ecoDMS

INSTALLATION

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Contents

1 System Requirements **5**

2 Windows **6**
2.1 Upgrade . . . 6
2.2 Installation . . . 7
2.2.1 AllInOne Installer . . . 7
2.2.2 ecoDMS Server . . . 9
2.2.3 ecoDMS Client . . . 16
2.2.3.1 Silent Install: ecoDMS Client . . . 20
2.2.4 ecoDMS Printer . . . 21
2.2.4.1 Silent Install: ecoDMS Printer . . . 25
2.3 Uninstall . . . 25
2.3.1 ecoDMS Server . . . 27
2.3.2 ecoDMS Client . . . 30
2.3.3 ecoDMS Printer . . . 32

3 Linux **34**
3.1 Upgrade . . . 34
3.1.1 Upgrade under Linux . . . 35
3.2 Installation . . . 35
3.2.1 Install Editor . . . 35
3.2.2 apt Sources . . . 36
3.2.3 ecoDMS Server . . . 37
3.2.4 ecoDMS Client . . . 38
3.2.5 ecoDMS Printer . . . 38
3.3 Uninstall . . . 39
3.3.1 ecoDMS Server . . . 39
3.3.2 ecoDMS Client . . . 40
3.3.3 ecoDMS Printer . . . 40

4 NAS **41**
4.1 Upgrade and Update . . . 41
4.1.1 Upgrade on a NAS . . . 42
4.1.2 Update on a NAS . . . 43
4.2 ecoWORKZ . . . 43
4.3 Synology Installation (ecoDMS Server) . . . 43
4.3.1 Create Folder Structure for ecoDMS (Example) . . . 43
4.3.2 Install & Open Docker . . . 45
4.3.3 Search & Install ecoDMS Images . . . 45
4.3.4 Create Container . . . 46
4.3.5 Container Settings . . . 46
4.3.6 Configure Mount Paths . . . 48
4.3.7 Change Language (English) . . . 50
4.3.8 Start Container . . . 51
4.4 QNAP Installation (ecoDMS Server) . . . 52
4.4.1 Create Folder Structure for ecoDMS (Example) . . . 52
4.4.2 Install & Open ContainerStation . . . 53
4.4.3 Search & Install ecoDMS Images . . . 53
4.4.4 Container Settings . . . 54
4.4.5 Configure Mount Paths . . . 55
4.4.6 Change Language (English) . . . 56

4.4.7 Start Container . . . 56

5 macOS 58
5.1 Upgrade . . . 58
5.2 Installation . . . 58
5.2.1 ecoDMS Client . . . 58
5.3 Uninstall . . . 62
5.3.1 ecoDMS Client . . . 62

6 Login 63

7 Plugins, Add-ons 64
7.1 Installation . . . 64
7.1.1 Microsoft Office Add-in (2.1.2) | Windows . . . 64
7.1.2 Libre- + OpenOffice Add-on (1.0.6)| Windows, Linux, macOS . . . 68
7.1.2.1 Java Activation . . . 68
7.1.2.2 Install Add-on . . . 69
7.1.3 Thunderbird Add-on (3.0.3)| Windows, Linux, macOS . . . 70
7.1.4 ecoMAILZ Plugin (1.0.3) for ecoDMS (burns) | Windows . . . 72
7.1.5 ecoMAILZ Plugin (1.0.3) for ecoDMS (burns) | Linux . . . 75
7.2 Uninstall . . . 77
7.2.1 Microsoft Office Add-in (2.1.2) | Windows . . . 77
7.2.2 Libre- + OpenOffice Add-on (1.0.6)| Windows, Linux, macOS . . . 78
7.2.3 Thunderbird Add-on (3.0.3)| Windows, Linux, macOS . . . 78
7.2.4 ecoMAILZ Plugin (1.0.3) for ecoDMS (burns) | Windows . . . 78
7.2.5 ecoMAILZ Plugin (1.0.3) for ecoDMS (burns) | Linux . . . 79

8 Backup / Restore 80

1 System Requirements

Always read the system requirements before installing the programme. Make sure that your system environment complies with the ecoDMS requirements. If your system does not meet these requirements, we cannot guarantee the smooth and stable operation of our software:

https://www.ecodms.de/index.php/en/ecodms-archive/system-requirements/ecodms-burns

2 Windows

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

2.1 Upgrade

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

Important information about creating a backup before you upgrade:

- Before upgrading, you must create a full and clean backup.
  - The ecoDMS manual contains a detailed description of this process.
- Do not save this backup file in the ecoDMS Server directory!
- Also, before creating a backup, make sure that you create the backup with the latest update of your current ecoDMS version.
  - For example, 18.09-3/1
- We recommend you completely empty the inbox before backing up your data.
  - 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 with the dialogue box which displays.

Important notes about the database:

- When upgrading from ecoDMS version14.08 or 16.09, postgreSQL is upgraded to version 10.X.
- If the database was installed manually for ecoDMS, you cannot upgrade directly. In this case, complete the following steps:
  1. Create a full and clean backup
  2. Uninstall all ecoDMS components
  3. Restart your computer
  4. Now install the new version with all necessary components
  5. Restore the backup according to the steps described in the ecoDMS manual
- Do not delete or modify the directory when updating / upgrading.

PDF/A Printer upgrade under Windows:
If you have an earlier version of the PDF/A printer (including ecoDMS version 18.09), please note / execute the following:

1. Earlier ecoDMS printers must be uninstalled before an upgrade
2. After uninstalling, verify in the Control Panel that no ecoDMS printer is listed under Devices and Printers
   a) If a printer is still available, remove the printer by clicking "Remove Device" in the context menu
3. Now you can install the printer of the new ecoDMS version.

Note: Once you have installed the PDF/A printer of the new ecoDMS version, you can install any updates over it as usual.

General upgrade information:

- **Connections:** Exit all active ecoDMS connections and clients, close all connection managers and make sure that no user is connected with the server.
- **Inbox**: Please ensure that before you upgrade there are no more files in the inbox. The inbox and the folder for the scanned documents (scaninput) must be empty.
- **System requirements**: Always read the system requirements before you upgrade. Make sure that your system environment complies with the ecoDMS requirements. In the chapter on "System Requirements", you will find the link to the technical details.
- **Software versions**: When you upgrade, all ecoDMS components must always have the latest version (always upgrade Client, Server, plugins,... to the same ecoDMS version).
- **Installation**: You can upgrade straight to the latest ecoDMS version. So if you are using ecoDMS version 16.09 or 18.09, you can switch to the latest version by following the upgrade notes and the latest system requirements.
- **Antivirus software:** Disable your antivirus software during the ecoDMS Server installation. Then add the data folder you select during the installation to the exclusions list in your antivirus software.
- **Synchronization and Cloud services:** If you are using synchronisation and cloud services, you must ensure that the ecoDMS folders are excluded when upgrading. Otherwise this may lead to errors in the data folders / containers.
- **Archives:** If you installed ecoDMS in an earlier version and created several archives in the Settings, they will persist when you upgrade. The ecoDMS archives are displayed in the footer of the client. For new ecoDMS installations, all documents are stored neatly in an archive. ecoDMS does not create more than one archive.
- **Migration / Full-text indexing:** Please note that following the upgrade, existing data will be migrated and full-text indexed in a background process.
  - The duration of the operation depends on the data volume.
  - Until the migration has completed, the server may show high capacity utilisation.
  - Leave the computer switched on until the migration is complete.
  - You can monitor the progress in the Settings dialogue under "Settings - File Indexing".

2.2 Installation

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

2.2.1 AllInOne Installer

A complete package of all basic components is available for download on the ecoDMS website. Use this installation file to execute all necessary base components in sequence within one installation. The package includes

- the ecoDMS Server with postgreSQL database & container storage system,
- the ecoDMS Client including Inbox & Connection Manager
- and the PDF/A Printer from ecoDMS.

If all ecoDMS components of the installation have been installed on a workstation, an ecoDMS profile will already exist in the Connection Manager for this workstation. Please refer to the chapter "Access Data" in the ecoDMS manual for the login credentials for the default profile.

The following explains how to install all basic ecoDMS components via AllInOne Installer under Windows.

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

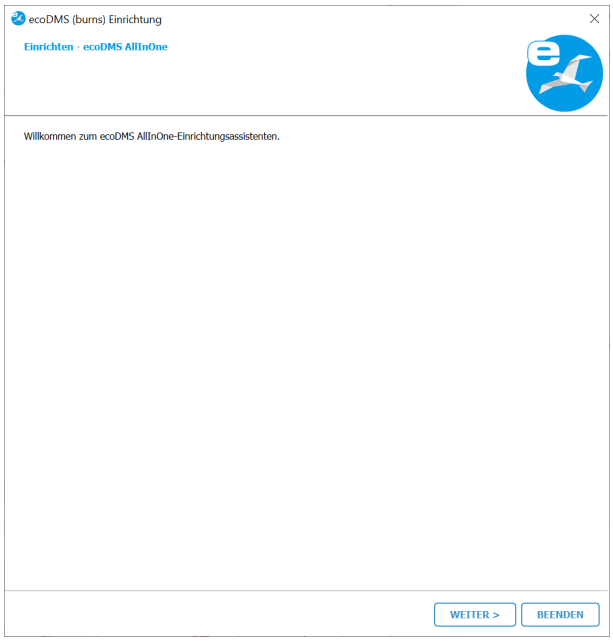

Figure 2.1: Install ecoDMS Basic Components via AllInOne: Welcome Screen

5. Follow the instructions from the installer by confirming the installation target, the desired components (recommended for single user: ALL) and the licensing terms in the following as for a single installation.

2.2.2 ecoDMS Server

- As a client-server system, ecoDMS Server forms the base of ecoDMS.
- It is the main software component of ecoDMS.
- In order to work with each of the components (ecoDMS Client, ecoDMS Webclient, plugins, API REST Service...), the server must be accessible and stable.
- **Update / Upgrade:** If this installation is an update, close all Connection Managers first and make sure that no user is connected with the server.

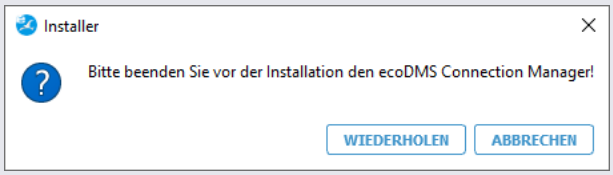

Figure 2.2: Message - Please Exit Connection Manager

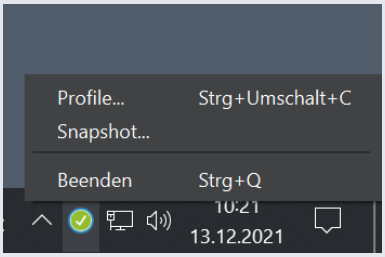

Figure 2.3: Please Exit Connection Manager

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

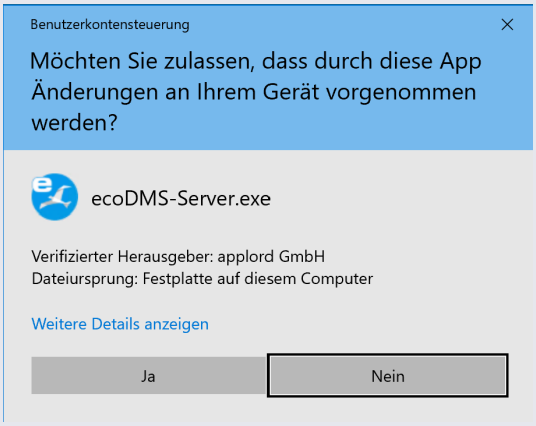

Figure 2.4: Confirm the Windows security prompt with "Yes" to run the ecoDMS Server installation

The following explains how to install ecoDMS Server under Windows.

1. Download the file for the "ecoDMS Server Installer" at ecodms.de.
2. If this is a ZIP-file, unzip it first.

3. Execute the "....exe" installation file.
4. The setup wizard opens. Click "Next" in the "Welcome Screen".

Figure 2.5: Install ecoDMS Server: Start Screen

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

Figure 2.6: Install ecoDMS Server: Installation Folder

6. Select the server components you want to install.
   a) We recommend you install "ecoDMS Server" and "postgreSQL".
      i. Der ecoDMS Server kann an dieser Stelle nicht abgewählt werden.
   b) If the installation is an update, only "ecoDMS Server" is displayed here for selection.

Figure 2.7: Install ecoDMS Server: Select Components

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

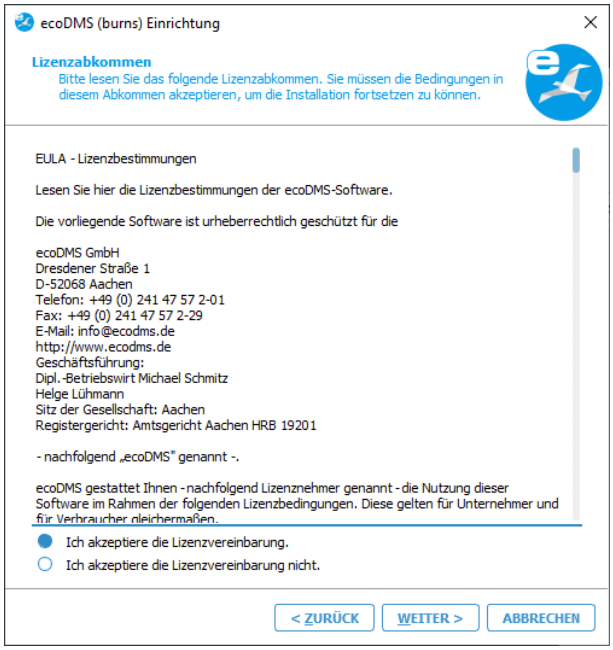

Figure 2.8: Install ecoDMS Server: License Agreement

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

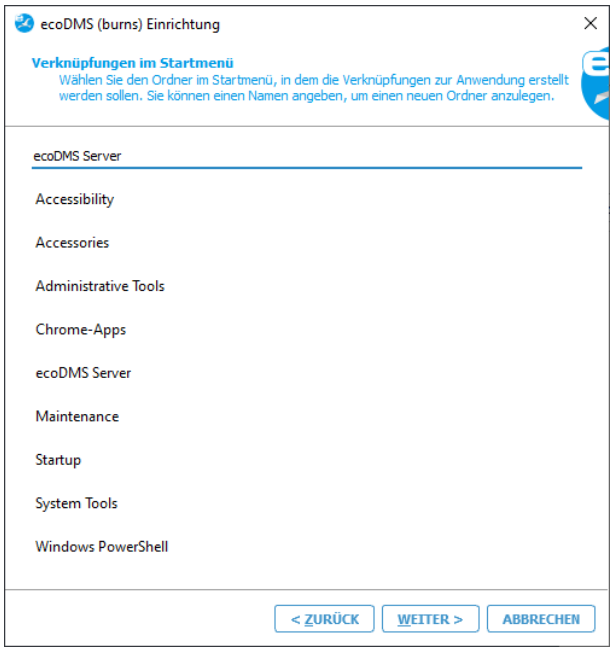

Figure 2.9: Install ecoDMS Server: Start Menu Shortcut

9. The following describes how to setup the database, ports and language. In a standard setup, the default ports should not be changed. The ports are used, for example, for the client connections and for the database. If the selected port is already occupied, an error message displays.
   - **Select the data folder:** The data folder is the target folder for the container storage system. This is where ecoDMS saves the data. In a default installation, the default folder should not be changed. You can change the suggested folder by clicking "Browse" or "...". We recommend using the largest possible memory for the data folder.
   - **ecoDMS Port for client connections:** Assign the port for the connection between ecoDMS Desktop Client and ecoDMS Server. The default port is:

     ```
     17001
     ```

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

     ```
     17002
     ```

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

     ```
     8080
     ```

   - **Apply firewall rules for remote access:** The firewall controls the incoming and outgoing traffic between computer and internet. As a rule, you do not need to modify the general firewall settings. To access ecoDMS from outside and enable the web service, the default settings for the port are not sufficient. They must be shared. Check the checkbox to enable the firewall for ecoDMS and web access. ecoDMS makes the necessary settings automatically. Under Windows you can manage the firewall settings at System Settings -> System and Security -> Windows Firewall (-> Advanced settings).
   - **ecoDMS language settings:** Select the language in which you want to save the attributes and ecoDMS functions for all users (e.g. classification attributes, status...) You can install the server in the languages German or English.

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

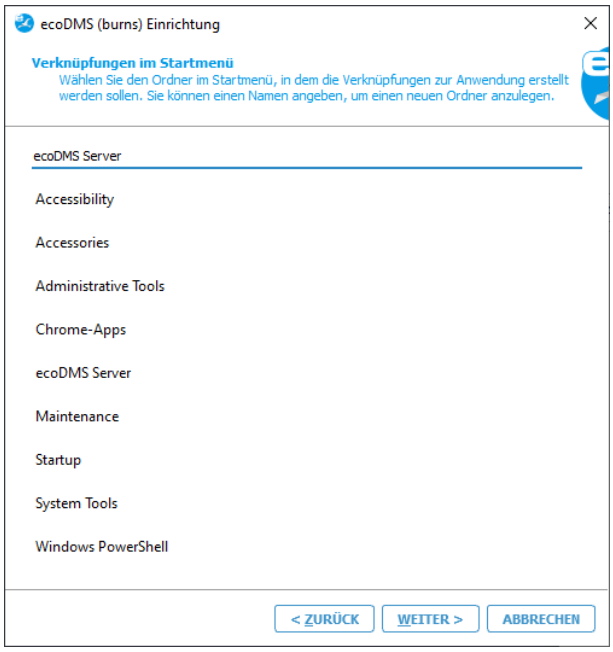

Figure 2.10: Install ecoDMS Server: Database and Port Settings

10. **Default settings only for German installation:** If you have not created a postgreSQL Database, you can select a default setting for the database. The default setting includes a pre-defined archive structure for different application fields. A rough folder structure, document types and, depending on the line of business, some specific classification attributes already exist.
    a) You can only install default settings on a German Windows operating system.
    b) On non-German operating systems, this installation step is not displayed.

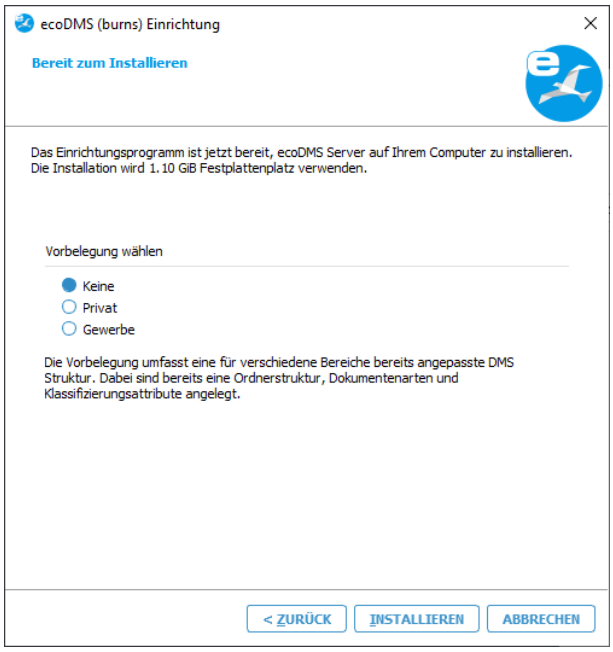

Figure 2.11: Install ecoDMS Server: Default Settings (Only for German System Environment)

11. ecoDMS Server is now ready for installation. Start the installation by clicking the "Install" button. The installation is executed. This process may take a while.
    a) The following components are installed (depending on selection and software version).
        i. ecoDMS Server
        ii. Microsoft Visual C++
        iii. postgreSQL

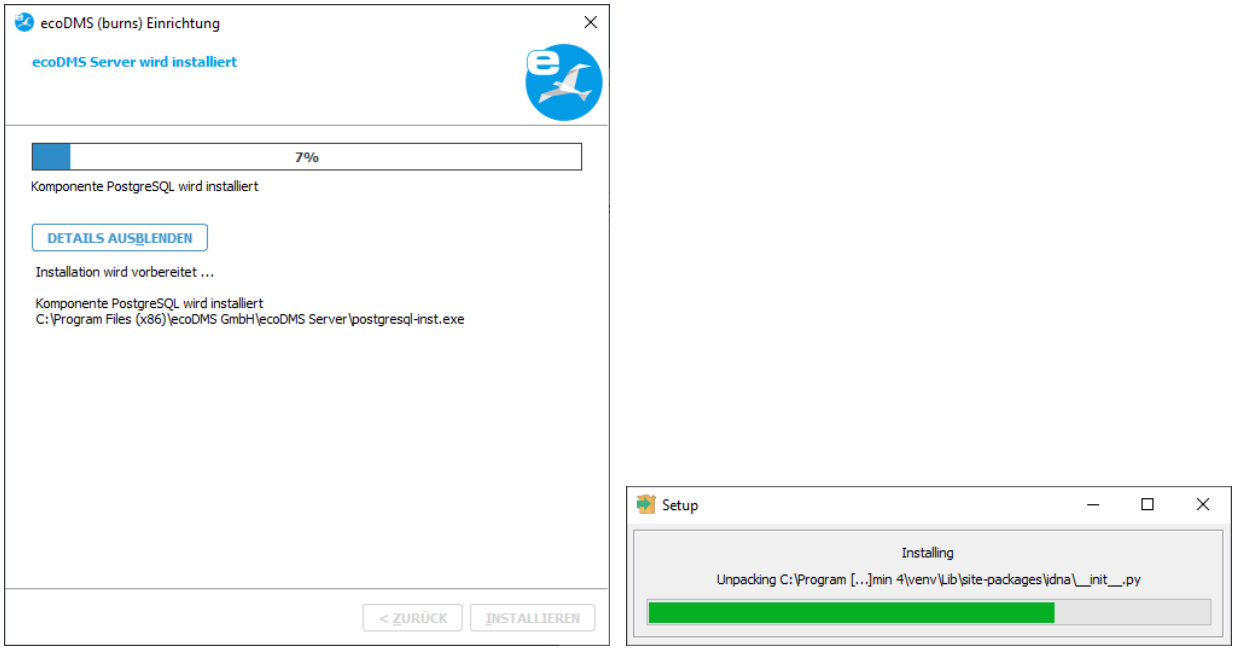

Figure 2.12: Install ecoDMS Server: Installation

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

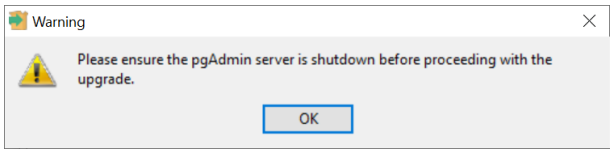

Figure 2.13: ecoDMS Server installieren: Meldung von postgreSQL

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

Figure 2.14: Install ecoDMS Server: Installation Completed

2.2.3 ecoDMS Client

Update / Upgrade: If this installation is an update, close the Connection Manager first.

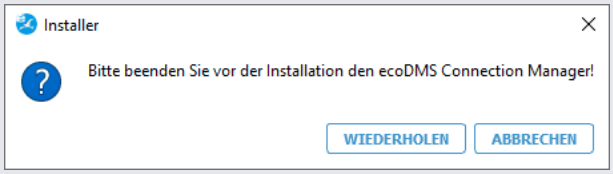

Figure 2.15: Note - Please Exit Connection Manager

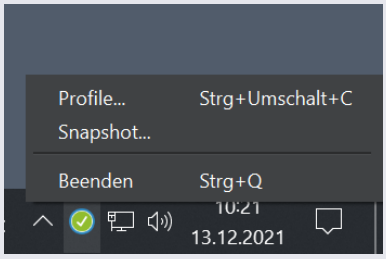

Figure 2.16: Please Exit Connection Manager

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

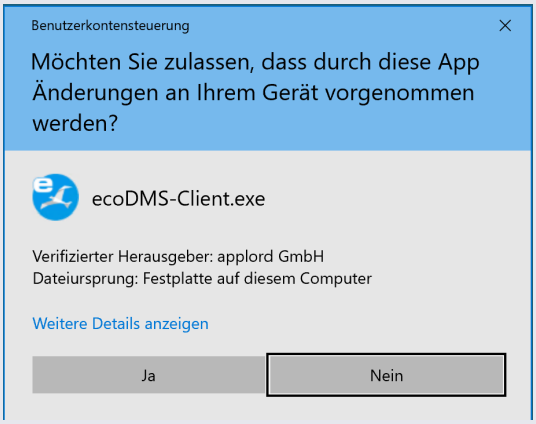

Figure 2.17: Confirm the Windows security prompt with "Yes" to run the ecoDMS Client installation

Use this installation file to install ecoDMS user interface. Moreover, the Connection Manager and the inbox are fixed components of this software package. The following explains the installation process of the ecoDMS Client under Windows.

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

Figure 2.18: Install ecoDMS Server: Start Screen

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

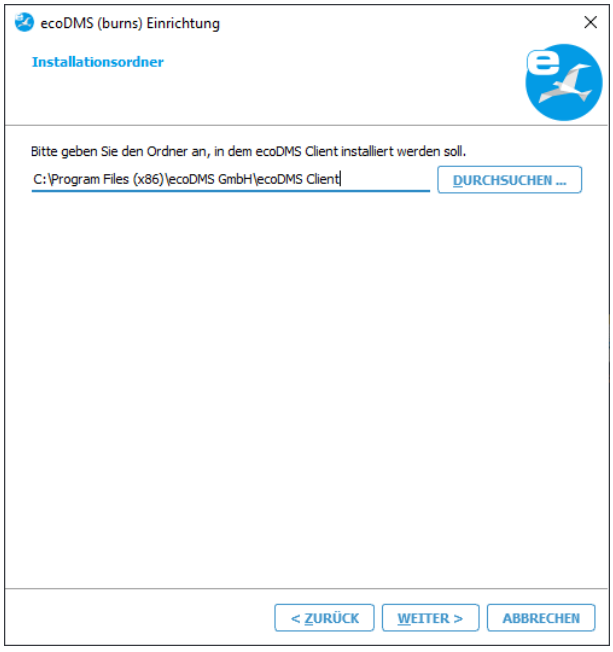

Figure 2.19: Install ecoDMS Client: Installation Destination

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

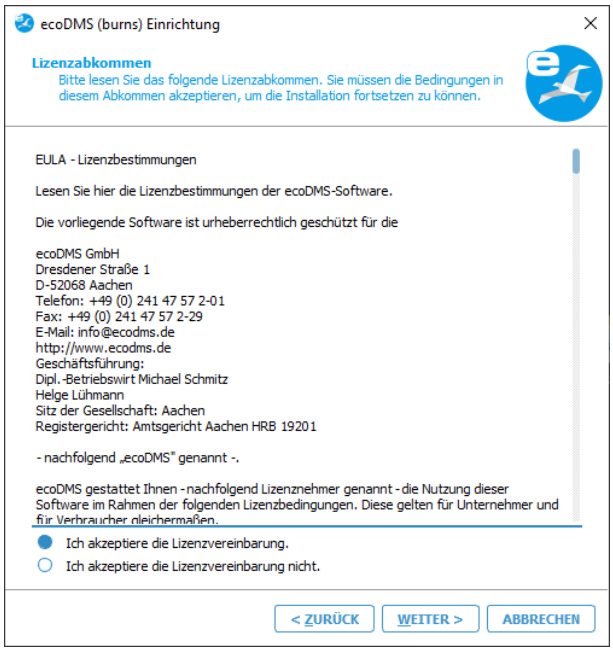

Figure 2.20: Install ecoDMS Client: License Agreement

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

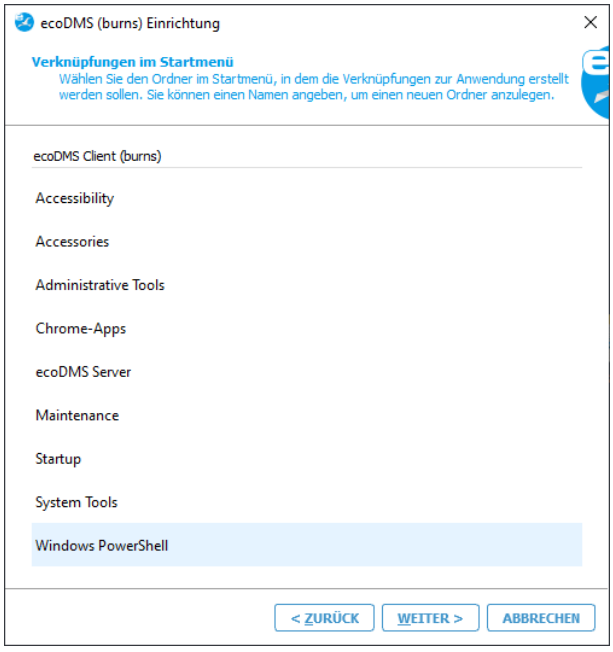

Figure 2.21: Install ecoDMS Client: Start Menu Shortcut

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

Figure 2.22: Install ecoDMS Client: Select Language and Start Installation

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

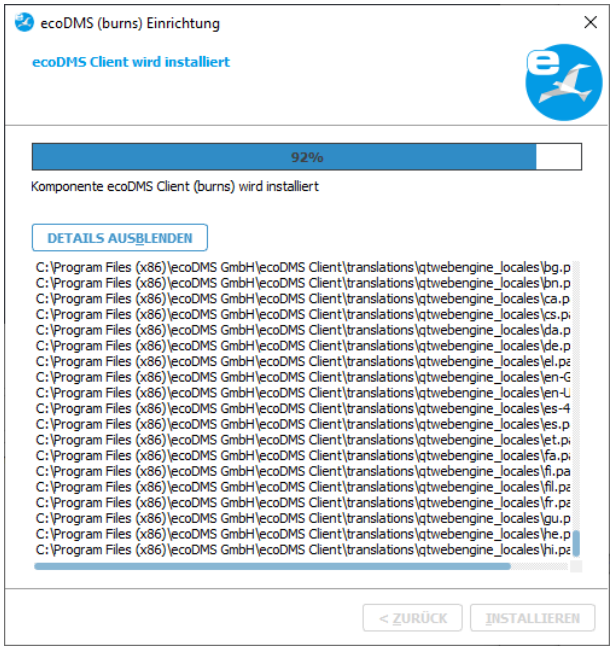

Figure 2.23: Install ecoDMS Client: Installation Process

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

Figure 2.24: Install ecoDMS Client - Installation complete

2.2.3.1 Silent Install: ecoDMS Client

- You can install ecoDMS Client and ecoDMS Printer without user interaction from ecoDMS version 21.06 onwards. ("Silent Install")
- During the first installation of ecoDMS Client and ecoDMS Printer, the system creates directories specified in "SILENTINSTALLPATH".
- When upgrading ecoDMS Client and ecoDMS Printer, select the directories that were already assigned during the previous installation.
- For an installation in English language, use SILENTLANG=en.

1. Download ecoDMS Client.
2. Start the command line (cmd) as administrator.
3. Example for the silent installation of ecoDMS Client:

```
\Downloads\ecoDMS-Client.exe SILENTINSTALLPATH="C:\Programmes (x86)\ecoDMS GmbH\ecoDMS
    Client" SILENTLANG=en
```

4. Click “Enter" to confirm your entry.
5. ecoDMS Client installs and will be available after a few minutes.

2.2.4 ecoDMS Printer

PDF/A Printer upgrade under Windows:
If a previous version of the PDF/A printer (up to and including ecoDMS version 18.09) is installed, please note / complete the following points first:

1. Older ecoDMS printers must be uninstalled first
2. After uninstalling, verify in the Control Panel that no ecoDMS printer is listed under Devices and Printers.
   a) If a printer is still available, remove the printer by clicking "Remove Device" in the context menu.
3. Now you can install the printer of the new ecoDMS version.

Note: Once you have installed the PDF/A printer of the new ecoDMS version, you can install any updates over it as usual.

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

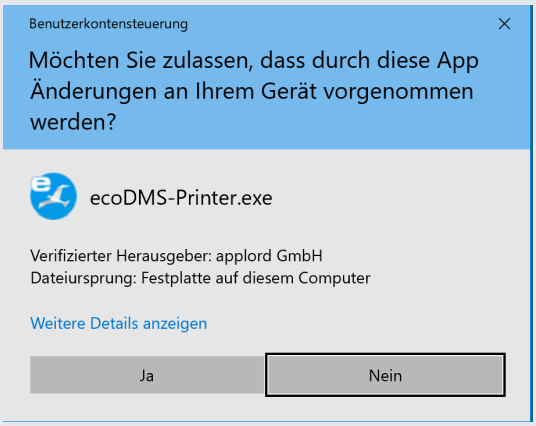

Figure 2.25: Confirm the Windows security prompt with "Yes" to run the ecoDMS Printer installation

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

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

Figure 2.26: Install ecoDMS Printer: Start Screen

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

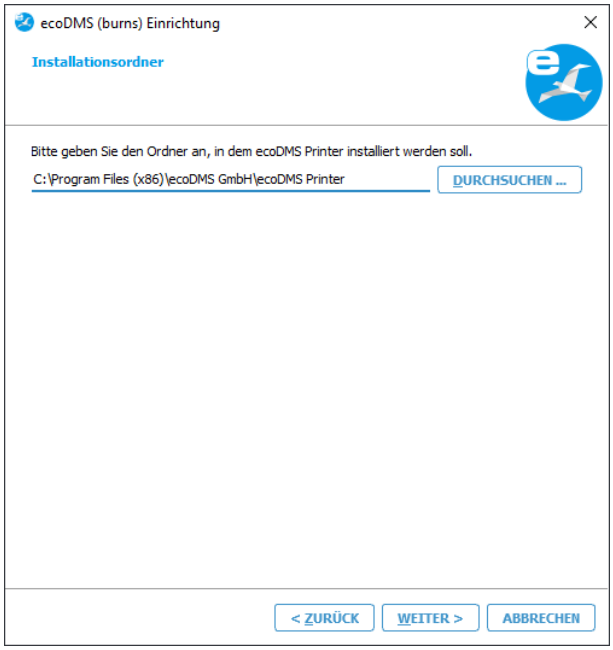

Figure 2.27: Install ecoDMS Printer: Installation Destination

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

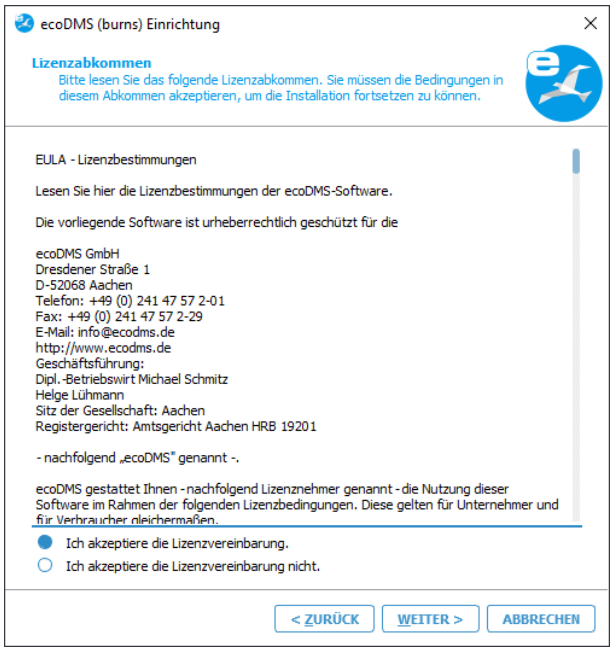

Figure 2.28: Install ecoDMS Printer: License Agreement

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

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

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

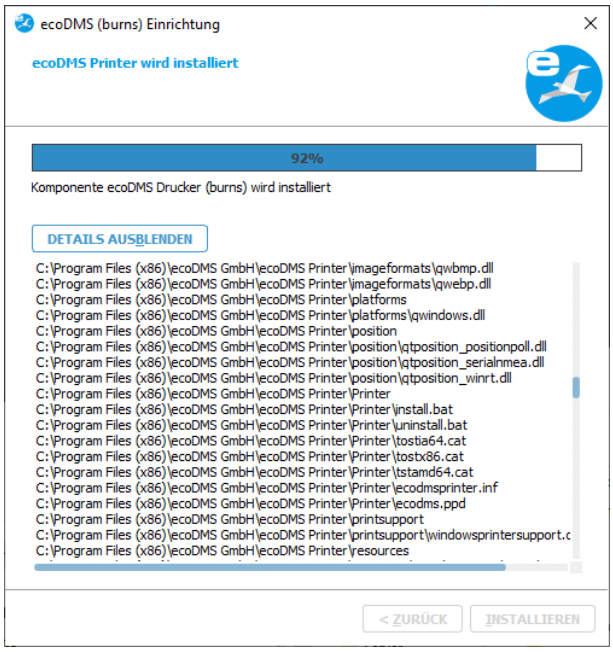

Figure 2.30: Install ecoDMS Printer: Installation Process

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

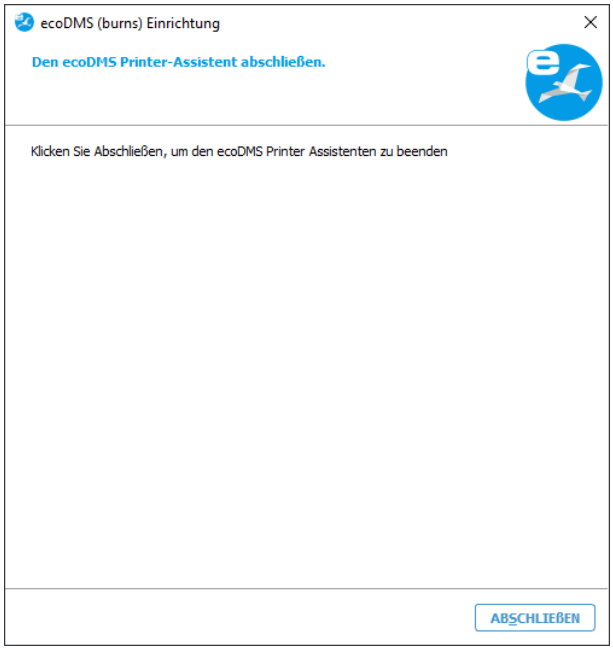

Figure 2.31: Install ecoDMS Printer - Installation Complete

2.2.4.1 Silent Install: ecoDMS Printer

- You can install ecoDMS Client and ecoDMS Printer without user interaction from ecoDMS version 21.06 onwards. ("Silent Install")
- During the first installation of ecoDMS Client and ecoDMS Printer, the system creates directories specified in "SILENTINSTALLPATH".
- When upgrading ecoDMS Client and ecoDMS Printer, select the directories that were already assigned during the previous installation.
- For an installation in English language, use SILENTLANG=en.

1. Download ecoDMS Printer.
2. Start the command line (cmd) as administrator.
3. Example for the silent installation of ecoDMS Printer:

```
\Downloads\ecoDMS-Printer.exe SILENTINSTALLPATH="C:\Programmes (x86)\ecoDMS GmbH\ecoDMS
    Printer" SILENTLANG=en
```

4. Click “Enter" to confirm your entry.
5. ecoDMS Printer installs and will be available after a few minutes.

2.3 Uninstall

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

- **ecoDMS Server:** Uninstalling the ecoDMS Server component will irrevocably delete all stored databases. You cannot undo this operation.
- **Recovery:** Recovering the data requires a new installation of ecoDMS and importing a clean and complete data backup.
- **An error has occurred while uninstalling:**

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

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

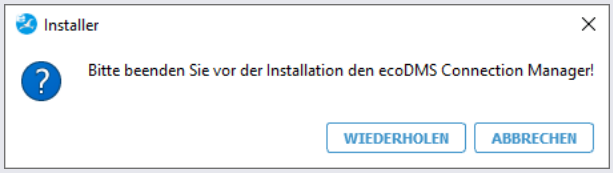

Figure 2.32: Message - Please Exit Connection Manager

- **Stop Connection Manager:** Please disconnect all user profiles connected with ecoDMS before uninstalling and exit the Connection Manager. The Connection Manager establishes the connection to 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".

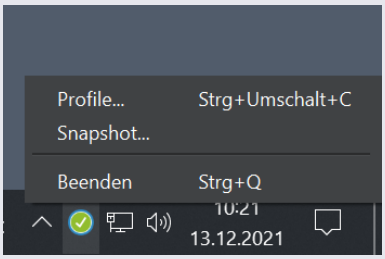

Figure 2.33: Please Exit Connection Manager

- **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.

2.3.1 ecoDMS Server

Connections: Exit all active ecoDMS connections and clients, close all connection managers and make sure that no user is connected with the server.

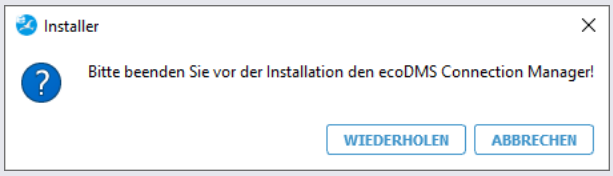

Figure 2.34: Meldung - Please Exit Connection Manager

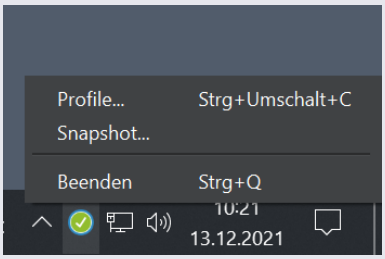

Figure 2.35: Please Exit Connection Manager

The following explains the uninstall process of the ecoDMS Server under Windows.

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

Figure 2.36: Uninstall ecoDMS Server - Select Components

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

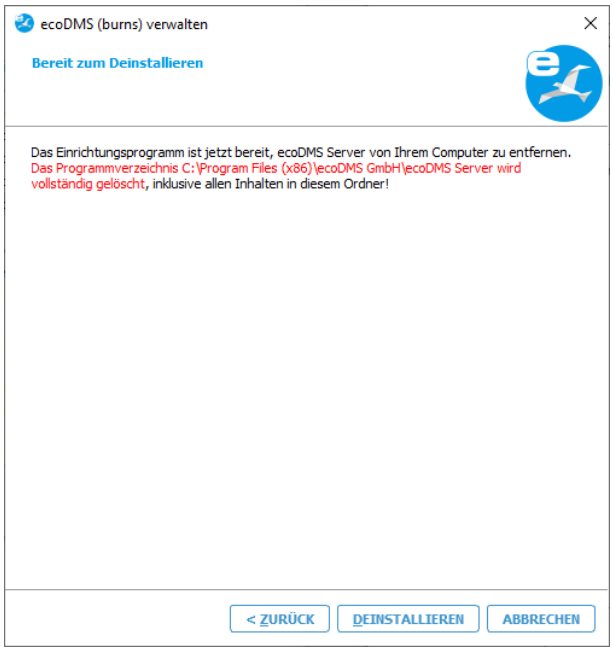

Figure 2.37: Uninstall ecoDMS Server - Delete Data Store

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

Figure 2.38: Uninstall ecoDMS Server - Uninstall Process

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

Figure 2.39: Uninstall ecoDMS Server - Uninstall Complete

2.3.2 ecoDMS Client

Connections: Exit all active ecoDMS connections and clients and close all connection managers on the corresponding workstation.

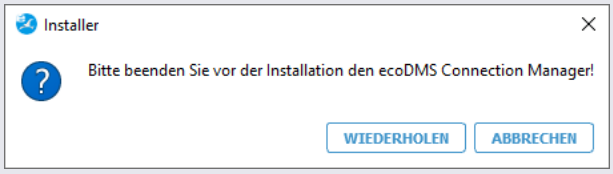

Figure 2.40: Meldung - Please Exit Connection Manager

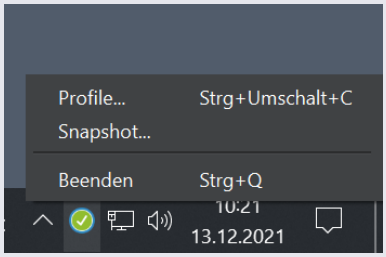

Figure 2.41: Please Exit Connection Manager

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

1. In the Windows Control Panel, open the interface to uninstall installed software ("Uninstall Program").
2. Select the "ecoDMS Client" software by double-clicking it in the list of installed programmes.
3. Click "Uninstall" to start uninstalling. Click "Cancel" to abort the process.
   a) Please note that all content from the listed folder will be irrevocably removed when you execute the uninstall process.

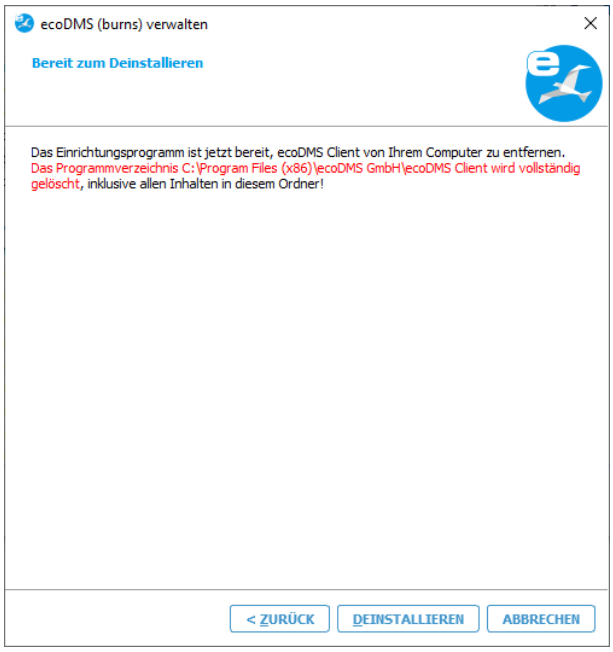

Figure 2.42: Uninstall ecoDMS Client - Delete Data Store

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

Note:
- You can find the Connection Manager on your operating system 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 display the hidden icons.

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

Figure 2.43: Uninstall ecoDMS Client - Uninstall Complete

2.3.3 ecoDMS Printer

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

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

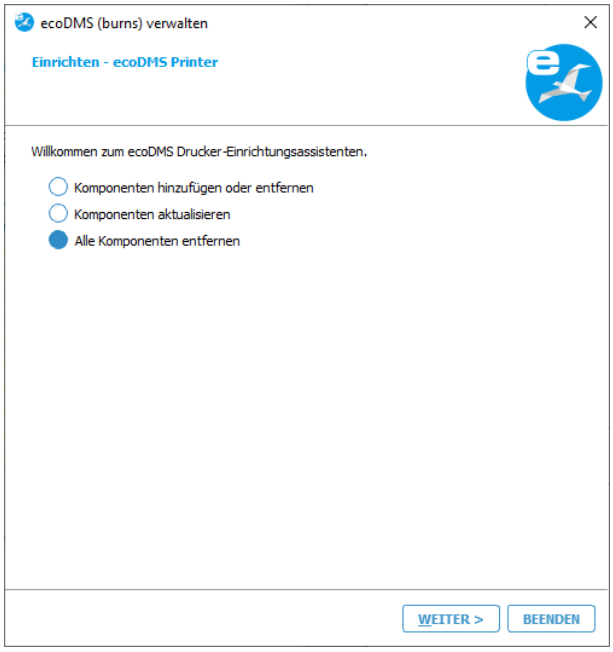

Figure 2.44: Uninstall Printer - Select Components

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

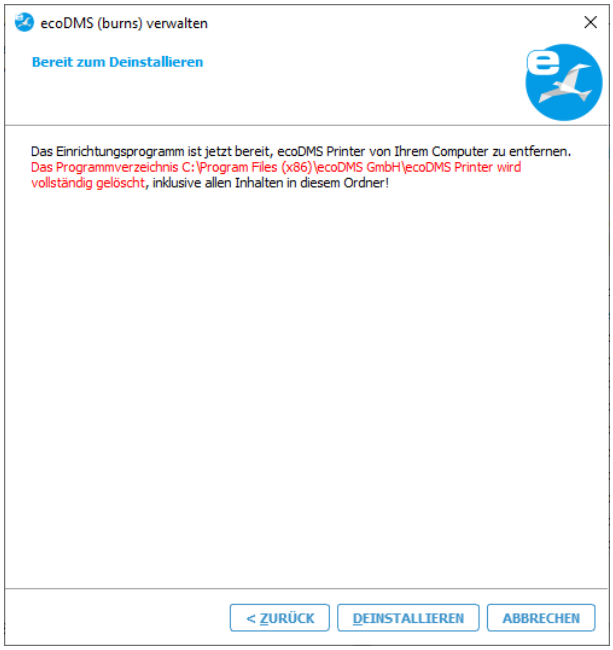

Figure 2.45: Uninstall ecoDMS Printer - Delete Data Store

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

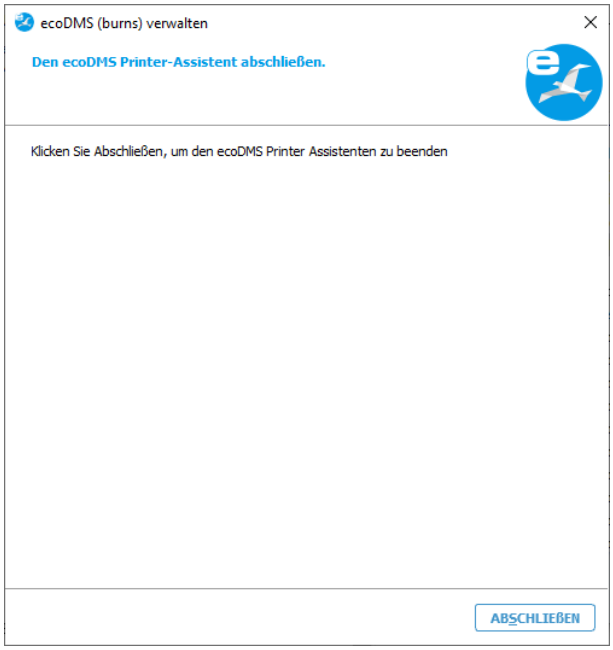

Figure 2.46: Uninstall ecoDMS Printer - Uninstall Complete

3 Linux

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

3.1 Upgrade

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

Important information about creating a backup before you upgrade:

- Before upgrading, you must create a full and clean backup.
  - The ecoDMS manual contains a detailed description of this process.
- Do not save this backup file in the ecoDMS Server directory!
- Also, before creating a backup, make sure that you create the backup with the latest update of your current ecoDMS version.
  - For example, 18.09-3/1
- We recommend you completely empty the inbox before backing up your data.
  - 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 with the dialogue box which displays.

Important notes about the database:

- When upgrading from ecoDMS version14.08 or 16.09, postgreSQL is upgraded to version 10.X.
- If the database was installed manually for ecoDMS, you cannot upgrade directly. In this case, complete the following steps:
  1. Create a full and clean backup
  2. Uninstall all ecoDMS components
  3. Restart your computer
  4. Now install the new version with all necessary components
  5. Restore the backup according to the steps described in the ecoDMS manual
- Do not delete or modify the directory when updating / upgrading.

General upgrade information:

- **Connections:** Exit all active ecoDMS connections and clients, close all connection managers and make sure that no user is connected with the server.
- **Inbox**: Please ensure that before you upgrade there are no more files in the inbox. The inbox and the folder for the scanned documents (scaninput) must be empty.
- **System requirements**: Always read the system requirements before you upgrade. Make sure that your system environment complies with the ecoDMS requirements. In the chapter on "System Requirements", you will find the link to the technical details.
- **Software versions**: When you upgrade, all ecoDMS components must always have the latest version (always upgrade Client, Server, plugins,... to the same ecoDMS version).
- **Installation**: You can upgrade straight to the latest ecoDMS version. So if you are using ecoDMS version 16.09 or 18.09, you can switch to the latest version by following the upgrade notes and the latest system requirements.
- **Antivirus software:** Disable your antivirus software during the ecoDMS Server installation. Then add the data folder you select during the installation to the exclusions list in your antivirus software.
- **Synchronization and Cloud services:** If you are using synchronisation and cloud services, you must ensure that the ecoDMS folders are excluded when upgrading. Otherwise this may lead to errors in the data folders / containers.
- **Archives:** If you installed ecoDMS in an earlier version and created several archives in the Settings, they will persist when you upgrade. The ecoDMS archives are displayed in the footer of the client. For new ecoDMS installations, all documents are stored neatly in an archive. ecoDMS does not create more than one archive.
- **Migration / Full-text indexing:** Please note that following the upgrade, existing data will be migrated and full-text indexed in a background process.
  - The duration of the operation depends on the data volume.
  - Until the migration has completed, the server may show high capacity utilisation.
  - Leave the computer switched on until the migration is complete.
  - You can monitor the progress in the Settings dialogue under "Settings - File Indexing".

3.1.1 Upgrade under Linux

1. 1. Read the upgrade information in this chapter!
2. Update sources.list in your system according to the apt sources listed in this manual.
3. Then update the package sources.

```
sudo apt-get update
```

4. Now install the individual ecoDMS components according to the installation guide in this manual.

3.2 Installation

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

3.2.1 Install Editor

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

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

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

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

3.2.2 apt Sources

Before you can install the ecoDMS components, you must first define the necessary apt sources. Proceed as follows.

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

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

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

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

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

   64bit / Ubuntu 22.04 LTS (Jammy Jellyfish)

```
deb http://www.ecodms.de/ecodms_220864/jammy /
```

   64bit / Ubuntu 20.04 LTS (Focal Fossa)

```
deb http://www.ecodms.de/ecodms_220864/focal /
```

   64bit / Ubuntu 18.04 LTS (bionic)

```
deb http://www.ecodms.de/ecodms_220864/bionic /
```

   64bit / Debian 11 (bullseye)

```
deb http://www.ecodms.de/ecodms_220864/bullseye /
```

   64bit / Debian 10 (buster)

```
deb http://www.ecodms.de/ecodms_220864/buster /
```

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

```
wget -qO- http://www.ecodms.de/gpg/ecodms.key | gpg --dearmor | sudo tee /etc/apt/trusted.
    gpg.d/ecodms.gpg && clear
```

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

```
sudo apt-get update
```

3.2.3 ecoDMS Server

- As a client-server system, ecoDMS Server forms the base of ecoDMS.
- It is the main software component of ecoDMS.
- In order to work with each of the components (ecoDMS Client, ecoDMS Webclient, plugins, API REST Service...), the server must be accessible and stable.
- **If you have installed several Java Runtime environments, please ensure that the following package is installed:**
  - Java 8:

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

  - Java 7:

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

- A precondition for this installation is that the apt-sources were edited as described in this manual.
- **Update / Upgrade:** If this installation is an update, close all Connection Managers first and make sure that no user is connected with the server.

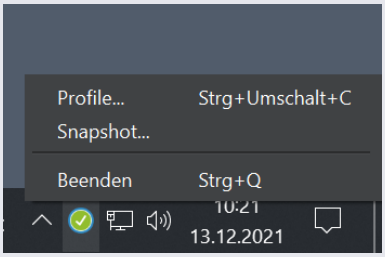

Figure 3.1: Please Exit Connection Manager

The following explains the installation process of the ecoDMS server under Linux distributions.

1. Open the console.
2. Start the installation with

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

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

3.2.4 ecoDMS Client

- A precondition for this installation is that the apt-sources were edited as described in this manual.
- **Update / Upgrade:** If this installation is an update, close the Connection Manager first.

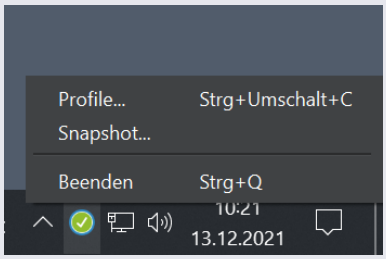

Figure 3.2: Please Exit Connection Manager

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

1. Open the console.
2. Start the installation with

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

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

3.2.5 ecoDMS Printer

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

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

1. Open the console.
2. Start the installation with

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

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

3.3 Uninstall

The following section describes how to uninstall ecoDMS components under Linux distributions.

3.3.1 ecoDMS Server

Connections: Exit all active ecoDMS connections and clients, close all connection managers and make sure that no user is connected with the server.

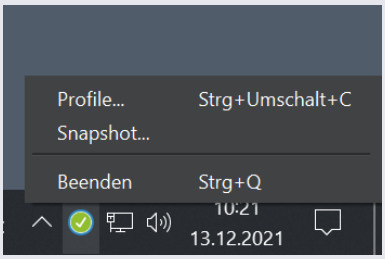

Figure 3.3: Please Exit Connection Manager

The following explains the uninstall process of the ecoDMS Server under Linux distributions.

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

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

3.3.2 ecoDMS Client

Connections: Exit all active ecoDMS connections and clients and close all connection managers on the corresponding workstation.

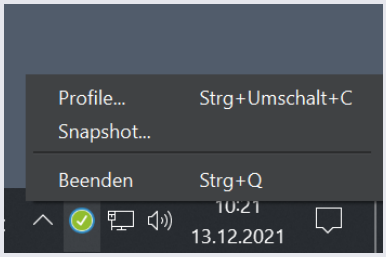

Figure 3.4: Please Exit Connection Manager

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

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

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

3.3.3 ecoDMS Printer

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

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

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

4 NAS

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

4.1 Upgrade and Update

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

Important information about creating a backup before you upgrade:

- Before upgrading, you must create a full and clean backup.
  - The ecoDMS manual contains a detailed description of this process.
- Do not save this backup file in the ecoDMS Server directory!
- Also, before creating a backup, make sure that you create the backup with the latest update of your current ecoDMS version.
  - For example, 18.09-3/1
- We recommend you completely empty the inbox before backing up your data.
  - 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 with the dialogue box which displays.

Important notes about the database:

- When upgrading from ecoDMS version14.08 or 16.09, postgreSQL is upgraded to version 10.X.
- If the database was installed manually for ecoDMS, you cannot upgrade directly. In this case, complete the following steps:
  1. Create a full and clean backup
  2. Uninstall all ecoDMS components
  3. Restart your computer
  4. Now install the new version with all necessary components
  5. Restore the backup according to the steps described in the ecoDMS manual
- Do not delete or modify the directory when updating / upgrading.

General upgrade information:

- **Connections:** Exit all active ecoDMS connections and clients, close all connection managers and make sure that no user is connected with the server.
- **Inbox**: Please ensure that before you upgrade there are no more files in the inbox. The inbox and the folder for the scanned documents (scaninput) must be empty.
- **System requirements**: Always read the system requirements before you upgrade. Make sure that your system environment complies with the ecoDMS requirements. In the chapter on "System Requirements", you will find the link to the technical details.
- **Software versions**: When you upgrade, all ecoDMS components must always have the latest version (always upgrade Client, Server, plugins,... to the same ecoDMS version).
- **Installation**: You can upgrade straight to the latest ecoDMS version. So if you are using ecoDMS version 16.09 or 18.09, you can switch to the latest version by following the upgrade notes and the latest system requirements.
- **Antivirus software:** Disable your antivirus software during the ecoDMS Server installation. Then add the data folder you select during the installation to the exclusions list in your antivirus software.
- **Synchronization and Cloud services:** If you are using synchronisation and cloud services, you must ensure that the ecoDMS folders are excluded when upgrading. Otherwise this may lead to errors in the data folders / containers.
- **Archives:** If you installed ecoDMS in an earlier version and created several archives in the Settings, they will persist when you upgrade. The ecoDMS archives are displayed in the footer of the client. For new ecoDMS installations, all documents are stored neatly in an archive. ecoDMS does not create more than one archive.
- **Migration / Full-text indexing:** Please note that following the upgrade, existing data will be migrated and full-text indexed in a background process.
  - The duration of the operation depends on the data volume.
  - Until the migration has completed, the server may show high capacity utilisation.
  - Leave the computer switched on until the migration is complete.
  - You can monitor the progress in the Settings dialogue under "Settings - File Indexing".

4.1.1 Upgrade on a NAS

1. Read the upgrade information in this chapter!
2. For a standard ecoDMS installation on a NAS you require:
   a) a new, empty folder for the data (e.g. under "Container", example “ecodmsdata1809”)
   b) **Important! Create new folders for an upgrade installation!**
      i. **Do not use folders that you already used for a previous installation of ecoDMS!**
   c) shared folders for
      i. Backup
      ii. Restore
      iii. Scaninput
         A. **Please note that if you want to share the folders, you must assign permissions to the shared folders.**

Execute the upgrade by working through the following steps in the order specified. Please refer to the notes about upgrading in this chapter.

1. Stop the ecoDMS container on your NAS system.
2. Under "Docker - Register" search for the package "ecodms/ecodms"
3. Download this package
4. Under "Image", click the loaded image
5. Click "Start" to start the image
6. Now complete all installation steps for your system, starting with “Create Container”
7. After creating the container, you can restore the backup

4.1.2 Update on a NAS

- **Before updating the Docker container, deactivate the existing ecoDMS license.**
  - Please follow the steps for deactivation and activation, as described in the ecoDMS manual.
- **Before updating the NAS firmware, you must stop the running containers.**
- Always update all installed components (ecoDMS Server, ecoDMS Client, ecoDMS Printer, Plugins).
- The already existing ecoDMS folders on the NAS contain the ecoDMS data and are required for creating the container.
- When installing an update, you must ensure that the existing folders on the NAS are assigned to the mount paths.
- If you are already using an ecoDMS license for the full version and also want to use this license for the Docker container, you must deactivate the license first. Otherwise you cannot activate the new container.

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

1. First, close all connection managers and make sure that no user is connected with the server.
2. Stop the ecoDMS container.
3. To update a container, **delete** the **existing container** and the **local image** of the installation.
   a) **Do not delete this data folder!**
4. Then create the new container with the **same data folder.**
5. To do so, complete the steps described under "Container Settings" for the Synology or QNAP installation.

4.2 ecoWORKZ

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

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

4.3 Synology Installation (ecoDMS Server)

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

4.3.1 Create Folder Structure for ecoDMS (Example)

For a standard ecoDMS installation on a NAS you require

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

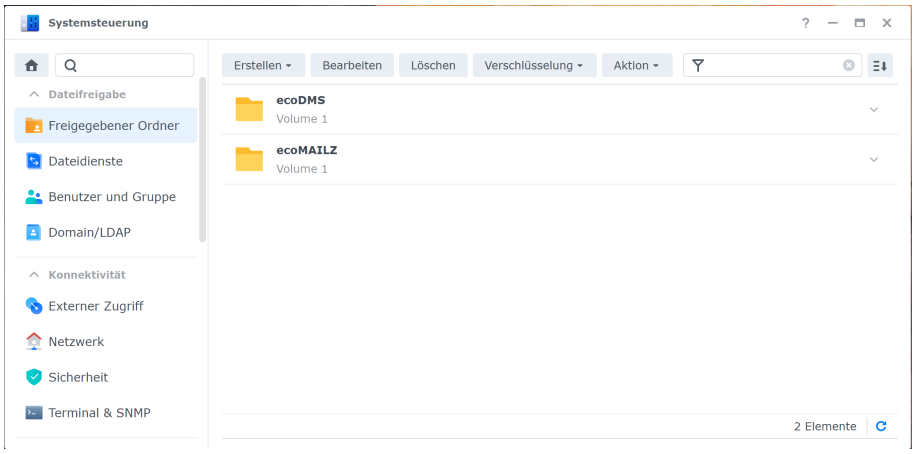

Figure 4.1: Synology - Create Shared Folder

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

Figure 4.2: Synology - Shared Folder - Permissions

A typical folder structure could look like this:

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

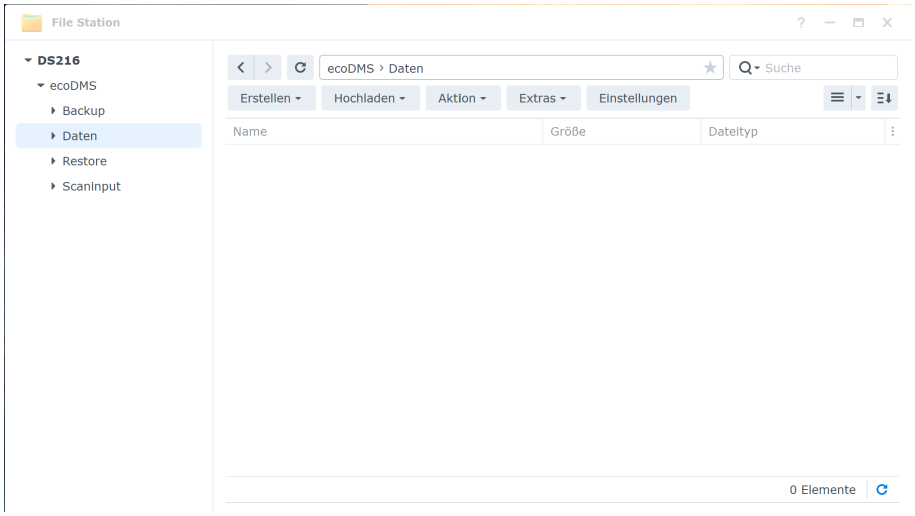

Figure 4.3: Synology - Folder Structure (Example)

4.3.2 Install & Open Docker

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

Figure 4.4: Synology - Install Docker App

4.3.3 Search & Install ecoDMS Images

1. In the "Registration" area of the "Docker" app, search for the "ecoDMS image" with the name "ecodms/ecodms"
2. Then install the package by
   a) right-clicking the **image 22.08**,
   b) then clicking "Download This Image",
   c) and then select and confirm the **entry 22.08-1** in the "Select tag" dialog box.

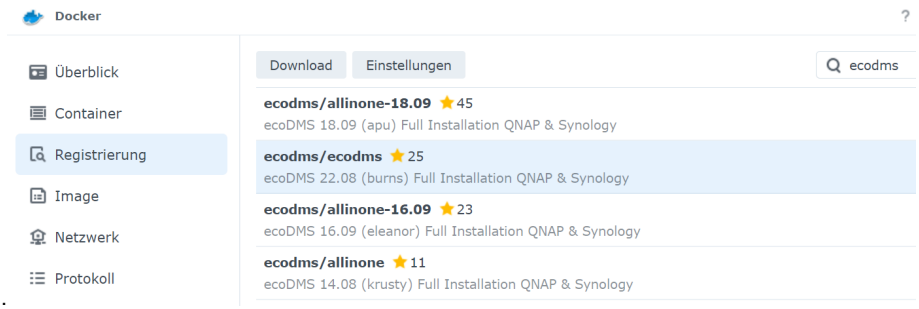

Figure 4.5: Synology - Install ecoDMS Image

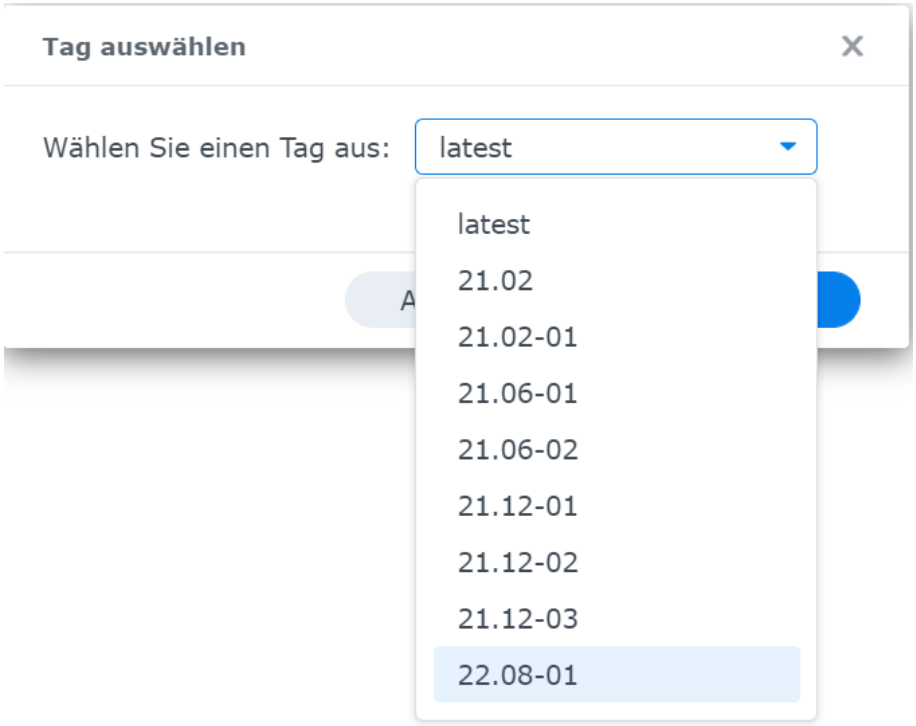

Figure 4.6: Synology - Select Tag - (here: 22.08-01)

4.3.4 Create Container

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

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

4.3.5 Container Settings

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

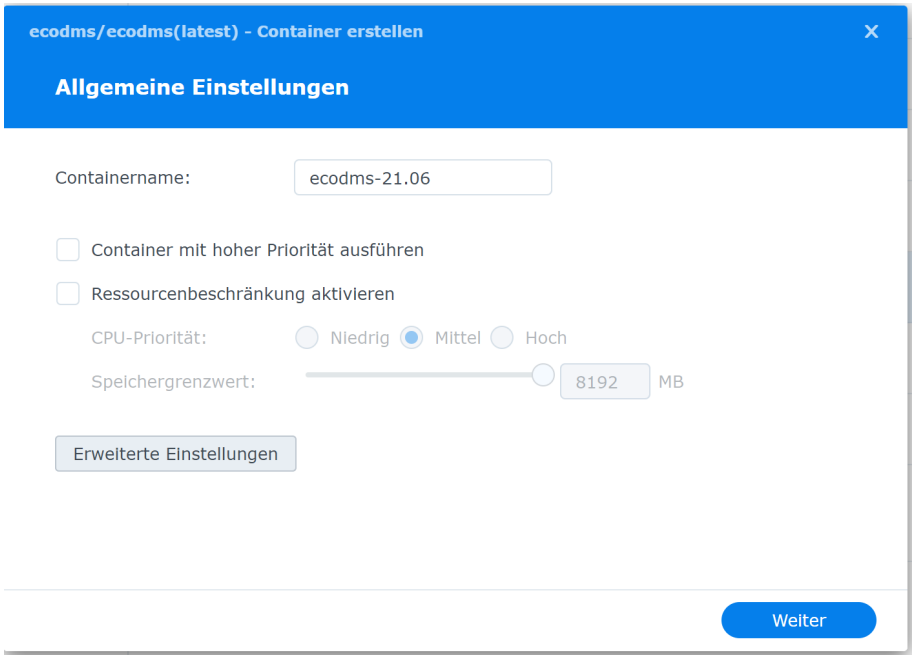

Figure 4.7: Synology - Container Name

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

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

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

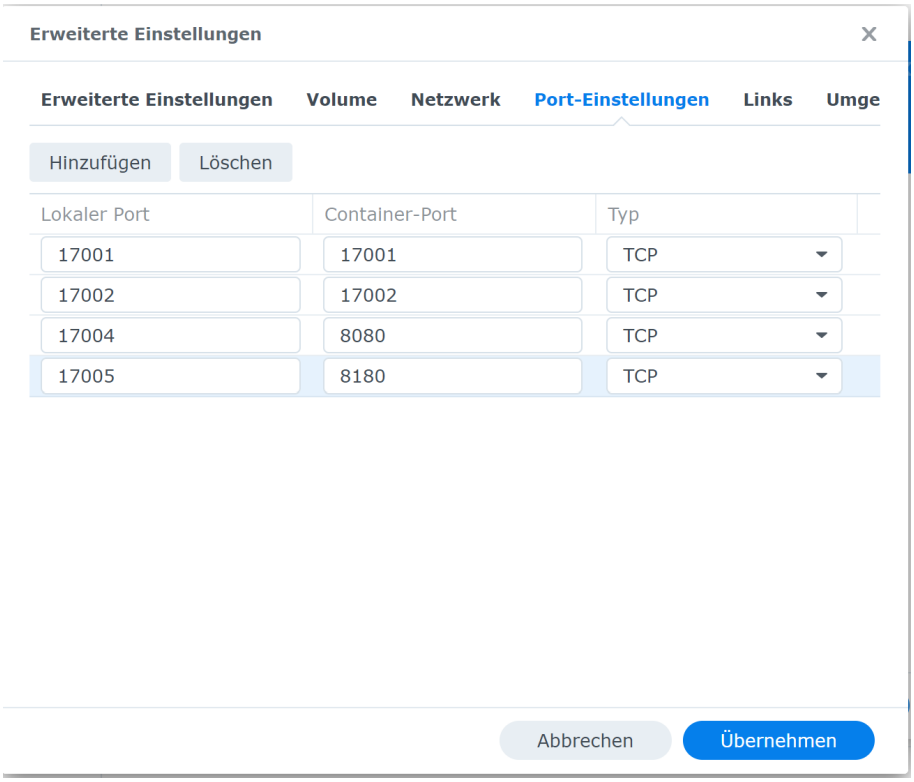

Figure 4.8: Synology - Extended Settings (Port)

4. Now select the "Volume" tab.

4.3.6 Configure Mount Paths

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

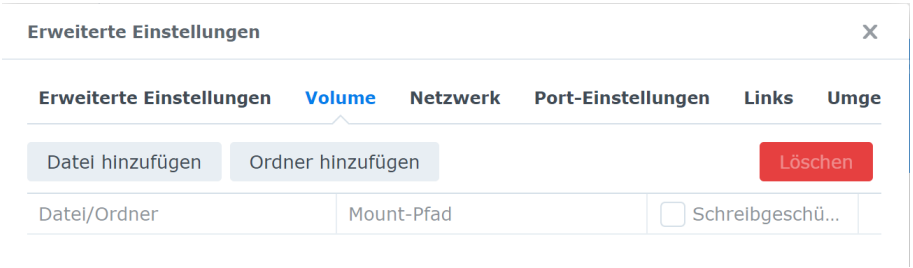

Figure 4.9: Synology - Extended Settings - Add Folder

2. Now select the location where you want to save your ecoDMS data on the NAS.
   a) Please select the directories you created under "Volume from host".

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

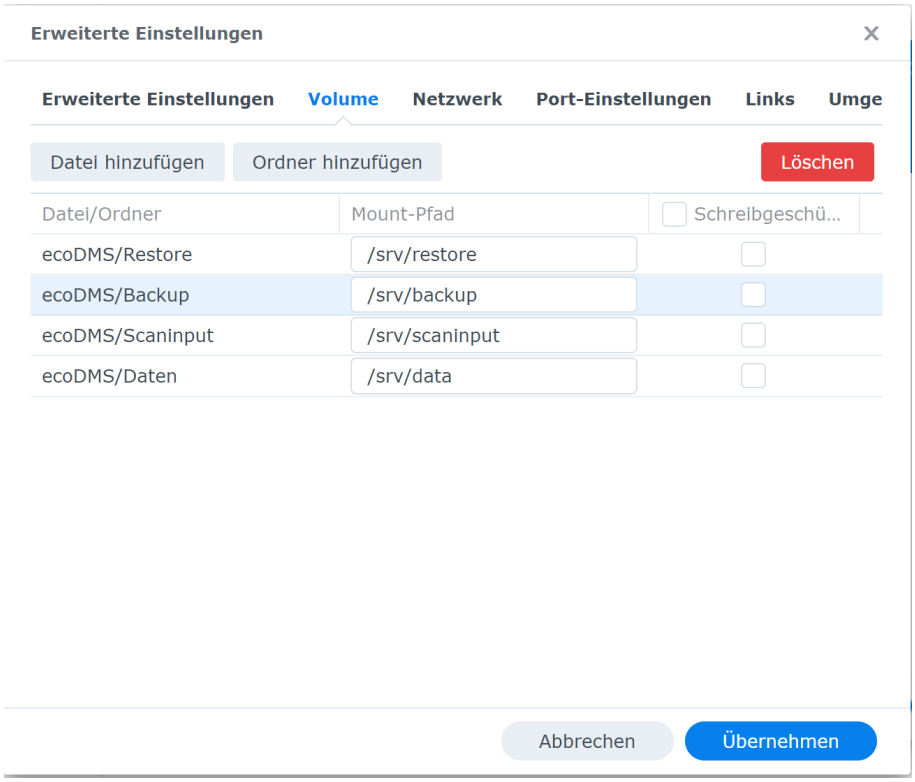

Figure 4.10: Synology - Extended Settings - ecoDMS Data Storage Location

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

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

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

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

```
/srv/scaninput
```

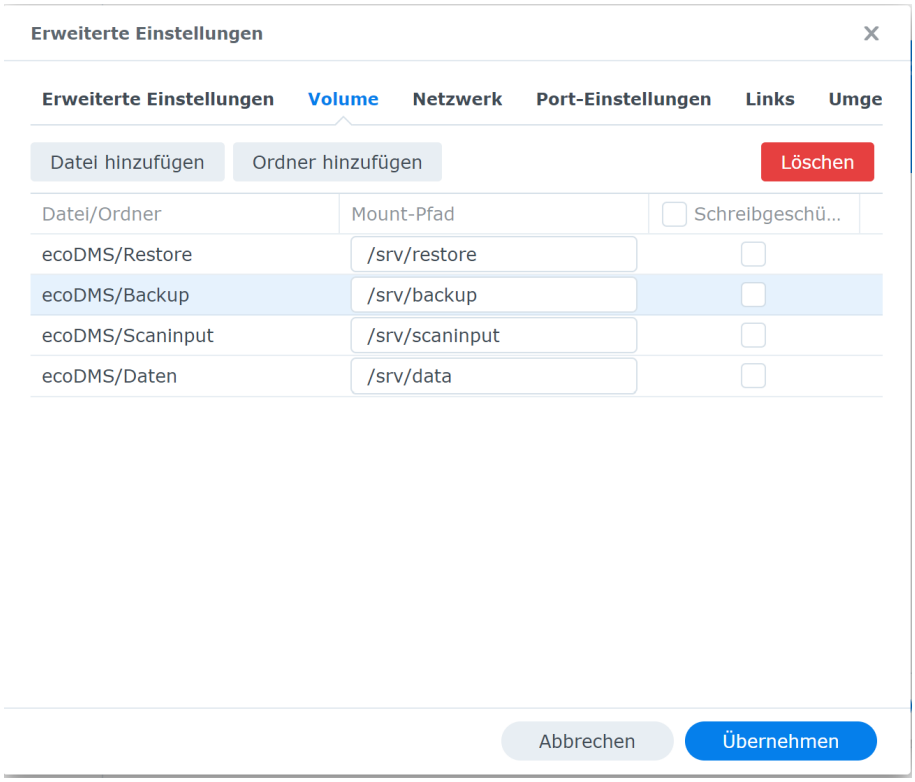

Figure 4.11: Synology - Extended Settings - Volume

4.3.7 Change Language (English)

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

```
LANG=eng
```

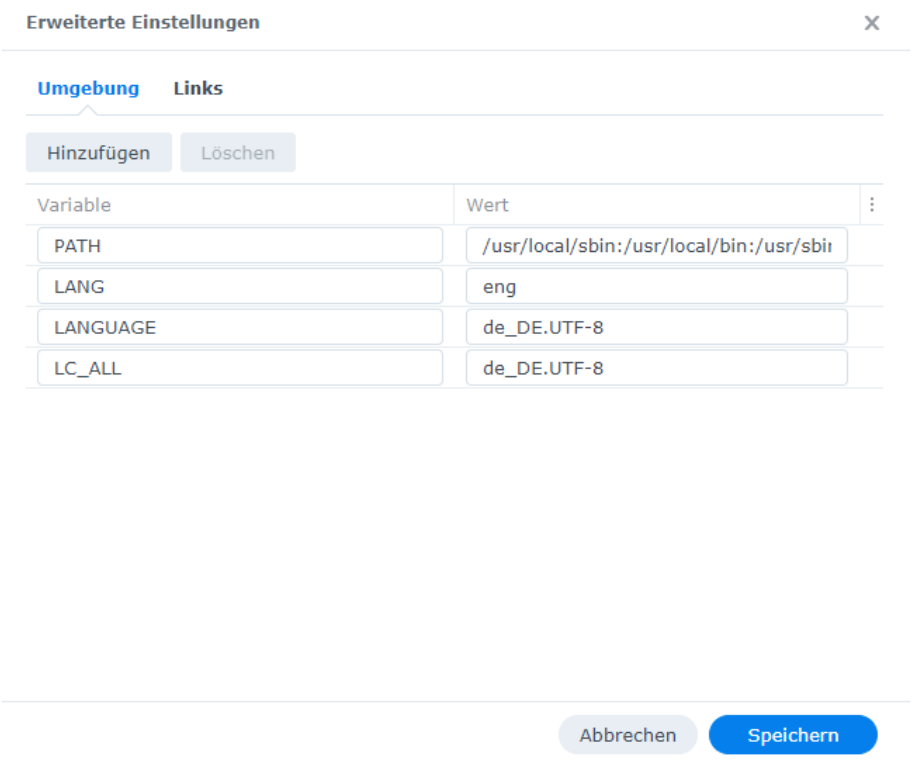

Figure 4.12: Synology - Extended Settings - Change Language (English)

4.3.8 Start Container

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

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

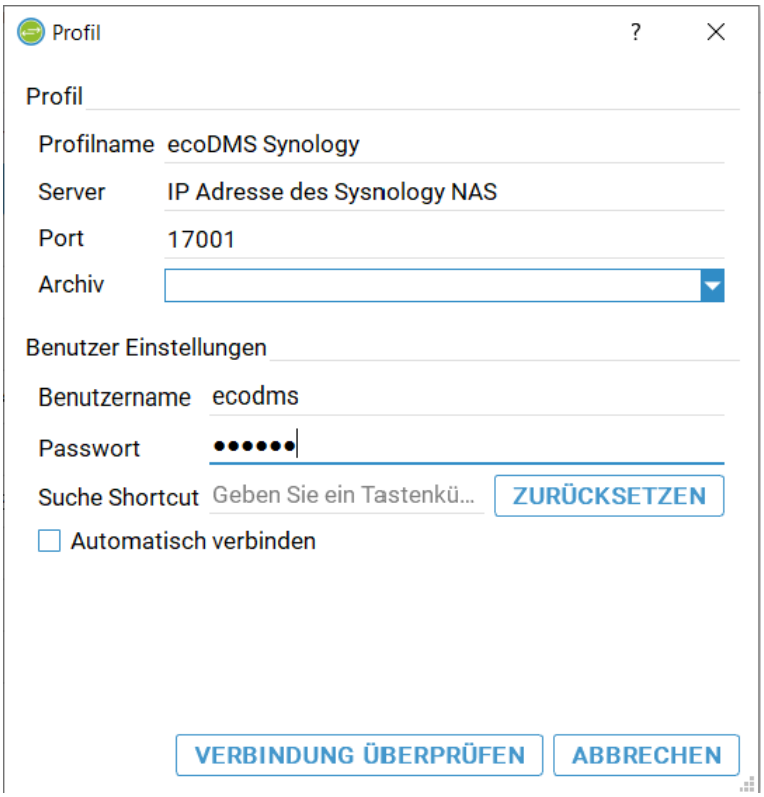

Figure 4.13: Synology - Connection Manager - Setup Connection

4.4 QNAP Installation (ecoDMS Server)

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

4.4.1 Create Folder Structure for ecoDMS (Example)

For a standard ecoDMS installation on a NAS you require

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

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

A typical folder structure could look like this:

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

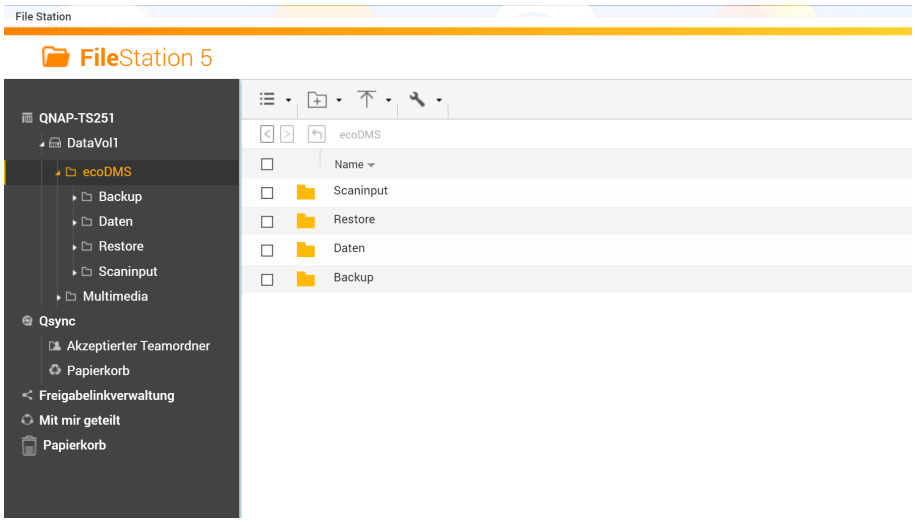

Figure 4.14: QNAP - Folder Structure (Example)

4.4.2 Install & Open ContainerStation

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

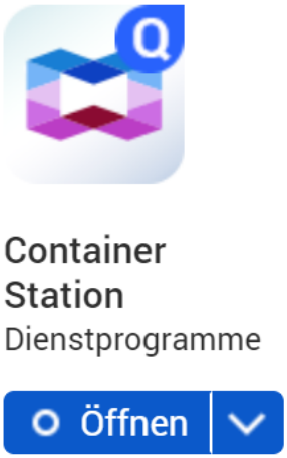

Figure 4.15: QNAP - AppCenter - Install ContainerStation

4.4.3 Search & Install ecoDMS Images

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

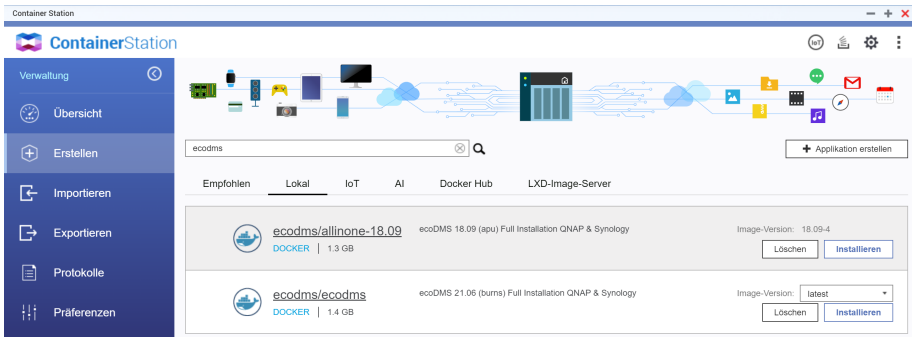

Figure 4.16: QNAP - ContainerStation - ecoDMS Image

4.4.4 Container Settings

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

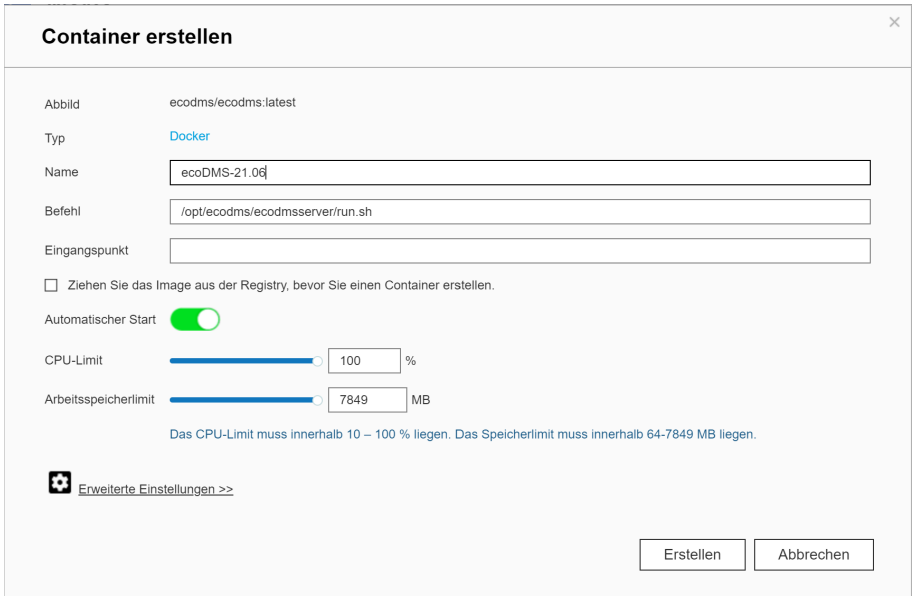

Figure 4.17: QNAP - Assign Container Name

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

Host	Container
17001	17001
17002	17002
17004	8080
17005	8180

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

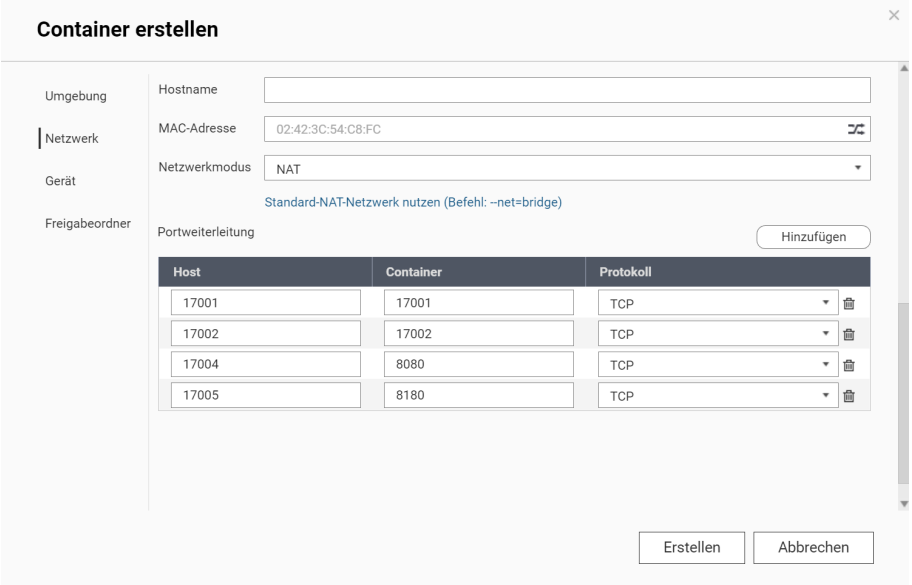

Figure 4.18: QNAP - Port Forwarding (Example)

4.4.5 Configure Mount Paths

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

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

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

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

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

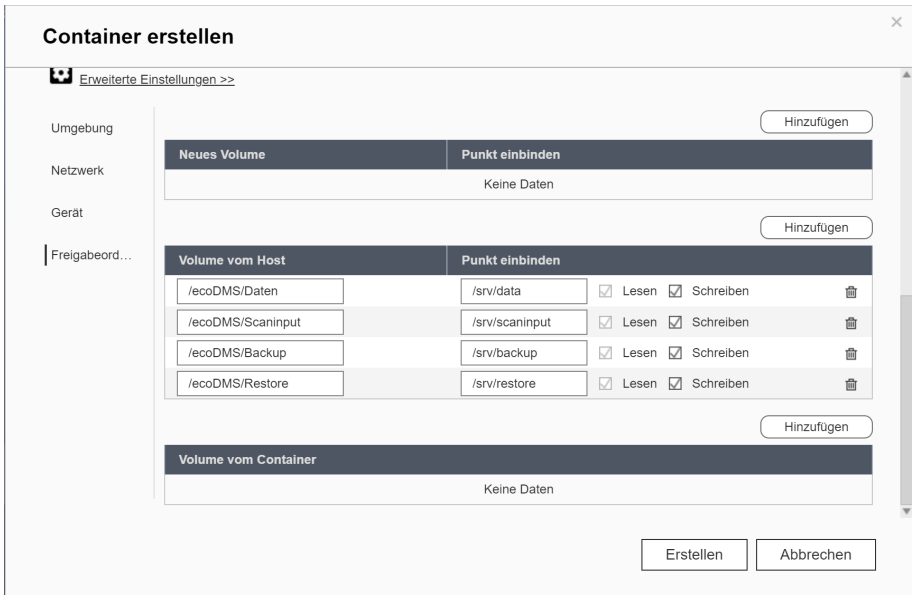

Figure 4.19: QNAP - Container - Storage Location

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

4.4.6 Change Language (English)

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

```
LANG=eng
```

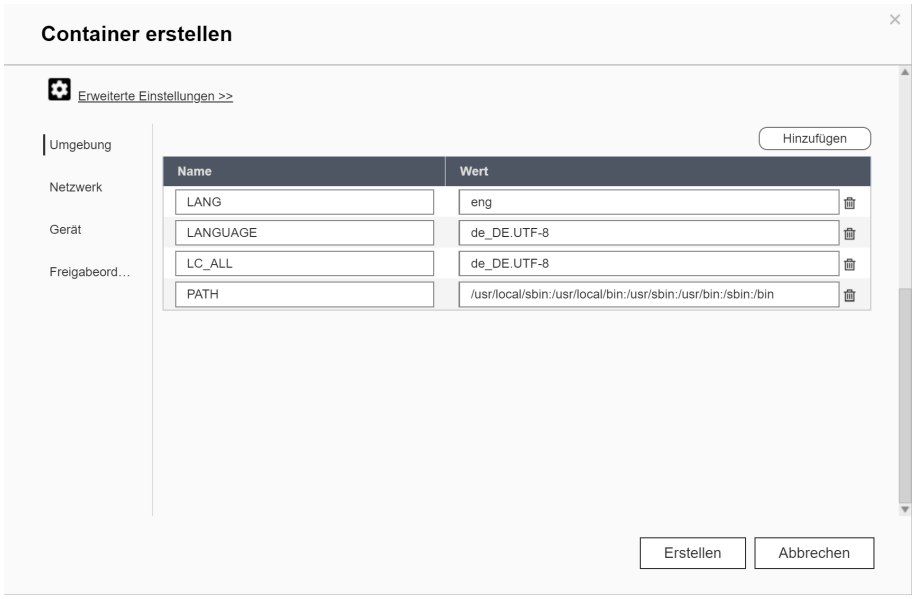

Figure 4.20: QNAP - Advanced Container Settings - Change Language

4.4.7 Start Container

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

1. You can connect to ecoDMS via the selected port (here: 17001; refer to the section "Container Settings") at the QNAP IP address.

a) Enter this address as "Server" in the connection manager.

2. Upon initial starting, it may take a while until the system can access ecoDMS.

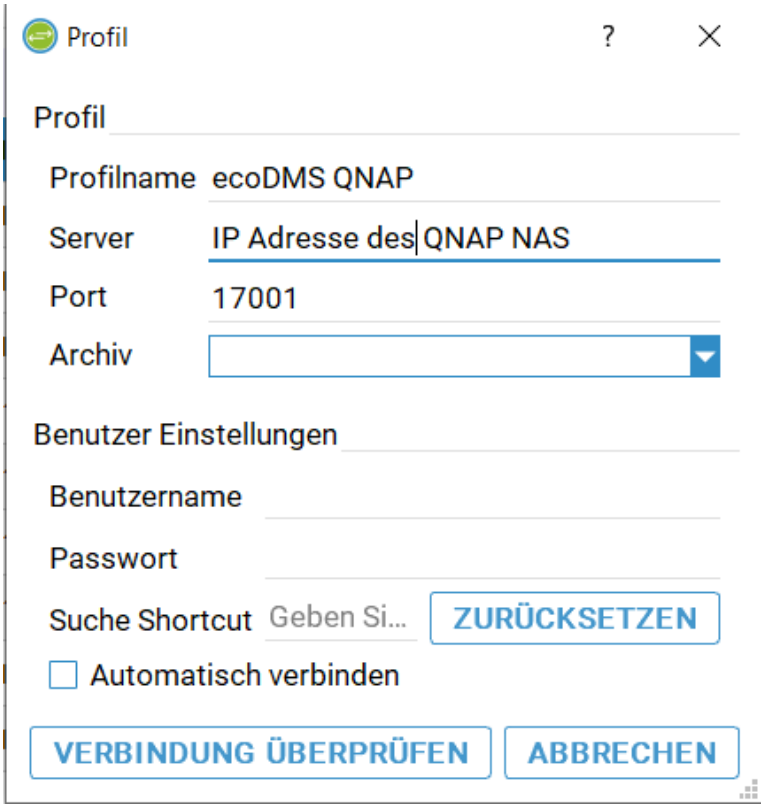

Figure 4.21: QNAP - Connection Manager - Setup Connection

5 macOS

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

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

5.1 Upgrade

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

5.2 Installation

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

5.2.1 ecoDMS Client

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

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

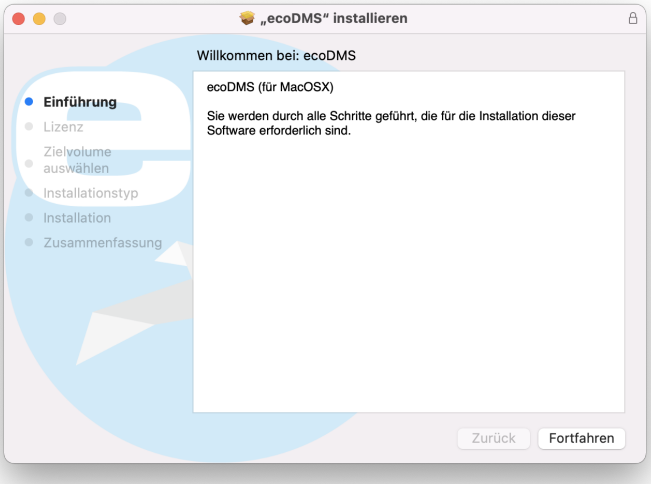

Figure 5.1: macOS Client: Introduction

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

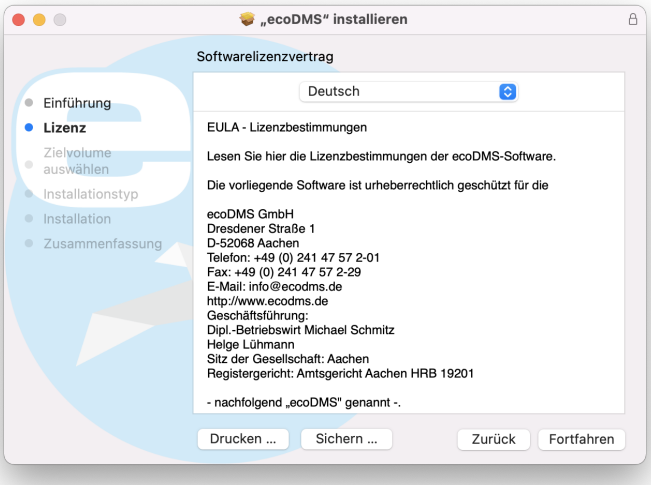

Figure 5.2: macOS Client: Language and License

6. Confirm the license agreement with "Agree".

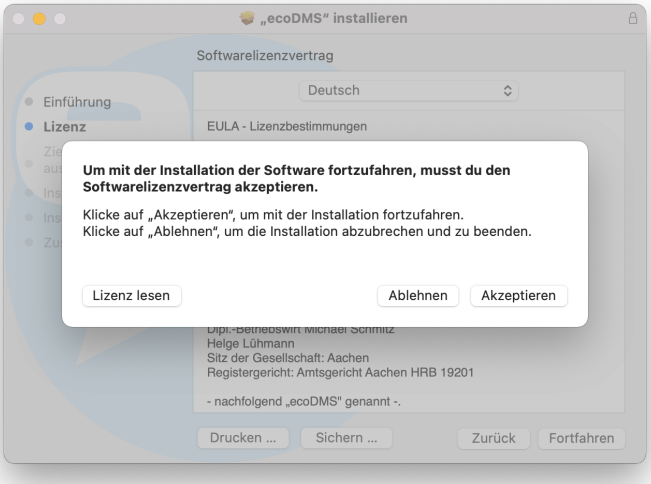

Figure 5.3: macOS Client: Accept License Agreement

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

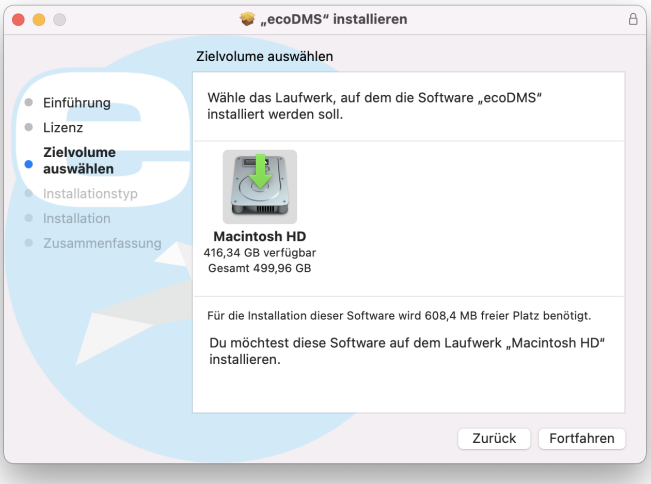

Figure 5.4: macOS Client: Installation Disk

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

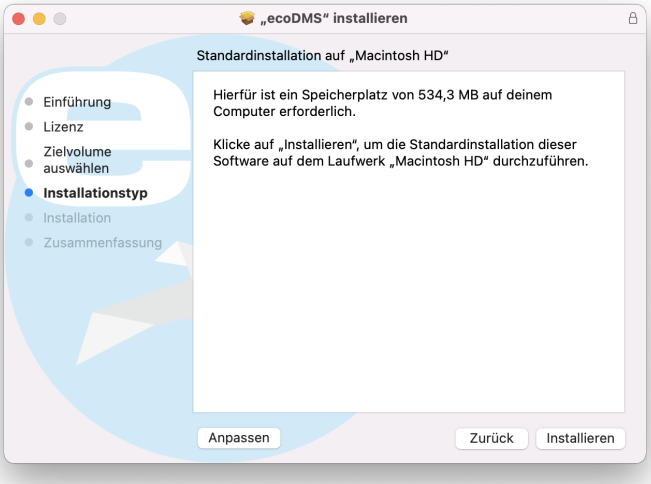

Figure 5.5: macOS Client: Installation

Figure 5.6: macOS Client: Enter Access Data

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

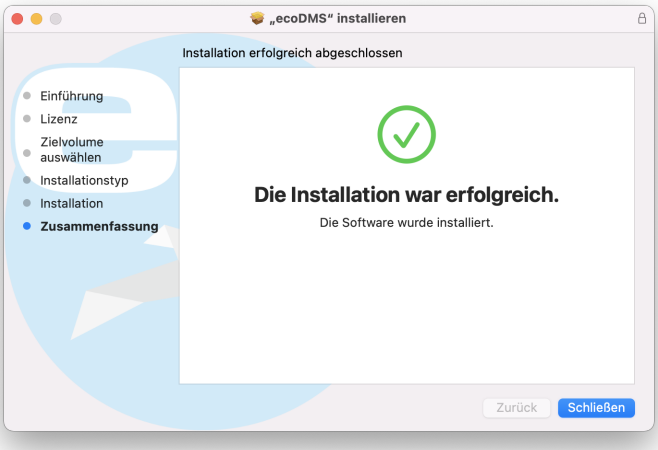

Figure 5.7: macOS Client: Installation Complete

5.3 Uninstall

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

5.3.1 ecoDMS Client

Connections: Exit all active ecoDMS connections and clients and close all connection managers on the corresponding workstation.

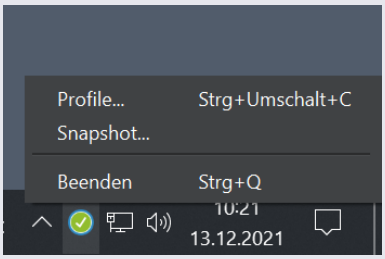

Figure 5.8: Please Exit Connection Manager

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

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

6 Login

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

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

7 Plugins, Add-ons

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

7.1 Installation

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

7.1.1 Microsoft Office Add-in (2.1.2) | Windows

Use this installation file to install the ecoDMS Microsoft Office Add-in. Then you can archive directly from the supported Office applications via the plugin. The following explains the installation process of the ecoDMS Microsoft Office Add-in under Windows.

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

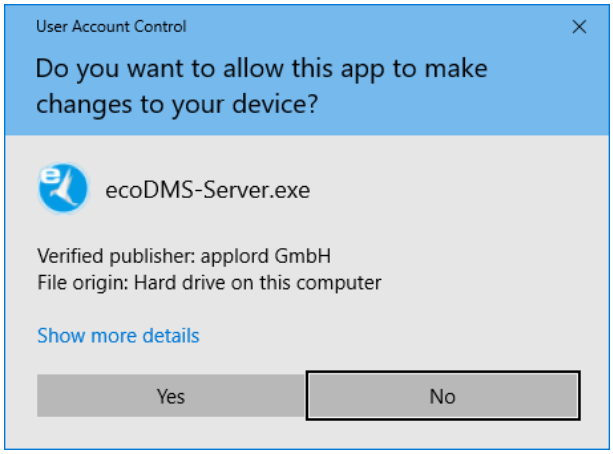

Figure 7.1: Windows Confirmation Prompt - Microsoft Office Add-in

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

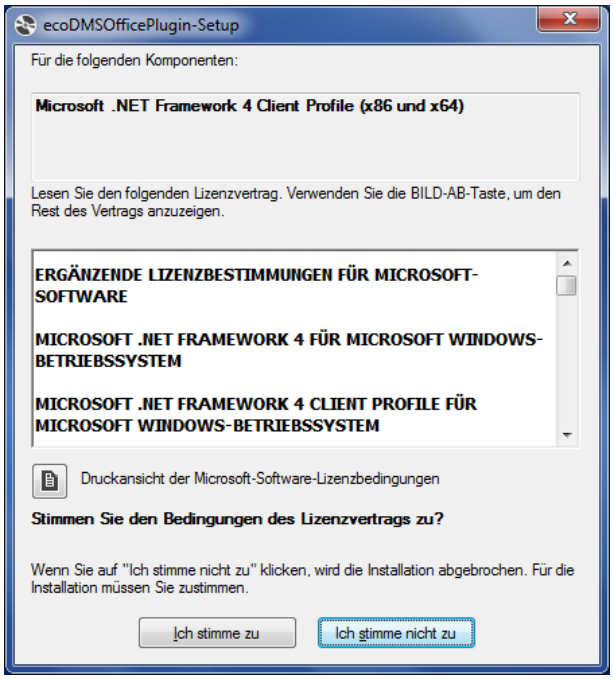

Figure 7.2: Microsoft Office Add-in - License: Framework

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

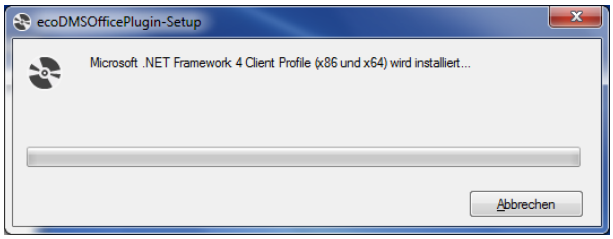

Figure 7.3: Microsoft Office Add-in - Installation Framework

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

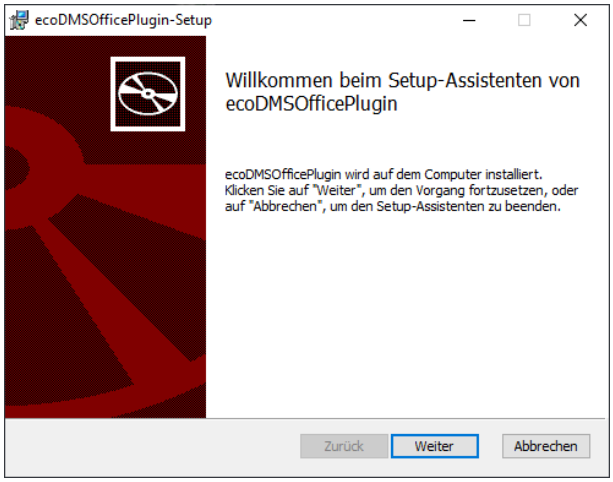

Figure 7.4: Microsoft Office Add-in - Start Setup Wizard

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

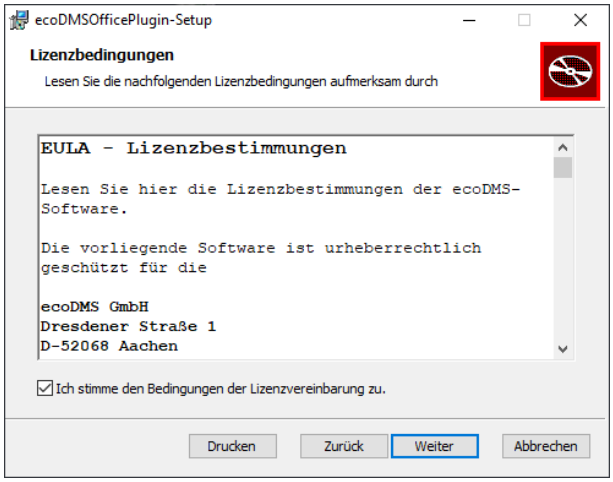

Figure 7.5: Microsoft Office Add-in - ecoDMS License Agreement

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

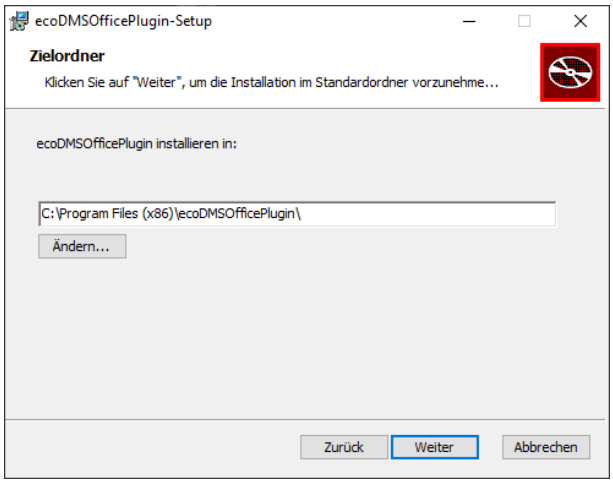

Figure 7.6: Microsoft Office Add-in - Installation Destination

11. Click "Install" to start the installation.

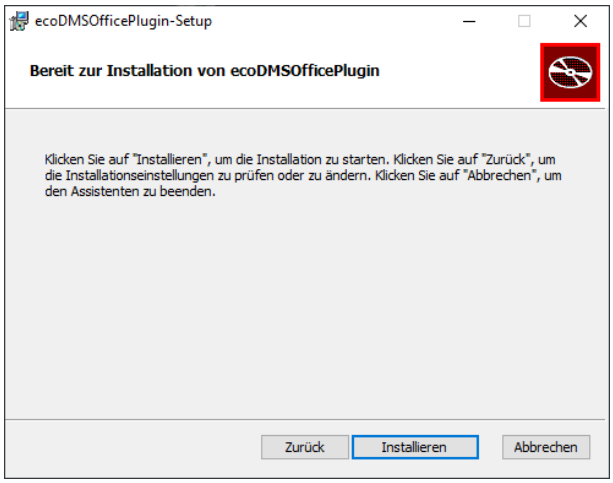

Figure 7.7: Microsoft Office Add-in - Start Installation

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

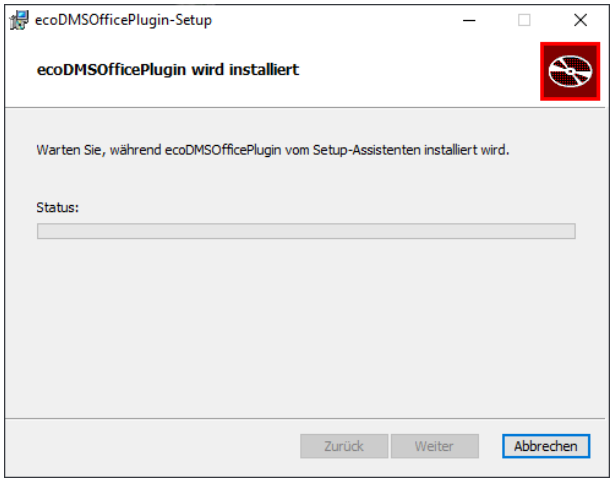

Figure 7.8: Microsoft Office Add-in - Installation

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

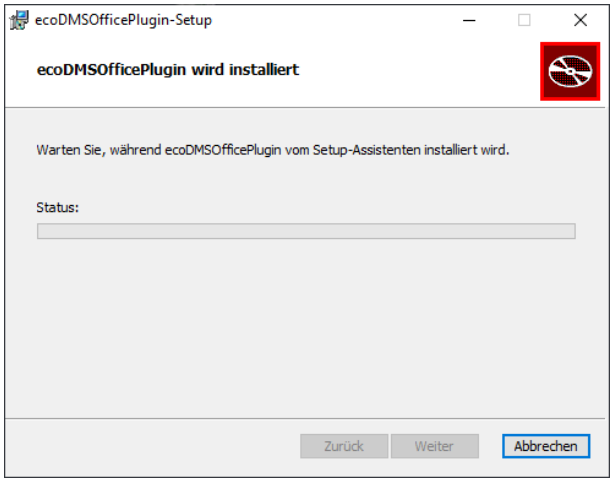

Figure 7.9: Microsoft Office Add-in - Finish Installation

14. You can restart the MS Office programmes now.

7.1.2 Libre- + OpenOffice Add-on (1.0.6)| Windows, Linux, macOS

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

7.1.2.1 Java Activation

To install and use the ecoDMS Office add-on, Java must be enabled in LibreOffice / OpenOffice. To do this, complete the following steps.

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

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

6. Confirm the message with "OK".

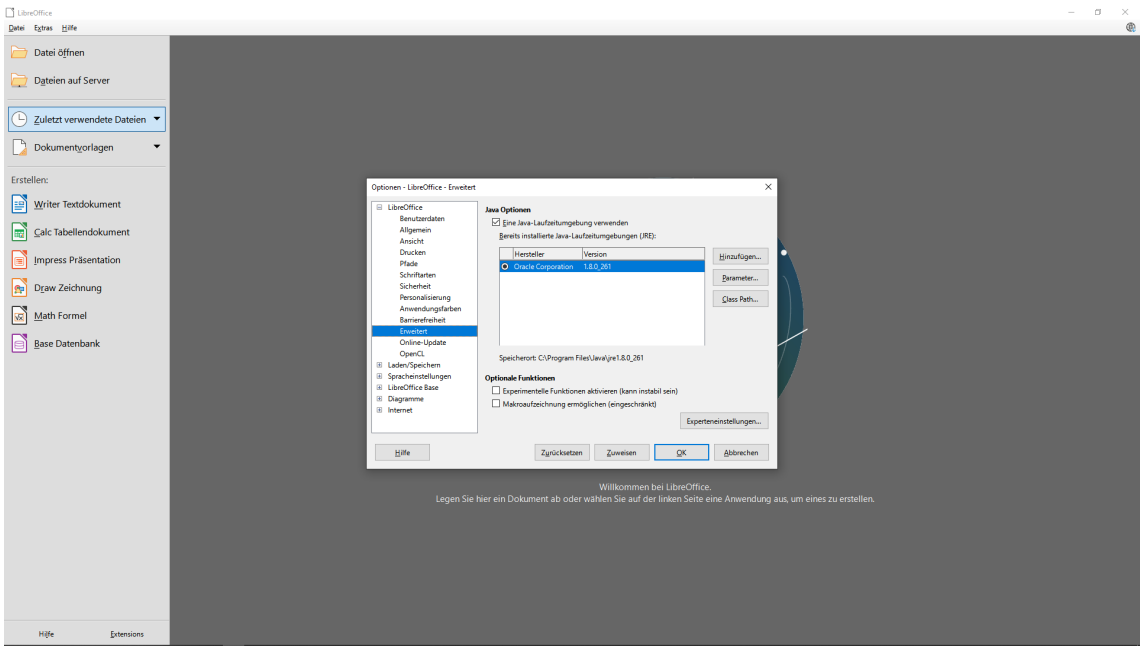

Figure 7.10: Enable Java in Office

7.1.2.2 Install Add-on

If Java is enabled, you can install the add-on with the following steps.

1. Download the file for the LibreOffice / OpenOffice Add-on at ecodms.de.
2. If this is a ZIP-file, unzip it first.
3. Start one of the Office Programs (here: LibreOffice general).
4. Click "Menu - Extras - Extension Manager".
5. Click the "Add" button in the "Extension Manager".
6. Select the "OXT file" for the "ecoDMSAdd-on" and click "Open".
7. Confirm any confirmation prompt according to your installation needs.
8. The installation is complete. You must restart the programme for the final activation of the add-on.

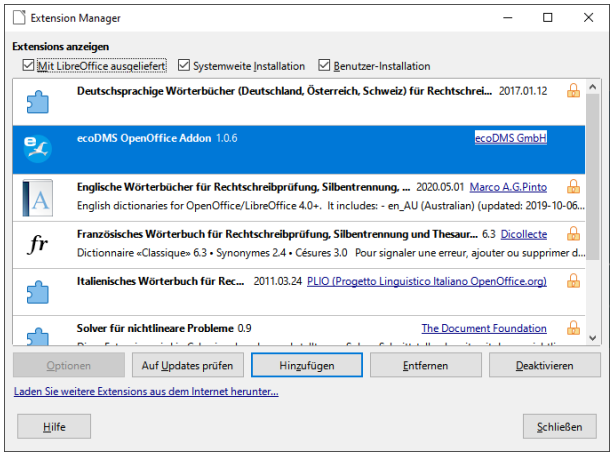

Figure 7.11: LibreOffice: Installation Complete

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

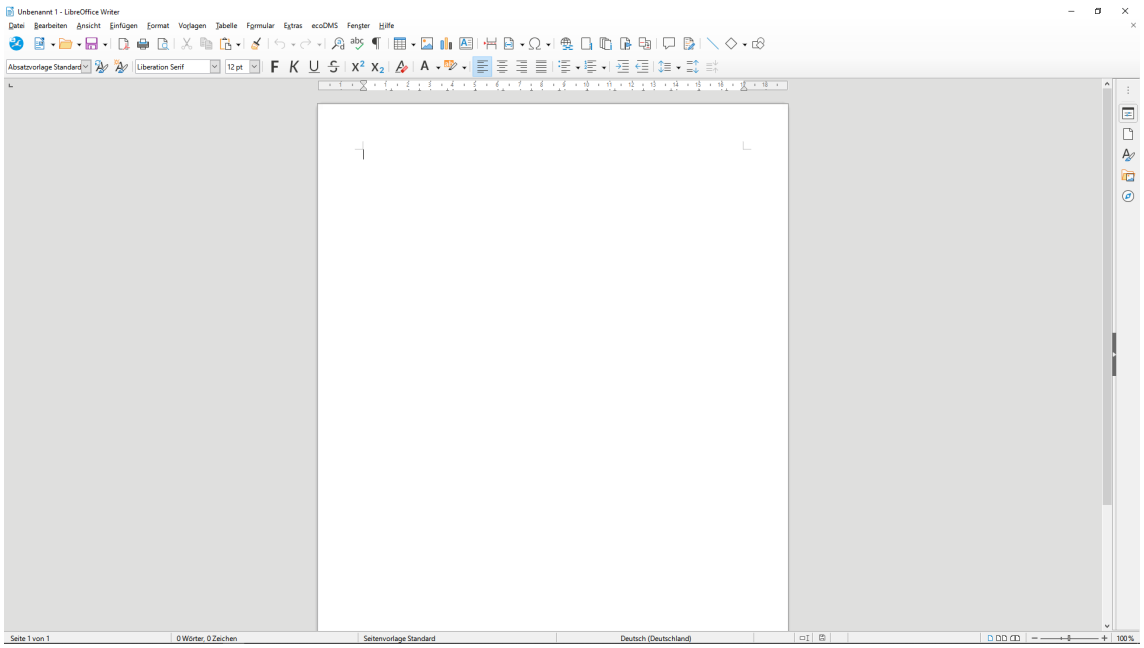

Figure 7.12: LibreOffice: ecoDMS Add-on (here: Writer)

7.1.3 Thunderbird Add-on (3.0.3)| Windows, Linux, macOS

You can import this ecoDMS add-on directly in Thunderbird through the Add-on Manager. Then you can directly archive the incoming and outgoing emails including attachments from Thunderbird via the add-on. The following explains the installation process of the ecoDMS Thunderbird add-on under Windows, Linux distribution and macOS.

1. Download the file for the Thunderbird add-on at ecodms.de
   a) Please also note: The Thunderbird add-on requires the latest version of the ecoDMS Printer
2. If this is a ZIP-file, unzip it first
3. Start Thunderbird
4. Open the "Add-on Manager" in Thunderbird: Menu -> Add-ons
5. Now click the Gear icon and select "Install add-on from file..."

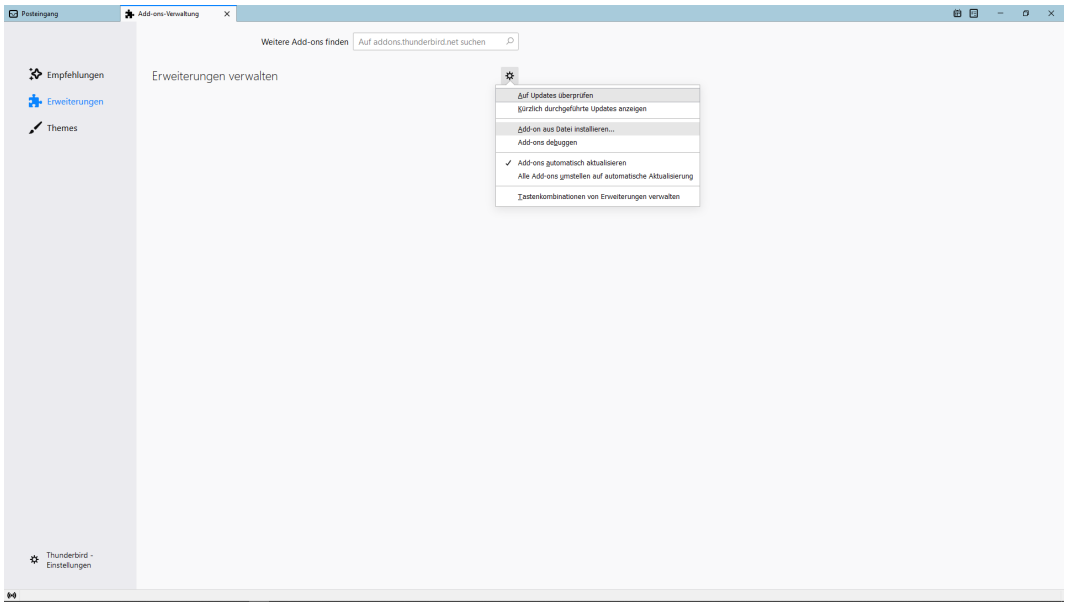

Figure 7.13: Thunderbird: Install Add-On from File

6. Select the "XPI" file for the "ecoDMSThunderbirdAdd-on" and click "Open"
7. Confirm the Thunderbird confirmation prompt and click "Add" to start the installation

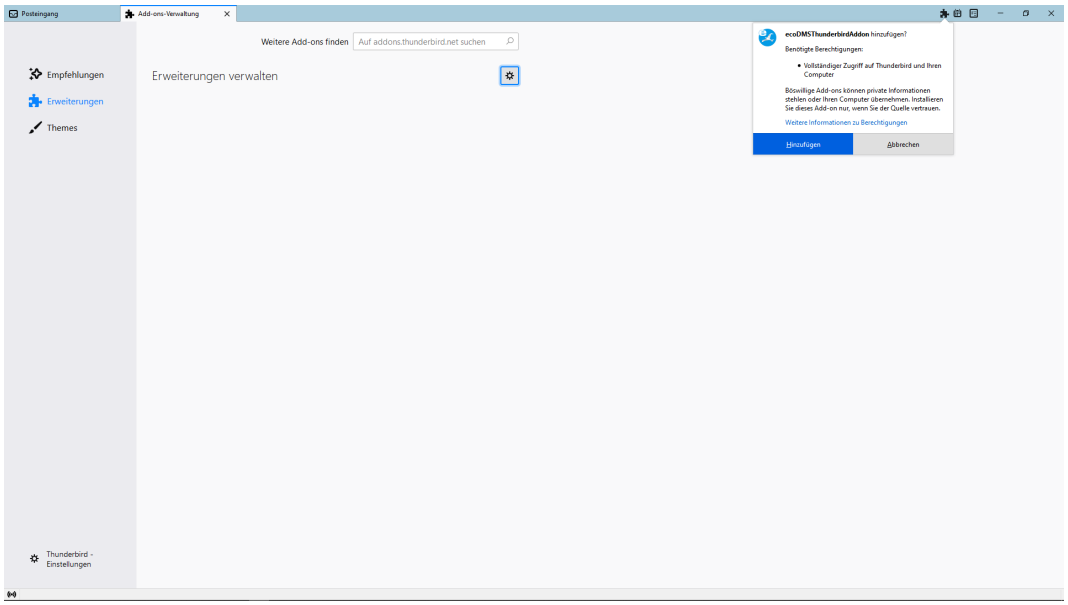

Figure 7.14: Thunderbird: Confirmation Prompt

8. The installation is now complete
   a) We recommend you restart Thunderbird

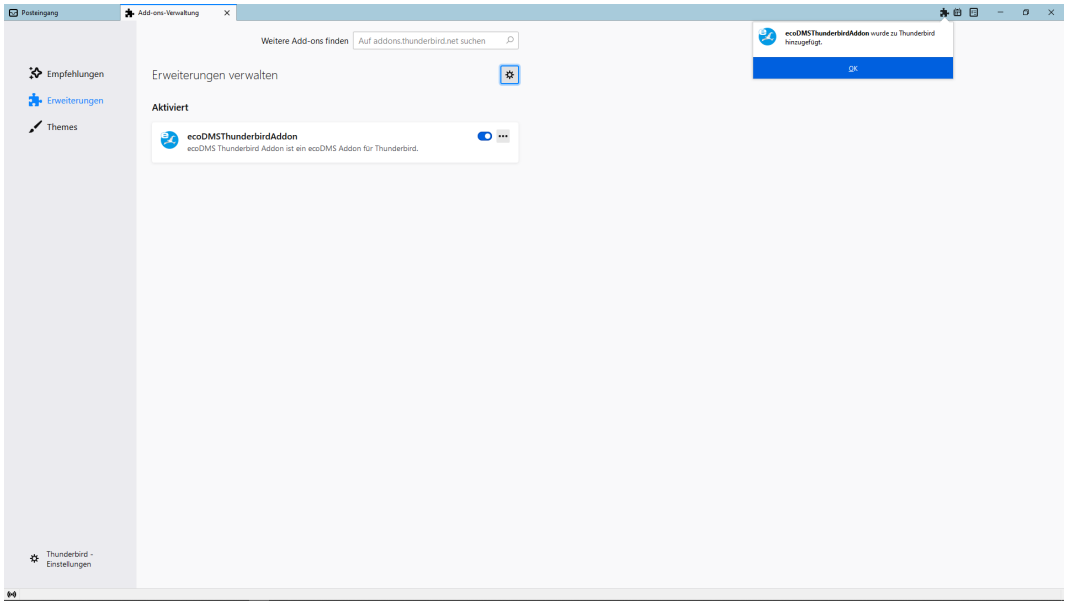

Figure 7.15: Thunderbird: Restart

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

7.1.4 ecoMAILZ Plugin (1.0.3) for ecoDMS (burns) | Windows

- The ecoMAILZ plugin requires a license for the ecoDMS full version and an installed ecoDMS PDF/A printer.
- Install the ecoMAILZ plugin on your ecoDMS workstation (not on ecoDMS Server).
- Before installation, exit ecoDMS on the relevant workstation. You must also exit the Connection Manager.

Use this installation file to install the ecoMAILZ plugin in the ecoDMS document management system under Windows.

1. Download the ecoMAILZ plugin from the ecoMAILZ download area at www.ecodms.de.

   - The ecoMAILZ plugin for ecoDMS consists of 2 files.
   - ecodmsmailzplugin.edp
     - This is the actual plugin for ecoDMS.
     - The default language of the plugin is English.
   - ecodmsmailzplugin_de.qm
     - This is the German language file for the ecoDMS plugin.
     - If you want to install ecoMAILZ in English, you can leave out the language file.

2. Copy the files to the plugin folder of the ecoDMS Client.

   The plugin folder is located in the selected target folder of your ecoDMS client installation. For example:

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

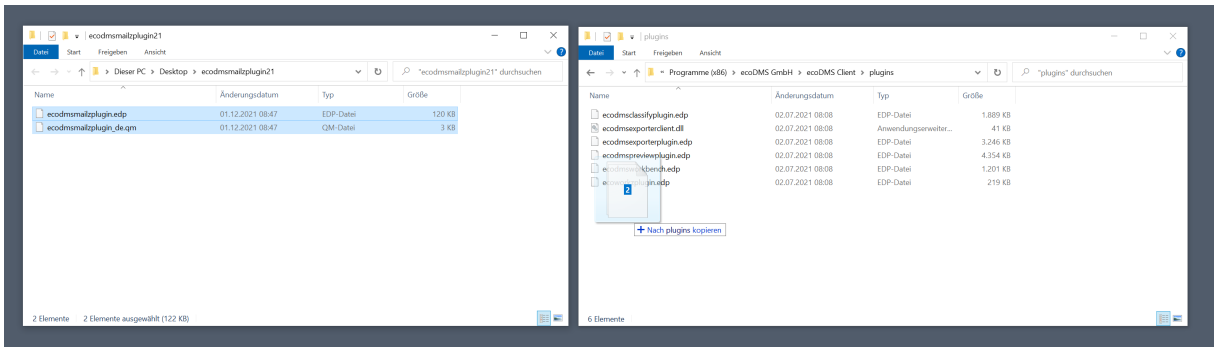

Figure 7.16: Install ecoMAILZ Plugin in ecoDMS - Copy Files to ecoDMS Plugin Folder

3. Adding files to the ecoDMS folder requires administrator permission. Click "Continue" to confirm the Windows confirmation prompt.

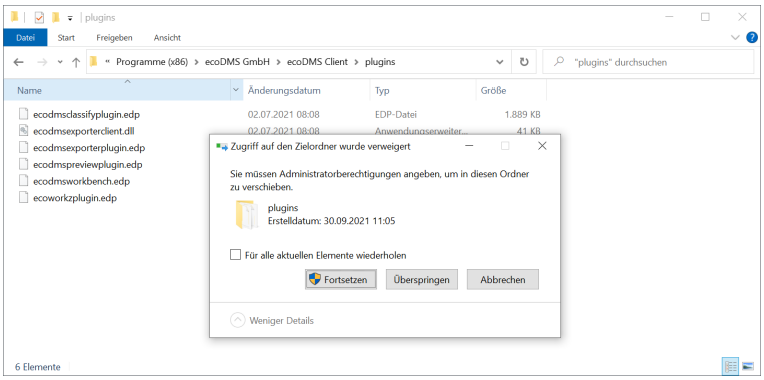

Figure 7.17: nstall ecoMAILZ Plugin in ecoDMS - Copy files into ecoDMS Folder

4. The files are now copied to the folder. This process may take a while.
5. Now restart the Connection Manager and the ecoDMS Client.
6. In ecoDMS (burns), an ecoMAILZ tab displays on the left-hand side.
   a) You can find the ecoMAILZ settings in the main menu under "Plugins - ecoMAILZ".

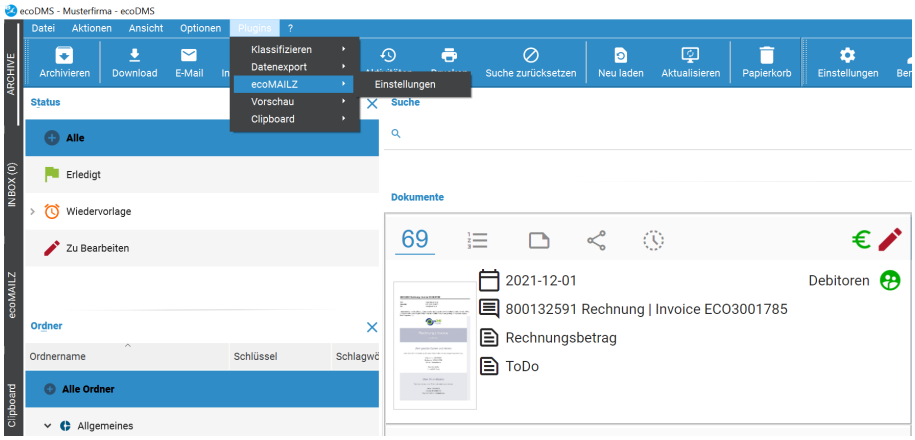

Figure 7.18: Install ecoMAILZ Plugin in ecoDMS - Display in ecoDMS (Configuration Prompt)

7. When you open ecoMAILZ for the first time, click "Set Up" in the ecoMAILZ window that displays.

   - **ecoMAILZ URL:** Enter the link to ecoMAILZ. The link usually consists of the IP address of the ecoMAILZ instance and the associated port. Example for local installation with default port:

     ```
     http://ecoMAILZ_IP_ADRESS:Port
     ```

     Example for local installation with default port:

     ```
     http://localhost:8888
     ```

   - **ecoMAILZ user:** Enter the user name of your own ecoMAILZ profile
     - (this can also be an email address, depending on the ecoMAILZ configuration)
   - **ecoMAILZ password:** Enter the appropriate password

   To establish the connection and open ecoMAILZ, click "OK". Click "Cancel" to close the process without saving.

8. ecoMAILZ in ecoDMS is now installed and configured.

a) You can now use the ecoMAILZ plugin on your computer.
b) Refer to the ecoMAILZ manual for more information on ecoMAILZ features + information about login credentials.

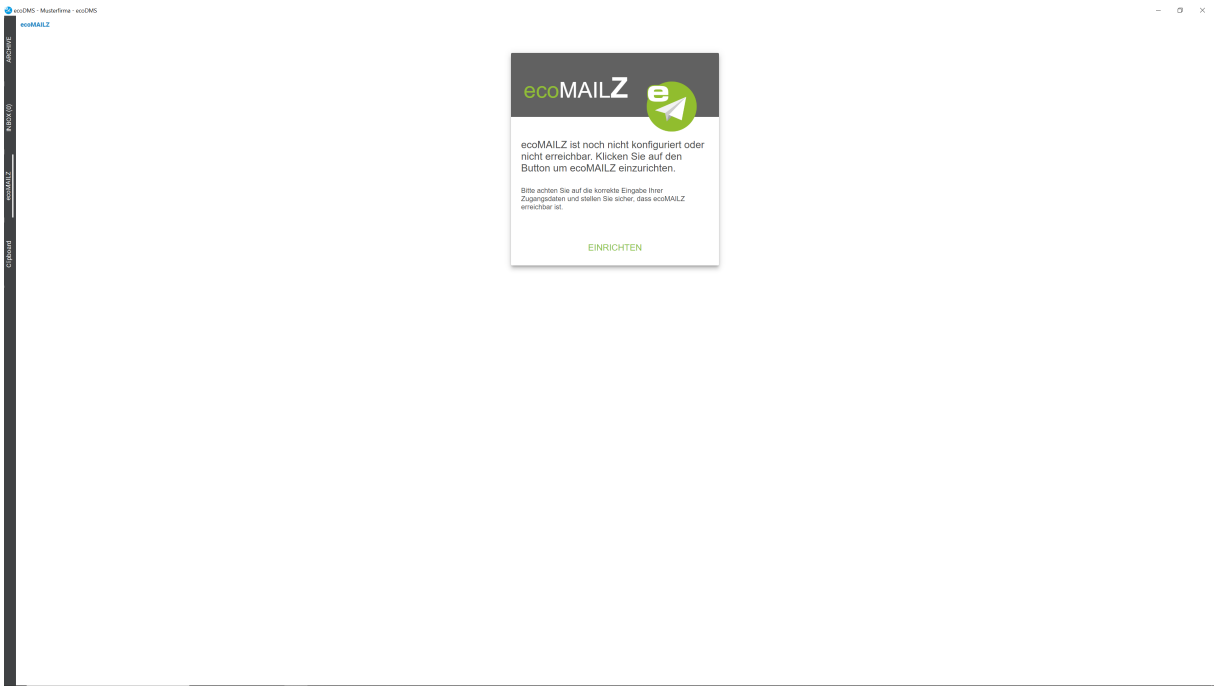

Figure 7.19: Install ecoMAILZ Plugin in ecoDMS - Display in ecoDMS (Configuration Prompt)

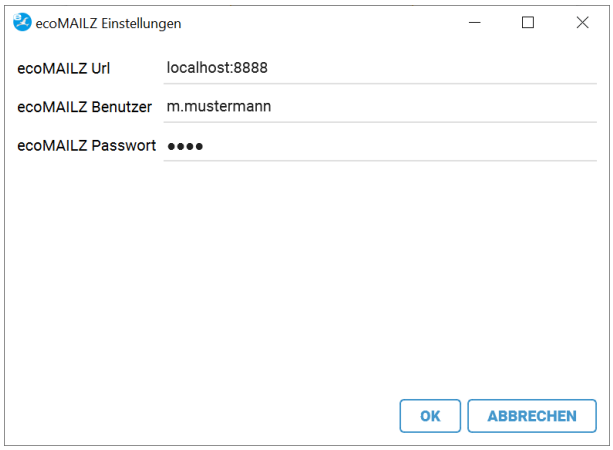

Figure 7.20: ecoMAILZ Plugin in ecoDMS - ecoMAILZ Settings (Here: Local Installation)

7.1.5 ecoMAILZ Plugin (1.0.3) for ecoDMS (burns) | Linux

- The ecoMAILZ plugin requires a license for the ecoDMS full version and an installed ecoDMS PDF/A printer.
- Install the ecoMAILZ plugin on your ecoDMS workstation (not on ecoDMS Server).
- Before installation, exit ecoDMS on the relevant workstation. You must also exit the Connection Manager.

ecoMAILZ Plugin for the ecoDMS Document Management System
You can find the entry for the sources.list of the ecoMAILZ plugin, which you can install for your ecoDMS (document management system), in chapter 3.2.2 of the ecoDMS installation manual. The entries comply with the ecoDMS installation. If you have already installed ecoDMS, you do not need to update this entry. You can start installing the ecoMAILZ plugin for ecoDMS straight away.

This section describes the installation of the ecoMAILZ plugin under Linux in the ecoDMS document management system.

1. Open the console.
2. Start the installation with

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

3. Confirm the displayed questions / warnings with YES by entering Y
   [...]Do you want to continue?[...]
   [...]Do you want to install these packages without checking?[...]
   a) This process may take a while.
4. Read the license agreement carefully and confirm.
   – Use the Tab key to skip to "OK" and confirm with "Enter".
5. The installation is executed. This operation may take a while.
6. Now restart the Connection Manager and the ecoDMS Client.
7. In ecoDMS (burns), an ecoMAILZ tab displays on the left-hand side.
   a) You can find the ecoMAILZ settings in the main menu under "Plugins - ecoMAILZ".

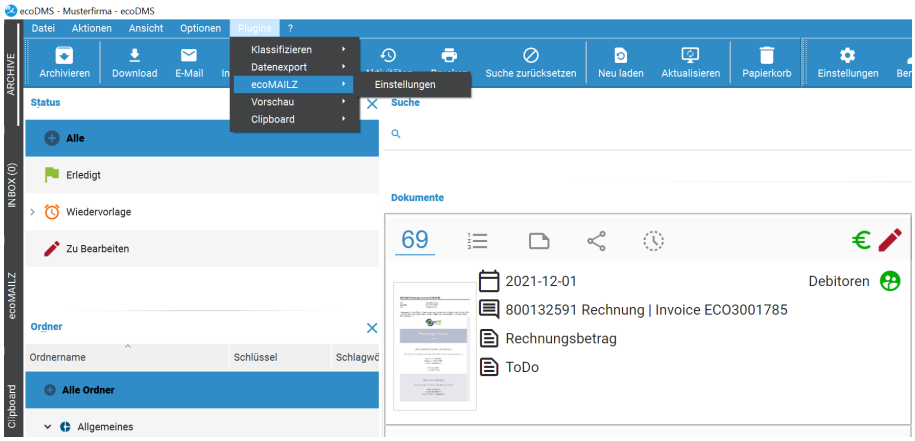

Figure 7.21: Install ecoMAILZ Plugin in ecoDMS - Display in ecoDMS (Configuration Prompt)

8. When you open ecoMAILZ for the first time, click "Set Up" in the ecoMAILZ window that displays.

- **ecoMAILZ URL:** Enter the link to ecoMAILZ. The link usually consists of the IP address of the ecoMAILZ instance and the associated port. Example for local installation with default port:

  ```
  http://ecoMAILZ_IP_ADRESS:Port
  ```

  Example for local installation with default port:

  ```
  http://localhost:8888
  ```

- **ecoMAILZ user:** Enter the user name of your own ecoMAILZ profile
  - (this can also be an email address, depending on the ecoMAILZ configuration)
- **ecoMAILZ password:** Enter the appropriate password

To establish the connection and open ecoMAILZ, click "OK". Click "Cancel" to close the process without saving.

9. ecoMAILZ in ecoDMS is now installed and configured.

a) You can now use the ecoMAILZ plugin on your computer.
b) Refer to the ecoMAILZ manual for more information on ecoMAILZ features + information about login credentials.

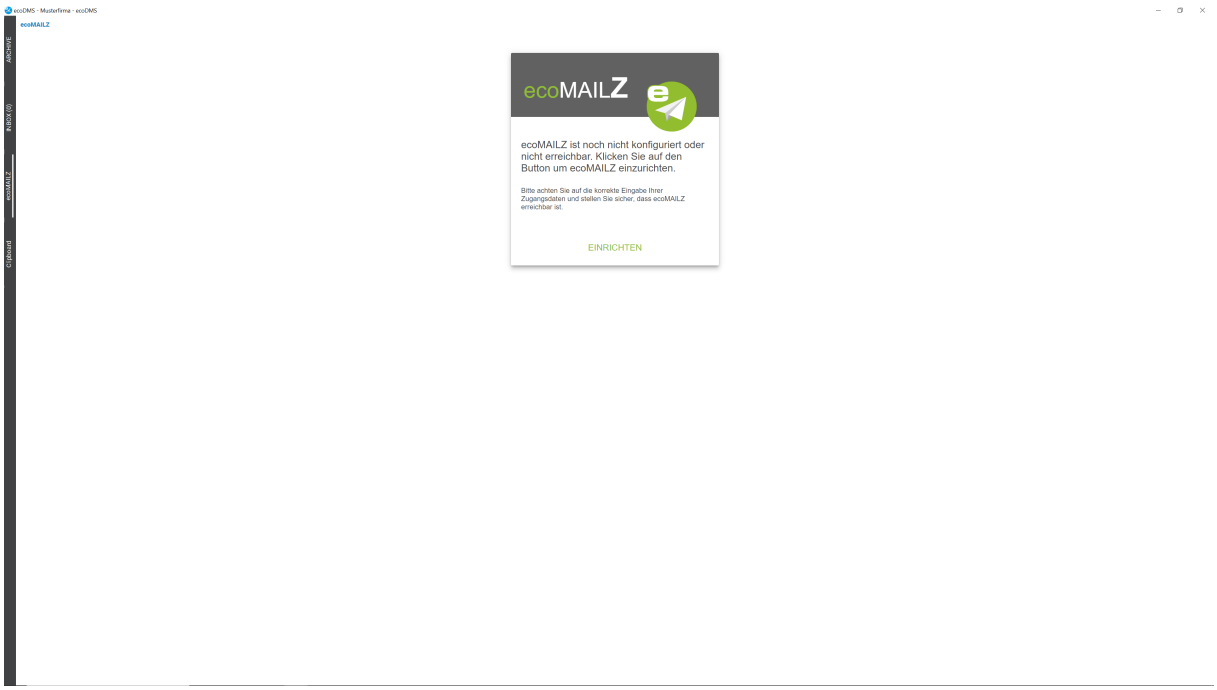

Figure 7.22: Install ecoMAILZ Plugin in ecoDMS - Display in ecoDMS (Configuration Prompt)

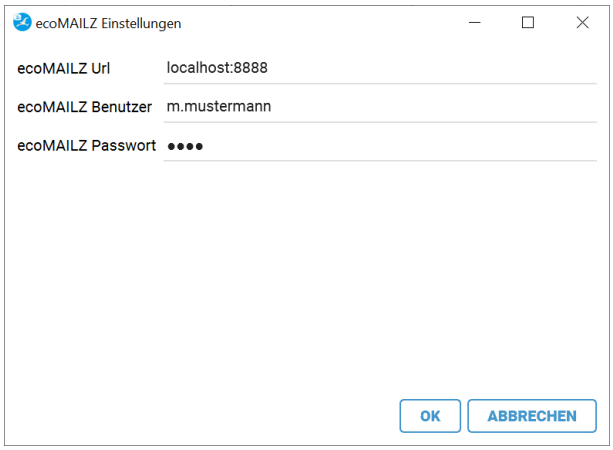

Figure 7.23: ecoMAILZ Plugin in ecoDMS - ecoMAILZ Settings (Here: Local Installation)

7.2 Uninstall

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

7.2.1 Microsoft Office Add-in (2.1.2) | Windows

The following explains the uninstall process of the ecoDMS Microsoft Office Add-in under Windows.

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

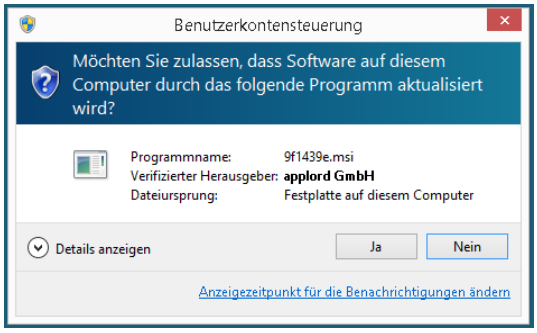

Figure 7.24: User Account Control – Microsoft Office Add-in

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

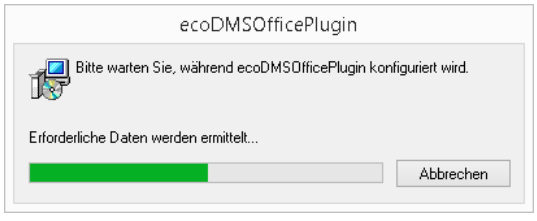

Figure 7.25: Microsoft Office Add-in - Uninstallation: Preparation & Execution

6. The uninstallation is complete and the "ecoDMS Microsoft Office Add-in" has been removed from your system.

7.2.2 Libre- + OpenOffice Add-on (1.0.6)| Windows, Linux, macOS

The following explains the uninstall process of the ecoDMS LibreOffice and OpenOffice Add-on under Windows.

1. Start one of the Office programmes (here: LibreOffice general).
2. Click "Menu - Extras - Extension Manager".
3. Select the "ecoDMS OpenOffice Add-on" in the "Extension Manager" and click the "Remove" button.
4. Confirm the confirmation prompt for the uninstallation with "OK".
5. You have now uninstalled the add-on. Restart the programme to remove the plugin completely.

7.2.3 Thunderbird Add-on (3.0.3)| Windows, Linux, macOS

The following explains the uninstall process of the ecoDMS Thunderbird Add-on under Windows.

1. Start Thunderbird.
2. Click "Menu - Tools - Add-ons".
3. Select the "ecoDMSThunderbirdAdd-on" extension in the "Add-Ons Manager" and click the "Remove" button.
4. Restart Thunderbird to finalise the uninstall process and to remove the function completely. To do so, click "Restart Now".

7.2.4 ecoMAILZ Plugin (1.0.3) for ecoDMS (burns) | Windows

- Uninstall the ecoMAILZ plugin on your ecoDMS workstation (not on ecoDMS Server).
- Before uninstalling, exit ecoDMS on the relevant workstation. You must also exit the Connection Manager.

1. Remove the files from the plugin folder of the ecoDMS client.

   The plugin folder is located in the selected target folder of your ecoDMS client installation. For example:

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

2. Using the administrator privileges, remove the following files from the plugin folder:

   - The ecoMAILZ plugin for ecoDMS consists of 2 files.
   - ecodmsmailzplugin.edp
     - This is the actual plugin for ecoDMS.
     - he default language of the plugin is English.
   - ecodmsmailzplugin_de.qm
     - This is the German language file for the ecoDMS plugin.
     - If ecoMAILZ is installed in English, the German language file is not in the folder.

3. Confirm the Windows confirmation prompt with "Continue".
4. The files are now removed from the folder. This process may take a while.
5. ecoMAILZ in ecoDMS is now uninstalled.

7.2.5 ecoMAILZ Plugin (1.0.3) for ecoDMS (burns) | Linux

- Uninstall the ecoMAILZ plugin on your ecoDMS workstation (not on ecoDMS Server).
- Before uninstalling, exit ecoDMS on the relevant workstation. You must also exit the Connection Manager.

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

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

8 Backup / Restore

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