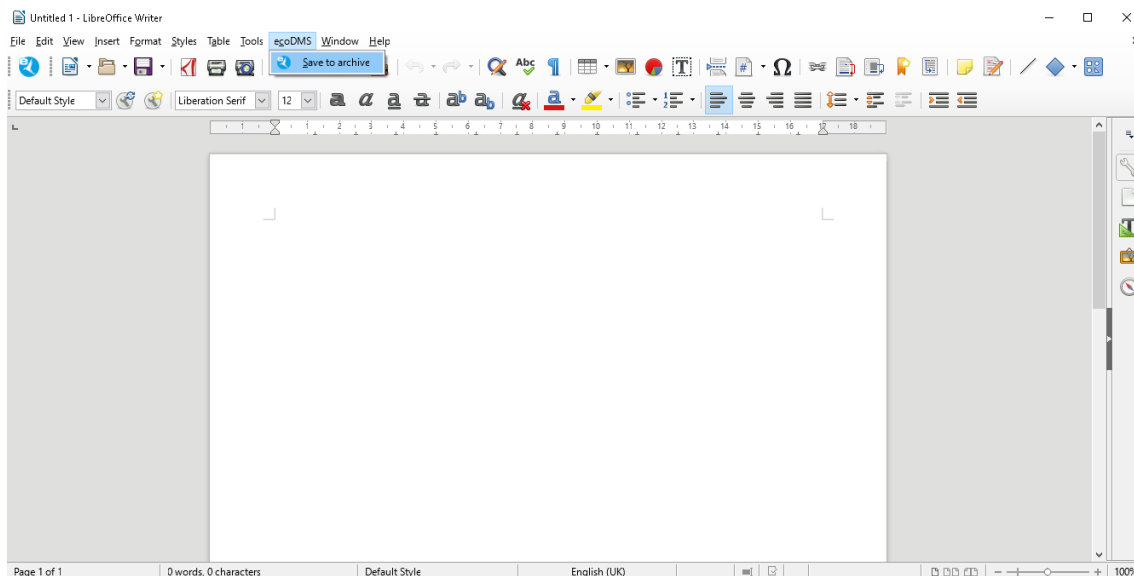


Figure 7.17: LibreOffice: ecoDMS Addon (here: Writer)

7.1.3 Thunderbird Addon

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

1. Download the file for the Thunderbird Addon at ecodms.de.
 - a) Please also note: The Thunderbird add-on requires the latest version of the ecoDMS Printer.
2. If this is a ZIP-file, unzip it first.
3. Start Thunderbird.

4. Click "Menu - Tools - Addons".

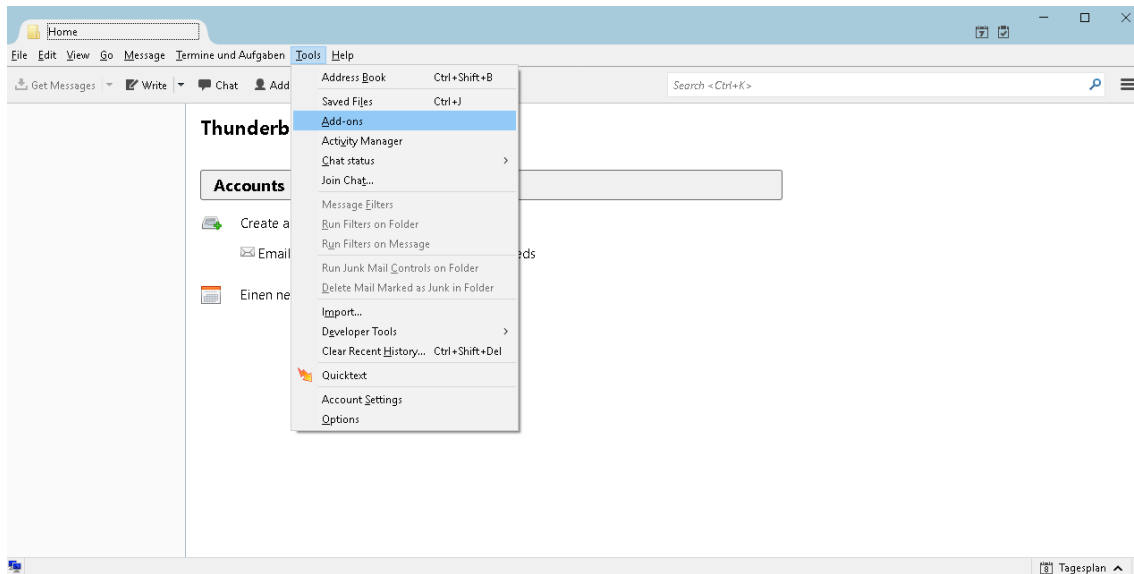


Figure 7.18: Thunderbird: Tools -> Add-ons

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

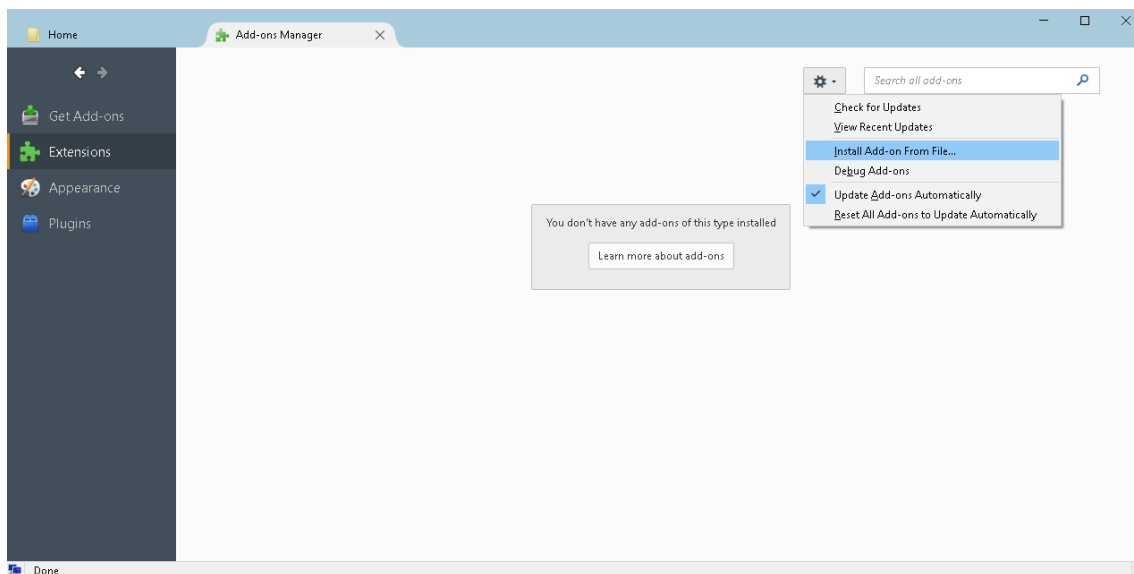


Figure 7.19: Thunderbird: Install Addon from File

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

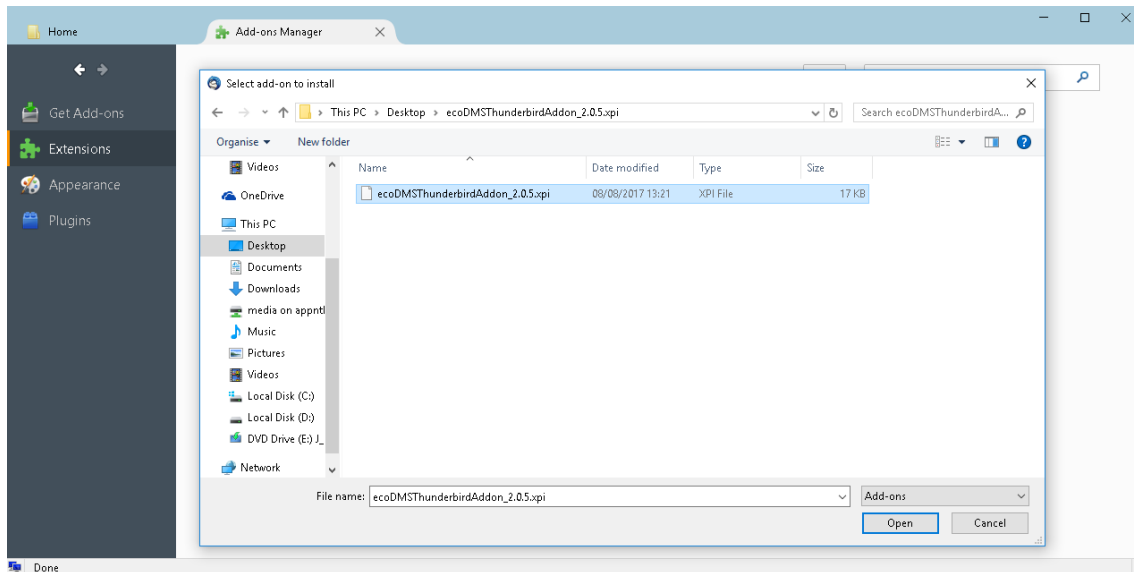


Figure 7.20: Thunderbird: Select Addon

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

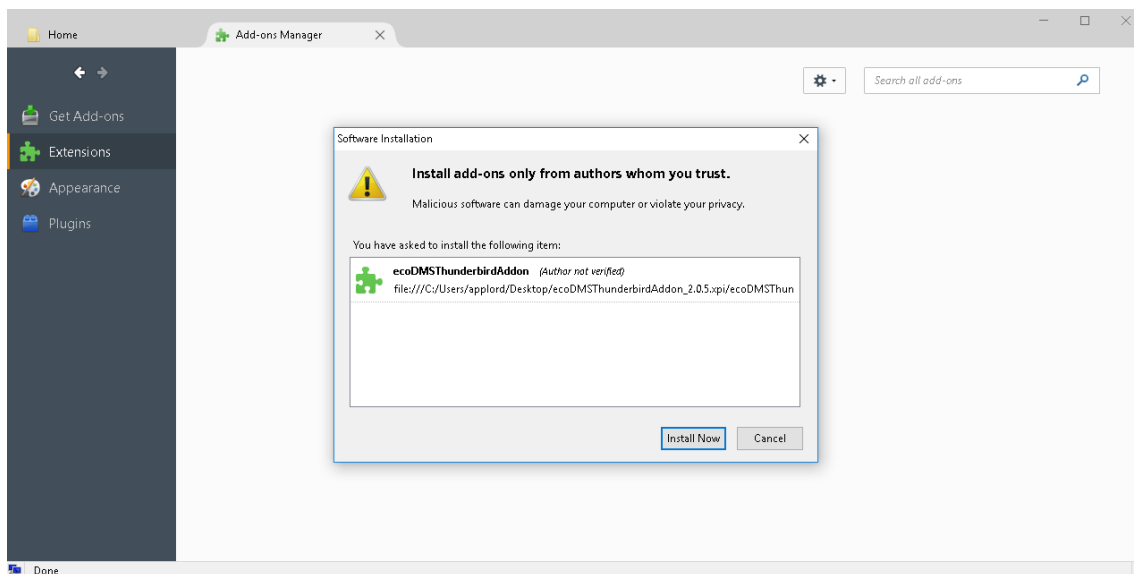


Figure 7.21: Thunderbird: Confirmation Prompt

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

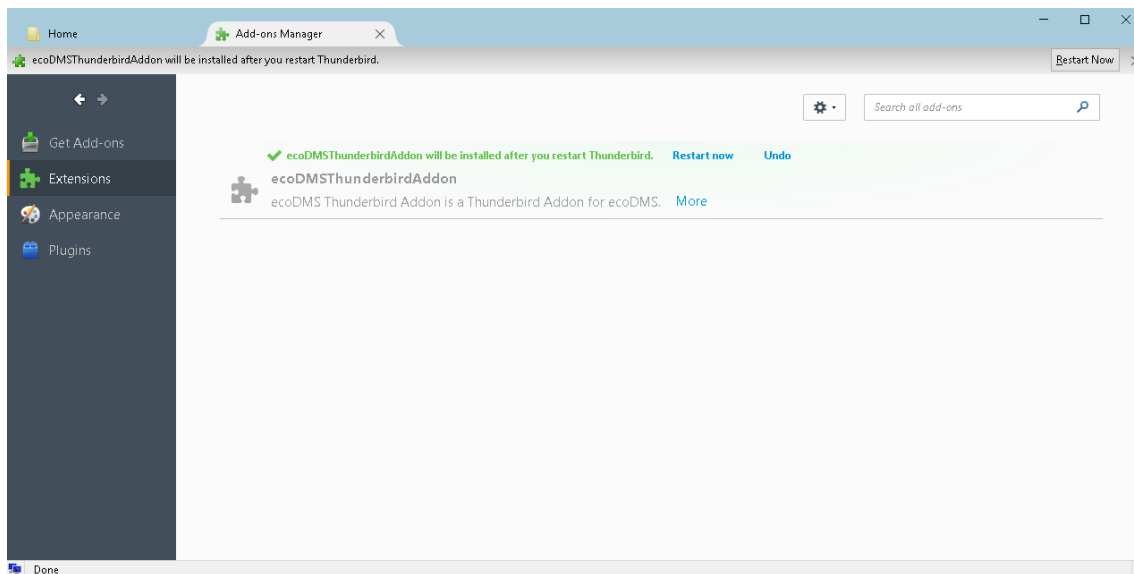


Figure 7.22: Thunderbird: Restart

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

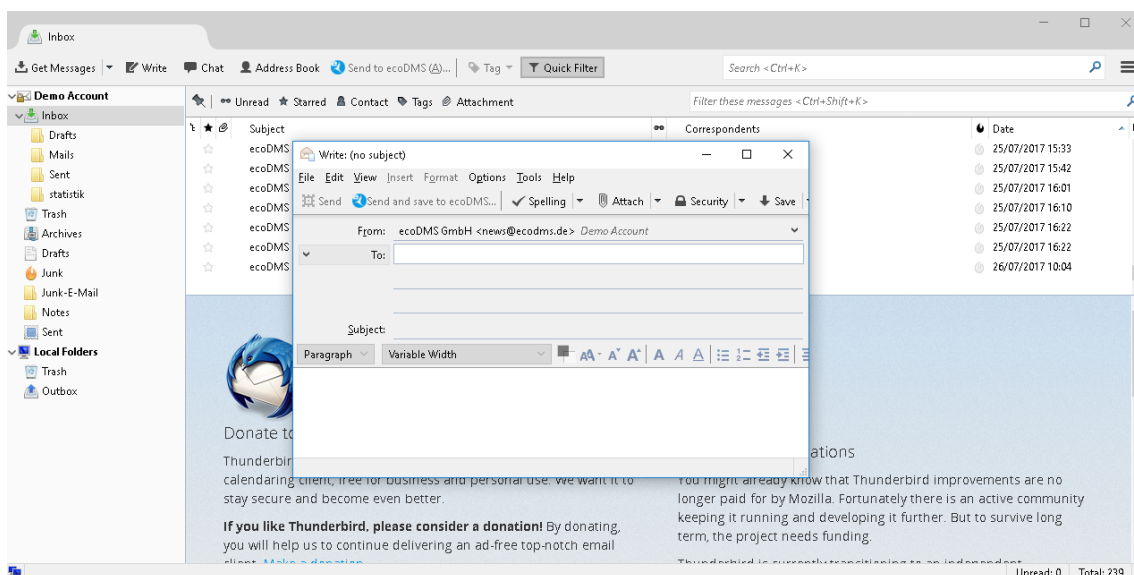


Figure 7.23: Thunderbird: ecoDMS Addon in the mail client

7.1.4 ecoMAILZ Plugin (1.0.2) for ecoDMS Version 18.09 (apu) | Windows

- To use the ecoMAILZ Plugin in ecoDMS, you require a valid license of the current ecoDMS full version. Moreover, the ecoDMS PDF/A Printer must be installed according to the official system requirements of the Plugin.
- The Plugin is installed on the client and not on the server.
- Install the Plugin locally at each required workstation.
- Close all ecoDMS applications on your desktop and also exit the ecoDMS Connection Manager.

Use this file to install the ecoMAILZ Plugin for the ecoDMS client. The following describes the installation under Windows.

1. Download the file for the ecoDMS Plugin at ecodms.de.
2. If this is a ZIP-file, unzip it first.
 - a) The ecoMAILZ Plugin for ecoDMS consists of 2 files.
 - i. `ecodmsmailzplugin.edp`
 - A. This is the actual Plugin for ecoDMS.
 - B. The default language of the Plugin is English.
 - ii. `ecodmsmailzplugin_de.qm`
 - A. This is the German language file for the ecoDMS Plugin.
3. Copy the Plugin file and - if you require the German language - the German language file directly into the Plugin folder of the ecoDMS client on your file system.
 - a) The "Plugins" folder is located in the selected target folder of your ecoDMS client installation. For example:

C:\Program Files\ecoDMS GmbH\ecoDMS Client\Plugins

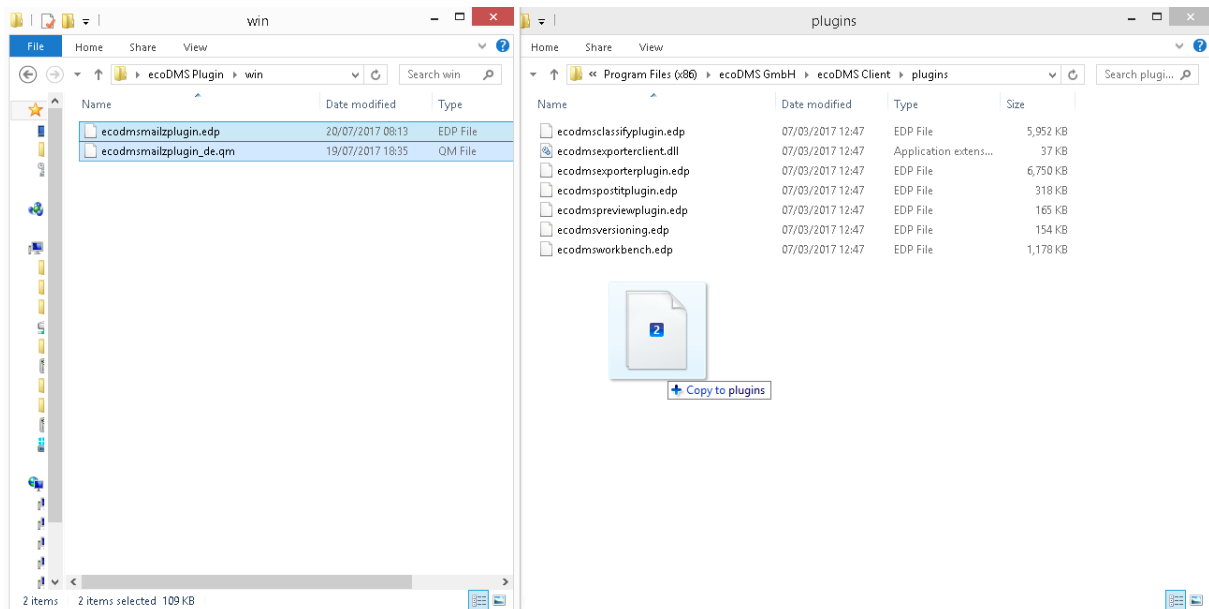


Figure 7.24: ecoMAILZ-ecoDMS Plugin - Copy Files into the ecoDMS Plugin Folder

4. Adding files to the ecoDMS folder requires administrator permission. Confirm the following Windows confirmation prompt with "Continue".

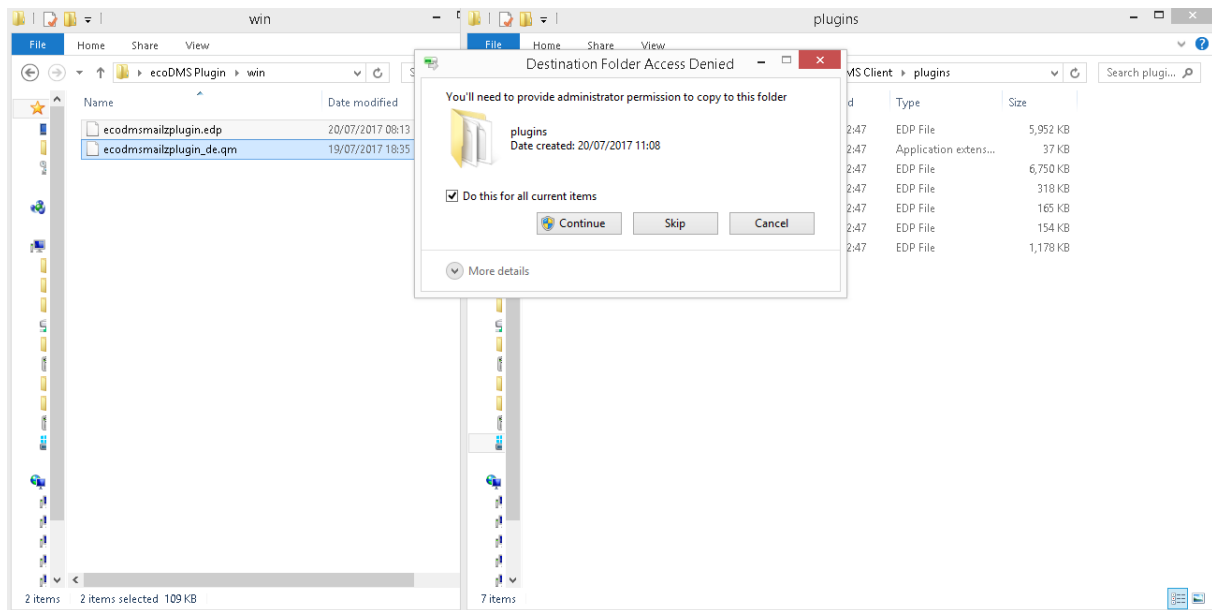


Figure 7.25: Install ecoMAILZ-ecoDMS Plugin - Copy files into the ecoDMS Folder

5. The files are now copied to the folder. This process may take a while.
6. Now you can restore the connection with the ecoDMS server via the Connection Manager.
7. Start the ecoDMS client in order to work with the Plugin.
 - a) When you open the ecoDMS client, the ecoMAILZ window prompts you to make the necessary settings.
 - b) You can also open the Settings dialogue box in the ecoDMS client through the "Plugins - ecoMAILZ" menu item.
 - i. **ecoMAILZ Url:** Enter the link to your ecoMAILZ system. The link usually consists of the IP address of the ecoMAILZ instance and the associated port.

`http://ecoMAILZ_IP_ADDRESS:Port`

Example for a local installation with default port:

`http://localhost:8888`
 - ii. **ecoMAILZ User:** Enter the username of your ecoMAILZ profile / your email address configured in ecoMAILZ.
 - iii. **ecoMAILZ Password:** Enter the password associated with the username here.
 - iv. Confirm your entries with "OK" or abort the process with "Cancel".

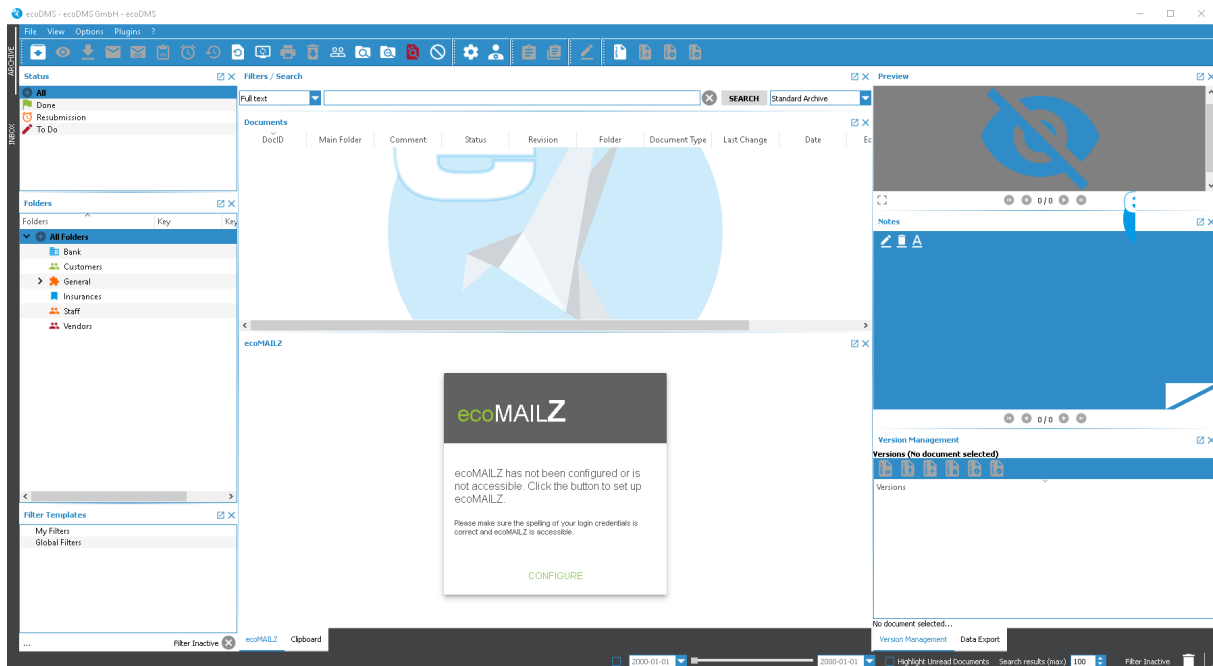


Figure 7.26: Install ecoMAILZ-ecoDMS Plugin - Display in ecoDMS (Configuration Prompt)

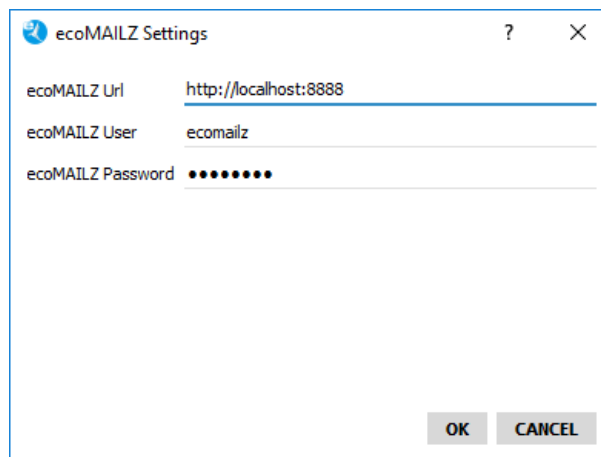


Figure 7.27: ecoMAILZ Plugin in ecoDMS - ecoMAILZ Settings (Local Installation)

7.1.5 ecoMAILZ Plugin (1.0.2) für ecoDMS Version 18.09 (apu) | Linux

- To use the ecoMAILZ Plugin in ecoDMS, you require a valid license of the current ecoDMS full version. Moreover, the ecoDMS PDF/A Printer must be installed according to the official system requirements of the Plugin.
- The Plugin is installed on the client and not on the server.
- Install the Plugin locally at each required workstation.
- Close all ecoDMS applications on your desktop and also exit the ecoDMS Connection Manager.

ecoMAILZ Plugin for the ecoDMS Document Management System

You can find the entry for the sources.list of the ecoMAILZ plugin, which you can install for your ecoDMS (document management system), in the Linux Chapter from the ecoDMS installation manual. The entries comply with the ecoDMS installation. If you have already installed ecoDMS, you do not need to update this entry. You can start installing the ecoMAILZ plugin for ecoDMS straight away.

Use this installation steps to install the ecoMAILZ Plugin for ecoDMS.

1. A precondition for this installation is that the apt-sources were edited as described in this manual.
 - a) Please read the description in the chapter "Linux Distributions - Installation".
2. Open the console.
3. Start the installation with

```
sudo apt-get install ecodmsmailzplugin
```

4. Confirm the displayed questions / warnings with YES by entering Y [...]Do you want to continue?[...] [...]Do you want to install these packages without checking?[...]
 - a) This process may take a while.
5. Read the license agreement carefully and confirm them.
 - a) Use the Tab key to skip to "OK" and confirm with "Enter".
6. The installation is performed. This operation may take a while.

7.2 Uninstall

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

7.2.1 Microsoft Office Plugin

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

1. Exit all Office applications.
2. Select Programs -> "ecoDMS Office Plugin" in the control panel.
3. Use the "Uninstall" function.
4. During the uninstallation, the firewall might inquire whether the application is allowed to access the network. Confirm with "Yes".

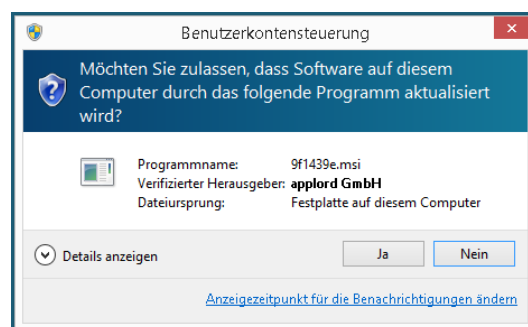


Figure 7.28: User Account Control – MS Office Plugin

5. The uninstallation is prepared and then executed. This operation may take a while.

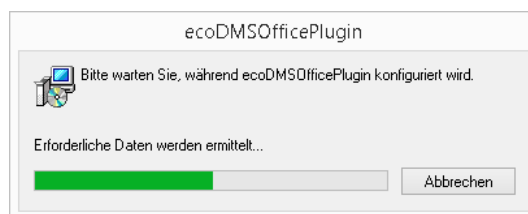


Figure 7.29: MS Office Plugin - Uninstallation: Preparation & Execution

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

7.2.2 Libre- & OpenOffice Addon

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

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

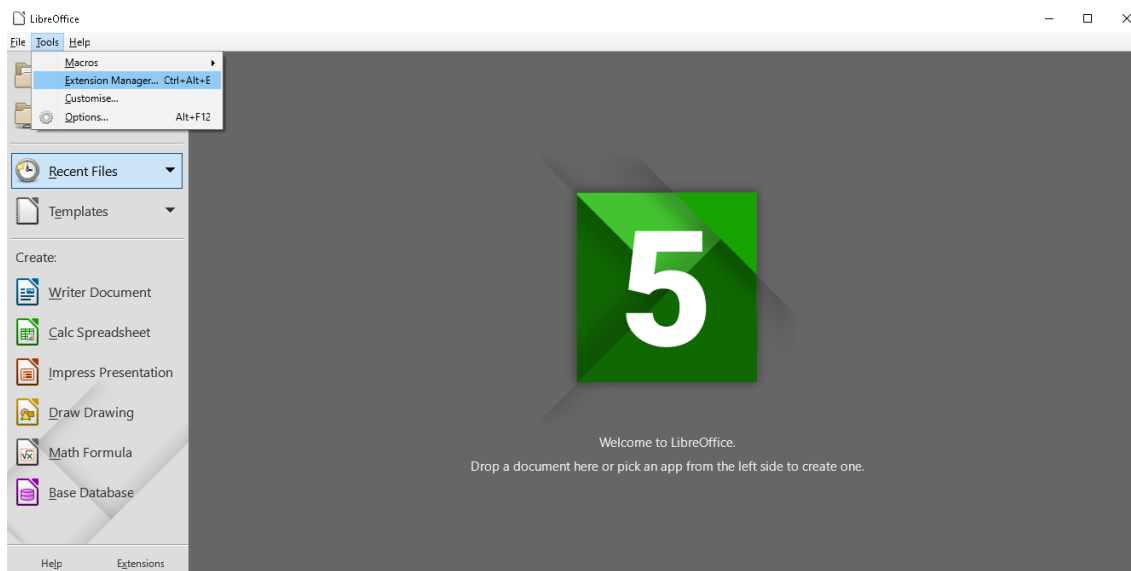


Figure 7.30: LibreOffice: Extras -> Extension Manager

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

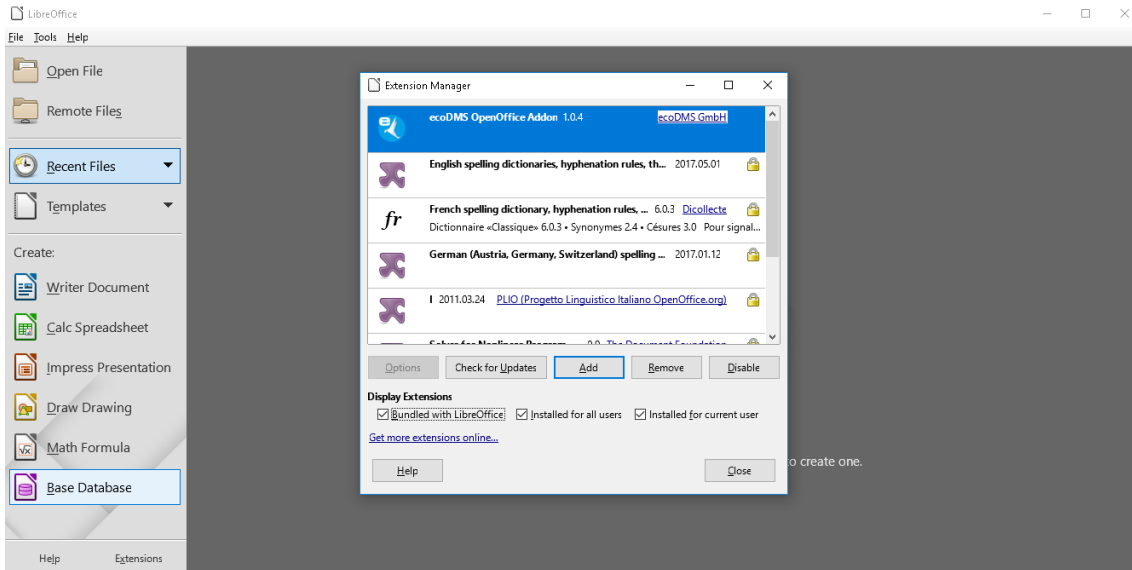


Figure 7.31: LibreOffice: Extension Manager

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

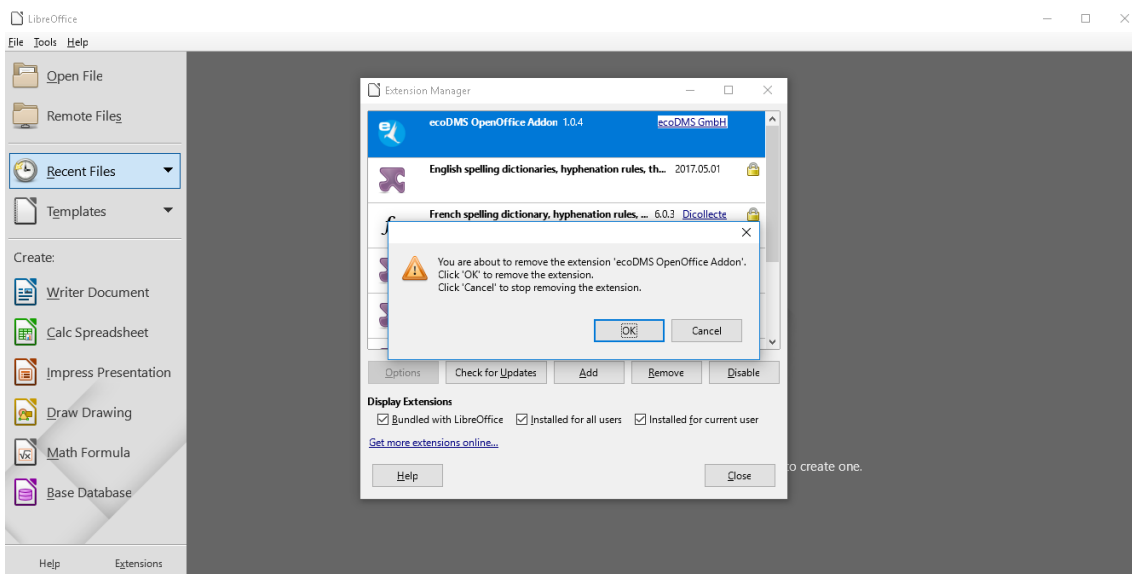


Figure 7.32: Confirmation Prompt for Uninstallation

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

7.2.3 Thunderbird Addon

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

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

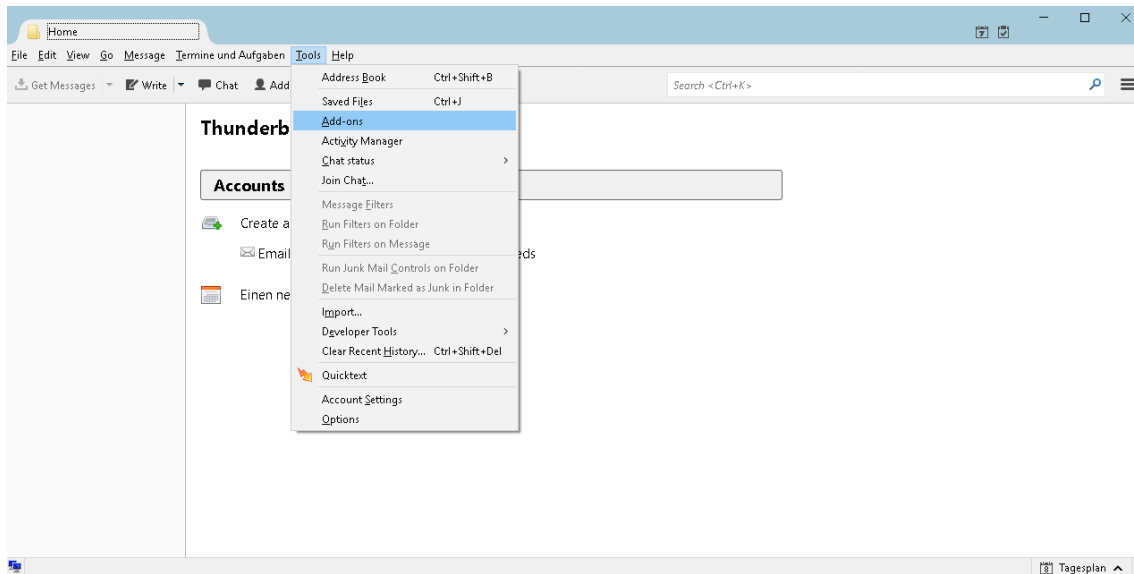


Figure 7.33: Thunderbird: Extras -> Addons

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

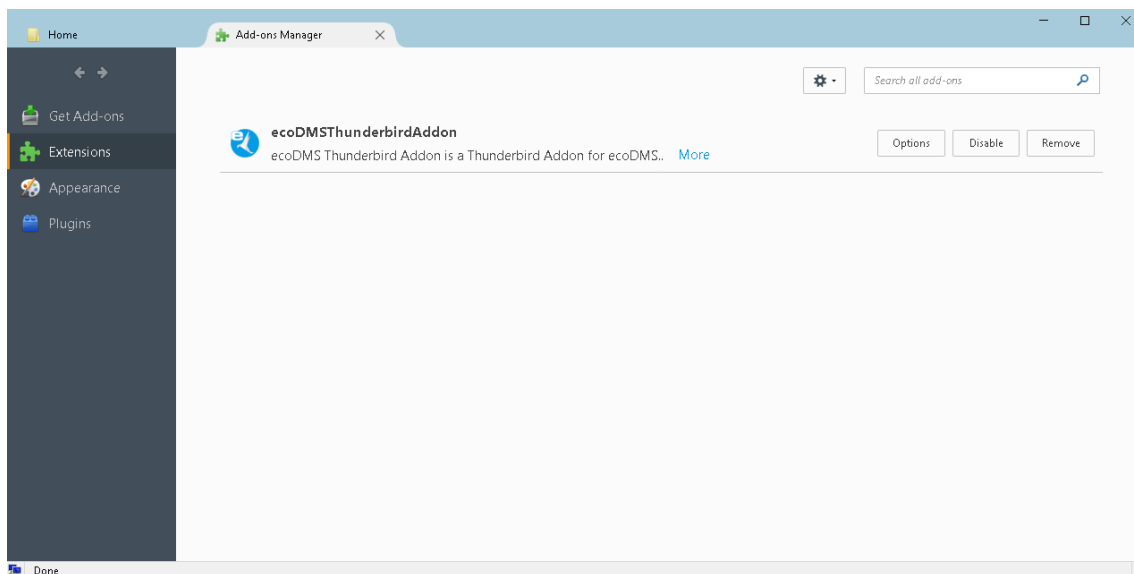


Figure 7.34: Thunderbird: Uninstall Addon

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

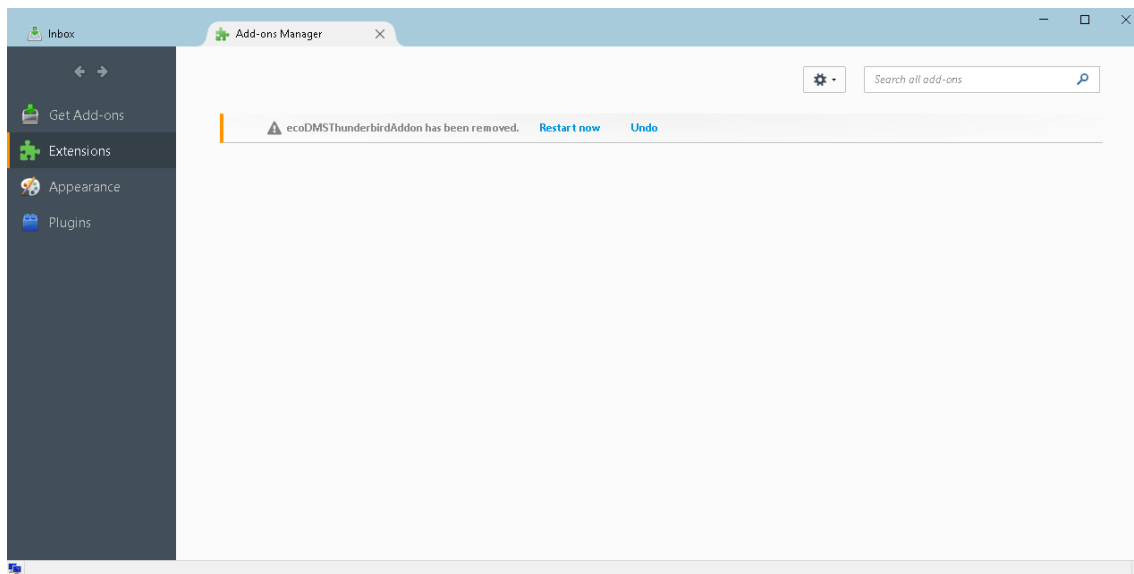


Figure 7.35: Thunderbird: Restart

Important Information for Chapter 7

- [1] Bei der Installation ist es möglich, dass die Firewall eine Nachfrage stellt, ob die Anwendung auf das Netzwerk zugreifen darf. Bestätigen Sie dies mit Ja.
- [2] Erstellen Sie vor einem Update/Upgrade unbedingt ein Backup. Sollten Sie von einer Vorgängerversion auf das aktuelle Major Release upgraden, befolgen Sie bitte die Upgrade-Schritte im neueren Installationshandbuch. Bei einem einfachen Update des gleichen Major Releases können Sie die Software einfach drüber installieren. Es müssen stets alle Komponenten aktualisiert werden. Vermischen Sie auf keinen Fall die Komponenten einer früheren ecoDMS Version mit dieser Version. Nach einem Upgrade ist ein Downgrade zu einer älteren ecoDMS Version nur möglich, wenn von der Vorgängerversion ein vollständiges Backup vorliegt.
- [3] Server und Client können in unterschiedlichen Sprachen installiert werden. Die Anzeige der Klassifizierungsattribute und Meldungen ist allerdings immer abhängig von der Sprachauswahl der ecoDMS Server-Komponente.
- [4] Voraussetzung zur Verwendung dieses Plugins ist die Installation der aktuellsten Software-Komponenten von ecoDMS Server, ecoDMS Client und ecoDMS PDF/A Drucker.

7.2.4 ecoMAILZ Plugin (1.0.2) for ecoDMS Version 18.09 (apu) | Windows

- The Plugin is uninstalled on the client and not on the server.
- Uninstall the Plugin locally at each required workstation.
- Close all ecoDMS applications on your desktop and also exit the ecoDMS Connection Manager.

To uninstall the ecoMAILZ Plugin for ecoDMS on your desktop computer, complete the following steps:

1. Open the Plugin folder of the ecoDMS client on your file system.
 - a) The "Plugins" folder is located in the selected target folder of your ecoDMS client installation. For example:

```
C:\Program Files\ecoDMS GmbH\ecoDMS Client\Plugins
```

2. Now remove the following files from the Plugin folder:

- a) `ecodmsmailzplugin.edp`
 - i. This is the actual Plugin for ecoDMS.
 - A. The default language of the Plugin is English.
 - ii. `ecodmsmailzplugin_de.qm`
 - A. This is the German language file for the ecoDMS Plugin.
 - B. This file is only available in the folder if the Plugin was installed in the German language.
3. Removing files from the ecoDMS folder requires administrator permissions. Confirm the Windows confirmation prompt with "Continue".
4. The files are now removed from the folder. This process may take a while.
5. Now you can restart the connection manager and use the available ecoDMS applications.

7.2.5 ecoMAILZ Plugin (1.0.2) for ecoDMS Version 18.09 (apu) | Linux

- The Plugin is uninstalled on the client and not on the server.
- Uninstall the Plugin locally at each required workstation.
- Close all ecoDMS applications on your desktop and also exit the ecoDMS Connection Manager.

The following explains the uninstall process of the ecoMAILZ Plugin for ecoDMS under Linux distributions.

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

```
sudo apt-get remove ecodmsmailzplugin
```

8 Backup & Restore

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