ecoDMS Version 18.09 (apu)

MANUAL

Features

Imprint

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Important Information

Contents

1 Quick Start

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

1.1 Install ecoDMS

- ecoDMS is a client-server system. To start, install all necessary ecoDMS components. The basic system elements are ecoDMS Server, ecoDMS Client including Inbox and Connection Manager, and the virtual PDF/A Printer. As an option, there are various additional components for email clients and Office applications.

- As a client-server system, ecoDMS Server forms the base of the entire system. The postgreSQL database and containers for storing all data and information are also part of the server installation. The services available for the ecoDMS API REST service and web service (Web Client) are also contained in the server. The server is not a piece of hardware, but a software component.
    - One installation of ecoDMS Server is installed on a central computer, a server hardware or an NAS.
    - You can then install ecoDMS Client and additional components on any number of other supported devices.
    - The system can be installed as a single-seat solution (server, client and additional functions on one computer) and as a network solution with access to the server from various end devices.

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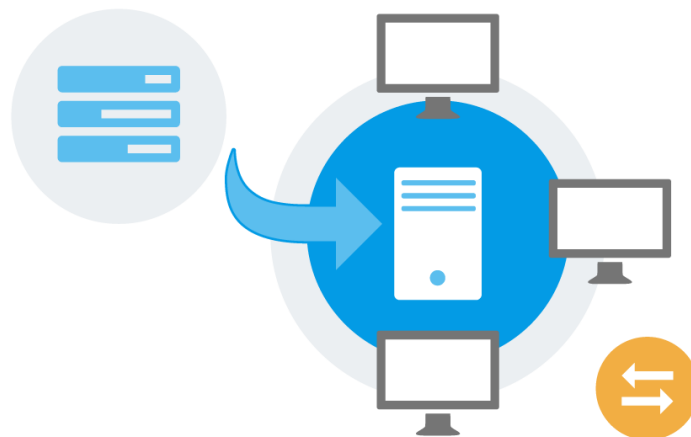
Figure 1.1: Quick Start - Install ecoDMS

1.2 Login

In order to use the system, login with your user credentials.

- On the client, login through the Connection Manager.
    - The Connection Manager is installed automatically with ecoDMS Client. The Connection Manager establishes the connection between the Desktop Clients and Plugins and ecoDMS Server.
- To use the Web Client, you do not need to be connected through the Connection Manager.
    - The web service must be started through the settings dialogue in ecoDMS Client.

Use the default user of ecoDMS when you first log in to the system (desktop and web client). The default user is automatically created with the first installation of the ecoDMS environment. The default user has all necessary system permissions to use and set up the system.

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

- User: ecodms

- Password: ecodms

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

The following figure shows example settings for the Connection Manager on a single seat local installation.
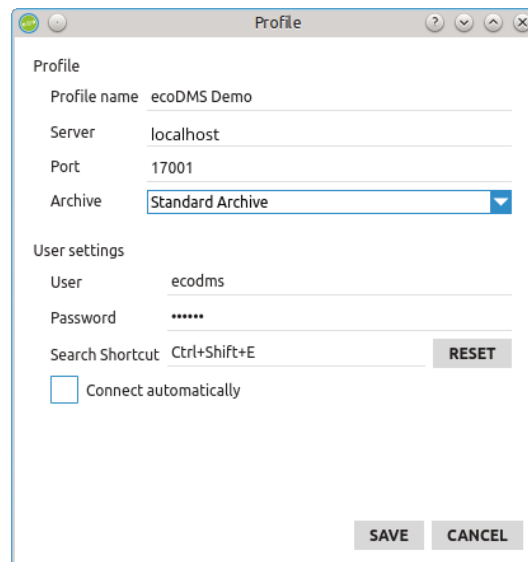
Figure 1.2: Connection Manager - Example Settings for Local Installation (Single Seat)
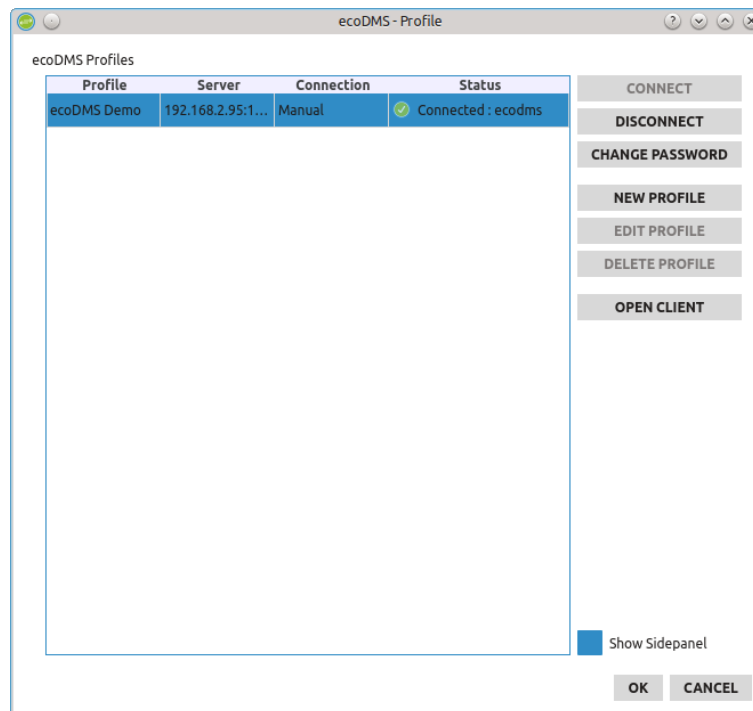
Figure 1.3: Connection Manager - Example Profile for Local Installation

1.3 System Setup

You can setup ecoDMS according to your requirements.

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

 – Via the settings dialogue, you as an administrator can set the necessary folder structures, document types and much more.

 – Please note the following when setting up ecoDMS:

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

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

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

Figure 1.4: Quick Start - Configuration

1.4 Scan & Archive Documents

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

- Archiving via Desktop Client (drag & drop and function call)

- Archiving via Web Client through an internet browser from your PC, laptop, tablet or smart phone (drag & drop and function call)

- Scanning and archiving (inbox) documents via TWAIN/WIA/SANE or scaninput folder Archiving via side panel

- Archiving documents via virtual PDF/A printer

- Archiving files via Plugins and Plugins

1.4.1 Scan Process

To archive your paper documents, you need a scanner and the ecoDMS inbox.

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

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

3. If after scanning the dark process (automatic classification and archiving) is not enabled, all scanned documents are retrieved one after the other via the ecoDMS inbox and prepared for archiving. As soon as the files have been classified and archived, authorised users can access them in ecoDMS.

4. Via the classification you can assign the virtual folder in ecoDMS, the document type, the status, the permissions and meta data for each document. You can use this information and the full-text search to retrieve documents and save them together with further details. The classification can be done either manually by the user or automatically through classification templates.

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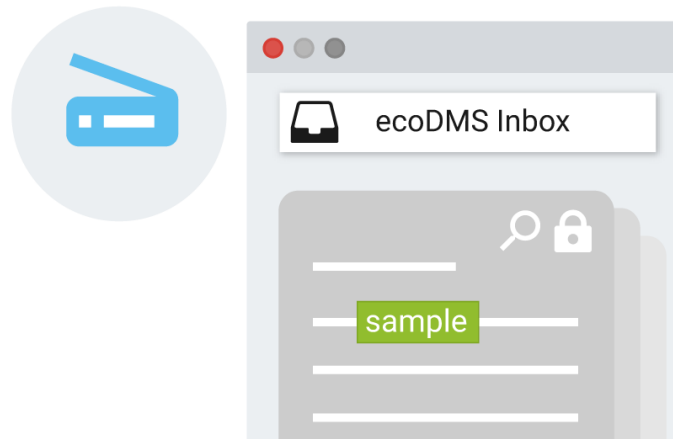
Figure 1.5: Quick Start - Scan Documents

1.4.2 Archive & Classify Digital Files

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

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

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

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

Figure 1.6: Quick Start - Archive Digital Documents

2 License Activation

- To activate a license in the ecoDMS settings, you need an internet connection. If you do not have an internet connection on your computer (ecoDMS Server), you can activate the license manually on the ecoDMS website from another device.

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

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

- If you cannot deactivate the license according to the instructions in the ecoDMS manual because, for example, you did not deactivate your license as described above, you can request ecoDMS GmbH to reset (deactivate) your license. For this case the "Support" section of the ecoDMS website provides a free form.

The purchased ecoDMS license is activated and managed by the administrator through the ecoDMS settings dialogue. On the License in the Settings, you can display and manage your license information.
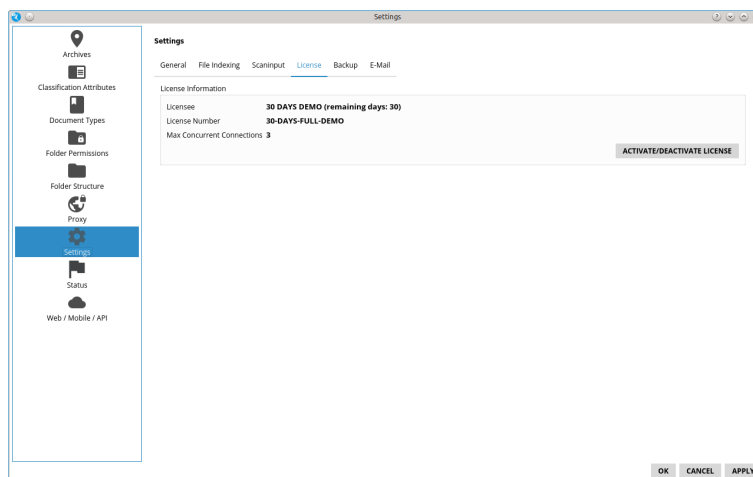
Figure 2.1: Settings - Settings - License (Here: Trial)
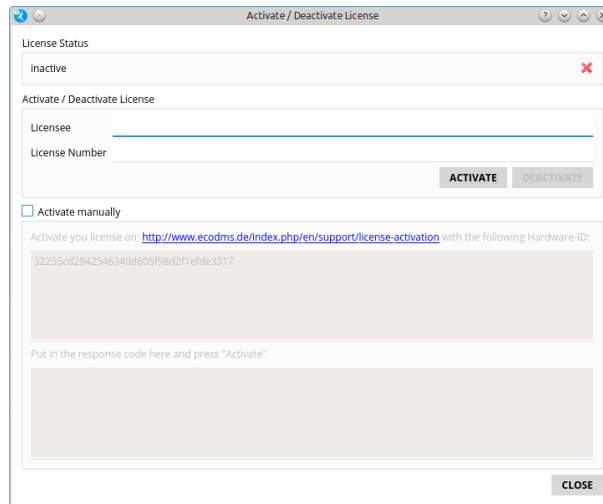
Figure 2.2: Settings- Settings - License Activation

2.1 Activate License via Settings Dialogue

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

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

2. Click "Activate License".

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

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

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

4. Click "Activate".

    a) The license will be activated now.

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

2.2 Activate License Extension via Settings Dialogue

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

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

2. Click "Activate License".

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

    a) Click the button "Deactivate".

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

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

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

5. Click "Activate".
   a) The license incl. the license extension(s) will be activated now.

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

2.3 Activate License via Website

If your ecoDMS workplace (ecoDMS Client) does not have access to the internet, you can activate your ecoDMS license manually. To do so, request a code via the ecoDMS website. You can do this from any PC with internet access. You can then activate the license without internet access through the settings dialogue. Complete the following steps [3, 4, 1, 5]:

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

2. Click "Activate License".

3. Enter your license information in the "Activate / Deactivate License" window.
   a) **Licensee:** Enter the licensee here. Make sure the spelling is correct. You received the name of the licensee via email after you purchased your license(s).
   b) **License Number:** Enter the license number here. Make sure the spelling is correct. You received the license number via email after you purchased your license(s).

4. Enable the field "Activate manually".

5. Note the displayed Hardware ID.
   a) for example: Copy it to Clipboard.

6. Enter the written address into your web-browser.
   a) www.ecodms.de -> Support -> License Activation

7. Now you must enter your license information and the hardware id.
   a) **Licensee:** Enter the licensee here. Make sure the spelling is correct. You received the name of the licensee via email after you purchased your license(s).
   b) **License Number:** Enter the license number here. Make sure the spelling is correct. You received the license number via email after you purchased your license(s).
   c) **Hardware-ID:** Enter your hardware id here. Please refer to the ecoDMS settings dialogue to get the necessary Hardware ID (Clipboard).

8. Click "Activate License".

9. If the activation is successful, you will get your personal activation code.
   a) Note the displayed code.
      i. for example: Copy it to Clipboard.

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

11. Click "Activate".
    a) The license will be activated now.

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

2.4 Deactivate License via Settings Dialogue

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

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

2. Click "Deactivate".

a) The license will be deactivated now.

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

Important Information for Chapter 2

[1] *Die Aktivierung einer Lizenz ist jeweils nur für eine Serverinstanz zulässig. Um die Lizenz z.B. auf einer anderen Server Instanz oder nach einer Neuinstallation wieder einspielen zu können, muss diese zunächst deaktiviert werden. Die Deaktivierung erfolgt über den ecoDMS-Einstellungsdialog.*

[2] *Diese Funktion setzt einen Zugriff auf das Internet voraus.*

[3] *Diese Funktion setzt zur Ansicht und Nutzung bestimmte System-Berechtigungen voraus.*

[4] *Sollte eine Deaktivierung gemäß ecoDMS-Handbuch nicht mehr möglich sein, weil dieser Vorgang beispielsweise vergessen wurde, können Sie die Wiederherstellung (Deaktivierung) über ein Online-Formular auf der ecoDMS Webseite durch die ecoDMS GmbH beantragen.*

[5] *Sollte eine virtuelle Maschine eingesetzt werden, muss es sich hierbei unbedingt um eine Hardware Virtual Machine (HVM) handeln. Es werden keine PV unterstützt (Paravirtualization). Eine Lizenz Aktivierung ist sonst nicht möglich.*

3 View

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

3.1 Visible Documents

In ecoDMS Client you can set the type of document to be displayed. You can select personal and all documents. In addition, you can set the maximum number of search results you want to display.

3.1.1 Display All Documents

If the function "Display All Documents" on the toolbar is enabled, all documents, for which the user has permission, are displayed. Click the icon to change the display. This configuration is recommended as default setting.

Figure 3.1: Display All Documents

3.1.2 Display My Documents

If the function "Display My Documents" on the toolbar is enabled, only your personal documents are displayed. For this, a permission needs to be assigned to your user name in the classification (not to you as part of a group). Click the icon to change the display.

Figure 3.2: Display My Documents

3.1.3 Number of Search Results

At the bottom of ecoDMS Client, there is a text entry box for search results in the right-hand corner. In this area you can determine the maximum number of search results displayed in the table.

  – Default: 100 results

  – Minimum: 1 result

  – Maximum: 1000 results
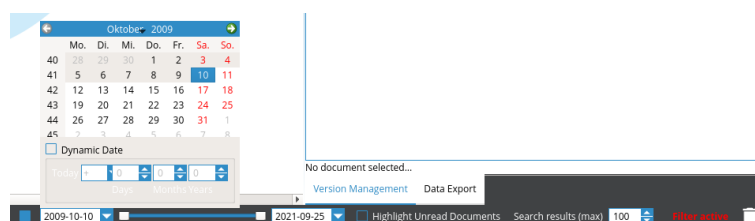
Figure 3.3: Search Results (max.) -> Right to Timeline

3.2 Highlight Unread Documents

Documents that have not yet been opened by a user ("Show" function) can be highlighted by the system. These documents are identified in the table in bold font. This function can be enabled or disabled at each workstation [1].

1. At the bottom right of ecoDMS Client, there is an entry called "Highlight Unread Documents".

2. If you enable the checkbox, unread documents are highlighted until they are opened for the first time ("Show" function).
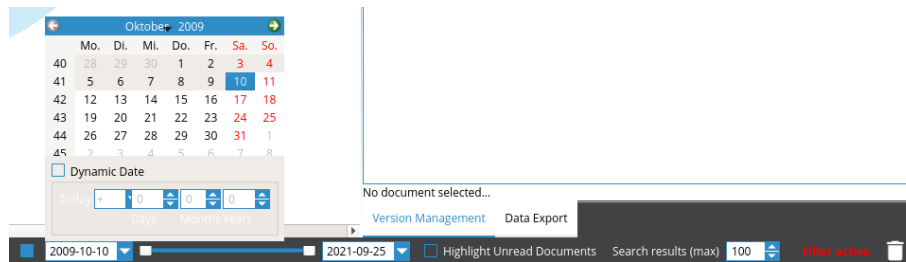
Figure 3.4: Highlight Unread Documents

3.3 Icons

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

3.3.1 ecoDMS

	Archive		Show
	Export		Send
	Send Link via E-Mail		Copy link to the Clipboard
	Create Resubmission		Display History
	Reload Documents		Reload Desktop
	Reload Desktop (Notification)		Print
	Move to Trash		Restore Document
	Display All Documents		Display My Documents
	Search Folder		Continue Search (Folder)
	Advanced Full-Text Search		Classify

	Mass Classification		Create New Versioned Document
	Add New Version to Document		Lock Document (Check-Out)
	Unlock Document (Check-In)		Create Note
	Settings		User and Group Management
	Manage Plugins		Reset All Active Filters
	Trash Opened		Trash Closed

3.3.2 Data Export

	Create New Export		Refresh Export
	Save Export		Delete Export

3.3.3 Classification

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

3.3.4 Notes

	Create Note		Remove Note
	Format Note		

3.3.5 Version Management

	Open Version		Export Version
	Add New Version to Document		Finalise Version

	Lock Document (Check-Out)		Unlock Document (Check-In)

3.3.6 Inbox

	Save Changes		Save Document As...
	Save Document as PDF...		Scan New Document
	Add Page(s) to Document		Copy Text from Document
	Reload Desktop		Zoom Out
	Zoom In		Fit (Zoom)
	Rotate Left		Rotate Right
	Rotate 180 Degrees		Delete Selected Page(s)
	Add Page(s) to Document		Export Selected Page(s)
	Previous Document		Next Document
	Request Scanned Documents		Delete Document from Server
	Split Document		Unlock Document
	Search Matching Classification Template		

3.4 Toolbar Settings

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

3.4.1 Open Toolbar Management

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

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

2. The dialogue "Configure Toolbars" opens.
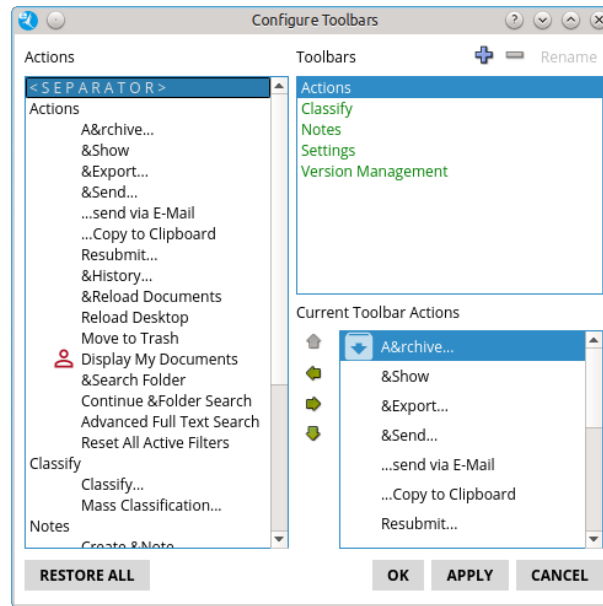
Figure 3.5: Toolbar Management

3.4.2 Create New Toolbar

To create a new toolbar:

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

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

3. Overwrite this name with your description.

4. Then press "Enter".

3.4.3 Delete Toolbar

You can delete the toolbars you have created.

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

2. Now click the - icon.

3. You have deleted the toolbar.

3.4.4 Add Toolbar Actions / Icons

You can add more actions / icons to the toolbars:

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

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

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

3.4.5 Remove Toolbar Actions / Icons

You can delete actions / icons in custom toolbars:

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

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

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

3.4.6 Change the Order of Toolbar Icons/Actions

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

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

2. In the "Assigned Toolbar Actions" area, select the icon you want to move.

    a) Click the "Up Arrow" to move the icon upward.

    b) Click the "Down Arrow" to move the icon downward.

3.4.7 Restore All

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

3.5 Configure Table View

- The maximum number of listed documents in the table depends on the settings in the "Search Results (Max)" area (at the bottom right of ecoDMS Client) and on the active filter, if any.
- Users can only see the documents for which they have a permission.

In the table ecoDMS displays the searched documents with their associated classification attributes. The table is divided into several columns with information about the archived documents. This is where the classification attributes and their values are displayed. In addition to the Classification dialogue, the table can also be used to edit the individual entries.

Figure 3.6: Table View in ecoDMS Client

Figure 3.7: Table - Show/Hide Column(s)

Figure 3.8: Table - List of Attributes

3.5.1 Hide Columns

The columns display the available classification attributes. To hide columns, you do not need, complete the following steps [1]:

1. Right-click a column header in the table.

2. Select the "Show/Hide Columns" command

3. A list containing the available columns opens
   a) If the checkbox is disabled, the column is not displayed in the table.

3.5.2 Show Columns

The columns display the available classification attributes. To show columns, complete the following steps [1]:

1. Right-click a column header in the table.

2. Select the "Show/Hide Columns" command

3. A list containing the available columns opens
   a) If the checkbox is enabled, the column is displayed in the table.

3.5.3 Adjust Columns to Content

The columns display the available classification attributes. To manually adjust the column width to the content, complete the following steps [1]:

1. Right-click a column header in the table.

2. Select the "Adjust Columns to Content" command

3. The columns are adjusted to the current contents.

3.5.4 Adjust Columns to Content (Automatic)

The columns display the available classification attributes. To automatically adjust the column width to the content, complete the following steps [1]:

1. Right-click a column header in the table.

2. Select the "Adjust Columns to Content (Automatic)" command

3. The columns are automatically adjusted to the contents.

3.5.5 Show All Columns

The columns display the available classification attributes. If columns are hidden, you can show all the columns as follows [1]:

1. Right-click a column header in the table.

2. Select the "Show All Columns" command

3.6 Manage Desktop

There are several functions to manage your workspace.

3.6.1 Save Desktop Settings

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

1. Click "View - Save Desktop Settings"

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

3. Confirm your selection with "OK".

3.6.2 Load Desktop Settings

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

1. Click "View - Load Desktop Settings".

2. Select the saved file on your file system.

3. Confirm your selection with "OK".

3.6.3 Reset Desktop

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

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

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

3.6.4 Reload Desktop

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

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

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

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

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

Figure 3.9: Icons - Reload Desktop

3.6.5 Minimise / Maximise / Restore Client

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

3.7 Windows / Area Visibility

ecoDMS has various windows and plugins, which you can show and hide. Some examples for windows and plugins are:

– Status

– Favorites

– Folders

– Preview

3.7.1 Hide Windows

1. Right-click the toolbar or menu bar

2. Remove the ticks for all entries you do not want to show

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

3.7.2 Show Windows

1. Right-click the toolbar or menu bar

2. Tick all entries you want to show

3.7.3 Arrange Windows in Tabs

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

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

2. Drag the window onto the other window.

3. Release the mouse button.

3.7.4 Tile Windows Vertically

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

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

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

3. Release the mouse button.

3.7.5 Tile Windows Horizontally

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

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

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

3. Release the mouse button.

3.7.6 Undock Windows

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

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

2. Now move the window to any position.

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

Important Information for Chapter 3

[1] *Bitte beachten Sie, dass diese Einstellungen auf den jeweiligen Arbeitsplatz bezogen sind und nicht im Benutzerprofil gespeichert werden.*

[2] *Es wird empfohlen mit einer Bildschirmauflösung von mindestens 1280 x 1024 px zu arbeiten.*

4 Login, Connection Manager

Being a client-server system, ecoDMS Server forms the base of the entire system. The postgreSQL database and containers for storing all data and information are also part of the server installation.

1. In order to work with ecoDMS on a client, you must log in via the Connection Manager. The Connection Manager is automatically installed together with ecoDMS Client.

2. To use the Web Client, you do not need to be connected through the Connection Manager.

3. The first installation of ecoDMS Server already creates a user. For more information on login credentials for this ecoDMS user, refer to the chapter "Login Credentials". [3].

4.1 Open Connection Manager

There are different options to open the Connection Manager.

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

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

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

Figure 4.1: Connection Manager Icon
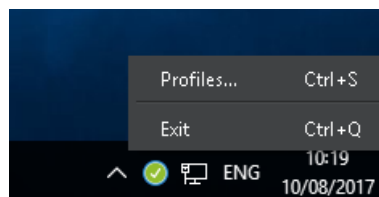
Figure 4.2: Connection Manager - Right-click
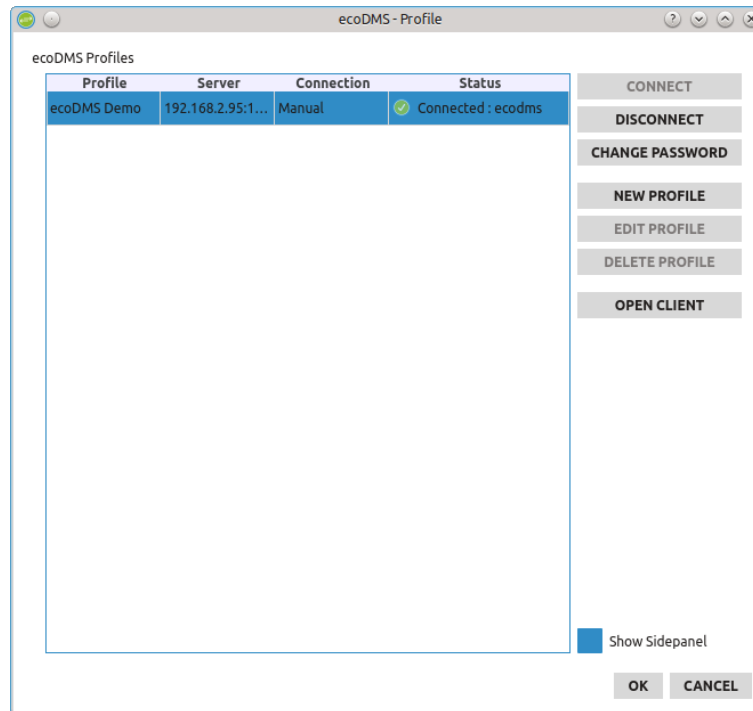
Figure 4.3: Connection Manager - ecoDMS Profile Management

4.2 Exit Connection Manager

The Connection Manager establishes the connection to ecoDMS Server. To uninstall ecoDMS and/or other ecoDMS applications, for example, you must exit the Connection Manager. To exit the Connection Manager, complete the following steps:

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

- Now click "Exit".

Attention: The connection with ecoDMS Server is only terminated if ecoDMS Client is closed and the connections have been disconnected in the Connection Manager at the respective workstation. Simply 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.
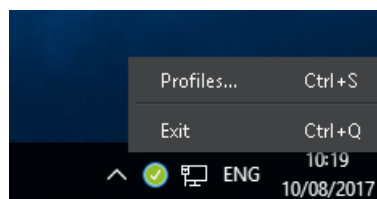
Figure 4.4: Connection Manager - Exit

4.3 Profile Icons - Description

The symbols on the Connection Manager icon in the toolbar of the operating system indicate the status of ecoDMS Server connection. The following describes the statuses.

Figure 4.5: Connection Manager - No Connection

Figure 4.6: Connection Manager - Establishing Connection

Figure 4.7: Connection Manager - Connection Established

4.4 Client-Server Communication

ecoDMS Server and its clients communicate via TLS encryption.

4.5 Access from Outside

In order to access ecoDMS from outside,

- you must activate ecoDMS Server port accordingly.

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

- Alternatively, you can allow access via VPN connection

- or use the ecoDMS Web client with enabled remote access (Settings - Web Service) (for more information, refer to the ecoDMS Web Client manual).
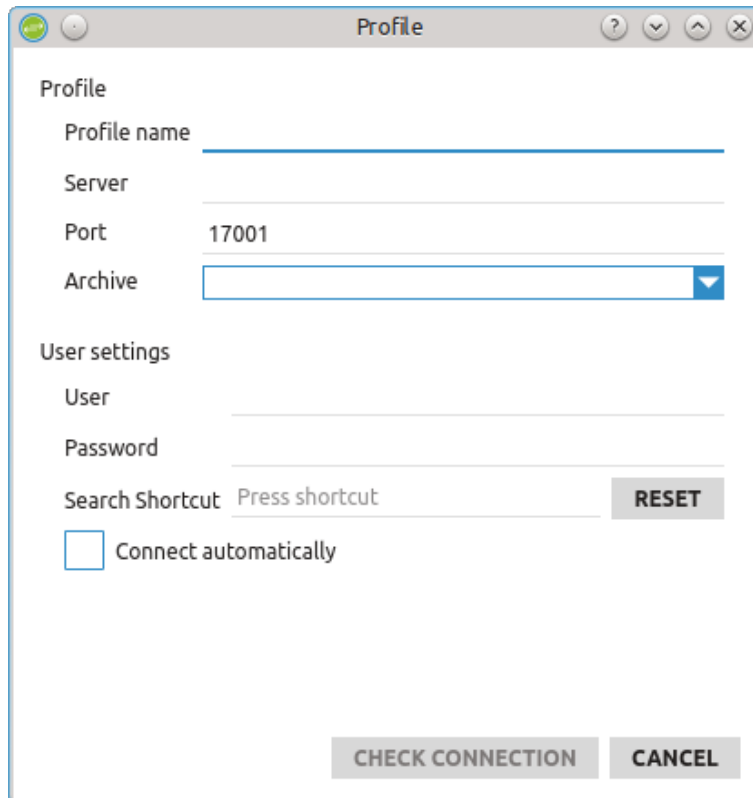
In each case the server must be made accessible from outside. Such access, however, is entirely independent from the ecoDMS system and can pose a certain security risk. This is why we recommend that any operations of this kind are carried out by a specialist.

4.6 Create Profiles and Login

- You can create any number of profiles.
- The number of concurrent connected profiles depends on your licence (number of concurrent connections).
- An error message displays if the number of available licences is exceeded.
- If connection errors occur repeatedly, access is blocked for approximately 10 minutes for security reasons.

In order to work with the ecoDMS software on your computer, you need to connect a profile with ecoDMS Server. Complete the following steps:

1. Open the ecoDMS Connection Manager.

2. Click the "New Profile" button.

3. Enter the appropriate information in the dialogue:

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

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

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

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

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

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

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

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

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

   j) **Cancel:** Click "Cancel" to cancel the operation.

Figure 4.8: Connection Manager - Create Profile

4.7 Edit Profiles

Existing profiles can be edited if necessary. But a profile can only be edited when the connection to the server for this profile is not active [2].

1. Open the ecoDMS Connection Manager.

2. Select the profile in the table.

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

4. Click the "Edit Profile" button.

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

Figure 4.9: Connection Manager - Edit Profile

4.8 Connect Profile

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

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

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

   a) Select the profile in the Connection Manager.

   b) Then click the button "Connect".

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

4.9 Disconnect Profile

- The connection to the ecoDMS server is only terminated if all clients are closed and the connections have been disconnected in the Connection Manager at the respective workstation.
- Merely disconnecting the connection manager or closing the client will not unblock a licence!
- To do this, close or disconnect all ecoDMS components and the connection manager at the workstation.

To end the connection to ecoDMS Server:

1. Open the ecoDMS Connection Manager.

2. Select the profile in the table.

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

4.10 Delete Profile

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

1. Open the ecoDMS Connection Manager.

2. Select the profile in the table.

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

4. Click the "Delete Profile" button.

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

4.11 Change Password

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

4.12 Open ecoDMS

If the Connection Manager and ecoDMS Server are connected, you can open the client. There are several options [3]:

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

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

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

Then the programme starts. The ecoDMS start screen displays.

Figure 4.10: ecoDMS Desktop Icon

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

– Depending on the hardware, hardware acceleration of the computer (not the graphics card) is required.

– Should the main window of ecoDMS Client remain white (without content) during startup, please start ecoDMS Client with ecodmsclient_opengl.bat in the installation folder of ecoDMS Client.

– Default:

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

– Execute the following file:

```
ecodmsclient_opengl.bat
```

4.13 Exit ecoDMS

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

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

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

3. Use this keyboard shortcut: Ctrl+ Q

Figure 4.11: File - Exit

Important Information for Chapter 4

[1] *Die Verbindung zum ecoDMS Server wird nur dann vollständig beendet, wenn alle Clients geschlossen und die Verbindungen über den Connection Manager am jeweiligen Arbeitsplatz getrennt sind. Das alleinige Trennen des Connection Managers oder Schließen der Clients führt nicht zur Freigabe der Lizenz! Alle ecoDMS-Komponenten und der Connection Manager müssen hierfür am Arbeitsplatz geschlossen bzw. getrennt werden.*

[2] *Es können beliebig viele Profile erzeugt werden. Die Anzahl der verbundenen Profile ist abhängig von der erworbenen Lizenzanzahl. Wird diese überschritten, kommt eine Fehlermeldung. Bei mehrmaligem Fehlverbinden wird der Zugriff aus Sicherheitsgründen für ca. 10 Minuten gesperrt.*

[3] *Zur Verwendung der ecoDMS-Komponenten muss eine Verbindung zum ecoDMS Server bestehen.*

5 Users, Groups,Passwords

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

Roles / Group System

– ecoDMS uses a Roles System. Roles are the users, groups and permissions within the system a role can also include more users and act as a group. System permissions and user groups can or should be assigned to each user. The system permissions decide which functions are available to the user. These can be different depending on the user.

– Moreover, we recommend that a role (user group) is created for each team in the company. For example, a common role can be assigned to all employees in the Accounting department. The same applies to the management, sales an all other departments and groups in a company. This structure allows a detailed and straightforward assignment of folder and document permissions. You have the following options to assign "roles" and "groups".

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

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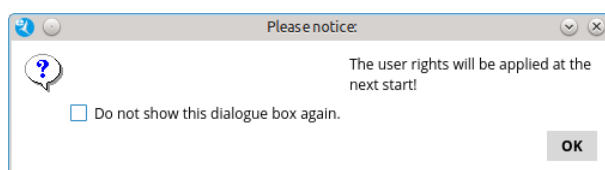
Figure 5.1: Notification User and Group Management

5.1 Permissions

In the following the system privileges are explained. You can also read here how you can assign user permissions [2].

5.1.1 System Permissions

The user is allowed to...

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

   The "ecoSIMSWEBCLIENT" role is required to use the web service incl. the web client of ecoDMS.

9. **use template management. = ecoSIMSTEMPLATES**

   The "ecoSIMSTEMPLATES" role allows you to create and edit classification templates in the ecoDMS template designer. Without this permission you can use classification templates but you cannot manage them.

10. **erase documents. = ecoSIMSDELETE**

    The "ecoSIMSDELETE" role enables irrevocable document erasure. Without this permission you can move documents into the recycle bin, but you cannot erase them after, for example, a specified retention period has expired.

11. **ecoSIMSUSER**

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

12. **scanner**

    The "scanner" role is an internal system permission of ecoDMS. The role is among others required to assign folder permissions. If a folder is provided with an authorisation, the role "scanner" should always be enabled for this folder. Otherwise when using classification templates -depending on the folder permissions- assignment of scanned documents is not permitted for the folder due to safety reasons.
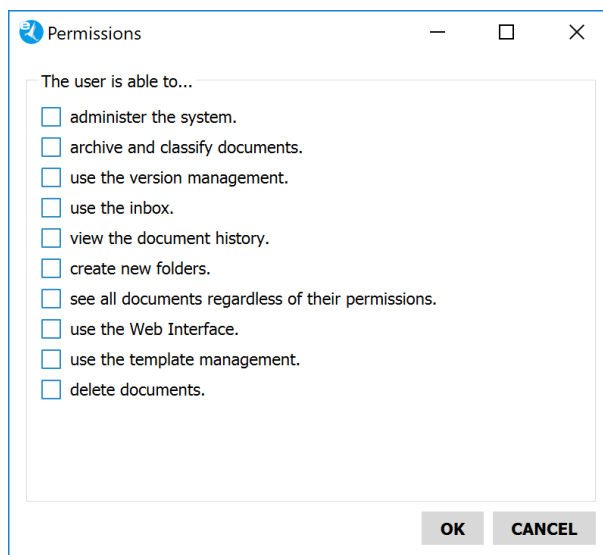
Figure 5.2: dialogue - Permissions

5.1.2 Assign Permissions via dialogue

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

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

2. Click the "Permissions" button.

3. The available permissions are displayed in a new dialogue. Select the permissions by checking them.

4. Save your settings with "OK" or cancel the operation with "Cancel".
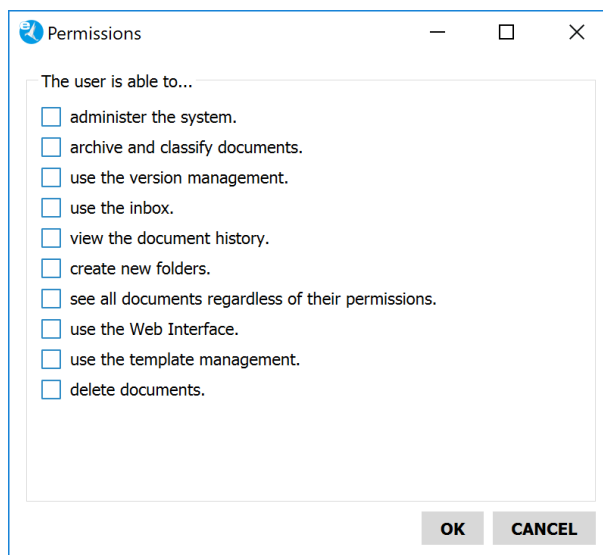
Figure 5.3: dialogue - Permissions

5.1.3 Delete Permissions via dialogue

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

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

2. Click the button "Permissions".

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

4. Save your settings with "OK" or cancel the operation with "Cancel".
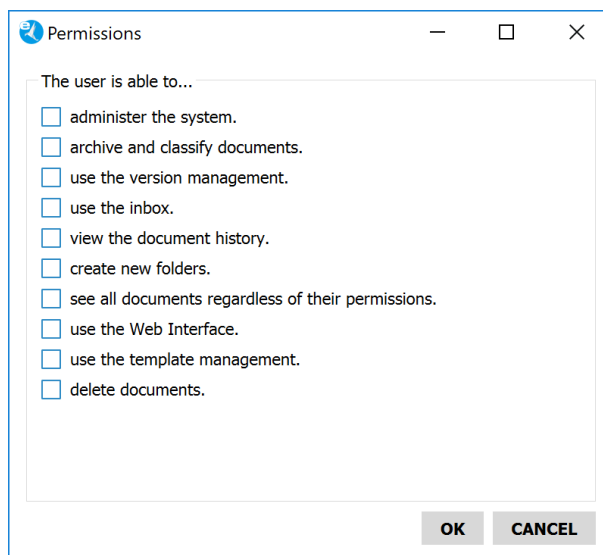
Figure 5.4: dialogue - Permissions

5.1.4 Assign Permissions via Drag & Drop

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

1. Method

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

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

2. Method

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

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

5.1.5 Delete Permissions Directly

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

1. Method

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

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

3. Click the "Remove" button.

2. Method

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

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

3. Click the "Remove" button.

5.2 User Management

ecoDMS provides several options for creating and managing users.

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

2. If you use LDAP or Active Directory services, you can connect them with ecoDMS.

This section explains how to create and manage the roles (users) **directly from ecoDMS [2, 3].**

5.2.1 Open

To open the user and group management you have to following options [3, 1]:

1. Menu -> Options -> Users **or**

2. Toolbar -> Icon "Users"

Figure 5.5: Icon - Open User and Group Management
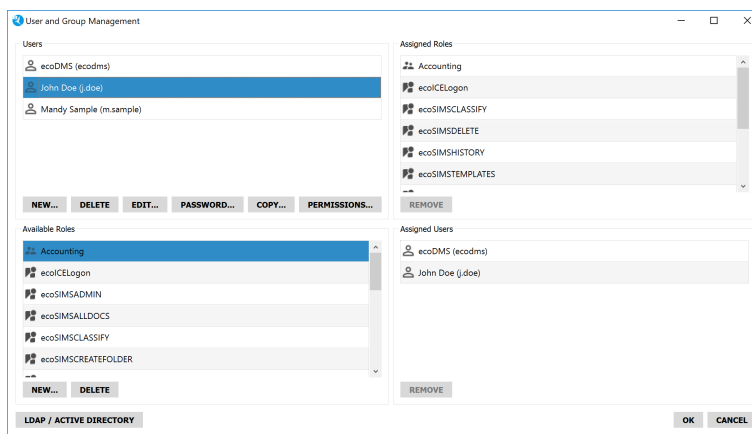
Figure 5.6: User and Group Management

5.2.2 Create User

To add new users, complete the following steps [2, 3, 1]:

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

2. A dialogue opens. Enter the user information.
   a) **Name:** Here the name of the user is entered. As a rule, first and last name are entered. Example:

```
John Doe
```

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

```
jd
```

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

```
j.doe
```

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

```
r_j.doe
```

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

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

3. Confirm your entry with "OK" or cancel the operation with "Cancel".
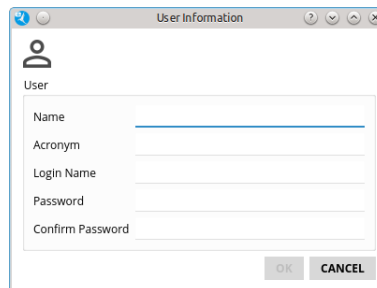
Figure 5.7: Create New User

5.2.3 Edit User

You can edit the user information if needed. Proceed as followed [2, 3, 1]:

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

2. Click the "Edit" button.

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

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

```
John Doe
```

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

```
jd
```

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

4. Confirm your entry with "OK" or cancel the operation with "Cancel".
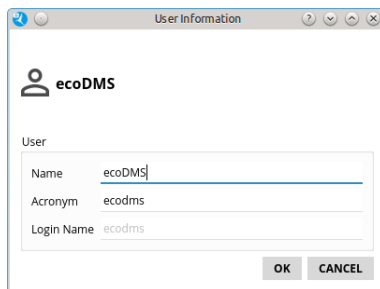
Figure 5.8: Edit User Information

5.2.4 Copy User

Permissions and Groups should be assigned to each user. For example, if several users with the same Permissions and Groups have to be created, a user can serve as a template. This template can be copied. In this case, the assigned system permissions and groups will be copied, so that only the new User Information must be entered [2, 3, 1].

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

2. Click the button "Edit".

3. A dialogue opens. Enter the user information.

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

   ```
   John Doe
   ```

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

   ```
   jd
   ```

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

   ```
   j.doe
   ```

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

   ```
   r_j.doe
   ```

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

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

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

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

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

5.2.5 Erase User

Please note:

- The information relevant for document archiving remains in the system after a user has been erased. For example, the document activities (history) will continue to provide information about who edited the document on which date.

- If the erased user last edited the document, the user name remains in the "Edited" classification field.

- The user information is an important part of the audit-proof and correct transparency of document processes. If you also want to erase this information from ecoDMS, you must completely erase the respective document. In this case the user information within the classification and the history is anonymised, provided the administrator actually erased the user.

You can irrevocably erase existing users if required. In this case permissions in classifications and folder trees are transferred to another existing user. This can also be a group or a system permission [3, 1].

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

2. Then click "Erase".

3. Select to which role you want to transfer the user permissions.

4. Confirm your selection with "OK".

5. To complete the erasure procedure, confirm with "Yes" when prompted.

6. The user is now irrevocably erased from the system. You cannot undo this operation.
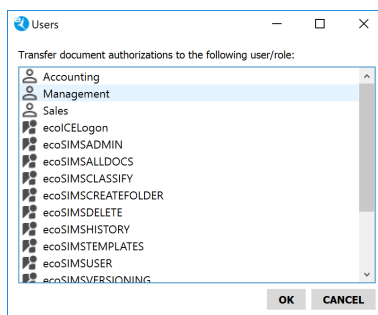
Figure 5.9: Erase User: Transfer Permissions to Another Role
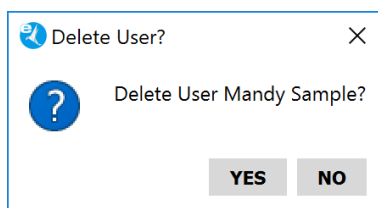
Figure 5.10: Erase User: Confirmation Prompt

5.3 LDAP / Active Directory Management

– **Licensing:** You require a license for the full version in order to use LDAP and Active Directory. You can test the functions in the free trial version before making a purchase. If you do not enter a valid license for the full version after the trial phase, you can no longer register with the LDAP/AD users you created.

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

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

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

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

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

5.3.1 LDAP/ Active Directory Open dialogue

1. Open the User and Group Management in ecoDMS Client [3, 1, 2].

2. Click "LDAP / Active Directory".

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

Figure 5.11: Icon - Open User and Group Management
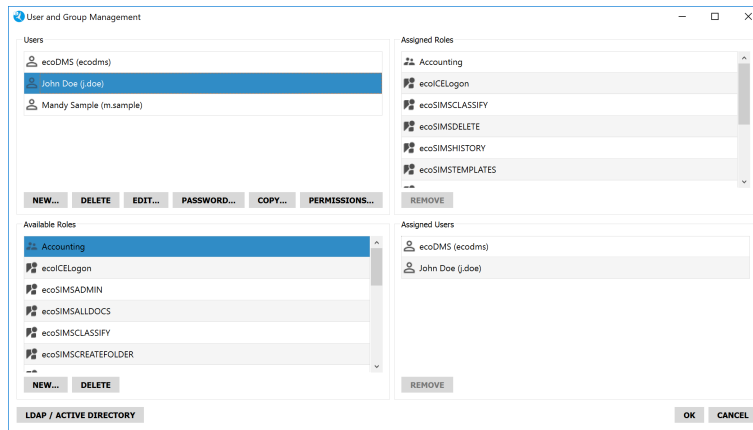
Figure 5.12: User and Group Management
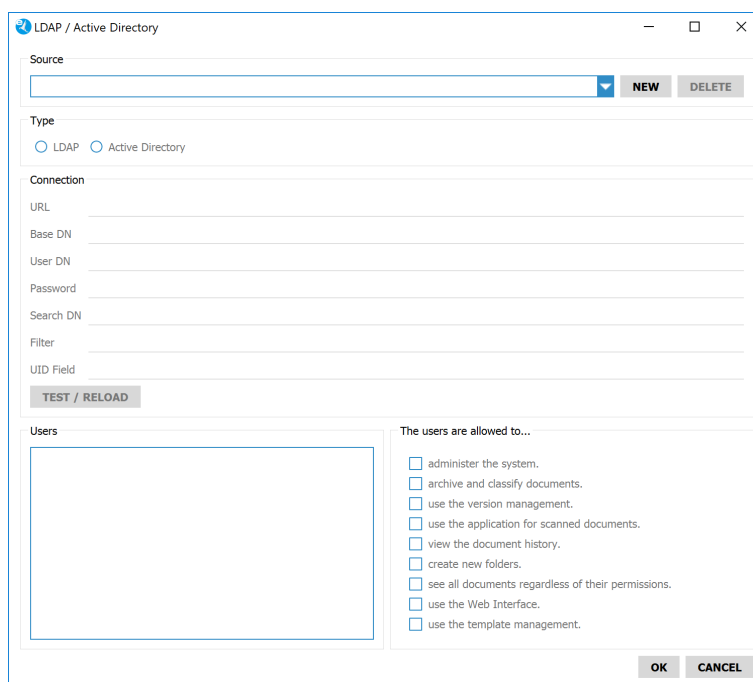
Figure 5.13: dialogue - LDAP / Active Directory Management

5.3.2 Create / Edit LDAP Profile

To create a new LDAP profile, complete the following steps [3, 1, 2]:

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

2. Click "New".

3. The "New Profile" dialogue opens.

   a) Assign a name to the profile in the "Name" entry field.
   b) Select "LDAP" as "Type".
   c) Confirm your entry with "OK" or cancel the operation with "Cancel".

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

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

   ```
   ldap://server01
   ```

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

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

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

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

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

  g) **UID Field:** Use this entry field to define the method to create the LDAP query which searches for the user data.

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

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

7. Confirm the settings with "OK" or cancel the operation with "Cancel".
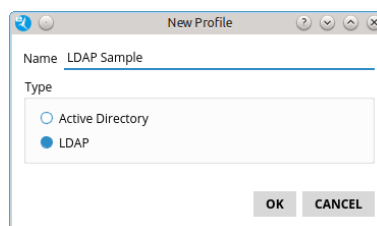
Figure 5.14: Create LDAP Profile
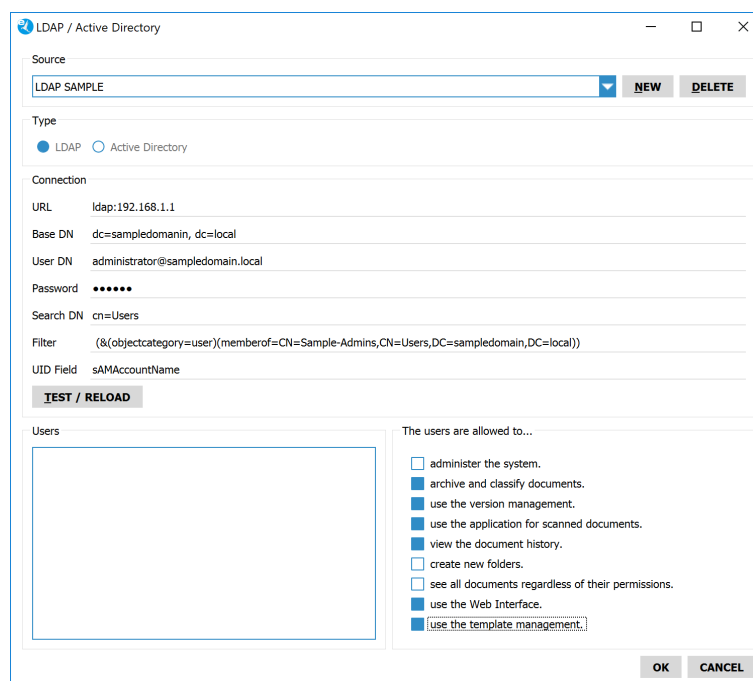
Figure 5.15: LDAP Management

5.3.3 Create /Edit Active Directory Profile

To create a new LDAP profile, complete the following steps [3, 1, 2]:

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

2. Click "New".

3. The "New Profile" dialogue opens.

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

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

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

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

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

    ```
    ldap://server01
    ```

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

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

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

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

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

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

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

        ```
        userPrincipalName
        ```

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

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

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

7. Confirm the settings with "OK" or cancel the operation with "Cancel".
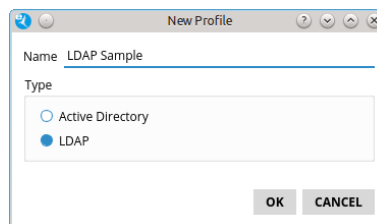
Figure 5.16: Create Active Directory Profile
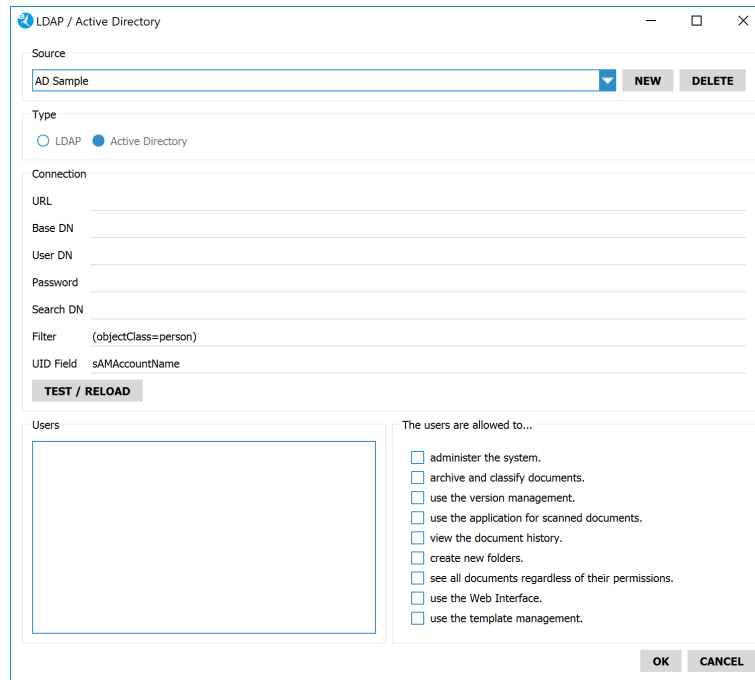
Figure 5.17: Active Directory Management

5.3.4 Example Values LDAP & Active Directory

The following values are example values for entering the LDAP / Active Directory information [3, 1, 2].

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

5.4 Custom Groups (Roles)

In ecoDMS you can create user groups (roles), for example, accounting, management, tax advisor, private... . Here you can group, for example, members of a team / department [3, 1, 2].

5.4.1 Create Custom Group

To create your custom user group [1, 2]:

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

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

3. Save the role with "OK" or cancel the operation with "Cancel".
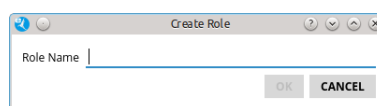
Figure 5.18: Create Custom Role

5.4.2 Assign Users to Group

There are several options to assign users to custom role(s) [1, 2, 3]:

1. Method

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

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

2. Method

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

2. Select the users separately in the "Users" area and drag them via Drag & Drop to the "Assigned Users" area.
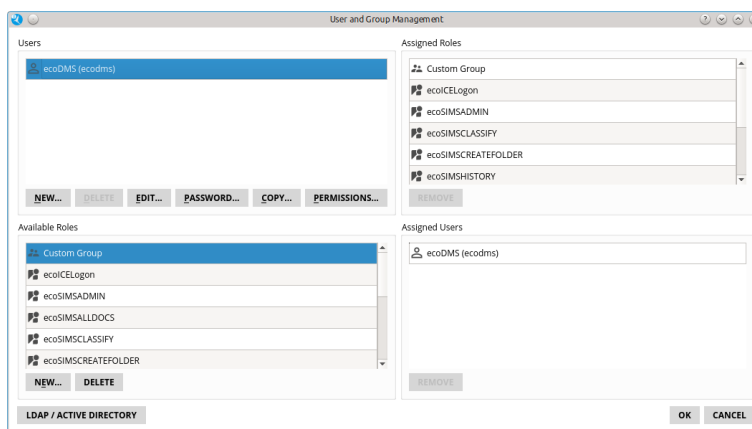
Figure 5.19: Assign Users to Group

5.4.3 Delete Users from Group

There are several options to assign users to custom role(s) [1, 2, 3]:

1. Method

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

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

3. Click the "Remove" button.

2. Method

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

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

3. Click the "Remove" button.
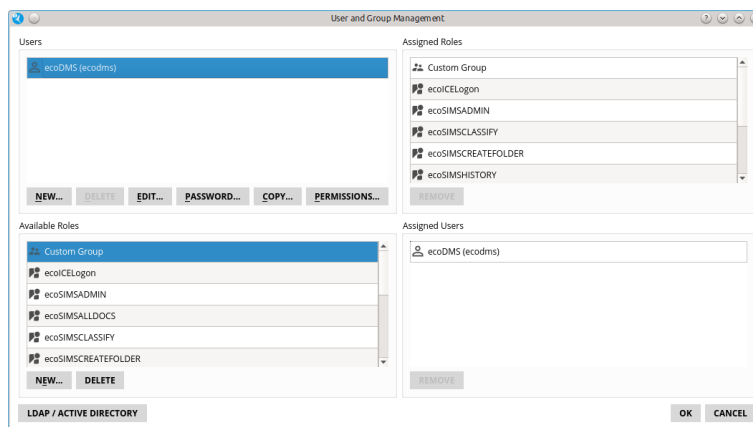
Figure 5.20: Delete Users from Group

5.4.4 Delete Custom Groups

You can delete custom groups / roles if needed. You cannot undo this operation. Please notice that "Default System Roles" (eco...) cannot be deleted [1, 2, 3].

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

2. Click the "Delete" button.

5.4.5 Example: Custom Groups

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

5.5 Change Passwords

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

5.5.1 Change Password As Administrator

ecoDMS administrators have the permission to change passwords. You do not need to know the current password to change a password. The administrator can overwrite passwords any number of times.

1. Select the user in the "User" area of the user and group management section

2. Click the "Password" button

3. A dialogue opens. Enter the following information:
   a) **New password:** Enter the new password for the user
   b) **Confirm password:** You must confirm the password for security reasons

4. Confirm your entry with "OK" or abort the process with "Cancel"

5. Once you have successfully made the changes, the message "Your password has been changed successfully." appears

6. Confirm the message with "OK"
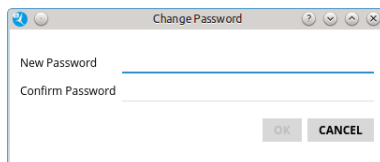
Figure 5.21: Change Password as Administrator

5.5.2 Change Your User Password

Use the Connection Manager to change your password.

1. Open the ecoDMS Connection Manager

2. Connect with your user name and valid password

3. Click the button "Change Password"

4. A dialogue opens. Enter the new password information

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

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

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

6. The new password is now valid

5.5.3 System Administrator: Change Password

Use Connection Manager to change the password of the ecoDMS system administrator. ecoDMS recommends you change this password immediately after you have installed ecoDMS.

1. Open the ecoDMS Connection Manager

2. Connect with your user name of the system administrator and the valid password

   a) Refer to the chapter "Login Credentials" for the default login credentials of the "ecoSIMSAdmin" user

3. Click the "Change Password" button

4. Enter the following password information:

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

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

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

6. The new password is now valid

5.5.4 User is locked: Reset Password

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

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

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

2. Complete the steps from the "Change Password as Administrator" section

3. The user can now access the system again. To do so, the user simply needs to log in with the user name and the new password

Important Information for Chapter 5

[1] *Alle Berechtigungen werden erst beim nächsten Programmstart des betreffenden Benutzers wirksam.*

[2] *Die Anlage und Verwendung von Benutzergruppen wird empfohlen. Das erleichtert die Klassifizierung und Zuordnung enorm.*

[3] *Diese Funktion setzt zur Ansicht und Nutzung bestimmte System-Berechtigungen voraus.*

6 Settings

- To access the settings dialogue, you require administrator permissions.
- To view the settings you made in the settings dialogue, click the button "Refresh Desktop", which is blinking red. You can also exit and restart ecoDMS Client.

Configure ecoDMS according to your internal guidelines by creating document types with specified retention periods, customised folder structures and folder permissions and customised classification attributes, adapting statuses, activating your license, storing settings for automated data backup, setting up the web service for your Web Client or activating API REST service. In addition, the settings dialogue has several other configuration options [5].

6.1 Open Settings dialogue

There are several options to open the settings dialogue:

1. Menu -> Options -> Settings

2. Toolbar -> Settings Icon

3. Shortcut: Strg + Alt + S

Figure 6.1: Icon - Settings

6.2 Document Types & Retention Periods

- Using archiving software changes the familiar folder structure. In a file system, customer folders often contain subfolders for Invoices, Offers, etc. This "complicated" structure is no longer necessary here.
- The previous sub folders are created in ecoDMS as document types. The folder structure therefore contains only main folders. The sub categories are created when classifying with the Document Type attribute.
- When assigning documents, the type of document (e.g. incoming invoices, outgoing invoices, agreement, offer is specified in Document Type.
- We recommend you select the Document Type when classifying each document you archive. This makes the handling and the retrieval of documents much easier.
- When searching for specific files, the documents can be filtered precisely.
- Please note that document types should not appear in the folder structure.

6.2.1 Samples: Document Types

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

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

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

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

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

Request	Offer	Cover Letter
Purchase Order	Notification	Certificate
Order	Management Analysis	Documentation
Photo	Payslip	Assessment
Information	Calculation	Account Statement
Dismissal	Delivery Note	Reminder
Policy	Incoming Invoice	Outgoing Invoice
Agreement	Testimonial	
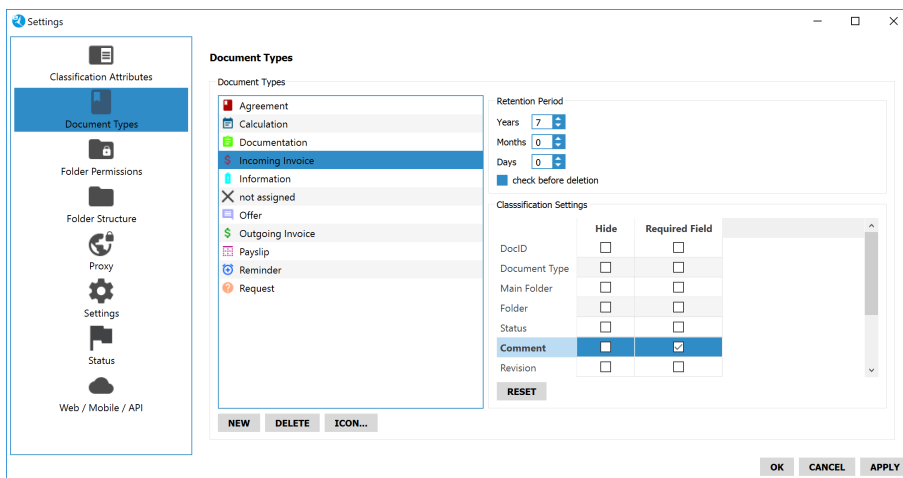
Figure 6.2: Settings - Document Types

6.2.2 Create New Document Type

To create a new Document Type, complete the following steps [5, 2]:

1. Select the tab "Document Types" in the settings dialogue.

2. Click the "New" button

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

4. Overwrite the entry with your custom name.

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

6. Click "Apply" to save the process in the settings dialogue.

7. Per default, ecoDMS creates document types without a retention period but with a confirmation prompt. This means that documents can be removed from the archive if required, but for security reasons this process is subject to prior verification.

a) If you do not want to verify the matching documents with this document type prior to deleting them, you can disable the checkbox.
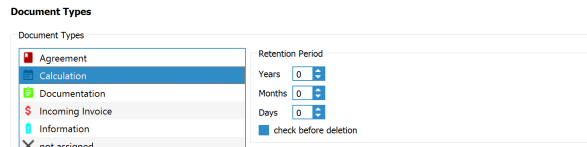
Figure 6.3: Settings - Document Types - Check Before Deletion

6.2.3 Retention Period

The retention period is the starting point for deleting documents of a particular document type. You can specify the retention period in the settings dialogue. The retention period specifies the minimum archiving period for a document in ecoDMS. One or several documents can only be irrevocably removed from the archive when the retention period has expired and the documents have been released.

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

- Although you can move documents to the Trash during the retention period, you cannot delete the documents from the system.

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

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

6.2.3.1 Create a Retention Period

To create a retention period [5, 2]:

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

2. Enter the retention time in the "Retention period" area. Here you have the following fields:
   a) Years
   b) Months
   c) Days

3. The default setting in ecoDMS for each new document type is "Check before deletion." This means that documents can be removed from the archive if required, but for security reasons this process is subject to prior verification in the Trash.
   a) If you do not want to verify the matching documents with this document type prior to deleting them, you can disable the checkbox.

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

5. Click "Apply" to save the process in the settings dialogue.
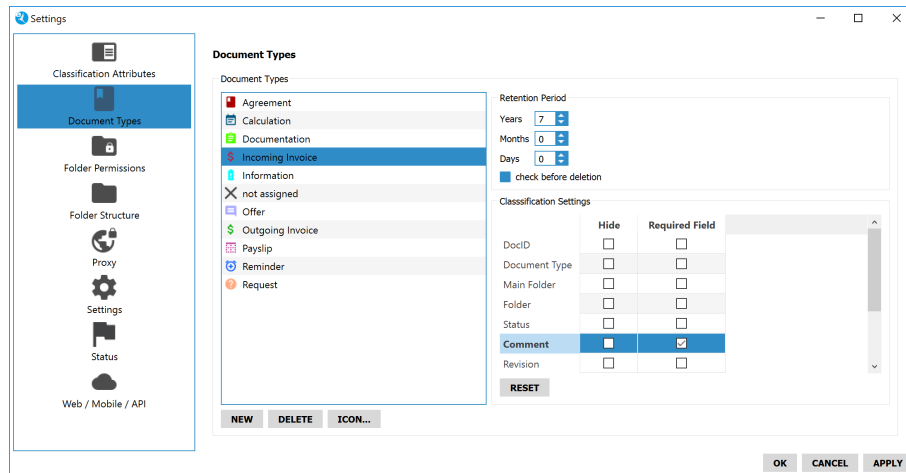
Figure 6.4: Settings - Document Types - Retention Period

6.2.4 Classification Settings

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

1. Hide non-required classification attributes.

2. Specify required fields for classification.

3. Specify the order of attributes.

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

6.2.4.1 Set Configuration

For the configuration, complete the following steps [5, 2]:

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

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

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

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

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

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

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

4. Click "Apply" to save the process in the settings dialogue.

6.2.5 Rename Document Type

You can rename specified document types. To do so, complete the following steps [5, 2]:

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

2. Overwrite the existing name.

3. Click "Apply" to save the process in the settings dialogue.

6.2.6 Delete Document Type

To delete a "document type", complete the following steps [7, 2]:

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

2. Click the "Delete" button.

3. Click "Apply" to save the process in the settings dialogue.

6.2.7 Assign Icons

You can replace the default icon with a custom icon [5, 2, 1]

1. Select the entry.

2. Click the "Icon" button.

3. Now you can either select an icon from your custom collection by clicking "..." or from the integrated icon collection that is displayed.
    a) **Custom collection:** Select the appropriate path by clicking "..." and confirm your selection with "Open".
        i. Possible file formats for this process are: *.png, *.jpg, *jpeg, *.bmp, *.ico
        ii. We recommend the use of square icons (e.g. 16x16px, 32x32px, 64x64px...).
    b) **Integrated icon collection:** Select the required icon from the displayed list of available images.
        i. You can choose any icon colour by clicking the colour box on the right above the displayed icons.
        ii. Confirm your selection with "OK" or abort the process with "Cancel".

4. Save the process by clicking "Apply" in the settings dialogue.

Figure 6.5: Icon Collection in the settings dialogue

6.3 Settings

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

6.3.1 General

In this area you can define several, general settings [5, 2]:
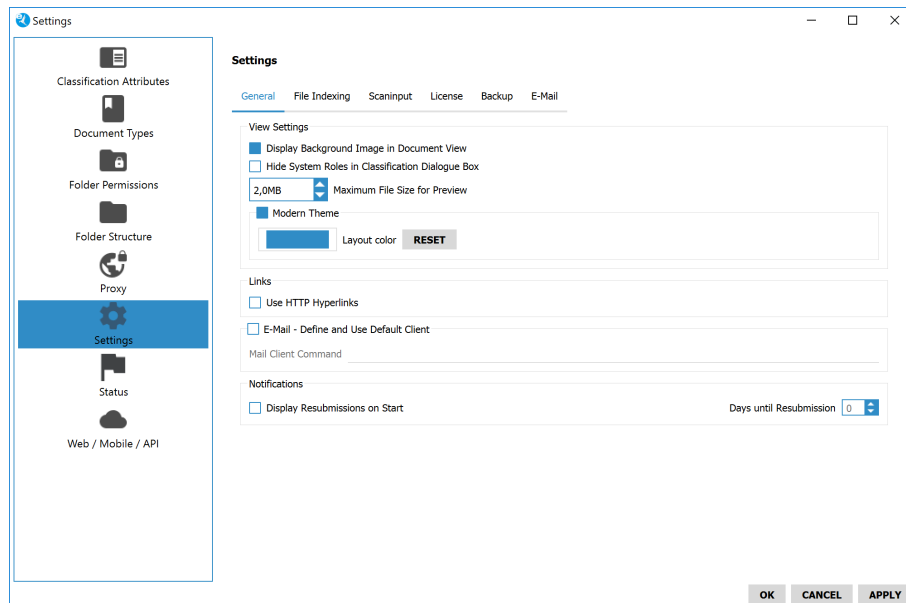
Figure 6.6: Settings - Settings - General

6.3.1.1 Display Background Image in Document View

As default the software logo is displayed in the background of the ecoDMS table. You can hide the logo as required. To hide the image, complete the following steps [5, 2]:

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

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

3. Click "Apply" to save the process in the settings dialogue.

6.3.1.2 Hide System Roles in Classification dialogue

As default all users, groups and system roles are displayed in the "permissions" area in the Classification dialogue. Normally the system roles are not used for classifying documents. Therefore, you can hide the system roles in the Classification dialogue. To hide the system roles, complete the following steps [5, 2]:

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

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

3. Click "Apply" to save the process in the settings dialogue.

6.3.1.3 Maximum File Size for Preview

For PDF files ecoDMS displays a document preview. Depending on the file size, loading the images may take a while. Here you can enter the maximum file size for the automatic preview. Files exceeding this size must be opened manually in the Preview window [5, 2]:

1. Select the "Settings - General" tab.

2. Enter the maximum file size for the preview.

3. Save the process by clicking "Apply" in the settings dialogue.

6.3.1.4 Client Design

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

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

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

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

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

3. Save the process by clicking "Apply" in the settings dialogue.

6.3.1.4.2 Use Old Design   The default layout of ecoDMS Client is a flat, modern "material design". To apply the "old design", complete the following steps:

1. Disable the setting "Modern Theme".

2. Save the process by clicking "Apply" in the settings dialogue.

6.3.1.5 Use HTTP Hyperlinks

ecoDMS has a link function. You can use it to send folder and document links to other ecoDMS users and/or copy them to the clipboard. To display the links as HTTP hyperlink, complete the following steps [5, 2]:

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

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

3. Click "Apply" to save the process in the settings dialogue.

6.3.1.6 E-Mail - Define and Use Default Client

To send documents, ecoDMS uses the email programme that was set as a default. Some email clients do not support this function. Therefore, there is an option for storing a syntax to call any email client from which you want to send documents out of ecoDMS. This email client then opens for all users as standard software for sending emails from ecoDMS. Complete the following steps [5, 2]:

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

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

3. Enter "Mail Client Command"

   a) `Example Thunderbird:`

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

   b) `Example Office 365`

   ```
   "C:\Program Files (x86)\Microsoft Office\root\Office16\OUTLOOK.EXE" /c ipm.note /a %1 /
       m ?subject=ecodms"
   ```

4. Click "Apply" to save the process in the settings dialogue.

6.3.1.7 Display Resubmissions on Start

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

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

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

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

4. Click "Apply" to save the process in the settings dialogue.

6.3.2 File Indexing

> To refresh the display, click "Reload Display".

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

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

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

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

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

5. **Failed Documents:** The number of documents which cannot be indexed because they are, for example, unreadable or defective.
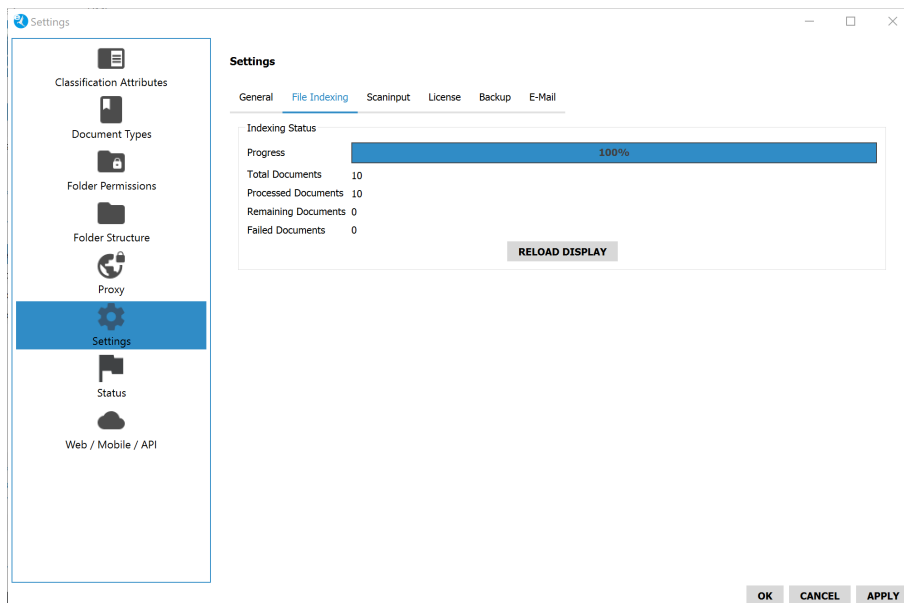
Figure 6.7: Settings - Settings - File Indexing

6.3.3 Scaninput

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

6.3.4 License

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

6.3.5 Backup

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

6.3.6 E-Mail

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

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

```
demoserver
```

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

```
25
```

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

```
STARTTLS
SSL/TLS
None
```

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

```
sampleuser
```

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

```
12345
```

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

```
sampleuser@demoserver.de
```

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

8. Save the process by clicking "Apply" in the settings dialogue.

6.4 Classification Attributes

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

> Various types of attributes are available to create custom classification attributes. Please note the following:
> – Once you have created an attribute, it cannot be deleted, but it can be renamed, edited and / or disabled.
> – You cannot use the same attribute name multiple times.
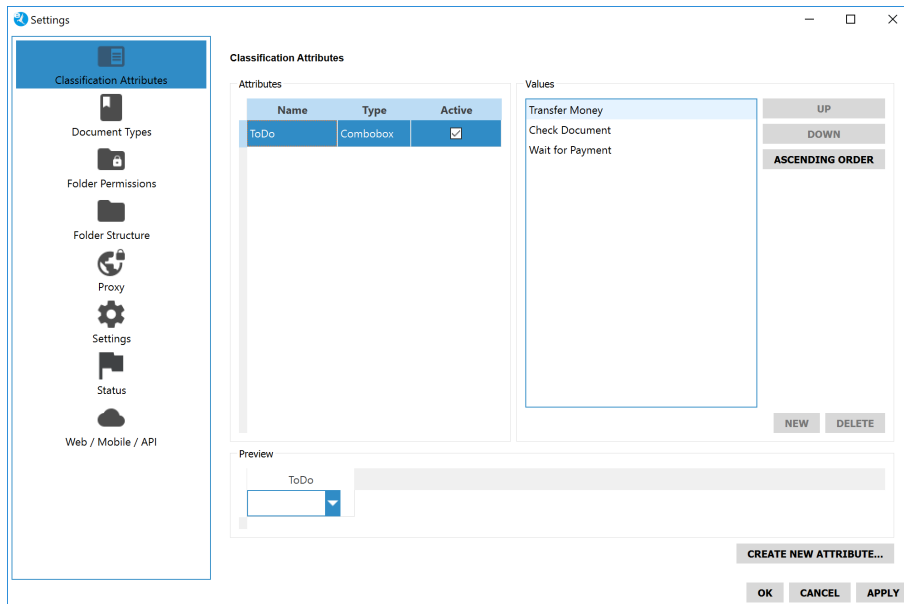
Figure 6.8: Settings - Classification Attributes
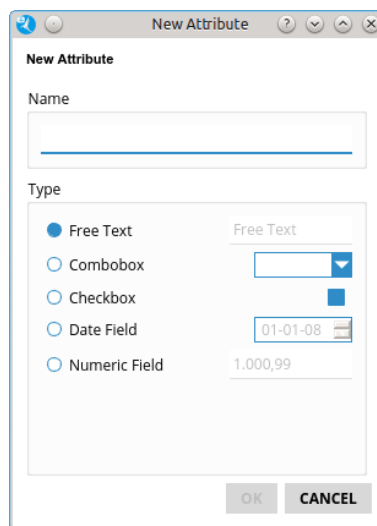
Figure 6.9: Settings - Classification Attributes - Create New Attribute

6.4.1 Free Text

The "Free Text" box allows you to enter numbers, letters and special characters. An example for this attribute is the already existing "Comment" box [5, 2].

1. Select the tab Classification Attributes in the settings dialogue.

2. Click the button "Create New Attribute".

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

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

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

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

6. Click "Apply" to save the process in the settings dialogue.

6.4.2 Combobox

The "Combobox" enables you to assign fixed values, which are displayed as a selection list during classification. The Status attribute is an example for a "Combobox" [5, 2].
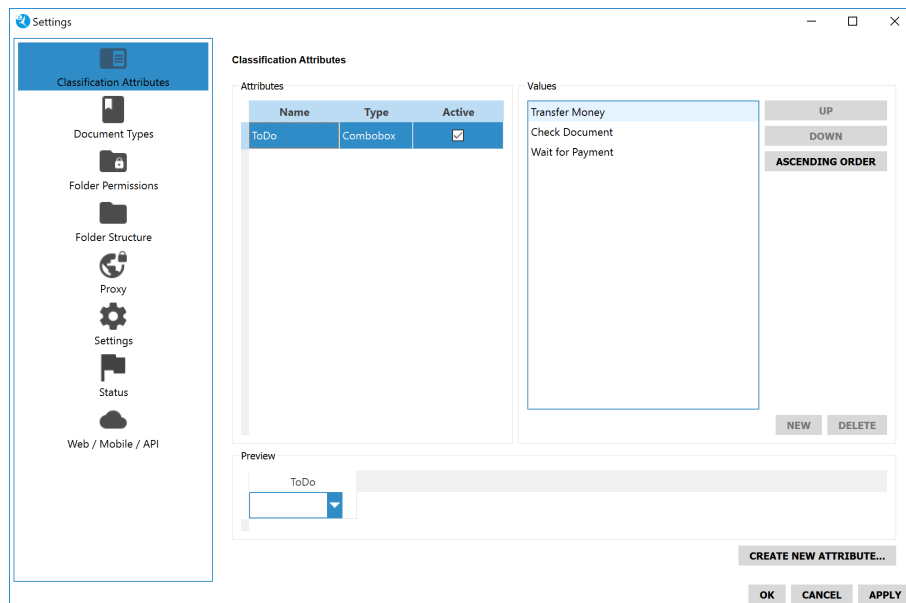
Figure 6.10: Settings - Classification Attribute - Combobox Values

1. Select the tab Classification Attributes in the settings dialogue.

2. Click the button "Create New Attribute".

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

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

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

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

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

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

8. A new dialogue. Enter the value name here.

    a) You can create any number of values.

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

10. Click "Apply" to save the process in the settings dialogue.

6.4.2.1 Combobox: Sort Values

The order of the values in a combobox created by the user can be changed as required [5, 2].

1. Select the tab Classification Attributes in the settings dialogue.

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

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

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

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

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

        i. "Up" in order upwards

        ii. "Down" in order downwards

4. Click "Apply" to save the process in the settings dialogue.

6.4.2.2 Combobox: Delete Values

The values in a "Combobox" created by the user can be deleted if necessary. **To delete the values, make sure that no documents are assigned to these values** [5, 2].

1. Select the tab Classification Attributes in the settings dialogue.

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

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

4. Click "Delete".

5. Click "Apply" to save the process in the settings dialogue.

6.4.3 Checkbox

The "checkbox" can be ticked during classification [5, 2].

1. Select the tab Classification Attributes in the settings dialogue.

2. Click the button "Create New Attribute".

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

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

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

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

6. Click "Apply" to save the process in the settings dialogue.

6.4.4 Date Field

With the "date field" you can create custom date fields for classification [5, 2].

1. Select the tab Classification Attributes in the settings dialogue.

2. Click the button "Create New Attribute".

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

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

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

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

6. Click "Apply" to save the process in the settings dialogue.

6.4.5 Numeric Field

The attribute "Numeric field" is a field where you can enter only numeric values (numbers). Valid characters for the input depend on the selected country settings on the operating system [5, 2].

1. <u>**Default settings for German:**</u> Numbers and a maximum of 1 decimal point per entry are allowed as values.
   a) If a number is entered, for example, with a dot as 1000 separator, the dot will be removed from the system when saving.
   b) Input: 1.000.000,00 = Output: 1000000,00
2. <u>**Default settings for English:**</u> Numbers and a maximum of 1 dot per entry are allowed as values.
   a) If a number is entered, for example, with a decimal point as 1000 separator, the decimal point will be removed from the system when saving.
   b) Input: 1.000.000,00 = Output: 1000000.00

To create a "Numeric Field":

1. Select the tab Classification Attributes in the settings dialogue.

2. Click the button "Create New Attribute".

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

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

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

6. Click "Apply" to save the process in the settings dialogue.

6.4.6 Enable / Disable Attributes

Attributes that are no longer needed cannot be deleted. However, they can be deactivated so that they are not displayed when classifying. Default attributes, on the other hand, cannot be deactivated. This function is only available for user-defined classification attributes. Complete the following steps [5, 2]:

1. Select the tab Classification Attributes in the settings dialogue.

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

3. Click "Apply" to save the process in the settings dialogue.

6.4.7 Rename Attributes

Custom Classification attributes can be renamed. To do this, complete the following steps[5, 2]:

1. Select the tab Classification Attributes in the settings dialogue.

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

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

4. Click "Apply" to save the process in the settings dialogue.

6.5 Folder Permissions

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

When assigning folder permissions, please note the following:

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

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

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

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

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

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

7. If a folder has a permission, then the "Scanner" role should also be enabled for this folder. Otherwise the classification templates - depending on the folder permission - for scanned documents in the Inbox may not access the required folder for security reasons.
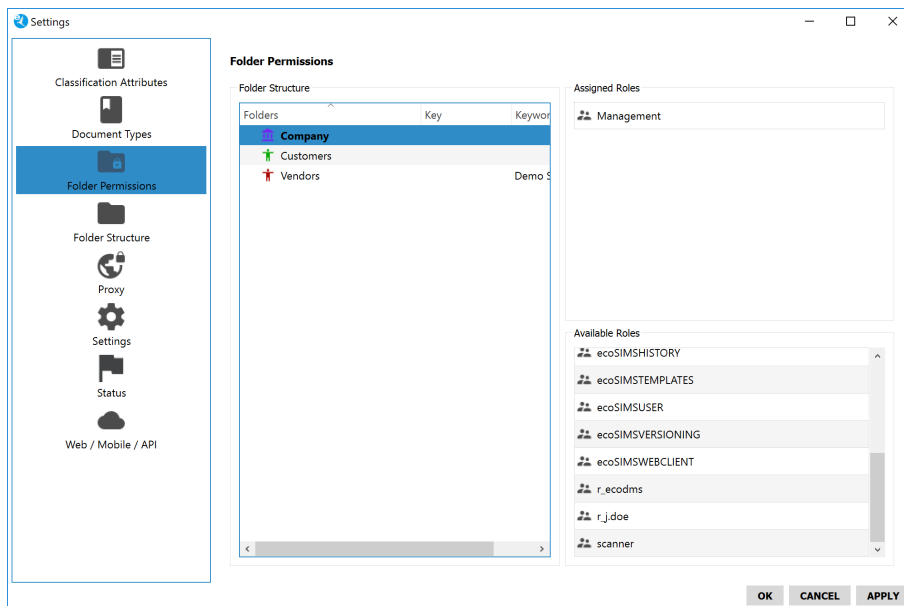
Figure 6.11: Settings - Folder Permissions

6.5.1 Assign Folder Permissions

If you want to assign specific users and / or groups on folders, complete the following steps [5, 2, 4]:

1. Select the "Folder Permissions" tab in the settings dialogue.

2. Select the required folder in the Folder Structure.

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

4. You can repeat this operation for other folders.

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

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

5. Click "Apply" in the settings dialogue to save the operation.

6.5.2 Remove Folder Permissions

If you have assigned on a folder specific users and / or groups, you can remove them as follows[5, 2, 4]:

1. Select the "Folder Permissions" tab in the settings dialogue.

2. Select the required folder in the Folder Structure.

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

4. You can repeat this operation for other folders.

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

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

5. Click "Apply" in the settings dialogue to save the operation.

6.5.3 User Example

Case 1:

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

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

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

    a) Folder: Test Company

    b) Document type: Incoming invoices

    c) Status: ToDo

    d) Permissions: For classify by all users

Explanation for case 1:

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

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

Case 2:

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

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

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

    a) Folder: Test Company

    b) Document type: Incoming invoices

    c) Status: ToDo

    d) Permissions: For classify for "Peter Smith"

Explanation for case 1:

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

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

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

6.6 Folder Structure

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

– We recommend you create a flat and simple structure.

– Create as few folders as possible.

– Use the advantages of the integrated document classification.

– Take care not to confuse subfolders with document types.

Here you create the Folder Structure. ecoDMS differentiates between main folders and subfolders.
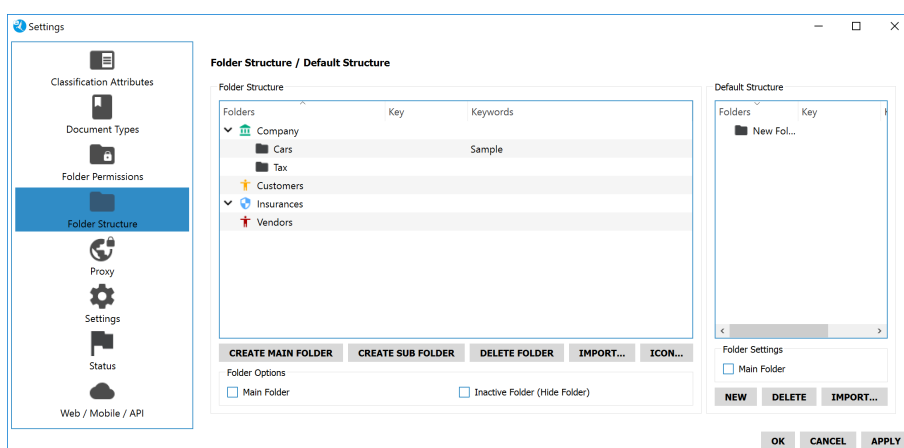
Figure 6.12: Settings - Folder Structure

6.6.1 Create Main Folder

You can assign further folders to a main folder. Moreover, all main folders are assigned and displayed automatically during Classification. You can also create folders directly through the Classification dialogue or the folder structure if you have the according permission. Each folder that is marked as a main folder is displayed in the Main Folder column during classification. The folders you created cannot be moved within the folder structure [5, 2].

1. Select the tab Folder Structure in the settings dialogue.

2. Click the button "Create Main Folder".

3. A dialogue opens. Enter the following information:

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

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

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

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

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

      iii. All deposited keywords must be complete and written consistently throughout the document! Use unambiguous terms, e.g. the VAT-ID of a company or customer number. Enter keywords without a hyphen or a

comma. The recorded words are " and" -linked. For the detection, all detected items must be included in the document in the same notation.

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

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

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

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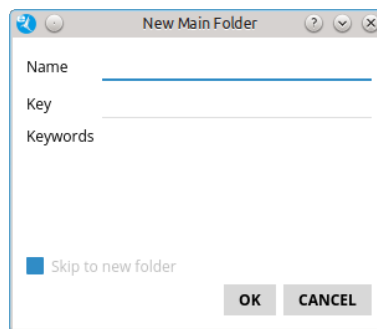
Figure 6.13: Settings - Folder Structure - Create Main Folder

6.6.2 Convert Folder to Main Folder

You can turn an existing folder, which was not created as a main folder, into a main folder. If this folder already contains documents, the classification will not be changed because of revision secure. To apply the change to existing classifications, they must be reclassified manually [5, 2].

1. Select the tab Folder Structure in the settings dialogue.

2. Select the folder in the Folder Structure.

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

4. Click "Apply" to save the process in the settings dialogue.

6.6.3 Create Subfolder

You can select subfolders in the folder structure as filing destination during classification. The system automatically recognises the associated main folder. You can also create folders directly through the Classification dialogue or the folder structure if you have the according permission. The folders you created cannot be moved within the folder structure. [5, 2].

1. Select the tab Folder Structure in the settings dialogue.

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

3. Click the button "Create Sub Folder".

4. A dialogue opens. Enter the following information:

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

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

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

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

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

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

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

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

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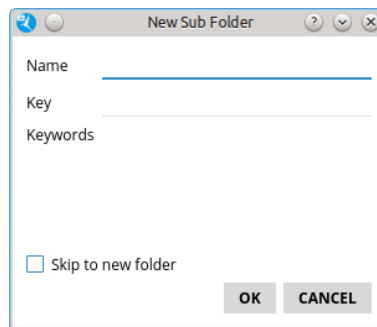
Figure 6.14: Settings - Folder Structure - Create Sub Folder

6.6.4 Rename Folder

Folders can be renamed if necessary. A change of the name is not recommended. The change takes effect for existing classifications. Complete the following steps [5, 2]:

1. Select the tab Folder Structure in the settings dialogue.

2. Select the folder you want to rename in the Folder Structure by double-clicking in the "Folder" column.

3. Enter the new name.

4. Click "Apply" to save the process in the settings dialogue.

6.6.5 Change Key

Keys can be changed if necessary. Complete the following steps [5, 2]:

1. Select the tab Folder Structure in the settings dialogue.

2. Select the key you want to change in the Folder Structure by double-clicking in the "Key" column.

3. Enter the new key.

4. Click "Apply" to save the process in the settings dialogue.

6.6.6 Change Keywords

Keywords can be changed if necessary. Complete the following steps [5, 2]:

1. Select the tab Folder Structure in the settings dialogue.

2. Select the keywords you want to change in the Folder Structure by double-clicking in the "Keywords" column.

3. Enter the new keywords.

4. Click "Apply" to save the process in the settings dialogue.

6.6.7 Delete Folder

You can delete folders if they do not contain any documents and/or subfolders [7, 5, 2].

1. Select the tab Folder Structure in the settings dialogue.

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

3. Click "Delete Folder".

4. Click "Apply" to save the process in the settings dialogue.

6.6.8 Import a Folder Structure

You can import an existing folder structure as an XML file [5, 2].

1. Select the tab Folder Structure in the settings dialogue.

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

3. Select the XML file and open it.

4. Click "Apply" to save the process in the settings dialogue.

6.6.8.1 Valid XML Items

1. name (folder name)

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

3. buzzwords (keywords)

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

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

6.6.8.2 XML Sample

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

6.6.9 Assign Icons

You can replace the default icon with a custom icon [5, 2, 1]

1. Select the entry.

2. Click the "Icon" button.

3. Now you can either select an icon from your custom collection by clicking "..." or from the integrated icon collection that is displayed.

a) **Custom collection:** Select the appropriate path by clicking "..." and confirm your selection with "Open".

    i. Possible file formats for this process are: *.png, *.jpg, *jpeg, *.bmp, *.ico

    ii. We recommend the use of square icons (e.g. 16x16px, 32x32px, 64x64px...).

b) **Integrated icon collection:** Select the required icon from the displayed list of available images.

    i. You can choose any icon colour by clicking the colour box on the right above the displayed icons.

    ii. Confirm your selection with "OK" or abort the process with "Cancel".

4. Save the process by clicking "Apply" in the settings dialogue.

Figure 6.15: Icon Collection in the settings dialogue

6.6.10 Inactive Folder (Hide Folder)

Folders that are not being used or are not needed can be hidden for all users. The inactive folders are not visible for users [5, 2].

1. Select the tab Folder Structure in the settings dialogue.

2. Select the folder in the Folder Structure.

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

4. Click "Apply" to save the process in the settings dialogue.

6.6.11 Default Structure

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

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

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

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

6.6.11.1 Create a New Folder in the Default Structure

To create a new folder in the Default Structure, complete the following steps [5, 2]:

1. Select the tab Folder Structure in the settings dialogue.

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

3. Click "New" in the "Default Structure".

   a) A folder is automatically created.

   b) Create a default structure with any number of folders

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

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

4. Click "Apply" to save the settings

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

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

6. Click "Apply" to save the process in the settings dialogue.

6.6.11.2 Import a Default Structure

You can import an existing default folder structure as an XML file [5, 2]:

1. Select the tab Folder Structure in the settings dialogue.

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

3. Select the XML file and open it.

4. Click "Apply" to save the process in the settings dialogue.

6.6.11.2.1 Valid XML Items

1. name (folder name)

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

3. buzzwords (keywords)

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

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

6.6.11.2.2 XML Sample

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

6.6.11.3 Delete Folder from Default Structure

You can delete folders if they do not contain any documents and/or subfolders [7, 5, 2].

1. Select the tab Folder Structure in the settings dialogue.

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

3. Click "Delete".

4. Click "Apply" to save the process in the settings dialogue.

6.7 Proxy

To

> If you have enabled a Proxy in your network, you can also use this for ecoDMS as an option. A Proxy is a communication interface in a network. It is the interface for data transfer between two communication partners. As a rule, a Proxy is used when the actual server is to be placed in a secured network and access from outside is restricted to the Proxy.
>
> **Please note that the following settings can be saved in ecoDMS, but cannot yet be used by the system. The proxy function is not yet available in this version.**

enable the Proxy for ecoDMS, complete the following steps [5, 2]:

1. Select the Proxy tab in the settings dialogue.

2. Enable the "Use Proxy" checkbox.

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

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

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

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

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

    b) **Password:** Enter the matching password here.
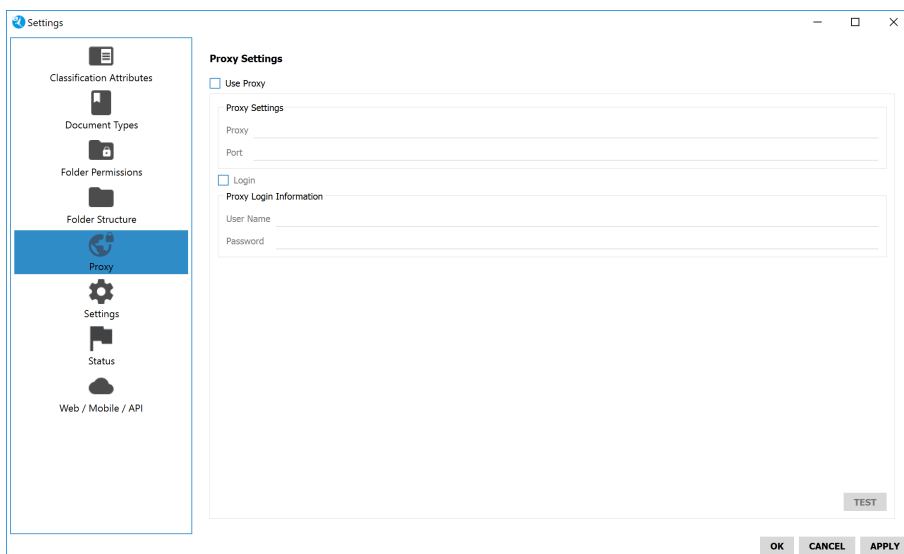
Figure 6.16: Settings - Proxy (Function is currently disabled)

6.8 Statuses

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

1. Done

2. Resubmission

   a) The "Resubmission" status has substatuses in the front end. These are fixed integrated filters. This is why they are not displayed in the settings dialogue.

      i. Expired

      ii. Next 7 days

3. To Do

Tip: Do NOT assign new "statuses" such as "Check", "Pay", "Book", "Sign", etc. Create such "To Dos" as "tasks" in a separate "classification attribute". Then you can, for example, assign the "To Do" status and, in addition, allocate the associated tasks. This makes filtering documents much easier and helps you to make optimal use of the system. A task should therefore not be a Status.
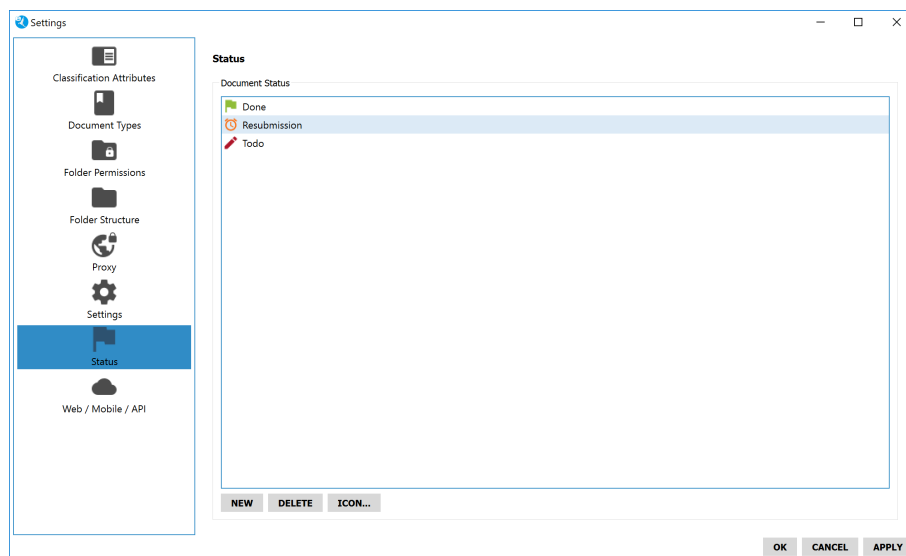
Figure 6.17: Settings - Statuses

6.8.1 Create New Status

To create a new Status, complete the following steps [5, 2]:

1. Select the tab Status in the settings dialogue.

2. Click the "New" button

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

4. Overwrite the entry with your custom name.

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

6. Click "Apply" to save the process in the settings dialogue.

6.8.2 Rename Status

If necessary, you can rename a status. A name change of the default status is not recommended[5, 2].

1. Select the tab Status in the settings dialogue.

2. Select the Status.

3. Overwrite the entry with your custom name.

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

5. Click "Apply" to save the process in the settings dialogue.

6.8.3 Delete Status

You can delete statuses if they do not contain any documents [5, 2].

1. Select the tab Status in the settings dialogue.

2. Click the "Delete" button

3. Repeat this process to delete more statuses.

4. Click "Apply" to save the process in the settings dialogue.

6.8.4 Assign Icons

You can replace the default icon with a custom icon [5, 2, 1]

1. Select the entry.

2. Click the "Icon" button.

3. Now you can either select an icon from your custom collection by clicking "..." or from the integrated icon collection that is displayed.

   a) **Custom collection:** Select the appropriate path by clicking "..." and confirm your selection with "Open".

      i. Possible file formats for this process are: *.png, *.jpg, *jpeg, *.bmp, *.ico

      ii. We recommend the use of square icons (e.g. 16x16px, 32x32px, 64x64px...).

   b) **Integrated icon collection:** Select the required icon from the displayed list of available images.

      i. You can choose any icon colour by clicking the colour box on the right above the displayed icons.

      ii. Confirm your selection with "OK" or abort the process with "Cancel".

4. Save the process by clicking "Apply" in the settings dialogue.

Figure 6.18: Icon Collection in the settings dialogue

6.9 Web - Mobil - API

You can access the archive via Desktop Client, Web Client and API REST service.

6.9.1 Web Access / Remote Access

Use ecoDMS Web Client to access the archiving system via a current internet browser from your PC, laptop, smart phone and tablet. In order to use the Web Client, the associated web service must be running. Web access is enabled by default and allows you to use the Web Client within your own network. If you want to enable access via Web Client from outside (e.g. from a mobile network or another network), you must also enable remote access in the ecoDMS settings.

> – **To enable and use the web service including remote access, please read the ecoDMS Web Client manual.**
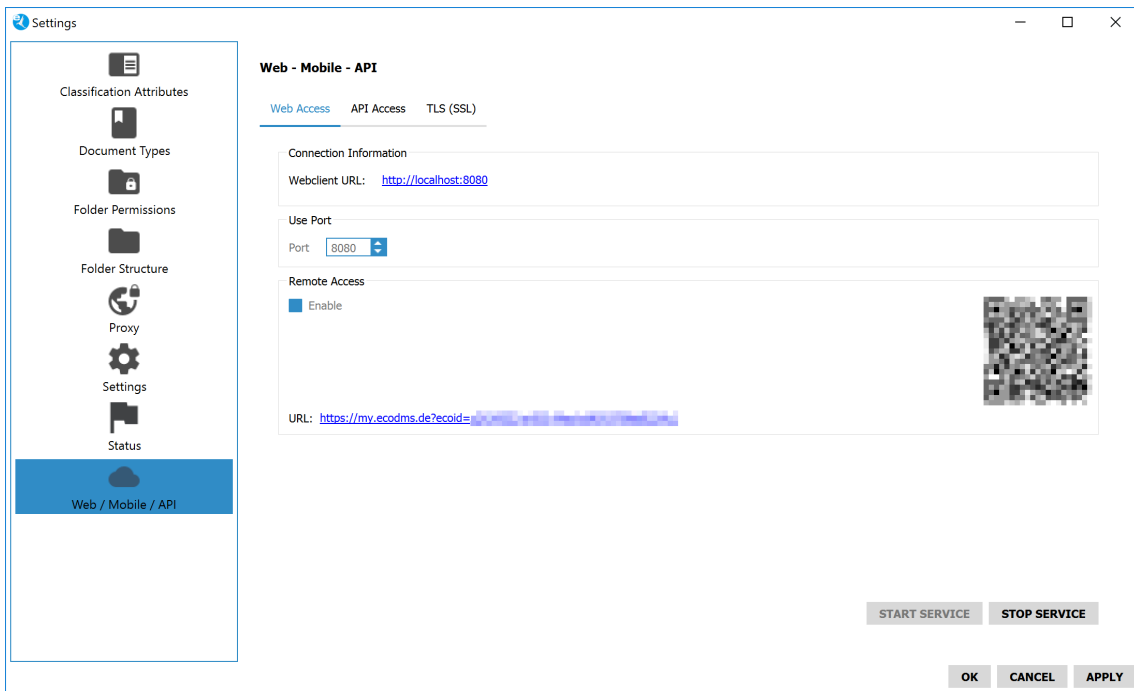
Figure 6.19: Settings: Web Services incl. Remote Access

6.9.2 API Access

An interface is available if users want to create their own scripts for customisation. The ecoDMS API REST service allows users to connect any third-party system. Users can thus connect CRM or ERP systems or other external programmes by programming the interface. The core functions of ecoDMS Server, such as "archive", "classify", or "download", can be accessed via the API. The individual functions are accessed via the REST web services. This provides each function with a unique address which is expressed as a URL and which can be used, among others, in internet browsers [5, 6]

> – **To enable and use the API access, please read the ecoDMS API REST Service manual.**
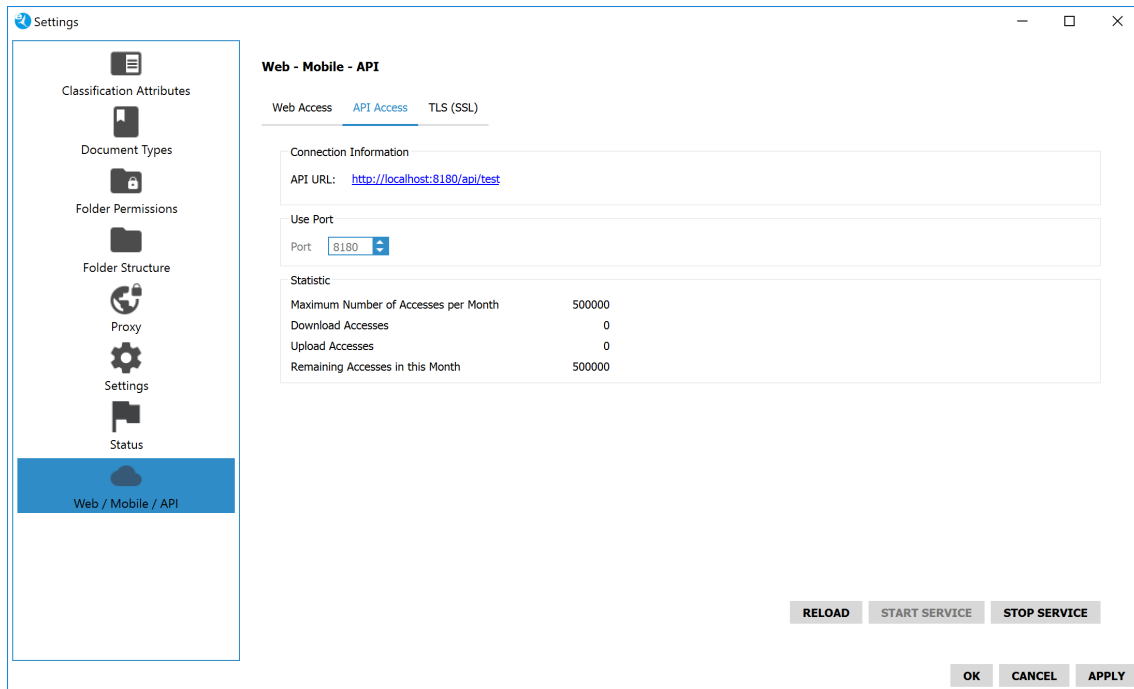
Figure 6.20: Settings: API Access (API REST Service)

6.9.3 TLS (SSL)

TLS means Transport Layer Security. This term is better known under the previous name Secure Sockets Layer (SSL). It is an encryption protocol for secure data transmission in the Internet. The SSL protocol is being developed and standardised for version 3.0 under the new name TLS. Version 1.0 of TLS is the same as version 3.1 of SSL.

Access to the web client and ecoDMS API can be done TLS (SSL) encrypted.
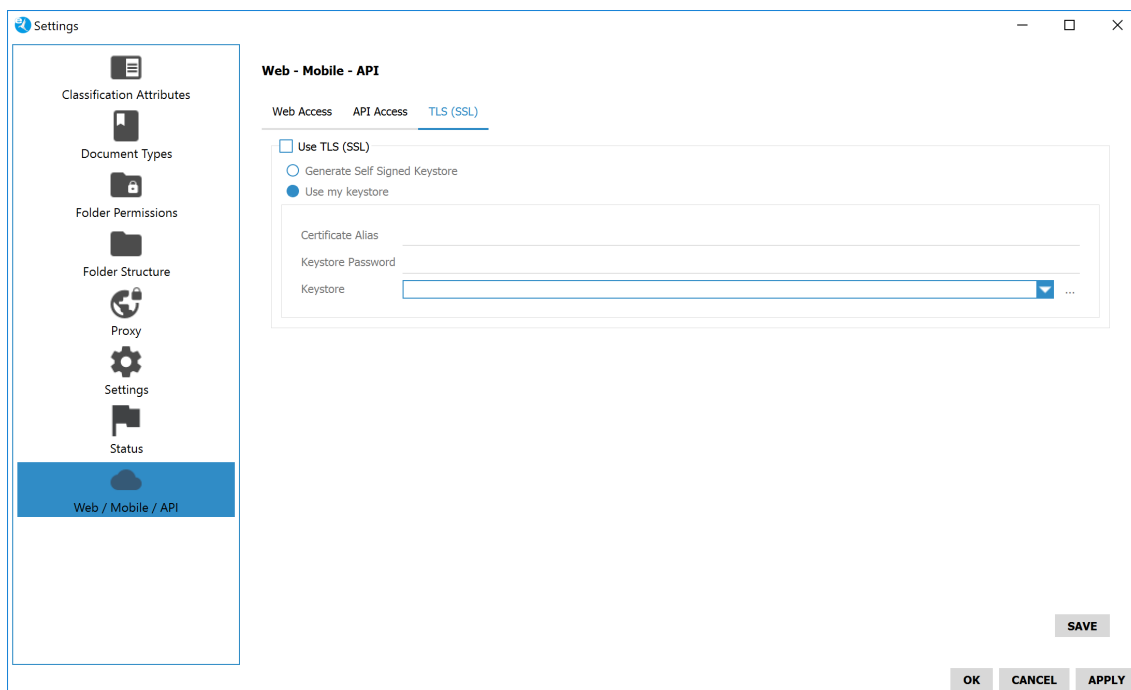
Figure 6.21: Settings: TLS (SSL)

6.9.3.1 Use a Self-Signed Certificate Generated by the System

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

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

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

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

4. Click "Apply" to save the process in the settings dialogue.

6.9.3.2 Use My Keystore

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

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

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

3. Click "Use my keystore".

4. Enter the following information:
   a) **Certificate Alias:** Enter the name of the certificate.
   b) **Keystore Password:** Enter the keystore password.
   c) **Keystore:** The keystore for the TLS (SSL) encryption must be in the format JSSE (Java KeyStore). Here the keystore is uploaded and selected.
      i. Click the button "..." to select the keystore on your filesystem.
      ii. Confirm your selection and upload the keystore.
      iii. Select the keystore from the list.

5. Click "Apply" to save the process in the settings dialogue.

6.10 Folder Structure: Additional Functions in ecoDMS

There are various functions and commands for the folders created in ecoDMS.
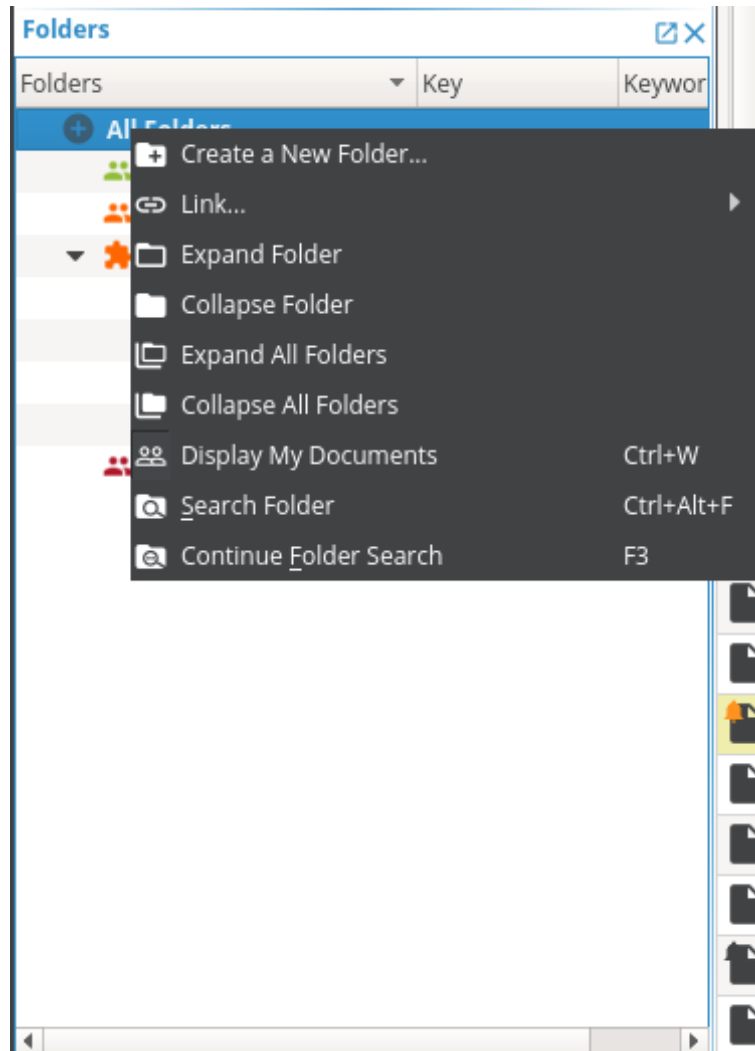
Figure 6.22: Folder Structure - Functions when right-clicking on a Folder

6.10.1 Create New Folder

You can also create folders directly through the Classification dialogue or the folder structure if you have the according permission. Complete the following steps [5, 2]:

1. Right-click the location in the folder structure where you want to create a new folder.

    a) To create a new main folder, click "All Folders".

    b) To create a subfolder, click the respective main folder.

2. Then click the "Create New Folder" function.

3. A dialogue opens. Enter the following information:

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

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

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

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

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

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

6.10.2 Skip to Folder

1. Select the document in the ecoDMS table.

2. Right-click the mouse and select "Skip to Folder".

3. The corresponding folder is selected in the "Folder" area. The documents in the folder that are visible to the user are displayed in the table.

6.10.3 Expand / Collapse Folders

Right-click on a folder in the folder structure you can expand and collapse the folders.

6.10.3.1 Expand Folders

To expand a single folder in the folder structure, complete the following steps:

1. Right-click on a folder in the folder structure.

2. Click "Expand Folder".

6.10.3.2 Collapse Folder

To collapse a single folder again, so that the proper subfolders are not visible at first sight, complete the following steps:

1. Right-click on a folder in the folder structure.

2. Click "Collapse Folder".

6.10.3.3 Expand All Folders

You can show all the subfolders within the folder structure so that they are visible. To do this, complete the following steps:

1. Right-click on a folder in the folder structure.

2. Click "Expand All Folders".

6.10.3.4 Collapse All Folders

You can collapse all subfolders within the folder structure again, so that they are not visible at first sight. To do this, complete the following steps:

1. Right-click on a folder in the folder structure.

2. Click "Collapse All Folders".

6.10.4 Order of the Folder Structure

You can change the order of the folders [3]:

1. In the folder structure, click the column header of the column you want to sort

    a) The arrow displays the sort direction (ascending or descending)

6.10.5 Hide Column(s)

The folder structure contains various columns:

1. Folders

2. Key

3. Keywords

Unused columns can be hidden in the client if necessary. To do this, complete the following steps [3]:

1. Right-click the header line in the "Folder" window (column names).

2. Select "Show/Hide Column(s)".

3. Disable the columns by removing the checkmark (tick).

6.10.6 Show Column(s)

The folder structure contains various columns:

1. Folders

2. Key

3. Keywords

If columns are hidden, you can display them again as follows [3]:

1. Right-click the header line in the "Folder" window (column names).

2. Select "Show/Hide Column(s)".

3. Enable the required columns by setting the mark (tick).

Important Information for Chapter 6

[1] *Aktuell enthält ecoDMS keine eigene Icon-Sammlung. Selbstverständlich können Sie Ihre eigenen Icons verwenden, sofern diese in den unterstützten Formaten vorliegen. Kostenfreie Icon Sammlungen (Beispiel Suchbegriff: OpenSource Icons) sind im Internet erhältlich. Hierbei gelten die Lizenzbestimmungen und Richtlinien der Urheber.*

[2] *Änderungen innerhalb des Einstellungsdialoges und in der Ordnerstruktur sind stets für alle Benutzer gültig. Um diese sichtbar zu machen, ist vom jeweiligen Benutzer entweder ein Neustart des Clients oder ein Klick auf den Button "Arbeitsfläche neu laden" notwendig.*

[3] *Bitte beachten Sie, dass diese Einstellungen auf den jeweiligen Arbeitsplatz bezogen sind und nicht im Benutzerprofil gespeichert werden.*

[4] *Die Anlage und Verwendung von Benutzergruppen wird empfohlen. Das erleichtert die Klassifizierung und Zuordnung enorm.*

[5] *Diese Funktion setzt zur Ansicht und Nutzung bestimmte System-Berechtigungen voraus.*

[6] *Jede ecoDMS-Vollversion Lizenz beinhaltet monatlich automatisch zehn API Connects, die zum Up- und Download von Dokumenten über die API genutzt werden können. Weitere API Connects können bei Bedarf im Onlineshop erworben werden.*

[7] *Status, Ordner und Dokumentenarten können nur gelöscht werden, wenn keine Dokumente (auch nicht im Papierkorb) zugeordnet sind.*

7 Archiving

This chapter describes the different archiving methods with ecoDMS Client.

- There are different ways of archiving documents in ecoDMS (via ecoDMS Client, ecoDMS Web Client, side panel, drag & drop, Plugins, Plugins, scanning...).
- When archiving, the files must be on a local hard disk.
- Network drives (share directories) are only supported during archiving if they are an immediate part of the system.
- Direct archiving is not possible from a simple shared directory.
- ecoDMS always stores archived files in the original format.
  - Office documents or emails are only converted to PDF/A format when archiving with the respective ecoDMS Plugin / Plugin.
  - Moreover, ecoDMS converts TIFF, PNG, JPG and non-readable PDF files to a full-text searchable PDF file per default.

7.1 Function: Archiving

You can select and archive one or more documents from your file system [4, 5, 6, 2].

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

Figure 7.1: Icon - Archive

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

3. To load the file(s), click "Open".
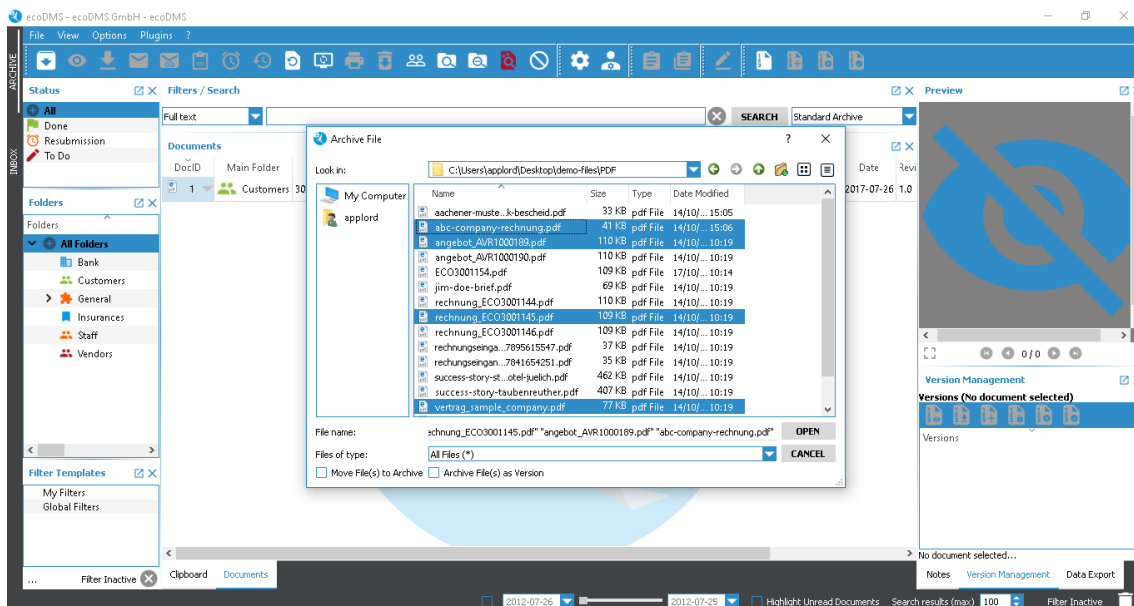
Figure 7.2: Archive File(s)

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

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

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

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

   – **No classification:** (Method is not recommended.) The documents are archived but not classified. However, the documents can also be classified later.
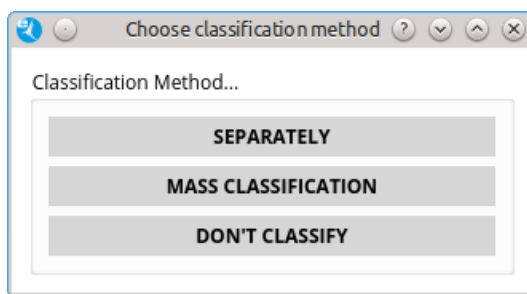
Figure 7.3: Select Classification Method

7.2 Drag and Drop

You can move documents into ecoDMS with the drag & drop function [4, 5, 6, 2].

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

2. The following additional functions are available:

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

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

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

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

    c) You can also combine both shortcuts.

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

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

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

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

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

        – **No classification:** (Method is not recommended.) The documents are archived but not classified. However, the documents can also be classified later.
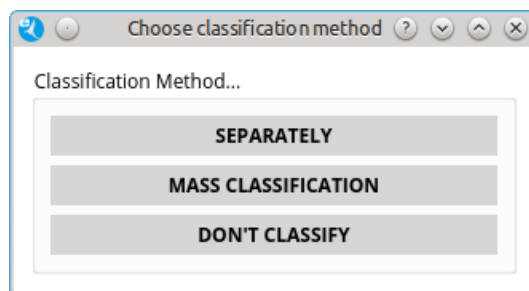
Figure 7.4: Select Classification Method

7.3 Move File(s) to Archive

You can archive files in ecoDMS and simultaneously delete them from the data carrier or the file system. To do this, ecoDMS has the following functions[4, 5, 6, 2]:

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

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

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

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

2. **Archiving using the dialogue**

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

        i. ecoDMS archives the file(s) as versioned document(s), so that you can add more versions to the archived document.
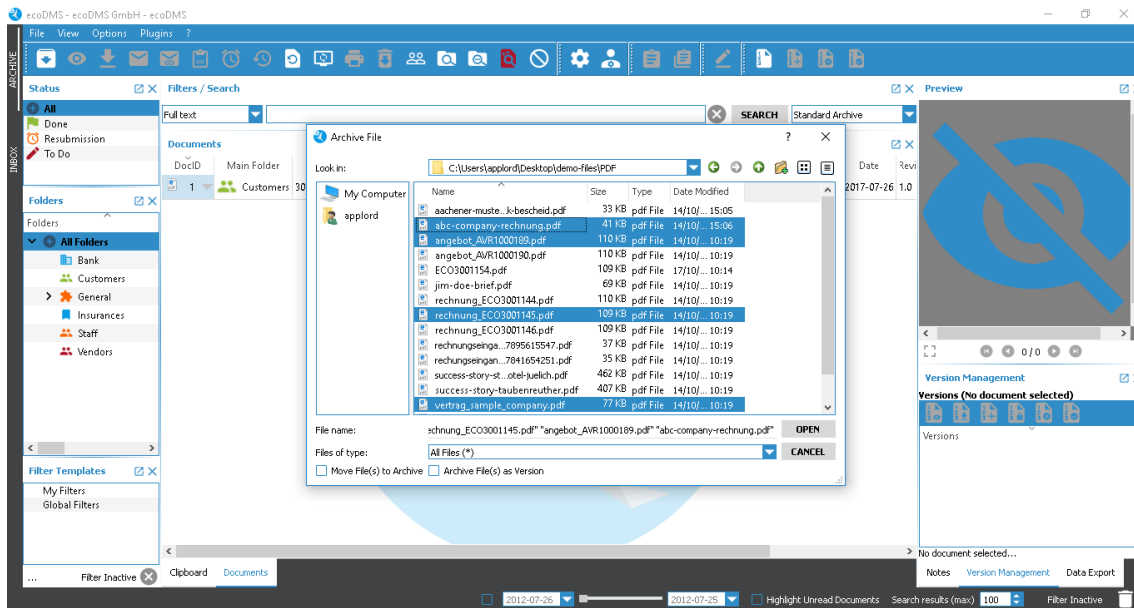
Figure 7.5: Move File(s) to Archive

7.4 Archive File(s) as Version

You can archive documents in ecoDMS in a way that allows you to add more versions to them later on. To do so, ecoDMS has the following options:

1. **Drag and drop from the file system**

   a) Select one or more documents in the file system

   b) Press and hold the Alt key and drag and drop the document(s) into ecoDMS
      – straight into the table view
      – straight onto a folder in the folder tree

2. **ecoDMS Function**

   a) Execute the "Archive" function. To do so, you have the following options:

      i. **Menu**: Click "File - Archive" in the menu

      ii. **Icon**: Click the "Archive" icon on the toolbar

      iii. **Right mouse-click:** In the ecoDMS table: Right-click - "Archive"

      iv. **Keyboard shortcut:** CTRL + A

   b) Select one or more documents in the file system dialogue and enable "Archive File(s) as Version"
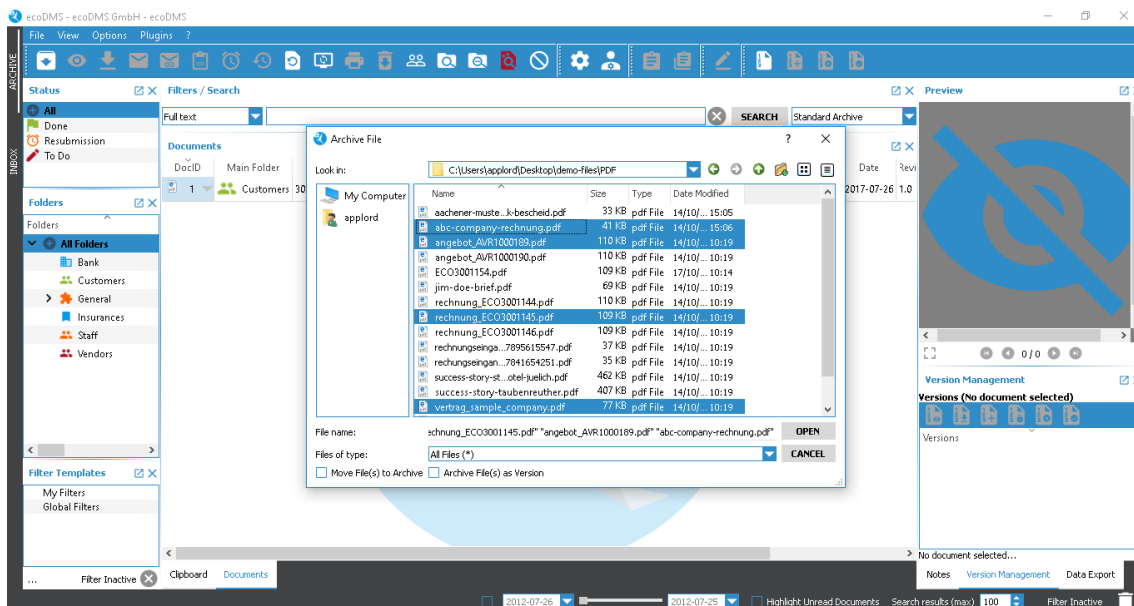
Figure 7.6: Archive File(s) as Version

3. **Office and Email Plugins**

   There is a separate entry in this manual about how to use the ecoDMS plugins.

4. **Archiving with Version Management**

   There is a separate chapter in this manual about how to use the Version Management.
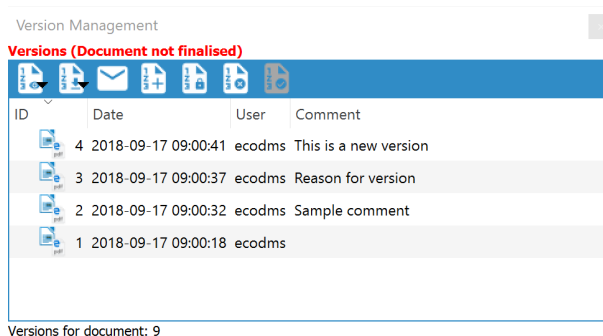
Figure 7.7: Window - Version Management

Important Information for Chapter 7

[1] *Bitte beachten Sie, dass diese Einstellungen auf den jeweiligen Arbeitsplatz bezogen sind und nicht im Benutzerprofil gespeichert werden.*

[2] *Die Vorschau im Klassifizierungsdialog wird nur bei PDF Dokumenten und bei Dateien, die über die ecoDMS Plugins oder den PDF/A Drucker archiviert werden, angezeigt.*

[3] *Diese Funktion setzt eine Lizenz der ecoDMS-Vollversion voraus, kann aber in der Demozeit getestet werden und wird anschließend automatisch deaktiviert, bis eine Lizenz eingespielt wird.*

[4] *Diese Funktion setzt zur Ansicht und Nutzung bestimmte System-Berechtigungen voraus.*

[5] *Ist in ecoDMS ein Ordner aktiv ausgewählt, wird dieser bei der Klassifizierung automatisch übernommen.*

[6] *Nach der Archivierung werden automatisch PDF, TIFF, JPG und PNG Dateien zusätzlich in das (lesbare) PDF/A Format umgewandelt. Die Dauer und Durchführbarkeit ist abhängig von der Qualität und Größe der Datei. Nach erfolgreichem Abschluss der Umwandlung kann das PDF/A geöffnet werden. Solange bleibt die Originaldatei bestehen. Das PDF/A kann über die Tabelle abgerufen werden. Die Originaldateien über die Versionsverwaltung. Office Dateien und E-Mails werden über die ecoDMS-Plugins im Original und als PDF/A abgelegt.*

7.5 Side Panel

The side panel is placed on the right of the screen after you have enabled it in the Connection Manager. You can drag and drop files into the panel. Depending on the selection, ecoDMS executes automatic pre-classification and archiving.

- When archiving, the files must be on a local hard disk.
- Network drives (share directories) are only supported during archiving if they are an immediate part of the system.
- Direct archiving is not possible from a simple shared directory.
- ecoDMS always stores archived files in the original format. Office documents or emails are only converted to PDF/A format when archiving with the respective ecoDMS Plugin / Plugin. Moreover, ecoDMS converts TIFF, PNG, JPG and non-readable PDF files to a full-text searchable PDF file per default.
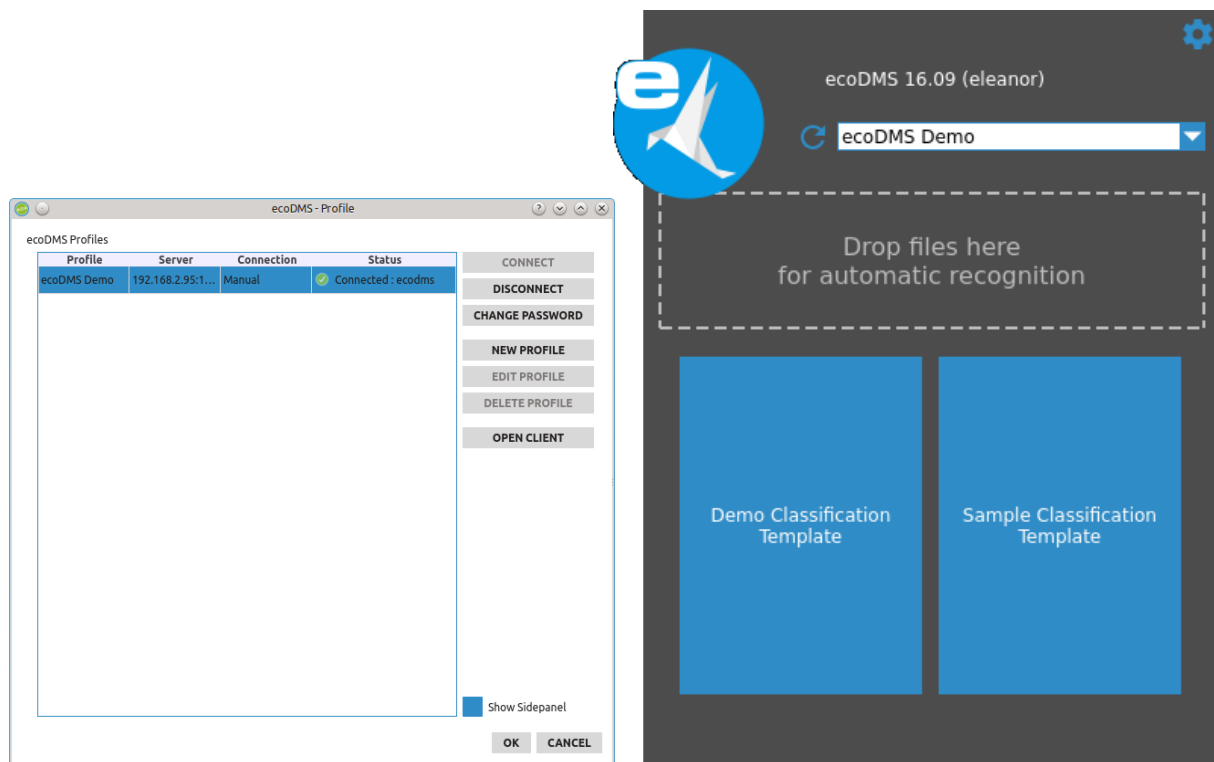
Figure 7.8: Side Panel and Activation via Connection Manager

7.5.1 Enable / Disable Side Panel

Use the Connection Manager to activate the Side Panel in a workstation. Complete the following steps [1, 3]:

1. Open the Connection Manager at your workstation.

2. Enable the function "Show Side Panel".

3. The side panel is placed on the right of the screen after you have enabled it in the Connection Manager.

a) You can hide or display it as required with a single click.

b) To disable the side panel, deactivate the function.

7.5.2 Enable Classification Templates

By default, ecoDMS displays all available classification templates in the side panel. In the settings dialogue, you enable or disable the displayed templates in the side panel of your workstation. To do so, complete the following steps:

1. Extend the enabled side panel.

   a) To do so, just click the partially visible ecoDMS logo at the right edge of your screen.

2. Click the Settings icon (cogwheel) at the top right of the side panel.

3. Enable or disable the classification templates, as required.

   a) All enabled templates are displayed in the side panel.

   b) The other templates remain enabled but are not available for selection in the side panel.

Figure 7.9: ecoDMS Logo (Only Partially Visible on the Edge of the Screen)

Figure 7.10: Settings Icon in the Side Panel (Cogwheel)

7.5.3 Specify Target Profile

Depending on the setting, you can configure and link several profiles in the Connection Manager. Before you finally archive a document, make sure the correct profile is selected for archiving.

1. To do this, select the profile in the respective list in the side panel.
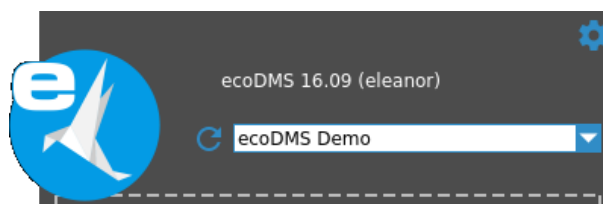
Figure 7.11: Side Panel - Select Target Profile

7.5.4 Automatic Archiving (Dark Process)

You can drag documents to a specific classification template in the Side Panel. The documents are then automatically archived without any need for action by the user. During classification ecoDMS fills in the recognised attributes according to the selected template.

1. Drag the document you want to archive onto the blue box of the required classification template in the side panel.

2. ecoDMS automatically classifies and archives the document in the background.

3. During the assignment process, all attributes that match the specifications in the classification template and/or can be assigned based on the template, are populated.

Figure 7.12: Side Panel - Automatic Archiving (Dark Process)

7.5.5 Automatic Pre-Classification (Classification dialogue)

During archiving via the Side Panel, the matching classification template can also be determined by the system. Complete the following steps:

1. Drag the file you want to archive to the selected field for automatic pre-classification in the Side Panel.

2. Then the Classification dialogue opens.

   a) If one or more matching templates were found, the assignment of the recognised attributes will be carried out automatically.

3. Check the displayed classification.

   a) As an option you can make changes and/or remove the irrelevant tabs if one or more matching templates were found.

4. Complete the archiving process with "OK".
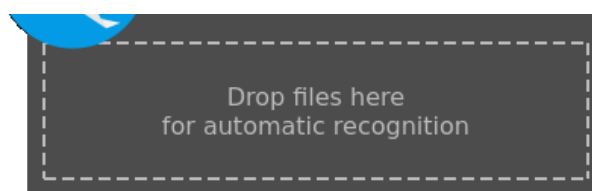
Figure 7.13: Side Panel - Automatic Classification Recognition

8 Inbox

Immediately after the scanning process, you can retrieve the documents via Inbox of ecoDMS Client. On the tab there are several functions available to process your emails, for example, rotate, delete, move.

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

1. Before you archive, ensure that the individual pages are the right way around.
   a) The text should always be readable from left to right. This is important for the full text indexing.
   b) If necessary, you can turn the pages in the Inbox.
2. You can either perform the scanning process via ecoDMS scaninput folder or the TWAIN/WIA/SANE interface.
3. The scaninput folder is configured automatically with ecoDMS Server.
   a) It allows scanning within the network.
   b) Moreover, it is possible to assign specific configurations and permissions for this folder.
   c) You can also create more scaninput folders with different configurations, if necessary.
4. The inbox can receive PDF and TIFF files, whereby incoming TIFF files are automatically converted to PDF files in a background process and are then displayed as PDF.
5. The Inbox provides several different editing functions. You can copy, cut and paste pages.
   a) Depending on the structure and type of a PDF file, the file can suppress these functions.
6. In the archiving process, the scanned documents are saved in ecoDMS in their original format and also as searchable PDF/A documents.
7. Basically you can use any network scanner and any USB scanner which have the "Scan-to-Folder" function to scan into the scan-input folder of ecoDMS.
8. In addition, you can use numerous scanners, which have a TWAIN/WIA interface, to directly scan into the scan-programme.
9. The device must have PDF and/or TIFF as scan formats.
10. It is best to scan in the documents in black and white (black-white= 1-bit colour depth) or in shades of grey with 200-300 DPI.
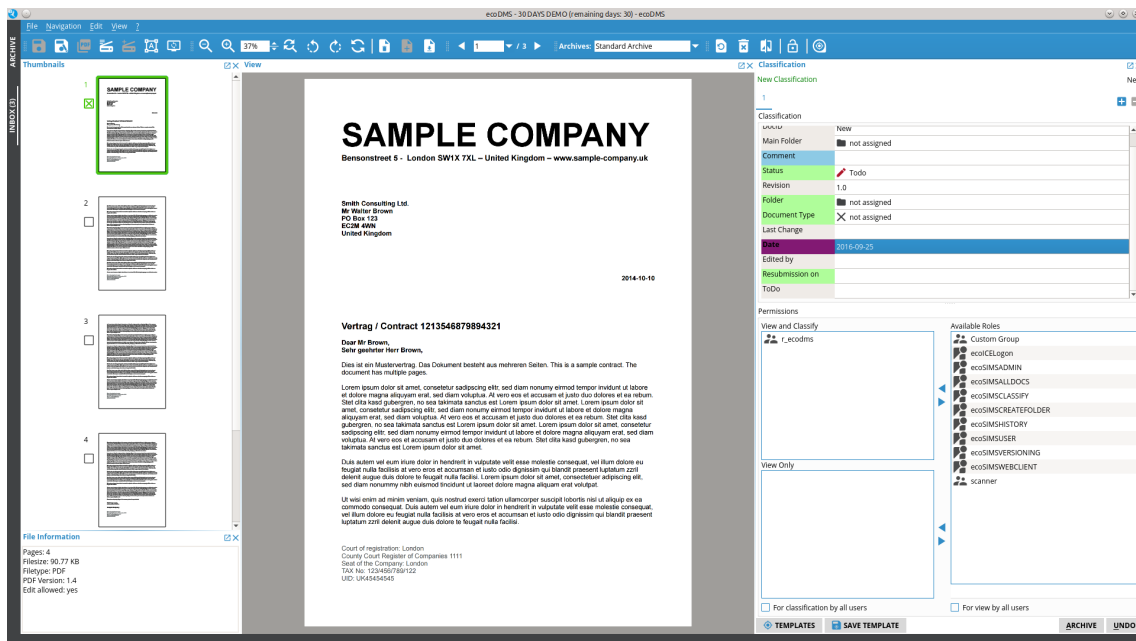
Figure 8.1: ecoDMS Inbox Tab
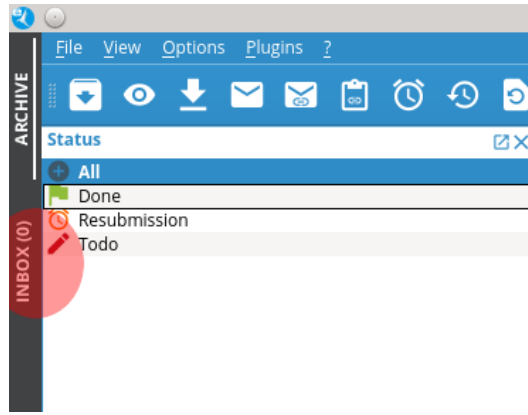
Figure 8.2: Skip to ecoDMS Inbox Tab

8.1 Separator Pages

We recommend the use of separator pages so that you can batch scan documents without having to separate them manually afterwards. Separator pages signal to the system that a new document is about to begin. The system automatically splits the documents and reads them in individually. In the software download area of the ecoDMS website, you can find a print template for such a separator page. ecoDMS recognises separator pages and empty pages if this function is not disabled.

1. Print the two-page document double-sided (as many as required), so that the letter "T" is on the front side and on the reverse side of a DIN-A4 sheet (duplex method).

2. Before scanning, always insert a separator page at the end of a one or multi-page document and insert the next document behind it.
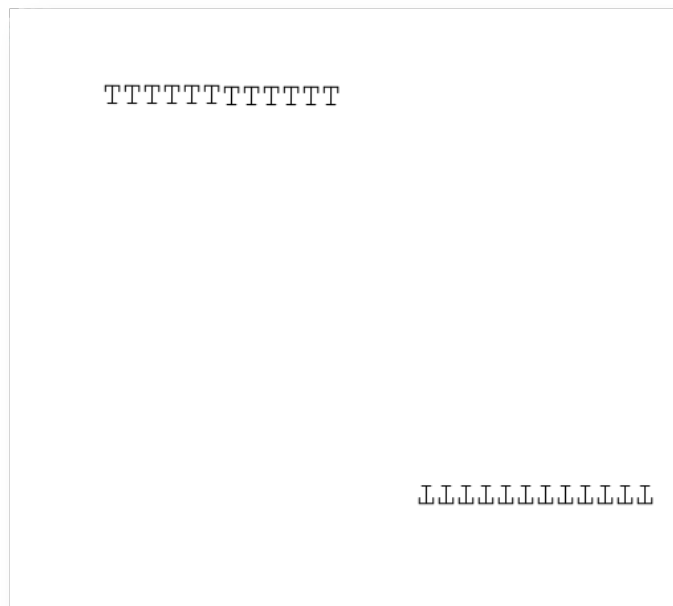
Figure 8.3: Separator Page

8.2 Scaninput: Management

The scaninput folder of ecoDMS allows a server-side scanning process. This means you can, for example, send documents to this folder on the ecoDMS Server from a network-compatible scanner. The scaninput folder calls the scanned documents, splits them into individual files where it detects separators, and transfers them to the inbox in ecoDMS Client. If classification templates with automatic archiving are enabled, the recognized documents are transferred straight to ecoDMS for final archiving.

ecoDMS has a scaninput folder by default. If you have a full version, the ecoDMS administrator can add more folders if required [5, 4].
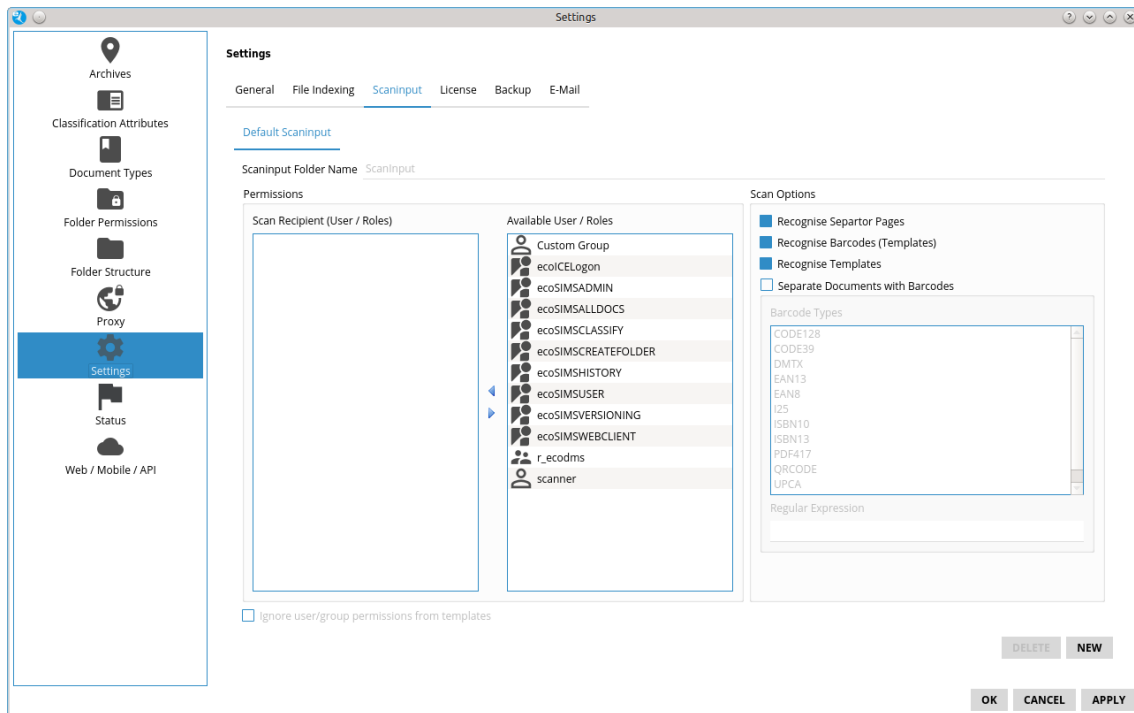
Figure 8.4: Settings - Settings - Scaninput

8.2.1 Create Scaninput Folder

The administrator can configure up to 20 more scaninput subfolders with different permissions and configurations in the settings dialogue of ecoDMS. To create a new scaninput folder, complete the following steps[4, 5]:

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

2. Click "New".

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

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

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

5. Click "Apply" to save the process in the settings dialogue.

6. You can create a total of 20 scaninput subfolders in this way.
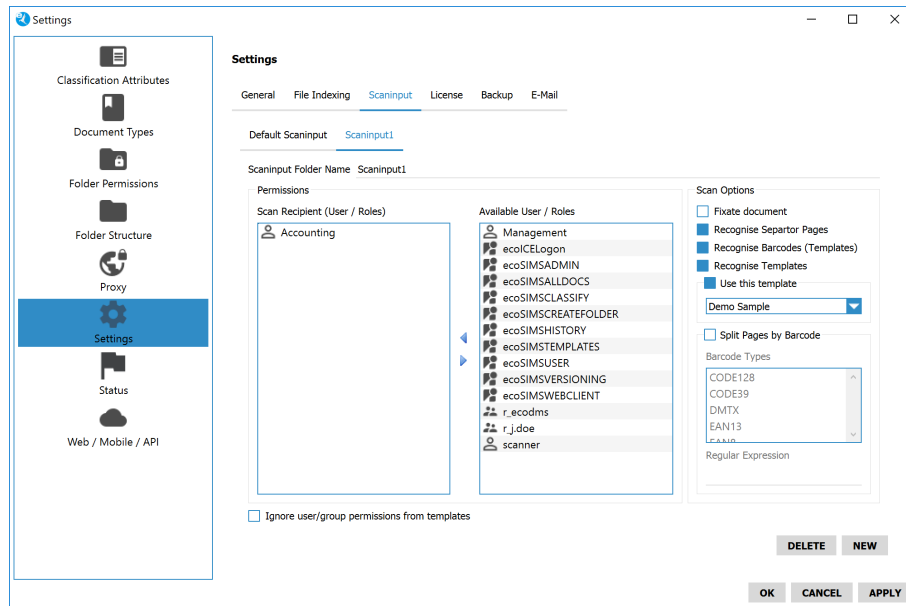
Figure 8.5: Settings - Settings - Create Scaninput

8.2.2 Scan Options

For each scaninput folder you can define different scan options:

8.2.2.1 Finalise Document

Per default, all documents archived through the scaninput folder are archived with the "Not Finalised" status. This means that you have the option to add further versions through version management in ecoDMS Client (not via inbox). To archive these documents as "Finalised", thus preventing the addition of further versions, you can select the "Finalise Document" function for the affected scaninput folder.

8.2.2.2 Recognise Templates

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

8.2.2.3 Use This Template

To assign the same classification to all documents that are archived through a scaninput folder, you can select a dedicated classification template. This is then automatically applied to all incoming documents via the scaninput folder. In this case other matching classification templates are ignored. The system exclusively uses the selected template for all incoming documents in this scaninput folder.

8.2.2.4 Recognise Separator Pages

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

8.2.2.5 Recognise Barcodes (Templates)

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

8.2.2.6 Separate Documents with Barcodes

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

1. First, enable the "Recognise separator pages" function.

    a) This function is the prerequisite for separating pages via barcode.

2. Enable the function "Separate Documents with Barcodes".

3. Select one or more barcode types that ecoDMS should recognise.

4. **Optional experts function:** As an option, you can further limit and describe the barcode by entering regular expressions. The following expressions serve as an example:

    a) Barcode starts with

    ```
    TEXT(.*)
    ```

    b) Barcode contains

    ```
    (.*)TEXT(.*)
    ```

    c) Barcode ends with

    ```
    (.*)TEXT
    ```

    d) Barcode starts with "VC", followed by 5 digits and ends with "-V01"

    ```
    VC[0-9]{5}\-V01
    ```

8.2.3 Permissions (Scan Recipients)

Each scaninput folder can be given a separate permission. The scanned documents are then visible for the stored scanning receiver only.

1. If the Scan Recipients window remains empty, the documents which were scanned via this folder are visible to all users in the Inbox.

2. If users and/or groups are dragged into the Scan Recipients field, the documents scanned via this folder automatically receive the permission stored there, and are thus only visible for these users.

    a) Exception: Users with the role "ecoSIMSALLDOCS". They can view all documents / folders independent of their permissions.

8.2.4 Ignore Users / Groups of Templates

Here you can specify how to handle permissions from classification templates (templates designer) if you set additional scaninput folder permissions.

1. **Function enabled:** If you enable this checkbox, documents are pre-classified as usual when ecoDMS recognises a classification template. However, the permission in a template is removed and replaced by the permission stored in the scaninput folder.

2. **Function disabled:** If you do not enable the "Ignore Users / Group Permissions from Templates" checkbox, the permissions stored in the template continue to apply when a classification template is recognised. If the "Classification Template" does not contain the user who scanned the document, the document is not visible to this user in the Inbox.

8.2.5 Assign Classification Template

You can save a classification template for each scaninput folder. The classification template loads by default as soon as a scanned document reaches the inbox via the scaninput folder.

8.2.6 Delete Scaninput Folder

Custom scaninput folders can also be deleted. In this case the folders are removed in the settings dialogue. The Standard scaninput folder cannot be deleted. To delete, complete the following steps [5, 4]:

1. Select the tab "Settings - Scaninput" in the settings dialogue.

2. Select the "scaninput folder" tab you want to delete.

3. Click the "Delete" button.

   a) The "scaninput folder" is now deleted in the settings dialogue.

   For safety reasons, the folders remain in the file system. To delete the folders in the file system, the administrator merely needs to select the folder in the file system and remove it manually. **Before deleting, ensure that there are no documents in the "scaninput folder".**

4. Click "Apply" to save the process in the settings dialogue.

8.3 Scaninput: Scan Documents

- The scaninput folder of ecoDMS allows a server-side scanning process. This means you can, for example, send documents to this folder on the ecoDMS Server from a network-compatible scanner. The scaninput folder calls the scanned documents, splits them into individual files where it detects separators, and transfers them to the inbox in ecoDMS Client. If classification templates with automatic archiving are enabled, the recognized documents are transferred straight to ecoDMS for final archiving.
- ecoDMS recommends the scaninput folder as the scanning method because only this method executes all server-side processes (including automatic template recognition).

8.3.1 Target Path for Scaninput Folders

In order to access this folder, the permissions must be adjusted accordingly. The scaninput folder is stored at the specified data path that was chosen during the installation of ecoDMS Server:

1. Under Ubuntu/Debian it is always at:

   ```
   /opt/ecodms/workdir/scaninput
   ```

2. Standard Windows:

   ```
   \%ProgramData%\ecodms\workdir\scaninput
   ```

If you have created custom scaninput folders, they are subfolders in the respective data path.

8.3.2 Scan Process

1. In your scanner, setup the destination path for the scaninput folder to which you want to scan the documents.

2. Scan you documents to the "Scaninput Folder".

3. ecoDMS receives the documents from the scaninput folder after just a few seconds.

   a) This is the reason why the documents are displayed in the folder just for a few seconds.

   b) It can take a few minutes to retrieve the documents, depending on the file size.

8.3.3 Manual Access

Completed TIFFs or PDFs can also be stored manually in the folder.

1. Access from your workstation to the desired scaninput folder. To do this, use the address of the destination path.

2. Insert the PDF and / or TIFF files in the scaninput folder.

3. The client receives the documents after just a few seconds from the scaninput folder.
   a) This is the reason why the documents are displayed in the folder just for a few seconds.
   b) Depending on the file size, it can take a few minutes to request the documents via the client.

8.4 TWAIN/WIA/SANE: Scan Documents

You can scan documents straight to the ecoDMS inbox via a TWAIN/WIA/SANE interface.

- The TWAIN/WIA/SANE interface is compatible with many but not all scanner models.
- If you scan via TWAIN/WIA/SANE interface, the pre-classification is only possible via the function "Search Matching Classification Template".
- You can only scan TIFF files with this interface.
- The Scaninput folder is recommended as the scanning method because only with this method all processes on the server (including automatic template recognition) can be carried out.

8.4.1 Select Scanner

To use the interface, you have to select a scanner. Complete the following steps [3, 2]:

1. Click the menu "File - Scan - Select Scanner"
   a) The Select Scanner dialogue opens.

2. Choose from the list of available scanners the required device.

3. Confirm this process with "OK" or cancel it with "Cancel".

8.4.2 Configure Scanner

After you have chosen a scanner, you have to configure it. Complete the following steps:

1. Click the menu "File - Scan - Settings"
   a) The "Scanner Options" dialogue opens.

2. Select the matching scanner log according to the operating system and the scanner.
   a) TWAIN
      i. WIA
      ii. SANE
      iii. ...

3. Enable the required functions for the scan process in the "Options".
   a) **Rotate pages automatically**
      i. The system automatically rotates pages that were scanned in upside down. Enable this function for the rotation process.
   b) **Suppress empty pages**

        i. The system can automatically detect and remove empty pages. Enable this function for the rotation process.

   c) **Detect separator pages**

        i. To scan in several documents simultaneously, we recommend you use the official ecoDMS separator pages for document separation. The software splits the documents automatically into individual files. Enable this function to detect the separator pages.

   d) **OCR durchführen**

        i. Die OCR-Erkennung wandelt die eingescannte TIFF-Datei in ein durchsuchbares PDF um.

4. Confirm your configuration with "OK" or cancel it with "Cancel".
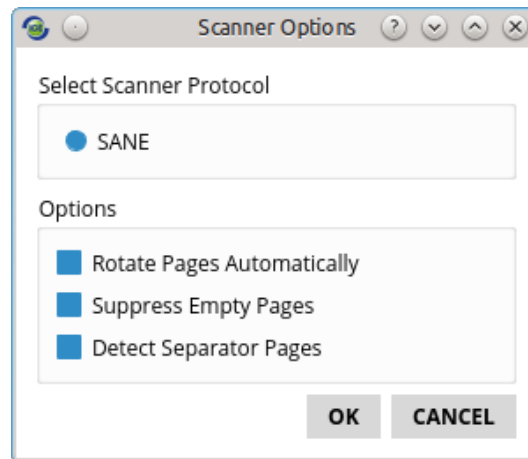
Figure 8.6: Scanner Options

8.4.3 Scan New Document

To scan a completely new document, complete the following steps [3, 2]:

1. Select the function "Scan New Document" with one of the following options:
   a) Click the menu "File - Scan - Scan New Document" **or**
   b) Click the toolbar icon "Scan New Document" **or**
   c) Enter this shortcut: F10

2. If several scanners are connected, you must select a source in the next step.
   a) If only one scanner is connected, the respective scanner window opens. The window is different for different scanners.

3. Start scanning process.

4. The scanned pages are loaded as a new document in the last position in the Inbox.

Figure 8.7: Icon - Scan New Document

8.4.4 Add Pages to Document

To scan a completely new document, complete the following steps [3, 2]:

1. Call up the document in the client.

2. Select the function "Add Pages to Document" with one of the following options:

   a) Click the menu "File - Scan - Scan New Document" **or**

   b) Click the toolbar icon "Scan New Document" **or**

   c) Enter this shortcut: F10

3. If several scanners are connected, you must select a source in the next step.

   a) If only one scanner is connected, the respective scanner window opens. The window is different for different scanners.

4. Start scanning process.

5. The scanned pages will be added to the existing document.

Figure 8.8: Icon - Add Page(s) to Document

8.5 Request Scans

After scanning, the scanned documents are retrieved via the Inbox and prepared for archiving. When starting the programme, the available documents are loaded automatically one after the other. While working with the Inbox, the user can also request the documents manually. To display the scanned documents in ecoDMS, they must first be classified and archived through the Inbox.

To view and update the documents and classifications manually in the Inbox, you have the followings options:

1. To do this, click the icon "Request Documents (F5)" on the toolbar **or**

2. Enter this shortcut: F5 **or**

3. When the Inbox restarts, it automatically retrieves and updates the documents and classifications.

Figure 8.9: Icon - Request Documents

8.6 Display Overview of All Scans

The "Inbox Overview" window offers an overview of all documents available to the user in the inbox. Scanned documents are displayed as a preview. Apart from the document preview, the overview displays the number of pages in a file. There is also an option to remove documents that are not required. This is possible because the inbox is not the final archive but a preliminary step.

1. Click the Overview icon on the toolbar to open the preview of all available documents in the inbox.

Figure 8.10: Display Overview of All Scans (Icon)

2. Click the icon to open an overview of all documents in the inbox that are available for this user.
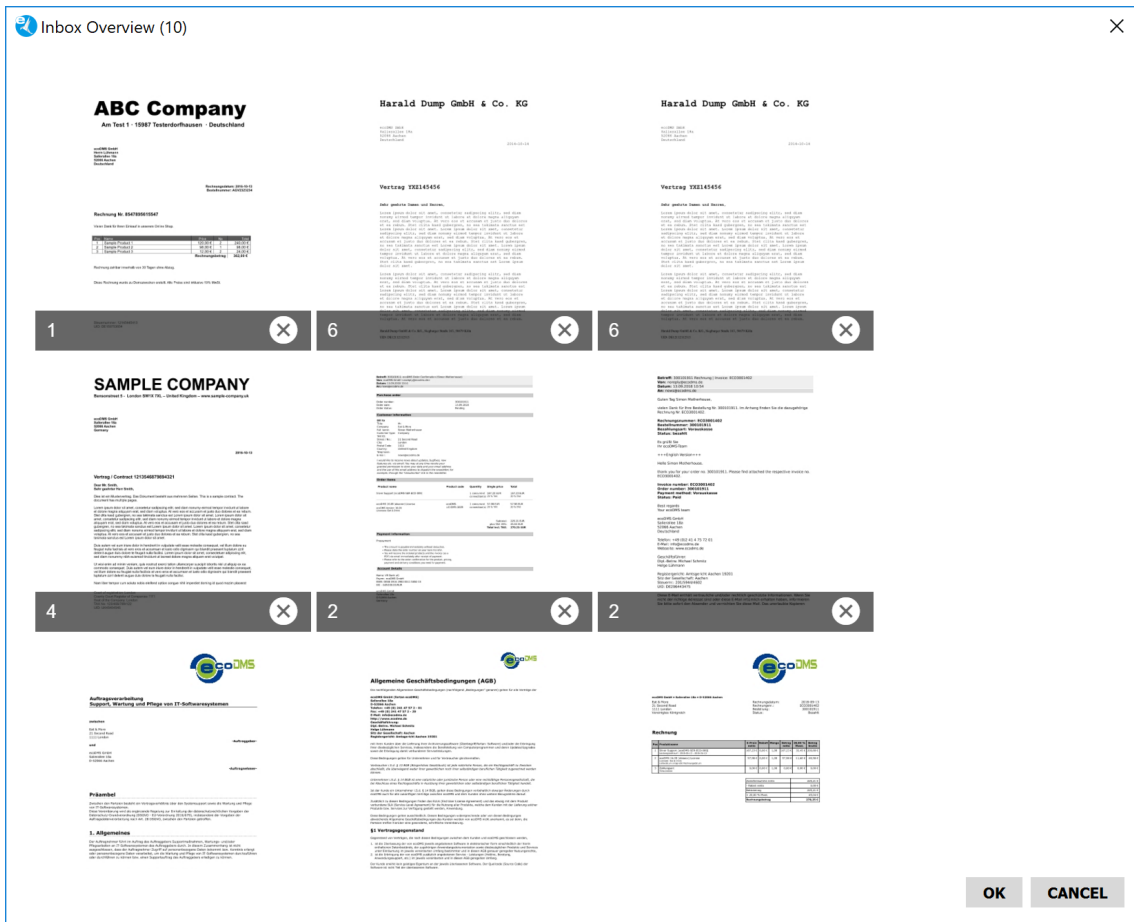
Figure 8.11: Overview of All Scans

8.6.1 Delete Documents

Documents that are not required can be removed from the inbox and deleted irrevocably. This is possible because the inbox is not the final archive but a preliminary step. You cannot undo this operation. To restore deleted documents, you must scan them again and retrieve them through the inbox. This is how to delete a document from the inbox via the overview:

1. Click the X icon below the document you want to delete.

2. Confirm the confirmation prompt with "Yes" or abort the deletion process with "No".

8.7 Classification

Via Classification you can assign, for example, the virtual destination folder in ecoDMS, the document type, the status, the responsibilities and many more archiving details to each file you archive. These details allow documents to be systematically filed and easily retrieved through keyword search as an alternative and/or in addition to the full-text search.

- You can classify scanned documents in the Classification dialogue of the Inbox.

- The Classification dialogue is described in detail in the respective chapter of this manual.

8.7.1 Copy & Paste Content & Barcodes

You can select document content or a barcode from the document, and copy it for the classification. To do so, complete the following steps:

1. In the Classification dialogue, select the input or date field to which you want to copy the contents or the barcode information.

2. The following options are available for copying content:

   a) Overwrite existing text in the attribute of a free text field (for example, comment):
      Press the Ctrl key and Right-click an area to select it in the scanned document.

   b) Add texts to an existing text in the attribute of a free text field (for example, comment):
      Press the Ctrl key and the Shift key and Right-click an area to select it in the scanned document.

   c) Barcode in a document can be decoded and entered as text:
      To decode barcodes in a document, press and hold the Ctrl + Alt keys and select the area while pressing the right mouse button.

Figure 8.12: Icon - Copy Text from Document
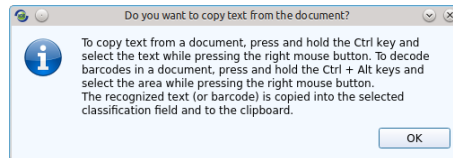
Figure 8.13: Explanation: Copy Text from Document

8.7.1.1 Date Formats

ecoDMS recognises the following date formats:

1. yyyy.MM.dd

2. dd.MM.yyyy

3. dd.MM.yy

4. dd. MMM yyyy

5. dd. MMMM yyyy

6. dd MM yyyy

7. dd MMMM yyyy

8. dd.MMyyyy

9. ddMMyyyy

10. ddMM.yyyy

8.7.2 Default Classification (For User Workstation)

To classify scanned documents, you can define a default classification on your workstation. This is loaded per default when a document is scanned in and retrieved with the Inbox at your workstation.

- The default classification is loaded exclusively in the Inbox at your workstation if no other classification template is recognised.
- If you select the "Reset Classification" function in the Classification dialogue, the default classification will not be loaded again for the next documents.
- Please note that these setting refer to the individual workstation and is not stored in the user profile.
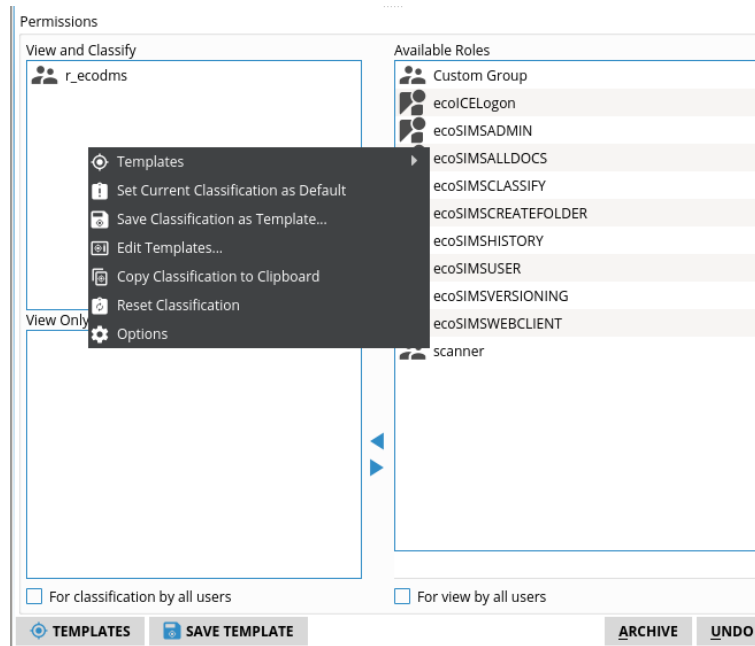
Figure 8.14: Set Default Classification in Inbox

8.7.2.1 Create Default Classification

To create a default classification for your workstation, complete the following steps:

1. In the Inbox Classification dialogue, specify the classification information and/or the permissions which you want to store as the default settings.

2. Right-click the "Permissions" window.

3. Click "Specify current classification as default".

8.7.2.2 Delete Default Classification

If you defined a default classification at your workstation, you can delete it again if necessary. For future classifications, the default classification will no longer be loaded in the Inbox. To delete a default classification at your workstation, complete the following steps [1, 5]:

1. In the Classification dialogue, go to any document in the Inbox with the mouse.

2. Right-click the "Permissions" window.

3. Click "Reset Classification".

8.7.3 Search Classification Templates

In the inbox you can either classify manually via the Classification dialogue or automatically via a classification template. If required, you can manually search and load a matching classification template. To do this, you have the following options:

– Click the icon "Search Matching Classification Template" in the toolbar of the inbox.

– Press the "F4" function key on your keyboard.

In both cases the system searches for a matching classification template and populates the attributes accordingly.

Figure 8.15: Search Classification Template in the Inbox (Icon)

8.8 Archive Scanned Documents

To archive the scanned documents via the Inbox, complete the following steps:

1. Click the button "Archive" in the Classification dialogue.

– This process cannot be undone.

– Later changes to the document are now no longer possible because of audit-proof.

---

2. The documents are archived as "Finalised" files. You can add any versions.

– After the archiving process, the scanned PDF or TIFF files are automatically converted into the (readable) PDF/A format.

– The quality and size of the file determine the conversion time and the feasibility.

– After successful conversion, the PDF/A can be opened in ecoDMS Client. Until then the original file remains.

– You can open the PDF/A via the table. You can retrieve the original files via the version management function.

Figure 8.16: Classification & Archiving via Inbox

8.9 Display Statistics

> This function is exclusively available to ecoDMS administrators.

The statistics document and display the processes of a scanned document in a flow chart. Using the statistics, you can trace each step of the route a document takes from scanning to archiving. The documents are displayed in the statistics until they are archived. To open the statistics, complete the following steps:

1. In the menu bar, click "Edit - Display Statistics".

2. The Statistics dialogue opens.

- **Process list:** In this area, select the document whose processes you want to view.
- **Reload Process List:** Clicking this button refreshes all available processes.
- **Reload View Clicking:** this button refreshes the view for the selected process.
- **Reload View Automatically:** Enabling this function automatically refreshes the progress of the respective document processes.

Figure 8.17: Statistics
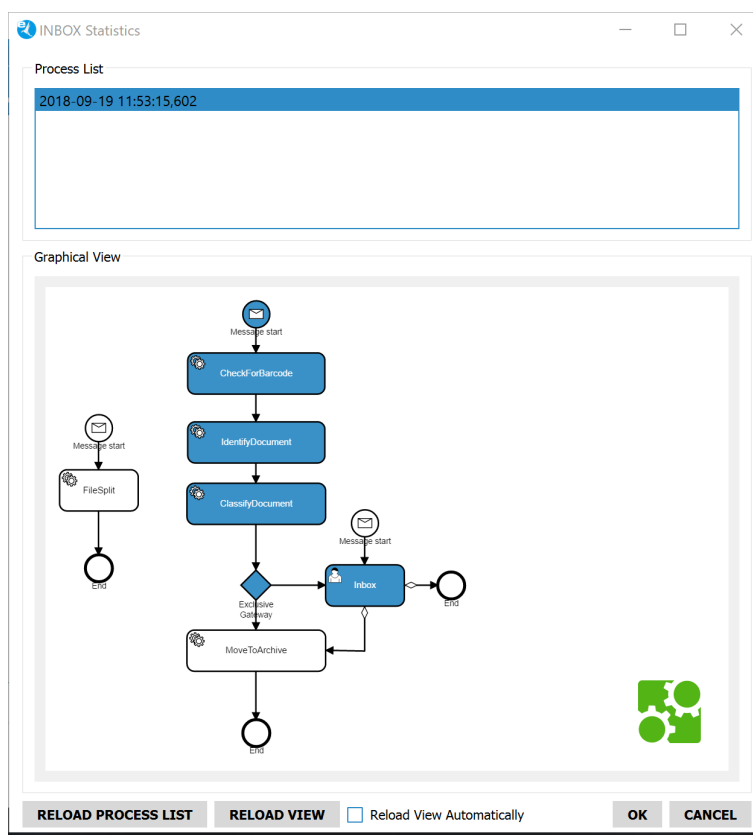
Figure 8.18: Inbox - Statistics (Example)

8.10 Next Document

The documents are loaded and displayed one after the other in this application. You can switch between the documents. To skip to the next document, you have the following options:

1. Click the toolbar icon "Next Document" **or**

2. Click the menu "Navigation - Next Document" **or**

3. Enter this shortcut: Ctrl + Arrow right

Figure 8.19: Icon - Next Document

8.11 Previous Document

The documents are loaded and displayed one after the other in this application. You can switch between the documents. To skip to the next document, you have the following options:

1. Click the toolbar icon "Previous Document" **or**

2. Click the menu "Navigation - Previous Document" **or**

3. Enter this shortcut: Ctrl + Arrow left

Figure 8.20: Icon - Previous Document

8.12 Import Documents

TIFF and PDF files can be imported into the Inbox.

8.12.1 Import Documents (Drag & Drop)

Use this function to drag and drop TIFF or PDF files from the file system into the Inbox.

- Please note that in this case the separator function and the automatic template recognition do not work.

- Template recognition can, however, be performed manually after loading via the function "Search matching classification templates" in the toolbar.

To import via drag and drop, complete the following steps:

1. Select the documents you want to import from your file system.

2. Drag the selected documents via drag and drop into the user interface of the scan programme.
   a) The import process may take a while depending on the file size.

3. The documents are displayed as individual files in the scan programme and can be processed consecutively.

8.12.2 Import Documents (Menu)

Use this function to drag and drop TIFF or PDF files from the file system into the Inbox.

- Please note that in this case the separator function and the automatic template recognition do not work.

- Template recognition can, however, be performed manually after loading via the function "Search matching classification templates" in the toolbar.

To import, complete the following steps:

1. Select the "Import" function. To do this, you have the following options:
   a) Click "File - Import" in the menu or
   b) Enter this key command: CTRL+I

2. A dialogue opens.

    a) Select the TIFF or PDF file on your file system.

    b) Then confirm your selection with "Open".

    c) The document is now loaded into the client.

Figure 8.21: Icon - Import Documents

8.13 Split Documents

> There are several ways to split a document:
> - Splitting documents via barcode
> - Splitting documents via separator page
> - Splitting documents via Inbox function

With this function you can insert pages from a PDF or TIFF document separately or as a document.

1. Select the pages you want to split in the "Thumbnails". (Press and hold the "CTRL" key to select several documents).

2. Use the function "Split Document". To use the function, there are several options:

    a) Click the toolbar icon "Split Document" **or**

    b) Enter this shortcut: F7

3. The dialogue shows the modified current document and the new document.

4. Confirm the process with "OK" or cancel it with "Cancel".

5. The divided pages are inserted in the last position in the client.

6. In order to classify and archive a document, save the changes first.

    a) Click the save icon.

Figure 8.22: Icon - Split Document
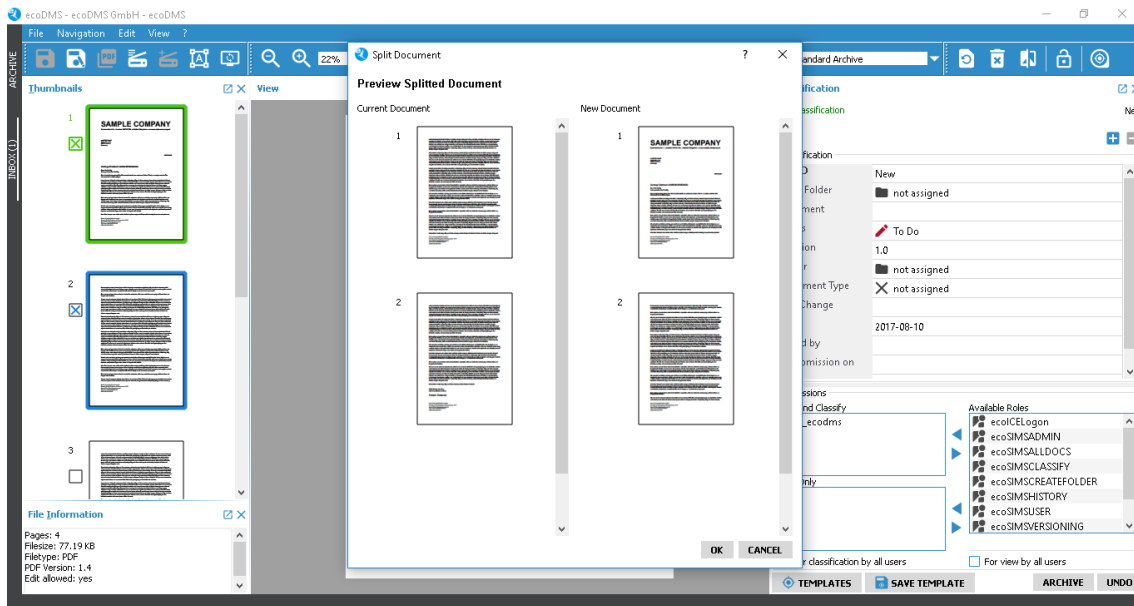
Figure 8.23: Inbox - Split Document

8.14 Unlock Documents

This function is exclusively available to ecoDMS administrators.

You can only edit and classify documents if the server connection is stable and the documents are not checked out by another user. Otherwise the documents are locked in the inbox. If required, the administrator can unlock the documents. If the document is checked out by another user, ecoDMS displays the name of this user above the document preview in the inbox. Documents should only be unlocked following prior consultation. To unlock a document, complete the following steps:

1. Select the document.

2. Click the "Unlock Document" icon on the toolbar.

Figure 8.24: Icon - Unlock Document
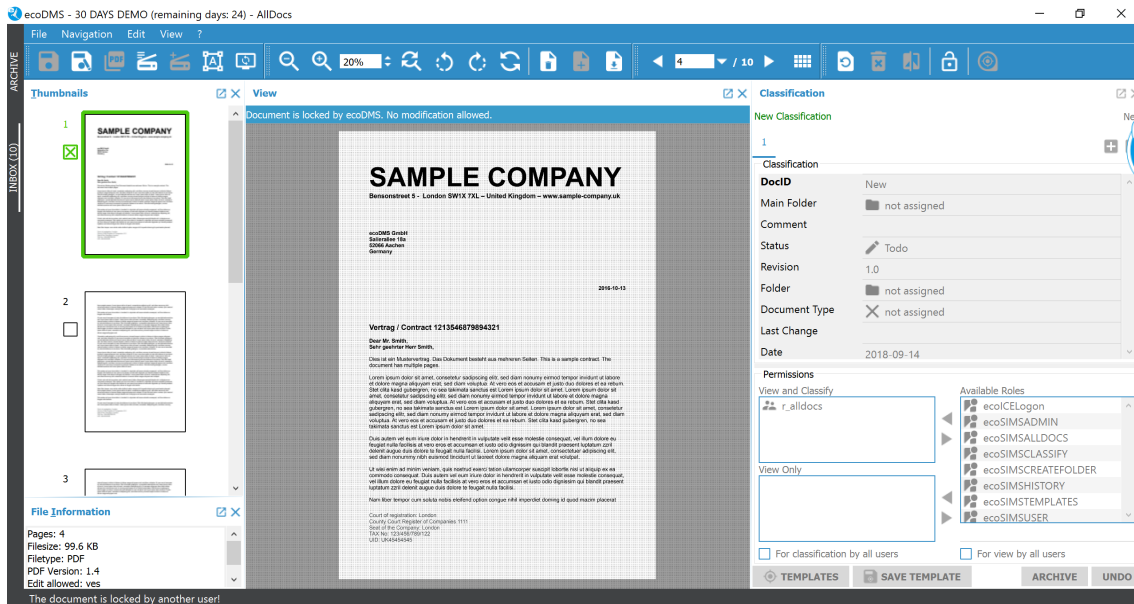
Figure 8.25: Document Locked By Another User (Inbox)

8.15 Edit Documents

You can use various functions to edit the documents requested via this application before they are archived.

8.15.1 Copy, Cut and Paste Pages

The Inbox provides several different editing functions. You can copy, cut and paste pages. Depending on the structure and type of a PDF file, the file can suppress these functions.

8.15.1.1 Cut

If a document includes multiple pages, selected pages can be cut and pasted in another position or document. To do so, complete the following steps:

1. Select the pages you want to cut in the "Thumbnails". (Press and hold the "CTRL" key to select several documents).

2. Use the function "Cut". To use the function, there are several options:

   a) Click the menu "Edit - Cut" **or**

   b) Right-click a selected page - "Cut" **or**

   c) Enter this shortcut: Ctrl + X

3. The selection is cut and copied to the clipboard.

4. In order to classify and archive a document, save the changes first.

   a) Click the Save icon.

Figure 8.26: Icon - Cut

8.15.1.2 Paste

Pages that are cut and copied are automatically copied to the clipboard and can be inserted anywhere in this application.

1. Select the pages you want to cut in the "Thumbnails". (Press and hold the "CTRL" key to select several documents).

2. Use the function "Paste". To use the function, there are several options:
   a) Click the menu "Edit - Paste" **or**
   b) Right-click a selected page - "Paste" **or**
   c) Enter this shortcut: Ctrl + V

3. The selection is pasted to the document.

4. In order to classify and archive a document, save the changes first.
   a) Click the save icon.

Figure 8.27: Icon - Paste

8.15.1.3 Copy

Pages that are copied are automatically copied to the clipboard and can be inserted anywhere in this application.

1. Select the pages you want to copy in the "Thumbnails". (Press and hold the "CTRL" key to select several documents).

2. Use the function "Copy". To use the function, there are several options:
   a) Click the menu "Edit - Copy" **or**
   b) Right-click a selected page - "Copy" **or**
   c) Enter this shortcut: Ctrl + C

3. The selection is copied to the clipboard.

4. In order to classify and archive a document, save the changes first.
   a) Click the save icon.

Figure 8.28: Icon - Copy

8.15.2 Rotate Pages

If necessary, you can rotate the pages of a document.

8.15.2.1 Rotate Left

Use this tool to rotate selected page(s) 90 degrees to the left.

1. Select the pages you want to rotate in the "Thumbnails". (Press and hold the "CTRL" key to select several documents).

2. Use the function "Rotate Left". To use the function, there are several options:
   a) Click the menu "View - Rotate Left" **or**
   b) Right-click a selected page - "Rotate Left" **or**
   c) Click the toolbar icon "Rotate Left" **or**

d) Enter this shortcut: Ctrl + Shift + L

3. In order to classify and archive a document, save the changes first.

   a) Click the save icon.

Figure 8.29: Icon - Rotate Left

8.15.2.2 Rotate Right

Use this tool to rotate selected page(s) 90 degrees to the right.

1. Select the pages you want to rotate in the "Thumbnails". (Press and hold the "CTRL" key to select several documents).

2. Use the function "Rotate Right". To use the function, there are several options:

   a) Click the menu "View - Rotate Right" **or**

   b) Right-click a selected page - "Rotate Right" **or**

   c) Click the toolbar icon "Rotate Right" **or**

   d) Enter this shortcut: Ctrl + Shift + R

3. In order to classify and archive a document, save the changes first.

   a) Click the save icon.

Figure 8.30: Icon - Rotate Right

8.15.2.3 Rotate 180 Degrees

Use this tool to rotate selected page(s) by 180 degrees.

1. Select the pages you want to rotate in the "Thumbnails". (Press and hold the "CTRL" key to select several documents).

2. Use the function "Rotate 180 degrees". To use the function, there are several options:

   a) Click the menu "View - Rotate 180 degrees" **or**

   b) Right-click a selected page - "Rotate 180 degrees" **or**

   c) Click the toolbar icon "Rotate 180 degrees" **or**

   d) Enter this shortcut: Ctrl + R

3. In order to classify and archive a document, save the changes first.

   a) Click the save icon.

Figure 8.31: Icon - Rotate 180 degrees

8.15.3 Export Pages

You can export selected pages of a TIFF document and save them in a file.

1. Select the pages you want to export in the "Thumbnails". (Press and hold the "CTRL" key to select several documents).

2. Use the function "Export Selected Page(s)". To use the function, there are several options:
   a) Click the menu "Edit - Export Selected Page(s)" **or**
   b) Right-click a selected page - "Export Selected Page(s)" **or**
   c) Click the toolbar icon "Export Selected Page(s)" **or**
   d) Enter this shortcut: Ctrl + E

3. Select the path and enter a file name.

4. Confirm your entry with "Save" or cancel the process with "Cancel".

Figure 8.32: Icon - Export Selected Page(s)

8.15.4 Add Pages

You can add more pages to existing TIFF files [6].

1. Select the document.

2. Use the function "Add Page(s)". To use the function, there are several options:
   a) Click the menu "Edit - Add Page(s)" **or**
   b) Right-click a selected page - "Add Page(s)" **or**
   c) Click the toolbar icon "Add Page(s)" **or**
   d) Enter this shortcut: Ins

3. Select the path and choose the file.

4. Confirm your selection with "Open" or cancel the process with "Cancel".

5. In order to classify and archive a document, save the changes first.
   a) Click the save icon.

Figure 8.33: Icon - Add Selected Page(s)

8.15.5 Delete Pages

You can delete selected pages.

1. Select the pages you want to delete in the "Thumbnails". (Press and hold the "CTRL" key to select several documents).

2. Use the function "Delete Selected Page(s)". To use the function, there are several options:
   a) Click the menu "Edit - Delete Selected Page(s)" **or**
   b) Right-click a selected page - "Delete Selected Page(s)" **or**
   c) Click the toolbar icon "Delete Selected Page(s)" **or**

      d) Enter this shortcut: Del

3. Confirm the message with "Yes" or cancel the process with "No".

4. In order to classify and archive a document, save the changes first.
      a) Click the save icon.

Figure 8.34: Icon - Delete Selected Page(s)

8.15.6 Move Pages

You can change the order of pages within a document. To move page(s), complete the following steps:

1. Select the pages you want to move in the "Thumbnails". (Press and hold the "CTRL" key to select several documents).

2. Move the page(s) by dragging them to the new position.

3. In order to classify and archive a document, save the changes first.
      a) Click the save icon.

8.15.7 Swap Pages

You can change the order of pages within a document. To swap the position of page(s), complete the following steps:

1. Select the pages you want to swap in the "Thumbnails". (Press and hold the "CTRL" key to select several documents).

2. Move the page onto another page.

3. When the two pages touch, two arrows appear which signal and execute the swap.

4. In order to classify and archive a document, save the changes first.
      a) Click the save icon.

8.15.8 Zoom Pages / View

The software includes various zoom functions for page display.

8.15.8.1 Zoom Out

The software includes various zoom functions for page display. To zoom out, complete the following steps:

1. Select the page which you want to view in the "Thumbnails".

2. Use the function "Zoom Out". To use the function, there are several options:
      a) Click the menu "View - Zoom Out" **or**
      b) Click the toolbar icon "Zoom Out" **or**
      c) Enter a percentage value for the view in the spinbox **or**
      d) Click the bottom arrow in spinbox **or**
      e) Enter this shortcut: Alt + -

Figure 8.35: Icon - Zoom Out

8.15.8.2 Zoom In

The software includes various zoom functions for page display. To zoom in, complete the following steps:

1. Select the page which you want to view in the "Thumbnails".

2. Use the function "Zoom In". To use the function, there are several options:

   a) Click the menu "View - Zoom In" **or**

   b) Click the toolbar icon "Zoom In" **or**

   c) Enter a percentage value for the view in the spinbox **or**

   d) Click the top arrow in spinbox **or**

   e) Press the right mouse button and select the area which you want to zoom in in the "view" window **or**

   f) Enter this shortcut: Alt + +

Figure 8.36: Icon - Zoom In

8.15.8.3 Fit

The software includes various zoom functions for the display of pages. To fit in, complete the following steps:

1. Select the page which you want to view in the "Thumbnails".

2. Use the function "Fit". To use the function, there are several options:

   a) Click the menu "View - Fit" **or**

   b) Click the toolbar icon "Fit" **or**

   c) Double click on the page in the "View" window **or**

   d) Enter this shortcut: Alt + Z

Figure 8.37: Icon - Fit

8.15.9 Select Pages

You have various options to select or mark the pages of a document.

8.15.9.1 Select All Pages

This function selects all pages of the displayed document simultaneously.

1. Click into the "View".

2. Use the function "Select All Pages". To use the function, there are several options:

   a) Click the menu "Edit - Select All Pages" **or**

   b) Right click on a page - "Select All Pages" **or**

   c) Enter this shortcut: Ctrl + Alt + A

8.15.9.2 Select Even Pages

With this function you can select all pages with even numbers in a document.

1. Click into the "View".

2. Use the function "Select All Pages". To use the function, there are several options:

    a) Click the menu "Edit - Select Even Pages" **or**

    b) Right click on a page - "Select Even Pages" **or**

    c) Enter this shortcut: Ctrl + Alt + G

8.15.9.3 Select Odd Pages

With this function you can select all pages with odd numbers in a document.

1. Click into the "View".

2. Use the function "Select Odd Pages". To use the function, there are several options:

    a) Click the menu "Edit - Select Odd Pages" **or**

    b) Right click on a page - "Select Odd Pages" **or**

    c) Enter this shortcut: Ctrl + Alt + U

8.15.9.4 Undo Selection

This function can undo the selection of pages in a document.

1. Click into the "View".

2. Use the function "Undo Selection". To use the function, there are several options:

    a) Click the menu "Edit - Undo Selection" **or**

    b) Right click on a page - "Undo Selections" **or**

    c) Enter this shortcut: Ctrl + Shift + A

8.15.9.5 Reverse Selection

All pages are marked, except the one(s) you have already selected.

1. Click into the "View".

2. Use the function "Reverse Selection". To use the function, there are several options:

    a) Click the menu "Edit - Reverse Selection" **or**

    b) Right click on a page - "Reverse Selections" **or**

    c) Enter this shortcut: Ctrl + Shift + U

8.15.9.6 Next Page

With this function the next page of the current document is displayed in the "View" window.

1. Click into the "View".

2. Use the function "Next Page". To use the function, there are several options:

    a) Click the menu "Navigation - Next Page" **or**

    b) Right click on a page - "Next Page" **or**

    c) Enter this shortcut: Ctrl + Shift + Arrow down

8.15.9.7 Previous Page

With this function the previous page of the current document is displayed in the "View" window.

1. Click into the "View".

2. Use the function "Next Page". To use the function, there are several options:
   a) Click the menu "Navigation - Next Page" **or**
   b) Right click on a page - "Next Page" **or**
   c) Enter this shortcut: Ctrl + Shift + Arrow down

8.16 Close Documents

You can close documents.

- Closed documents are not removed from the server.

- Every time the programme launches, all available, scanned documents are automatically retrieved.

- With a click on the icon "Request Documents" all available, scanned documents are automatically reloaded.

You have various options for closing a document.

1. Use the function "Close". To use the function, there are several options:
   a) Click the menu "File - Close" **or**
   b) Enter this shortcut: Ctrl + Alt + C

8.16.1 Close All Documents

If you do not want to exit the application but want to close all opened documents, you have the following options:

- Closed documents are not removed from the server.

- Every time the programme launches, all available, scanned documents are automatically retrieved.

- With a click on the icon "Request Documents" all available, scanned documents are automatically reloaded.

1. Use the function "Close". To use the function, there are several options:
   a) Click the menu "File - Close All" **or**
   b) Enter this shortcut: Ctrl + Shift + C

8.17 Delete Documents

When the documents are displayed in this scan programme, they have not yet been stored in ecoDMS. Therefore, documents that are not required can be deleted again after scanning. You cannot undo this operation.

8.17.1 Delete Document (Overview)

For more information, please refer to the section "Display Overview of All Scans".

8.17.2 Delete Document (User)

Documents that should not be archived can be removed from the server. To do so, complete the following steps:

1. Select the document.
   a) Click the icon "Delete Document from Server" on the toolbar or

b) Press "F8" on your keyboard.

2. The system will ask you to confirm the delete process.

   a) The document is deleted irrevocably if you confirm the process with "Yes".

   b) Click "No" to abort the process.

Figure 8.38: Icon - Delete Document from Server

8.17.3 Delete All Documents (Admin)

> For security reasons, this function is only available to users who have been assigned the system roles "ecoSIMSAdmin", "ecoSIM-SCLASSIFY" and "ecoSIMSALLDOCS". Otherwise the function is not visible.

To remove all documents from the scan programme, you require special system permissions in addition to the standard permissions. To delete all documents, complete the following steps:

1. Select "Edit -> Delete All Documents..." from the menu.

2. The system will ask you to confirm the delete process.

   a) All available documents in the scan programme are deleted irrevocably if you confirm the process with "Yes".

   b) Click "No" to abort the process.

8.18 Storage Functions

There are various functions for saving documents and/or changes. By default, this part of the application is provided for archiving of scanned documents. In addition to the archiving function, the software also includes other functions to save documents. These can be used in parts independently of the archive function.

8.18.1 Save Changes

The Classification dialogue is enabled if you make changes to a scanned document (for example: Rotate Pages, Delete Pages...). To unlock the document for Classification, the changes must be saved first. Complete the following steps:

1. Make the required modifications to the document.

2. Use the function "Save". To use the function, there are several options:

   a) Click the menu "File - Save" **or**

   b) Click the toolbar icon "Save" **or**

   c) Enter this shortcut: Ctrl + S

Figure 8.39: Icon - Save

8.18.2 Save as PDF

> This feature requires a licence of the ecoDMS full version but can be tested during the demo time. In the Free4Three version this function is not enabled.

The scanned documents can be saved as a PDF file locally, on a data carrier or in the file system.

1. Select the document.

2. Use the function "Save as PDF". To use the function, there are several options:
   a) Click the menu "File - Save as PDF" **or**
   b) Click the toolbar icon "Save as PDF"

3. Use the file name and the destination to specify the PDF in the dialogue that opens.

4. You can also save the file as a searchable PDF.
   a) To do so, enable the command "Save as searchable PDF".
      i. This function is only included in the ecoDMS full version.

5. Click "Save" to save the PDF or "Cancel" to cancel the process.

Figure 8.40: Icon - Save as PDF

8.18.3 Save As

The scanned documents can be saved on a data carrier or in the file system.

1. Select the document.

2. Use the function "Save as". To use the function, there are several options:
   a) Click the menu "File - Save as" **or**
   b) Click the toolbar icon "Save as"

3. Use the file name and the destination to specify the file in the dialogue that opens.

4. Click "Save" to save the file or "Cancel" to cancel the process.

Figure 8.41: Icon - Save as PDF

Important Information for Chapter 8

[1] *Bitte beachten Sie, dass diese Einstellungen auf den jeweiligen Arbeitsplatz bezogen sind und nicht im Benutzerprofil gespeichert werden.*

[2] *Der Scaninput-Ordner wird als Scanmethode empfohlen, da nur hierbei alle serverseitigen Prozesse (inkl. automatischer Vorlagenerkennung) durchgeführt werden können.*

[3]   *Die TWAIN/WIA/SANE-Schnittstelle ist mit vielen, aber nicht mit allen Scannermodellen kompatibel. Beim Scannen über die TWAIN/WIA/SANE Schnittstelle ist die Vorlagenerkennung nur manuell über die Funktion "Passende Klassifizierungsvorlagen suchen" möglich. Über diese Schnittstelle können nur TIFF Dateien eingescannt werden.*

[4]   *Diese Funktion setzt eine Lizenz der ecoDMS-Vollversion voraus (Funktion ist nicht in der ecoDMS Demoversion und Free4Three Edition enthalten).*

[5]   *Diese Funktion setzt zur Ansicht und Nutzung bestimmte System-Berechtigungen voraus.*

[6]   *Für PDF-Dateien steht die Funktion "Seiten hinzufügen" nicht zur Verfügung.*

9 Classification

Via Classification you can assign, for example, the virtual destination folder in ecoDMS, the document type, the status, the responsibilities and many more archiving details to each file you archive. These details allow documents to be systematically filed and easily retrieved through keyword search as an alternative and/or in addition to the full-text search. The following chapter describes various methods and options for document classification.

> – Viewing and using this function requires specific system permissions.
> – A document may only be classified and versioned if the user has a permission to classify the specified document.
> – Administrators can define the appropriate classification attributes and mandatory fields for each document type via the settings dialogue. The display and order of the attributes therefore depends on the settings.
> – You can install server and client in different languages. The view of the classification attributes and messages depends on the language you have selected for the ecoDMS server component.
> – The preview in the classification dialogue is only displayed for PDFs and files that are archived via the ecoDMS Plugins or the PDF/A printer.

9.1 Classification dialogue

You have several methods and options to classify documents. The Classification dialogue is very important. This includes all stored Classification Information. For almost any archiving the Classification Dialog Box is relevant.
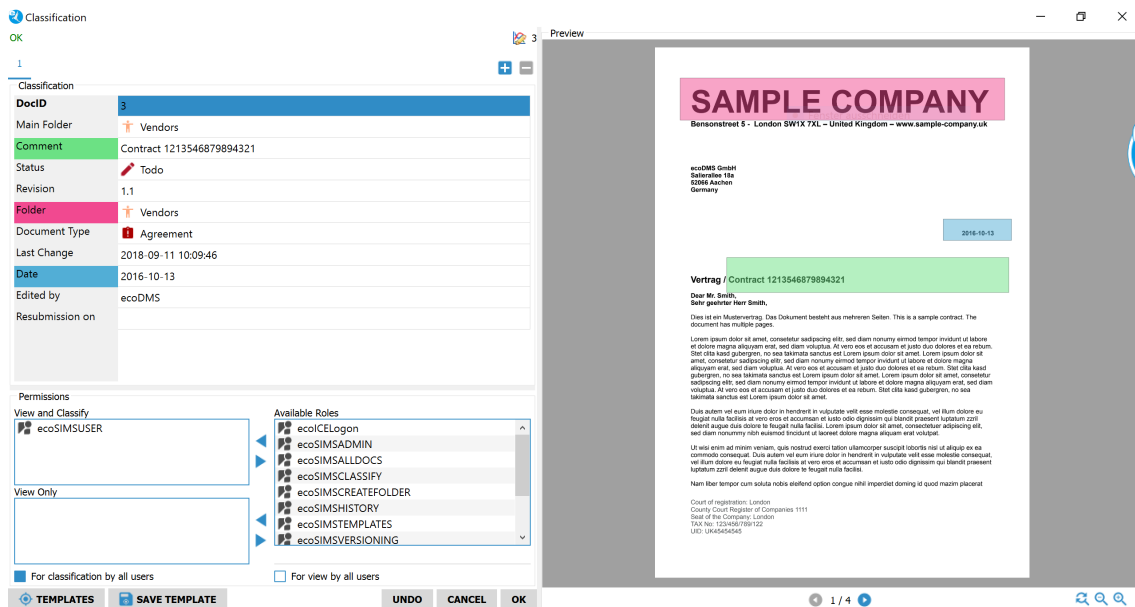
Figure 9.1: Classification dialogue with Preview

9.1.1 Open Classification dialogue

To open the Classification dialogue ecoDMS Client, complete the following steps [3, 4]:

1. Select documents in the ecoDMS table.

2. Select now the "Classify" function. You have following options:

    a) Right-click one of the selected documents - Classify **or**

    b) Click the "Classify" icon in toolbar **or**

    c) Enter this shortcut: CTRL + K

Figure 9.2: Icon - Classify

9.1.2 Change order of Attributes

Administrators can define the appropriate classification attributes and mandatory fields for each document type via the settings dialogue. The display and order of the attributes therefore depends on the settings. Please refer to the section "Settings -> Document Types & Retention Periods" for more details.

9.1.3 Show/Hide Attributes

Administrators can define the appropriate classification attributes and mandatory fields for each document type via the settings dialogue. The display and order of the attributes therefore depends on the settings. Please refer to the section "Settings -> Document Types & Retention Periods" for more details.

9.1.4 Undo

The "Undo" button reverts all previously made classification settings and returns the classification of the selected document to its last saved state. If, for example, ecoDMS recognises a "classification template", you can reset the automatic Classification by clicking the Undo button for the specific document.

9.1.5 OK

To save the classification, click "OK"

9.1.6 Save and Continue

If you have opened several documents for classification, click the "Save and Continue" button to save the change(s) made to the document and to edit the next one.

9.1.7 Skip Between Documents

If you have selected several documents for simple classification, you can use the keys (in the upper area of the classification window) to skip between documents.

9.1.8 Cancel - Message

If you have not saved your changes to the classification, a message displays. Click "Yes" to save and "No" to discard the changes.

9.2 Classify

There are various classification attributes available for the Classification (assignment / assignment of meta data) of archived documents. A distinction is made between "standard attributes" that are integrated in the system and "user-defined attributes". The following chapters explain the "Standard Attributes".

9.2.1 DocID

DocID stands for "Document Identification Number". A sequential document identification number is automatically allocated to each archived document. The user cannot edit or enter the DocID manually.

9.2.2 Main Folder

The main folders are determined by the folder structure and are allocated automatically. The user cannot create the main folder manually.

- If you have not yet selected a folder, the entry "Not assigned" is displayed. As soon as you have selected a folder from the folder structure, the system automatically recognises and enters the associated main folder.
- For more information on this topic, please refer to the chapter on "Settings - Folder Structure".

9.2.3 Folder

- Tip: If the folder window is open, you can jump directly to the required folder by entering the first letters or numbers of the folder name (also see Folder Search).
- Information: A user can only see the folders, documents and classifications for which the user has a permission.

Folders are determined by the folder structure and can either be selected manually or automatically via classification templates and/or via the "folder recognition". The folder determines the virtual file destination in ecoDMS. If you have not yet selected a folder, the entry "Not assigned" is displayed. You can also create folders directly through the Classification dialogue or the folder structure if you have the according permission. In the following you will learn how to select a folder.

9.2.3.1 Classification dialogue

1. Open the Classification dialogue for the document(s).

2. Select the entry field for the "Folder" attribute.

3. Open the Folder Structure:

    a) Either by double-clicking the entry field **or**

    b) By entering the letter "e" (edit).

4. Select the folder

    a) by double-clicking it in the Folder Structure **or**

    b) by entering the folder name, the key, or deposited keywords into the Folder Structure.

        i. In this case an input window opens.

        ii. ecoDMS selects the folder you searched for. Use the "F3" key to continue the search.

        iii. Confirm your entry selection with the "Enter" key.
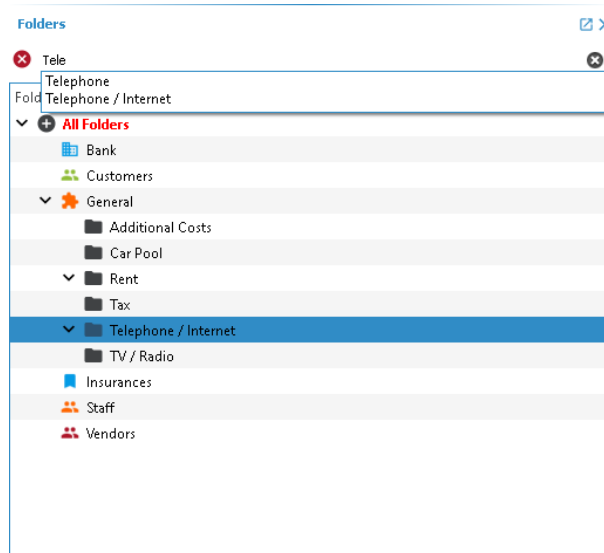
Figure 9.3: Searching for Folders

9.2.3.1.1 Copy & Paste Text

> – The preview in the classification dialogue is only displayed for PDFs and files that are archived via the e
> the PDF/A printer.

If a document preview is displayed in the Classification dialogue, you can select the preview contents and use it for classification. In the Inbox this information can be copied from the "View" window. To do so, complete the following steps:

1. In the Classification dialogue, select the entry field for the "Folder" attribute.

2. Press the "Ctrl" key and Right-click the area where you want to paste the content, in the "preview".

3. If you enter the "Folder" attribute, the Folder Structure opens. The copied content is recorded as a search term for the folder.

4. Select the folder and confirm your selection with "Enter".

9.2.3.2 Table View (ecoDMS)

1. Select the document in the ecoDMS table.

2. Select the "Folder" attribute.

3. Open the Folder Structure:
   a) Either by double-clicking the entry field **or**
   b) By entering the letter "e" (edit).

4. Select the folder
   a) by double-clicking it in the Folder Structure or
   b) by entering the folder name, the key, or deposited keywords into the Folder Structure.
      i. In this case an input window opens.
      ii. ecoDMS selects the folder you searched for. Use the "F3" key to continue the search.
      iii. Confirm your entry and selection with the "Enter" key.
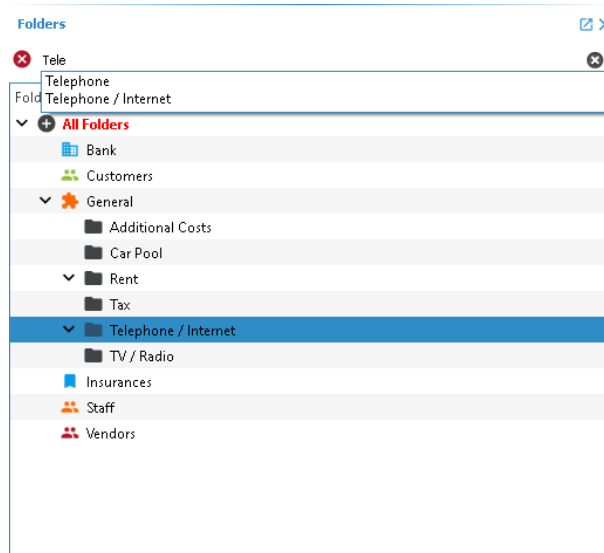
Figure 9.4: Searching for Folders

9.2.3.3 Drag & Drop Classification in ecoDMS

1. Press and hold the CTRL key to select several documents at once

2. Select the documents in ecoDMS

3. Grab your selection in the area of a DocID

4. Now drag it onto a folder in the folder tree

9.2.4 Comment

The "Comment" box is a free text box which can be filled with any content. You can either enter the comment manually or ecoDMS can automatically enter the comment via the classification templates, which can be recognised from the file name. In the following you will learn how to enter the attribute [3, 4, 1]:

9.2.4.1 Classification dialogue

1. Open the Classification dialogue for the document(s).

2. Select the entry field for the "Comment" attribute.
    a) Either by double-clicking **or**
    b) By entering the letter "e" (edit).

3. Enter the comment.

9.2.4.1.1 Copy & Paste Text

> – The preview in the classification dialogue is only displayed for PDFs and files that are archived via the e the PDF/A printer.

If a document preview is displayed in the Classification dialogue, you can select the preview contents and use it for classification. In the Inbox this information can be copied from the "View" window. To do so, complete the following steps:

1. In the Classification dialogue, select the entry field for the "Comment" attribute.

2. The following options are available for copying content:

a) Overwrite existing text in the attribute of a free text field (for example, comment):
Press the "Ctrl" key and Right-click an area to select it in the scanned document.

b) Add texts to an existing text in the attribute of a free text field (for example, comment):
Press the "Ctrl" key and the "Shift" key and Right-click an area to select it in the scanned document.

9.2.4.2 Table View (ecoDMS)

1. Select the document in the ecoDMS table.

2. Select the entry field for the "Comment" attribute.

   a) Either by double-clicking or

   b) By entering the letter "e" (edit).

3. Enter the comment.

9.2.5 Status

A status provides information about the processing status of a document. As a default, 3 statuses are deposited in ecoDMS:

1. Done

2. Resubmission (please read the chapter "Resubmissions")

3. ToDo

These can be renamed or enhanced by the administrator, but not deleted. You can either assign a status manually or ecoDMS recognises it automatically through the classification templates. In the following you will learn how to manually select the Status:

9.2.5.1 Classification dialogue

1. Open the Classification dialogue for the document(s).

2. Select the entry field for the Status attribute.

   a) Either by double-clicking **or**

   b) By entering the letter "e" (edit).

3. Select the Status.

   a) If you select Resubmission, the calendar opens to enter the resubmission date.

   b) Select the date in the calendar.

       i. Use the arrow keys (left, right) to switch between the months.

       ii. You can change the month and the year using the navigation in the calendar header.

       iii. Click "Today" to set the current day.

       iv. You can also enter the date directly. The first number is entered in the calendar.

   c) Confirm your entry and selection with "OK".
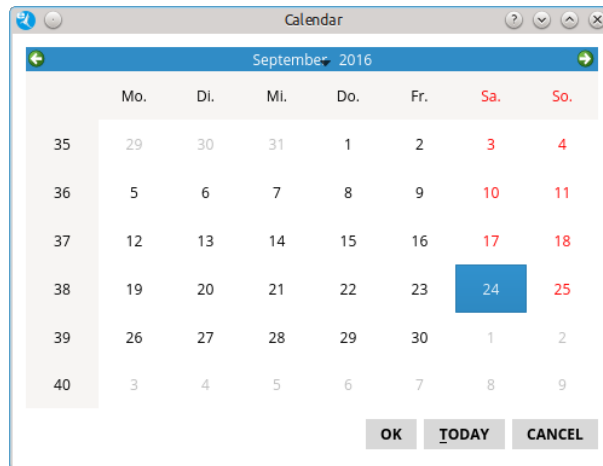
Figure 9.5: Calendar - Select Date

9.2.5.2 Table View (ecoDMS)

1. Select the document in the ecoDMS table.

2. Select the entry field for the Status attribute.
   a) Either by double-clicking **or**
   b) By entering the letter "e" (edit).

3. Select the Status.
   a) If you select Resubmission, the calendar opens to enter the resubmission date.
   b) Select the date in the calendar.
      i. Use the arrow keys (left, right) to switch between the months.
      ii. You can change the month and the year using the navigation in the calendar header.
      iii. Click "Today" to set the current day.
      iv. You can also enter the date directly. The first number is entered in the calendar.

4. Confirm your entry and selection with "OK".

Figure 9.6: Calendar - Select Date

9.2.5.3 Drag & Drop Classification in ecoDMS

1. Press and hold the CTRL key to select several documents at once.

2. Select the documents in ecoDMS.

3. Grab your selection in the area of a DocID.

4. Now drag it onto a status.

5. If you select Resubmission, the calendar opens to enter the resubmission date.

    a) Select the date in the calendar.

        i. Use the arrow keys (left, right) to switch between the months.

        ii. You can change the month and the year using the navigation in the calendar header.

        iii. Click "Today" to set the current day.

        iv. You can also enter the date directly. The first number is entered in the calendar.

6. Confirm your entry and selection with "OK".
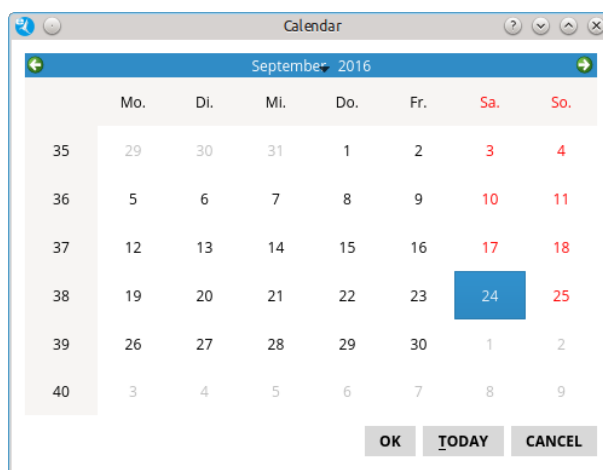
Figure 9.7: Calendar - Select Date

9.2.6 Revision

The revision is automatically assigned by the system. The revision increments by one with each change to the classification of a document. At the same time an entry is made in the document history. The revision number shows how often a file was changed within the classification after archiving. The user cannot change the DocID. The revision only refers to changes within the Classification. ecoDMS records any change to the classification attributes of a document in a history. All processing and archiving steps are thus automatically logged and can be reproduced at any time [3, 1].

9.2.7 Document Type

When assigning documents, the type of document (e.g. incoming invoices, outgoing invoices, agreement, offer is specified in Document Type. We recommend you select the Document Type when classifying each document you archive. This makes the handling and the retrieval of documents much easier. You can either assign a status manually or ecoDMS recognises it automatically through the "classification templates". If you have not yet selected a Document Type, the entry "Not assigned" is displayed. In the following you will learn how to manually select the Document Type [3, 1]:

9.2.7.1 Classification dialogue

1. Open the Classification dialogue for the document(s).

2. Select the entry field for the Document Type attribute.

    a) Either by double-clicking **or**

    b) By entering the letter "e" (edit).

3. Select the Document Type.

9.2.7.2 Table View (ecoDMS)

1. Select the document in the ecoDMS table.

2. Select the entry field for the Document Type attribute.

    a) Either by double-clicking **or**

    b) By entering the letter "e" (edit).

3. Select the Document Type.

9.2.8 Last Change

If a change is made to the classification after the archiving process, the date and time of the last change to the document is displayed here. The classification attribute is automatically allocated and cannot be entered manually by the user [3, 1].

9.2.9 Date

The date is automatically assigned when archiving, but it can be changed if necessary. We recommend you store the actual postal date of receipt of the document as date in ecoDMS. When searching for documents, the actual date can be included in the search. You can either assign a status manually or ecoDMS recognises it automatically. In the following you will learn how to manually select the "date" [3, 1]:

9.2.9.1 Classification dialogue

1. Open the Classification dialogue for the document(s).

2. Select the entry field for the "Date" attribute.

    a) Either by double-clicking **or**

    b) By entering the letter "e" (edit).

3. The calendar dialogue opens. Select the date in the calendar.

    a) Use the arrow keys (left, right) to switch between the months.

    b) You can change the month and the year using the navigation in the calendar header.

    c) Click "Today" to set the current day.

    d) You can also enter the date directly. The first number is entered in the calendar.

4. Confirm your entry and selection with "OK".
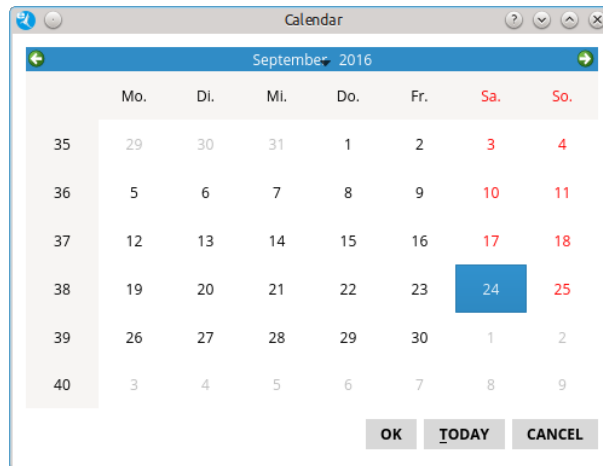
Figure 9.8: Calendar - Select Date

9.2.9.1.1 Copy & Paste Text

— The preview in the classification dialogue is only displayed for PDFs and files that are archived via the e
the PDF/A printer.

If a document preview is displayed in the Classification dialogue, you can select the preview contents and use it for classification. In the Inbox this information can be copied from the "View" window. To do so, complete the following steps:

1. In the Classification dialogue, select the entry field for the "Date" attribute.

2. Press the "Ctrl" key and Right-click the area where you want to paste the content, in the "preview".

ecoDMS recognises the following date formats:

1. yyyy.MM.dd

2. dd.MM.yyyy

3. dd.MM.yy

4. dd. MMM yyyy

5. dd. MMMM yyyy

6. dd MM yyyy

7. dd MMMM yyyy

8. dd.MMyyyy

9. ddMMyyyy

10. ddMM.yyyy

9.2.9.2 Table View (ecoDMS)

1. Select the document in the ecoDMS table.

2. Select the entry field for the "Date" attribute.
   a) Either by double-clicking **or**
   b) By entering the letter "e" (edit).

3. The calendar dialogue opens. Select the date in the calendar.
   a) Use the arrow keys (left, right) to switch between the months.

b) You can change the month and the year using the navigation in the calendar header.

c) Click "Today" to set the current day.

d) You can also enter the date directly. The first number is entered in the calendar.

4. Confirm your entry and selection with "OK".

9.3 Permissions

To ensure that the documents can only be viewed and edited by authorised persons, you can assign individual permissions to each document and each folder in ecoDMS. This ensures confidentiality of the documents. You can assign permissions in the Classification dialogue.
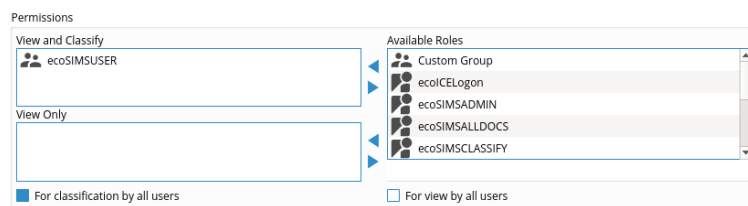
Figure 9.9: Classification dialogue - Permissions

9.3.1 Assign Permissions

You assign permissions via drag & drop. The window on the right displays all available users. These can be dragged to the two boxes on the left. This specifies who may view a document and who may also classify the document.

– Please note that at least one user must be entered in the "View and Classify" box.

9.3.1.1 View and Classify

This window contains all "roles" (users, groups) that are allowed to view and classify the document after the Classification is saved. Please note that at least one user or role (group) must be assigned in this permission window. To assign "roles" to this window, complete the following steps [3, 4, 2]:

1. Select the "roles" (users, groups) in the "Available Roles" window.

a) If you hold the "Ctrl" key, you can select several roles simultaneously.

2. Drag and drop the "roles" into the "View and Classify" window.

a) Alternatively, you can assign the "roles" to the window with the upper arrow icon (arrow right).

9.3.1.2 View Only

This window contains all "roles" (users, groups) that are only allowed to view but not classify the document after the Classification is saved. To assign "roles" to this window, complete the following steps [3, 4, 2]:

1. Select the "roles" (users, groups) in the "Available Roles" window.

a) If you hold the "Ctrl" key, you can select several roles simultaneously.

2. Drag and drop the "roles" into the "View Only" window.

a) Alternatively, you can assign the "roles" to the window with the lower arrow icon (arrow left).

9.3.1.3 For Classification by All Users

If the "For Classification by All Users" function is enabled, the document can be viewed and classified by all users after the classification has been saved. Exception: The associated folder limits access with more permissions [3, 4, 2].

– The "ecoSIMSUSER" role is entered by the system in the "View and Classify" window when the command is enabled.

9.3.1.4 For View by All Users

If you enable the "For View by All Users" function, all users can view the document after you save the classification. Exception: The associated folder limits access with more permissions.

– The "ecoSIMSUSER" role is entered by the system in the "View Only" window when the command is enabled.

9.3.2 Remove Permissions

To remove permissions, complete the following steps:

9.3.2.1 View and Classify

This window contains all "roles" (users, groups) that are allowed to view and classify the document after the Classification is saved. Please note that at least one user or role (group) must be assigned in this permission window. To remove a profile from the "Roles" window, complete the following steps [3, 4, 2]:

1. Select the "roles" (users, groups) in the "View and Classify" window.

   a) If you hold the "Ctrl" key, you can select several roles simultaneously.

2. Drag and drop the "roles" into the "Available Roles" window.

   a) Alternatively, you can assign the "roles" to the window with the upper arrow icon (arrow right).

9.3.2.2 View Only

This window contains all "roles" (users, groups) that are only allowed to view but not classify the document after the Classification is saved. To remove "roles" from this window, complete the following steps [3, 4, 2]:

1. Select the "roles" (users, groups) in the "View Only" window.

   a) If you hold the "Ctrl" key, you can select several roles simultaneously.

2. Drag and drop the "roles" into the "Available Roles" window.

   a) Alternatively, you can assign the "roles" to the window with the lower arrow icon (arrow right).

9.3.2.3 For Classify by All Users

If the "For Classify by All Users" command is disabled, the document cannot be viewed and classified by all users after the Classification is saved (please note the folder permission) [3, 4].

– The "ecoSIMSUSER" role is removed from the system in the "View and Classify" window when the command is disabled.

9.3.2.4 For View by All Users

If the "For View by All Users" command is disabled, the document cannot be viewed by all users after the Classification is saved (please note the folder permission) [3, 4].

– The "ecoSIMSUSER" role is removed from the system in the "View Only" window when the command is disabled.

9.4 Preview

– For mass classification, there is no preview window in the Classification dialogue.
– This feature requires a licence of the ecoDMS full version but can be tested during the demo time. In the Free4Three version this function is not enabled.

When archiving via the Office Plugins or the PDF/A Printer and when generally saving PDF files, a preview is also displayed inside the Classification dialogue. From this preview window, you can use text passages and date fields for the classification.

9.5 Mass Classification

When mass classifying, you can classify several documents simultaneously with the same information. There are several ways to open this function. When using the mass classify function, only fill in the boxes which you want to apply to all the documents you want to classify. All other classification attributes are not overwritten.

9.5.1 Open Mass Classification

To open / start the mass classification, complete the following steps [3, 4]:

1. Select several documents in ecoDMS table.

2. Now select the function mass classification. You have followings options:

   a) Right-click one of the selected documents - Mass Classification **or**

   b) Click the icon mass classification in toolbar **or**

   c) Enter this shortcut: Ctrl + Shift + K

Alternatively, the mass classification can be selected as classification method when you archive multiple documents at the same time and you want to classify them in the same way.

Figure 9.10: Icon - Mass Classification
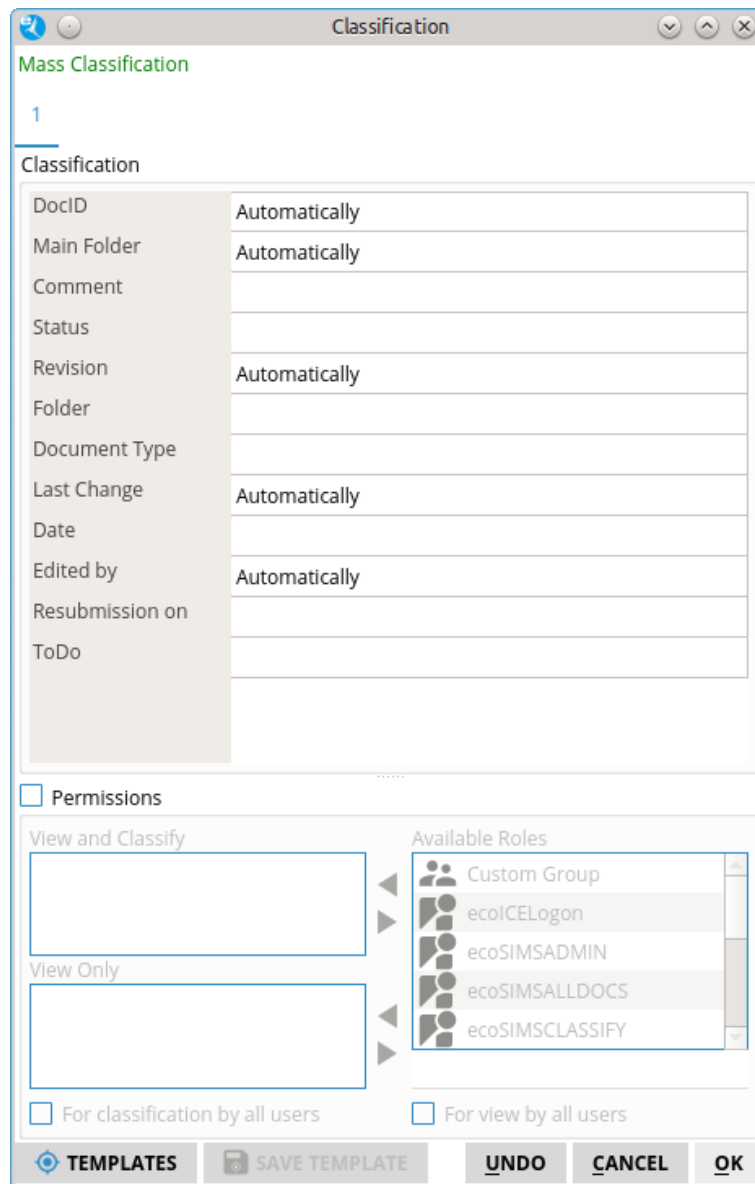
Figure 9.11: Mass Classification

9.5.2 Permissions in Mass Classification

Through mass classification you can align the permissions of the selected documents. This is an optional process. The permissions can also be omitted during mass classification. However, the user will always require a permission to classify the selected documents [3, 4, 2].

1. Start Mass Classification.

2. Activate the "Permission" by selecting the box.

3. Assign permissions as usual.

9.6 Multiple Classification

Multiple classification allows a document to be classified several times (internal linking) without repeatedly saving it to the archive. This allows you to deposit different classifications for one document. The document is saved once in the database, but it can be assigned any number of classifications in the user interface. For example, you can assign a file to various folders in ecoDMS. The DocID for the document is then referenced several times in ecoDMS due to the different links[3, 4].

- To assign additional classifications to a document, you must first create the document on separate tabs. You can edit and remove the tabs, if required, as long as you did not confirm the classification with "Save" or "OK".
- You can only edit and delete individual tabs until ecoDMS has saved and completed the classification.
- Editing a classification is still possible after saving. To do this, you require a permission for this classification entry.
- To delete such an entry, carry out the standard ecoDMS deletion process (delete function).

Figure 9.12: Icon - Classification
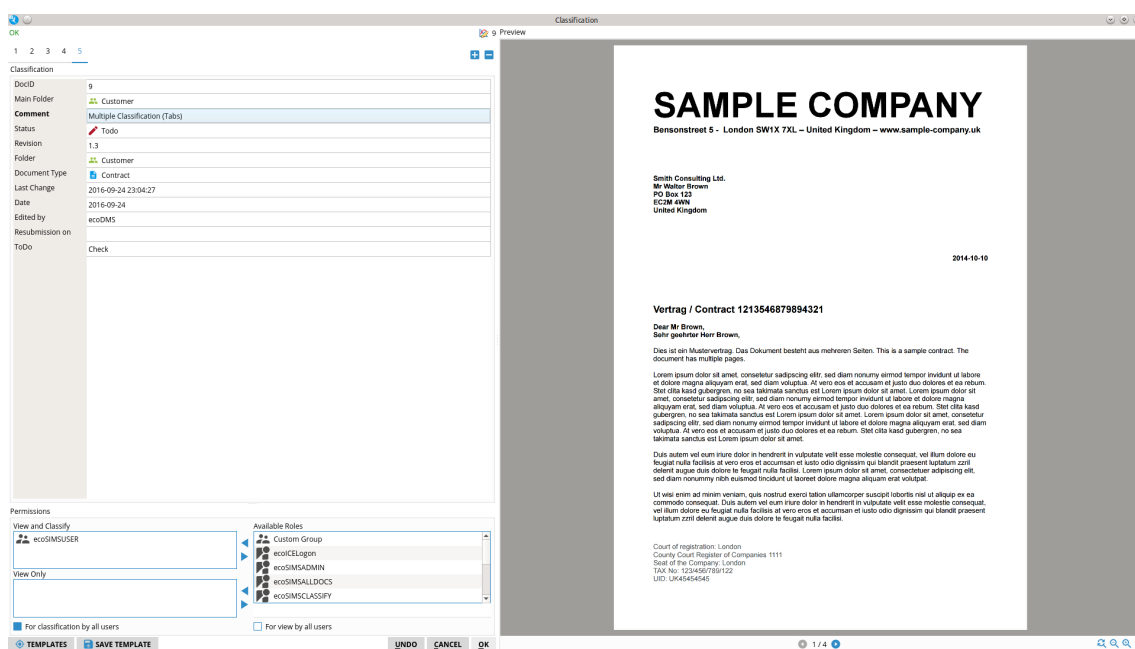
Figure 9.13: Multiple Classification

9.6.1 Multiple Classification / Add Tab

To assign additional classifications to a document, you must first create the document on separate tabs. You can edit and remove the tabs, if required, as long as you did not confirm the classification with "Save" or "OK". You can only edit and delete individual tabs until ecoDMS has saved and completed the classification. Editing a classification is still possible after saving. To do this, you require a permission for this classification entry. To delete such an entry, carry out the standard ecoDMS deletion process (delete function). To assign further classifications to a document, complete the following steps [3, 4]:

1. Select document in the ecoDMS table.

2. Select the "Classify" function. You have following options:

   a) Right-click one of the selected documents - Classify **or**

   b) Click the "Classify" icon in toolbar **or**

   c) Enter this shortcut: CTRL + K

3. Enter the Classification Information (if not yet available)

4. To add "Multiple Classification" click the icon "Add Multiple Classification".

   a) Another classification window opens as a tab

5. Enter the additional information

   a) If necessary, you can add as many tabs as you like.

6. Save classification with "OK", or cancel the process with "Cancel".

9.6.2 Multiple Classification / Remove Tab

To assign additional classifications to a document, you must first create the document on separate tabs. The tabs can be edited and also removed, if required, as long as the classification was not confirmed with "Save" or "OK". The individual tabs can only be edited and deleted until the classification has been saved and completed. Editing a classification is still possible after saving. To do this, the user requires a permission for this classification entry. To delete such an entry, carry out the standard ecoDMS deletion process (delete function). To remove a non-saved classification tab to a document, complete the following steps [3, 4]:

1. To remove "Multiple Classification" click the icon "Remove Multiple Classification".

   a) The selected "Tab" will be deleted.

2. Save classification with "OK", or cancel the process with "Cancel".

9.6.3 Show Multiple Classification

If "Multiple Classifications" were saved to a document the DocID for the respective document in ecoDMS is assigned several times. When you open the Classification dialogue for one of the multiple archived documents, the dialogue shows all available tabs for which the user has permission [3].

1. Select document in the ecoDMS table.

2. Select the "Classify" function. You have following options:

   a) Right-click one of the selected documents - Classify **or**

   b) Click the "Classify" icon in toolbar **or**

   c) Enter this shortcut: CTRL + K

9.7 Undo Classification

You can undo a classification if necessary. All classification attributes of the selected document are then returned to the state it was last saved in.

- For newly archived documents all classification attributes are reset in this case.

- For already archived documents, the classification is reset to the last saved state.

To undo the classification of a document, complete the following steps [3]:

1. Classify an ecoDMS document via the Classification dialogue.

2. Click "Undo".

Important Information for Chapter 9

[1] *Administratoren können über den Einstellungsdialog für jede Dokumentenart die passenden Klassifizierungsattribute und Pflichtfelder definieren. Die Anzeige und Reihenfolge der Attribute ist demnach immer abhängig von den Einstellungen.*

[2] *Die Anlage und Verwendung von Benutzergruppen wird empfohlen. Das erleichtert die Klassifizierung und Zuordnung enorm.*

[3] *Diese Funktion setzt zur Ansicht und Nutzung bestimmte System-Berechtigungen voraus.*

[4] *Ein Dokument darf nur klassifiziert und versioniert werden, wenn dem Benutzer für das jeweilige Dokument eine entsprechende Berechtigung zur Klassifizierung vorliegt.*

10 Classification Templates

Customised classification templates allow automatic document recognition, assignment and archiving. Incoming documents can be automatically assigned according to specified attributes and archived without further user action in a dark process if required. Document recognition is based on pre-configured keywords, barcodes, layouts or identified zones, which are saved in so-called classification templates. If a document which matches a template reaches the archive, the template designer automatically searches for the matching classification template and executes the processes specified in the template.

- Successful execution of the classification templates depends on the file type, the content, and the readability and quality of the documents.
- By default, every user with a permission to archive and classify documents can use classification templates.
- To create and edit classification templates, the system requires an additional permission (ecoSIMSTEMPLATES).
- Automatic document assignment is based on classification templates. A template specifies how the document is (automatically) stored / classified in ecoDMS. ecoDMS can differentiate between simple templates and form templates.
- Template recognition is performed for...
  - PDF and TIFF files during standard and drag & drop archiving in ecoDMS (Windows, Ubuntu, Debian, macOS),
  - PDF and TIFF files of documents scanned in via scaninput (Windows, Ubuntu, Debian, macOS),
  - files archived via PDF/A Printers (Windows, Ubuntu, Debian),
  - files archived via Libre / OpenOffice Plugin (Windows, Ubuntu, Debian, macOS),
  - files archived via MS Office Plugin, including Outlook (Windows),
  - files archived via Thunderbird Plugin (Windows, Ubuntu, Debian)
- If ecoDMS recognises several classification templates for a document, it displays them on tabs as mass classification in the Classification dialogue.
  - **Before** archiving, delete all classification tabs that do not apply.
  - Otherwise the document is archived with multiple classifications (mass classification).
  - The document number (DocID) would in this case occur several times and with different classifications in ecoDMS.
  - The classification of the individual DocIDs depends on the retrieved classifications.
  - To avoid loading various classifications, we recommend you assign unambiguous criteria when creating your classification templates.
- **Information:** This feature requires a licence of the ecoDMS full version but can be tested during the demo time. In the Free4Three version you can save a maximum of 1 classification template.
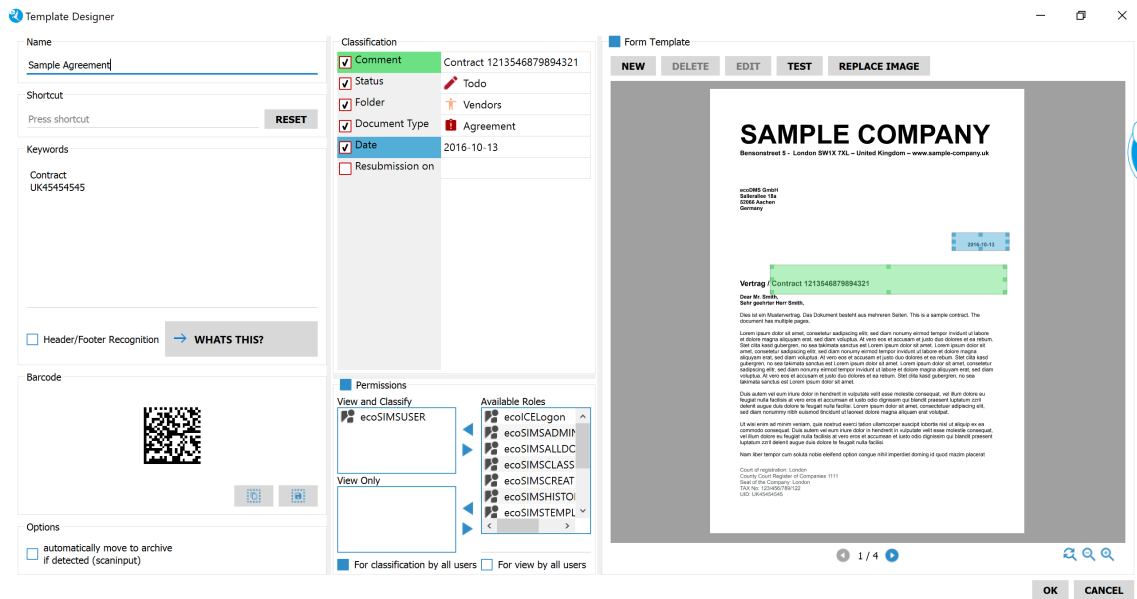
Figure 10.1: Template Designer for Creating Classification Templates

10.1 Manage Templates

You can open template management through the Classification dialogue of any document. Different functions are available depending on your user permissions. Please note that you require the ecoSIMSTEMPLATE system permission "The user may use template management" to manage classification templates.

10.1.1 Open Template Management

You have the following options to open template management. Select one:

1. **Classification dialogue:**
   a) Open the Classification dialogue of any document.
   b) To open template management, click the "Templates" button.

2. **Toolbar:**
   a) Select a document in the ecoDMS table.
   b) To open template management, click the "Template" icon in the toolbar.

Figure 10.2: Open Template Management (Icon)

10.1.2 Apply Template

Template recognition is either automatic (depending on the settings and on the document) or the template is selected manually. The following options are available to manually retrieve a template [2, 3, 1]:

1. Open the Classification dialogue of the respective document.

2. Three options are available:
   a) Click the "Template" button in the Classification dialogue, select the required template and click "Apply".

    b) Right-click in the "Permissions" area and then click "Templates" to select the required template from the list.

    c) If a keyboard shortcut is defined for the required classification template, enter the shortcut.

3. The classification defined in the template is accepted.

10.1.3 Edit Template

If you have the respective permission, you can edit existing templates [2, 3, 1]:

1. Open the Classification dialogue of a document.

2. Click the "Templates" button.

3. In the Classification Templates dialogue, select the template you want to edit.

4. Click "Edit".

5. Make your changes.

6. Click "OK" to save the process or abort the process by clicking "Cancel".

10.1.4 Replace PDF File

If you want to replace the PDF file (template master) for an existing classification template, complete the following steps[2, 3, 1]:

1. Open the Classification dialogue for the document which serves as the new template master.

2. Click the "Templates" button.

3. In the Classification Templates dialogue, select the template you want to edit.

4. Click "Edit".

5. In the "Form Template" window, click the "Replace Image" button.

6. ecoDMS replaces the existing file preview with the classification preview of the new file.

7. Click "OK" to save the process or abort the process by clicking "Cancel".

10.1.5 Select Templates

You can assign templates manually to documents or let the system do this automatically.

1. You can select templates manually in the Classification dialogue and use them for Classification.

2. The template recognition can also be started manually in the Inbox after scanning (e.g. for imported documents or documents scanned via TWAIN/WIA/SANE).

10.1.6 Copy Template

If you have the respective permission, you can copy existing templates [2, 3, 1]:

1. Open the Classification dialogue of a document.

2. Click the "Templates" button.

3. In the Classification Templates dialogue, select the template you want to copy.

4. Click "Copy".

5. Enter a name for the new template.

6. The Template Designer opens.

    a) Make any changes if necessary.

7. Click "OK" to save the process or abort the process by clicking "Cancel".

10.1.7 Delete Template

If you have the respective permission, you can delete existing templates[2, 3, 1]:

1. Open the Classification dialogue of a document.

2. Click the "Templates" button.

3. In the Classification Templates dialogue, select the template you want to delete.

4. Then click "Delete".

5. Click "OK" to save the process or abort the process by clicking "Cancel".

10.2 Create Simple Templates

- Simple templates are based on keywords that must occur in the document to ensure the assignment is performed as specified.
- The document layout is not considered in this case.
- The user enters the keywords in the template designer, which ecoDMS saves as classification template.

ecoDMS can automatically classify documents based on their contents. To do so, ecoDMS needs to know the necessary keywords that occur in the document. You can enter the keywords in the template designer. If ecoDMS archives the document which matches the specified template criteria, the software automatically fills in the classification attributes according to your specifications.

10.2.1 Create Template

To create a simple template (without additional form / layout recognition), complete the following steps[2, 1]:

1. Open the Classification dialogue for any document.

2. Execute the "Save Template" function. To do this, you have the following options:
    a) Click the "Save Template" button.
    b) Right-click the mouse in the Permissions window and select "Save Classification as Template".

3. The Template Designer opens. To create a "simple template" with Keyword Detection, use the following fields:

4. **Name:** Enter a name for the template. Use the name to retrieve and recognise the template.

5. **Keyboard shortcut:** As an option, you can store a shortcut. You can use this shortcut later to open the "classification template" manually in the Classification dialogue.
    a) Use the "Reset" button to remove the "shortcut".

6. Now specify the relevant criteria for the form template.
    a) This is described in the following steps.

7. **Automatic recognition:** You can only enable this field in combination with a "formula template". To create a pure "Keyword template" the function is not necessary.

8. Save the template with "OK" or abort the process with "Cancel".

10.2.2 Keywords

Enter the keywords which are prerequisite for template recognition. The "template" is only recognised and executed if the document, in addition to the layout, contains exactly those keywords. In case of a successful match and recognition, the stored classification information is loaded.

– If you use keywords, all keyword deposited in ecoDMS must exactly match the words in the document. Use unambiguous terms, e.g. the VAT-ID or the customer number of a company.

– Enter keywords without a hyphen or a comma. The recorded words are " and" -linked.

– For the detection, all detected items must be included in the document in the same notation.

Example: The document has the following contents: These contents are required for the application of the classification saved in the template. Enter the contents one by one:

```
UID: 123456789
Invoice
```

10.2.2.1 Expert Funcion (RegEx)

As an option, you can extend the keyword recognition with regular expressions. In this way, you can limit the search results even more accurately. Please use a separate line for each command: The following examples are a small extract from the many possibilities offered by calling a "REGEX":

1. Document contains "Invoice"

```
REGEX:\b(Invoice)\b
```

2. Document contains "Invoice" or "Delivery Note"

```
REGEX:\b(Invoice|Delivery Note)\b
```

3. Document does not contain "Contract"

```
!REGEX:\b(Contract)\b
```

4. Document contains "Invoice" but not "Contract"

```
REGEX:\b(Invoice)\b
!REGEX:\b(Contract)\b
```

5. You can also use a combination of REGEX and simple keywords.

10.2.3 Options (for Scaninput Folder)

When creating a template, you can configure whether you want the document to be saved automatically in ecoDMS without manual action by a user.

1. To activate "Automatic archiving", you must enable the checkbox "If recognised, automatically store in archive" in the "Options" section of the Template Designer.

2. Then select the "Target archive".

   a) This process is exclusively possible for documents that have been retrieved via the "scaninput folder" and are successfully recognised by the template designer.

   b) If several classification templates that have been assigned different target folders are recognised for a document, the document is not archived automatically. The document is opened in the Inbox.

   c) If this function is not enabled or the template is not automatically recognised, the scanned document is opened in the Inbox for manual classification and archiving.

10.2.4 Classification

1. Fill in the attributes in the classification window.

   a) Assign the values which you want to save for the classification.

2. Then enable the attributes you want to be accepted when the classification template is executed, by checking the boxes in the classification window.

   a) When the template is executed, only those attributes are overwritten, which are enabled in this area. All other attributes are not affected by the template.

   b) You can enter the values manually **or** let the system read the values automatically using the coloured fields in the document.

3. As an option, you can enable the Permissions for the "Classification Template". In this case the Permissions stored here are also used for Classification.

4. Save the template by clicking "OK" or cancel the operation with "Cancel".
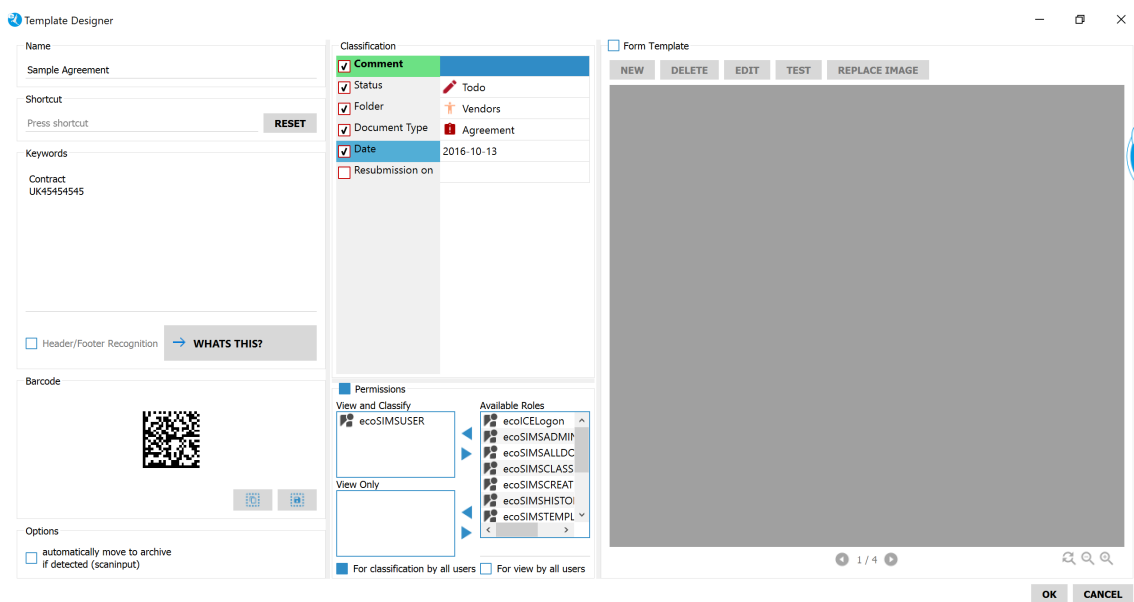
Figure 10.3: Classification Template - Simple Template

10.3 Create Form Templates

The content of specific zones of a one or multi-page document can be accepted automatically for classification. ecoDMS, for example, recognises the invoice number, the date, the invoice total or the matching target folder and populates the Classification dialogue with the recognised values. To do so, the user marks the respective zones once in a base document. If documents have a different number of pages, you can specify the target page (Example: The invoice total is always on the last page).

10.3.1 Create Template

To create the classification attributes with the "form template", complete the following steps:

1.

> – **Information:**
>   – **Form templates are based on layouts and positions in a document.**
>   – **The user specifies the document layout in the template designer, which ecoDMS saves as template.**
>   – **Moreover, the user can highlight fields in the document in colour.**
>   – **The content of these fields is then included in the selected classification attributes.**
> – **Tip:**
>   – **When creating your classification template, use a PDF document as a master for layout and content. In the Template Designer, you can then select the required text zones and assign the content of each text zone to a classification attribute. If a matching document is archived, ecoDMS populates the recognised attributes automatically.**

Open the Classification dialogue for the document which should serve as the new form recognition template.

> Make sure that this is a PDF file. Otherwise the preview for creating of the "form template" cannot be displayed.

2. Execute the "Save Template" function. To do this, you have the following options:
   a) Click the "Save Template" button **or**
   b) Right-click the "Permissions" area and select "Save Classification as Template".

3. The Template Designer opens. To create a form template, complete the following steps:

4. **Enable the "Form template" checkbox.**

5. <u>Name:</u> Enter the name for the template. Use the name to retrieve and recognise the template.

6. <u>Keyboard shortcut:</u> As an option, you can save a keyboard shortcut here. This keyboard shortcut can be used later to manually open the classification template in the Classification dialogue.
   a) Use the "Reset" button to remove the "keyboard shortcut".

7. Now specify the relevant criteria for the form template.
   a) This is described in the following steps.

8. Save the template with "OK" or abort the process with "Cancel".

10.3.2 Header / Footer Recognition

This checkbox can only be enabled in combination with a form template. The Form Template option must therefore be enabled. If this option is enabled, ecoDMS reads the header and footer of a document in the background and saves it as an essential property for recognising the classification template.

> – Depending on the resolution and the quality, approx. 10 - 20 percent of the upper and the lower part of a document are stored in the template as identifying feature.
> – If no other criteria (keywords) are stored, the header and footer of the document must match the template to execute automatic pre-classification.
> – If you want to enter additional keywords, the keywords and the headers and footers must match the template for the template to be recognised.

10.3.3 Keywords

As an option, you can enter the keywords which, in addition to the layout, are prerequisite for template recognition. The "template" is only recognised and executed if the document, in addition to the layout, contains exactly those keywords. In case of a successful match and recognition, the stored classification information is loaded.

1. **Copy Single Text Snippet:**

```
STRG + Win
```

Click the "Keywords" section. If you now press the indicated keys and select a text snippet in the preview window of the template designer by holding down the right mouse button, the keywords field is populated with the selected text snippet.

2. ***Copy Multiple Text Snippets:***

```
STRG + Shift + Win
```

Click the "Keywords" section. If you now press the indicated keys and select several text snippets in the preview window of the template designer by holding down the right mouse button, the keyword field is populated with the selected text snippets in the order of selection (one after the other).

When using keywords, you must note the following information:

1. If you use keywords, all keyword deposited in ecoDMS must exactly match the words in the document. Use unambiguous terms, e.g. the VAT-ID or the customer number of a company.

2. Enter keywords without a hyphen or a comma. The recorded words are " and" -linked.

3. For the detection, all detected items must be included in the document in the same notation.

Example: The document has the following contents: These contents are required for the application of the classification saved in the template. Enter the contents one by one:

```
UID: 123456789
Invoice
```

10.3.3.1 Expert Funcion (RegEx)

As an option, you can extend the keyword recognition with regular expressions. In this way, you can limit the search results even more accurately. Please use a separate line for each command: The following examples are a small extract from the many possibilities offered by calling a "REGEX":

1. Document contains "Invoice"

```
REGEX:\b(Invoice)\b
```

2. Document contains "Invoice" or "Delivery Note"

```
REGEX:\b(Invoice|Delivery Note)\b
```

3. Document does not contain "Contract"

```
!REGEX:\b(Contract)\b
```

4. Document contains "Invoice" but not "Contract"

```
REGEX:\b(Invoice)\b
!REGEX:\b(Contract)\b
```

5. You can also use a combination of REGEX and simple keywords.

10.3.4 Options (for Scaninput Folder)

When creating a template, you can configure whether you want the document to be saved automatically in ecoDMS without manual action by a user.

1. To activate "automatic archiving", enable the checkbox "Automatically move to archive if detected" in the "Options" section of the Template Designer.

2. Then select the "target folder".

   a) This process is exclusively available for documents that have been retrieved via the "scaninput folder" and are successfully detected by the template designer.

   b) If ecoDMS detects several classification templates that have been assigned different target folders, the document is not automatically archived. It opens in the Inbox instead.

   c) If this function is not enabled or the template is not automatically recognised, the scanned document is opened in the Inbox for manual classification and archiving.

10.3.5 Classification

1. Fill in the attributes in the classification window.

   a) Assign the values which you want to save for the classification.

2. Then enable the attributes you want to be accepted when the classification template is executed, by checking the boxes in the classification window.

   a) When the template is executed, only those attributes are overwritten, which are enabled in this window. All other attributes are not affected by the template.

   b) You can enter the values manually **or** let the system read the values automatically using the coloured fields in the document.

3. As an option, you can enable the permissions for the "Classification Template". In this case the Permissions stored here are also used for Classification.

10.3.6 Define Zones

To

- ecoDMS can automatically populate the classification with the contents of specific text zones in a PDF document. For example, ecoDMS can detect the invoice total at the end of a document with one or more pages and display the invoice total as a value in the classification.
- Moreover, specific RegEx calls enable the automatic assignment of a folder based on specific text passages or bar codes. Reading the date and any other text is also possible.
- For ecoDMS to recognise the required information, mark the respective zones in the document via the template designer and assign them to a classification attribute.
- After saving, the classification template becomes available to all users.
- In order to obtain exact results during automated classification, the selected PDF should match future PDFs of this kind in content and layout.

specify the required text zones and their classification attributes, complete the following steps:

1. Click "New" in the "Form Template" window. The "Form Field" dialogue opens:

2. Select the appropriate attribute from the list of available attributes.

   a) Click the "Colour Box" to specify a colour. The colour is then used when marking and accepting the field information. Tip: Assign a different colour to each attribute!

   b) 1. Confirm your selection with "OK" or abort the process with "Cancel".

3. In the following dialogue you can select the target attribute for the highlighted section.

4. **As an option, you can then make further settings.**
   a) **These depend on the selected attribute.**
   b) **The following subitems explain the available settings.**

5. Confirm the process with "OK", or abort the process by clicking "Cancel".

6. A box in the selected colour displays in the document preview. Position the box over the document zone that you want to read and accept for the selected attribute. Make sure that the box covers the selected content in a way that does not include too little and not too much information.
   a) You can resize the box to any hight and width. To resize the box, drag the outer points of the box.
   b) Use the "Zoom" icons to zoom the preview.
   c) Right-click and hold the mouse to select and zoom areas.
   d) Double-click the preview to adapt the page to the window.

7. Click "Test" to test the form.
   a) The classification of the "Template designer" is populated with the recognised content.

8. You can repeat this process for other attributes if required.

9. 18. Click "OK" to save the template or click "Cancel" to abort the process.
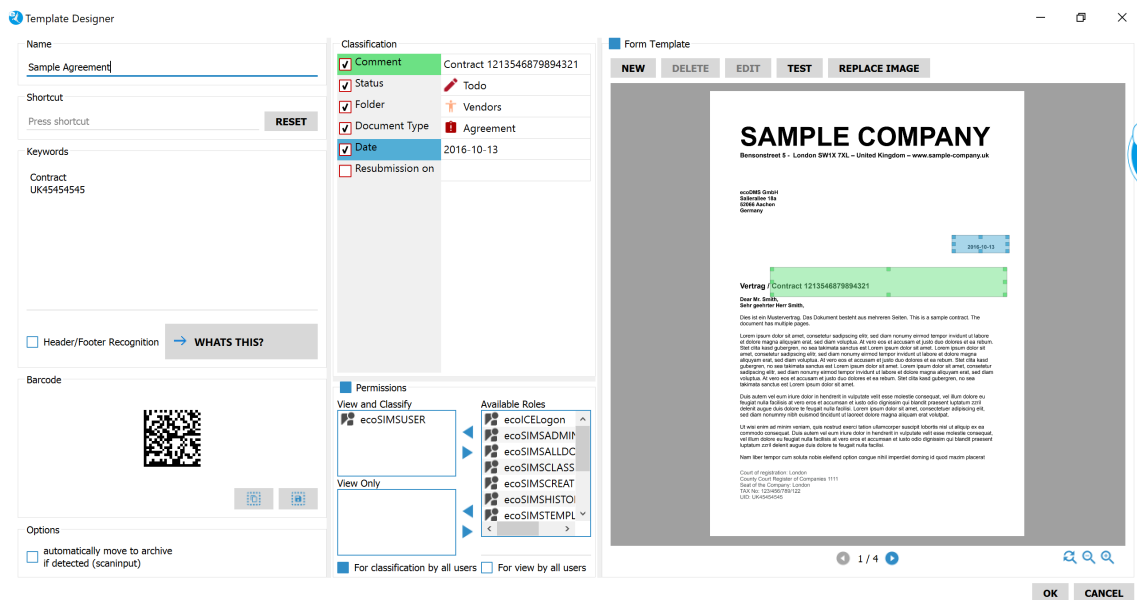
Figure 10.4: Classification Template - "Form Template"

10.3.6.1 Search Settings

1. Search on last page: Enable this function if the target document can be one or multi-page and the required value is always on a specific page.

2. Page offset: For multi-page documents you can select which page contains the required content. First, enable the "Search on last page" function. The following examples show the value for the page offset:
   a) The invoice total is always on the last page of a document.

   ```
   0
   ```

   b) The invoice total is always on the penultimate page of a document.

   ```
   -1
   ```

3. Depending on the classification attribute, you can also make additional settings. To do so, enable the "Options" setting.
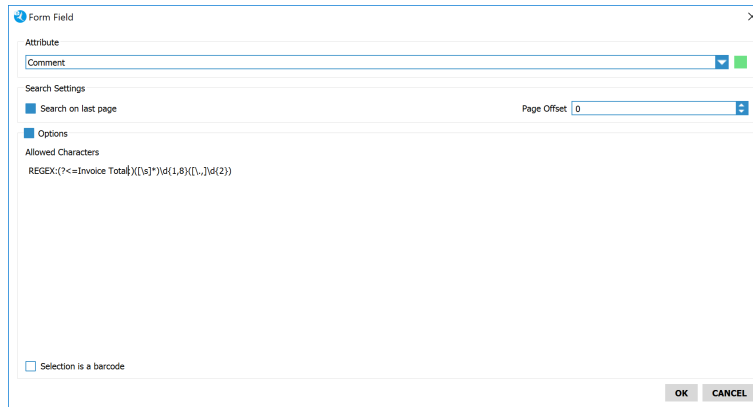
Figure 10.5: Form Template - Search Settings (Last Page)

10.3.6.2 Date Format or RegEx

The date format can vary and may deviate from the normal standard. In the Options field, you can define the format of the date you want to read. The following expressions are available:

d = one-digit day of the month without leading zero (1-31)

dd = two-digit day with leading zero (01-31)

ddd = three-character short form of the localised weekday (Mon-Sun)

dddd = full name of the localised weekday (Monday-Sunday)

M = one-digit month of the year without leading zero (1-12)

MM = two-digit month of the year with leading zero (01-12)

MMM = three-character short form of the localised month (Jan-Dec)

MMMM = full name of the localised month (January-December)

yy = two-digit year (00-99) yyyy = four-digit year (e.g. 2019)

Examples:

dd.mm.yyyy 10.12.2018

mm/dd/yyyy 12/30/2018

d-M-yy   8-12-18
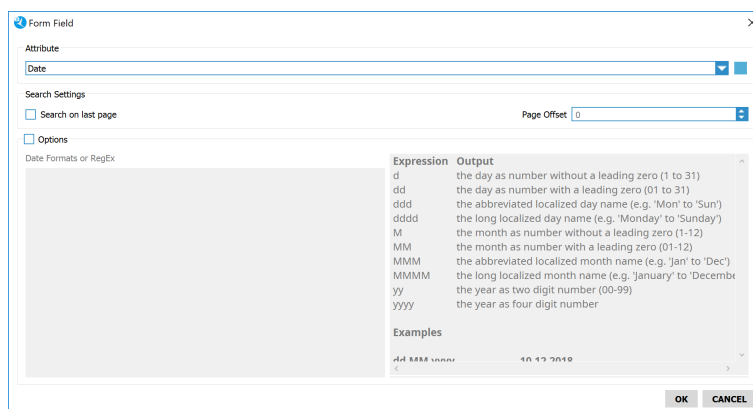
Figure 10.6: Form Template - Options - Date Formats

10.3.6.3 Permitted Characters (e.g. For Folders & Text Zones)

You can define characters in the highlighted area that ecoDMS should include in the classification. Specify the associated positions immediately after saving the changes to the dialogue. When reading each position in the document, ecoDMS only transfers the specified characters for this attribute. Enter the valid characters without separators, blanks, or similar. All characters you enter are declared as allowed and authorised values; this also includes blanks.

1. If you only want to transfer numbers from the highlighted area, enter the valid numbers.

    a) Example values for valid characters:

    ```
    0123456789
    ```

    i. Example contents in a document:

    ```
    ABC#1234 ecD24!
    ```

    A. Result for the classification when including the allowed characters:

    ```
    123424
    ```

2. If you only want to transfer numbers from the highlighted area, enter the valid letters. Please note the upper/lower case format.

    a) Example values for valid characters:

    ```
    AaBbCcDdEeFfGg
    ```

    i. Example contents in a document:

    ```
    ABC#1234 ecD24!
    ```

    A. Result for the classification when including the allowed characters:

    ```
    ABCecD
    ```

    ii. A combination of numbers, letters and special characters, etc, is also possible.

10.3.6.4 Expert Function (RegEx)

As an option, you can automatically read any text zones in a document with ecoDMS using regular expressions. The content you want to read need not be in the same position. However, it must occur in the area you highlighted. Specify the area immediately after saving the changes to the dialogue. By using REGEX, you can, for example, search for the invoice total in a document and let ecoDMS transfer this for the classification. Please note that you can only use the REGEX function here for free-text classification attributes. Also, make sure you write each command in a separate line. The following examples are a small extract from the many possibilities offered by calling a "REGEX":

1. You want to transfer the net total of an invoice for the classification. To do this, ecoDMS must search for the value in the document, which is located behind the word "Net Total:".

    ```
    REGEX:(?<=Net Total:)\s*(\d{0,3}\.{0,1}\d{1,3},\d{2})
    ```

    a) The document, for example, contains: Net Total: 289.95

    i. The output for the classification in this example is: 289.95

    ```
    (?<=Net Total:) searches the character string that follows "Net Total:"
    ([\s]*) Wildcard for one or more spaces
    This REGEX matches up to a total of 999,999,999.99. You can increase the upper limit
        by repeating the \d{0,3}\.{0,1} part of the expression.
    ```

    b) You want ecoDMS to transfer the term following the word "Name".

    ```
    REGEX:(?i)(?<=Name)([\s]*)\b([\S]*)\b
    ```

    i. The document, for example, contains: Name Doe

    ii. The output for the classification in this example is: Doe

```
(?i) ignores upper/lower case format
(?<=Name) searches for the character string that follows "Name"
([\s]*) Wildcard for one or more spaces
\b([\S]*)\b Wildcard for the following term until the next space
```
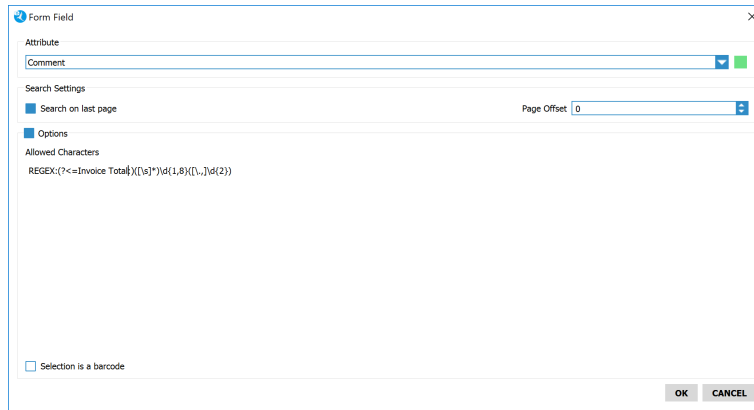

Figure 10.7: Form Template - Expert Function (RegEx)

10.3.6.5 Use the Following Information (Recognize Folder)

The folder can be assigned automatically based on the marked zones. For each folder you can save the name, a key and keywords in the settings dialogue. This information can be included when the folder is assigned. If, for example, a key is recognised in the marked zone, ecoDMS can automatically assign the associated folder. Check the required information for folder assignment.

1. Folder Name

2. External Key

3. Buzzwords
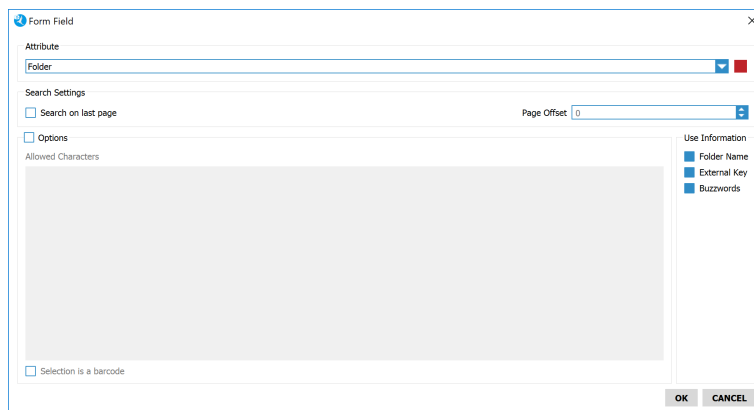
Figure 10.8: Formular Vorlage - Ordner automatisch erkennen

10.3.6.6 Selection is a Barcode

If the zone you want to read is a barcode, complete the following steps:

1. Enable the "Options" command.

2. Then click "Selection is a barcode".

   a) The content saved in the barcode is then transferred as the attribute value.

   b) The form recognition function reads the content of barcodes and of 2D barcodes.
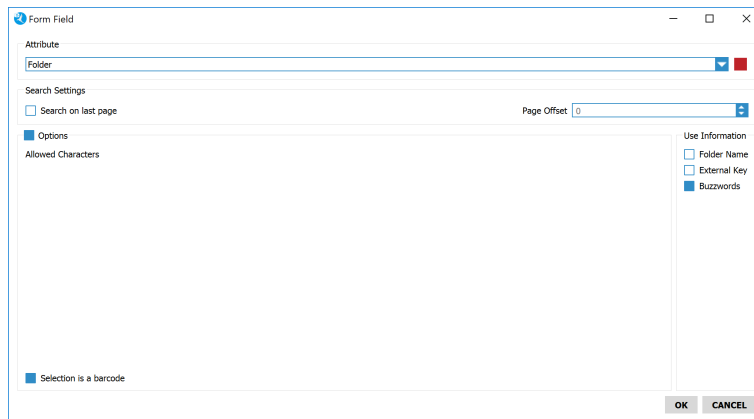
Figure 10.9: Form Template - Selection is a Barcode

10.4 Barcodes

- Saving a template automatically generates a barcode. The barcode contains the name of the template and calls the template upon recognition.
- As a rule, barcodes are used for "returned documents", i.e. for documents created "in-house" which are returned signed. (Example: Delivery notes).
- Barcodes are read during the scanning process via the scaninput folder.

This is how you can find the barcode of a classification template:

1. Select a document in ecoDMS using one of the following options:

2. The following functions are available:

   a) **Toolbar:** Click the "Templates" icon

   b) **Classification dialogue:** Click the "Templates" button

   c) **Template designer:** Open a template for editing

3. The barcode of a template displays in the overview of all classification templates and in the template itself. The following functions are available:

   a) **Export All Barcodes (only in the overview of all classification templates):** Saves all available barcodes as .jpg files to the selected folder:

      i. Select target folder

      ii. Start export

      iii. Barcodes are saved accordingly

   b) **Copy Barcode to Clipboard:** Copies the barcode of the selected classification template to the clipboard to be inserted into any writeable file.

   c) **Save Barcode As:** Saves the barcode of the selected classification template as .jpg file to the selected folder:

      i. Select target folder

      ii. Start export

iii. The barcode is saved accordingly
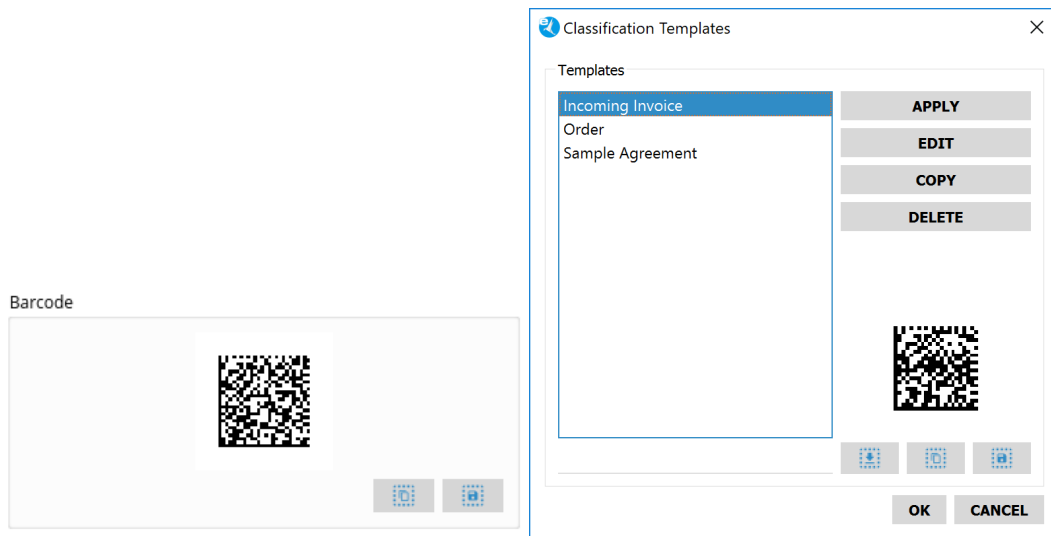
Figure 10.10: Template Designer: 2D Barcode

10.5 Dark Process: Automatic Archiving

- As an option, existing and successfully recognised classification templates can be processed in a dark process. In this case, users can archive the documents together with the matching classification information in ecoDMS, without having to do anything.
- This process is exclusively available for documents that have been retrieved via the "scaninput folder" and are successfully detected by the template designer.
- If ecoDMS detects several classification templates that have been assigned different target folders, the document is not automatically archived. It opens in the Inbox instead.
- This feature requires a licence of the ecoDMS full version but can be tested during the demo time. In the Free4Three version this function is not enabled.

To enable the Dark Process, complete the following steps:

1. Create a classification template with the ecoDMS Template Designer.

   a) If you want to activate the "Dark Process" for an existing template, you can open the template for editing and configure it accordingly.

2. To activate "automatic archiving", enable the checkbox "Automatically move to archive if detected" in the "Options" section of the Template Designer.

   a) Then select the "target folder".

3. Click the "OK" button to save the template.
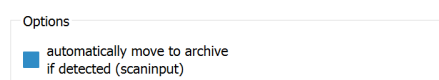
Figure 10.11: Template Designer: Automatically move to archive if detected

10.6 Switch Folder Recognition On / Off

The keywords deposited in the folder structure can also be used for automatic pre-classification. If a document is scanned and archived via the printer driver or via the Office Plugin, and no template is recognised, the document can still be assigned to the respective folder using the keywords. Folder recognition can be configured for each workstation.

1. Enter the appropriate keywords for the folders in the settings dialogue (refer to the "Settings" chapter).

2. Open the Classification dialogue to any document.

3. Right-click the Permissions window in the Classification dialogue.

4. Click the "Options" function.

5. Enable or disable the function with the "Keyword Recognition (Folder)" checkbox.
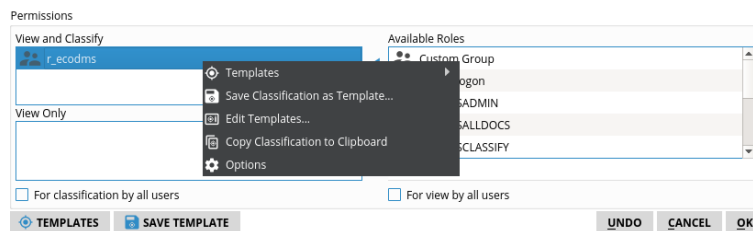
Figure 10.12: Classification - Permissions - Right Click
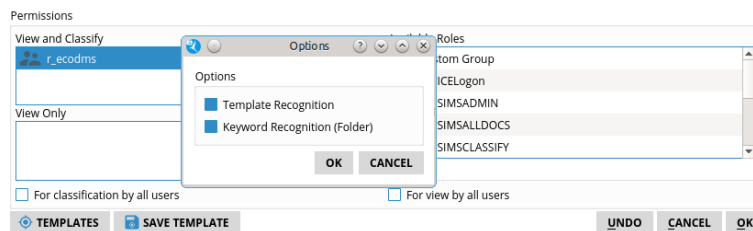
Figure 10.13: Classification: Switch on/off Folder and Template Recognition

10.7 Switch Template Recognition On / Off

Template recognition can be configured for the PDF/A Printer, email Plugins and Office Plugins on each workstation.

1. Open the Classification dialogue to any document.

2. Right-click the Permissions window in the Classification dialogue.

3. Click the "Options" function.

4. Enable or disable the function with the "Template Recognition" checkbox.
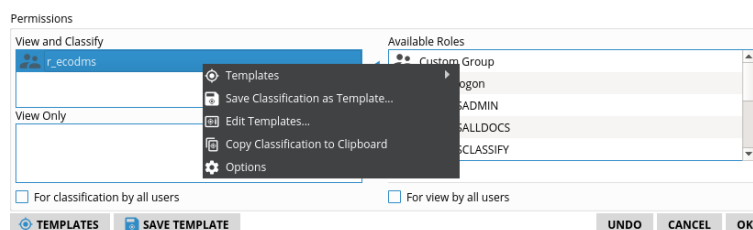
Figure 10.14: Classification - Permissions - Right Click
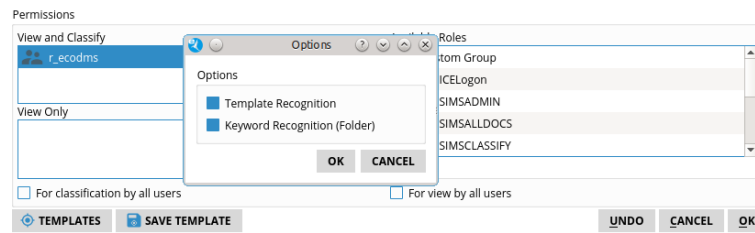
Figure 10.15: Classification: Switch on/off Folder and Template Recognition

Important Information for Chapter 10

[1] *Diese Funktion setzt eine Lizenz der ecoDMS-Vollversion voraus, kann aber in der Demozeit getestet werden und wird anschließend automatisch deaktiviert, bis eine Lizenz eingespielt wird.*

[2] *Diese Funktion setzt zur Ansicht und Nutzung bestimmte System-Berechtigungen voraus.*

[3] *Ein Dokument darf nur klassifiziert und versioniert werden, wenn dem Benutzer für das jeweilige Dokument eine entsprechende Berechtigung zur Klassifizierung vorliegt.*

11 Display, Download, Export

You can open the archived documents from ecoDMS and download (export) them if needed.

11.1 Export (Simple)

Documents can be exported directly from the table in ecoDMS [1]:

1. Select documents in the ecoDMS table.

2. Select now the "Export" function. You have following options:
   a) Right-click one of the selected documents - Export **or**
   b) Click the "Export" icon in toolbar **or**
   c) Click "File - Export" in menu bar **or**
   d) Enter this shortcut: CTRL + E

3. A new window opens. Select the destination path for exporting.
   a) Enable the checkbox "Export as Zip-archive" in the dialogue if you want to export data as ZIP-archive.
   b) Now name the Zip-archive.

4. Confirm your entry by clicking the "Open" button.
   a) Depending on the data volume the export may take some time.

Figure 11.1: Icon - Export

11.2 Export via Drag and Drop

If you want to export documents, you can drag the documents from ecoDMS into the file system with the mouse (but you cannot move them!) [1].

1. Click and press the left mouse button to select the documents in the table

2. Drag your selection to a location in your file system (e.g. on the desktop).

11.3 Reload Documents

When you start ecoDMS, documents and classifications are automatically retrieved and refreshed.

New files and classifications continually enter ecoDMS. To reload the overview of visible documents and classifications on your workstation, complete the following steps:

1. Toolbar: Click the "Reload" icon

Figure 11.2: Icon - Reload Documents

11.4 Open Documents

Open Single Document Directly:
- Table view: Double-click the DocID of a document

To open documents in ecoDMS, complete the following steps:

1. Select one or more documents in ecoDMS.
   a) Press and hold the CTRL key to select several documents at once.

2. Execute the "Open" function using one of the following options:
   a) Menu: File -> Open
   b) Table view: Right-click -> Actions -> Open
   c) Keyboard shortcut: CTRL + S

Figure 11.3: Icon - Show

11.5 Preview

- ecoDMS can only preview PDF files.
- Depending on file size and volume it may take a while for the documents to display.
- This feature requires a licence of the ecoDMS full version but can be tested during the demo time. In the Free4Three version this function is not enabled.
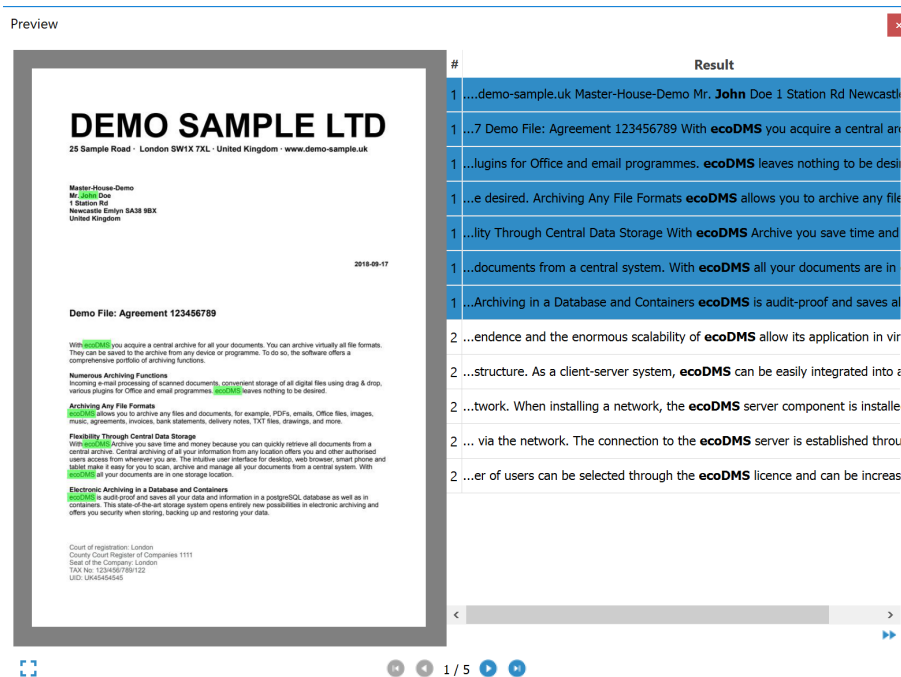
Figure 11.4: Document preview with full text recognition

11.5.1 Preview On / Off

Any user can switch the display of preview images on and off.

1. Right-click the Preview window.

2. Click "Quality of Preview".
    a) Disable the function by removing the check mark in the "Preview " menu item.
    b) Enable the function by setting the check mark in the "Preview " menu item.
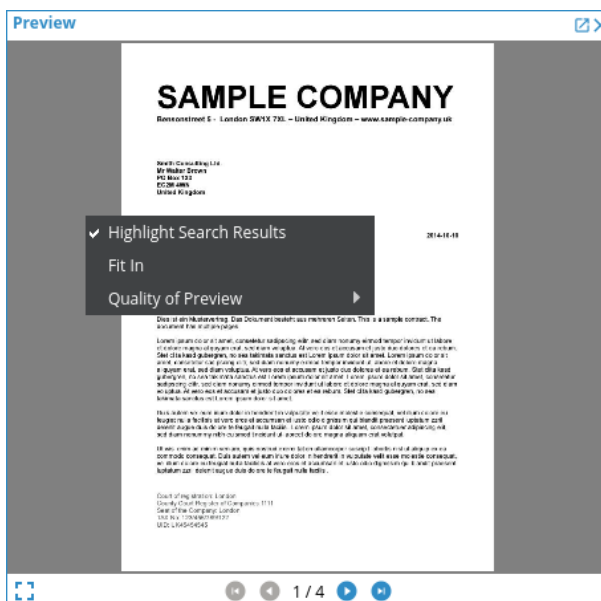
Figure 11.5: Preview On / Off

11.5.2 Quality of the Preview window

Every user can adjust the quality of the Preview window. The quality of the document has an immediate impact on the ability of ecoDMS to recognise the document. The higher the quality, the better the recognition. Please note that the loading time of the Preview window increases with increased quality.

1. Right-click the Preview window

2. Select the preview quality:

   a) Low
   b) Normal
   c) High
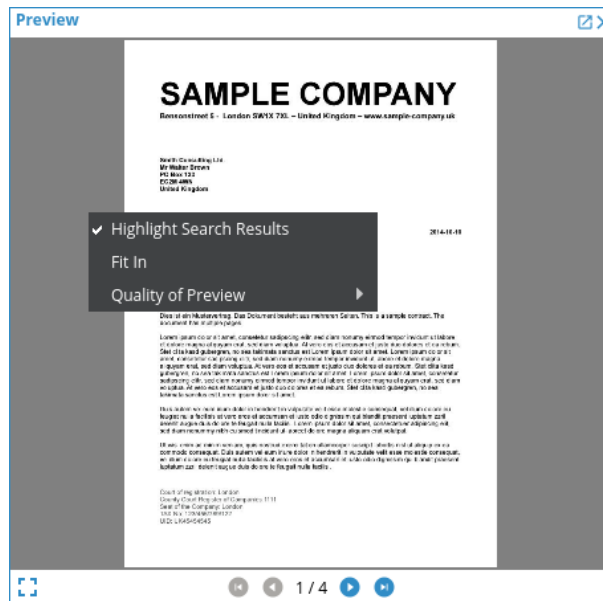
Figure 11.6: Quality of Preview

11.5.3 Highlight Recognized Text

> – This function is exclusively available in the default preview window. You can also enable the preview window in the Cards view as additional window (refer to View -> Windows Visibility).
> – Please note that these settings refer to the individual workstation and are not stored in the user profile.

In a full-text search, ecoDMS can highlight the recognised search terms in the preview window. If a term occurs multiple times in a document, ecoDMS also displays an overview of the text snippets containing the term in the preview window. Click the mouse to skip to the required passages. To manage the setting, complete the following steps:

1. Right-click the title bar of the preview window

   a) Enable "Highlight recognized text": Tick
   b) Disable "Highlight recognized text": Untick

11.5.4 Zoom Preview

You can zoom the document in the Preview window.

1. Scroll into or out of the document with the mouse.

2. Double-click on the preview image to re-fit image in the window.

11.5.5 Preview Full Screen

To view the preview in full screen mode, complete the following steps:

1. Click the Full Screen icon in the Preview window.

2. ecoDMS displays the preview in full screen mode.

   a) If a document has several pages, users can toggle from page to page.

Figure 11.7: Icon - Preview Full Screen

Important Information for Chapter 11

[1] *Beim Export und E-Mailversand aus ecoDMS erhalten die Dokumente den Bemerkungstext (Attribut) als Dateinamen. Übernommen werden Zahlen und Buchstaben.*

[2] *Diese Funktion setzt eine Lizenz der ecoDMS-Vollversion voraus, kann aber in der Demozeit getestet werden und wird anschließend automatisch deaktiviert, bis eine Lizenz eingespielt wird.*

[3] *Diese Funktion setzt zur Ansicht und Nutzung bestimmte System-Berechtigungen voraus.*

11.6 Data Export

- Only users (administrators) with the ecoSIMSAdmin role / permission can access this function. For all other users this function is not visible.
- When exporting data, the administrator can export all documents regardless of their permission.
- The documents are exported with all associated information and versions.
- The exported files are saved as ZIP files.
- The export duration depends on the technical system environment and the data volume.
- A complete and clean export process always takes some time.
- An offline reader is also exported to retrieve and view the documents offline" (without a connection to ecoDMS).
- This function requires a license for the full version of ecoDMS but can also be tested in the trial version. This function is not enabled in the Free4Three version.

Use the data export plugin, which is integrated in ecoDMS by default, to export and save selected documents and their classification attributes to any data carrier.
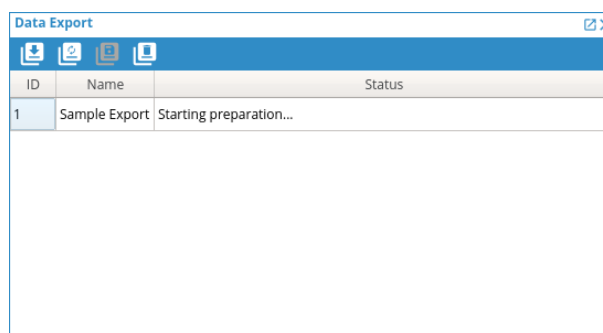
Figure 11.8: Window - Data Export

11.6.1 Export Data

The time required for export always depends on the technical system environment and the data volume. A complete and clean export process always needs some time. To export data, complete the following steps [3, 2]:

1. Select the window in your ecoDMS Client.

2. Click the "Create New Export" icon.

3. Enter the "export criteria". This operation is the same as the Extended Search (c.f. ecoDMS manual). Here, too, your "filter templates" are available as "export settings".

4. Assign a name to the "export" and click "OK" to continue.

5. The information you entered are now displayed in the Data Export area. It may take some time for ecoDMS to read in the files and prepare them for "export". The wait time depends on the data volume.

    a) You can retrieve the current status manually during the preparation. To do so, click the icon "Refresh Export Status". These are the following statuses:

        i. Starting preparation...

        ii. Preparing database...

        iii. Preparing files...

        iv. Preparation completed.

        v. Packing data...

        vi. Clean up...

        vii. Ready to download.

    b) You can start the export when the status is "Ready to download.".

6. Click the icon "Start Downloading Export".

7. A dialogue opens. Select the destination path and confirm your selection.

8. The export is executed.

Figure 11.9: Icon - Create New Export

Figure 11.10: Icon - Refresh Export Status

Figure 11.11: Icon - Start Downloading Export

11.6.2 Remove Export from List

To delete a request for data export from the list, complete the following steps [3, 2]:

1. Select the Data Export window in your ecoDMS Client.

2. Click the icon "Delete Export from List".

3. Confirm the confirmation prompt with "Yes".

4. You have now deleted the "Export" request.

Figure 11.12: Icon - Delete Export from List

11.6.3 Access Exported Documents

After the Data Export ecoDMS deposits a "ZIP file" in the selected destination folder.

1. Unpack the zip file.

2. Click through the folders until you find the "Archives" folder.
    a) This is where all exported documents / files and versions (if available) are archived.

11.6.4 Access XML Information

The Data Export also creates a XML file named "export.xml". The file includes all available classification and version information to the exported documents.

1. Unpack the zip file.

2. Click through the folders until you find the "Archives" folder.
    a) Here you will find the XML-file including all information.

Figure 11.13: Data Export - XML Sample

11.7 Offline Client

- Die ausführbare Datei "ecodmsclient.exe" zum Starten des ecoDMS Offline Clients liegt im Verzeichnis "offline_export".

- Der Offline Client kann ausschließlich unter Windows gestartet werden.

- Diese Funktion setzt eine Lizenz der ecoDMS Vollversion voraus, kann aber innerhalb der Demoversion getestet werden. In der Free4Three Version ist diese Funktion nicht aktiviert.

With the advanced Data Export (Plugin) ecoDMS also automatically saves an Offline Client. This can be used under Windows and offers all common ecoDMS search functions. This client does not require access to ecoDMS Server. The entire folder created when "Export Data" can be copied to any data carrier to allow external access to the exported documents without login and without an ecoDMS installation.

11.7.1 Start Offline Client

After the Data Export ecoDMS deposits a "ZIP file" in the selected destination folder.

1. Unpack the zip file.

2. Click through the folders to the folder which contains the "ecodmsclient" application.

3. Double-click the ecoDMS file to start the offline client.

    a) Now all common search functions, structures and exported documents are available offline.

12 Searches and Filters

ecoDMS has various search and filter functions. You can retrieve documents, meta data, classification information and notes by entering specific search criteria. The individual search and filter functions are described in this chapter.

- A search continues until the process is cancelled via the X icon in the search line. To reset all enabled filters, click the icon with the crossed out circle on the toolbar.
- By default, the system uses optical character recognition OCR on all text documents. This functionality is firmly built into ecoDMS.
- In addition, ecoDMS converts unreadable data such as not read PDFs, JPGs, PNGs and TIFFs (if possible) automatically into readable PDF/A files. Therefore, text from these files may also be included in the full-text search.
- There are, for example search queries using the full text recognition, searches within the generated folder structure and on the basis of the stored classification and notes information possible.
- ecoDMS recognises the content depending on the document resolution, format and quality.
- ecoDMS simultaneously indexes the meta data, classification attributes and notes.
- The documents and information must be readable for the system.
- Please note that we cannot guarantee 100 percent accuracy. The recognition depends on the contents and quality of your documents, information and files.
- If you want to search for document content and simultaneously for Classification Attributes and Notes, you must enable the Advanced Full-Text Search.
- The user can enter the search terms into the search line and the matching results are returned in the table.

12.1 Full-Text Search

- If a document preview exists for a retrieved file, the recognised words are highlighted in colour in the Preview window.
- If a keyword occurs several times within a document, ecoDMS also gives an overview of all occurrences of the keyword in the Preview window.

Read more in this manual under "Display - Preview".

The full-text search enables a search for document content and for classification attributes. The documents must be readable. However, we cannot guarantee 100 percent accuracy. The user can enter the search terms into the search line and the matching results are returned in the table [1].

12.1.1 Simple Full-Text Search

1. Select the command "Full-text" from the list in the search area.

2. Enter one or more words contained in the document you are searching for. For example:

```
Invoice Sample Company
```

3. To start the search confirm your entry with "Enter" or click the "Search" button.

   a) The system displays all search results where the words you are searching for are found with the same spelling.

> – If a document preview exists for a retrieved file, the recognised words are highlighted in colour in the Preview window.
>
> – If a keyword occurs several times within a document, ecoDMS also gives an overview of all occurrences of the keyword in the Preview window.
>
> Read more in this manual under "Display - Preview".

4. A search is active until the operation is closed with a click on the x-icon in the search line. To reset all active filters, click on the icon with the circle and white bar in the toolbar.
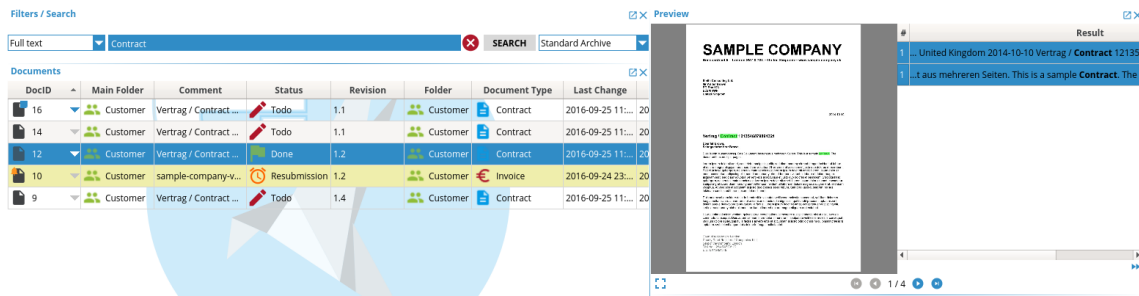
Figure 12.1: full-text search - Simple

12.1.2 Wildcard Search

Wildcards are placeholders and are represented by a question mark (?) or an asterisk (*).

1. In the search line, select "Full text" from the dropdown menu.

2. Enter one or more words that are contained in the file you are searching for. To do so, use wildcards.

   a) **Question mark (?):** This character replaces a letter and is used if, for example, the notation is unclear. For example:

   ```
   Me?er
   ```

   i. In this case, ecoDMS, for example, searches for words like "Mejer", "Meier", "Meyer"... . .

   b) **Asterisk (*):** Enter the asterisk if more values are to follow the entered values. For example:

   ```
   Test*
   ```

   i. In this case, ecoDMS searches for words starting with "Test" with any ending (e.g. testing, test-interval, tester...).

3. Confirm your entry with "Enter" or click the "Search" button to start the search.

   a) ecoDMS displays all results that match the search and contain all content.

4. A search continues until the process is cancelled via the X icon in the search line. To reset all enabled filters, click the icon with the crossed out circle on the toolbar.
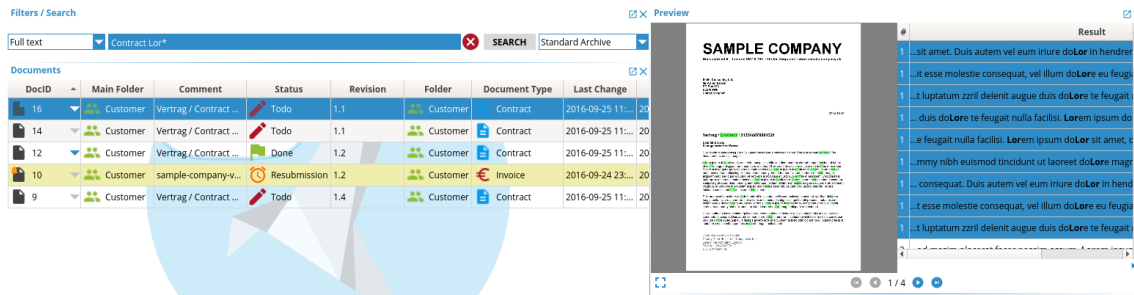
Figure 12.2: full-text search - Wildcard

12.1.3 Fuzzy Search

This function is a "fuzzy search". If a simple full-text search does not return the required result, we recommend this search function as an alternative.

1. In the search line, select "Full text" from the dropdown menu.

2. Enter one or more words that are contained in the file you are searching for. To do so, use "fuzzy logic" technology.

   a) **Tilde character (~):** Place the tilde character **at the end** of a word and perform a fuzzy search to search for words that are similar to the entry. For example:

   ```
   Meier~
   ```

      i. The search now focuses on documents which, for example, contain words like "Meier", "Meyer", "Maier".

3. Confirm your entry with "Enter" or click the "Search" button to start the search.

   a) ecoDMS displays all results that match the search and contain all content.

4. A search continues until the process is cancelled via the X icon in the search line. To reset all enabled filters, click the icon with the crossed out circle on the toolbar.
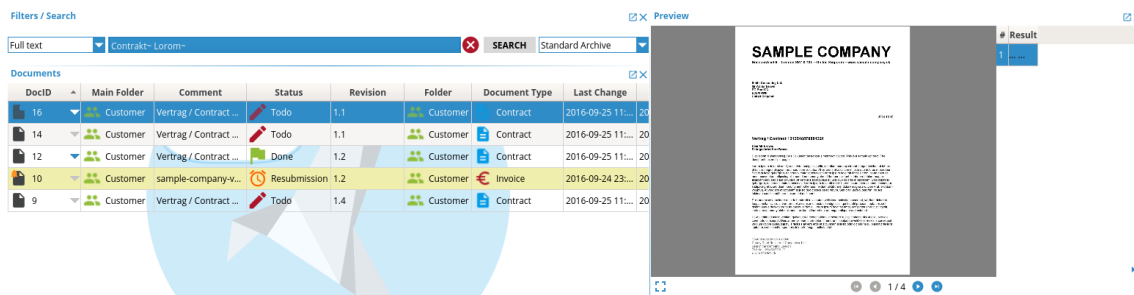
Figure 12.3: full-text search - Fuzzy Search

12.1.4 Boolean Operators

Use "Boolean factors" to create various operators such as AND, OR, +, - . Enter operators in capitals for searching in ecoDMS.

1. In the search line, select "Full text" from the dropdown menu.

2. Enter one or more words that are contained in the file you are searching for. To do so, use "boolean operators" technology.

   a) **OR:** Connect two words with this command to search either for one or the other word. For example:

   ```
   Sample OR Demo
   ```

i. This search entry searches for files that contain either the word "Sample" or the word "Demo".

b) **NOT / - :** Use these commands if you want to search for a file which does not include a specified word. Use either the value "NOT" or the value "-". Place the minus symbol directly before the word you want to exclude. For example:

```
Sample NOT Demo
```

```
Sample -Demo
```

i. These search entries search for files that contain the word "Sample" but not the word "Demo".

c) **AND / + :** These commands are used for an AND operation. The search terms connected with AND are all be contained in the file. You can either use the value "AND" or the value "+". Place the plus symbol directly before the words you want to include in the search. For example:

```
Sample AND Demo
```

```
+Sample +Demo
```

d) This search entry searches for files that contain the word "Sample" and the word "Demo".

i. **If you only enter search terms, without using +, -, OR or AND, the search terms are connected with AND.**

3. Confirm your entry with "Enter" or click the "Search" button to start the search.

a) ecoDMS displays all results that match the search and contain all content.

4. A search continues until the process is cancelled via the X icon in the search line. To reset all enabled filters, click the icon with the crossed out circle on the toolbar.
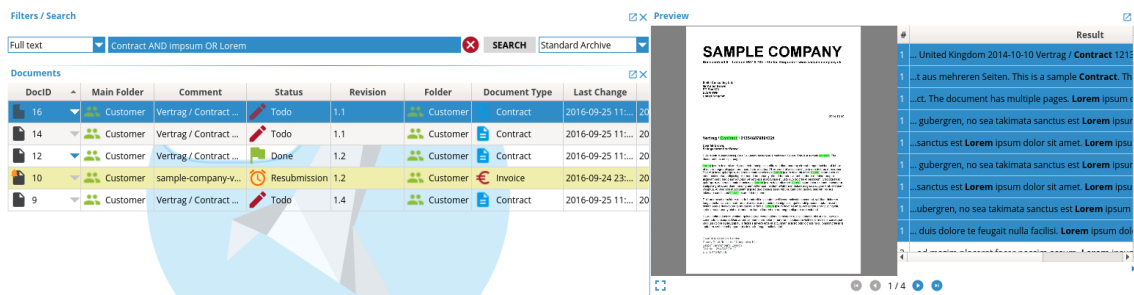
Figure 12.4: Full-Text Search: Boolean Operators

12.2 Extended full-text search

ecoDMS also recognises the meta data of a file, the available classification information and notes created in the archive. These can also be included in the search by enabling the extended full-text search. The Advanced full-text search includes Classification Attributes and Notes in addition to the contents of documents. If you want to search for document content and simultaneously for Classification Attributes and Notes, you must enable the Advanced Full-Text Search. You have several options to activate the Extended Search.

1. Click the menu "Options - Extended Search" **or**

2. Select the toolbar icon Extended Search **or**

3. Enter this shortcut: Ctrl + Shift + V

Figure 12.5: Icon - Extended Search

12.3 Extended Search

Use the Extended Search (Combined Search) to combine different search criteria, for example, status, date, document type, full text, etc. This allows the user to simultaneously search for various classification attributes and full text terms. If necessary, search requests can also be saved as filter templates [1].

12.3.1 Open Extended Search

To open the Extended Search, you have the following options:

1. Select the entry Extended Search from the list in search line **or**

2. Click the icon "..." in the Filter Templates window.

3. Enter the search criteria in the Extended Search dialogue.
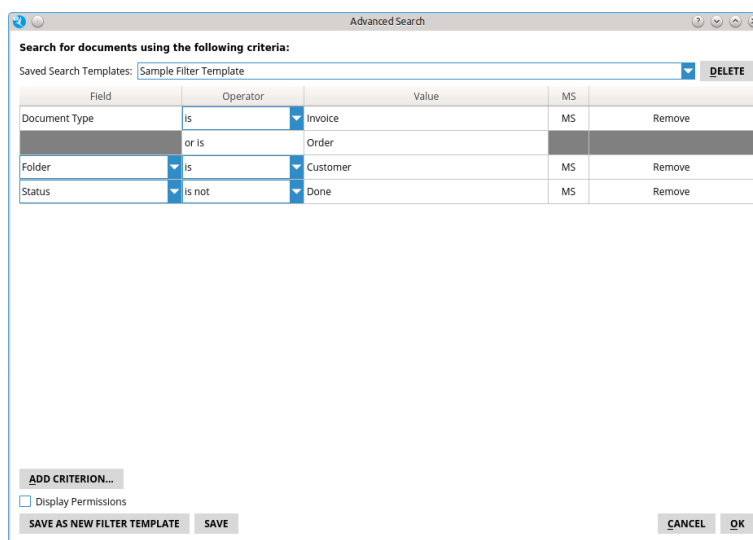
Figure 12.6: Extended Search

12.3.2 Enter Search Criteria and Start Search

1. Click the Edit icon to the right of the search box to open the Advanced Search dialogue (Dialogue name: Edit Search)

2. Enter your search criteria. The following fields are available:

    a) **Field:** Displays all searchable attributes and values you can select. Select an entry from the list.

    b) **Operator:** Specify the operator for the search. Depending on the field, the operators you can select vary. The following operators are available:

        i. contains

        ii. does not contain

        iii. greater / equal

        iv. greater than

        v. is

        vi. is not

        vii. smaller / equal

        viii. smaller than

    c) **Value:** Defines the search criterion in detail. Select from the values belonging to the "field" (e.g. the folder tree or a list of all document types)

d) **Icon (Multiple Selection):** Depending on the attribute, this function allows you to select several values and inserts them as OR operation into the search query

    i. In the multiple selection dialogue, click "Add value" to add further values in the form of an OR operator

    ii. Confirm your selection with "OK" or abort the process with "Cancel"

Example multiple selection:
Search for the document type "Incoming Invoice" **OR** "Outgoing Invoice" **OR** "Invoice Correction".

---

3. To add more search criteria, click the "Add Criterion" button.

    a) ecoDMS then inserts a new row for your search query. This is an "AND" operator.

Example for combining several rows with the
Row 1: Search for the document type "Incom
AND
Row 2: Status of the document is "To Do"

Results: ecoDMS only displays documents
"Invoice Correction" **or** whose status is "To D

4. Click "OK" to start the search. To cancel, click "Cancel".
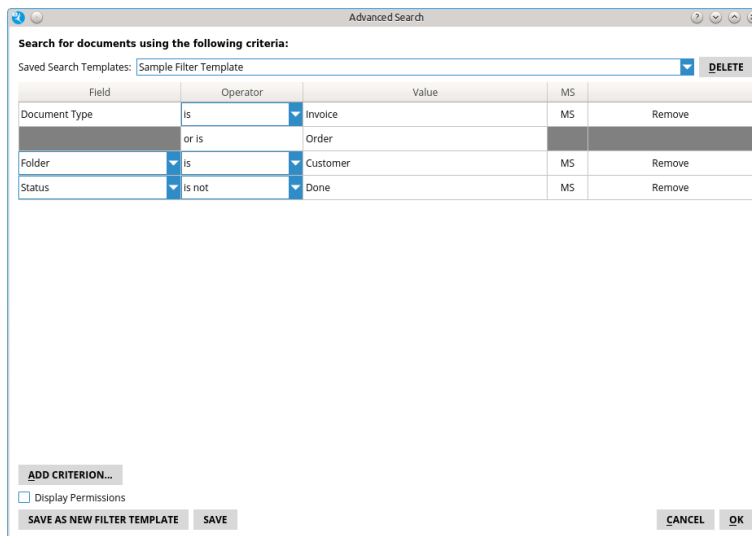
Figure 12.7: Extended Search
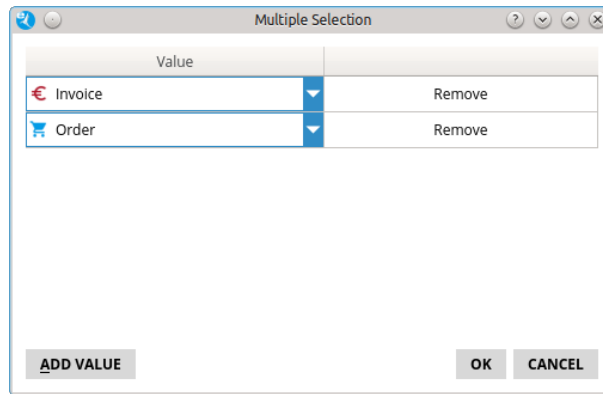
Figure 12.8: Extended Search - Multiple Selection

12.3.3 Remove Search Criteria

1. Open the Extended Search dialogue.

2. Select the search line you want to delete.

3. Click on the corresponding "Remove" button.
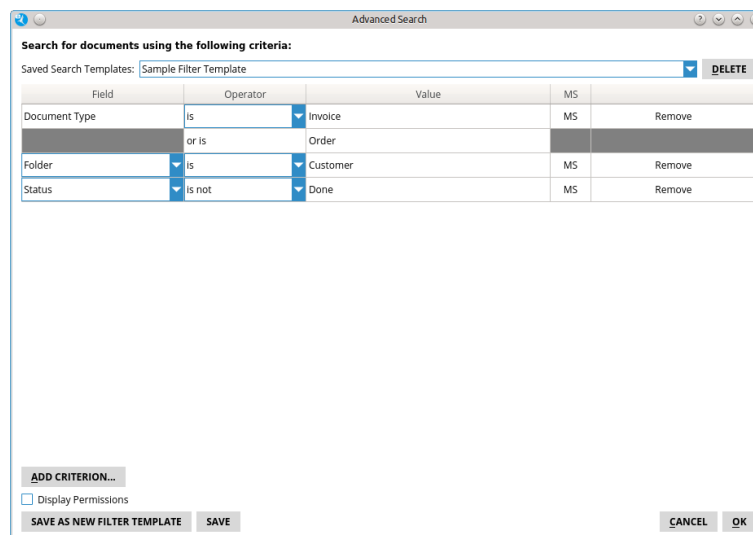
Figure 12.9: Extended Search

12.3.4 Example: Extended Search

Situation:

  – You want to display unpaid incoming and outgoing invoices of Joe Bloggs Ltd. between May 1, 2016 and May 31 2016.

Solution:

1. Open the Extended Search dialogue

2. Select the Document Type attribute

3. Select the "is" value in the "Operator" column.

4. Now select the value "Outgoing Invoices"

5. To also include incoming invoices, click the "MS" button (MS= Multiple Selection)
    a) Click "Add Value" and select the value "Incoming Invoices"
    b) Confirm your entry with "OK".

6. Now click "Add" at the bottom left in the dialogue
    a) This adds a new search row where you can enter the following values

7. Select the Status attribute in the "Field" column

8. Select the "is not" value in the "Operator" column.

9. Select "Done" in the "Value" column

10. Now click "Add Criterion" at the bottom left in the dialogue
    a) This adds a new search row where you can enter the following values

11. Select the "Folder" attribute in the "Field" column

12. Select the "is" value in the "Operator" column.

13. Select the folder "Joe Bloggs"

14. Now click "Add Criterion" at the bottom left in the dialogue
    a) This adds a new search row where you can enter the following values

15. Select the "Date" attribute in the "Field" column

16. Select the "Greater than or equal to" value in the "Operator" column.

17. Select the value "01.05.2016" as date.

18. Now click "Add Criterion" at the bottom left in the dialogue
    a) This adds a new search row where you can enter the following values

19. Select the "Date" attribute in the "Field" column again

20. Select the "Less than or equal to" value in the "Operator" column.

21. Select the value "31.05.2016" as date.

If you start the search now, ecoDMS displays the required documents.

12.4 Filter Templates

The extended search requests (Extended Search) can be saved as filter templates for one or more users, if required. The saved searches can then be selected on demand from the window "filter templates". The system differs between "My Filter Templates" and "Global Filter Templates". In addition, the filters can also be used for the Data Export [1].
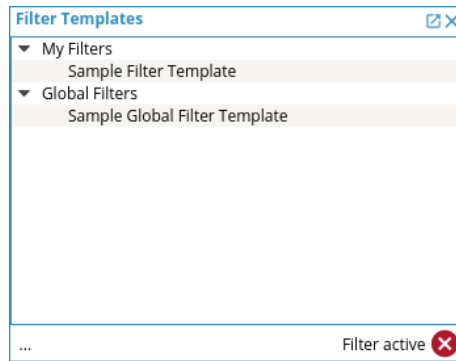
Figure 12.10: Window - Filter Templates

12.4.1 My Filter Templates

User-defined filters are created by the user and can only be seen by the individual user [1].

1. Open the Extended Search function as described in the chapter "Search - Extended Search".

2. Enter the search criteria for the Extended Search.

3. Click "Save New Search" to save the search criteria

4. Enter a name for the filter in the dialogue.

5. Confirm your entry with "OK". To cancel the operation, click "Cancel".

6. In the "Filter Templates" window, the search is displayed in the "My filters" area and can be executed with a double-click.

12.4.2 Global Filter Templates

Global filters are created by the administrator and are enabled for specific roles (users / groups) [2, 1].

1. Open the Extended Search function as described in the chapter "Search - Extended Search".

2. Enter the search criteria for the Extended Search.

3. Enable the "Display permissions" checkbox
   a) The Responsibilities window opens. Here you can specify who should receive the filter.
      i. Move the desired user / group from the "Available Roles" via drag and drop to the "Assigned Roles".
   b) To display a filter to all users, enable the "For view by all users" checkbox.

4. Click "Save New Search" to save the search criteria

5. Enter a name for the filter in the dialogue.

6. Confirm your entry with "OK". To cancel the operation, click "Cancel".

7. In the "Filter templates" window, the search is displayed in the "Global filters" area for all selected users / groups and can be executed with a double-click.

12.4.3 Edit Filter Templates

- Saved filter templates can be edited if necessary.
- For global filter this is only permitted for the administrator.

1. Open the window for the Extended Search.

2. Select the matching search in the dropdown menu "Saved Filter Templates".

3. Make your changes.

4. Click "Save Search" to save the changes.

12.4.4 Delete Filter Templates

– Saved filter templates can be deleted if necessary.

– For global filter this is only permitted for the administrator.

1. Open the Extended Search dialogue.

2. Select the matching search in the dropdown menu "Saved Filter Templates".

3. Click the button "Delete".

12.5 Shortcut Search

With a user-defined keyboard shortcut, users can start the ecoDMS full-text search from any application. Users only need to select the required search term in a software programme (e.g. web browser, email client, Office files, etc.) and then enter a specified shortcut.

12.5.1 Change Shortcut

The shortcut can be created individually for each profile in the Connection Manager. Complete the following steps:

1. Open the Connection Manager.

2. Enter the desired shortcut in the "Shortcut Search" field.

3. Save the profile.

12.5.2 Reset Shortcut

To reset your shortcut, complete the following steps:

1. Open the Connection Manager.

2. Click "Reset" in the shortcut line.

    a) ecoDMS clears your input, so you can enter a new shortcut.

3. Save the profile.

12.5.3 Execute Search Shortcut

1. Select a search term (e.g. on a website, in the enterprise resource planning system, etc.)

2. Type in the ecoDMS shortcut you specified

3. The selected search term populates the full-text search in ecoDMS

12.6 Search options: Searchable Attributes

The system's search bar is in the "Filters / Search" window. You can select the following default attributes and functions in the search bar dropdown area as filters:

- **Comment:** Searches the comment fields

- **Date:** Searches for a specific date

- **DocID:** Searches for a specific DocID

- **Document type:** Searches for a selected document type

- **Changed by:** Displays entries that were last changed by the user within the classification

- **Folder:** Displays results from the selected folder

- **Full text:** Executes a full-text search (c.f. chapter "Full-Text Search")

- **Last change:** Displays entries that were last changed at the selected date within the classification

- **Main folder:** Displays results from the selected main folder

- **Resubmission from:** Displays results that are for resubmission on the selected date

- **Revision:** Displays results with the revision number (e.g. 1.4)

- **Status:** Displays results with the selected status.

- **Advanced search:** Starts the advanced search (c.f. chapter "Advanced Search")

- **User permissions:** Searches for results with the selected permission in the classification

- **Dynamic attributes:** If necessary, custom attributes are also available for searching

12.7 Search for Attributes

The simple search allows a search using individual classification attributes (meta data) [1].

1. Select the attribute you want to search for in the search area, for example, Document Type

2. Select the matching value in the search entry box.

3. The system displays all search results matching the search.
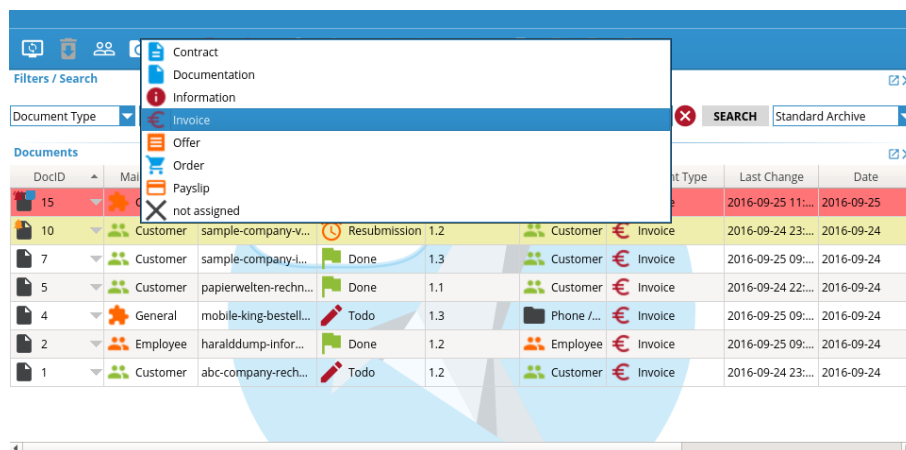
Figure 12.11: Search - Classification Attributes

12.8 Time Bar

There is a time bar at the bottom of ecoDMS Client. Here you can select from which period you want to display documents in the table. This filter refers exclusively to the "date" classification attribute. The following filters are available [1]:

1. <u>Period:</u>
   a) Select the "Start Date" in the left date field of the bar using the arrow keys in the calendar.
   b) Then enter the "End Date" in the right date field of the bar using the arrow keys in the calendar.

2. <u>This week</u>
   a) displays the results from the current week.

3. <u>This month</u>
   a) displays the results from the current month.

4. <u>Last month</u>
   a) displays the results from the previous month.

5. <u>This year</u>
   a) displays the results from the current year.

6. <u>Last year</u>
   a) displays the results from the previous year.

7. <u>Years</u>
   a) Here you can select the year.

8. <u>Months</u>
   a) Here you can select the moth (1-12).
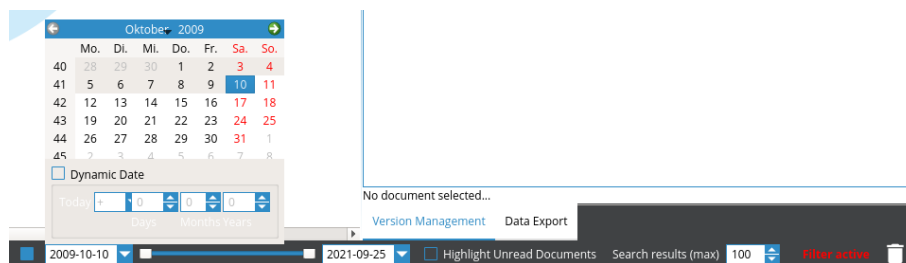
Figure 12.12: Timeline for Documents

12.8.1 Dynamic Date

You can dynamically switch the date in the timeline. In this case the date will daily be switched by the system, according to your settings. To do so, complete the following steps [1]:

1. Activate the Timeline according to the instructions in the previous section to display the calendar.

2. Activate Now, if required for your search, the command "Dynamic data".

3. Enter the dynamic values for the start and / or end date. The system starts out from the current date. The following values are available:
   a) Today +/-
   b) Days
   c) Months
   d) Years

12.8.1.1 Example: Dynamic Date

The dynamic data is automatically switched by the system. For example, if you daily want to view the documents from the last 7 days, complete the following steps:

1. Enter the values "TODAY - 7 days" as the start date in the left calendar of the timeline.

2. Enter the values "Today + 0 Day" as the end date in the right calendar of the timeline.

12.9 Filter by Status

You can filter documents by status in the "Status" window in ecoDMS.

- For example, if you click the "To Do" status, only documents with this status display.

- **You can combine this filter with more filters in any way you like.**

12.10 Filter by Folder

You can filter documents by folder in the "Folders" window in ecoDMS.

–

> **The system has the following default statuses:**
> - **All: Displays all results, regardless of their status, and overrides any filters that may have been set in the status window**
> - **Done: Displays results with the status "Done" set in the classification**
> - **Resubmission: Displays results with the status "Resubmission" set in the classification**
>   - **Expired: Displays results with the status "Resubmission" set in the classification and whose resubmission date has already been reached or has expired**
>   - **Next 7 days: Displays results with the status "Resubmission" set in the classification and whose resubmission date lies within the next 7 days**
> - **To do: Displays results with the status "To Do" set in the classification**

For example, if you click the fictitious main folder "Debtors", all documents assigned to this main folder display. This also includes documents from the associated subfolders.

- **You can combine this filter with more filters in any way you like.**

> - **All folders:** Displays all results, regardless of their folder association, and overrides any filters that may have been set in the folder tree
> - You can also search for folders within the folder tree (refer to the chapter Browse Folder Tree)

12.10.1 Browse Folder Tree

> You can browse the folder tree almost everywhere:
> - "Folder" window
> - Classification dialogue
> - Table view
> - Settings…

The folder tree can contain various values. As an option, you can assign individual keys and keywords to each folder. If you are looking for a folder, you can use the folder name, the key and the keywords as search criteria. To do so, you have the following options:

1. Simply enter the search term anywhere within the folder tree. It can consist of letters and/or numbers.

2. An input field appears in the overview. When you start entering your search term, the system automatically suggests matching documents. The search includes folder names and their keys, as well as keywords.

3. You can continue the folder search with "F3".
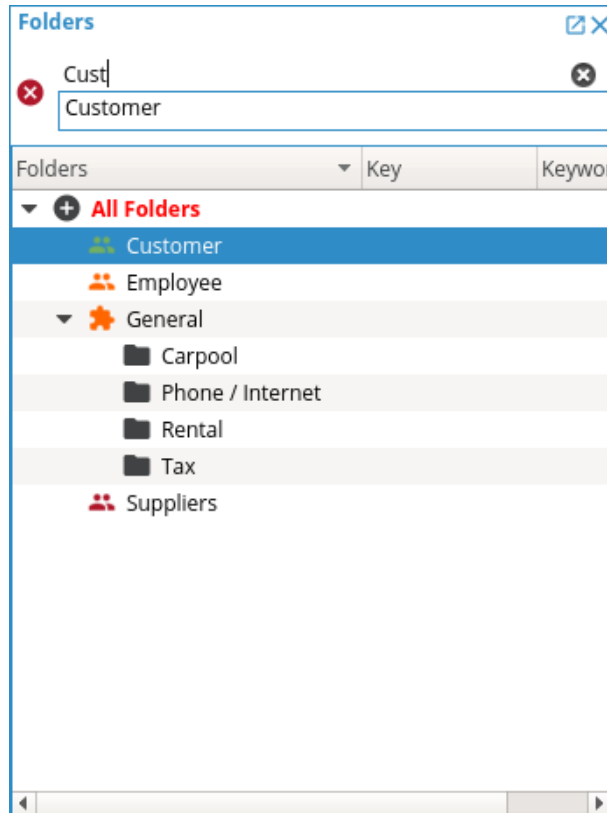
Figure 12.13: Window - Select Folder (Search)

Important Information for Chapter 12

[1] *Die Anzahl max. ausgegebener Dokumente in der Tabelle ist neben den Filteroptionen abhängig von der Einstellung im Bereich "Suchergebnisse (max)" im ecoDMS Client (unten rechts).*

[2] *Diese Funktion setzt zur Ansicht und Nutzung bestimmte System-Berechtigungen voraus.*

12.11 End Search

1. A search is active until the operation is closed with a click on the x-icon in the search line.

2. To reset all active filters, click on the icon with the circle and white bar in the toolbar.

Figure 12.14: Search Line - Stop Active Search (x-icon)
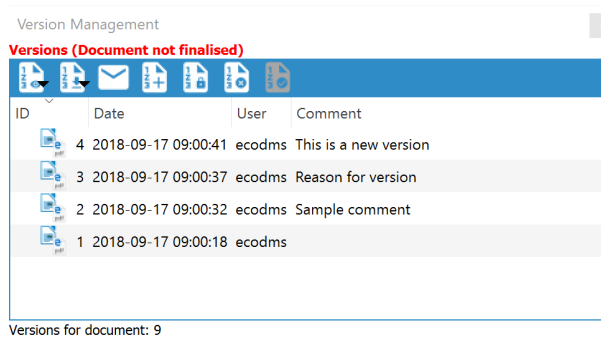
Figure 12.15: Icon - Reset All Active Filters

13 Version Management

ecoDMS allows you to archive any number of document versions. This means that the original persists. As an option you can add a comment to each version.

- To access Version Management (ecoSIMSVERSIONING), you require a system permission.
- Editing, writing a version note and creating further versions is only possible if you have permission to classify this document.
- Please note that you cannot create further versions of a finalised document.
    - A document must be enabled for versioning from the beginning.
- Each version is stored individually within Version Management.
- The latest or finalised version always opens and displays in the preview
- Original files and any available PDF/A files can be stored in the Version Management.
    - PDF/A files are automatically created when archiving PDF, TIFF, JPG and PNG files
    - Moreover, the ecoDMS Office and email plugins generate a PDF in addition to the original file during archiving
    - ecoDMS opens the PDFs (if available) and displays them in the preview
    - The quality and size of a file determine the duration and feasibility of the conversion to the PDF/A format
    - After successful conversion, users can access both the original and the searchable PDF/A through Version Management

Figure 13.1: Window - Version Management

13.1 Create First Version

As a rule, new documents to which you want to apply versioning are stored in ecoDMS via Office Plugins or the usual archiving process using the versioning function. You can also save the first version of a file through Version Management. To manually archive a document "as a versionable document" via Version Management, complete the following steps:

1. Options for opening the "Archive New Versioned Document" function:
    a) Click the "Archive New Versioned Document" icon on the toolbar
    b) Right-click anywhere in the ecoDMS table and select "Archive New Versioned Document..."
    c) Enter the following keyboard shortcut: CTRL + D

2. Select the file.

3. A first version of the selected document is archived and can be classified.
    a) In the table you can always open the latest file version or the version flagged as finalised (if available, this is the PDF/A of a version).

b) Use Version Management to retrieve all original versions, including any available PDF/A files.

Figure 13.2: Icon - Create New Versioned Document
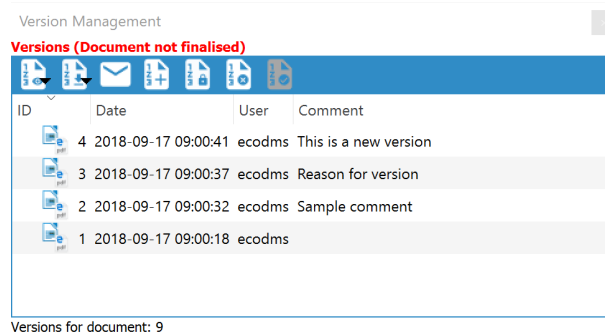
Figure 13.3: Window - Version Management

13.2 Add Version

Besides Office Plugins, you can also add new versions through Version Management [1].

Information You can only add new versions for non-finalised documents. In Version Management, documents must be accessible in a non-finalised version.

1. Select the versioned and non-finalised document in the table.

2. You have the following options for opening the "Add New Version to Document..." function:

    a) In the toolbar or in Version Management, click "Add New Version To Document...".

    b) Right-click the document in the table or any version and select "Add New Version To Document..."

    c) Select any version in the "Version Management" window and enter the following keyboard shortcut: CTRL + G

    d) Drag & drop the document from the file system directly into the Version Management window.

3. Select the document from the file system (except for step "d").

4. The selected document is archived as a new version.

    a) In the table you can always open the latest file version or the version flagged as finalised (if available, this is the PDF/A of a version).

    b) Use Version Management to retrieve all original versions, including any available PDF/A files.

Figure 13.4: Icon - Add New Version To Document ...
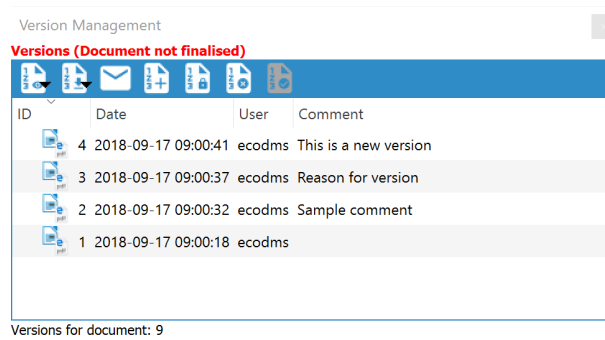
Figure 13.5: Window - Version Management

13.3 Write Comment

You can add comments to each version. You can create comments either directly through the Version Management window or the Classification dialogue (only when archiving via an Office Plugin). To create a comment through Version Management, complete the following steps:

1. Select the version in the Version Management window.

2. Double-click the "Comment" column.

3. Enter a comment.

4. Confirm your entry with "Enter" and click an "empty space".
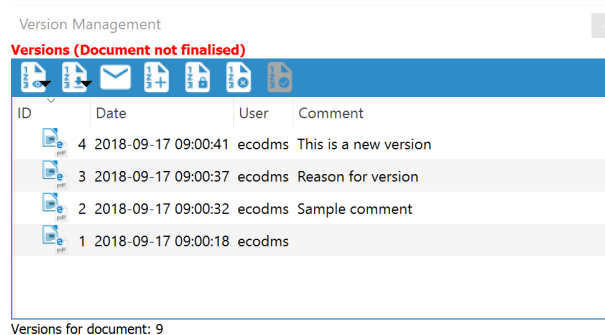
Figure 13.6: Window - Version Management

13.4 Open Version

Users can access files and the individual versions if they have the permission to access the file and Version Management. Depending on the file, the versions are available in the original and in PDF/A format [1].

1. In the table you can always open the latest file version or the version flagged as finalised (if available, this is the PDF/A of a version).

2. Use Version Management to retrieve all original versions, including any available PDF/A files.

Figure 13.7: Version (Open Original / PDF/A) - Icon
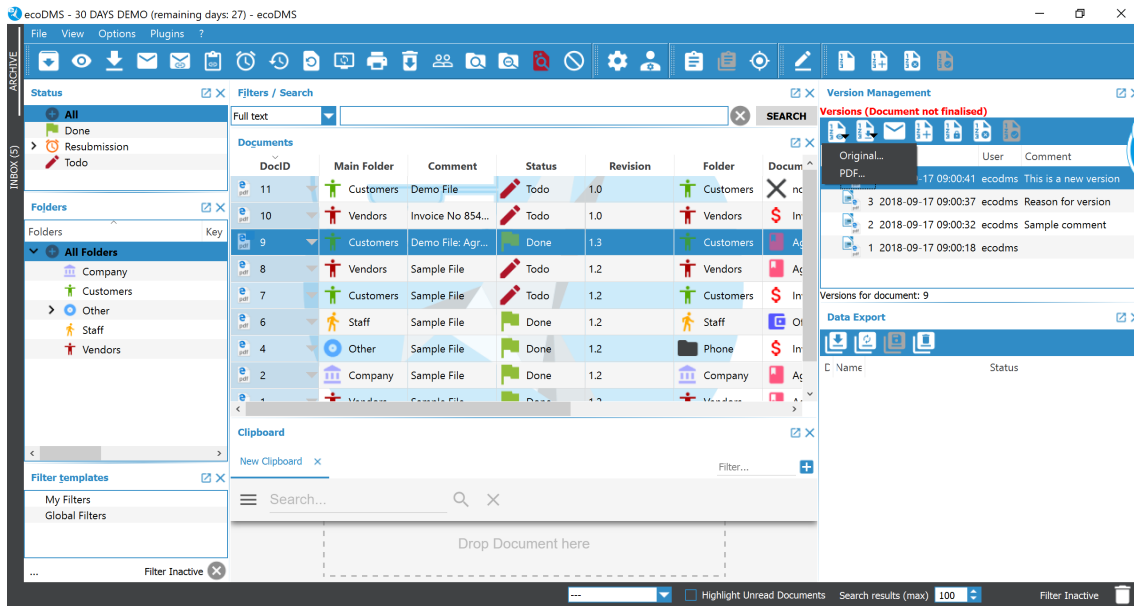
Figure 13.8: Version Management - Open Version

13.4.1 Open PDF

If the archived file could be converted to PDF/A format, you can access the original file as well as the PDF/A document through Version Management.

1. Select the version in the Version Management window.

2. You have the following options for executing the "Open Version - PDF..." function.

   a) Right-click -> Open Version -> PDF...

   b) Long-click the icon "Open Version" -> PDF...

13.4.2 Open Original File

To open the original file, complete the following steps:

1. Select the version in the Version Management window.

2. You have the following options for executing the "Open Version - Original ..." function.

   a) Double-click 1. 2. Right-click -> Open Version -> Original...

   b) Long-click the icon "Open Version" -> Original...

   c) Enter keyboard shortcut: CTRL+ Ö

13.5 Export Version

Users can access files and the individual versions if they have the permission to access the file and Version Management. Depending on the file, the versions are available in the original and in PDF/A format [1].

1. In the table you can always export the latest version of a file or the version flagged as finalised (if available this is the PDF/A of a version).

2. Use Version Management to retrieve all original versions, including any available PDF/A files.

Figure 13.9: Version (Open Original / Export PDF/A) - Icon
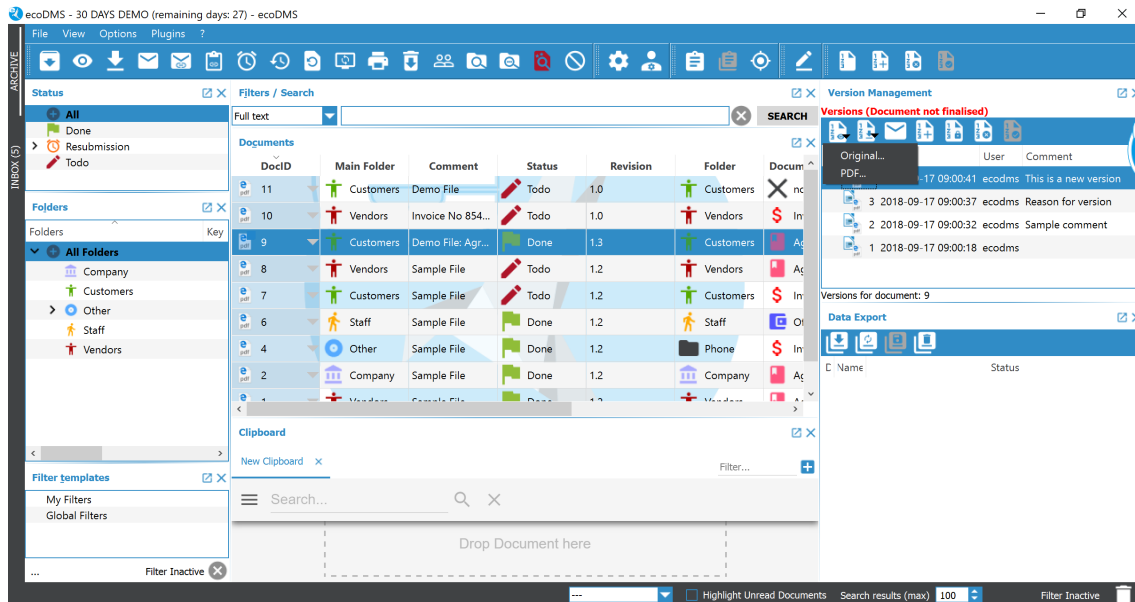
Figure 13.10: Version Management - Export Version

13.5.1 Export PDF

If the archived file could be converted to PDF/A format, you can access the original file as well as the PDF/A document through Version Management.

1. Select the version in the Version Management window.

2. You have the following options for executing the "Export Version - PDF..." function.

   a) Right-click -> Export Version -> PDF...

   b) Long-click the icon "Export Version" -> PDF...

3. Select the target path for the file export.

4. Under Windows a window opens to edit the filename (with other operating systems this step is skipped).

   a) You can overwrite the filename if required.

   b) The file extension cannot be changed. It is automatically added by the system.

   c) Confirm your entry with "OK" or abort the process with "Cancel".

13.5.2 Export Original File

To export the original file, complete the following steps:

1. Select the version in the Version Management window.

2. You have the following options for executing the "Export Version - Original ..." function.

   a) Right-click -> Export Version -> Original...

   b) Long-click the icon "Export Version" -> Original...

   c) Enter keyboard shortcut: CTRL+ O

3. Select the target path for the file export.

4. Under Windows a window opens to edit the filename (with other operating systems this step is skipped).

   a) You can overwrite the filename if required.

   b) The file extension cannot be changed. It is automatically added by the system.

   c) Confirm your entry with "OK" or abort the process with "Cancel".

13.6 Send Email

Note   Depending on the application, you cannot send attachments directly from ecoDMS. This is not an error in ecoDMS. For more information on this topic for Ubuntu, please refer to https://bugs.launchpad.net/ubuntu/+source/xdg-utils/+bug/1019259. As a workaround, the administrator can deposit a script for opening the mail client in the settings dialogue, where it is available for all users (c.f. "Settings" chapter).

Information The filename for the email attachment can only be modified before sending if you have a Windows client.

You can send the PDF/A file (if not available, then the original file) via email. To do so, complete the following steps:

1. Select the version in the Version Management window.

2. You have the following options for executing the "Send Email" function.

   a) Right-click -> Send Email.

   b) Click the "Send Email" icon

   c) Enter keyboard shortcut: CTRL+ ALT + M

3. Under Windows a window opens to edit the filename (with other operating systems this step is skipped).

   a) You can overwrite the filename if required.

   b) The file extension cannot be changed. It is automatically added by the system.

   c) Confirm your entry with "OK" or abort the process with "Cancel".

4. The email window of your default email client opens. The selected version is added as attachment.

Figure 13.11: Version Management - Send Email

13.7 Finalise Version

Versions can be manually finalised by the user. Some documents, such as scanned documents or files that were archived in ecoDMS as non-versioned documents, are automatically finalised after archiving. If a version / document is finalised, no other versions can be added to this document. You cannot undo this status. There are various options to finalise a version [1]:

1. Right-click the document in the "Version Management" window and click "Finalise Version" **or**

2. Click on the icon "Finalise Version" in the "Version Management" window.

Figure 13.12: Icon - Finalise Version
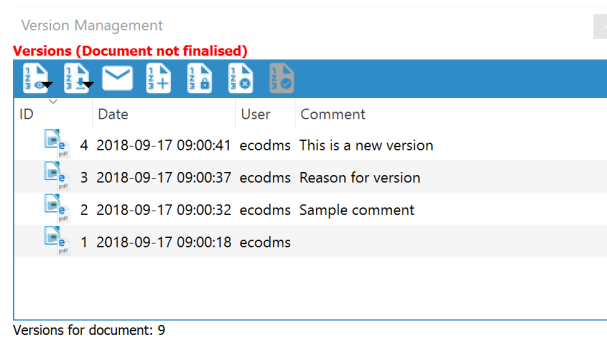
Figure 13.13: Window - Version Management

13.8 Lock Document (Check-Out)

The check-in and check-out process blocks a versioned document for other users while it is being edited. While a document is locked, other users have access to the versions, but they cannot save a new version. To do so, complete the following steps [1]:

1. Select the document in the ecoDMS table

2. Go to the "Version Management" window

3. To lock the document, you have the following options:

    a) Right-click the document in the "Version Management" window and click "Lock Document" **or**

    b) Click on the icon "Lock Document" in the "Version Management" window **or**

    c) Right-click the document in the table and click "Lock Document" **or**

    d) Select Version and then use this keyboard shortcut: Ctrl + Alt + S

Figure 13.14: Icon - Lock Document

13.9 Unlock Document (Check-In)

The check-in and check-out process releases locked, versioned documents after a document was edited. While a document is locked, other users have access to the versions, but they cannot save a new version. To unlock, complete the following steps:

1. Select the document in the ecoDMS table

2. Go to the "Version Management" window

3. To lock the document, you have the following options:

    a) Right-click the document in the "Version Management" window and click "Unlock Document" **or**

    b) Click on the icon "Unlock Document" in the "Version Management" window **or**

    c) Right-click the document in the table and click "Unlock Document" **or**

    d) Select Version and then use this keyboard shortcut: Ctrl + Alt + E

Figure 13.15: Icon - Unlock Document

Figure 13.16: Window - Version Management

Important Information for Chapter 13

[1]   *Diese Funktion setzt zur Ansicht und Nutzung bestimmte System-Berechtigungen voraus.*

14 PDF Editor

- This function requires a license for the full version of ecoDMS but can also be tested in the trial version. This function is not enabled in the Free4Three version.
- Start the PDF Editor from the document preview
- To edit a file in the PDF Editor,
    - there must be a preview of the document in ecoDMS (PDF)
    - the document must be released for classification for the user
    - new versions can be added to the document (document is not finalised)
    - the user is authorised to archive, classify, and create and manage versions of documents

- The PDF editor can be used to add comments and images to archived PDF files (among which are also documents that were converted to PDF format because they were, for example, archived with an Office plugin or were converted to PDF format by the system) that are released for further processing (versionable).

- Start the PDF Editor from the document preview. Non-finalised documents have an "Edit" button The button opens the PDF editor.

- Use the editor interface to "print" notes, stamps, information and images, for example, onto the document.

- As soon as you save the changes, ecoDMS creates a new version, including a preview. The original version persists and any changes are traceable through the individual revisions.
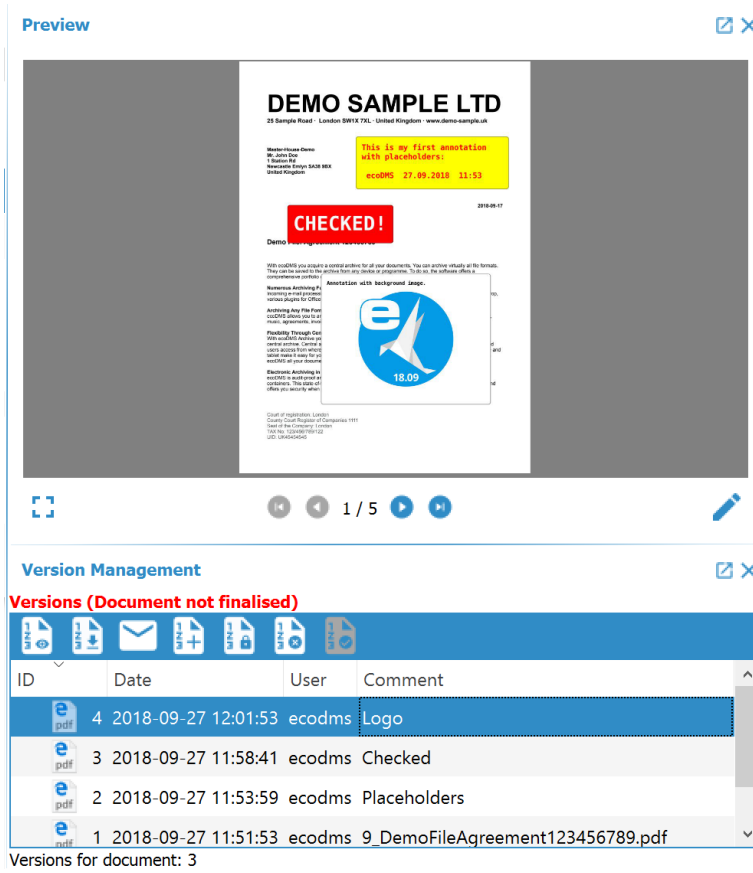
Figure 14.1: PDF with Comments and Versions

14.1 Open PDF Editor

Click the "PDF" icon in the Preview window to open the editor.

Figure 14.2: Edit PDF (Icon)
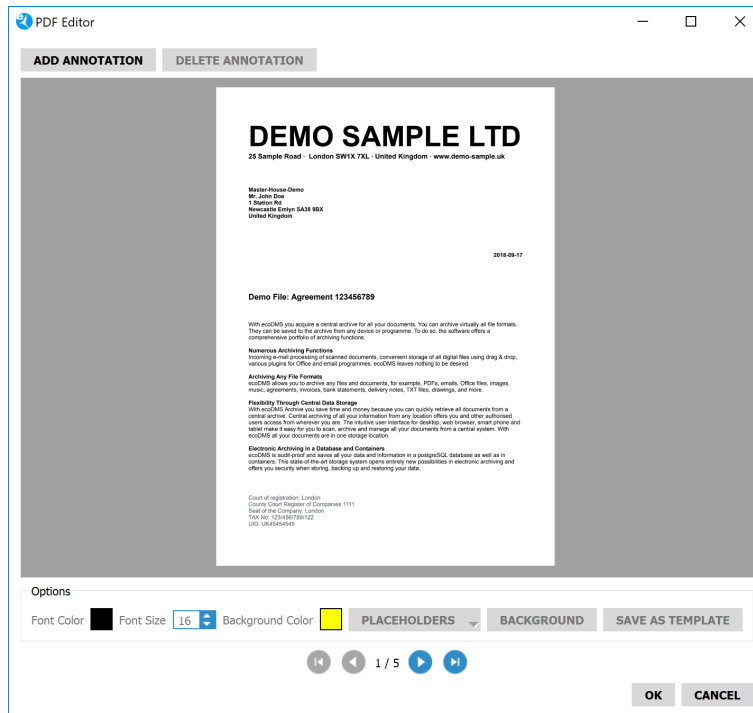
Figure 14.3: PDF Annotator (Blank)

14.2 Create New Annotation

1. Click the "New Annotation" button in the PDF Editor to insert an input box.

   a) You can add any number of annotations.

2. Enter your content.

   a) The size of the box automatically adapts to the content.

   b) You can also resize the box manually by moving the edges of the box.

3. Click "OK" to save the annotations and save the changes in a new document revision. The preview displays your annotations.

   a) Please note that saved annotations cannot be modified or deleted afterwards.

14.2.1 Font Colour

You can modify the font colour of the annotation.

1. Click the colour box in "Options -> Font Colour".

2. Select the colour in the Colour dialogue.

3. Confirm your selection with "OK" or abort the process with "Cancel".

14.2.2 Font Size

You can modify the font size of the annotation.

1. Click the input box in "Options -> Font Colour".

2. Enter the font size or select the font size using the arrow keys in the input box.

14.2.3 Background Colour

You can modify the background colour of the annotation.

1. Click the colour box in "Options -> Background Colour".

2. Select the colour in the colour dialogue.

3. Confirm your selection with "OK" or abort the process with "Cancel".
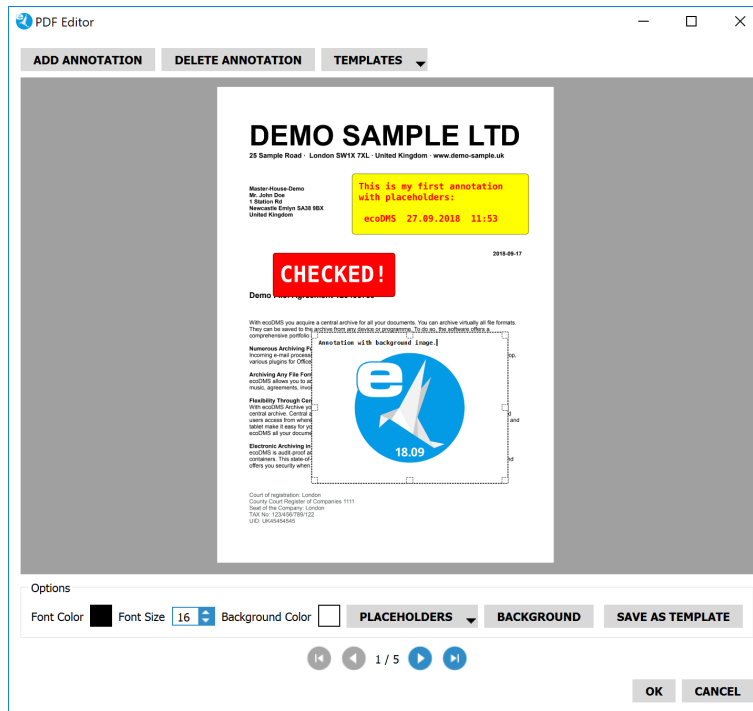
Figure 14.4: PDF Editor with Different Comments

14.3 Delete Annotation

Please note that you can only delete a comment if it is not yet saved and no new version has been created for the PDF.

Until an annotation has been finally saved, you can still remove it. To do so, complete the following steps:

1. Select the unsaved annotation in the PDF Editor

2. Click the "Delete Annotation" button

3. The comment is removed

14.4 Placeholders

You can add placeholders to an annotation. The following placeholders are available:
  – User
  – Date
  – Time

1. Create a new annotation

2. Click the "Placeholder" button

3. Select a placeholder

4. After you save with "OK", ecoDMS automatically fills in the appropriate values and displays them in the preview of this new version
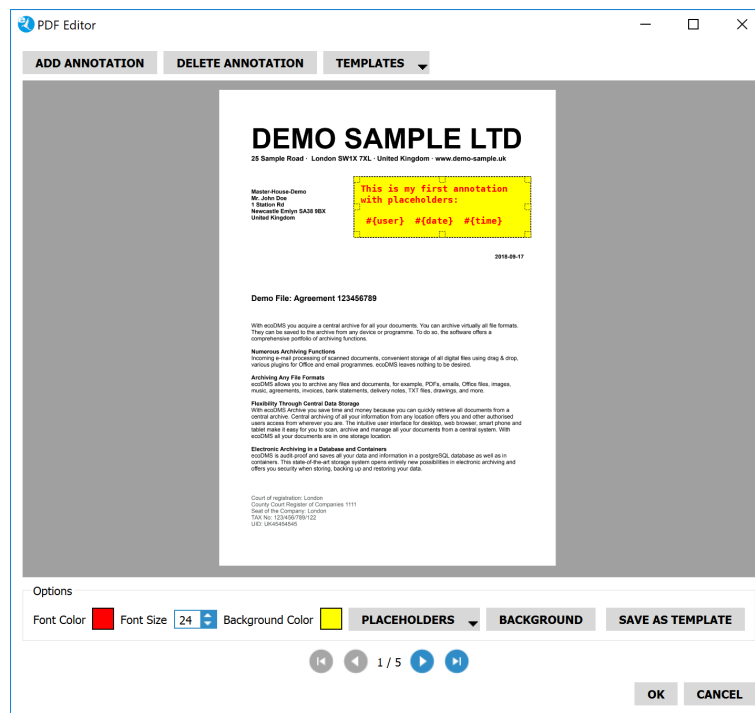
Figure 14.5: PDF Editor: Insert Placeholders
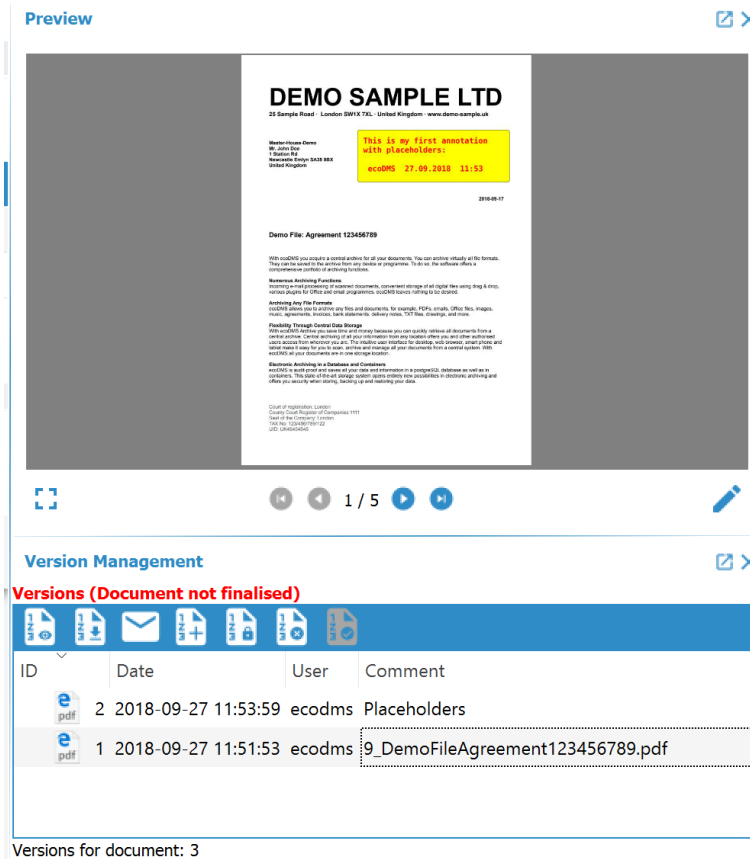
Figure 14.6: PDF With Comments and Populated Placeholders

14.5 Background Image

> The following file types are permitted: .jpg, .jpeg, .png and .bmp

You can add a background to an annotation. This way you can create virtual stamps with a custom image.

1. Create a new annotation

2. Click the "Background image" button

3. Select the image from your drive

4. The file is now in the background of the annotation
   a) You can also resize the field and the background image manually by moving the edges of the box
   b) The background image automatically resizes to fit the size of the field

5. After saving with OK, you can view the annotation in the PDF and in the preview
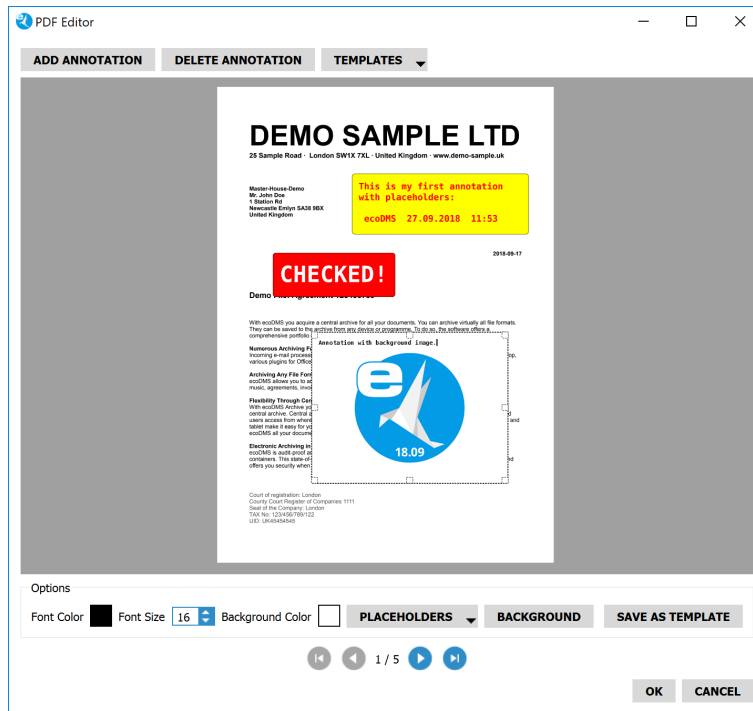
Figure 14.7: PDF Editor: Insert Background Image
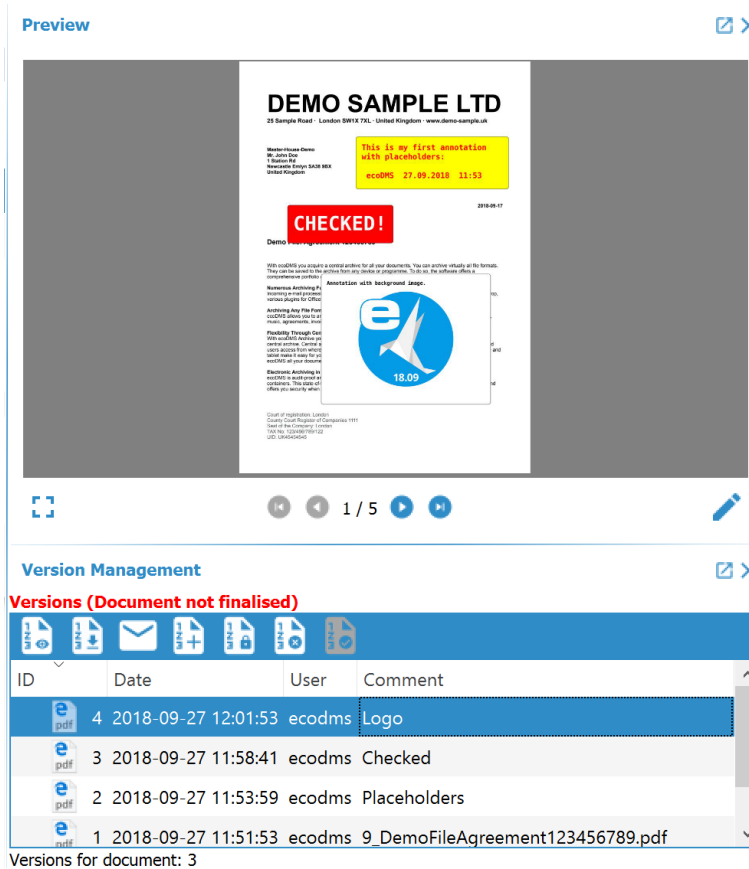
Figure 14.8: PDF with Inserted Image in Comment

14.6 Templates

- All users with access to the PDF Editor can create, view, use and edit templates
- Examples of templates are:
  - Paid on <Date> at <Time> by <User>
  - Reviewed on <Date> at <Time> by <User>
  - Shared on <Date> at <Time> by <User>

You can save recurring annotations as a template for all users with access to the PDF Editor. You can also save virtual stamps, for example.

14.6.1 Save Template

1. Create and fill an annotation with content

2. Click the "Save As Template" button

3. Assign a name to the template and confirm your entry with "OK"

4. The annotation is now available in the "Templates" choice box
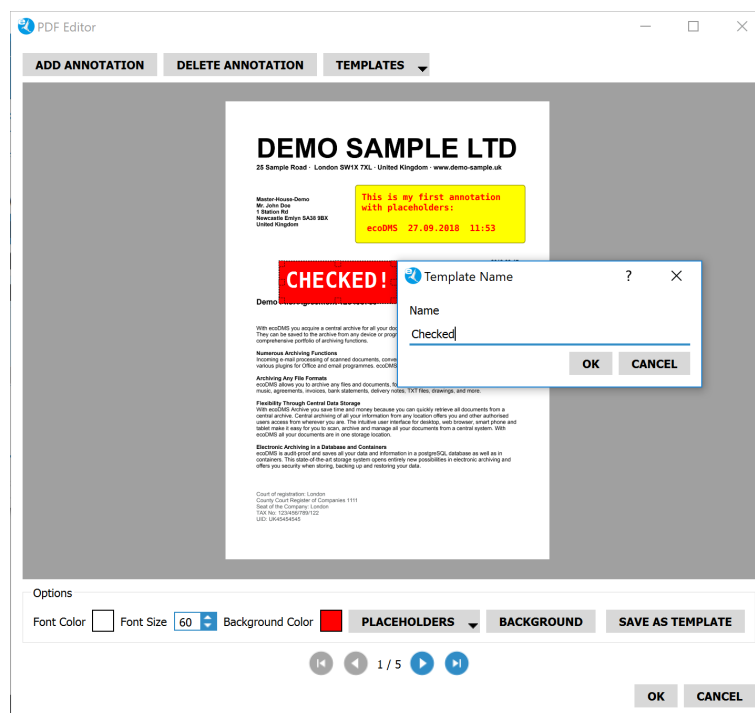
Figure 14.9: Assign Name for a Comment Template
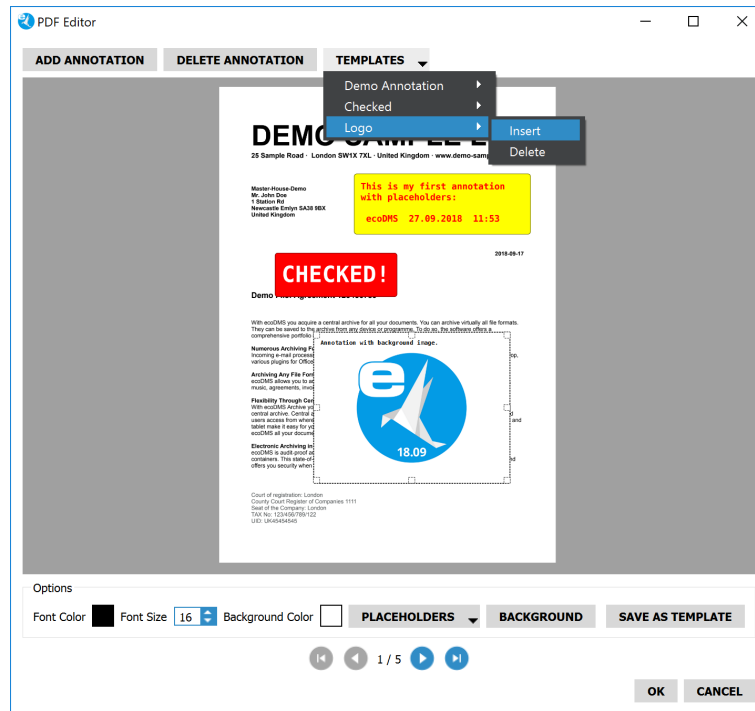
Figure 14.10: Select Templates for Comments

14.6.2 Insert Template

To insert an annotation template in a PDF, complete the following steps:

1. Open the PDF Editor for a document

2. Click the "Templates" button

3. Select a template

4. Click "Insert"

14.6.3 Delete Template

When you execute the delete function, the selected template is immediately deleted for all users. You cannot undo this operation.

To delete an annotation template in the PDF Editor, complete the following steps:

1. Open the PDF Editor for a document

2. Click the "Templates" button

3. Select a template

4. Click "Delete"

15 Clipboard: Collect Documents

- This function requires a license for the full version of ecoDMS but can also be tested in the trial version. This function is not enabled in the Free4Three version.

- Storing files in the clipboard has no effect on existing access permissions or classifications of individual documents.

- You can add up to 200 documents to each clipboard.

- When you open the clipboard, the documents load one after the other. This process may take a while depending on the number and size of the file(s).

Use the Clipboard in ecoDMS to collect archived documents in a kind of virtual folder. Each user can create several clipboards and fill them with documents. You can also share a clipboard with other users / groups. Moreover, you can export the collected documents and send them by email.
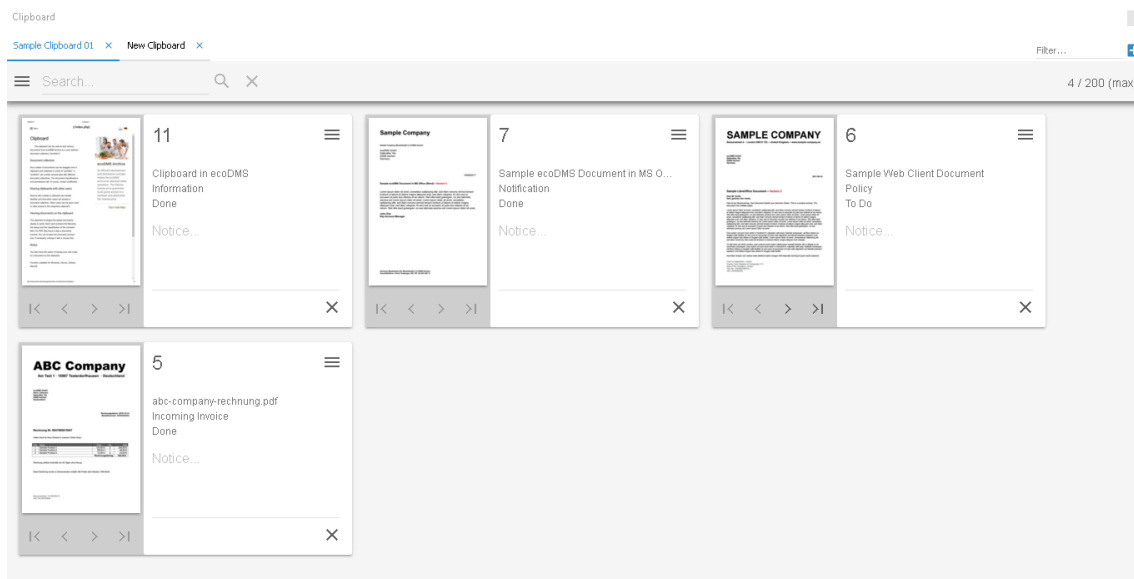
Figure 15.1: Clipboard - Overview
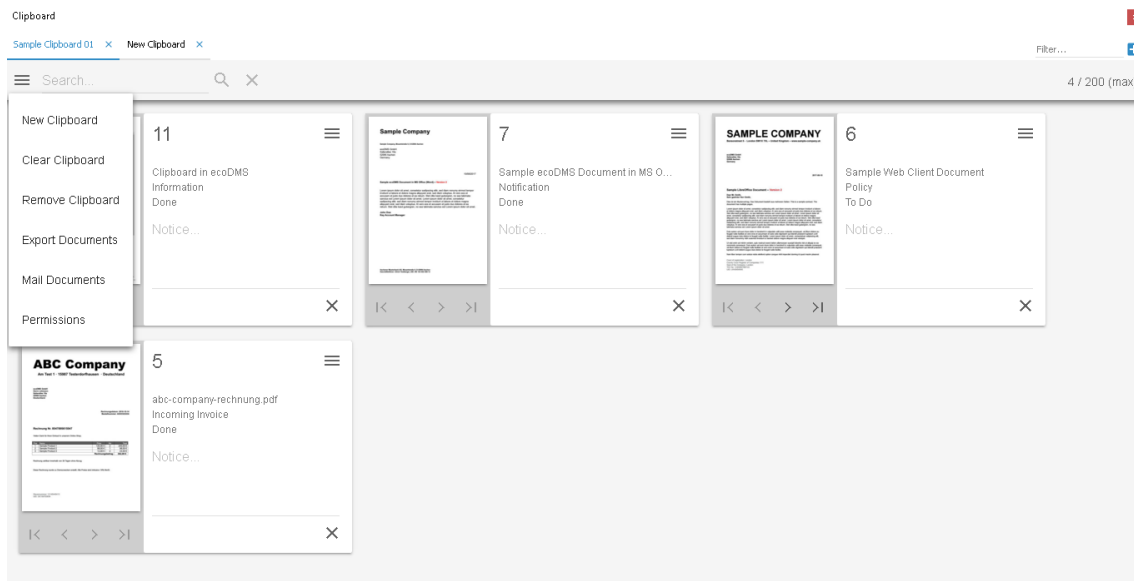
Figure 15.2: Clipboard - Functions in Clipboard Menu
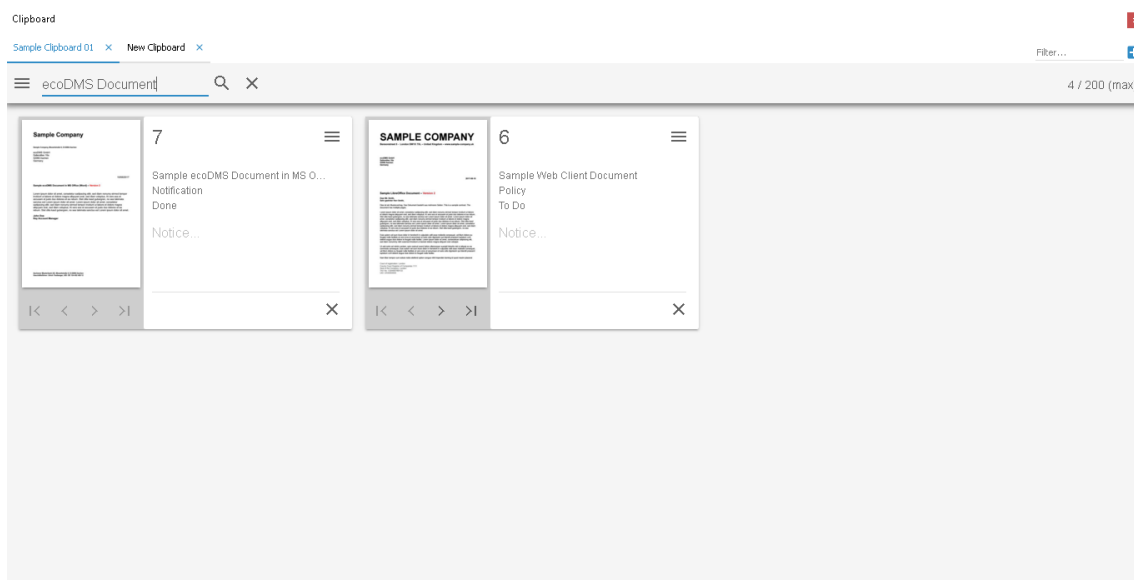
Figure 15.3: Clipboard - Document Search in Clipboard

15.1 Create Clipboard

ecoDMS has a default clipboard. You can add more clipboards in form of tabs. To do so, complete the following steps:

1. Open the clipboard menu in the upper left corner of the clipboard window.

2. Click "New Clipboard".

3. ecoDMS creates the new clipboard, which you can rename individually.
   a) Alternatively, you can create a new clipboard by using the "Plus" icon at the top right of the clipboard window.

15.2 Add Documents

You can add up to 200 documents to each clipboard. To drag one or more documents to a clipboard, complete the following steps:

1. Select the required documents in the ecoDMS table.

2. Drag & drop the documents onto the respective clipboard.

   a) This process does not move the documents within the archive. The DocID, classification and permission of a clipboard file are not changed.

3. The documents are loaded into the clipboard one after the other. This process may take a while depending on the number and size of the file(s).

15.3 Create Clipboard

ecoDMS has a default clipboard. You can add more clipboards.

1. Click the Menu icon on the Clipboard tab -> New Clipboard

   a) Alternatively, you can create a new clipboard by using the "Plus" icon at the top right of the Clipboard window

2. ecoDMS creates another tab with the name "New Clipboard"

3. Double-click the name of the clipboard to rename it

15.4 Empty Clipboard

To remove all documents from a clipboard, complete the following steps

1. Open the clipboard

2. Click the Menu icon on the Clipboard tab -> Empty Clipboard

3. All documents are immediately removed from the selected clipboard

   a) You cannot undo this operation
   b) The files are only removed from the clipboard, not from the archive.

15.5 Remove Clipboard

To delete a clipboard, complete the following steps:

1. Open the clipboard

2. Click the Menu icon on the Clipboard tab -> Remove Clipboard

   a) Alternatively, you can click the X icon next to the clipboard name

3. Confirm the confirmation prompt "Delete Clipboard - Delete Clipboard XXX" with "Yes", or abort the process with "No"

4. The clipboard is irrevocably deleted

   a) You cannot undo this operation

15.6 Send Documents

To send the documents on a Clipboard via email, complete the following steps:

1. Open

> – Depending on the application, you cannot send attachments directly from ecoDMS. This is not an error in ecoDMS. For more information on this topic for Ubuntu, please refer to https://bugs.launchpad.net/ubuntu/+source/xdg-utils/+bug/1019259. As a workaround, the administrator can deposit a script for opening the mail client in the settings dialogue, where it is available for all users (c.f. "Settings" chapter).
> – You can only rename the email attachment before sending if you have a Windows client.

    the clipboard

2. Click the Menu icon on the Clipboard tab -> Send Clipboard

3. If you are using Windows as your operating system, you can now rename the file

    a) To rename a file, simply double-click the name, enter the new name and confirm with "Enter"

    b) Confirm your entries with "OK" to continue, or abort the process with "Cancel"

4. ecoDMS opens the default email programme of your computer and attaches the file in the message window

15.7 Clipboard Permissions

> – Existing document and folder permissions are independent of clipboard permissions.
> – Users can only see the documents for which they have permissions (classification, folder permission).

A clipboard, on the other hand, can be shared with other users. The user who creates a clipboard can assign read and write permissions.

1. Open the clipboard

2. Click the Menu icon on the Clipboard tab -> Permissions

3. In the Permissions dialogue, assign the respective read and write permissions for the clipboard

15.8 Open Document

> – To enlarge the preview of a document in the clipboard, simply click the preview image.
> – To open the file, ecoDMS uses the default application on your computer for the specified file type.

The clipboard displays a separate card view for each document. Each entry contains the DocID, the comment, the document type, the status and an optional note. PDFs also have a preview in which you can scroll through the individual pages. Whether or not a preview is available, you can always open the file from the clipboard. To do so, complete the following steps:

1. Open the menu in the upper right corner of the document on the clipboard -> Open Document

2. ecoDMS opens the document

15.9 Delete Document

To remove a document from the clipboard, complete the following steps:

1. Open the menu in the upper right corner of the document on the clipboard -> Delete Card

    a) Alternatively, you can click the X icon in the lower right corner of the document card

2. The document is immediately removed from the selected clipboard

    a) You cannot undo this operation

    b) The file, in this case, is only removed from the clipboard, not from the archive

15.10 Show Classification

1. If you have the permission, you can use the classification dialogue as usual.
2. Please note that changes to the classification will also have an effect outside the clipboard.
3. This dialogue is where you specify the classifications for all DocIDs in ecoDMS.

To open the classification dialogue for a document from the clipboard, complete the following steps:

1. Open the menu in the upper right corner of the document on the clipboard -> Show Classification

2. ecoDMS opens the classification dialogue for the document

15.11 Search for Clipboard

If there are several clipboards, you can filter them by name.

1. Enter the name of the tab you want to search for in the "Filter" search box

    a) The search box is in the top right corner of the clipboard window

2. Confirm your entry with "Enter"

3. ecoDMS displays the retrieved clipboard tabs

    a) To stop filtering, simply delete the entry

15.12 Search Documents in Clipboard

Use a full-text search to search for documents within a clipboard.

1. Enter the search term in the search box of the clipboard

2. Confirm your entry with "Enter"

3. The matching results are displayed in the clipboard

4. The "X icon" ends the search process in the clipboard

16 Notes

Use the Notes window to append notes to a document. This function resembles the well-known adhesive notes.

- All users who can view the document can edit, add to or delete notes.
- If notes are available for a document, the file is labelled accordingly in ecoDMS.
- The Advanced full-text search includes Classification Attributes and Notes in addition to the contents of documents.
- If you want to search for document content and simultaneously for Classification Attributes and Notes, you must enable the Advanced Full-Text Search.
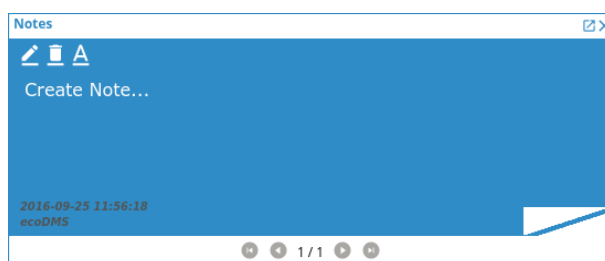
Figure 16.1: Window - Notes

16.1 Create Note

To create a note, complete the following steps:

1. Select the document in the table.

2. Select the function "Create Note". To do this, you have to following options:

   a) Right-click the document - "Create Note" **or**

   b) Click the "Create Note" icon in the toolbar **or**

   c) Enter this shortcut: Ctrl + N

3. You can create the note in the window "Notes".

   a) Any number of notes can be created for a document if you click on the icon "Create Notes" in the window "Notes".

Figure 16.2: Icon - Create Note

16.2 Format Note

The format of a note can be edited. It is then applied to the entire note.

1. Select the document in the ecoDMS table.

2. Select the note in the "Notes" window (use the arrow keys if there are several entries in the "Notes" window).

3. Click the icon "Format Note" in the "Notes" window.

4. Now select the font and the font size.

5. Click "OK" or to cancel the operation, click "Cancel"

A

Figure 16.3: Icon- Format Notes

16.3 Edit Note

1. Select the document in the ecoDMS table.

2. Select the note in the "Notes" window (use the arrow keys if there are several entries in the "Notes" window).

3. Then edit the text.
   a) The note is saved automatically.
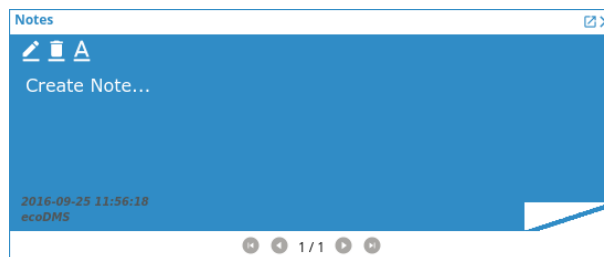
Figure 16.4: Window - Notes

16.4 Delete Note

1. Select the document in the ecoDMS table.

2. Select the note in the "Notes" window (use the arrow keys if there are several entries in the "Notes" window).

3. Click the icon "Delete Note" in the "Notes" window.

4. You have deleted the note.

Figure 16.5: Icon- Delete Note

16.5 Recognise Note

If a note is available for a document, a notes icon is added to the DocID in the ecoDMS table.

Figure 16.6: Icon - Note Information (DocID)

17 Link Documents

> – This function requires a license for the full version of ecoDMS but can also be tested in the trial version. This function is not enabled in the Free4Three version.

You can link various documents with each other in ecoDMS and hold them together in form of a virtual document clip. Basically, you have one main document. You can add further documents to the main document in form of links. ecoDMS then displays the linked documents as fold-out sub-entries in the table view.
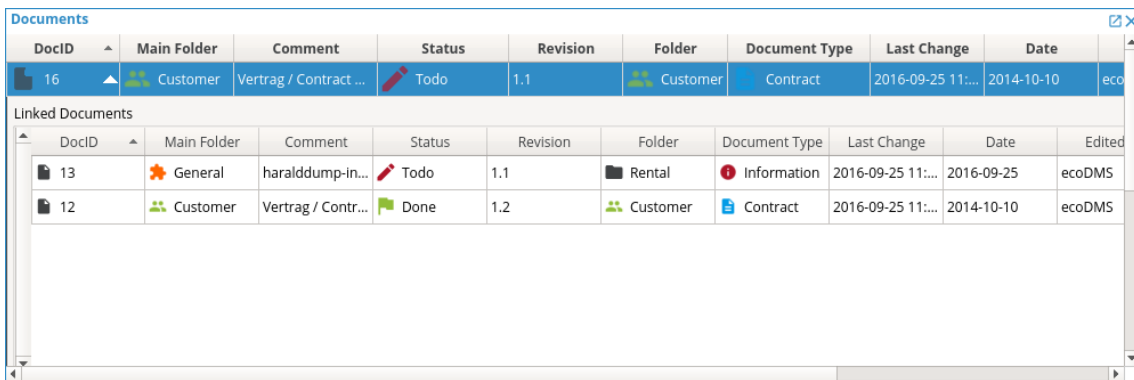
Figure 17.1: Link Overview
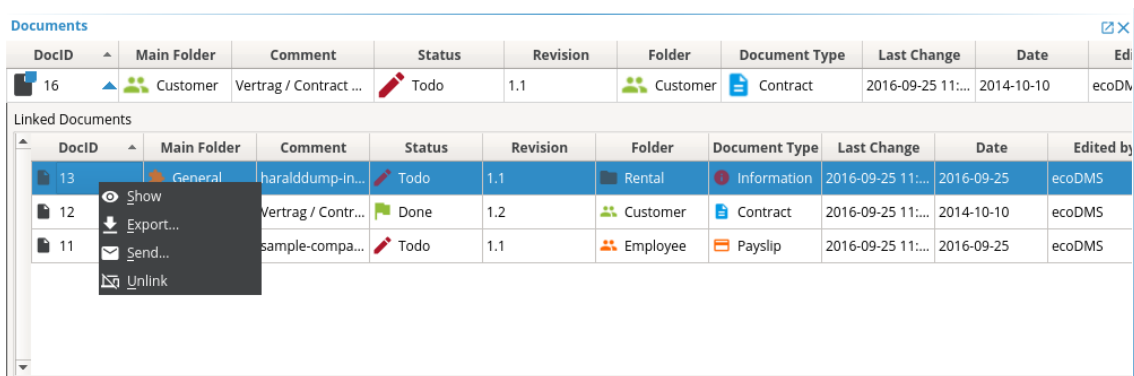
Figure 17.2: Link - Context Menu

17.1 Create Link

To link documents, complete the following steps:

1. Select the "main document"

2. Click the arrow next to the DocID

3. Select the documents you want to link to the main document

a) Press and hold the CTRL key to select several documents

4. Drag and drop the selected documents into the extended "Linked Documents" area of the main document

17.2 Create Link (DocID)

To create a shortcut via DocID, complete the following steps:

1. Select the "main document"

2. Right-click -> Link -> With other document

3. Enter the DocID of the documents you want to link to the main document
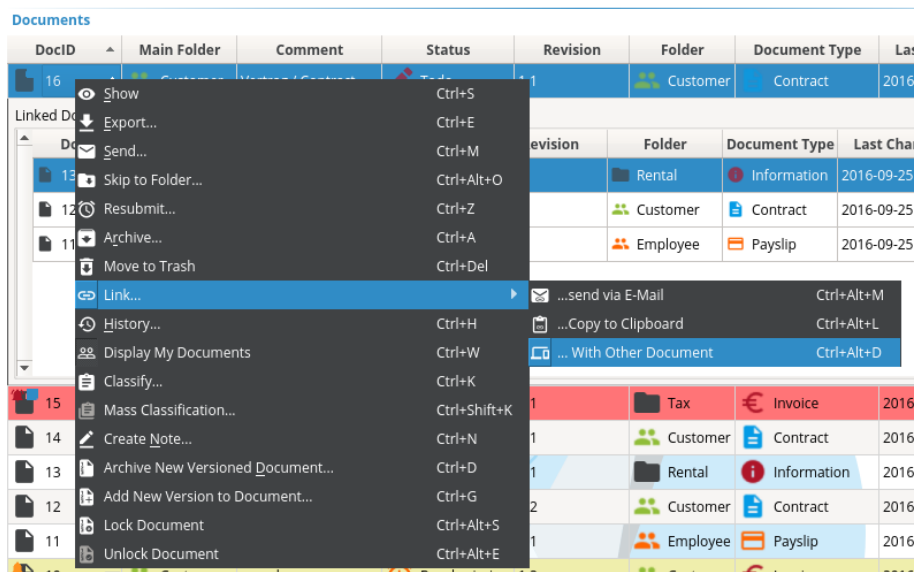
Figure 17.3: Link - With Other Document - Context Menu
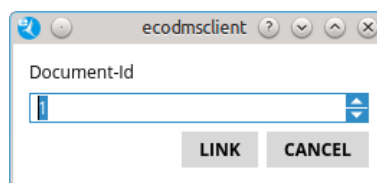
Figure 17.4: Link - With Other Document (DocID)

17.3 Remove Link

To undo the link of a document, complete the following steps:

1. Select the "main document"

2. Expand the linked documents by clicking the arrow next to the DocID

3. Right-click the link you want to delete -> Remove Link

17.4 Open Link

> – To open the file, ecoDMS uses the default application on your computer for the specified file type.

To open the file of a linked document, complete the following steps:

1. Select the "main document"

2. Expand the linked documents by clicking the arrow next to the DocID

3. Select the links

    a) Press and hold the CTRL key to select several documents at once

4. Right-click -> Display

    a) Alternatively, you can open a document by double-clicking the DocID

17.5 Export Link

To export linked documents, complete the following steps:

1. Select the "main document"

2. Expand the linked documents by clicking the arrow next to the DocID

3. Select the links

    a) Press and hold the CTRL key to select several documents at once

4. Right-click -> Export

5. In the dialogue of your file system, select the destination folder for the export

    a) If you want to export all documents as a ZIP file, enable the "Export as ZIP Archive" function

17.6 Send Link

To send linked documents as email attachments, complete the following steps:

1. Select

> – Depending on the application, you cannot send attachments directly from ecoDMS. This is not an error in ecoDMS. For more information on this topic for Ubuntu, please refer to https://bugs.launchpad.net/ubuntu/+source/xdg-utils/+bug/1019259. As a workaround, the administrator can deposit a script for opening the mail client in the settings dialogue, where it is available for all users (c.f. "Settings" chapter).
>
> – You can only rename the email attachment before sending if you have a Windows client.

    the "main document"

2. Expand the linked documents by clicking the arrow next to the DocID

3. Select the links

    a) Press and hold the CTRL key to select several documents at once

4. Right-click -> Send

5. In the dialogue of your file system, select the destination folder for the export
   a) If you want to export all documents as a ZIP file, enable the "Export as ZIP Archive" function

6. If you are using Windows as your operating system, you can now rename the file
   a) To rename a file, simply double-click the name, enter the new name and confirm with "Enter"
   b) Confirm your entries with "OK" to continue, or abort the process with "Cancel"

7. ecoDMS opens the default email programme of your computer and attaches the file in the message window

18 Share Documents

As an option, documents can be shared with externals. To download these documents, the recipient requires a unique download link and the matching password. All required file sharing settings are made in advance by the responsible user in the ecoDMS Desktop Client. The sharing period can also be configured by setting a date. The prerequisite for using this function is enabling remote access in the ecoDMS settings dialogue. The function is available in the trial and the full version of ecoDMS.

18.1 Enable Remote Access

The prerequisite for using this function is to enable the remote access in the ecoDMS settings dialogue. Otherwise an error message displays. The administrator responsible enables remote access through the settings dialogue.

To learn more about the web sett
Access > Remote Access" in the V
the settings.

Figure 18.1: Share Document(s) - Error Message - Enable Remote Access

18.2 Call Function

To provide selected documents for download, complete the following steps:

1. Make sure that remote access is enabled in your Web-Mobile-API settings.

2. Select the documents in the ecoDMS table.

3. Execute the "Share Document(s)" function. To do so, you have the following options:

   a) Click the "Share" icon on the toolbar.

   b) Select the function by right-clicking a selected document.

   c) Select "File > Share > Share Document(s) in the menu.

   d) Enter the keyboard shortcut "CTRL + T"

   e) **Password:** Assign a secure password.

   – The password is required to start the download.

   – ecoDMS recommends you assign a password.

   – The password must have at least 8 characters.

   – This is an optional field, not a mandatory field.

f) **Maximum Download Count:** Enter how often the documents you provide may be downloaded.

> You can restrict the number of possible downloads here. For example, you can specify that the provided documents may be downloaded a maximum of two times. In this case, enter "2" as the value. When the maximum number of downloads has been reached, the files cannot be downloaded again.

g) **Share until:** Here you can enter a relevant description.

> i. ecoDMS recommends you define an end date for sharing the selected files.
> ii. Once this date has expired, the documents can no longer be downloaded.

h) **Comment:** An dieser Stelle können Sie eine passende Beschreibung erfassen.

> i. Entering a comment is optional.
> ii. A comment may be a note about the purpose of the download (e.g. Quarterly figures for the accountant).

i) **OK**: Save and copy the download link to the clipboard

> i. As soon as you click the OK button, ecoDMS creates the associated download link and copies the link to the clipboard.
> ii. You can no longer make changes after you click OK. If you want to make changes, you must delete the download (see "Delete External Downloads") and create a new download.

Figure 18.2: Share Document(s) - Settings dialogue

1. **Password:** Assign a secure password.
   a) The password is required to start the download.
   b) ecoDMS recommends you assign a password.

    c) The password must have at least 8 characters.

    d) This is an optional field, not a mandatory field.

2. **Maximum Download Count:** Enter how often the documents you provide may be downloaded.

    a) You can restrict the number of possible downloads here. For example, you can specify that the provided documents may be downloaded a maximum of two times. In this case, enter "2" as the value. When the maximum number of downloads has been reached, the files cannot be downloaded again.

3. **Share until:** Here you can enter a relevant description.

    a) ecoDMS recommends you define an end date for sharing the selected files.

    b) Once this date has expired, the documents can no longer be downloaded.

4. **Comment:** An dieser Stelle können Sie eine passende Beschreibung erfassen.

    a) Entering a comment is optional.

    b) A comment may be a note about the purpose of the download (e.g. Quarterly figures for the accountant).

5. **OK**: Save and copy the download link to the clipboard

    a) As soon as you click the OK button, ecoDMS creates the associated download link and copies the link to the clipboard.

    b) You can no longer make changes after you click OK. If you want to make changes, you must delete the download (see "Delete External Downloads") and create a new download.
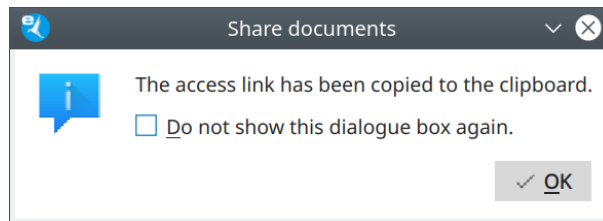
Figure 18.3: Share Document(s) - Information - Copied Link to Clipboard

18.3 Start Download

To start downloading the shared documents, recipients need the generated download link. Moreover, the ecoDMS server must be accessible and remote access must be enabled.

1. Copy the download link to the web browser.

2. If a password was assigned, ecoDMS requests the recipient to enter this password.

    a) Enter the password in the input box.

3. The download starts automatically.

    a) Click the "Download Cloud" to start downloading manually.

    b) If there are several files for download, these are zipped to a ZIP file while retaining their original format.

    c) A single file is not zipped for download.

    d) The file formats in the ecoDMS table are used for download.
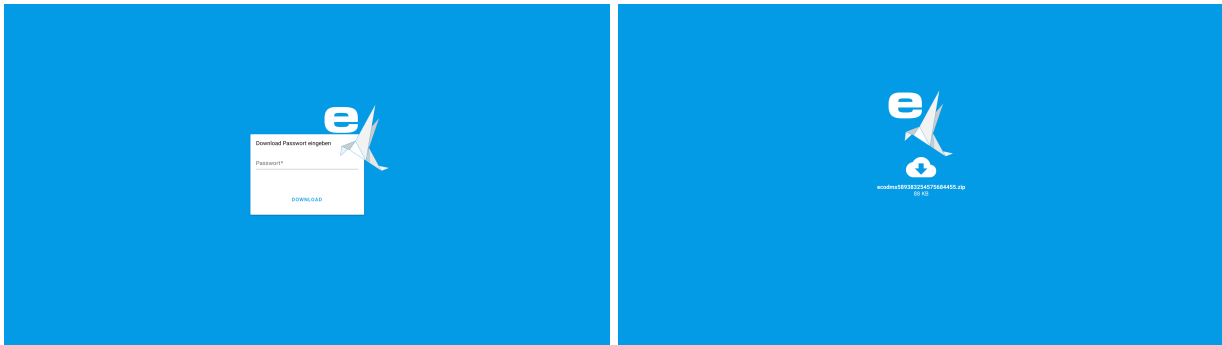
Figure 18.4: Share Document(s) - Download

18.4 Shared Documents Overview

ecoDMS has an overview of shared documents and their respective settings and downloads in form of a list. The list shows all information in a table. You cannot modify the list entries. If you need to modify any settings, you must delete the entry from the list (Actions column) and re-create the entry with the "Share Document(s)" function.

1. Open the list by selecting "Menu > Share > Shared Documents".

Figure 18.5: Share Document(s) - Overview of Shared Documents

18.5 Delete Downloads

You can stop external sharing of documents. To do so, you must delete the respective download job from the "Overview of Shared Documents". To do so, complete the following steps:

1. 1. Open the "Overview of Shared Documents" by selecting "Menu > Share > Shared Documents".

2. Click the "X" icon in the "Actions" column.

3. Confirm the delete prompt with "Yes".

4. The download link is now irrevocably removed.

18.6 Retrieve Download Link

You can retrieve the respective download link in the dialog for the Overview of Shared Documents. To do so, complete the following steps:

1. 1. Open the "Overview of Shared Documents" by selecting "Menu > Share > Shared Documents".

2. In the "Actions" column, click the cloud icon.

3. The download link is now automatically copied to the clipboard.

19 History

ecoDMS uses a history to document modifications related to the classification of a document. All processing and archiving steps are thus automatically logged and can be reproduced at any time. In addition, ecoDMS logs specified user actions [1]:

19.1 Show History

To display the document history, complete the following steps:

1. Select the document in the ecoDMS table.

2. Select the "History" function. To do this, you have the following options:

   a) Right-click -> History

   b) Click the "History" icon.

   c) Menu -> File -> History

   d) Keyboard shortcut: CTRL + H

3. The history of the selected document is displayed.

Figure 19.1: Icon - History

Figure 19.2: History - Example

19.2 Logging

The following actions are logged:

– All changes of the classification values (e.g. document type, folders etc.)

- – All changes to the permissions within the classification

- – Archived document

- – Viewed document

- – Exported document

- – Sent document via Email

- – Printed document

- – Moved document to archive

- – Created new version

- – Finalised document

- – Deleted document

- – Access via API

- – Moved document to Trash

- – Restored document from Trash

Important Information for Chapter 19

[1]   *Diese Funktion setzt zur Ansicht und Nutzung bestimmte System-Berechtigungen voraus.*

20 Erase Documents

ecoDMS has a multi-step data erasure concept which complies with the legal requirements for "data protection" and the "Generally Accepted Principles of Computerised Accounting Systems in Germany". This allows you to move documents to a virtual Trash can, from where they are erased from the archive subject to their retention periods. The irrevocable erasure of a file means that all text information in the document history and classification is anonymised. In addition, the actual document is replaced by an erasure log containing a justification. Access to the delete log and the "classification remains" is only granted to super administrators with the system permission "View all documents regardless of their permission".
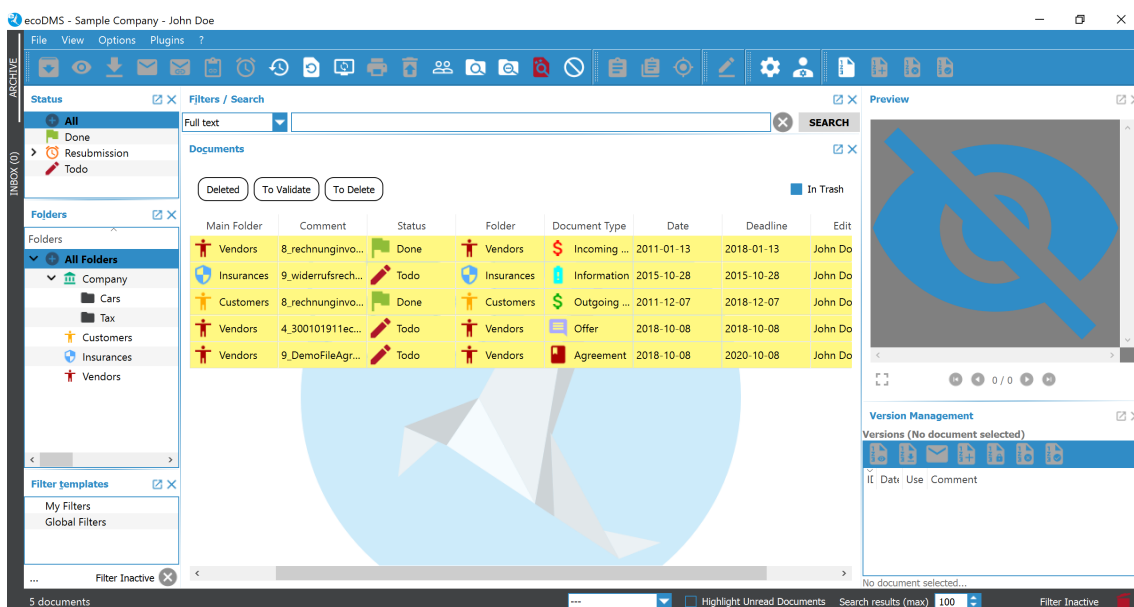
Figure 20.1: Trash: Document Overview

20.1 Trash

- Documents can be moved to the Trash can by all users with the respective classification permission.
- The search and filter functions are also available in the Trash.
- Classification is not possible in the Trash.
  - To edit the classification, the document would need to be restored from the Trash with the restore function.

Use the "Move to Trash" function to remove documents that are no longer required from the main view (table). In this process the files are not deleted but stored in a virtual Trash can.

20.1.1 Open Trash

At the bottom of ecoDMS Client, there is a text entry box for search results in the right-hand corner. In this area, you can switch between the default view and the Trash view.

1. Click the blue Trash icon.

2. The Trash opens.

a) The Trash is displayed in red. The Trash view is enabled so that only the documents from the Trash are visible.

Figure 20.2: Icon - Trash (Open / Close)

20.1.2 Exit Trash

At the bottom of ecoDMS Client, there is a text entry box for search results in the right-hand corner. In this area, you can switch between the default view and the Trash view.

1. Click the red Trash icon.

2. The Trash closed.

   a) The Trash is displayed in blue. The default view is enabled again.

Figure 20.3: Icon - Trash (Open / Close)

20.1.3 Move Documents to Trash

To move one or several documents / classifications to the Trash, you have different options. You must, however, have a permission to classify these files.

> **Information about deleting folders:** If documents are moved to the trash, the classification and the folder assignment remain. Should it be necessary to delete the associated folder, all assigned documents in the main view and in the trash must be reclassified to a different folder. To reclassify the documents, you must restore the affected documents first. Reclassifying documents in the trash can is not possible.

To do so, complete the following steps:

1. Select the document(s) in the ecoDMS table.

2. Select the function "Move to Trash". To do this, you have the following options:

   a) Right-click the document - "Move to Trash" **or**

   b) Click the "Move to Trash" icon in the toolbar **or**

   c) Enter this shortcut: Ctrl + Del

   d) Move the document(s) via Drag and Drop on the Trash icon at the right bottom of the client.

Figure 20.4: Icon - Move to Trash

20.1.4 Restore

Documents in the Trash can be restored. You must, however, have a permission to classify these files.

1. Change to the Trash view by clicking the Trash icon at the bottom of the client.

a) The icon shows that only documents from the Trash are visible.

2. Select the document(s) in the ecoDMS table.

3. Select the function "Restore". To do this, you have the following options:

   a) Right-click the document - "Restore" **or**

   b) Click the "Restore" icon in the toolbar **or**

   c) Enter this shortcut: Ctrl + Ins

Figure 20.5: Icon - Move to Trash

20.2 Erase Documents

ecoDMS has an erasure function which allows authorised users with the "The user may erase documents" permission to finally remove documents from the archive with the integrated data erasure policy. Depending on document type and setting, the documents run through multiple steps. In the trash can these steps are arranged in the following categories (tabs):

– Erased

– For review

– For erasure

Data Erasure Policy Steps

1. **Trash**
   a) Documents that are no longer required can be moved to the trash, thus removing them from the main view.
      i. Every user with the respective classification permission for those documents can execute this procedure.

2. **Consider Retention Period**
   a) A retention period saved with the document prevents the erasure of this document until it has expired.
   b) A retention period can be assigned to each document type.

3. **Review**
   a) Documents, whose retention period has expired and whose document type requires a review, are submitted to authorised users before they are erased.
      i. ecoDMS displays these documents on the "For Review" tab in the trash can.
   b) There you can extend the retention period for one or more documents.

4. **Release Documents for Erasure**
   a) Following successful review, authorised users can release one or more documents for erasure.
   b) After release, ecoDMS displays the documents on the "For Erasure" tab in the trash can.

5. **For Erasure**
   a) ecoDMS displays documents that can be irrevocably removed from the archive on the "For Erasure" tab in the trash can.
   b) Execute the "Erasure" function to irrevocably erase one or more documents.
   c) The erasure process requires the creation of an erasure log.

6. **Erased**
   a) The erasure of a file means that all text information in the document history is anonymised.
   b) In addition, the actual document is replaced by an erasure log containing a justification.
      i. Access to the delete log and the "classification remains" is only granted to super administrators with the system permission "View all documents regardless of their permission".
      ii. Other users cannot see deleted entries.

20.2.1 Review & Release

For each document type you can enable a retention period and a review prior to erasure. ecoDMS displays documents with this setting in the "For Review" tab in the trash can after the retention period has expired.

Tip: By default, the system exclusively displays documents that users moved to the trash can. "Expired" documents, however, can also be located in the main view. These can also be displayed on the "For Review" tab. To do so, disable the "In the Trash" checkbox in the trash can. ecoDMS then displays the "expired" documents from the main view and from the trash can.

20.2.1.1 Review & Edit

To review and extend the retention period, complete the following steps:

1. Select one or more documents on the "For Review" tab in the trash can.

2. Right-click and select -> Retention Periods.

3. A dialogue displays the DocID, the review date, the retention period and the review settings.
   a) Click the DocID to display details on the retention period.

4. If you do not need to make modifications, you can simply close the dialogue.
   a) Otherwise you can modify the retention period for the selected DocIDs in this dialogue.
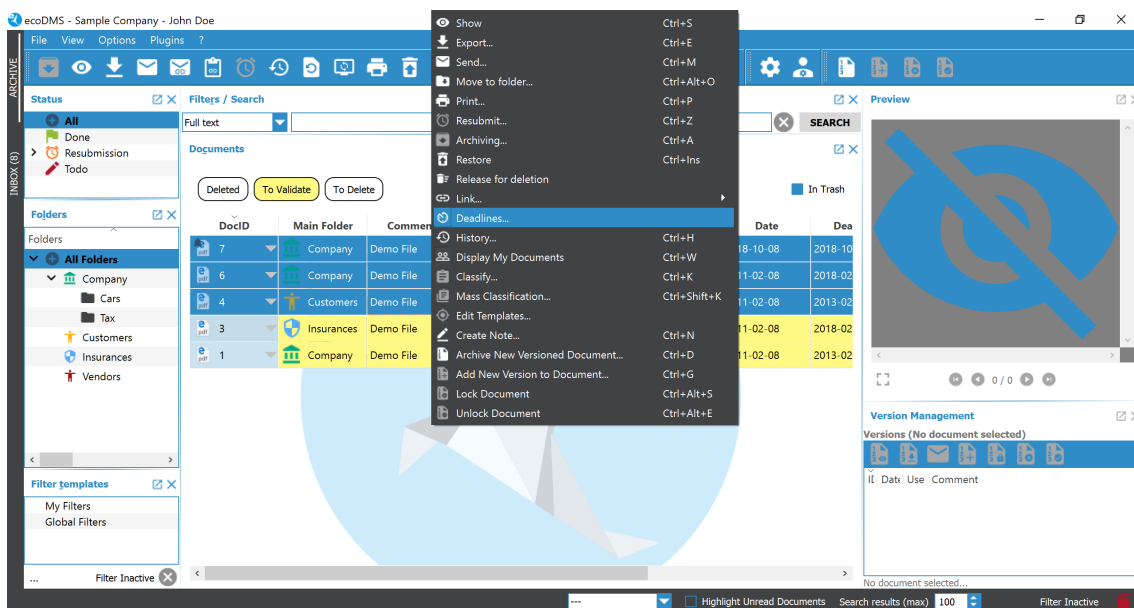
Figure 20.6: Trash: Documents for Review in "Retention Periods"
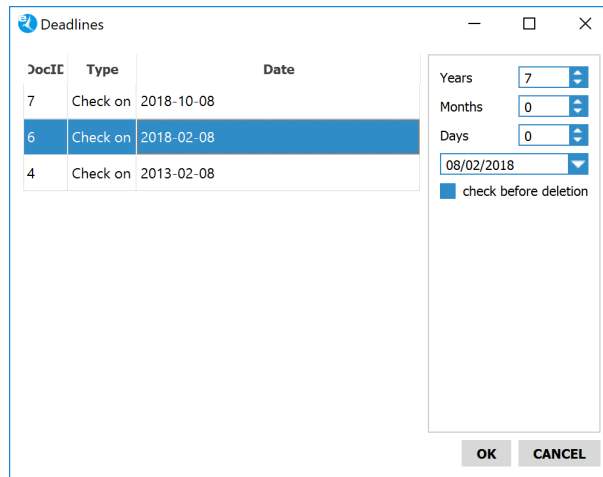
Figure 20.7: Trash: Check and Modify Retention Periods

20.2.1.2 Release

After reviewing the documents for erasure, you can release them for erasure. To do so, complete the following steps:

1. Select one or more documents on the "For Review" tab in the trash can.

2. Right-click and select -> Release for Erasure

3. ecoDMS removes the documents from the "For Review" tab and displays them on the "For Erasure" tab.
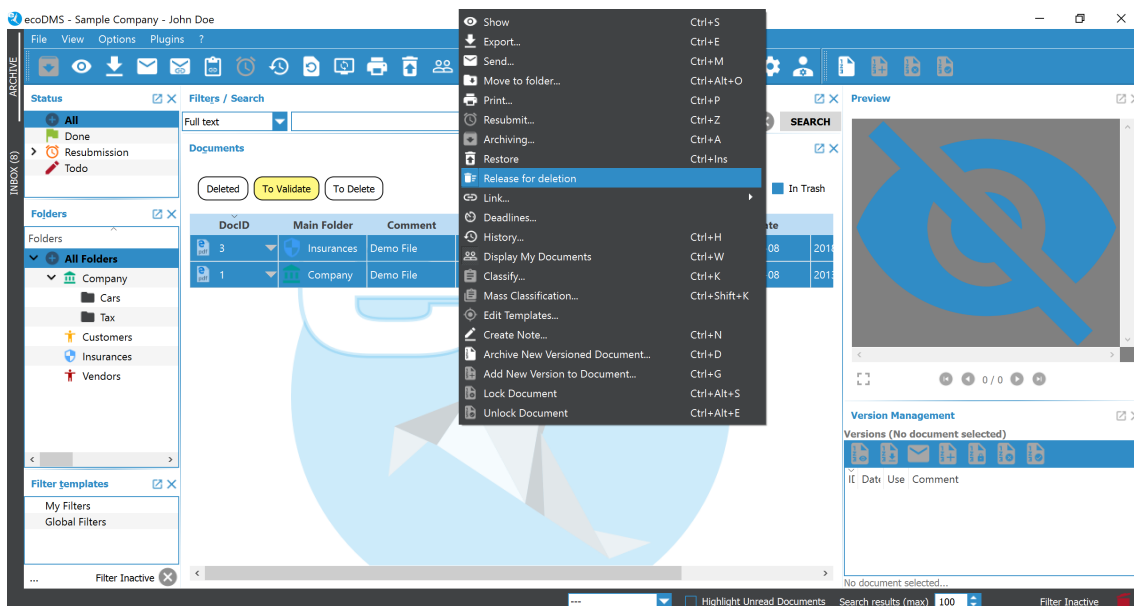
Figure 20.8: Trash: Release Documents For Erasure

20.2.2 Erasure
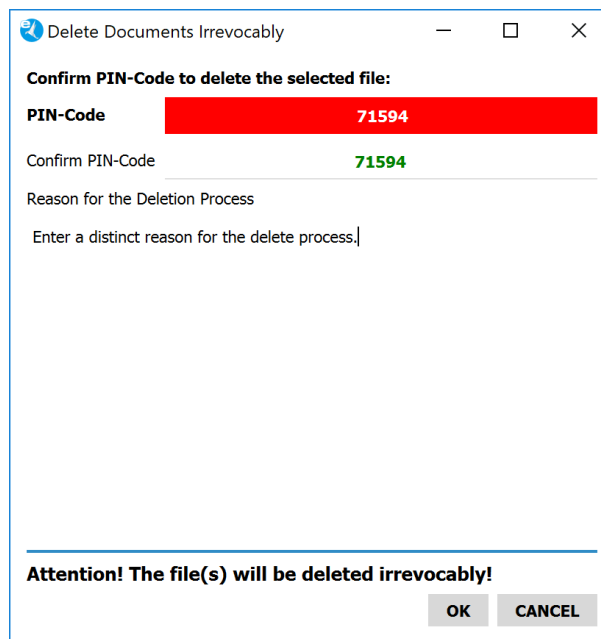
The documents released for erasure are listed on the "For Erasure" tab in the trash can. From here you can erase one or more documents from the archive and ecoDMS replaces the erased documents with an erasure log. To do so, complete the following steps:

1. Select one or more documents on the "For Erasure" tab in the trash can.

2. Right-click -> Erasure.

3. A dialogue displays "Erase Document Irrevocably".
   a) **PIN-CODE:** Enter the pin code.
   b) **Confirm PIN-CODE:** Enter the code highlighted in red.
   c) **Reason for deletion:** Enter a distinct justification for the delete process.

> This information is then displayed together with the erasure date, the erasure time and the user in an erasure log in place of the document.

   d) Confirm the erasure process by pressing "OK" or abort the process by pressing "Cancel".

Figure 20.9: Trash: Create Erasure Log

4. ecoDMS removes the selected documents from the "For Erasure" tab and moves them to the "Erased" tab, which can be viewed by authorised users.

> Only users with the system permission "The user may view all documents regardless of their permission" (ecoSIMSALLDOCS) have access to the erasure logs and the remains of the associated classification. For all other users these entries are no longer visible.
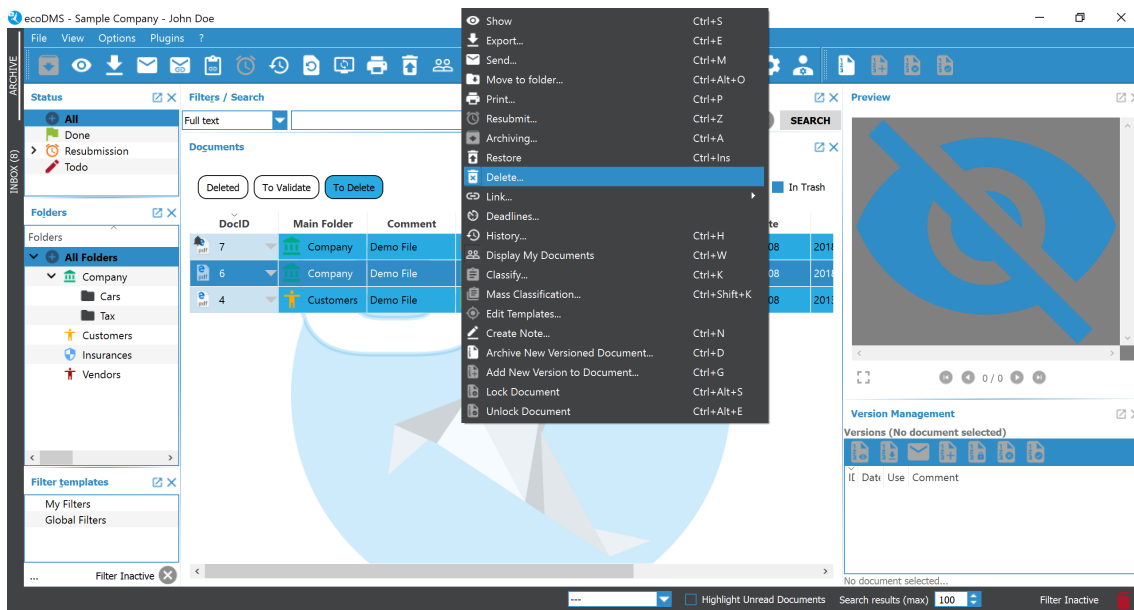
Figure 20.10: Trash: Erase Documents (Select Function)
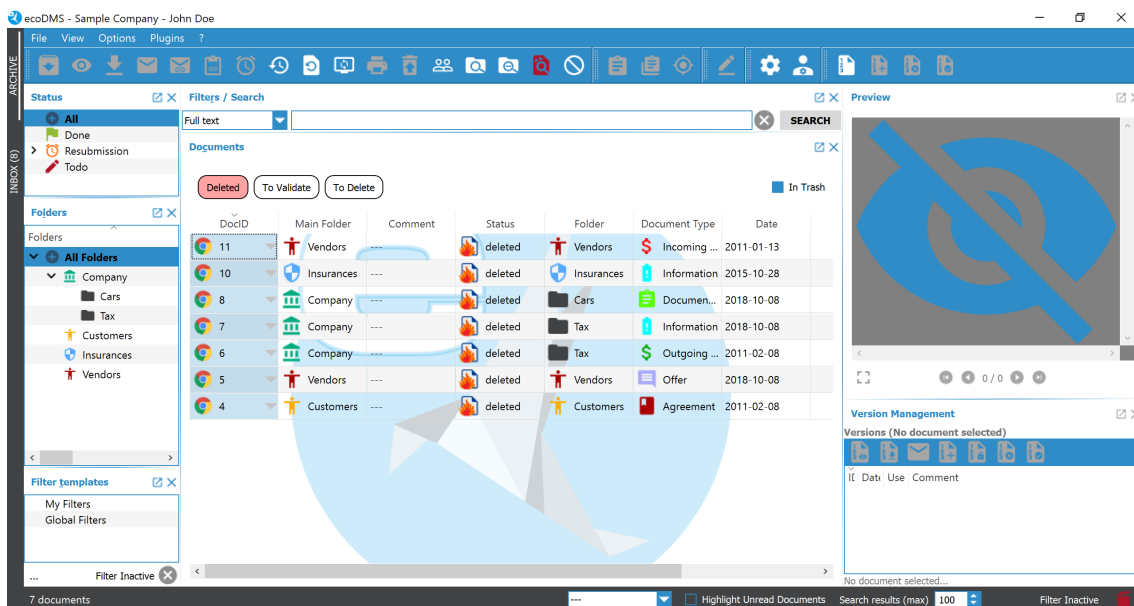
Figure 20.11: Trash: Erased Documents

Figure 20.12: Icon - Right-Click - Erase Document Irrevocably

20.2.3 View Erasure Log

Mit dem unwiderruflichen Löschen einer Datei wird diese durch das erstellte Löschprotokoll ersetzt. Innerhalb der Klassifizierung und Historie werden zudem jegliche Textinformationen anonymisiert. Das Bemerkungsfeld im Klassifizierungsdialog ist beispielsweise ein solches Textfeld. Only users with the system permission "The user may view all documents regardless of their permission" (ecoSIMSALLDOCS) have access to the entries in the "Erased" tab of the trash can.

To view an erasure log, complete the following steps:

1. Select the document you want to view on the "Erased" tab of the trash can.

2. Execute the "Display" function,

   a) for example by double-clicking the Doc ID or right-clicking and selecting -> Display.

3. The erasure log is an HTML page. It opens in your default internet browser.

Figure 20.13: Trash: Erasure Log

21 Internal Links for External Call

The link function allows you to send and copy document and folder links. Use this function to open ecoDMS documents and folders from external programmes, for example.

- If you want a link to display as HTTP hyperlink, your administrator must adjust the necessary settings in the settings dialogue. Otherwise links are always displayed as ecoDMS URL.
- A prerequisite for opening the link is access to ecoDMS or to ecoDMS Server, and permissions for the document / the folder.
- To open or display links, the user must be connected via the Connection Manager.

21.1 Copy Document link to the Clipboard

You can paste the link to any position (for example in your Internet Browser or in other external applications). When you click the link, the document opens.

To copy a document link to the Clipboard, complete the following steps [1]:

1. Select the document in the ecoDMS table.

2. Select the function "Link... Copy to Clipboard". To do this, you have the following options:

   a) Right-click the document - "Link... Copy to Clipboard" **or**

   b) Click the "Copy to Clipboard" icon in the toolbar **or**

   c) Enter this shortcut: Ctrl + Alt + L

Figure 21.1: Icon - Link... Copy to Clipboard

21.2 Send Document Link via E-Mail

A mail window of your standard mail client opens. The selected documents are paste as text of the mail. When you click the link, the document opens.

To send a document link via E-Mail, complete the following steps [1]:

1. Select the document in the ecoDMS table.

2. Select the function "Link... Send via E-Mail". To do this, you have the following options:

   a) Right-click the document - "Link... Send via E-Mail" **or**

b) Click the "Send via E-Mail" icon in the toolbar **or**

c) Enter this shortcut: Ctrl + Alt + M

Figure 21.2: Icon - Link... Send via E-Mail

21.3 Copy Folder link to the Clipboard

To copy a folder link to the Clipboard, complete the following steps [1]:

1. Select the document in the ecoDMS table.

2. Right-click the document - "Link... Copy to Clipboard"

3. You can paste the link to any position (for example in your Internet Browser or in other external applications).

4. When you click the link, ecoDMS Client opens.

    a) The copied folder is selected.

    b) The folder documents are displayed in the table.

Figure 21.3: Folder - Link...Copy to Clipboard

21.4 Send Folder Link via E-Mail

To copy a folder link to the Clipboard, complete the following steps [1]:

1. Select the document in the ecoDMS table.

2. Right-click the document - "Link... Copy to Clipboard"

3. A mail window of your standard mail client opens. The selected folder is paste as text of the mail.

4. When you click the link, ecoDMS Client opens.

    a) The copied folder is selected.

    b) The folder documents are displayed in the table.

Figure 21.4: Folder - Link...send via E-Mail

Important Information for Chapter 21

[1]   *Wenn ein Link als HTTP-Hyperlink erscheinen soll, muss dies im Einstellungsdialog vom zuständigen Administrator entsprechend eingestellt werden. Anderenfalls werden Links grundsätzlich als ecoDMSUrl angezeigt. Um Links öffnen bzw. anzeigen zu können, benötigt der User Zugriff auf das ecoDMS-System und muss über den Connection Manager verbunden sein.*

22 Send Document via E-Mail

- Depending on the application, you cannot send attachments directly from ecoDMS. This is not an error in ecoDMS. Refer to https://bugs.launchpad.net/ubuntu/+source/xdg-utils/+bug/1019259 for more information on this topic for Ubuntu, for example. To avoid this issue, the administrator can store a syntax for all users in the settings dialogue to Open the email client (see chapter "Settings").
- The file name of the attachment can only be changed before sending in Windows clients.

You can send archived documents from ecoDMS as an email attachment.

1. Select documents in the ecoDMS table.

2. Now select the "Send" function. You have following options:
   a) Right-click one of the selected documents - Send **or**
   b) Click the "Send" icon in toolbar **or**
   c) Click "File - Send" in menu bar **or**
   d) Enter this shortcut: CTRL + M

3. In Windows, a window now opens to change the file name.
   a) Overwrite the file name if necessary.
   b) You cannot change the file type. This is automatically appended by the system.
   c) Confirm your entry with "OK" or cancel the process with "Cancel".

4. A mail window of your default mail client opens. The selected documents are added as attachment of the email.

Figure 22.1: Icon - Send

23 Resubmission

The archiving system has an integrated reminder function for archived documents. Documents often need to be processed at a later date. The "Resubmission" status ensures that these documents are displayed at a specified date. In addition to the statuses, the settings dialogue allows you to enable an additional reminder function for such documents. Therefore, when you start ecoDMS Client, the documents for resubmission display immediately. A window opens and displays the number of documents for resubmission for the period set in the settings dialogue [1, 2].

23.1 Reminder Phases

ecoDMS reminds you shortly ahead of time about the document by displaying an icon at the DocID and by highlighting the table entry in colour. Moreover, the document is automatically linked into the "ToDo" status. The users then know that this file can/should be processed. The following steps are available [1, 2]:

Icon and Colour	Days to Processing
none	>7
	<=7
	<=3
	<1 (in addition, the document displayed in the "ToDo")

23.1.1 Status Window

Use the Status window in ecoDMS Client to select the available statuses, including the "Resubmission" status. Click the status to display the documents in the main table. Another filter option is available there. The "Resubmission" status has substatuses in the front end. These are fixed integrated filters. The Resubmission status in the front end is subdivided as follows:

- Resubmission
  - Expired
  - Next 7 days

23.2 Configure Resubmission

You configure the resubmission in form of a classification. To do this, you have various options:

23.2.1 Resubmission Function

You can select the Resubmission function directly [1, 2]:

1. Select the document in the ecoDMS table.

2. To select Resubmission, you have various options:

    a) In the menu click "File - Resubmit..." **or**

    b) Click the icon "Resubmit..." on the toolbar **or**

c) Right-click the mouse on the document in the table - "Resubmit..." **or**

d) Enter the shortcut: CTRL + Z.

3. The "Resubmit Document On..." dialogue opens.

4. Select the date in the calendar.

  a) Use the arrow keys (left, right) to switch between the months.

  b) You can change the month and the year using the navigation in the calendar header.

  c) Click "Today" to set the current day.

  d) You can also enter the date directly. The first number is entered in the calendar.

5. Confirm your entry and selection with "OK".
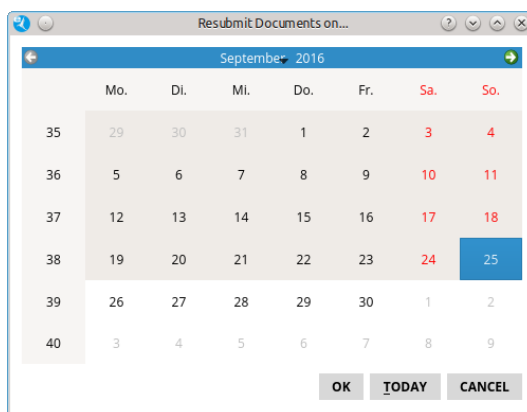
Figure 23.1: Calendar - Select Date

23.2.2 Classification dialogue

Via the Classification dialogue, you can also set the Resubmission Status [1, 2]:

1. Open the Classification dialogue for the document(s).

2. Select the entry field for the Status attribute.

  a) Either by double-clicking **or**

  b) By entering the letter "e" (edit).

3. Select the Status.

  a) If you select Resubmission, the calendar opens to enter the resubmission date.

4. Select the date in the calendar.

  a) Use the arrow keys (left, right) to switch between the months.

  b) You can change the month and the year using the navigation in the calendar header.

  c) Click "Today" to set the current day.

  d) You can also enter the date directly. The first number is entered in the calendar.

5. Confirm your entry and selection with "OK".
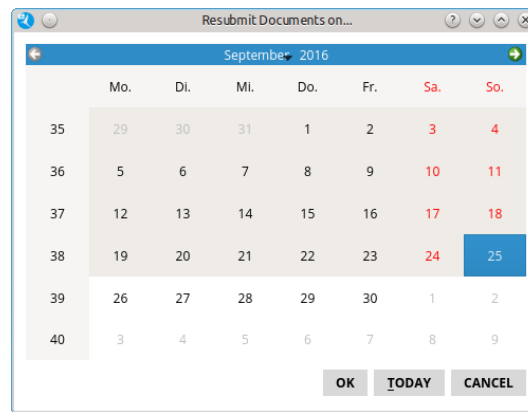
Figure 23.2: Calendar - Select Date

23.2.3 Table in ecoDMS

The status can be set via the ecoDMS Table [1, 2]:

1. Select the document in the ecoDMS table.

2. Select the entry field for the Status attribute.
   a) Either by double-clicking or
   b) By entering the letter "e" (edit).

3. Select the Status.
   a) If you select Resubmission, the calendar opens to enter the resubmission date.
   b) Select the date in the calendar.
      i. Use the arrow keys (left, right) to switch between the months.
      ii. You can change the month and the year using the navigation in the calendar header.
      iii. Click "Today" to set the current day.
      iv. You can also enter the date directly. The first number is entered in the calendar.

4. Confirm your entry and selection with "OK".
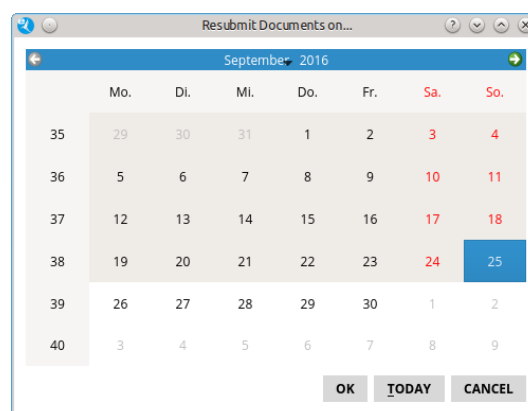
Figure 23.3: Calendar - Select Date

23.2.4 Drag & Drop Classification in ecoDMS

Via drag and drop documents can be pushed to the status Resubmission [1, 2]:

1. Select the document(s) in the ecoDMS table.

2. Grab the document(s) "at the DocID".

3. Drag the document(s) to the required Status in the ecoDMS Status window.

    a) If you select Resubmission, the calendar opens to enter the resubmission date.

    b) Select the date in the calendar.

        i. Use the arrow keys (left, right) to switch between the months.

        ii. You can change the month and the year using the navigation in the calendar header.

        iii. Click "Today" to set the current day.

        iv. You can also enter the date directly. The first number is entered in the calendar.

4. Confirm your entry and selection with "OK".
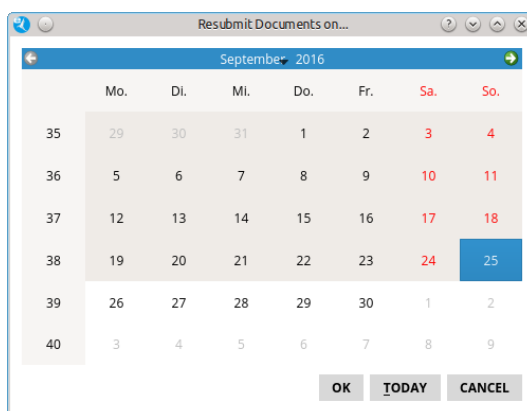
Figure 23.4: Calendar - Select Date

23.3 Display Resubmissions

When you start the client, you can display pending resubmissions in a dialogue. The administrator can enable this dialogue for all users in the settings dialogue. To display resubmissions, complete the following steps:

1. Start ecoDMS Client.

2. If there are resubmissions, a dialogue displays the number of relevant documents.

3. Click "Display" to show the documents or cancel the operation with "Cancel".

    a) To close the filter and return to the normal view, click the icon "Reset All Active Filters".

Figure 23.5: Icon - Reset All Active Filters

Important Information for Chapter 23

[1] *Diese Funktion setzt zur Ansicht und Nutzung bestimmte System-Berechtigungen voraus.*

[2] *Ein Dokument darf nur klassifiziert und versioniert werden, wenn dem Benutzer für das jeweilige Dokument eine entsprechende Berechtigung zur Klassifizierung vorliegt.*

24 Print Documents

- The documents need to be printable files.
- The respective computers must contain the necessary programmes for opening the specific files.
- This function is only available under Windows.
- To start the printing process, ecoDMS opens the documents one after the other and closes them again automatically.

ecoDMS has a printing function. This function enables you to print selected documents directly from ecoDMS.

1. Select the documents in the ecoDMS table

2. To select the "Print" function:

   a) Right-click one of the selected documents in the table **or**

   b) click the printer icon on the toolbar

Figure 24.1: Icon - Print

25 Backup

With the ecoDMS backup functions, you can secure your data and restore it if necessary.

1. We recommend you execute a data backup every day.
2. You should store the data backup on an external data carrier.
3. While you run the data backup, no other users should be working with ecoDMS or be connected to ecoDMS Server.
4. The size and the time to complete the backup depends on the amount of data / data size. Depending on the data volume this operation can take a while.
5. Ensure that enough space is available on the destination path to save your backup.
6. ecoDMS saves all settings, user data and classifications in a database.
    a) We use the free, cross-platform postgreSQL component as a database.
    b) The archived files and documents are stored safely encoded in containers within the user's ecoDMS server.
7. The default data volume of such a container is approx. 500 MB. This is a fixed value specified by ecoDMS.
    a) As soon as the data volume is reached, the system automatically creates a new container.
8. During the backup process the containers can be backed up separately and independent of the postgreSQL database.
9. In the settings dialogue, you can configure automated, time-controlled backups.
    a) ecoDMS then performs the backup automatically at the specified time.
    b) Data backups can be configured as required.
        i. For example, you can make a full backup of the entire database and the containers.
        ii. Alternatively, you can also make an incremental data backup. In this case ecoDMS will complete the existing backup with the latest changes in the selected rhythm.
10. The oneClick Backup component is an inherent part of ecoDMS Server installation.
    a) With a mouse-click you can manually initiate a full backup of the entire database and container.
    b) The generated backup file (.zip) can be used to restore data if necessary.
11. As an option, the backup and restore function can also be carried out via console applications.
    a) To do this, either use the integrated ecoDMS script or create your own scripts to call this function.
12. We recommend you completely clear the Inbox before backing up your data.
    a) Background: If the backup is restored on a different operating system (e.g. Windows -> Linux), the paths to the files in the Inbox are no longer correct. You can only delete them from the server via the dialogue which displays.

25.1 Automatic Backup

In the settings dialogue, you can configure automated, time-controlled backups. ecoDMS then performs the backup automatically at the specified time. Data backups can be configured as required. For example, you can make a full backup of the entire database and the containers. Alternatively, you can also make an incremental data backup. In this case ecoDMS will complete the existing backup with the latest changes in the selected rhythm [2, 3, 1].
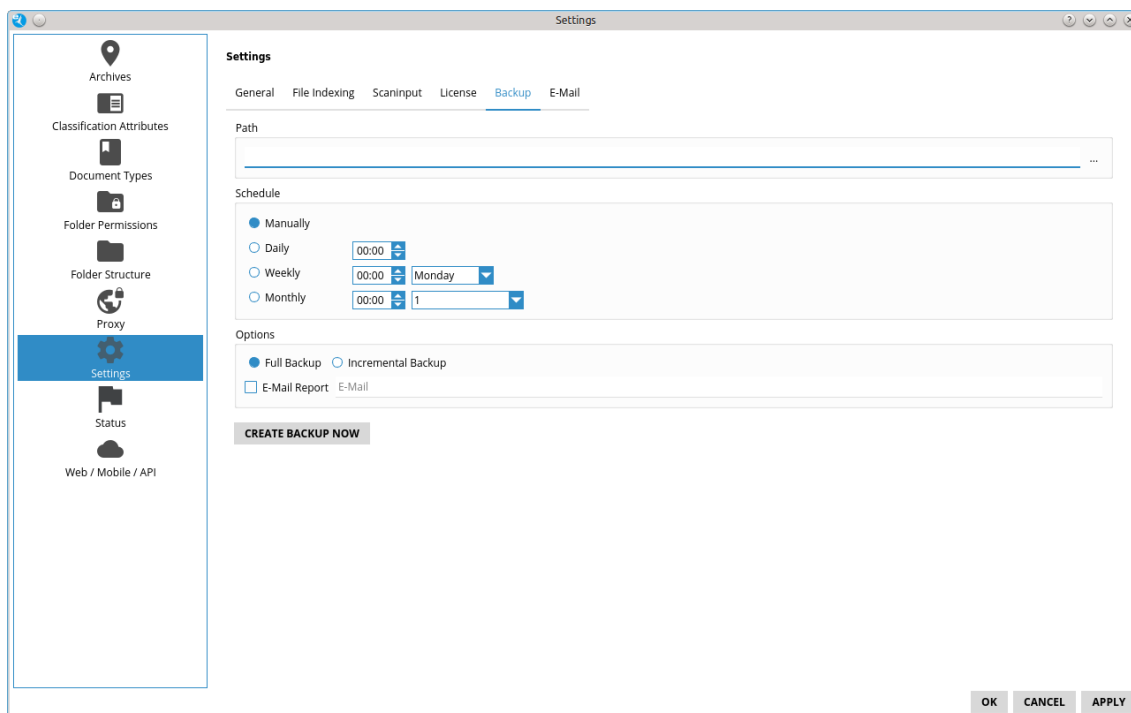
Figure 25.1: Settings - Settings - Backup

This section describes possible settings for automatic backup.

1. Click "Options - Settings" in ecoDMS Client.

2. Now click "Settings" and open the "Backup Tab".

   a) Make the required settings in this window.

3. **Path for Windows and Linux distributions:** Select the target path for saving backups. ecoDMS saves the backups you create in the selected folder. ecoDMS Server provides the local data carriers for storing backups.

   a) **Target Path for NAS systems via Docker image:** If you want to use the ecoDMS backup and restore function on your NAS, you require a folder for backup and restore (see installation manual). The backup and restore folders should be stored separately from the actual ecoDMS data and backed up accordingly. The mount paths are:

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

   i. In the settings dialogue of ecoDMS Client, select the "/srv/data/backup" path on the "Backup" tab and confirm with a double-click.

   ii. The Path box should then display the entry "/srv/data/backup".

4. Select the intervals for your data backup.

   a) **Manually:** Enable this setting to manually start the data backup. In this case the backup is created when you click the "Create Backup Now" button.

   b) **Daily:** Enable this setting to execute the backup process every day at the same time.

   i. Enter the time at which you want ecoDMS to backup the data.

   c) **Weekly:** Enable this setting to execute the backup process every week on the same day and at the same time.

   i. Enter the time at which you want ecoDMS to backup the data.

   ii. Select the weekday.

   d) **Monthly:** Enable this setting to execute the backup process every month on the same day and at the same time.

      i. Enter the time at which you want ecoDMS to backup the data.

     ii. Select the day of the month.

5. Enable the type of backup you require. For example, you can make a full backup of all containers. Alternatively, you can also make an incremental data backup.

    a) **Full backup:** If you enable a full backup, ecoDMS executes a backup of all containers at the specified time.

       i. The backup file is saved in the selected folder as a ZIP file.

      ii. The duration of the data backup depends on the data volume of the archived files and the information.

     iii. This type of data backup may be relatively time-consuming because ecoDMS makes a full backup of the database and all containers.

    b) **Incremental backup:** If you enable the incremental backup, ecoDMS executes the data backup step-by-step. In this case ecoDMS completes the existing backup with the latest changes in the selected intervals.

       i. The incremental backup only saves the data that was changed or added since the last backup.

      ii. If you execute the incremental backup, ecoDMS creates five files/folders plus subfolders in the target folder of the backup:

        A. data, ocr, workdir, backup.sql, version

        B. These files/folders are extended during the next incremental backup and must therefore not be moved, renamed or deleted.

     iii. The backup file is saved in the selected folder as an unzipped folder.

     iv. To restore this incremental backup again,

        A. select these files/folders

        B. and create a ZIP file via the context menu.

     v. You can use this ZIP file to restore the entire ecoDMS archive.

     vi. The duration of the data backup depends on the size of the archived files and the information.

    vii. The first execution of the incremental backup may take longer because ecoDMS makes a full backup of the entire database and all available containers.

        A. ecoDMS then adds the latest changes and new data to the existing backup in the specified rhythm.

6. **E-Mail Report:** If you enable this function, ecoDMS sends a process report to the specified recipient after the backup has been executed. You must enter the mail server information on the "Email" tab in the settings dialogue (Options - Settings - Settings - Email). ecoDMS sends a report to the recipient(s) via email as soon as the backup has finished.

    a) Enter the recipient email address in the entry box. For example:

```
sample@demomail.de
```

    b) Separate several email recipients with a semicolon ";". Example:

```
first@demomail.de;second@demomail.de
```

7. **Create backup now:** Click "Create Backup Now" to immediately start the configured data backup (full or incremental backup) regardless of the set interval.

8. Save your settings by clicking "Apply" or abort the process with "Cancel"

9. To close the settings dialogue, click the "OK" button.

25.2 Backup under Windows

In the following the data backup process is described for Windows systems [2, 3, 1].

25.2.1 oneClick Backup (Software)

The ecoDMS oneClick Backup software is an inherent part of ecoDMS Server. With a mouse-click you can manually initiate a full backup of the entire database and container. In this case, the entire ecoDMS database, including all documents, structures, settings, users and attributes etc. are saved in a ZIP file. The generated backup file (.zip) can be used to restore data if necessary.

1. Make sure that no other users are working with ecoDMS or are connected to ecoDMS Server.

   a) First, exit all Connection Managers connected to the server.

   b) Check and close all other connections to the server (e.g. web client...).

2. Start the "oneClick Backup" programme via "Start -> Programme -> ecoDMS Server -> oneClick Backup"

3. The dialogue "oneClick Backup & Recovery" window opens.

4. Click the "..." button to select a destination folder for the data backup. After the data backup has successfully executed, the backup data is stored in a Zip file in the destination folder.

5. You can specify the compression type in the "Compression" area.

   a) Default

   > Automatic Mode: In this mode, the system automatically specifies a compression rate.

   b) Best speed:

   > The backup is compressed faster than in the default speed. However, in this mode the zip file is larger than in the default mode.

   c) Best compression:

   > The backup data is compressed to the smallest possible size. Because of the extreme compression, this backup setting needs much more time than the Default and the Best Speed modes.

   d) No compression:

   > The backup is generated without compression. This is the fastest data backup option. Because the data is not compressed, the completed backup might have a very big data volume and therefore it requires a lot of storage space.

6. Click "Start Backup" to start the data backup.

   > a) The duration of the backup depends on the data volume and the system environment. For large data volumes, the backup can take a long time.
   >
   > b) The operation is complete when "Finished..." is displayed in the last output line in the dialogue.

7. Click "Exit" to close the programme.

8. If the operation was successful, you can reconnect the Connection Manager and all other connections to ecoDMS Server.

Figure 25.2: oneClick Backup - Data Backup

25.2.2 Console Programme for Data Backup

- You must have administrator rights for this programme.
- When the execution runs via the "task planning", you must select the option "Execute with highest privileges".
- Once the server is installed, the programme is located in ecoDMS Server folder.
- You can reimport the backup via "ecoDMS oneClick Backup".

If ecoDMS Server is installed under Windows, a console backup programme is automatically supplied with the oneClick Backup programme. This can be used, for example, for automatic, time-controlled backups.

1. Make sure that no other users are working with ecoDMS or are connected to ecoDMS Server.

   a) First, exit all Connection Managers connected to the server.

   b) Check and close all other connections to the server (e.g. web client...).

2. Syntax-Request:

```
ecoDMSBackupConsole.exe [Backup-Save-Path] [optionally: Compression Rate]
```

3. Parameters:

    – /h displays the programme syntax.

    – Parameter 1 must be a valid folder path. The backup is saved in this folder.

    – Parameter 2 is optional. The compression rate can be selected here.

        – If no parameter is set, the data is zipped with the "default" compression.

        – You can select the following values. The "OneClick Data Backup" chapter provides further explanations.

            * best (best compression)

            * bestspeed (best speed)

            * no (no compression)

4. If the operation was successful, you can reconnect the Connection Manager and all other connections to ecoDMS Server.

25.3 Backup under Linux

In the following the data backup process is described for Ubuntu / Debian systems [2, 3, 1].

25.3.1 oneClick Backup (Software)

The ecoDMS oneClick Backup software is an inherent part of ecoDMS Server. With a mouse-click you can manually initiate a full backup of the entire database and container. In this case, the entire ecoDMS database, including all documents, structures, settings, users and attributes etc. are saved in a ZIP file. The generated backup file (.zip) can be used to restore data if necessary [2, 3, 1].

1. Make sure that no other users are working with ecoDMS or are connected to ecoDMS Server.

    a) First, exit all Connection Managers connected to the server.

    b) Check and close all other connections to the server (e.g. web client...).

2. Start "ecoDMS oneClick Backup" as root in your console or use the software manager:

    a) Software manager:

Figure 25.3: Open ecoDMS oneClick Backup

    b) Console: The following command must be run as root:

```
/opt/ecodms/ecodmsserver/tools
```

3. The dialogue "oneClick Backup & Recovery" window opens.

4. Click the "..." button to select a destination folder for the data backup. After the data backup has been successfully executed, the backup data is stored in a Zip file in the destination folder.

5. You can specify the compression type in the "Compression" area.

    a) Default

> Automatic Mode: In this mode, the system automatically specifies a compression rate.

    b) Best speed:

> The backup is compressed faster than in the default speed. However, in this mode the zip file is larger than in the default mode.

    c) Best compression:

> The backup data is compressed to the smallest possible size. Because of the extreme compression, this backup setting needs much more time than the Default and the Best Speed modes.

    d) No compression:

> The backup is generated without compression. This is the fastest data backup option. Because the data is not compressed, the completed backup might have a very big data volume and therefore it requires a lot of storage space.

6. Click "Start Backup" to start the data backup.

>   a) The duration of the backup depends on the data volume and the system environment. For large data volumes, the backup can take a long time.
>   b) The operation is complete when "Finished..." is displayed in the last output line in the dialogue.

7. Click "Exit" to close the programme.

8. If the operation was successful, you can reconnect the Connection Manager and all other connections to ecoDMS Server.
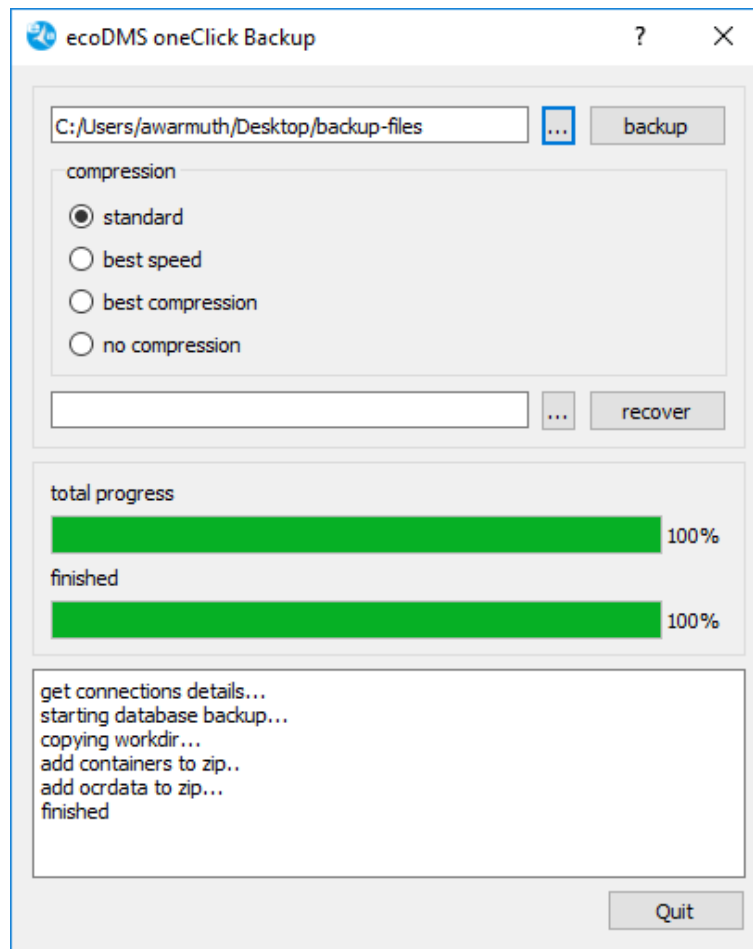
Figure 25.4: oneClick Backup & Recovery

25.3.2 Console Programme for Data Backup

When installing ecoDMS Server, a file called "ecoDMSBackupConsole" is stored under Ubuntu/Debian in the /opt/ecodm-s/ecodmsserver/tools folder. When this script executes, it creates a backup of the folder /opt/ecosims/workdir and creates a dump for the database (backup.sql). The files are then saved in a pre-defined destination folder as a zip-file [2, 3, 1].

1. Make sure that no other users are working with ecoDMS or are connected to ecoDMS Server.

   a) First, exit all Connection Managers connected to the server.

   b) Check and close all other connections to the server (e.g. web client...).

   The following commands must be run as root.

2. 2. For data backup, enter the following command at /opt/ecodms/ecodmsserver/tools:

   ```
   ./ecoDMSBackupConsole /TargetPath [best|bestspeed|no]
   ```

   a) The brackets contain the optional parameters for the compression. The degree of compression influences the duration of the compression process.

      i. best: the backup is packed with the highest degree of compression

      ii. bestspeed: the backup is packed with the fastest compression

      iii. no: the backup is packed without compression

      iv. If no parameter is given, the data is packed with the default compression.

3. The backup can be recovered as a zip-file using the oneClick Backup, or manually after the zip-file has been extracted.

25.4 Backup under Synology (NAS)

The following describes how to backup ecoDMS data on a Synology NAS system [2, 3, 1].

1. Start the ecoDMS container if it is not already running.

2. Make sure that no other users are working with ecoDMS or are connected to ecoDMS Server.
   a) First, exit all Connection Managers connected to the server.
   b) Check and close all other connections to the server (e.g. web client...).

3. Open the "backup" folder in the "File Station" of the ecoDMS data folder.

4. Create an empty file "create" and upload it to the "backup" folder.

5. Backup will start automatically after a few seconds.

6. The system then automatically saves the finished backup file in this folder.

7. The system automatically deletes the "create" file after the backup has been processed successfully.

Figure 25.5: Synology - Create Backup

25.5 Backup under QNAP (NAS)

The following describes how to backup ecoDMS data on a Synology QNAP system [2, 3, 1].

1. Start the ecoDMS container if it is not already running.

2. Make sure that no other users are working with ecoDMS or are connected to ecoDMS Server.
   a) First, exit all Connection Managers connected to the server.
   b) Check and close all other connections to the server (e.g. web client...).

3. Open the "backup" folder in the "File Station" of the ecoDMS data folder.

4. Create an empty file "create" and upload it to the "backup" folder.

5. Backup will start automatically after a few seconds.

6. The system then automatically saves the finished backup file in this folder.

7. The system automatically deletes the "create" file after the backup has been processed successfully.

Figure 25.6: QNAP - Create Backup

Important Information for Chapter 25

[1] *Die Größe und die Dauer zum Erstellen des Backups ist abhängig von der Datenmenge / Datengröße. Je nach Datenvolumen kann dieser Vorgang einige Zeit in Anspruch nehmen. Dieser Vorgang sollte nur von einem erfahrenen Administrator durchgeführt werden.*

[2] *Es wird empfohlen die Inbox vor der Datensicherung vollständig zu leeren. Hintergrund: Wenn das Backup auf einem anderen Betriebssystem (z.B. Windows -> Linux) wiederhergestellt wird, stimmen die Pfade zu den Dateien in der Inbox nicht mehr. Man kann diese dann nur noch über einen eingeblendeten Dialog vom Server löschen.*

[3] *Es wird empfohlen täglich eine Datensicherung vorzunehmen. Die Datensicherung sollte auf einem externen Datenträger aufbewahrt werden. Während der Datensicherung sollten keine Benutzer mit dem ecoDMS Server verbunden sein / arbeiten.*

26 Restore

We recommend you execute a data backup every day. To do so, you have various options. Under Windows, ecoDMS contains its own user interface to manually backup and restore your data. The backup can also be executed manually with scripts or with your own tools. In this case, you must make a backup of the entire ecoDMS Server folder. If the database is installed separately, it also needs a backup.

1. During the data recovery process, ecoDMS Server is stopped. For this reason, no user should be connected with the system.
2. When the data recovery is imported, the existing data store is deleted irrevocably.
3. The duration of the recovery process depends on the data volume and the system environment. The recovery process may take longer for large data volumes.
4. If you want to restore your data based on an incremental backup, you must first create a ZIP file from the following data of your backup:
    a) data, ocr, workdir, backup.sql, version
        i. select these files/folders
        ii. and create a ZIP file via the context menu.
    b) This ZIP file can then be used for the recovery process.

26.1 Restore under Windows

In the following the data backup process is described for Windows systems.

26.1.1 oneClick (Software)

Use "oneClick Backup" to reimport your ecoDMS data. This programme is automatically installed as well when you install the "ecoDMS Server" [1].

1. Make sure that no other users are working with ecoDMS or are connected to ecoDMS Server.
    a) First, exit all Connection Managers connected to the server.
    b) Check and close all other connections to the server (e.g. web client...).
2. Start the "oneClick Backup" programme via "Start -> Programme -> ecoDMS Server -> oneClick Backup"
3. The dialogue "oneClick Backup & Recovery" window opens.
4. Click "..." button to select the zip file with the data backup.
5. Click the "Start Recovery" button to start the data backup.
6. Read the confirmation prompt and confirm with "Yes".
    a) **Please note that a positive confirmation of this message deletes the current database and replaces it with the backup.**
    b) The duration of the recovery depends on the data volume and the system environment. For large data volumes, the recovery can take a long time.
    c) The operation is complete when "Finished..." is displayed in the last output line in the dialogue.
7. If the operation was successful, you can reconnect the Connection Manager and all other connections to ecoDMS Server.

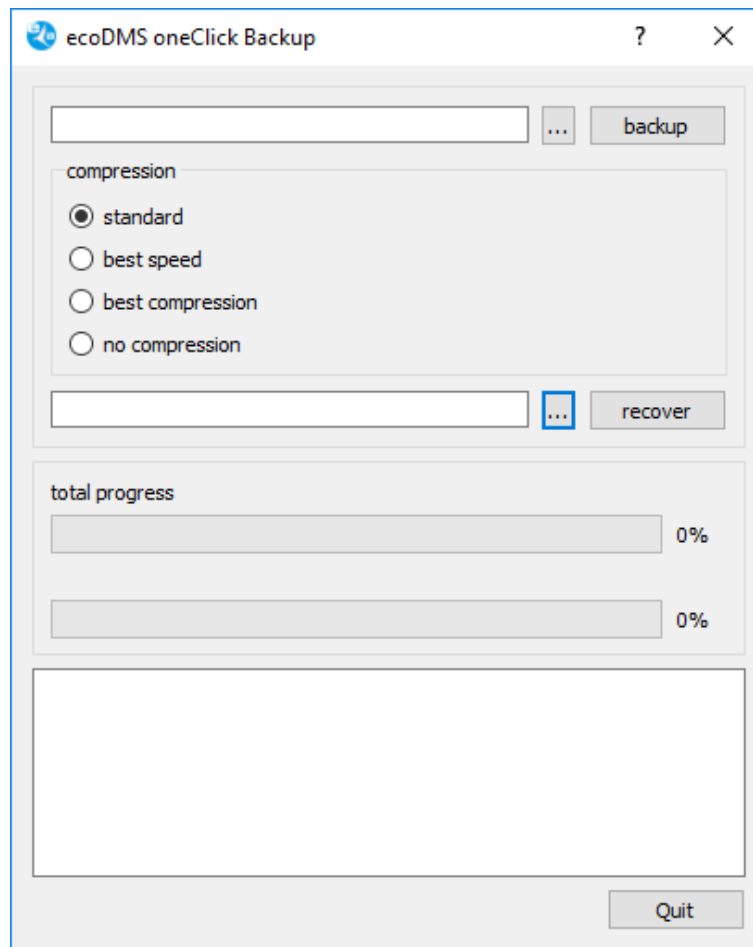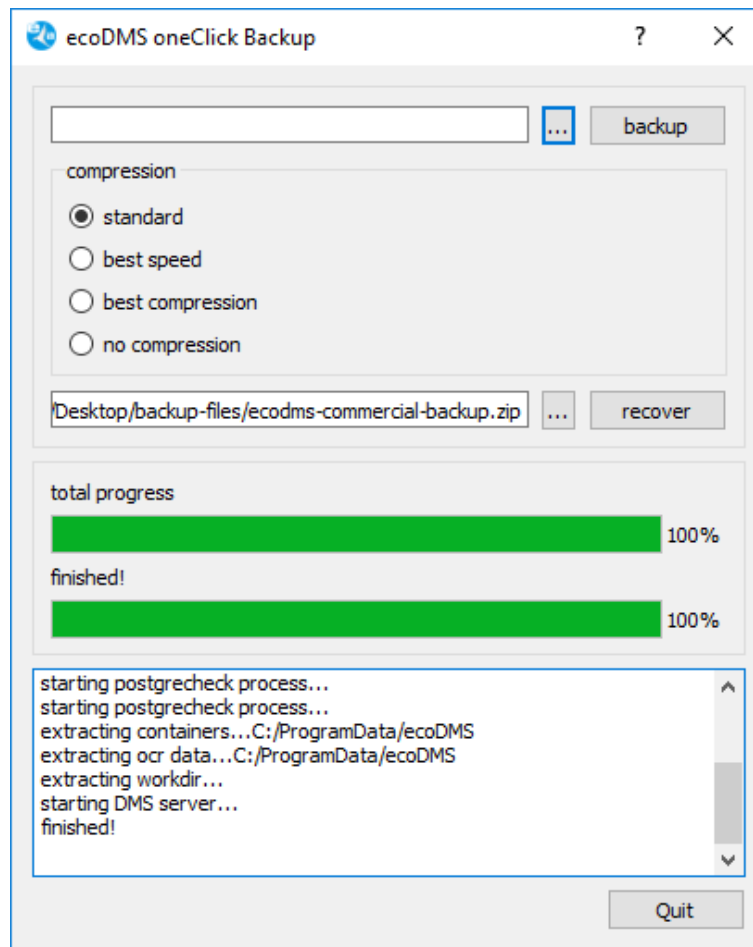Figure 26.1: oneClick Backup - Restore

26.2 Restore under Linux

In the following the data recovery process is described for Ubuntu / Debian systems.

26.2.1 oneClick (Software)

Use "oneClick Backup" to reimport your ecoDMS data. This programme is automatically installed as well when you install the "ecoDMS Server" [1].

1. Make sure that no other users are working with ecoDMS or are connected to ecoDMS Server.

   a) First, exit all Connection Managers connected to the server.

   b) Check and close all other connections to the server (e.g. web client...).

2. Start "ecoDMS oneClick Backup" as root in your console or use the software manager:

   a) Software manager:
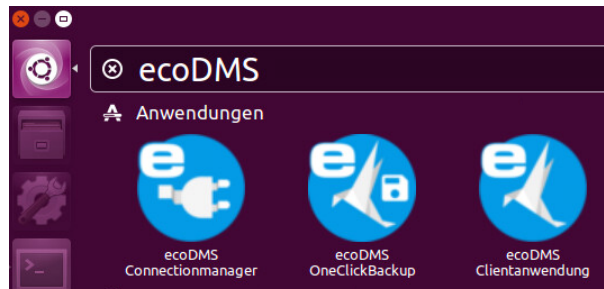
Figure 26.2: Open ecoDMS oneClick Backup

b) Console: The following command must be run as root:

```
/opt/ecodms/ecodmsserver/tools
```

3. The dialogue "oneClick Backup & Recovery" window opens.

4. Click "..." button to select the zip file with the data backup.

5. Click the "Start Recovery" button to start the data backup.

6. Read the confirmation prompt and confirm with "Yes".

   a) **Please note that a positive confirmation of this message deletes the current database and replaces it with the backup.**

   b) The duration of the recovery depends on the data volume and the system environment. For large data volumes, the recovery can take a long time.

   c) The operation is complete when "Finished..." is displayed in the last output line in the dialogue.

7. Click "Exit" to close the programme.

8. If the operation was successful, you can reconnect the Connection Manager and all other connections to ecoDMS Server.

Figure 26.3: oneClick Backup & Recovery

26.2.2 Restore via Console

The following describes how to restore ecoDMS data on a Linux Distribution via Console. The following commands must be run as root.

1. Use the console to open the "tools" folder.

```
/opt/ecodms/ecodmsserver/tools
```

2. Now you need the zip file created via backup. To load the backup, enter the following command:

```
./ecoDMSBackupConsole /PfadzurSicherung.zip restore
```

   a) **Please note that a restore deletes the current database and replaces it with the backup.**

   b) The duration of the recovery depends on the data volume and the system environment. For large data volumes, the recovery can take a long time.

26.3 Restore under Synology (NAS)

The following describes how to restore ecoDMS data on a Synology NAS system [1].

1. Make sure that no other users are working with ecoDMS or are connected to ecoDMS Server.

   a) First, exit all Connection Managers connected to the server.

   b) Check and close all other connections to the server (e.g. web client...).

2. Stop the ecoDMS container if it is still running.

3. Open the "restore" folder in the "File Station" of the ecoDMS data folder.

4. Copy the backup (created with "oneClick Backup" or "ecoDMSBackupConsole") in the "restore" folder.

5. Rename the backup file to "restore.zip".
   a) Please note the notation (use lower case).

6. Start the ecoDMS container.

7. The data recovery process is executed.
   a) This process may take a while.
   b) If the process is successful, the "restore.zip" file is renamed to "restore-processed.zip".
      i. In case of an error, the system converts the file to "restore-failed.zip".
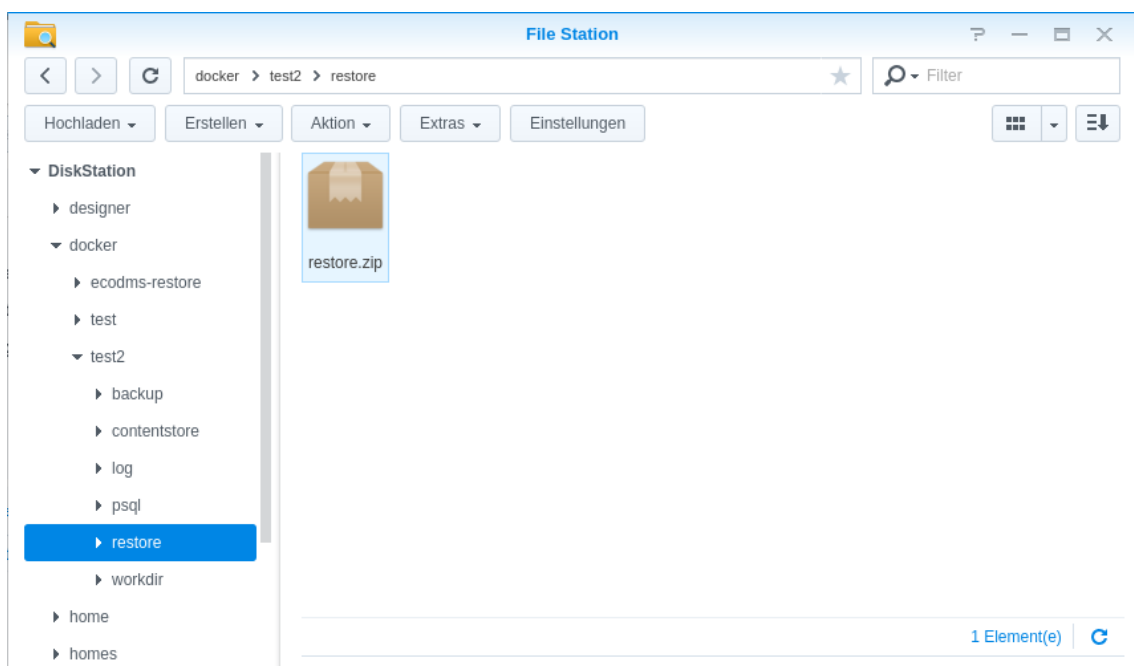
Figure 26.4: Synology - Make Restore

26.4 Restore under QNAP (NAS)

The following describes how to restore ecoDMS data on a QNAP NAS system [1].

1. Make sure that no other users are working with ecoDMS or are connected to ecoDMS Server.
   a) First, exit all Connection Managers connected to the server.
   b) Check and close all other connections to the server (e.g. web client...).

2. Stop the ecoDMS container if it is still running.

3. Open the "restore" folder in the "File Station" of the ecoDMS data folder.

4. Copy the backup (created with "oneClick Backup" or "ecoDMSBackupConsole") in the "restore" folder.

5. Rename the backup file to "restore.zip".
   a) Please note the notation (use lower case).

6. Start the ecoDMS container.

7. The data recovery process is executed.

    a) This process may take a while.

    b) If the process is successful, "restore.zip" file is renamed to "restore-processed.zip".

        i. In case of an error, the system converts the file to "restore-failed.zip".
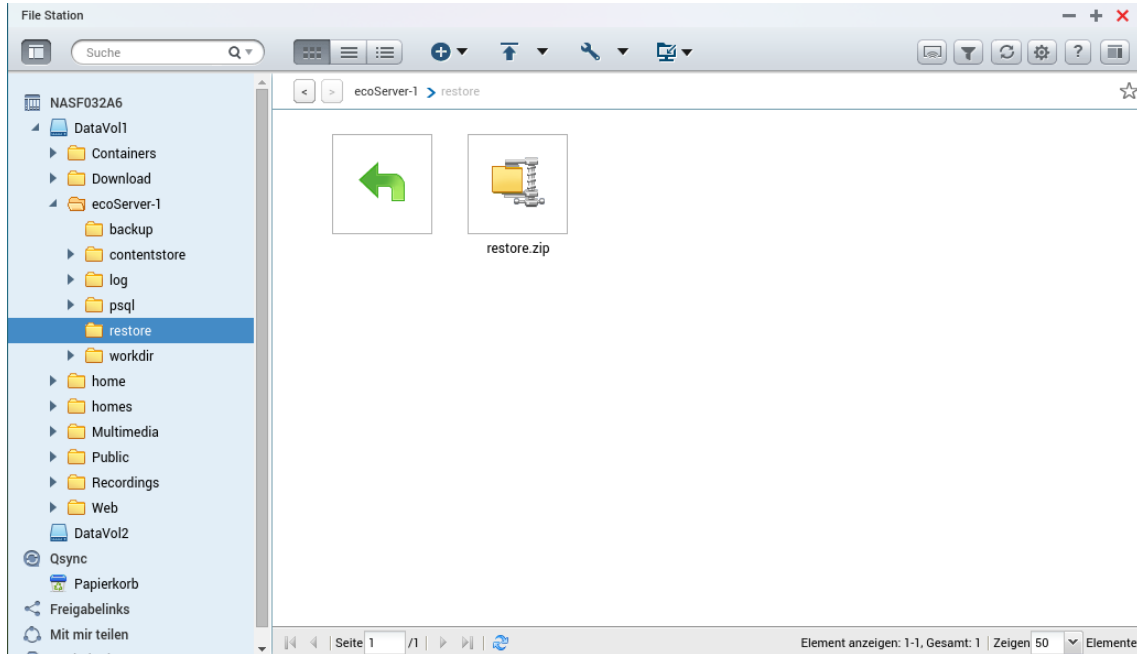
Figure 26.5: QNAP - Make Restore

Important Information for Chapter 26

[1] *Die Datensicherung sollte auf einem externen Datenträger aufbewahrt werden. Während der Daten-Wiederherstellung ist der ecoDMS Server gestoppt. Daher sollten in dieser Zeit keine Benutzer mit dem System verbunden sein. Mit dem Einspielen einer Datensicherung wird der aktuelle Datenbestand unwiderruflich gelöscht. Dieser Vorgang sollte nur von einem erfahrenen Administrator durchgeführt werden.*

27 PDF/A Printer

> This ecoDMS software is not available for macOS,

The virtual PDF/A Printer from ecoDMS enables easy archiving of documents from printable applications, such as picture and graphic programmes, inventory management systems and many more as a PDF-A document. The PDF/A Printer is a printer driver dedicated to archiving documents in ecoDMS. It forms the interface to external programmes and then allows quick and prompt document archiving. Moreover, a simple click on the print function of the respective programme saves the files directly in the appropriate folder and for the right person.

27.1 Settings (Windows)

> The settings for the ecoDMS PDF/A printer are only available under Windows.

You can configure various options for the PDF/A Printer. You can configure several print profiles. The most important thing is not to rename the standard printer. However, you can, of course, give the new print profiles customised names [1, 2].

1. In the Windows operating system, "Devices and Printers" window.
    a) You can usually find this window in the control panel of your operating system.
    b) Example:

    ```
    Control Panel\Hardware and Sound\Devices and Printers
    ```

2. Select ecoDMS Printer. Now click "Printer Properties" in the current Windows dialogue.

3. The "Print Server Properties" window opens.

4. Select the "Ports" tab. Click the "Configure Port" button.
    a) You must click this button because the following settings must be performed as administrator.

5. To get to the dialogue with ecoDMS Printer options, select the "ECODMS" port.

6. Now click "Configure".

7. Configure the settings for the printer at your work station, which can also be saved as different printers / print profiles. You can save any number of different print profiles with different settings on your PC.
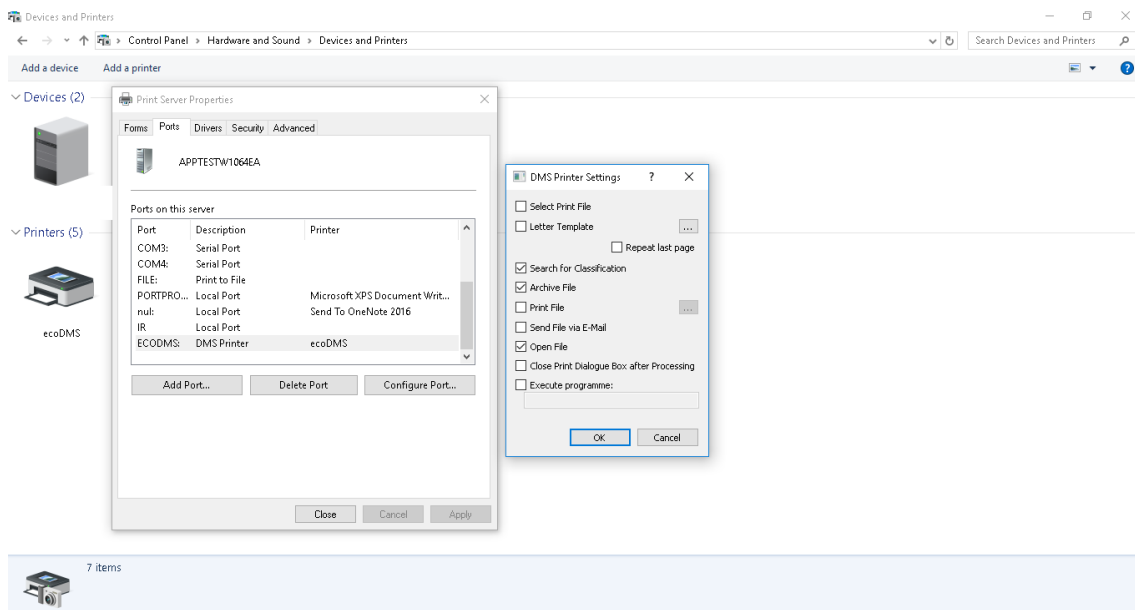
Figure 27.1: PDF/A Printer - Settings

27.1.1 Select Print File

If this function is enabled, the memory location on the file system is requested for this file when printing with this this print profile (after the PDF/A file has been created). For example, you can save a document as PDF/A file on the file system instead of, or in addition to, the archive.

27.1.2 Letter Template

A letter template can be assigned to the PDF/A files when they are created, so that the PDF/A file appears in the same design as the printed document on physical letter paper.

1. Enable the "Letter Template" function

2. Select the letter template you want to deposit as a background for the created documents, from your file system.

   a) When printing via this print profile, the letter template is added to the PDF/A as a background image.

27.1.3 Search for Classification

If this function is enabled, ecoDMS searches for matching classification templates when you archive a document via the PDF/A Printer.

27.1.4 Archive File

If this function is enabled, the document can be classified and archived in ecoDMS when printing with this print profile (after the PDF/A file has been created).

27.1.5 Print File

If this function is enabled, the document can be printed in paper form when printing with this print profile.

1. Enable the "Print file" function.

2. Select the destination printer.

27.1.6 Send File via E-Mail

If this function is enabled, the document can be E-Mailed while printing with this print profile (after creating the PDF/A file).

1. Enable the "Send file via E-Mail" function.

2. If you select this print profile, the email window automatically opens after the PDF/A file has been created.

3. The document is added as an attachment.

4. Recipient, sender and text, etc., can be assigned freely, as usual.

27.1.7 Open File

If this function is enabled, the finished document is opened after the PDF/A file has been created).

27.1.8 Close Print dialogue after Processing

If this function is enabled, the Print dialogue is closed after the specified functions have been processed.

27.1.9 Execute Programme

If this function is enabled, a programme starts after the specified functions have been processed. You can enter the application you want to start here.

27.2 Archive PDF/A

To archive documents via the PDF/A Printer, complete the following steps:

1. Select the function "Print" in your active programme.

> e.g. File - Print

2. Now select "ecoDMS" as printer.

3. The Classification dialogue opens.

> a) You can fill in the attributes either manually or automatically as a classification template.
> b) If ecoDMS recognises templates, the programme fills in the matching attributes and highlights them in green.

4. Archive the file with "OK" or cancel the process with "Cancel".

> You can also execute this step as "dark archiving process" (automatic archiving in background).

5. The file is stored in the PDF/A format and can be accessed via the table in ecoDMS.

If more print functions are enabled, they are processed consecutively.
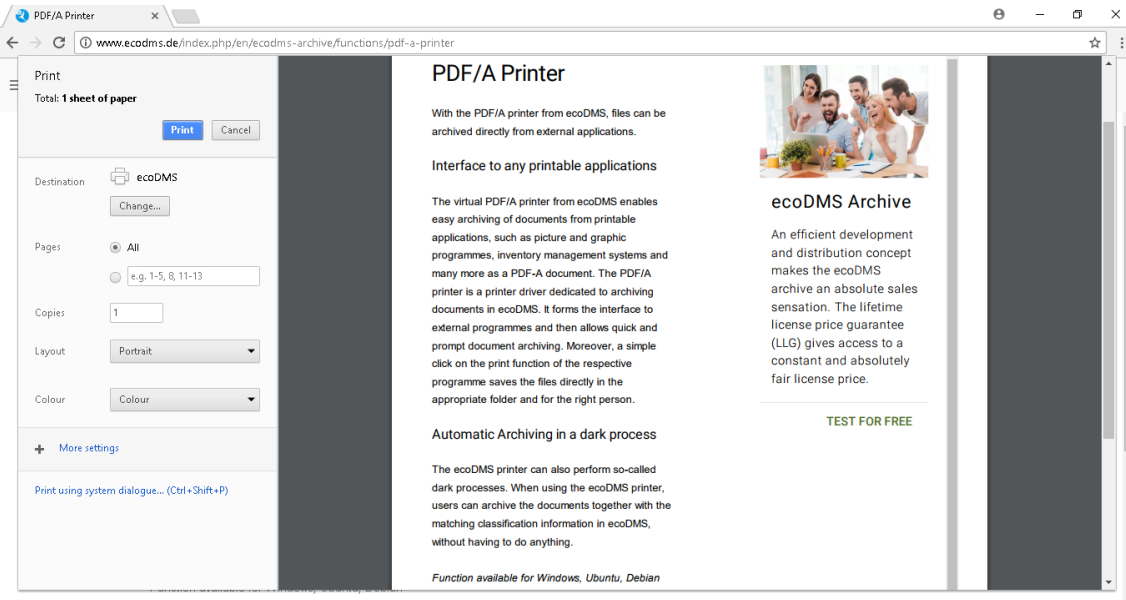
Figure 27.2: PDF/A Printer - Print Function (Here: Chrome Web Browser)
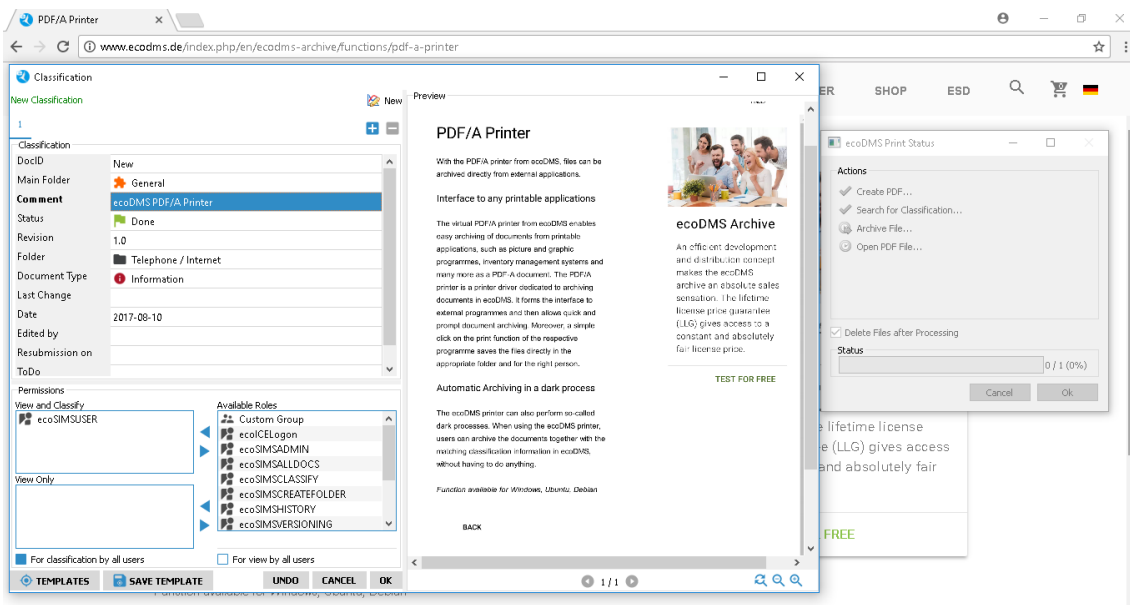
Figure 27.3: PDF/A Printer - Classify and Archive File in ecoDMS (Here: Chrome Web Browser)
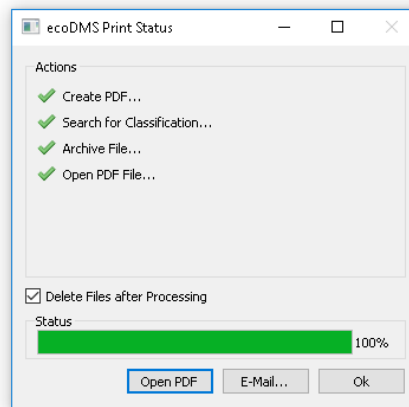
Figure 27.4: PDF/A Printer - Status Window (Example)

27.3 Automatic Archiving

The classification attributes and permissions of a classification template can be copied to the clipboard and pasted to any position. In this way you can save, for example, dummy text in documents that is recognised during archiving via ecoDMS PDF/A Printer. ecoDMS Printer can also perform so-called dark processes. When using ecoDMS Printer, users can archive the documents together with the matching classification information in ecoDMS, without having to do anything.

 – When pasting the template from the clipboard, ensure that the individual lines are not damaged by line breaks.

 – To hide the code text during archiving, we recommend you select a white font, for example, on a white background.

 – Moreover, you can perform automatic classification and archiving with dummy text (archiving in a dark process) [3, 4, 2].
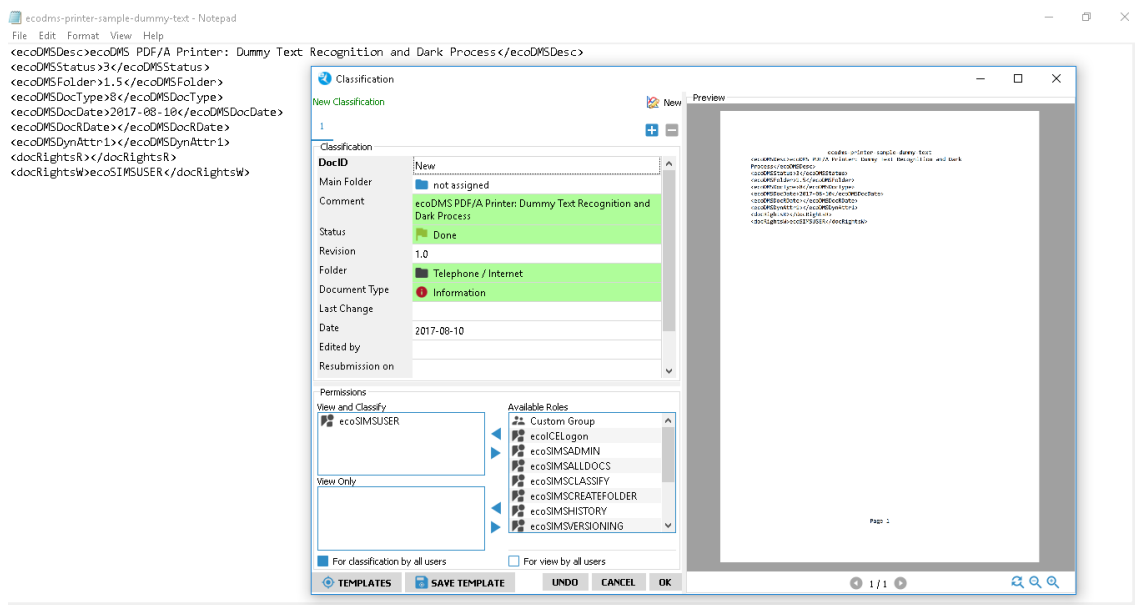
Figure 27.5: PDF/A Printer - Classify and archive file with dummy text (here: Notepad)

27.3.1 Copy Classification to Clipboard

To copy a classification into the clipboard, complete the following steps:

1. Open the "Classification dialogue".

2. Enter the attributes and permissions in the Classification dialogue according to how they should be assigned during automatic recognition.

3. Right-click the "Permissions" area.

4. Click "Copy Classification to Clipboard".

5. Add any document to the clipboard.

   a) If you add the <ecoDMSForceArchive/> command to the entry, the document is classified in a dark process when using the PDF/A Printer. This command only works with ecoDMS PDF/A Printer.

   b) In this case, the Classification dialogue does not open. The document is classified and deposited in ecoDMS.

Sample Code:

```
<ecoDMSDesc>This is a comment entry.</ecoDMSDesc>
<ecoDMSStatus>1</ecoDMSStatus>
<ecoDMSFolder>4.4</ecoDMSFolder>
<ecoDMSDocType>0</ecoDMSDocType>
<ecoDMSDocDate>2016-03-03</ecoDMSDocDate>
<ecoDMSDocRDate></ecoDMSDocRDate>
<ecoDMSDynAttr1>Payable</ecoDMSDynAttr1>
<ecoDMSDynAttr2>14785666</ecoDMSDynAttr2>
<ecoDMSDynAttr3>Sample Dummy Text</ecoDMSDynAttr3>
<docRightsR></docRightsR>
<docRightsW>ecoSIMSUSER</docRightsW>
```

27.3.2 Recognise Attributes via Dummy Text

A folder can automatically be entered for the classification via the ecoDMS folder key, which is for example the customer number. Therefore, the key only has to be entered in the Dummy Text. By archiving via ecoDMS PDF/A Printer the folder is automatically be recognised and assigned in ecoDMS. This requires that the key is stored in the ecoDMS folder structure. The automatic assignment of a folder with the help of Dummy Text is available as follows:

```
<ecoDMSFolder>SEARCH;[KEY]</ecoDMSFolder>
```

Sample Folder with Key: 123456

```
<ecoDMSFolder>SEARCH;123456</ecoDMSFolder
```

27.3.3 Archive Using Dark Process

> Note that the "Open File" function in ecoDMS PDF/A Printer settings is not enabled in this case (refer to the chapter "PDF/A Printer - Settings (Windows)

When using blind text, classification and archiving can proceed automatically. To do this, ecoDMS requires a specified additional instruction. The additional instruction prompts the system to execute the classification and archiving processes in the background. In this case the Classification dialogue is not displayed. The document is directly archived with the retrieved classification information when ecoDMS PDF/A Printer is executed.

1. Open the "Classification dialogue".

2. Enter the attributes and permissions in the Classification dialogue according to how they should be assigned during automatic recognition.

3. Right-click the "Permissions" window.

4. Click "Copy Classification to Clipboard".

5. Add any document to the clipboard.

6. Add the following command to the entry:

```
<ecoDMSForceArchive/>
```

    a) This command only works with ecoDMS PDF/A Printer.

    b) In this case, the Classification dialogue does not open. The document is classified and deposited in ecoDMS.

Sample code included command to run in the dark process:

```
<ecoDMSDesc>This is a comment entry.</ecoDMSDesc>
<ecoDMSStatus>1</ecoDMSStatus>
<ecoDMSFolder>4.4</ecoDMSFolder>
<ecoDMSDocType>0</ecoDMSDocType>
<ecoDMSDocDate>2016-03-03</ecoDMSDocDate>
<ecoDMSDocRDate></ecoDMSDocRDate>
<ecoDMSDynAttr1>Payable</ecoDMSDynAttr1>
<ecoDMSDynAttr2>14785666</ecoDMSDynAttr2>
<ecoDMSDynAttr3>Sample Dummy Text</ecoDMSDynAttr3>
<docRightsR></docRightsR>
<docRightsW>ecoSIMSUSER</docRightsW>
<ecoDMSForceArchive/>
```

27.4 Call E-Mail Client with Dummy Text

Using dummy text, you can transfer documents to the email client and enter the addressee, the subject and the name of the attachment using parameters.
You can extend the dummy text with the following line:

```
<ecoMailSubject>Subject</ecoMailSubject>
<ecoMailTo>mail@addressee1.com</ecoMailTo>
<ecoMailCC>mail@addressee2.com</ecoMailCC>
<ecoMailBCC>mail@addressee3.com</ecoMailBCC>
<ecoMailAttachmentName>Attachment name.pdf</ecoMailAttachmentName>
```

    – In ecoDMS Printer settings, both options "Search classification" and "Send file via email" must be enabled.
    – When printing with ecoDMS Printer, the default email client opens. A ready-to-send email is displayed containing the values defined in the dummy text.

Important Information for Chapter 27

[1]   *Diese Funktion / Komponente ist für Linux Distributionen nicht verfügbar.*

[2]   *Diese Funktion / Komponente ist für MacOS nicht verfügbar.*

[3]   *Diese Funktion setzt zur Ansicht und Nutzung bestimmte System-Berechtigungen voraus.*

[4]   *Ein Dokument darf nur klassifiziert und versioniert werden, wenn dem Benutzer für das jeweilige Dokument eine entsprechende Berechtigung zur Klassifizierung vorliegt.*

28 LibreOffice and OpenOffice Plugin

- This function requires a license for the full version of ecoDMS but can also be tested in the trial version. This function is not enabled in the Free4Three version.
- To use it, you need a Java installation which is enabled in the Office application (Options -> Advanced -> Java Options [enable]).
- The prerequisite for using this plugin is the installation of the current software components of: ecoDMS Server, ecoDMS Client and ecoDMS PDF/A Printer.

ecoDMS has its own plugin for LibreOffice and OpenOffice. Use the plugin to directly archive documents from the "Writer, Calc and Impress" applications in ecoDMS. When archiving, ecoDMS saves the documents in PDF/A and in the original Office format. You can edit and save the original file as a new version if required [2, 3, 4, 1].

28.1 Archive Document

To archive documents from LibreOffice or OpenOffice in ecoDMS, proceed as follows:

1. Create an Office file

2. Select one of the following function calls for archiving
   a) Office toolbar -> ecoDMS Icon (Save to Archive)
   b) Office Menu -> ecoDMS -> Save to Archive

3. Archiving is prepared
   a) If you are connected to the Connection Manager using several profiles, ecoDMS prompts you to select the target profile for archiving

4. The classification dialogue opens

- You can either fill in the attributes manually, or automatically via a classification template
- If ecoDMS recognises a template, the programme fills in the matching attributes and highlights them in colour
- Before archiving, please note the following settings:
  - If you tick the "Finalise document" checkbox, you cannot make changes to the document after archiving. If you want to make changes, the document needs to be archived in ecoDMS as a new file.
  - If the "Finalise document" checkbox is NOT ticked, the document can subsequently be opened through version control, edited, and filed as a new version.

5. Archive the files with "OK" or abort the process with "Cancel".

- The file is saved in ecoDMS in the PDF/A format and displays in the preview
- In addition, the original file is archived as a version for the PDF/A in ecoDMS
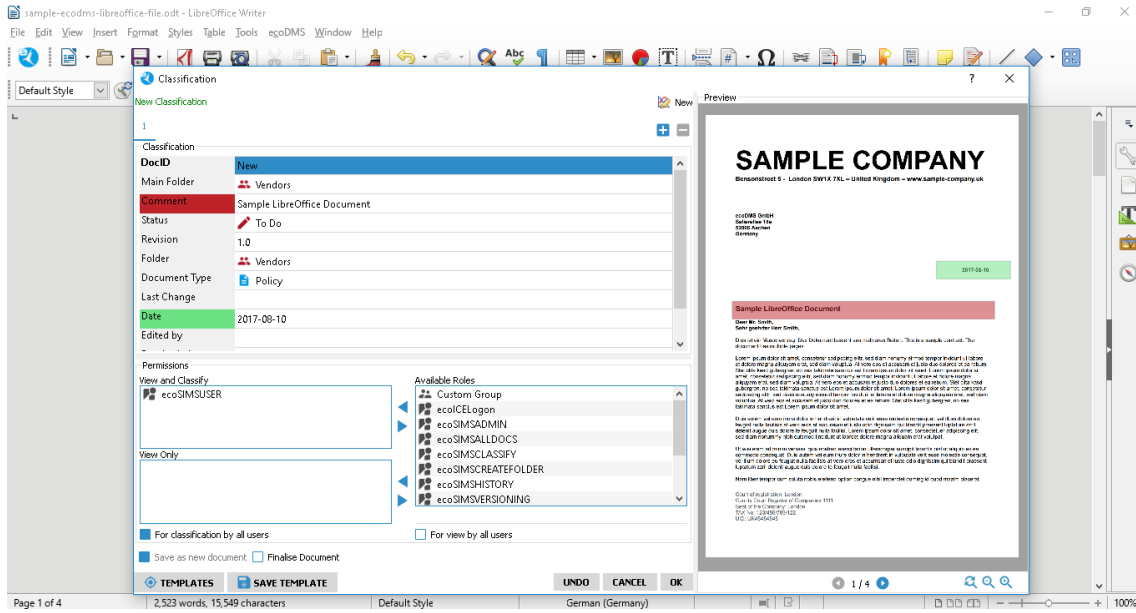
Figure 28.1: LibreOffice - Classify & Archive Document (Here: Writer)
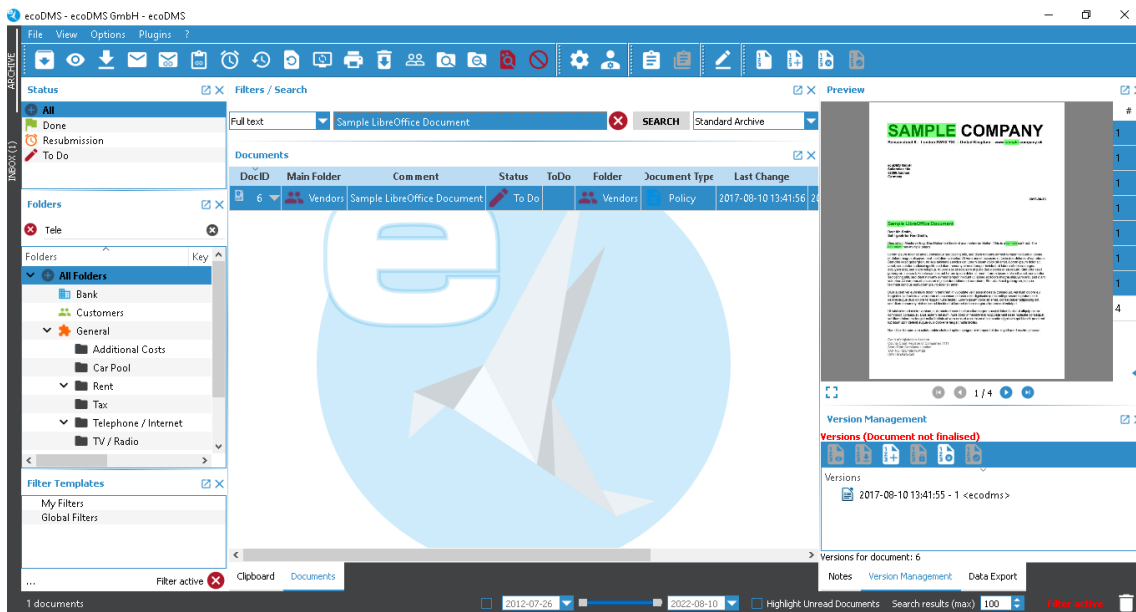
Figure 28.2: LibreOffice - Document with Preview and Version No. 1 in ecoDMS

28.2 Edit Document

You can only save a new version if the document is
– not yet finalised in ecoDMS
– not checked out by another user

If an Office document is not yet finalised in ecoDMS, you can open the original file from ecoDMS, edit it with Office and then archived the file as a new version with the ecoDMS plugin.

1. Open an original file from the "Versions Management" in ecoDMS

2. Make your changes in Office

3. Select one of the following function calls for archiving

   a) Office toolbar -> ecoDMS Icon (Save to Archive)

   b) Office Menu -> ecoDMS -> Save to Archive

   c) Use the standard Office save function

   > – Office menu -> File -> Save (Ctrl + S)
   >   – The system automatically detects that the file was opened from ecoDMS and opens the appropriate classification
   > – Office menu -> File -> Save As (Ctrl + Shift + S)
   >   – saves the file as usual in the local file system and not in ecoDMS

4. Archiving is prepared

   a) If you are connected to the Connection Manager using several profiles, ecoDMS prompts you to select the target profile for archiving

5. The existing classification is loaded

   > – Before archiving, please note the following settings:
   >   – If you tick the "Finalise document" checkbox, you cannot make changes to the document after archiving. If you want to make changes, the document needs to be archived in ecoDMS as a new file.
   >   – If the "Finalise document" checkbox is NOT ticked, the document can subsequently be opened through version control, edited, and filed as a new version.

6. Archive the emails with "OK" or abort the process with "Cancel".

   > – The file is saved in ecoDMS in the PDF/A format and displays in the preview
   > – In addition, the original file is archived as a new version for the PDF/A in ecoDMS

28.3 Re-Archive Document

You can open the original file of an archived Office file from ecoDMS and store it again as a new document.

1. Open an original file from the "Version Management" in ecoDMS

2. Make your changes in Office

3. Select one of the following function calls for archiving

   a) Office toolbar -> ecoDMS Icon (Save to Archive)

   b) Office Menu -> ecoDMS -> Save to Archive

4. Archiving is prepared

   a) If you are connected to the Connection Manager using several profiles, ecoDMS prompts you to select the target profile for archiving

5. The existing classification is loaded

> – You can adapt the classification for the new document accordingly

6. Enable the "Save as new document" function in the classification dialogue

> – The file is then archived in ecoDMS not as a new version but as a new document
> – In this case ecoDMS applies any changes in the classification to the new document. The classification of the "original version" remains unchanged
> – If you tick the "Finalise document" checkbox, you cannot make changes to the document after archiving
> – If the "Finalise document" checkbox is NOT ticked, the document can subsequently be opened through version control, edited, and filed as a new version

7. Archive the emails with "OK" or abort the process with "Cancel"

> – The file is saved in ecoDMS in the PDF/A format and displays in the preview
> – In addition, the original file is archived as a new version for the PDF/A in ecoDMS

Important Information for Chapter 28

[1] *Diese Funktion setzt eine Lizenz der ecoDMS-Vollversion voraus, kann aber in der Demozeit getestet werden und wird anschließend automatisch deaktiviert, bis eine Lizenz eingespielt wird.*

[2] *Diese Funktion setzt zur Ansicht und Nutzung bestimmte System-Berechtigungen voraus.*

[3] *Voraussetzung zur Verwendung dieses Plugins ist die Installation der aktuellsten Software-Komponenten von ecoDMS Server, ecoDMS Client und ecoDMS PDF/A Drucker.*

[4] *Zur Verwendung dieser ecoDMS-Komponente muss Java installiert in der Office-Anwendung aktiviert sein (Optionen -> Erweitert -> Java Optionen [aktivieren]).*

29 Microsoft Office Plugin

> – This function requires a license for the full version of ecoDMS but can also be tested in the trial version. This function is not enabled in the Free4Three version.
>
> – The prerequisite for using this plugin is the installation of the current software components of: ecoDMS Server, ecoDMS Client and ecoDMS PDF/A Printer.

The MS Office Plugin allows you to archive directly from Microsoft Word, Excel, PowerPoint and Outlook under Windows. The documents can be archived from Office in ecoDMS. They are then available as PDF/A document and in the original format. If requested, the original file can be edited further and saved as a new version [2, 3, 1].

29.1 Archive Document

To archive documents from MS Office in ecoDMS, proceed as follows:

1. Create an Office file

2. Select one of the following function calls for archiving

   a) Office toolbar -> ecoDMS icon (Archive) (in the Office "Start" tab)

   b) Office menu -> ecoDMS -> Archive (display depends on the MS Office version)

3. Archiving is prepared

   a) If you are connected to the Connection Manager using several profiles, ecoDMS prompts you to select the target profile for archiving

4. The classification dialogue opens

> – You can either fill in the attributes manually, or automatically via a classification template
> – If ecoDMS recognises a template, the programme fills in the matching attributes and highlights them in colour
> – Before archiving, please note the following settings:
>   – If you tick the "Finalise document" checkbox, you cannot make changes to the document after archiving. If you want to make changes, the document needs to be archived in ecoDMS as a new file.
>   – If the "Finalise document" checkbox is NOT ticked, the document can subsequently be opened through version control, edited, and filed as a new version.

5. Archive the emails with "OK" or abort the process with "Cancel".

> – The file is saved in ecoDMS in the PDF/A format and displays in the preview
> – In addition, the original file is archived as a version for the PDF/A in ecoDMS

Figure 29.1: Microsoft Office - Classify & Archive Document (Here: Word)
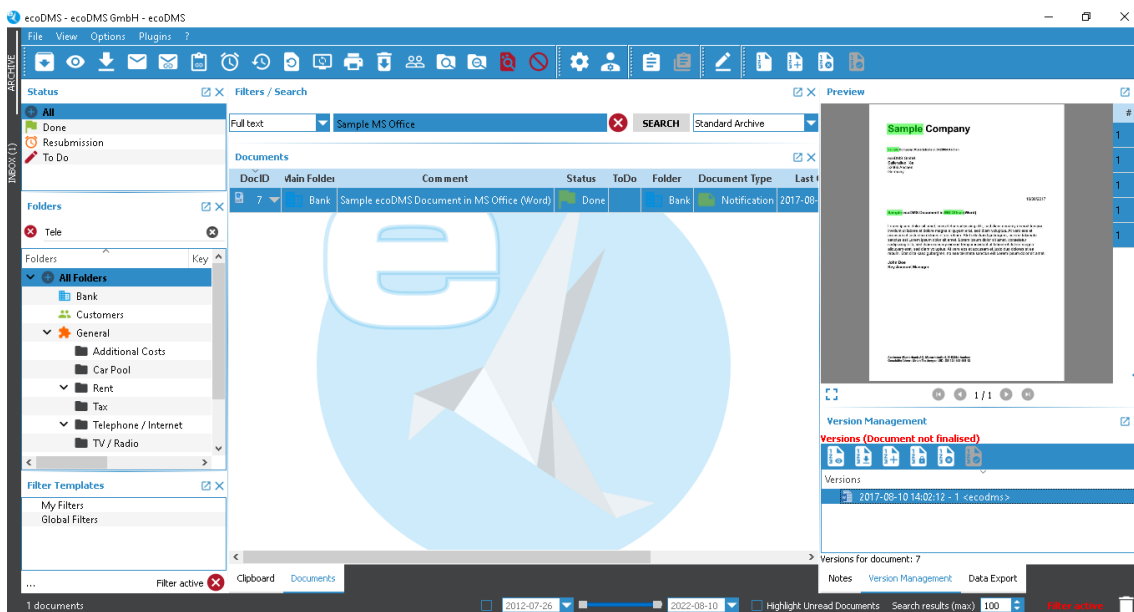
Figure 29.2: Microsoft Office - Document with Preview and Version No. 1 in ecoDMS

29.2 Edit Document

You can only save a new version if the document is
- not yet finalised in ecoDMS
- not checked out by another user

If an Office document is not yet finalised in ecoDMS, you can open the original file from ecoDMS, edit it with Office and then archived the file as a new version with the ecoDMS plugin.

1. Open an original file from the "Version Management" in ecoDMS

2. Make your changes in Office

3. Select one of the following function calls for archiving
   a) Office toolbar -> ecoDMS Icon (Archive)
   b) Office menu -> ecoDMS -> Archive (display depends on the MS Office version)
   c) Use the standard Office save function

   > – Office menu -> File -> Save
   >   – The system automatically detects that the file was opened from ecoDMS and opens the appropriate classification
   > – Office menu -> File -> Save As
   >   – saves the file as usual in the local file system and not in ecoDMS

4. Archiving is prepared
   a) If you are connected to the Connection Manager using several profiles, ecoDMS prompts you to select the target profile for archiving

5. The existing classification is loaded

   > – Before archiving, please note the following settings:
   >   – If you tick the "Finalise document" checkbox, you cannot make changes to the document after archiving. If you want to make changes, the document needs to be archived in ecoDMS as a new file.
   >   – If the "Finalise document" checkbox is NOT ticked, the document can subsequently be opened through version control, edited, and filed as a new version.

6. Archive the emails with "OK" or abort the process with "Cancel".

   > – The file is saved in ecoDMS in the PDF/A format and displays in the preview
   > – In addition, the original file is archived as a new version for the PDF/A in ecoDMS
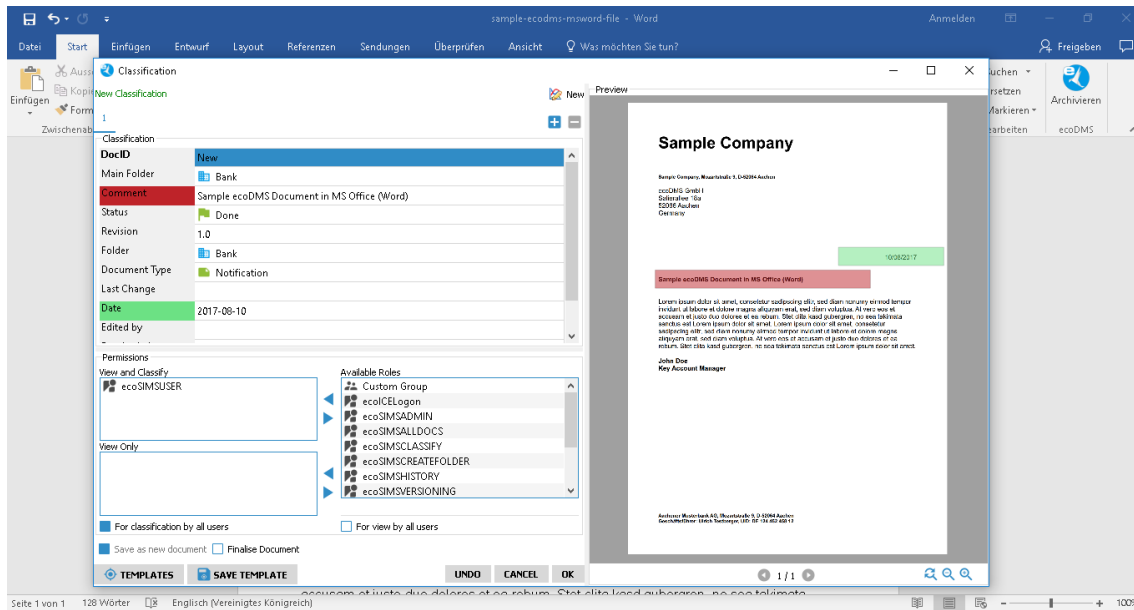
29.3 Re-Archive Document

You can open the original file of an archived Office file from ecoDMS and store it again as a new document.

1. Open an original file from the "Version Management" in ecoDMS

2. Make your changes in Office

3. Select one of the following function calls for archiving
   a) Office toolbar -> ecoDMS Icon (Archive)
   b) Office menu -> ecoDMS -> Archive (display depends on the MS Office version)

4. Archiving is prepared
   a) If you are connected to the Connection Manager using several profiles, ecoDMS prompts you to select the target profile for archiving

5. The existing classification is loaded

> – You can adapt the classification for the new document accordingly

6. Enable the "Save as new document" function in the classification dialogue

> – The file is then archived in ecoDMS not as a new version but as a new document
> – In this case ecoDMS applies any changes in the classification to the new document. The classification of the "original version" remains unchanged
> – If you tick the "Finalise document" checkbox, you cannot make changes to the document after archiving
> – If the "Finalise document" checkbox is NOT ticked, the document can subsequently be opened through version control, edited, and filed as a new version

7. Archive the emails with "OK" or abort the process with "Cancel".

> – The file is saved in ecoDMS in the PDF/A format and displays in the preview
> – In addition, the original file is archived as a new version for the PDF/A in ecoDMS

29.4 Archive Emails from Outlook

Über das MS Office Plugin von ecoDMS können neben den Office-Dokumenten auch ein- und ausgehende E-Mails aus Outlook archiviert werden.

> 1. ecoDMS archives the complete email, including any attachments, in the standard mail format EML.
>   a) This file is archived as a version
> 2. The message content (without attachments) is filed as PDF/A
>   – The PDF/A is displayed in the preview
> 3. If the email contains attachments, they are stored individually in ecoDMS as an attachment to the DocID in the table view
>   a) Attachments are identified with a coloured arrow next to the DocID in the table
> 4. During the archiving process, ecoDMS executes automatic full-text recognition
>   a) This allows the retrieval of email text and readable attachments via the full-text search
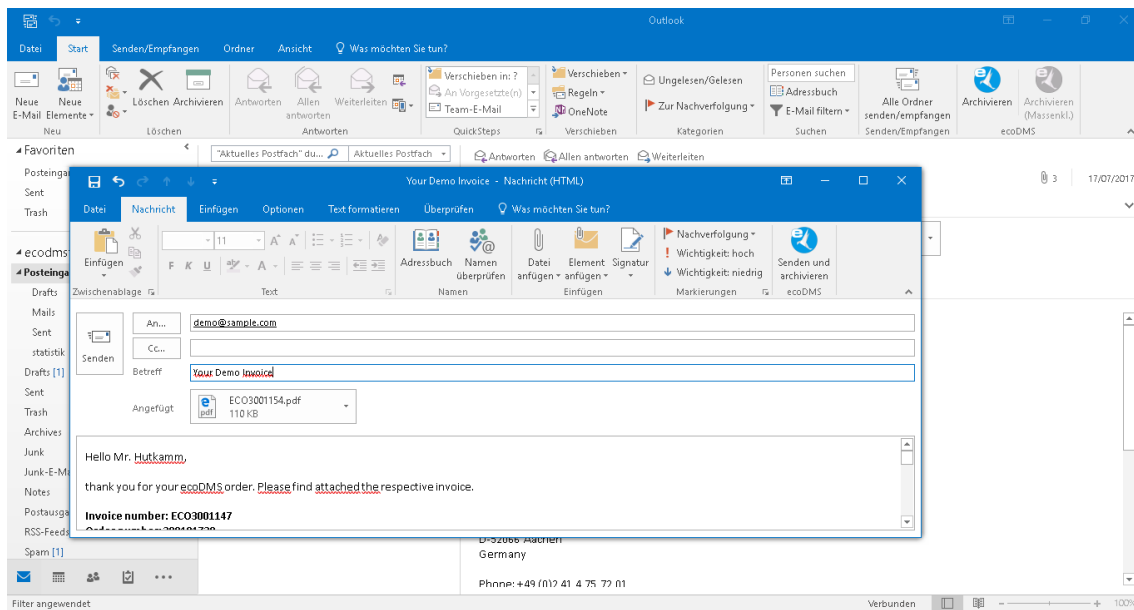
Figure 29.3: MS Office Plugin - Outlook

29.4.1 Send and Archive

You can send outgoing emails and archive them at the same time.

1. Write a message as usual and add attachments as an option

2. Click the "Send and Archive" icon in the Outlook "Message" tab

3. The email is sent and prepared for archiving

   a) If you are connected to the Connection Manager using several profiles, ecoDMS prompts you to select the target profile for archiving

4. The classification dialogue opens

> – You can either fill in the attributes manually, or automatically via a classification template
> – If ecoDMS recognises a template, the programme fills in the matching attributes and highlights them in colour
> – Before archiving, please note the following settings:
>   – If you tick the "Finalise document" checkbox, no further versions can be added to the email
>   – If you do NOT tick the "Finalise document" checkbox, you can add further versions the email in ecoDMS

5. Archive the email with "OK" or abort the process with "Cancel"

> – The message content is saved in ecoDMS in the PDF/A format and displays in the preview
> – In addition, an EML file of the email is archived as an initial version for the PDF/A in ecoDMS
> – If the email contains attachments, they are stored individually in ecoDMS as an attachment to the DocID in the table view

Figure 29.4: MS Office Plugin - Outlook - Send and Archive Email

29.4.2 Archive Single Email

To archive an entire email (incl. attachments), complete the following steps:

1. Select or open the email in Outlook

2. Click the ecoDMS "Archive" icon

3. Archiving is prepared

    a) If you are connected to the Connection Manager using several profiles, ecoDMS prompts you to select the target profile for archiving

4. The classification dialogue opens

> – You can either fill in the attributes manually, or automatically via a classification template
> – If ecoDMS recognises a template, the programme fills in the matching attributes and highlights them in colour
> – Before archiving, please note the following settings:
>   – If you tick the "Finalise document" checkbox, no further versions can be added to the email
>   – If you do NOT tick the "Finalise document" checkbox, you can add further versions the email in ecoDMS

5. Archive the email with "OK" or abort the process with "Cancel"

> – The message content is saved in ecoDMS in the PDF/A format and displays in the preview
> – In addition, an EML file of the email is archived as an initial version for the PDF/A in ecoDMS
> – If the email contains attachments, they are stored individually in ecoDMS as an attachment to the DocID in the table view

Figure 29.5: MS Office Plugin - Outlook - Archive Email

29.4.3 Archive Several Emails Consecutively

You can archive several emails consecutively. The emails are classified individually, one after the other. To archive several emails consecutively, complete the following steps

1. Highlight the emails in Outlook (hold down the CTRL key for multiple selection)

2. Click the ecoDMS "Archive" icon

3. Archiving is prepared

   a) If you are connected to the Connection Manager using several profiles, ecoDMS prompts you to select the target profile for archiving

4. The classification dialogue is opened for each email, i.e. one after the other

> – You can either fill in the attributes manually, or automatically via a classification template
> – If ecoDMS recognises a template, the programme fills in the matching attributes and highlights them in colour
> – Before archiving, please note the following settings:
>   – If you tick the "Finalise document" checkbox, no further versions can be added to the email
>   – If you do NOT tick the "Finalise document" checkbox, you can add further versions the email in ecoDMS

5. Archive the emails with "OK" or abort the process with "Cancel"

> – The message content is saved in ecoDMS in the PDF/A format and displays in the preview
> – In addition, an EML file of the email is archived as an initial version for the PDF/A in ecoDMS
> – If the email contains attachments, they are stored individually in ecoDMS as an attachment to the DocID in the table view
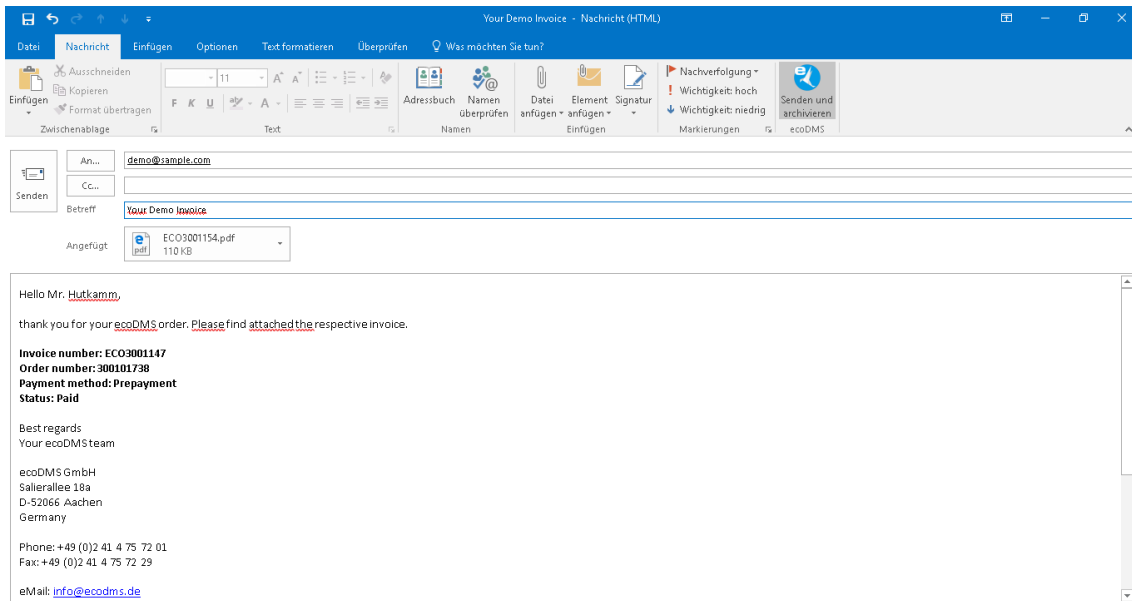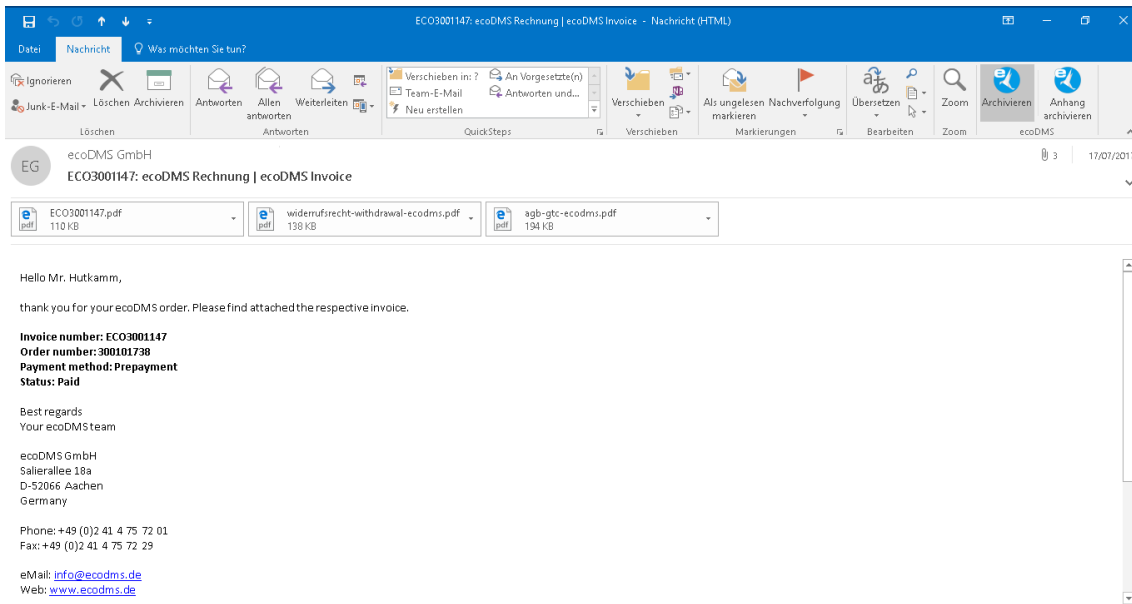
29.4.4 Archive Several Emails Simultaneously (Mass Classification)

You can archive several emails simultaneously. In this case, ecoDMS performs mass classification for all selected messages and all files receive the same classification. The emails are saved in ecoDMS complete with attachments. To archive several emails with mass classification, complete the following steps:

1. Highlight the emails in Outlook (hold down the CTRL key for multiple selection)

2. Click the ecoDMS "Archive (Mass Classification)" icon

3. Archiving is prepared

    a) If you are connected to the Connection Manager using several profiles, ecoDMS prompts you to select the target profile for archiving

4. Classification is now performed as mass classification

    a) A mass classification classifies several emails simultaneously with the same information.

    b) For mass classification, only fill in the fields that you want to classify for all documents. All other classification attributes are not overwritten.

5. Archive the emails with "OK" or abort the process with "Cancel"

    – Each email is saved individually in ecoDMS
    – The message content is saved in ecoDMS in the PDF/A format and displays in the preview
    – In addition, an EML file of the email is archived as an initial version for the PDF/A in ecoDMS
    – If the email contains attachments, they are stored individually in ecoDMS as an attachment to the DocID in the table view
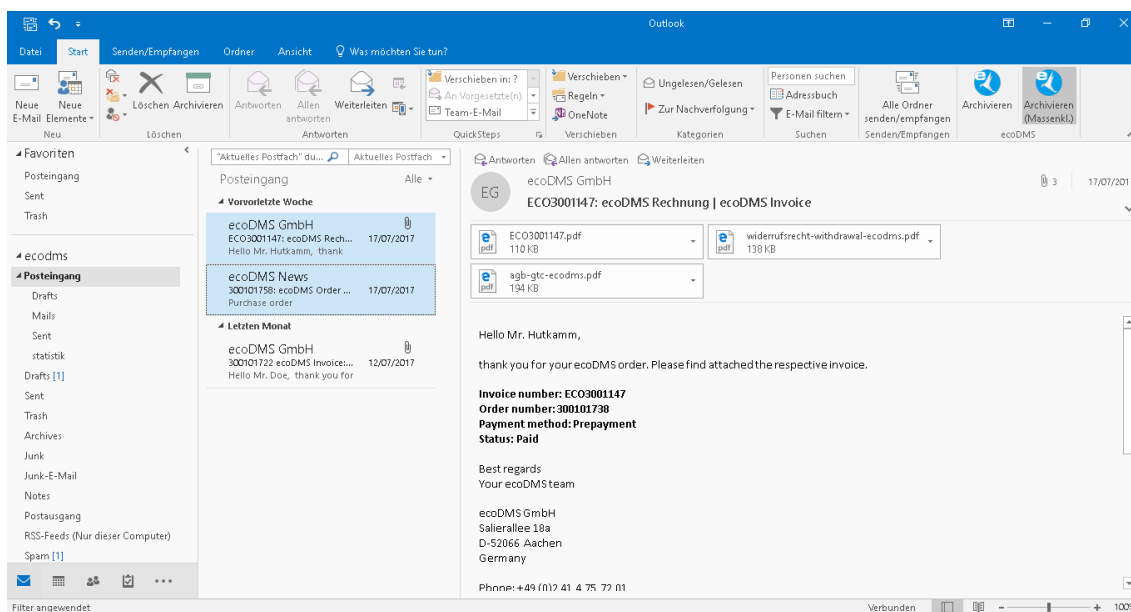

Figure 29.6: MS Office Plugin - Outlook - Archive Several Email with Mass Classification

29.4.5 Archive Attachments

You can archive email attachments in ecoDMS independently, without the message. Classification can be performed individually for each attachment or uniformly as mass classification for all attachments. If the attachments are readable files, ecoDMS automatically creates a full-text index.

1. Open the email in Outlook

2. Click the ecoDMS "Archive Attachment" icon

3. If there are several attachments, you can now select which files you want to archive

> – In this selection dialogue, enable the "Mass Classification" function for uniform classification of all selected files
>
> – For mass classification, only fill in the fields that you want to classify for all documents. All other classification attributes are not overwritten
>
> – Otherwise, all selected attachments are classified consecutively

4. Archiving is prepared

   a) If you are connected to the Connection Manager using several profiles, ecoDMS prompts you to select the target profile for archiving

5. The classification dialogue opens according to your selection

   a) Either for each document individually, i.e. consecutively

   b) Or in form of a dialogue for mass classification of all files

6. Archive the attachments with "OK" or abort the process with "Cancel"

> – Each file is saved individually in ecoDMS
>
> – The attachment is archived in its original format
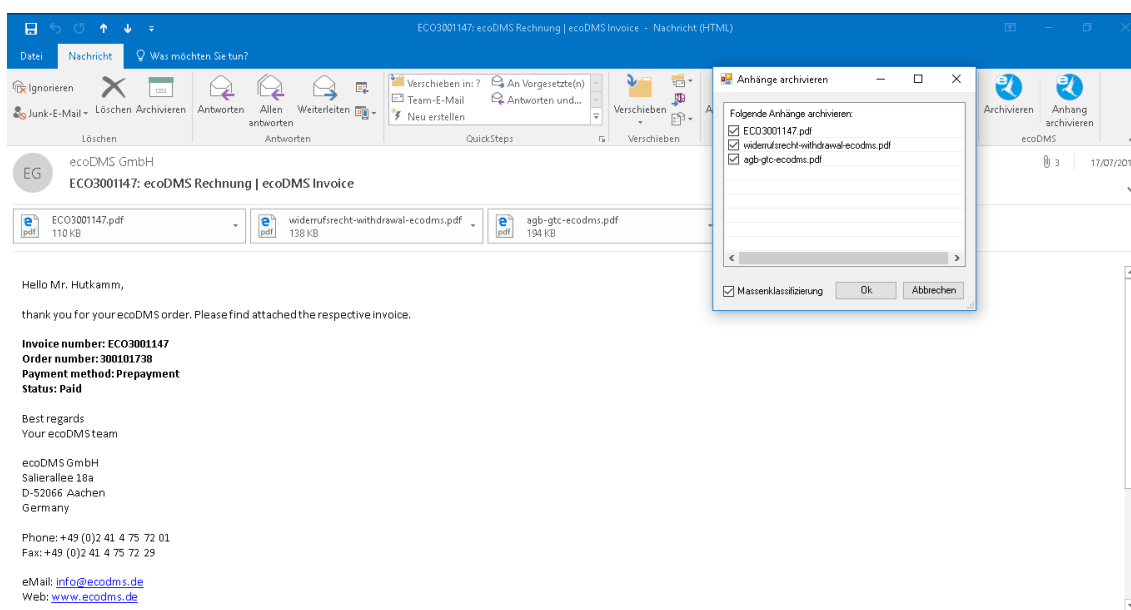
Figure 29.7: MS Office Plugin - Outlook - E-Mail-Anhänge archivieren

Important Information for Chapter 29

[1] *Diese Funktion setzt eine Lizenz der ecoDMS-Vollversion voraus, kann aber in der Demozeit getestet werden und wird anschließend automatisch deaktiviert, bis eine Lizenz eingespielt wird.*

[2] *Diese Funktion setzt zur Ansicht und Nutzung bestimmte System-Berechtigungen voraus.*

[3] *Voraussetzung zur Verwendung dieses Plugins ist die Installation der aktuellsten Software-Komponenten von ecoDMS Server, ecoDMS Client und ecoDMS PDF/A Drucker.*

30 Thunderbird Plugin

Use the ecoDMS Thunderbird plugin to archive incoming and outgoing emails from Thunderbird.

1. ecoDMS archives the complete email, including any attachments, in the standard mail format EML.
   a) This file is archived as a version

2. The message content (without attachments) is filed as PDF/A
   – The PDF/A is displayed in the preview

3. If the email contains attachments, they are stored individually in ecoDMS as an attachment to the DocID in the table view
   a) Attachments are identified with an arrow next to the DocID

4. During the archiving process, ecoDMS executes automatic full-text recognition
   a) This allows the retrieval of email text and readable attachments via the full-text search

5. The ecoDMS Thunderbird plugin does not generate PDF/A files for macOS. Only the original email is deposited as an EML file. This is not an error in ecoDMS: https://bugzilla.mozilla.org/show_bug.cgi?id=675709

6. The prerequisite for using this plugin is the installation of the current software components of: ecoDMS Server, ecoDMS Client and ecoDMS PDF/A Printer
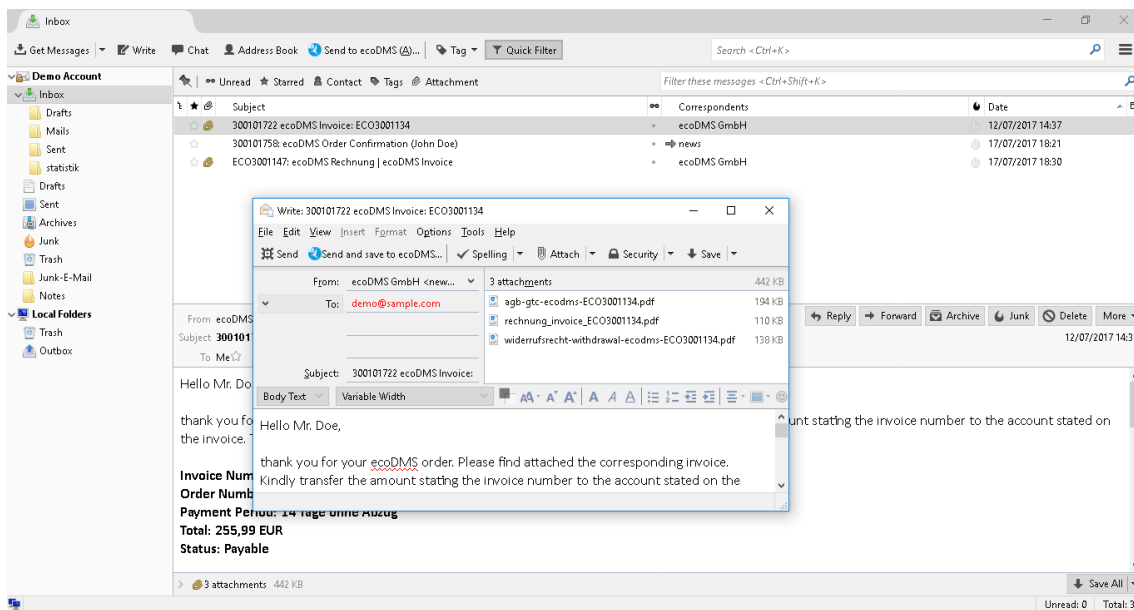

Figure 30.1: Thunderbird Plugin

30.1 Send and Archive

You can send outgoing emails and archive them at the same time.

1. Write a message as usual and add attachments as an option

2. Click the "Send and Archive" icon in Thunderbird

3. The email is sent and prepared for archiving

    a) If you are connected to the Connection Manager using several profiles, ecoDMS prompts you to select the target profile for archiving

4. The classification dialogue opens

> – You can either fill in the attributes manually, or automatically via a classification template
> – If ecoDMS recognises a template, the programme fills in the matching attributes and highlights them in colour
> – Before archiving, please note the following settings:
>   – If you tick the "Finalise document" checkbox, no further versions can be added to the email
>   – If you do NOT tick the "Finalise document" checkbox, you can add further versions the email in ecoDMS

5. Archive the email with "OK" or abort the process with "Cancel"

> – The message content is saved in ecoDMS in the PDF/A format and displays in the preview
> – In addition, an EML file of the email is archived as an initial version for the PDF/A in ecoDMS
> – If the email contains attachments, they are stored individually in ecoDMS as an attachment to the DocID in the table view

Figure 30.2: Thunderbird Plugin - Send and Archive Email

30.2 Archive Single Email

To archive an entire email (incl. attachments), complete the following steps:

1. Select or open the email in Thunderbird

2. Click the ecoDMS icon "Archive (ecoDMS)"

3. Archiving is prepared

    a) If you are connected to the Connection Manager using several profiles, ecoDMS prompts you to select the target profile for archiving

4. The classification dialogue opens

– You can either fill in the attributes manually, or automatically via a classification template

– If ecoDMS recognises a template, the programme fills in the matching attributes and highlights them in colour

– Before archiving, please note the following settings:

– If you tick the "Finalise document" checkbox, no further versions can be added to the email

– If you do NOT tick the "Finalise document" checkbox, you can add further versions the email in ecoDMS

5. Archive the email with "OK" or abort the process with "Cancel"

– The message content is saved in ecoDMS in the PDF/A format and displays in the preview

– In addition, an EML file of the email is archived as an initial version for the PDF/A in ecoDMS

– If the email contains attachments, they are stored individually in ecoDMS as an attachment to the DocID in the table view
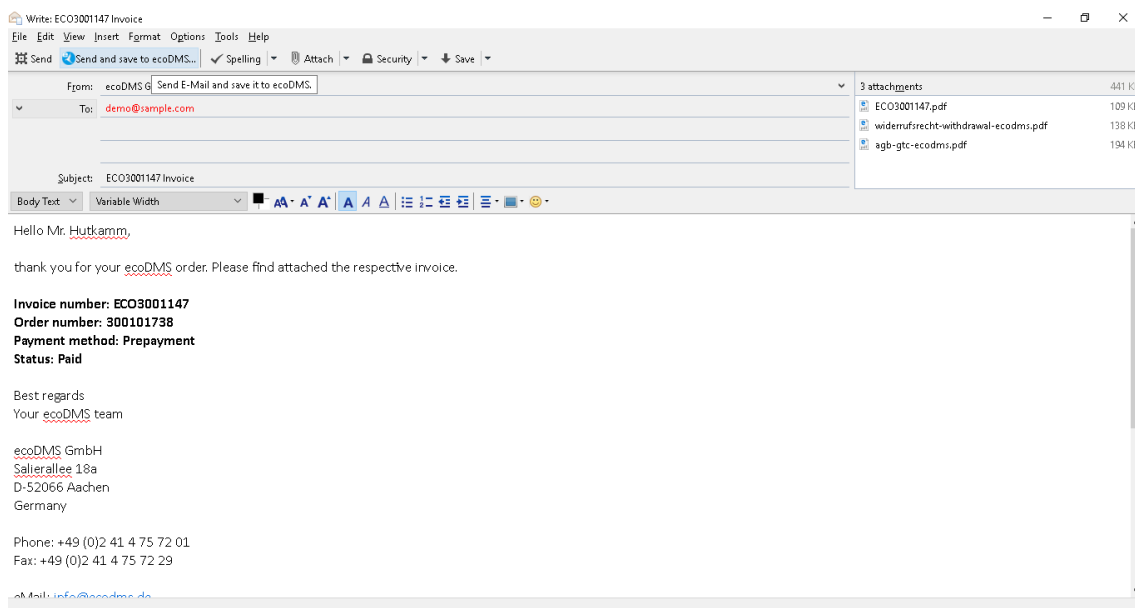

Figure 30.3: Thunderbird Plugin - Fully Archive Email

30.3 Archive Several Emails Consecutively

You can archive several emails consecutively. The emails are classified individually, one after the other. To archive several emails consecutively, complete the following steps:

1. Highlight the emails in Thunderbird (hold down the CTRL key for multiple selection)

2. Click the ecoDMS icon "Archive (ecoDMS)"

3. Archiving is prepared

   a) If you are connected to the Connection Manager using several profiles, ecoDMS prompts you to select the target profile for archiving

4. The classification dialogue is opened for each email, i.e. one after the other

> – You can either fill in the attributes manually, or automatically via a classification template
> – If ecoDMS recognises a template, the programme fills in the matching attributes and highlights them in colour
> – Before archiving, please note the following settings:
>   – If you tick the "Finalise document" checkbox, no further versions can be added to the email
>   – If you do NOT tick the "Finalise document" checkbox, you can add further versions the email in ecoDMS

5. Archive the emails with "OK" or abort the process with "Cancel".

> – The message content is saved in ecoDMS in the PDF/A format and displays in the preview
> – In addition, an EML file of the email is archived as an initial version for the PDF/A in ecoDMS
> – If the email contains attachments, they are stored individually in ecoDMS as an attachment to the DocID in the table view
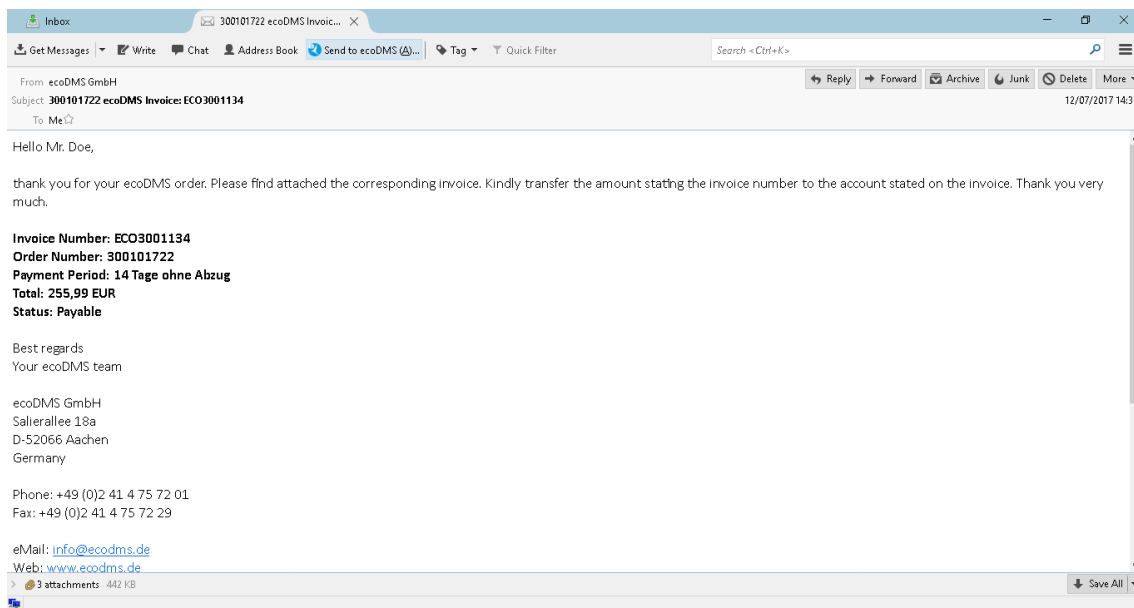
30.4 Archive Attachments

You can archive email attachments in ecoDMS independently, without the message. If there are several attachments, you can archive them all at once in ecoDMS. Each attachment is classified individually. If the attachments are readable files, ecoDMS automatically creates a full-text index.

1. Open the email in Thunderbird

2. Expand the "Attachments" window

3. If there are several attachments, you can now select which files you want to archive

> – Right-click the heading "x Attachments" -> Archive Attachments (ecoDMS) to classify and archive all attachments subsequently
> – Right-click a single attachment -> Archive Attachment (ecoDMS) to classify and archive only this attachment

4. Archiving is prepared
   a) If you are connected to the Connection Manager using several profiles, ecoDMS prompts you to select the target profile for archiving

5. The classification dialogue opens subsequently for each attachment

6. Archive the attachments with "OK" or abort the process with "Cancel"

> – Each file is saved individually in ecoDMS
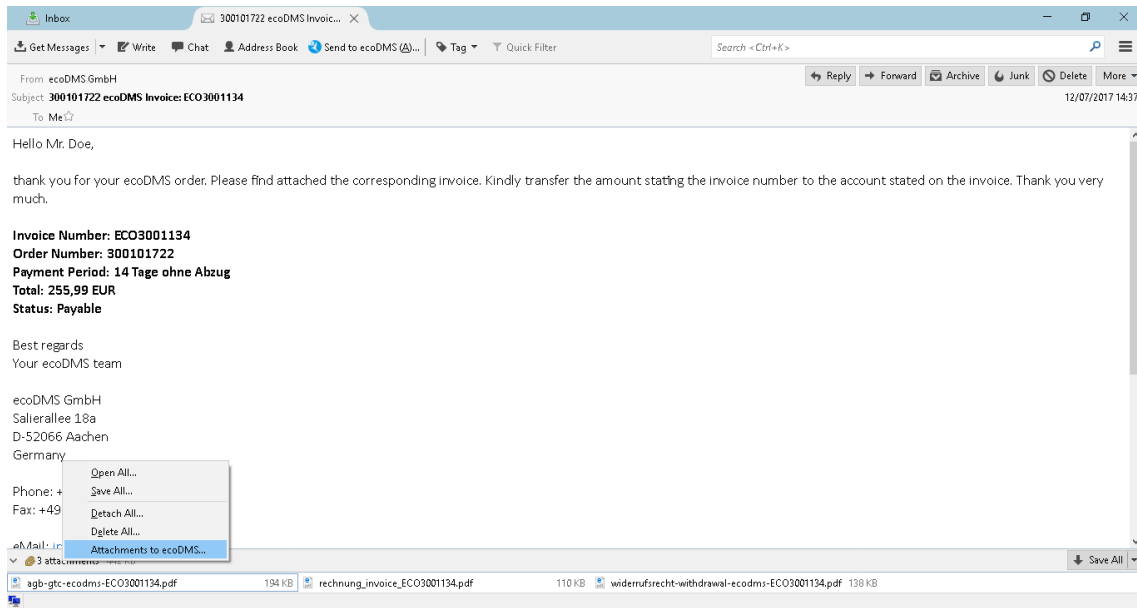> – The attachment is archived in its original format

Figure 30.4: Thunderbird Plugin - Archive All Email Attachments

31 ecoMAILZ Plugin (1.0.2) for ecoDMS Version 18.09 (apu)

Connect the ecoMAILZ Email Archive with the ecoDMS Document Management System. Benefit from the numerous advantages of a central storage location for all your emails, documents and data. This chapter describes the specific functions for ecoDMS in ecoMAILZ.

> - **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 on your local device according to the official ecoMAILZ installation manual.
> - Read the ecoMAILZ installation manual to set up the connection.
> - All ecoMAILZ Email options with the exception of the Read Aloud function are also available in the Plugin.
> - Please refer to the respective section in the chapter "Email Options" in the ecoMAILZ manual about how to use the standard functions (Email options).
> - This chapter will focus on the functions in ecoMAILZ that are specific to ecoDMS.
> - The Plugin interface is similar to the ecoDMS Web Client.
> - Users can only see the emails intended for them according to the permissions configured in the ecoMAILZ user management.
> - General settings, such as the configuration of adapters, users, etc., can only be made by an administrator via the ecoMAILZ Web Client.

31.1 Search & Filters

You can use the full-text search in the ecoMAILZ Web Client and in ecoDMS Client via the Plugin.

- If you want to search for documents in ecoDMS and simultaneously search for Emails in ecoMAILZ, you can enter the search terms in the full-text search box of ecoDMS.
  - In this case the search request applies to the ecoDMS documents and the ecoMAILZ messages (refer to screen shot).
- If you exclusively want to search for emails within the plugin, enter your search terms in the ecoMAILZ search box.
  - The familiar filters (status, period, attachment) are also available.
- You can also use the ecoMAILZ standard full-text search commands for your search.
- For more details on the ecoMAILZ search functions, refer to the chapter "Search & Filters" in this manual.
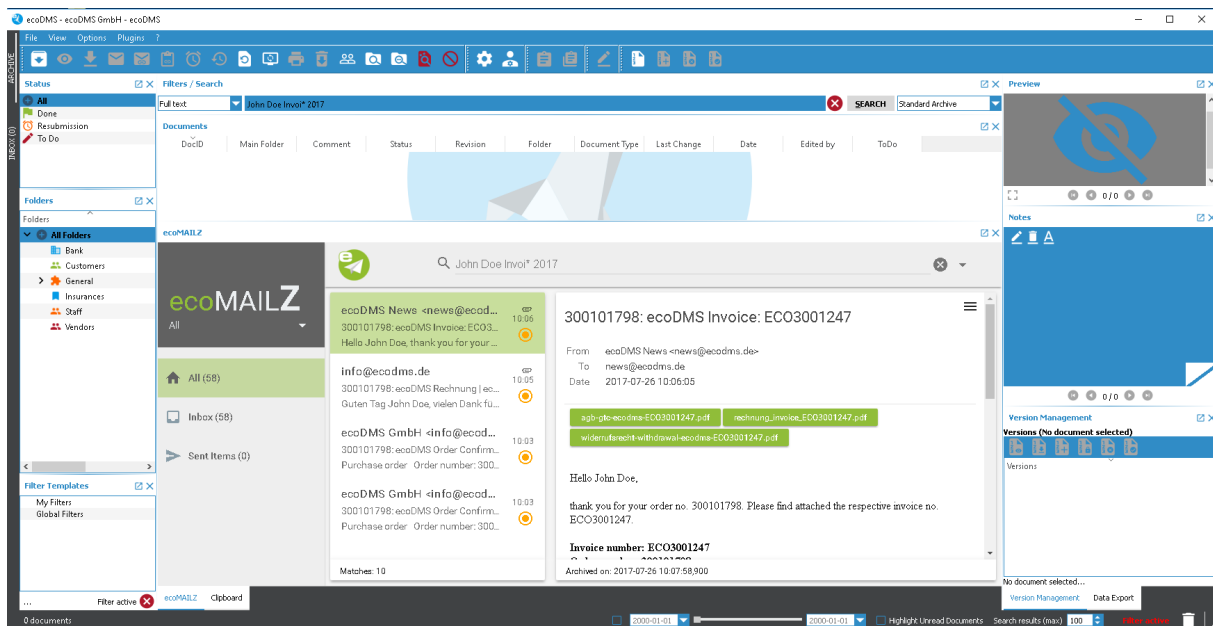
Figure 31.1: ecoMAILZ Plugin in ecoDMS Version 18.09 - Search Functions (Full Text in ecoDMS & ecoMAILZ)

31.2 Copy to ecoDMS (Archiving in ecoDMS)

- The "Copy to ecoDMS" function enables users to archive complete emails (EML files), including attachments, in ecoDMS. ecoDMS stores the email including any attachments in the standard EML mail format.
- In addition, the message and its attachments are stored in a bundled PDF/A-3 file.
    - **PDF/A-3-format:** You can embed any file type in PDF/A-3. For example, you can add Email attachments such as PDF or Office files to a PDF/A-3 document. Thus, if you open a PDF/A-3 file, it contains the plain Email text in PDF format and the attachments.
    - You can retrieve and open the PDF/A-3 file in the table view and card view of ecoDMS.
    - In addition, the PDF/A-3 file is displayed in the preview window of ecoDMS.
- If the email contains attachments, they are stored individually in ecoDMS as an attachment to the DocID in the table view.
- During the archiving process, ecoDMS executes automatic full-text recognition. This allows the retrieval of Email texts and readable attachments via the full-text search.

You can copy your Emails - individually, if required - to ecoDMS via the Plugin. To copy the entire email to ecoDMS and archive it, complete the following steps:

1. Start ecoDMS Client.

2. Select the email in the "ecoMAILZ" window.

3. Click the menu icon in the message. The icon is located at the top right of the main window of the displayed Email.

4. Select the "Copy to ecoDMS" function.

5. the email is prepared for archiving and the classification dialogue box of ecoDMS opens.

6. Enter the classification information for archiving in ecoDMS.

a) ecoDMS displays the PDF of your message in the preview window of the classification dialogue box.
b) For more information on classification and the general operation of ecoDMS, refer to the ecoDMS manual.

7. Confirm the classification and the associated archiving process in ecoDMS in the classification dialogue box with "OK".
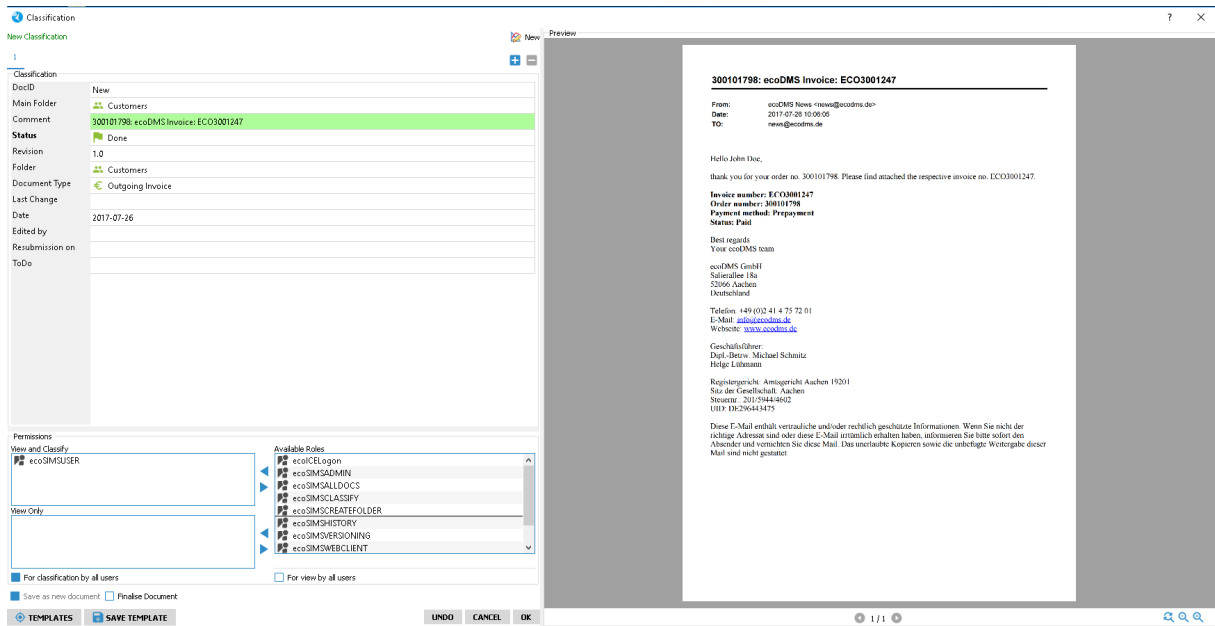

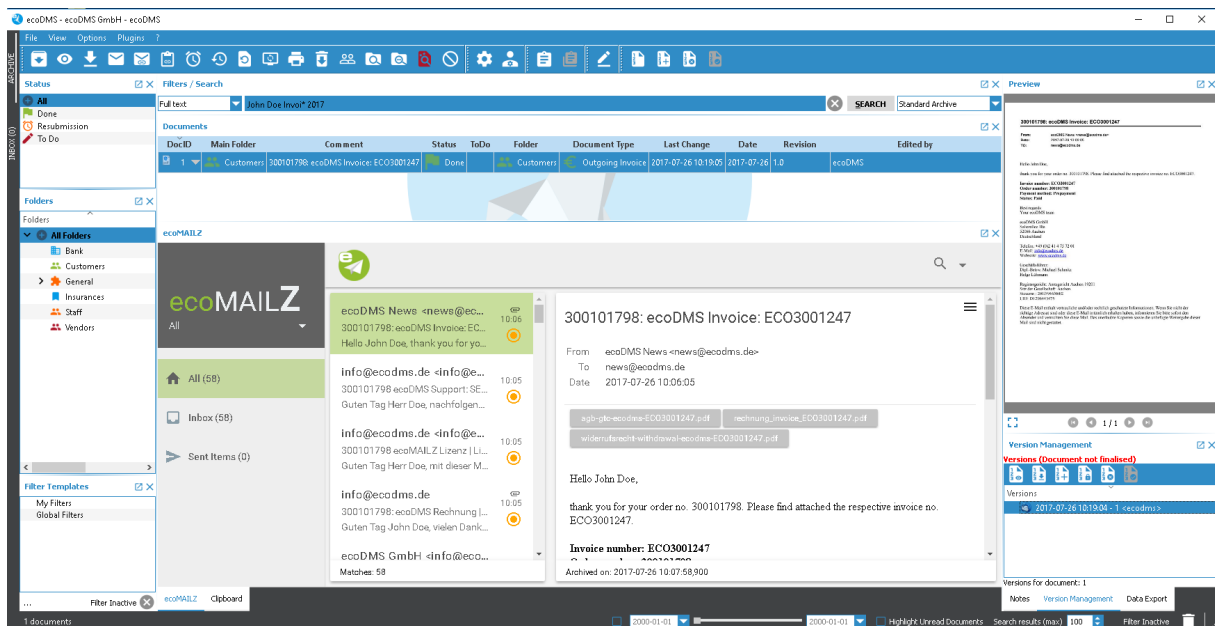Figure 31.2: ecoMAILZ Plugin in ecoDMS Version 18.09 - Classifying and Archiving an Email

Figure 31.3: ecoMAILZ Plugin in ecoDMS Version 18.09 - Archived Email in ecoDMS Including Preview & Version Management

31.3 Download

To download an entire Email, complete the following steps:

1. Start ecoDMS Client.

2. Select the email in the "ecoMAILZ" window.

3. Click the menu icon in the message. The icon is located at the top right of the main window of the displayed Email.

4. Select the "Download" function.

5. The entire message is downloaded as EML file and saved to the default folder for downloads.

6. The following options are available in the dialogue box that displays:

   a) **Open:** Click the "Open" button to open the original file with the default programme for this file format. This is usually the default Email client.

   – If the message is already in the download folder, this button is greyed out and cannot be clicked.

   b) **Copy to ecoDMS:** Click the "Copy to ecoDMS" button to archive the original file of the selected Email in ecoDMS. The classification dialogue box opens. Enter the classification information for archiving in ecoDMS.

   – In the preview of the classification dialogue box, ecoDMS does not display a preview (no PDF).
   – This process only archives the EML file including any attachments (no PDF).
   – A preview and a PDF/A-3 file are only created with the direct function call "Copy to ecoDMS" in the email menu of the message.
   – For more information on classification and the general operation of ecoDMS, refer to the ecoDMS manual.

   c) **Show Download Folder:** Click the "Show Download Folder" button to open the folder in the file system.

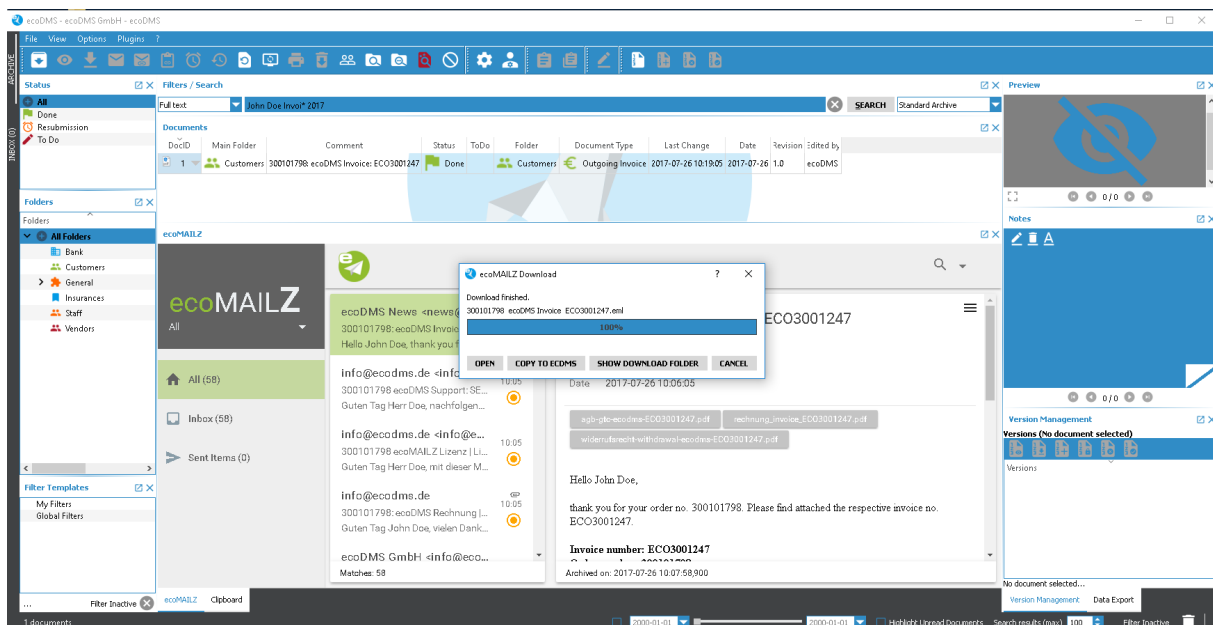   d) **Cancel:** If you do not want to execute any of the above-mentioned options, click "Cancel".

Figure 31.4: ecoMAILZ Plugin in ecoDMS Version 18.09 - Download (Complete Email as EML File)

31.4 Download (PDF)

To download an Email with its attachments as PDF/A3 file, complete the following steps:

1. Start ecoDMS Client.

2. Select the email in the "ecoMAILZ" window.

3. Click the menu icon in the message. The icon is located at the top right of the main window of the displayed Email.

4. Select the "Download (PDF)" function.

5. The message and any attachments are converted to PDF/A-3 format, downloaded and stored in the default target folder for downloads.

   a) This process may take a while depending on the file content and size.

6. The following options are available in the dialogue box that displays:

   a) **Open:** Click the "Open" button to open the PDF/A-3 file with the default programme for this file format.

   > If the message is already in the download folder, this button is greyed out and cannot be clicked.

   b) **Copy to ecoDMS:** Click the "Copy to ecoDMS" button to archive the EML file of the selected Email in ecoDMS. The classification dialogue box opens. Enter the classification information for archiving in ecoDMS.

   > – In the preview of the classification dialogue box, ecoDMS displays a preview.
   > – This process only archives the PDF file.
   > – For more information on classification and the general operation of ecoDMS, refer to the ecoDMS manual.

   c) **Show Download Folder:** Click the "Show Download Folder" button to open the folder in the file system.

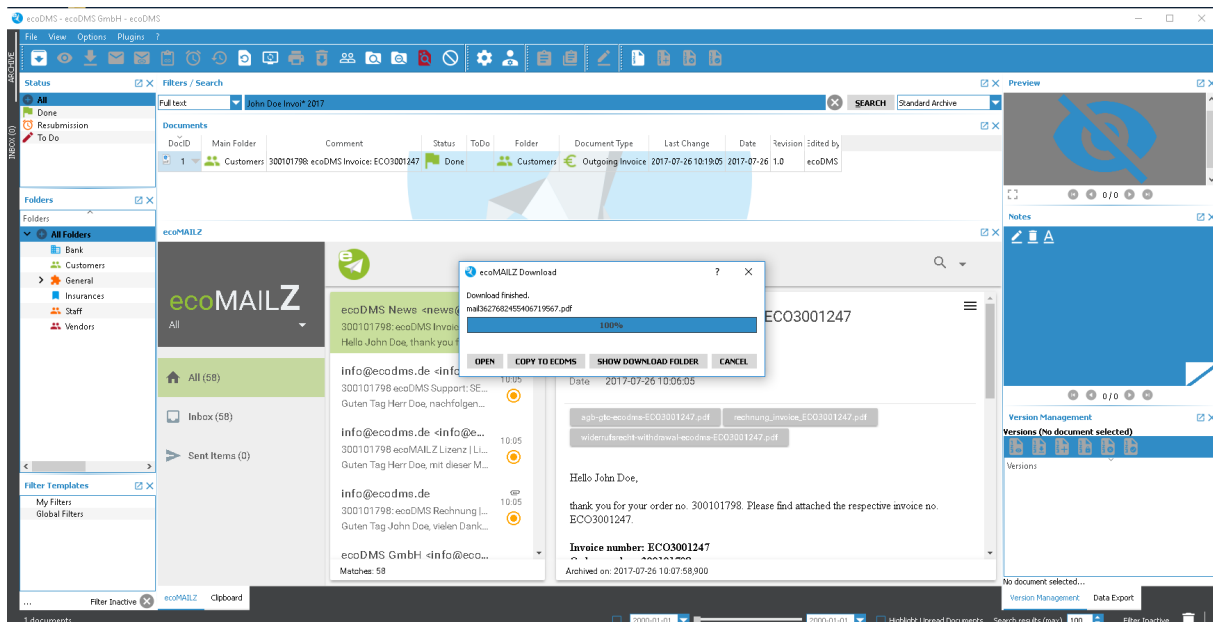   d) **Cancel:** If you do not want to execute any of the above-mentioned options, click "Cancel".

Figure 31.5: ecoMAILZ Plugin in ecoDMS Version 18.09 - Download (Email as PDF/A-3 File)

32 ecoDMS Server

Being a client-server system, ecoDMS saves all settings, user data and classifications in a database. The archived files and documents are stored safely encoded in containers within the user's ecoDMS server. Spreading information across containers and a database offers more security and flexibility when managing data.

- **postgreSQL Database**
  - Being a client-server system, ecoDMS saves all settings, user data and classifications in a database. We use the free, cross-platform postgreSQL component as a database. In contrast to most other databases, the database volume of postgreSQL is virtually unlimited. As postgreSQL is an open source database, there is no additional cost for using this database.
- **Container Storage System**
  - The archived files and documents are stored safely encoded in containers within the user's ecoDMS server. The default data volume of such a container is approx. 500 MB. This is a fixed value specified by ecoDMS. As soon as the data volume is reached, the system automatically creates a new container. The "full" container, of course, will continue to exist. The maximum number of containers is unlimited in ecoDMS. The automatic generation of different containers makes data backup much easier. During the backup process the containers can be backed up separately and independent of the postgreSQL database.

32.1 Stop ecoDMS Server

This chapter describes how ecoDMS Server can be stopped if necessary.

32.1.1 Windows

To stop the server under Ubuntu / Debian, complete the following steps:

1. Make sure that no other users are working with ecoDMS or are connected to ecoDMS Server.
   a) First, exit all Connection Managers connected to the server.
   b) Check and close all other connections to the server (e.g. web client...).
2. Open the "Services" manager of your windows system.
3. Select the service "ecoDMS Server 18.09".
4. Click "Stop the service".
   a) The server is stopped (this may take some time).
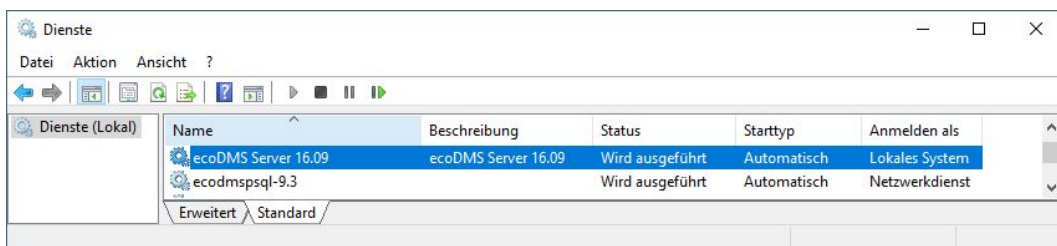

Figure 32.1: Windows - Services (16.09)

32.1.2 Linux

This chapter describes how ecoDMS Server can be started if necessary.

1. Make sure that no other users are working with ecoDMS or are connected to ecoDMS Server.
    a) First, exit all Connection Managers connected to the server.
    b) Check and close all other connections to the server (e.g. web client...).

2. Open the console.

3. Stop the server with the following command:

```
sudo service ecodms stop
```

32.2 Start ecoDMS Server

This chapter describes how ecoDMS Server can be started when needed.

32.2.1 Windows

To (re)start the server under Windows, complete the following steps:

1. Make sure that no other users are working with ecoDMS or are connected to ecoDMS Server.
    a) First, exit all Connection Managers connected to the server.
    b) Check and close all other connections to the server (e.g. web client...).

2. Open the "Services" manager of your windows system.

3. Select the service "ecoDMS Server 18.09".

4. Click "Start" to start the service.
    a) The server is started (this may take some time).

5. If the operation was successful, you can reconnect the Connection Manager and all other connections to ecoDMS Server.
    a) Please note that depending on the computer, the server might need some time until it is completely booted and the connection is established.
    b) Please wait a few minutes and then try to connect to the server.
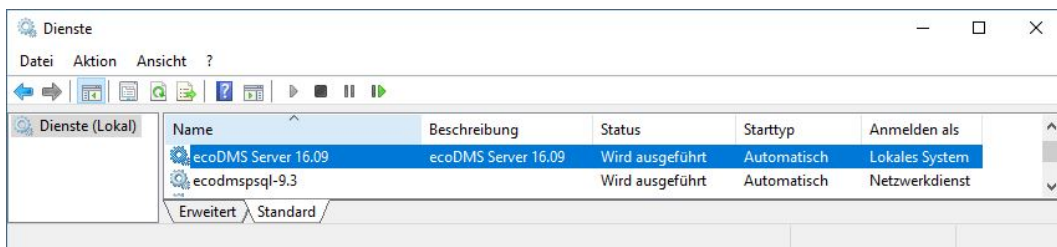

Figure 32.2: Windows - Services (18.09)

32.2.2 Linux

To start the server under Ubuntu / Debian, complete the following steps:

1. Make sure that no other users are working with ecoDMS or are connected to ecoDMS Server.
    a) First, exit all Connection Managers connected to the server.

b) Check and close all other connections to the server (e.g. web client...).

2. Open the console.

3. Start the server with the following command:

```
sudo service ecodms start
```

4. f the operation was successful, you can reconnect the Connection Manager and all other connections to ecoDMS Server.

a) Please note that depending on the computer, the server might need some time until it is completely booted and the connection is established. Please wait a few minutes and then try to connect to the server.

33 Login Credentials

This chapter contains information about the initial login credentials for ecoDMS.

33.1 Default User

The default user is created automatically when you first install ecoDMS. This user is allowed to...

- – administer the system.
- – archive and classify documents.
- – use version management.
- – use the inbox.
- – view the document history.
- – create new folders.
- – use the web interface.
- – use template management.
- – erase documents.

The login credentials for the default user (if the password has not been changed) are:
- – User name: ecodms
- – Password: ecodms

For security reasons, this password should be changed immediately after login.
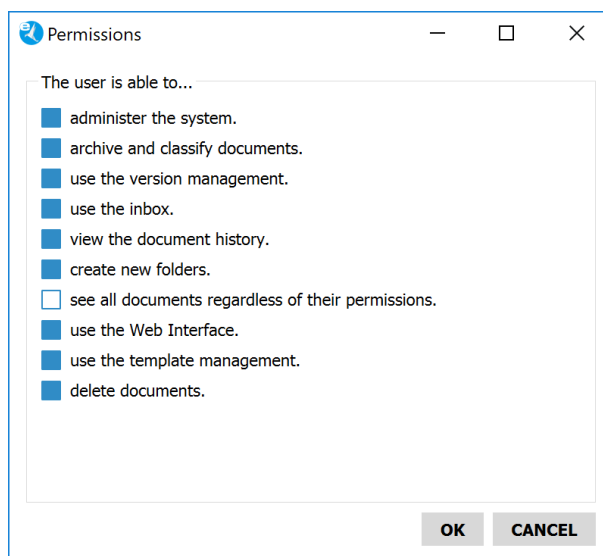

Figure 33.1: Permissions Default User

33.2 System Administrator

Besides the automatically generated user (default user) there is also a so-called system administrator. This user is for system configuration only. The system administrator thus has the permission to make system settings and add more users. This user is not able to archive, view and/or classify documents.

> – User name: ecoSIMSAdmin
> – Password: ecoSIMSAdmin
>
> For security reasons, this password should be changed immediately after login.

33.3 PostgreSQL Database

If postgreSQL is installed with ecoDMS installer, the following user information is used for the database:

> – User name: postgres
> – Password: postgres

If there is already a matching postgreSQL version available because, for example, the database was installed manually, the login credentials that was assigned during the installation of postgreSQL applies.

33.4 Scaninput Folder (Linux Distributions)

The scaninput folder is a Samba share. When installing ecoDMS Server on a Linux distribution, a default user is created to do so. As an option, you can also enter any other user created in the Linux system. Use the following login credentials for the default user:

> – User name: dmsscanner
> – Password: dmsscanner