ecoDMS

MANUAL

Imprint

Contents

1 Getting started with ecoDMS (burns)

ecoDMS is a document management system for document archiving and management. This Getting Started guide explains what you need to do to start working with ecoDMS.

Figure 1.1: ecoDMS: Document Management System

1.1 Installation as standalone or network solution

1. To start with ecoDMS, install the software on a computer. It is important to note, that ecoDMS is a client-server system. First, install the server software on a computer which serves as the central storage for your documents, data, and configurations. Then install the client software on the user computers which want to access the documents.

2. The decision, whether to install ecoDMS as a standalone or a network solution depends on your requirements:

   a) For a standalone solution, install ecoDMS on a single computer and work only on this computer. Documents are saved to this computer and are only accessible to the user using this computer.

   b) For a network solution, install ecoDMS on a central server, which can be used by several users on different computers in the network. Documents are saved on the server and can be accessed by every user with the respective permissions.

3. When first installing ecoDMS under Windows, business customers and private individuals can automatically install default settings and use the software immediately. The default configuration contains example settings. Of course, these settings can be modified and/or executed manually. The default configuration does not include any documents. The configuration does contain a first selection of available document types and classification attributes.

   a) Customers who wish to install the default settings at a later date can download the necessary backup file in the download area of the ecoDMS website.

1.2 First login and server connection

1. To log in to ecoDMS for the first time, open the Connection Manager to start the connection via the desktop client.

2. Enter your user name, password, and server address to connect to the server and start managing your documents.

   a) As an administrator, use the following login credentials with all necessary permissions when you first login:
      – Username: ecodms
      – Password: ecodms

- – Server IP address:
    - – For a local standalone solution, you can use "localhost" as your server address.
    - – For a network application, you must enter the respective IP address for the ecoDMS server
- b) For security reasons, change the password for the default user as soon as you have logged in for the first time.
- c) For more information and default users, refer to the chapter "Access Data" in the ecoDMS manual.

The following figure shows example settings for the Connection Manager on a single seat local installation.

Figure 1.2: Connection Manager - Example Settings for Local Installation (Single Seat)

Figure 1.3: Connection Manager - Example Profile for Local Installation

1.3 User management and initial setup of structures

> **Information:** By configuring folders, document types, statuses, and users, and by specifying permissions, you can ensure that your documents are managed securely and effectively in ecoDMS. Use attributes wisely to simplify document management and retrieval. For these and more settings, refer to this ecoDMS manual.

You can setup ecoDMS to suit your requirements. To do so, complete the first step as follows:

1. Options - Users:

   a) Create users: In the ecoDMS client, create users to control access to your documents. Specify who can access which documents.

   b) Assign roles: Create roles in ecoDMS Client to group permissions for user groups. This allows you to manage permissions more efficiently.

   c) Specify permissions: In ecoDMS client, assign groups and roles (permissions) to users to specify who can execute which actions with documents.

2. Options - Settings:

   a) Create folders and document types: In ecoDMS Client, create folders and document types to better organize your documents. Make sure you differentiate between folders and document types.

      i. Examples for document types: Invoice, delivery note, agreement, policy, tax declaration, reminders, etc.

      ii. Examples for folders: Suppliers, customers, insurances, employees, etc.

   b) Simple structures: We recommend you keep the folder tree in ecoDMS as flat and simple as possible to enhance clarity and facilitate quick document retrieval.

   c) Employing classification attributes: Classification attributes in ecoDMS allow you to assign attributes or properties to every document without needing to create a separate folder. By using classification attributes, you can reduce the number of folders, which promotes clarity and quick retrieval.

1.4 Archiving documents in ecoDMS

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

> There are several ways of archiving documents in ecoDMS:
>
> – For example, you can use a scanner to scan and archive paper documents via the Inbox feature in ecoDMS.
>
> – You can also drag and drop documents from the file explorer to ecoDMS for long-term storage.
>
> – There are add-ons and plugins to archive documents and emails straight to ecoDMS from applications such as Microsoft Office and LibreOffice.
>
> – The version control feature lets you save and edit different document versions.
>
> For more information on archiving methods, refer to this ecoDMS manual.

1.4.1 Scan Process

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

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

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

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

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

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

1.4.2 Archive & Classify Digital Files

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

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

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

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

2 License Activation + Software Status

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

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

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

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

The purchased ecoDMS license is activated and managed by the administrator through the ecoDMS settings dialog. On the License in the Settings, you can display and manage your license information.
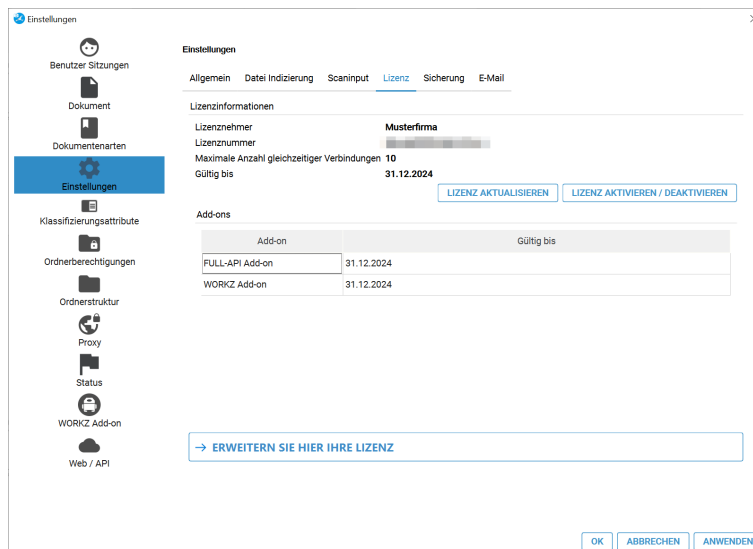
Figure 2.1: Settings - Settings - License (here: Full Version with Full API and WORKZ Add-on)
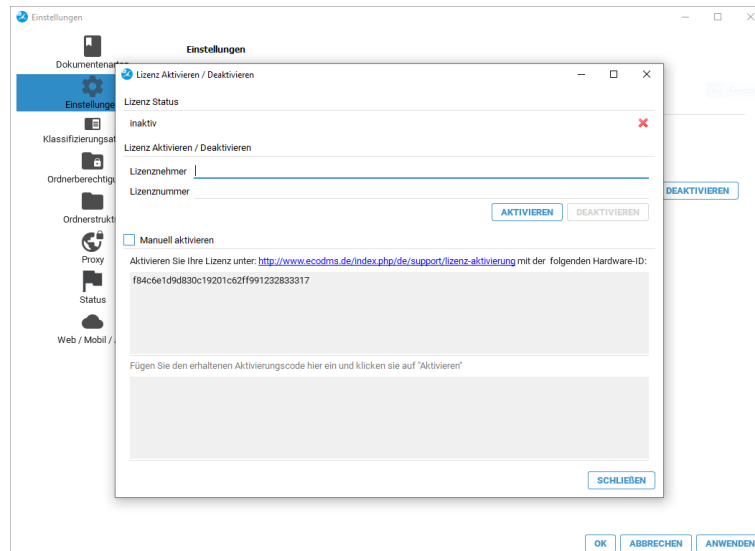
Figure 2.2: Settings- Settings - License Activation

2.1 Activate License via Settings dialog

The activation of a license is always permitted for one server instance. To activate the license for example for another server instance or after reinstallation you must first deactivate this license. To activate your license directly via the settings dialog, complete the following steps:

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

2. Click "Activate License".

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

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

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

4. Click "Activate".

    a) The license will be activated now.

5. Exit all ecoDMS programmes and reconnect all connected profiles via the Connection Manager (Disconnect / Connect).
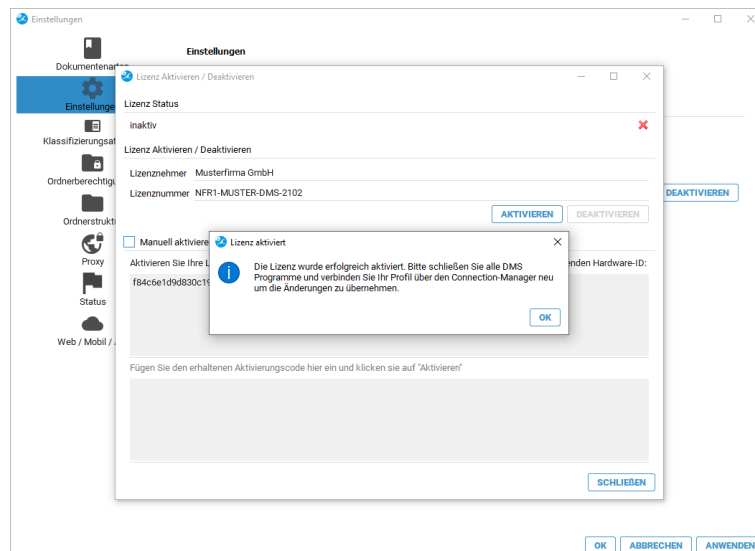
Figure 2.3: Settings - Settings - License Activation Successful

2.2 Update License (Enhancement, Extension, Add-ons)

Over the course of time, license information may change. If, for example, a license is enhanced, the update period extended, or add-ons added to the license, you need to update the license information. ecoDMS usually executes these changes automatically in a background process, when an administrator logs on. If, however, you want to manually update the license information, complete the following steps:

1. Open the Settings dialog and select the "Settings - License" tab.

2. Click "Update License"

    a) The license will be updated now.

3. To activate the new license information, users must close the ecoDMS client, disconnect and then re-establish the connectio via the Connection Manager.
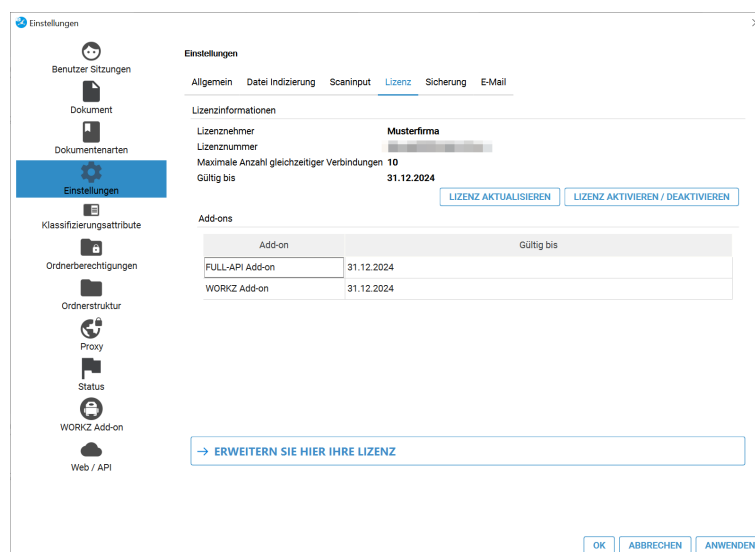
Figure 2.4: Settings - Settings - License (Here: Full Version with Full API and WORKZ Add-on)

2.3 Activate Licenses (ecoDMS without Internet Access)

- If you can't connect your ecoDMS client to the internet from your workstation, you can manually activate your ecoDMS license.
    - To do so, request an activation code from the ecoDMS website.
    - You can do this from any computer with internet access.
    - Then you can activate the license in the Settings dialog without an internet connection.
- If you are using a virtual machine, please ensure that you are using a hardware virtual machine (HVM). PV (paravirtualization) is not supported. Otherwise you cannot activate your license.

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

2. Click "Activate License".

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

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

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

4. Enable the field "Activate manually".

5. Note the displayed Hardware ID.

    a) for example: Copy it to Clipboard.

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

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

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

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

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

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

8. Click "Activate License".

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

    a) Note the displayed code.

        i. for example: Copy it to Clipboard.

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

11. Click "Activate".

    a) The license will be activated now.

12. To activate the new license information, users must close the ecoDMS client, disconnect and then re-establish the connection via the Connection Manager.

2.4 Deactivate License

To deactivate the license, complete the following steps in the ecoDMS client:

1. Open the Settings dialog and select the "Settings - License" tab.

2. Click "Deactivate".

   a) The license is deactivated now.

2.5 License Details and Validity

- From the purchasing date onwards, updates for the selected period are free.
- A license is valid permanently and can be used without time limit. However, support will end following the expiry of the update period.
- Once the current update period has expired, you can extend it.
- For more information about the licensing model, visit www.ecodms.de.

To view your license details, complete the following steps:

1. Open the Settings dialog and select the "Settings - License" tab.

2. The following license information displays:
   - Licensee
   - License number
   - Maximum concurrent connections
   - "Valid until" specifies the end of the update period.
   - The add-on area displays the expiry date of any enhancements you purchased.
     - Following the expiry date, the add-ons are automatically deactivated.
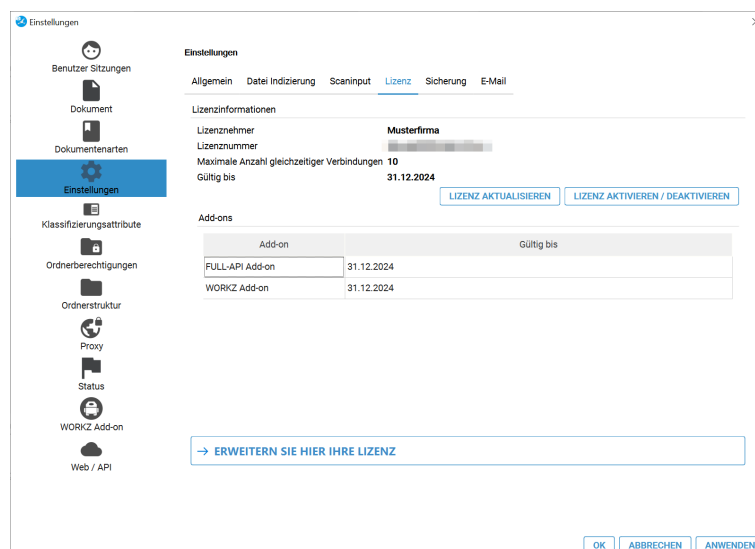
Figure 2.5: Settings - Settings - License (Here: Full Version with Full API and WORKZ Add-on)

2.6 Status of Software and License

ecoDMS displays the status of the installed ecoDMS version and information about license validity in the bottom right of the footer. For this, ecoDMS uses a traffic light system:

- Green icon:
    - Latest version installed
- Orange icon
    - New version available
- Red icon
    - Update period has expired
- Grey icon:
    - Information cannot be retrieved (probably no connection to the Internet)

If there is information on the license validity, the following text displays next to the status icon:

- **Update period within the activated license is still valid**
    - This message is displayed 3 months before or until the license expires

    - Update entitlement expires in X days
        * Your update entitlement expires in X days. Updates and guaranteed support will no longer be available following this period.

- **Update period within the activated license is no longer valid**
    - This message is displayed for 3 months after the update period has expired

    - Update entitlement expired
        * Your update entitlement has expired. Updates and guaranteed support are no longer available. Visit our website www.ecodms.de to secure your lifetime license fee guarantee.

- **License fee guarantee expired**
    - This message is displayed after the grace period of 3 months for extending the update period and obtaining the license fee guarantee has expired

    - License fee guarantee expired
        * Your update entitlement has expired. Updates and guaranteed support are no longer available.

3 Display

- We recommend a screen resolution of at least 1280 x 1024 px.
- Please note that these settings refer to the individual workstation and are not stored in the user profile.
- ecoDMS has two display types for the document overview: You can choose between the modern view of all documents in card form or the conventional table list.
- Viewing a preview (table view + map view) requires a license of the ecoDMS full version, but can be tested within the demo version. This feature is not enabled in the Free4Three version.

You can customize the ecoDMS user interface and the document order for each workstation.

3.1 Cards View: Modern

The modern view displays all necessary document information in individual cards. The cards contain

- a thumbnail of the PDF document (preview)
- the main classification information
- a history of all activities
- a compact selection of available functions associated with the document
- viewing, editing, and creating notes
- version control

3.1.1 Enable Cards View

If you are in the conventional view, click the "Cards View" icon on the lower right of the document table to switch to the modern cards view.

Figure 3.1: Icon - Cards View

3.1.2 Zoom Levels

There are a total of 4 zoom levels in the modern Card View. Use the following options to change the display of the document tiles:

1. Use the slider in the lower, left-hand area of the document overview (level 1 to 4 from left to right)

Figure 3.2: Slider Control for Sizing the Cards View

2. and via keyboard
    a) CTRL +
        i. increases the zoom level
    b) CTRL -
        i. reduces the zoom level

3.1.2.1 First Zoom Level

1. The individual document tiles contain
    a) the DocID
    b) classification information (without icons)
    c) and a Share icon to open more features

2. Click the Share icon in a tile to open more features for the selected document. For more information about individual features, refer to the corresponding chapter in this manual.
    a) Display: Open Document
    b) Download: Download Document
    c) Email: Send Document by Email
    d) Share Link: Share Documents via Internet
    e) Internal Link: Copy Internal Link to Clipboard
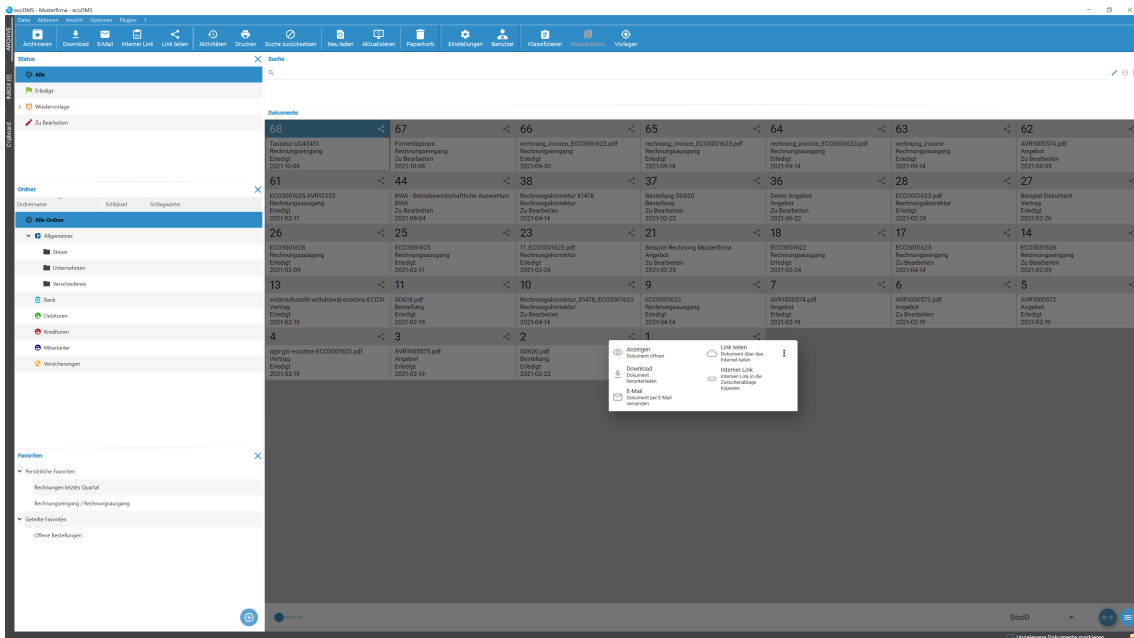
Figure 3.3: ecoDMS: First zoom level in the modern Card View

3.1.2.2 Second Zoom Level

1. The individual document tiles contain
   a) the DocID
   b) classification information (with icons)
   c) a small document preview
   d) and tabs with more features

2. Click one of the tabs to open more features for the selected document. For more information about individual features, refer to the corresponding chapter in this manual.
   a) Display: Open Document
   b) Download: Download Document
   c) Email: Send Document by Email
   d) Share Link: Share Documents via Internet
   e) Internal Link: Copy Internal Link to Clipboard
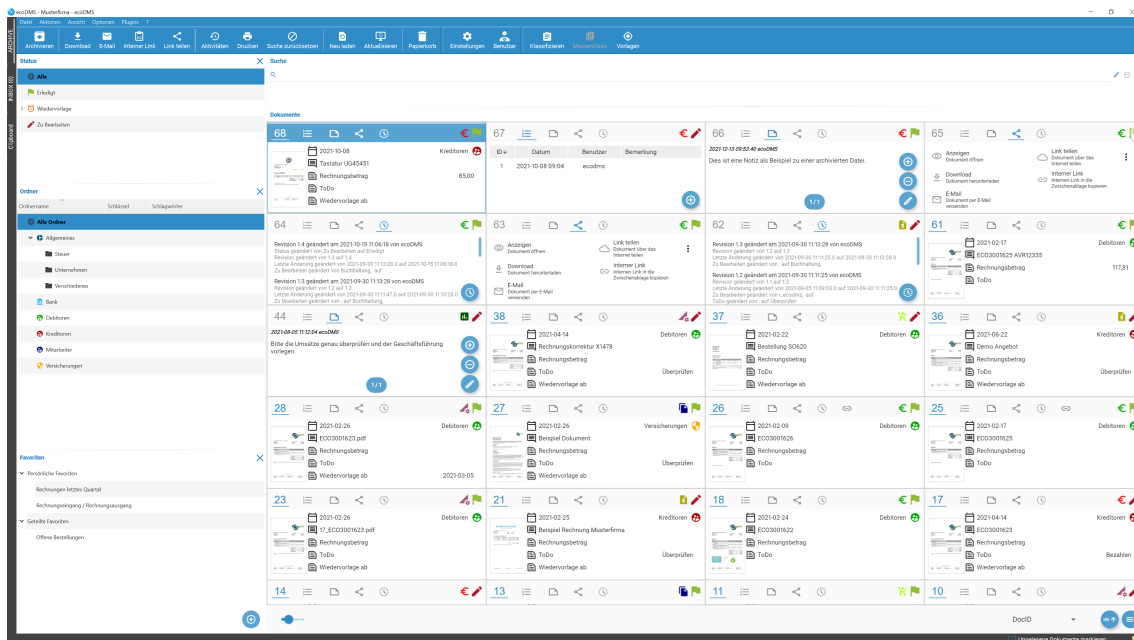
Figure 3.4: ecoDMS: Second zoom level in the modern Card View

3.1.2.3 Third Zoom Level

1. The individual document tiles contain
   a) the DocID
   b) classification information (with icons)
   c) a medium-sized document preview with full-screen feature
   d) icon for file format
   e) icon for information about existing notes
   f) and tabs for further features

2. Click one of the tabs to open more features for the selected document. For more information about individual features, refer to the corresponding chapter in this manual.
   a) Display: Open Document
   b) Download: Download Document
   c) Email: Send Document by Email

d) Share Link: Share Documents via Internet

e) Internal Link: Copy Internal Link to Clipboard
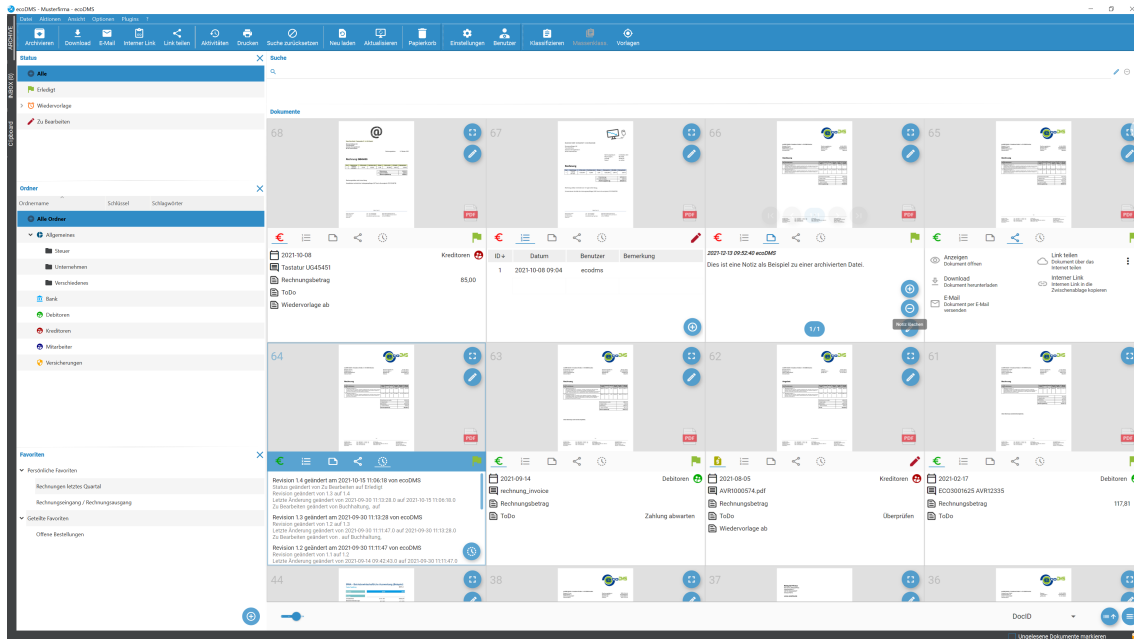
Figure 3.5: ecoDMS: Third zoom level in the modern Card View

3.1.2.4 Fourth Zoom Level

1. The individual document tiles contain

   a) the DocID

   b) classification information (with icons)

   c) a large document preview with full-screen feature

   d) icon for file format

   e) icon for information about existing notes

   f) and tabs for further features

2. Click one of the tabs to open more features for the selected document. For more information about individual features, refer to the corresponding chapter in this manual.

   a) Display: Open Document

   b) Download: Download Document

   c) Email: Send Document by Email

   d) Share Link: Share Documents via Internet

   e) Internal Link: Copy Internal Link to Clipboard
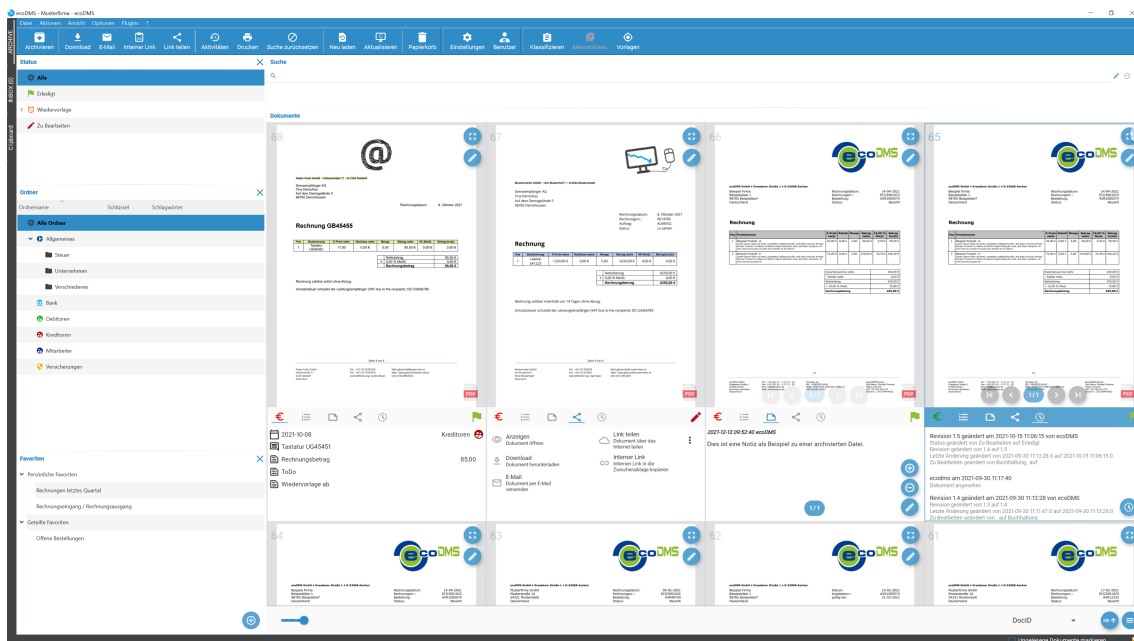
Figure 3.6: ecoDMS: Fourth Zoom Level in Modern Card View

3.1.3 Sort Card View

– The Sort button is below the card view.

– The available sorting options are ascending and descending order.

– You can sort by all available classification attributes of ecoDMS.

Sort the documents in the table in any order on your computer. For example, you can sort documents by DocID (default) or document type.

1. Below the card view, use the picklist to select the attribute by which you want to sort the documents

2. Use the Sort button to sort in descending or ascending order
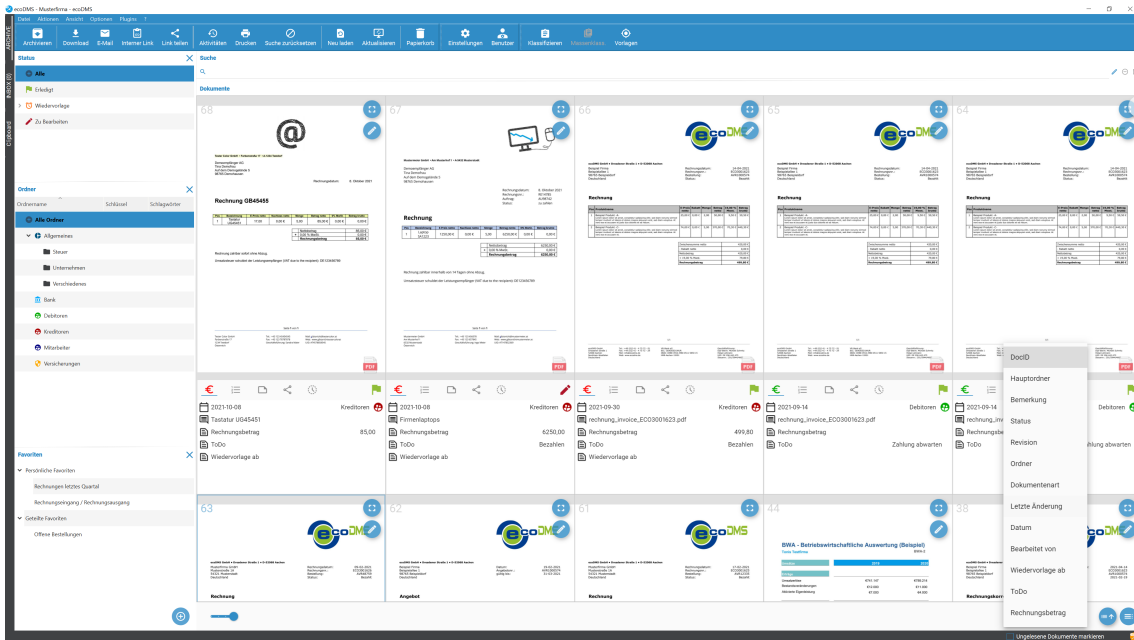
Figure 3.7: Sort Documents in Card View (Select Classification Attributes)

3.2 Table View: Conventional

The conventional view displays all documents in form of a table list. ecoDMS displays each document in a separate row with the relevant classification information. If you select a document row, a window with the following matching document information displays:

– a document preview (PDF)

– a history of all activities

– a compact selection of available functions associated with the document

– viewing, editing, and creating notes

– version control

3.2.1 Enable Table View

If you are in the modern cards view, click the "Table View" icon on the lower right of the document table to switch to the conventional table view.

Figure 3.8: Icon - Table View
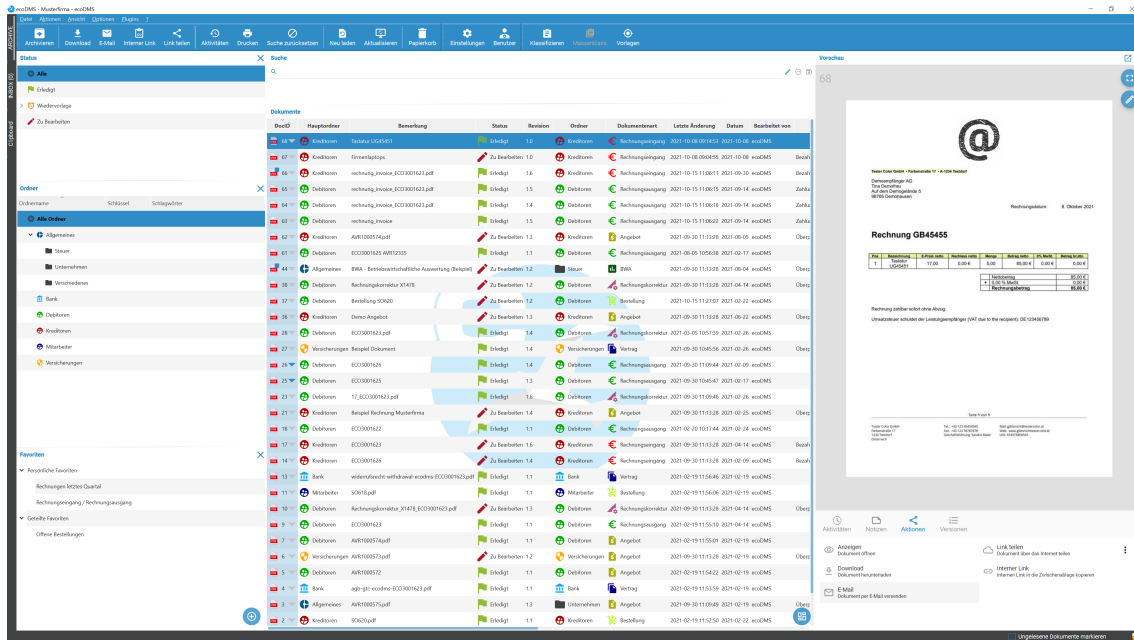
Figure 3.9: ecoDMS: Conventional Table View (blank)

3.2.2 Configure Table

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

3.2.2.1 Hide Columns

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

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

2. Select the "Show/Hide Columns" command

3. A list containing the available columns opens

   a) If the checkbox is disabled, the column is not displayed in the table.

3.2.2.2 Show Columns

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

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

2. Select the "Show/Hide Columns" command

3. A list containing the available columns opens

   a) If the checkbox is enabled, the column is displayed in the table.

3.2.2.3 Adjust Columns to Content

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

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

2. Select the "Adjust Columns to Content" command

3. The columns are adjusted to the current contents.

3.2.2.4 Adjust Columns to Content (Automatic)

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

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

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

3. The columns are automatically adjusted to the contents.

3.2.2.5 Show All Columns

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

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

2. Select the "Show All Columns" command

3.2.3 Sort Table

Sort the documents in the table in any order on your computer. You can sort by any attribute in the table. For example, you can display documents on your PC according to date of receipt or document type. The available sorting options are ascending and descending order.

1. Click the title of the column you want to sort by.

    a) ecoDMS sorts the displayed documents according to the selected column.

2. The arrow above the column title indicates whether the sorting order is ascending or descending.

    a) To switch between descending and ascending order, click the column again.

3.3 Highlight Unread Documents

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

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

2. If you enable the checkbox, unread documents are highlighted until they are opened for the first time ("Show" function).
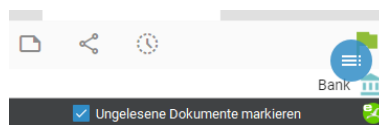
Figure 3.10: Highlight Unread Documents

3.4 Icons

The following chapter contains an overview of icons in ecoDMS.

3.4.1 File (ecoDMS)

	Archive
	Link document
	Set resubmission
	Activities
	Deadlines
	Reload Documents
	Print
	Move to Trash
	Exit

3.4.2 Actions (ecoDMS)

	Open
	Download
	Send document by email
	Copy internal link to clipboard
	Send internal link by email
	Share documents over the internet
	Shared documents

3.4.3 View (ecoDMS)

	Search folder
	Continue folder search
	Skip to folder
	Reload workbench
	Reset Desktop
	Save workbench settings
	Load workbench settings

3.4.4 Options (ecoDMS)

	Search folder
	User
	Configure toolbar
	Reset Search

3.4.5 Classification (ecoDMS)

📋	Classify
📋	Mass classification
◎	Templates

3.4.6 Data Export (ecoDMS Plugin)

⊞	Create New Export
⟳	Refresh export status
⬇	Execute export download
❐	Remove export from list

3.4.7 Versions (ecoDMS)

⬆	Open Version
PDF	Open PDF Version
💾	Export
💾	Export Version
PDF	Export PDF Version
✉	Send Document by Email
🔒	Lock Document
🔓	Share Document
⊕	Add New Version

3.5 Configure Toolbars

Users can configure their own icons in the ecoDMS toolbar. First, open the "Configure Toolbars" dialog. To do so, complete the following steps:

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

2. The "Configure Toolbars" dialog opens.
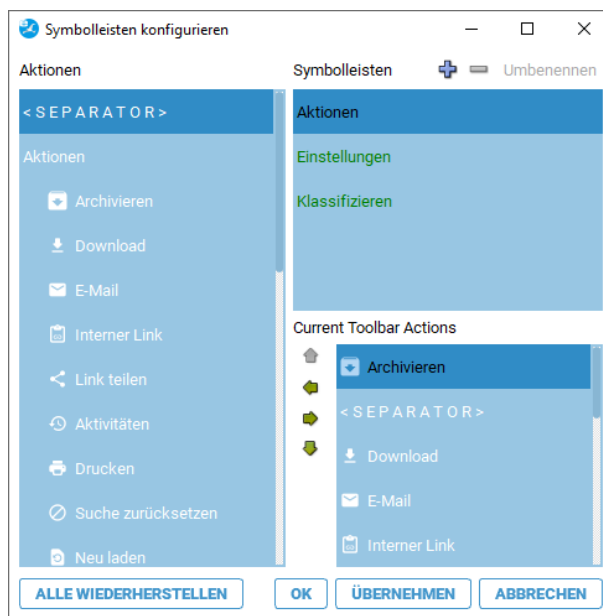
Figure 3.11: Configure Toolbars

3.5.1 Create New Toolbar

To create a new toolbar:

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

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

3. Overwrite this name with your description.

4. Then press "Enter".

3.5.2 Delete Toolbar

You can delete the toolbars you have created.

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

2. Now click the - icon.

3. You have deleted the toolbar.

3.5.3 Add Toolbar Actions / Icons

You can add more actions / icons to the toolbars:

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

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

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

3.5.4 Remove Toolbar Actions / Icons

You can delete actions / icons in custom toolbars:

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

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

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

3.5.5 Change the Order of Toolbar Icons/Actions

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

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

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

3.5.6 Restore All

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

3.6 Manage Desktop

There are several functions to help you manage your desktop.

3.6.1 Save Desktop Settings

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

1. Click "View - Save Desktop Settings"

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

3. Confirm your selection with "OK".

3.6.2 Load Desktop Settings

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

1. Click "View - Load Desktop Settings".

2. Select the saved file on your file system.

3. Confirm your selection with "OK".

3.6.3 Reset Desktop

You can reset the desktop to the default view (view after installation) if necessary:

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

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

3.6.4 Reload Desktop

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

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

1. Click the "Update" icon in the toolbar **or**

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

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

3.6.5 Minimise / Maximise / Restore Client

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

3.7 Windows / Area Visibility

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

– Status

– Favorites

– Folder

– Preview

3.7.1 Hide Windows

1. Right-click the toolbar or menu bar

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

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

3.7.2 Show Windows

1. Right-click the toolbar or menu bar

2. Tick all entries you want to show
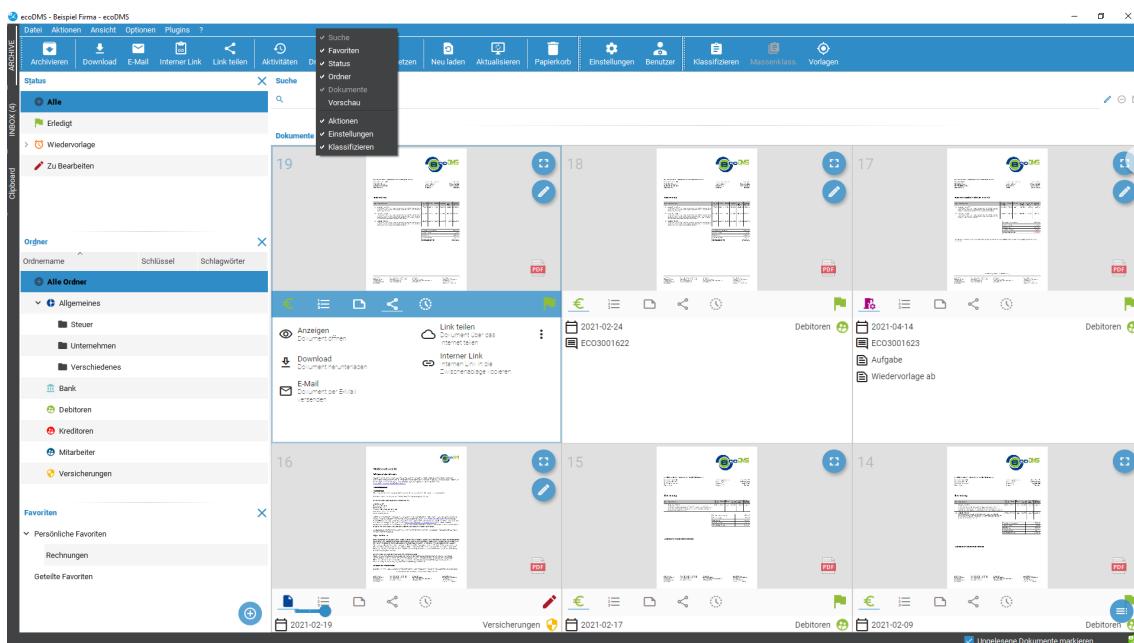
Figure 3.12: Visibility of Windows in ecoDMS (Here: Card View)

3.8 Show/Hide Notifications

– ecoDMS displays a notification when saving and executing certain functions (e.g. when saving the user administration).

– You can disable these notifications by enabling the checkbox "Do not show this dialog again".

– If you want to restore all warnings, click "View -> Reset Desktop" in the main menu.

4 Login, Connection Manager

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

1. In order to work with ecoDMS on a client, you must log in via the Connection Manager. The Connection Manager is automatically installed together with ecoDMS Client.
    a) To use the Web Client, you do not need to be connected through the Connection Manager.
2. The first installation of ecoDMS Server already creates a user. For more information on login credentials for this ecoDMS user, refer to the chapter "Login Credentials".

4.1 Open Connection Manager

There are different options to open the Connection Manager.

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

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

3. **Operating System Toolbar**
    a) Right-click the Connection Manager icon on the toolbar and then click "Profiles". The Connection Manager interface opens.
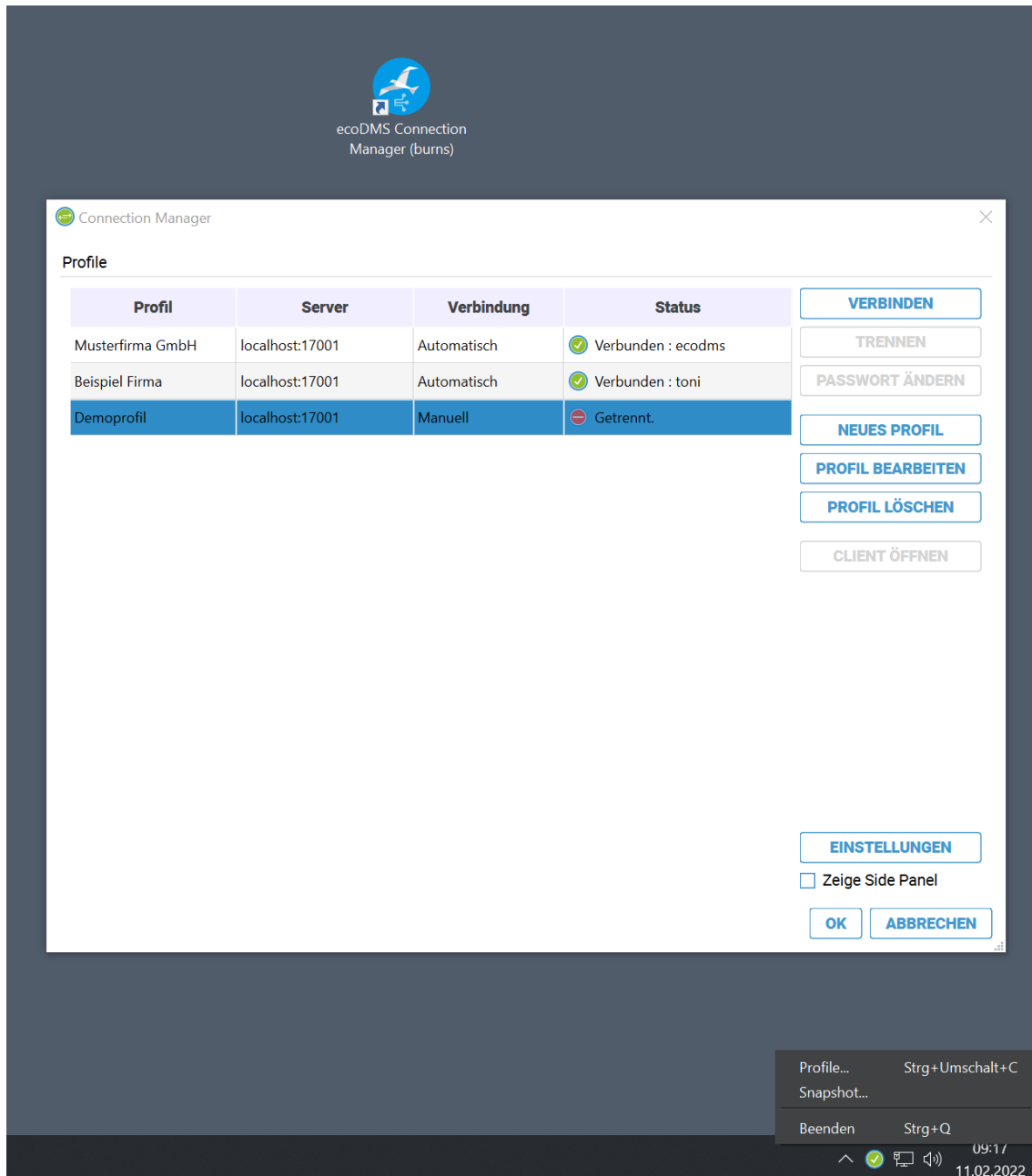
Figure 4.1: Connection Manager

4.2 Exit Connection Manager

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

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

- Now click "Exit".

> **Attention:** The connection with ecoDMS Server is only terminated if ecoDMS Client is closed and the connections have been disconnected in the Connection Manager at the respective workstation. Simply disconnecting the Connection Manager or closing the client will not unblock a license. To do this, close or disconnect all ecoDMS components and the Connection Manager at the workstation.
>
> **Note:** You can find the Connection Manager on your toolbar. In Windows the icon usually displays next to the time. Depending on the number of other applications running on your PC, Windows hides some icons. Use the arrow to display the hidden icons. The same applies to Ubuntu and macOS.
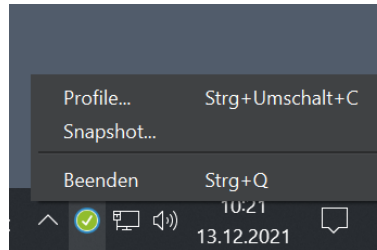
Figure 4.2: Connection Manager - Exit

4.3 Profile Icons - Description

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

Figure 4.3: Connection Manager - No Connection

Figure 4.4: Connection Manager - Establishing Connection

Figure 4.5: Connection Manager - Connection Established

4.4 Client-Server Communication

ecoDMS Server and its clients communicate via TLS encryption.

4.5 Access from Outside

In order to access ecoDMS from outside,

- you must activate ecoDMS Server port accordingly.

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

- Alternatively, you can allow access via VPN connection

- or use the ecoDMS Web client with enabled remote access (Settings - Web Service) (Refer to the ecoDMS Web Client manual for more details).

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

4.6 Create Profiles and Login

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

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

1. Open the ecoDMS Connection Manager.

2. Click the "New Profile" button.

3. Enter the appropriate information in the dialog:

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

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

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

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

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

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

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

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

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

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

Figure 4.6: Connection Manager - Create and Edit Profile

4.7 Edit Profiles

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

1. Open the ecoDMS Connection Manager.

2. Select the profile in the table.

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

4. Click the "Edit Profile" button.

5. Enter the appropriate information according to "Create Profiles and Login" in the dialog.
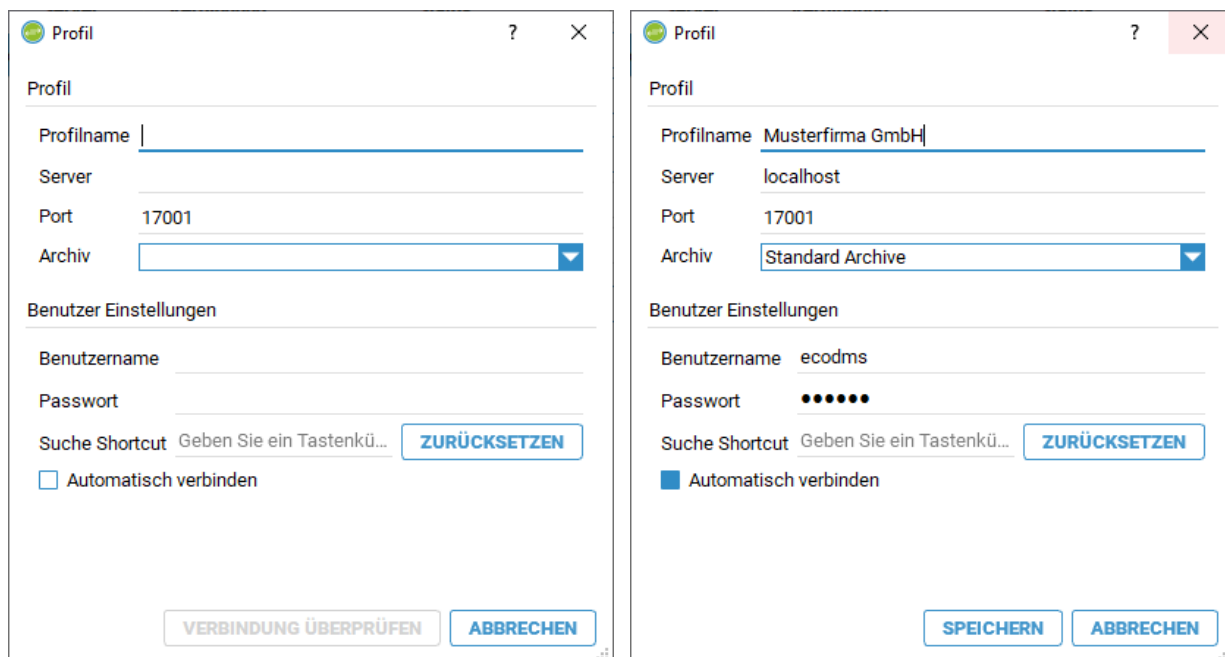
Figure 4.7: Connection Manager - Create and Edit Profile

4.8 Connect Profile

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

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

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

   a) Select the profile in the Connection Manager.

   b) Then click the button "Connect".

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

4.9 Disconnect Profile

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

To end the connection to ecoDMS Server:

1. Open the ecoDMS Connection Manager.

2. Select the profile in the table.

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

4.10 Delete Profile

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

1. Open the ecoDMS Connection Manager.

2. Select the profile in the table.

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

4. Click the "Delete Profile" button.

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

4.11 Change Password

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

4.12 Open ecoDMS

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

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

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

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

Then the programme starts. The ecoDMS start screen displays.

Figure 4.8: ecoDMS Desktop Icon

4.13 Exit ecoDMS

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

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

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

3. Use this keyboard shortcut: CTRL+ Q

5 Users, Groups, Passwords

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

Roles / Group System

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

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

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

Save Settings
Changes in user and role management only take effect after the respective users restart the client. If you want to hide this message box in future, enable the checkbox "Do not show this message again".
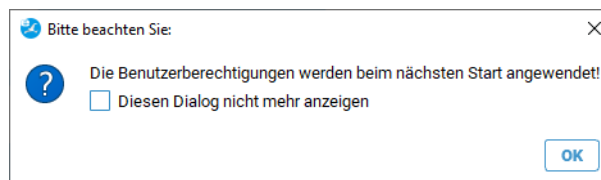
Figure 5.1: Meldung - Die Benutzerberechtigungen werden beim nächsten Start angewendet

5.1 Permissions

In the following the system privileges are explained. You can also read here how you can assign user permissions.
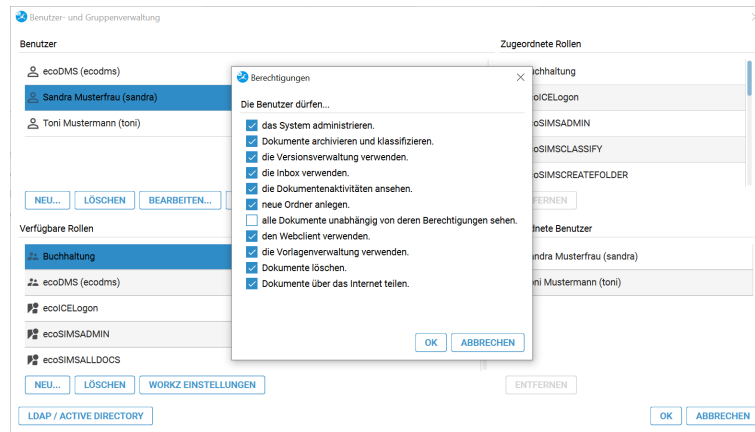
Figure 5.2: User and Group Management: System Permissions
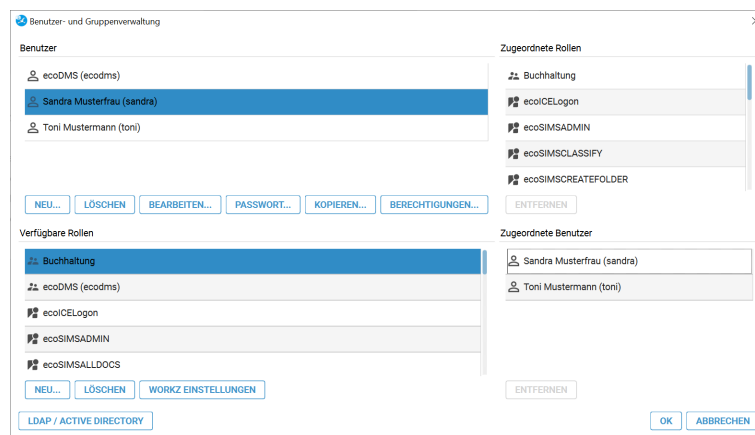
Figure 5.3: User and Group Management

5.1.1 System Permissions

The user is allowed to...

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

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

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

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

3. **use version control. =ecoSIMSVERSIONING**

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

4. **use the inbox.= ecoICELogon**

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

5. **view document activities. = ecoSIMSHISTORY**

   The role „ecoSIMSHISTORY" allows you to view the activities related to the displayed documents.

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

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

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

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

8. **use the web client. = ecoSIMSWEBCLIENT**

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

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

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

10. **erase documents. = ecoSIMSDELETE**

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

11. **share Documents via Internet.. = ecoSIMSINETSHARE**

    The "ecoSIMSINETSHARE" role allows the user to share documents with third parties via the internet and make them available for external download.

12. **ecoSIMSUSER**

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

13. **scanner**

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

5.1.2 Assign Permissions via dialog

You can assign system permission via the dialog or via Drag & Drop. In this section you can read how to use the "dialog" function for this process:

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

2. Click the "Permissions" button.

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

4. Save your settings with "OK" or cancel the operation with "Cancel".

5.1.3 Delete Permissions via dialog

The assigned system permissions can be deleted from a user via a dialog or directly in the user and group management. In this section you can read how to use the "dialog" function for this process:

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

2. Click the button "Permissions".

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

4. Save your settings with "OK" or cancel the operation with "Cancel".

5.1.4 Assign Permissions via Drag & Drop

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

1. Method

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

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

2. Method

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

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

5.1.5 Delete Permissions Directly

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

1. Method

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

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

3. Click the "Remove" button.

2. Method

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

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

3. Click the "Remove" button.

5.2 User Management

ecoDMS provides several options for creating and managing users.
1. You can create and manage roles (users) directly from the User and Group Management.
   and/or
2. If you use LDAP or Active Directory services, you can connect them with ecoDMS.
This section explains how to create and manage the roles (users) **directly from ecoDMS.**

To open User and Group Management, click:

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

2. Toolbar -> "Users" icon

Figure 5.4: Icon: User and Group Management
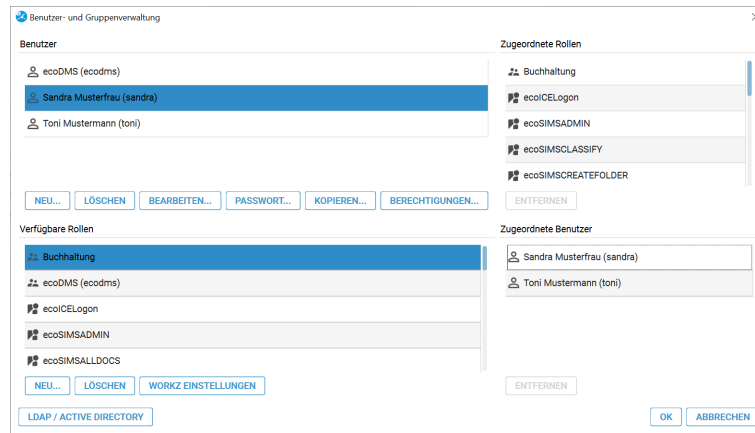
Figure 5.5: User and Group Management

5.2.1 Create New User

– Every user you create is automatically saved as "role" with name and username.

To add a new user, complete the following steps:

1. In the "User" window, click the "New" button.

2. A dialogue box opens. Enter the following user data:

   a) **Name (mandatory field):** Enter the name of the user. As a rule, you enter first name and surname.
   Example:

   ```
   Sandra Musterfrau
   ```

   b) **Acronym:** Here you can enter a short form of the name. This is optional.
   Example:

   ```
   mm
   ```

   c) **Sign-in name (mandatory field):** Enter the actual user name which the user must enter to log on to the system.
   Example:

   ```
   sandra
   ```

   d) **E-Mail:** To receive email notifications, users must enter their email address in ecoDMS (also refer to 36.5 and 6.4.6). Entering an email address is optional.
   Example:

   ```
   s.musterfrau@ecodms.de
   ```

e) **Password (mandatory field):** Enter the password for the user. Upon the first login, the user is asked to enter the password and replace it with a new password.

f) **Confirm password (mandatory field):** You must confirm the password for security reasons.

3. Confirm your entry with "OK" or abort the process with "Cancel".
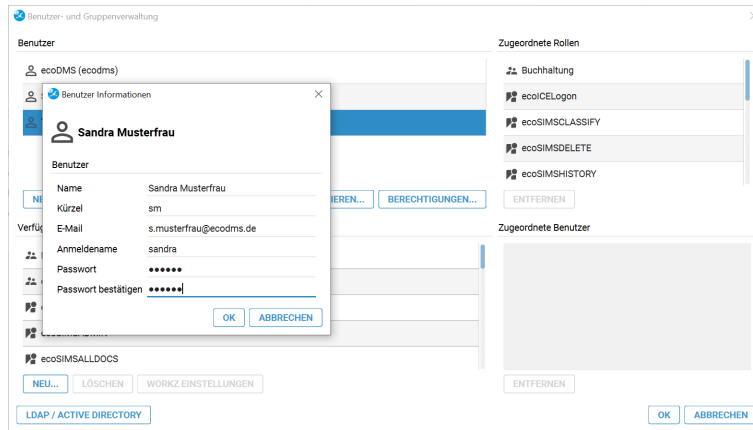
Figure 5.6: User and Group Management: Create New User

5.2.2 Edit User

You can edit the user data. To do so, complete the following steps:

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

2. Click the "Edit" button.

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

a) **Name (mandatory field):** Enter the name of the user. As a rule, you enter first name and surname.
   Example:

   ```
   Max Mustermann
   ```

b) **Acronym:** Here you can enter a short form of the name. This is optional.
   Example:

   ```
   mm
   ```

c) **E-Mail:** To receive email notifications, users must enter their email address in ecoDMS (also refer to 36.5 and 6.4.6). Entering an email address is optional.
   Example:

   ```
   s.musterfrau@ecodms.de
   ```

d) **Sign-in name:** You cannot change the sign-in name.

4. Confirm your entry with "OK" or abort the process with "Cancel".
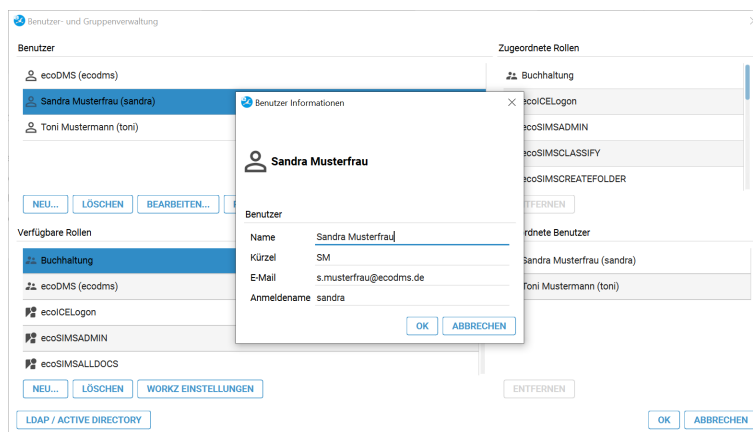
Figure 5.7: User and Group Management: Edit User

5.2.3 Copy User

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

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

2. Click the button "Edit".

3. A dialog opens. Enter the user information.

   a) **Name (mandatory field):** Enter the name of the user. As a rule, you enter first name and surname.
   Example:

   ```
   Sandra Musterfrau
   ```

   b) **Acronym:** Here you can enter a short form of the name. This is optional.
   Example:

   ```
   mm
   ```

   c) **Sign-in name (mandatory field):** Enter the actual user name which the user must enter to log on to the system. Example:

   ```
   sandra
   ```

   d) **E-Mail:** To receive email notifications, users must enter their email address in ecoDMS (also refer to 36.5 and 6.4.6). Entering an email address is optional.
   Example:

   ```
   s.musterfrau@ecodms.de
   ```

   e) **Password (mandatory field):** Enter the password for the user. Upon the first login, the user is asked to enter the password and replace it with a new password.

   f) **Confirm password (mandatory field):** You must confirm the password for security reasons.

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

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

5.2.4 Erase User

Please note:
- The information relevant for document archiving remains in the system after a user has been erased. For example, the document activities (history) will continue to provide information about who edited the document on which date.
- If the erased user last edited the document, the user name remains in the "Edited" classification field.
- The user information is an important part of the audit-proof and correct transparency of document processes. If you also want to erase this information from ecoDMS, you must completely erase the respective document. In this case the user information within the classification and the history is anonymised, provided the administrator actually erased the user.

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

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

2. Then click "Erase".

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

4. Confirm your selection with "OK".

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

6. The user is now irrevocably erased from the system. You cannot undo this operation.
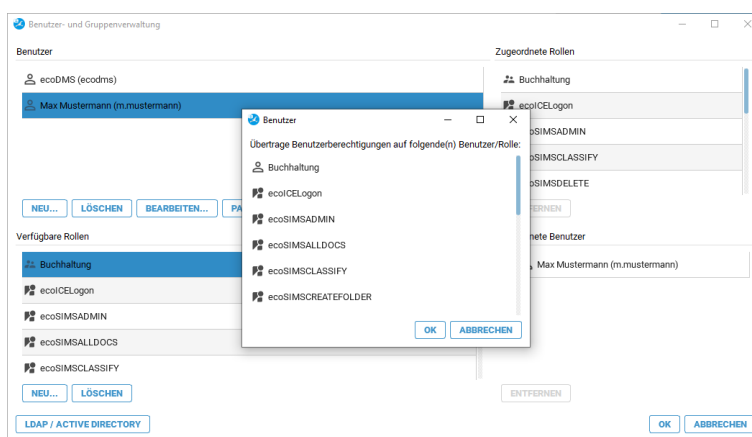
Figure 5.8: User and Group Management: Erase Users and Transfer Permissions
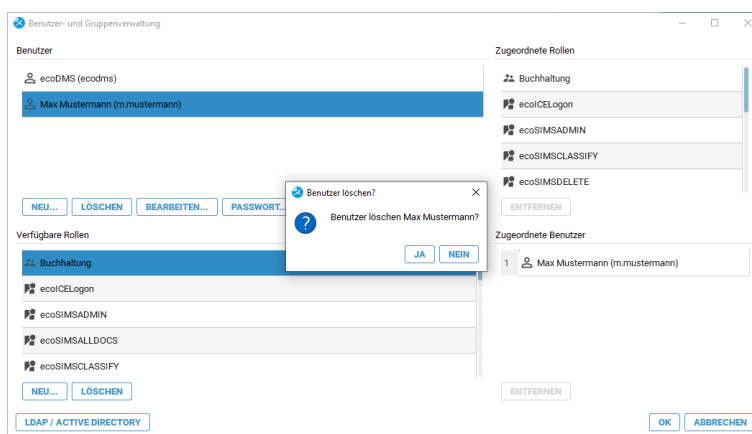
Figure 5.9: User and Group Management: Confirmation Prompt for "Erase User" Function

5.3 LDAP / Active Directory Management

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

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

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

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

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

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

5.3.1 LDAP/ Active Directory Open dialog

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

2. Click "LDAP / Active Directory".

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

Figure 5.10: Symbol: User and Group Management
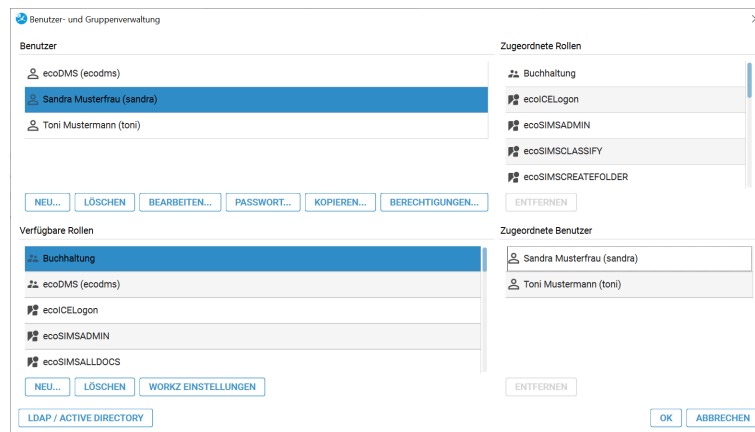
Figure 5.11: User and Group Management
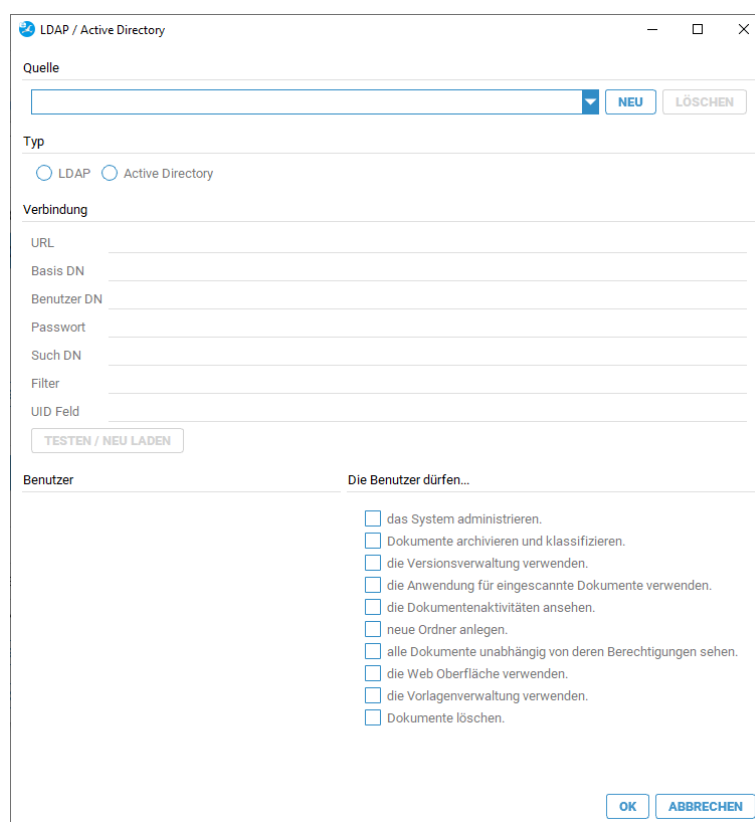
Figure 5.12: User and Group Management: LDAP / Active Directory

5.3.2 Create / Edit LDAP Profile

To create a new LDAP profile, complete the following steps:

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

2. Click "New".

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

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

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

   ```
   ldap://server01
   ```

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

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

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

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

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

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

   h) **Email Field:** Here you can call user email addresses. To receive email notifications, users must enter their email address in ecoDMS (also refer to 36.5 and 6.4.6). Entering the email addresses is optional. The email address you configured there is used for LDAP/AD users. If an email address is saved for an LDAP/AD user, ecoDMS displays the email address in the user list behind the username, such as Max Mustermann (m.mustermann@ecodms.de).

Example values LDAP

```
URL: ldap://192.168.1.1:389
Basis DN: dc=sampledomain,dc=local Benutzer DN: uid=admin,cn=users,dc=sampledomain,dc=local
Password: ***
Such DN: cn=Users Filter: (&(objectClass=person)(memberof=CN=Sample-Admins,CN=Users,CN=
    groups,DC=sampledomain,DC=local))
UID Field: uid E-Mail
Field: mailprimaryaddress
```

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

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

7. Confirm the settings with "OK" or cancel the operation with "Cancel".

Figure 5.13: User and Group Management: Create new LDAP profile (example)

5.3.3 Create /Edit Active Directory Profile

To create a new LDAP profile, complete the following steps:

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

2. Click "New".

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

4. Now enter the existing connection data of "Active Directory" in the "Connection" area.
   a) **URL:** Enter the host name or the IP address of the LDAP server used for user authentication. Example:
   ```
   ldap://server01
   ```
   b) **Base DN:** Enter the Base DN of your LDAP server here. The Base DN specifies from which place in a directory structure to start the search for specific objects.
   c) **User DN:** Enter the user name which ecoDMS uses for authentication with the LDAP server.
   d) **Password:** Enter the matching password here.
   e) **Search DN:** Enter the top Level DN of the subtree in the LDAP directory hierarchy where the users / groups are stored.
   f) **Filters:** Use the "Filters" parameter to filter (limit) the result of the users / groups returned by the LDAP.
   g) **UID Field:** In this field you can define the method with which you create the LDAP request to determine the user data.

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

```
userPrincipalName
```

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

h) **Email Field:** Here you can call user email addresses. To receive email notifications, users must enter their email address in ecoDMS (also refer to 36.5 and 6.4.6). Entering the email addresses is optional. The email address you configured there is used for LDAP/AD users. If an email address is saved for an LDAP/AD user, ecoDMS displays the email address in the user list behind the username, such as Max Mustermann (m.mustermann@ecodms.de).

Example values Active Directory

```
URL: ldap://192.168.1.1
Basis DN: dc=sampledomain,dc=local
User DN: Administrator@sampledomain.local
Password: ***
Such DN: cn=Users
Filter: (&(objectcategory=user)(memberof=CN=Sample-Admins,CN=Users,DC=sampledomain,DC=
    local))
UID Feld: sAMAccountName
Email Field: mail
```

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

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

7. Confirm the settings with "OK" or cancel the operation with "Cancel".

Figure 5.14: User and Group Management: Create new Active Directory profile (example)

5.4 Custom Groups (Roles)

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

5.4.1 Create Custom Group

To create your custom user group:

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

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

3. Save the role with "OK" or cancel the operation with "Cancel".
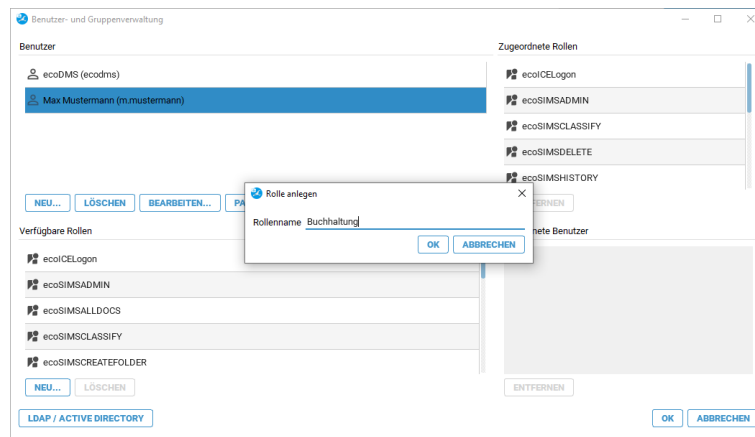
Figure 5.15: User and Group Management: Create New Role (Group) (Here: Accounting)

5.4.2 Assign Users to Group

There are several options to assign users to custom role(s):

1. Method

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

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

2. Method

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

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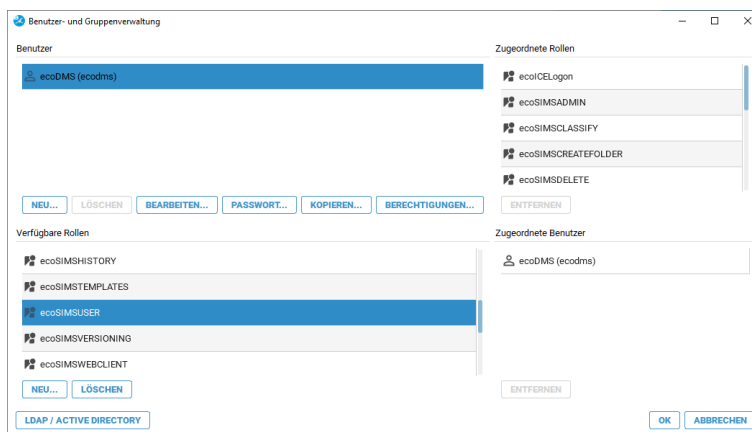
Figure 5.16: User and Group Management

5.4.3 Delete Users from Group

There are several options to assign users to custom role(s):

1. Method

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

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

3. Click the "Remove" button.

2. Method

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

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

3. Click the "Remove" button.
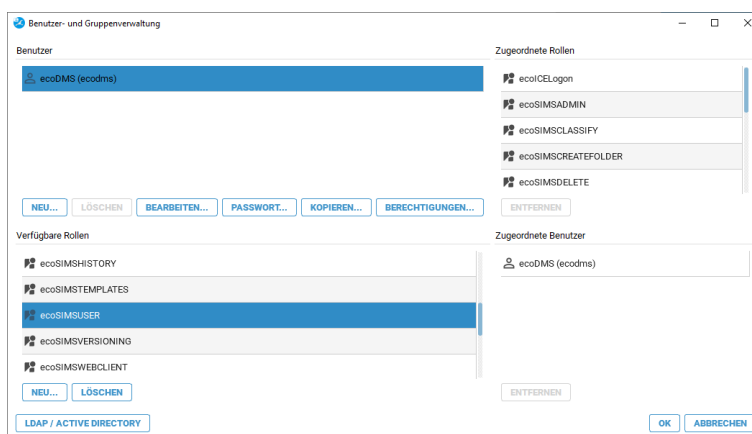
Figure 5.17: User and Group Management

5.4.4 Delete Custom Groups

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

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

2. Click the "Delete" button.

5.4.5 Example: Custom Groups

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

5.5 Change Passwords

The user passwords can be changed anytime by the administrator and the user.

5.5.1 Change Password As Administrator

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

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

2. Click the "Password" button

3. A dialog opens. Enter the following information:

   a) **New password:** Enter the new password for the user

   b) **Confirm password:** You must confirm the password for security reasons

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

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

6. Confirm the message with "OK"
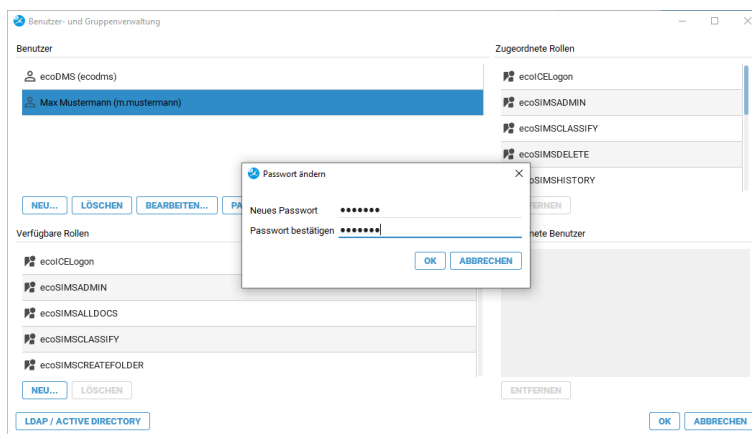
Figure 5.18: User and Group Management: Change User Password as Administator

5.5.2 Change Your User Password

Use the Connection Manager to change your password.

1. Open the ecoDMS Connection Manager

2. Connect with your user name and valid password

3. Click the button "Change Password"

4. A dialog opens. Enter the new password information

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

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

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

6. The new password is now valid
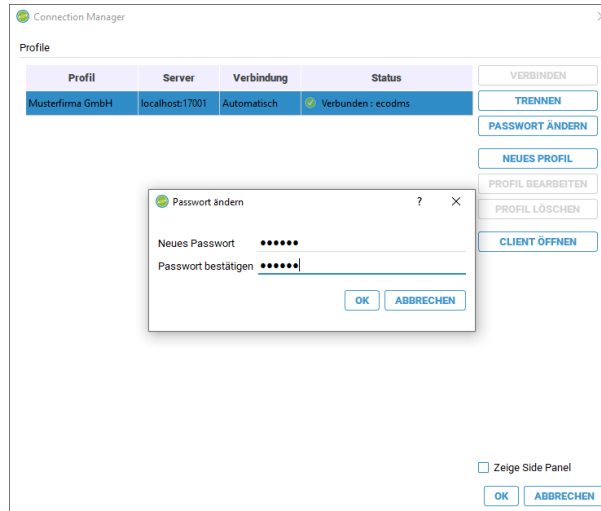
Figure 5.19: Connection Manager: Change Own User Password

5.5.3 System Administrator: Change Password

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

1. Open the ecoDMS Connection Manager

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

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

3. Click the "Change Password" button

4. Enter the following password information:

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

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

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

6. The new password is now valid

5.5.4 User is locked: Reset Password

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

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

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

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

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

6 Settings

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

You can customise ecoDMS. For example, specify your own document types + retention periods, folder structures + access permissions, classification attributes, status, etc., monitor user sessions and make the system settings you need. The Settings dialog provides these and more options for configuring the document management system. There are several options to open the settings dialog:

1. Menu -> Options -> Settings

2. Toolbar -> Settings Icon

3. Shortcut: CTRL + Alt + S

Figure 6.1: Symbol: Settings

6.1 User Sessions

> – By default, ecoDMS automatically times out after 10 minutes when users are inactive.
>
> – The system then automatically deallocates the user session and removes it from the active user sessions in the Settings dialog.
>
> – Optionally, administrators can manually disconnect active user sessions in the Settings.

The Settings display which users are actively connected to the document management system. ecoDMS displays the user name, the application used (e.g. desktop client or web client) and the time of the last activity. As an option, an administrator can disconnect sessions that are no longer needed. This frees simultaneous connections to allow other users to log in.
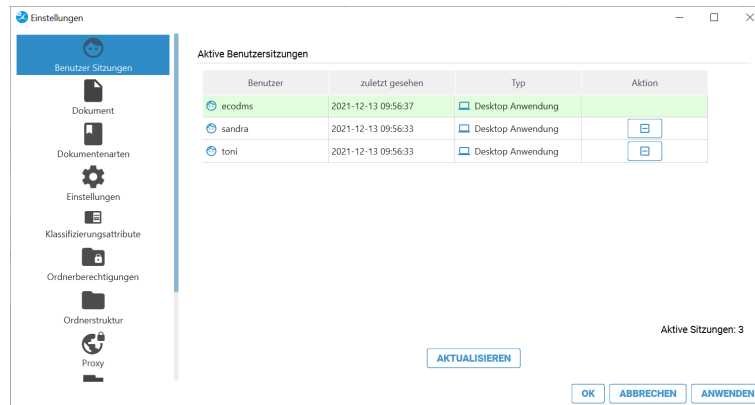
Figure 6.2: Settings: User Sessions

6.1.1 Disconnect Session

To disconnect a session, complete the following steps:

1. Select a user
   a) (you cannot disconnect your own user)

2. Click the icon in the "Actions" column.

3. Confirm your entry with "Yes" or abort the process with "No"

4. This frees simultaneous connections to allow other users to log in

6.1.2 Refresh Overview

– Refresh the display of active user sessions by clicking the "Refresh" button.

– The system checks for active connections to ecoDMS and displays the result in the overview.

6.2 Document

Use the available classification attributes, date and version information to globally define document file names. For the taxonomy of a file name, you can use classification information and custom text fields. The file name may, for example, contain the archiving date, document type, folder name, DocID and a text you define. An example output for this would be "18062021-incoming-invoice-supplier-1452-sample-text.pdf". You can configure these settings for conventional and versioned documents. ecoDMS uses the settings you define here to generate the file name for exporting, downloading, or sending a document or a document version via e-mail.

6.2.1 Settings

You can assign general settings for document file names. These settings are used for the global and version file name.

1. Fill in the fields as necessary:
   – **Empty Attribute Placeholder:**
     – If attributes you want to use for the file name are not populated during the classification of a document, the entry you make here is used as a placeholder at the respective position in the file name.
   – **Date Pattern:**
     – If you use a date to generate a file name, ecoDMS uses the pattern you define here for the date.
     – Default setting as an example (Year, Month, Day: 2021-06-18)

```
yyyy-MM-dd
```

- **Timestamp Pattern:**
    - If you want to assign an exact time stamp to the file name, ecoDMS uses the pattern you define here for the date and time.
    - Default setting as an example (Year, Month, Day, Hour, Minute, Second: 2021-06-18-11-58-26)

    ```
    yyyy-MM-dd-hh-mm-ss
    ```

- **Replace space with:**
    - If there are spaces in the file name, you can replace them with a character.
    - To do so, enable "Replace Spaces with".
    - Enter the value you want to replace the space with, e.g.

    ```
    -
    ```

2. Click "Apply" to save the settings or click "Cancel" to abort the process.
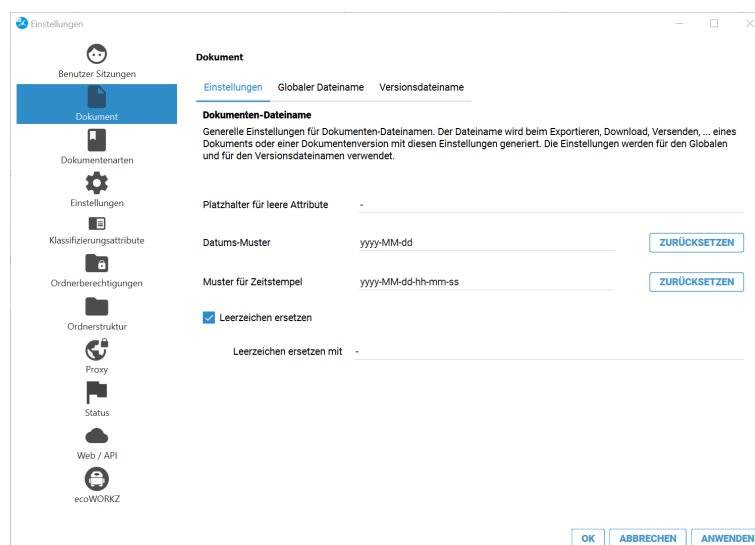
Figure 6.3: Settings: Document File Name (General Settings)

6.2.2 Global File Name

Use this tab to make settings for the global file name. The "File Name" section lists the attributes and text you want to use for the file name.

- Click "x" next to the value to remove it.

- The maximum length for the file name is 100 characters.
- Trailing spaces are truncated.
- The following characters are allowed for the name (others are removed)
  a-z
  A-Z
  0-9
  ä ü ö
  Ä Ü Ö
  ß
  . - *

6.2.2.1 Add Selected Attribute

1. Select the attribute you need in the required order from the list of available classification attributes

2. Click the "Add Selected Attribute" button.

3. The "File Name" section lists the attributes you want to use for the file name.

4. Click "Save" to save your settings or click "Cancel" to abort the process.

6.2.2.2 Add Text Field

To insert a custom text field in the file name, complete the following steps:

1. Click the "Add Text Field" button.

2. The text field is inserted in the "File Name" section

3. Enter text using the permitted characters

4. Click "Save" to save your settings or click "Cancel" to abort the process.
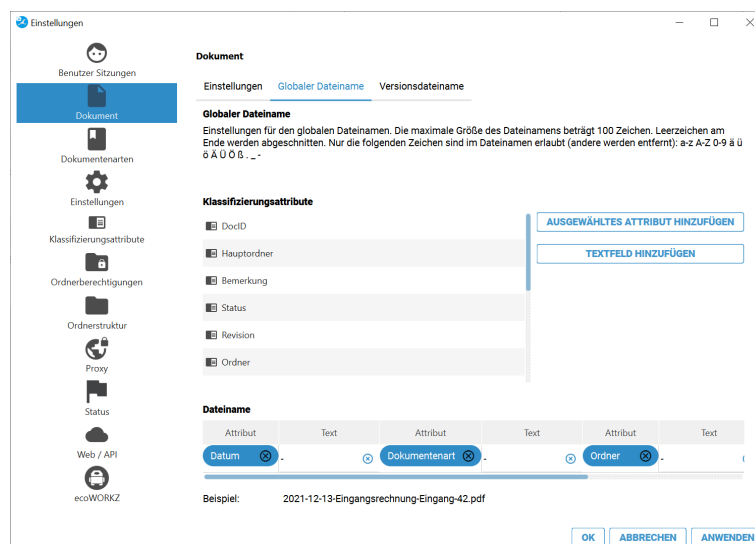
Figure 6.4: Settings: Global File Name (Here: Example Values)

6.2.3 Version File Name

Use this tab to make settings for the version file name. Use the version file name to export or send a document version from the ecoDMS version management. The "File Name" section lists the attributes and text you want to use for the file name.

– Click "x" next to the value to remove it.

    – The maximum length for the file name is 100 characters.
    – Trailing spaces are truncated.
    – The following characters are allowed for the name (others are removed)
    a-z
    A-Z
    0-9
    ä ü ö
    Ä Ü Ö
    ß
    . _ *

6.2.3.1 Add Selected Attribute

1. Select the attribute you need in the required order from the list of available classification attributes and version information

2. Click the "Add Selected Attribute" button

3. The "File Name" section lists the attributes you want to use for the file name

4. Click "Save" to save your settings or click "Cancel" to abort the process

6.2.3.2 Add Text Field

To insert a custom text field in the file name, complete the following steps:

1. Click the "Add Text Field" button

2. The text field is inserted in the "File Name" section

3. Enter text using the permitted characters

4. Click "Save" to save your settings or click "Cancel" to abort the process.
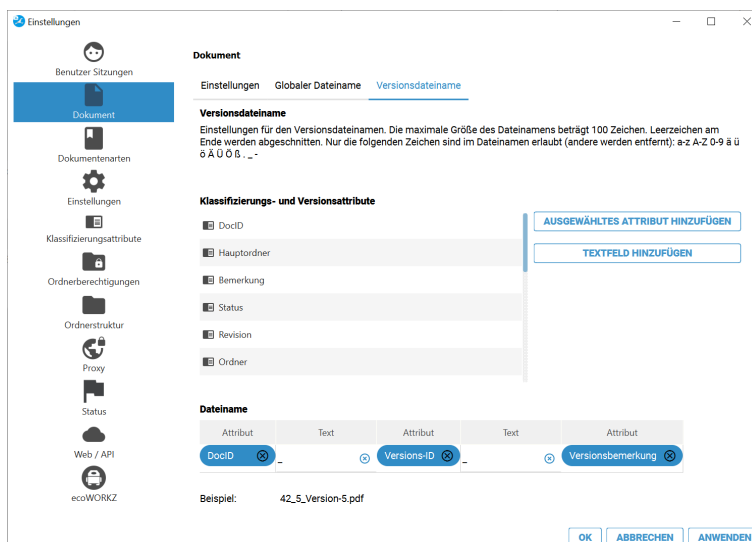
Figure 6.5: Settings: Version File Name (Here: Standard)

6.3 Document Types & Retention Periods

– Using archiving software changes the familiar folder structure. In a file system, customer folders often contain subfolders for Invoices, Offers, etc. This "complicated" structure is no longer necessary here.

– The previous sub folders are created in ecoDMS as document types. The folder structure therefore contains only main folders. The sub categories are created when classifying with the Document Type attribute.

– When assigning documents, the type of document (e.g. incoming invoices, outgoing invoices, agreement, offer is specified in Document Type.

– We recommend you select the Document Type when classifying each document you archive. This makes the handling and the retrieval of documents much easier.

– When searching for specific files, the documents can be filtered precisely.

– Please note that document types should not appear in the folder structure.
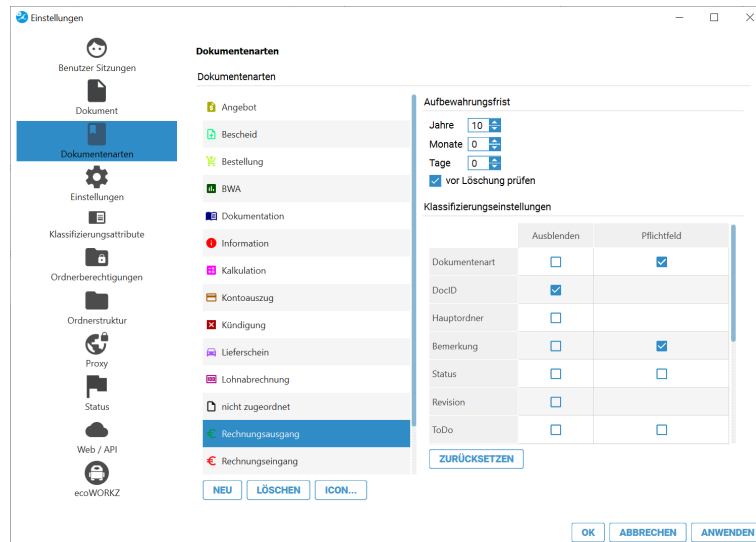
Figure 6.6: Settings - Document Types

6.3.1 Samples: Document Types

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

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

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

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

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

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

6.3.2 Create New Document Type

To create a new Document Type, complete the following steps:

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

2. Click the "New" button

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

4. Overwrite the entry with your custom name.

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

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

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

a) If you do not want to verify the matching documents with this document type prior to deleting them, you can disable the checkbox.

Figure 6.7: Settings- Document Types - Retention Period (Check before Erasure)

6.3.3 Retention Period

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

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

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

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

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

Figure 6.8: Settings - Document Types Incl. Retention Period

6.3.3.1 Create a Retention Period

To create a retention period:

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

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

   a) Years

    b) Months

    c) Days

3. The default setting in ecoDMS for each new document type is "Check before deletion." This means that documents can be removed from the archive if required, but for security reasons this process is subject to prior verification in the Trash.

    a) If you do not want to verify the matching documents with this document type prior to deleting them, you can disable the checkbox.

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

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

Aufbewahrungsfrist

Jahre	7	
Monate	0	
Tage	0	

☑ vor Löschung prüfen

Figure 6.9: Settings- Document Types - Retention Period (Check before Erasure)

6.3.4 Classification Settings

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

1. Hide non-required classification attributes.

2. Specify required fields for classification.

    a) You cannot select default attributes (e.g. DocID, revision, main folder, etc.) as required fields

3. Specify the order of attributes.

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

6.3.4.1 Set Configuration

For the configuration, complete the following steps:

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

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

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

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

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

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

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

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

6.3.5 Rename Document Type

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

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

2. Overwrite the existing name.

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

6.3.6 Delete Document Type

To delete a "document type", complete the following steps:

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

2. Click the "Delete" button.

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

6.3.7 Assign Icons

You can replace the default icon with a custom icon:

1. Select the entry.

2. Click the "Icon" button.

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

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

Figure 6.10: Settings - Integrated Icon Collection
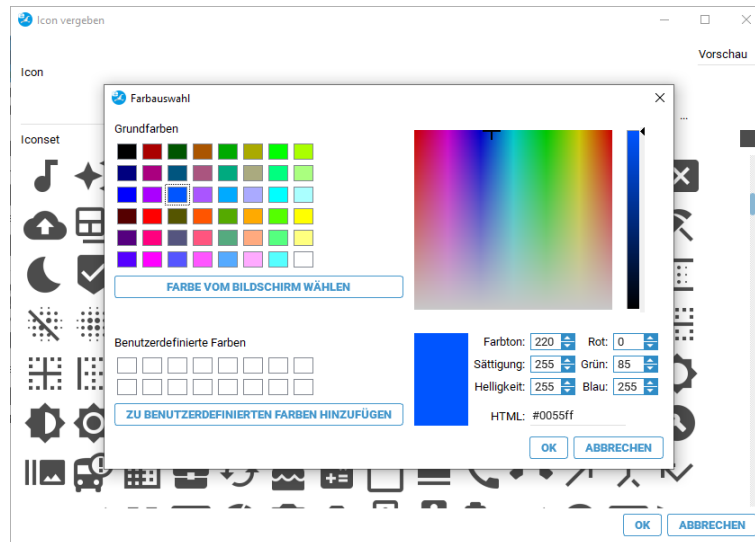
Figure 6.11: Settings - Integrated Icon Collection - Choose Color

6.4 Settings

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

6.4.1 General

In this area you can define several, general settings:
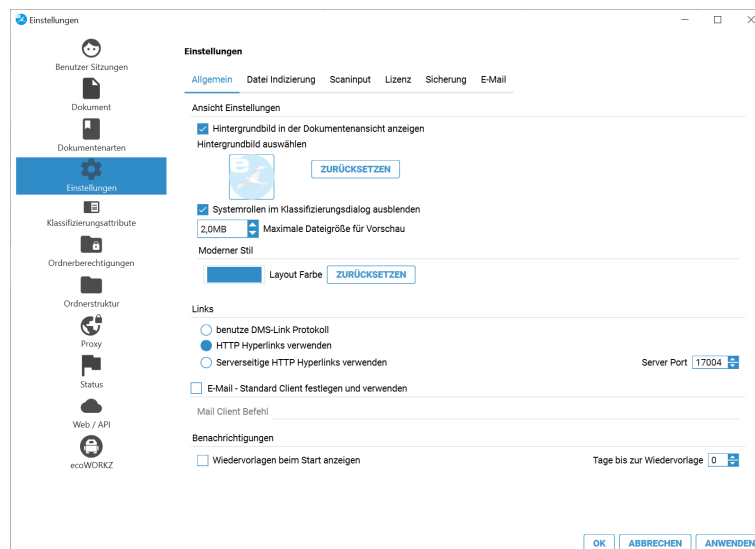
Figure 6.12: Settings - Settings - General

6.4.1.1 Display Background Image in the Document View

- Remove the tick for this entry if you do not want a background image.
- To change the background image, click the thumbnail preview.
- Click "Reset" to restore the default ecoDMS background image.

The ecoDMS programme icon is the default background image for the ecoDMS table.

1. Click the thumbnail preview of the current background image to change it

2. The file manager of your operating system opens

   a) Select the file with the background image from the target folder of your operating system

   b) Permitted file formats for the background image are: *.png, *.jpg, *.jpeg, *.bmp, *.svg

6.4.1.2 Hide System Roles in Classification dialog

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

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

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

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

6.4.1.3 Maximum File Size for Preview

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

1. Select the "Settings - General" tab.

2. Enter the maximum file size for the preview.

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

6.4.1.4 Layout Color

- You can customize the Color of ecoDMS Client. For example, if you are using several ecoDMS instances, like private DMS and work DMS, you can assign a custom Color to each instance. This allows you to better distinguish the two instances from each other.
  Example:
  - Private ecoDMS: Orange
  - Business ecoDMS: Blue
- Click "Reset" in the "Modern Style" area to reset the layout Color to the original Color (ecoDMS blue).

To change the layout Color, complete the following steps:

1. In the settings dialog, select the "Settings - General" tab

2. In the "Modern Style" area, click the current layout Color

3. Select the new Color in the Color dialog

4. Confirm your selection with "OK"

5. The Color you chose is applied to ecoDMS Client

6. Save the process by clicking "Apply" in the settings dialog
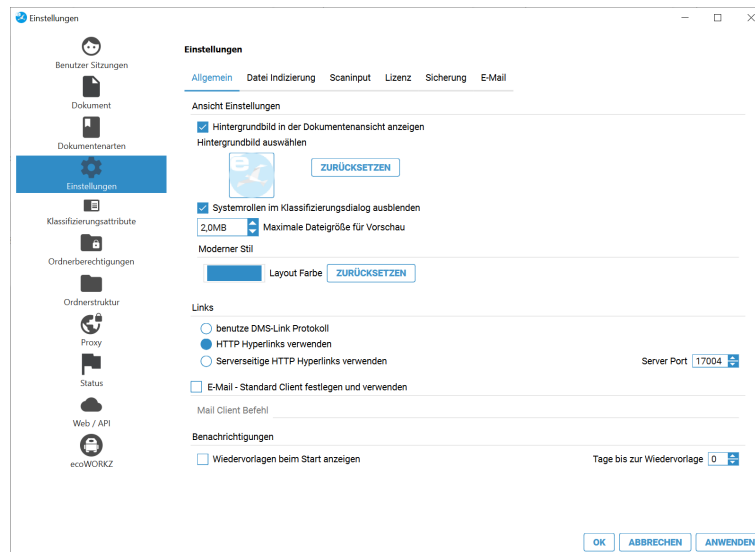
Figure 6.13: Settings - Settings - General - Layout Color (Default: Blue)
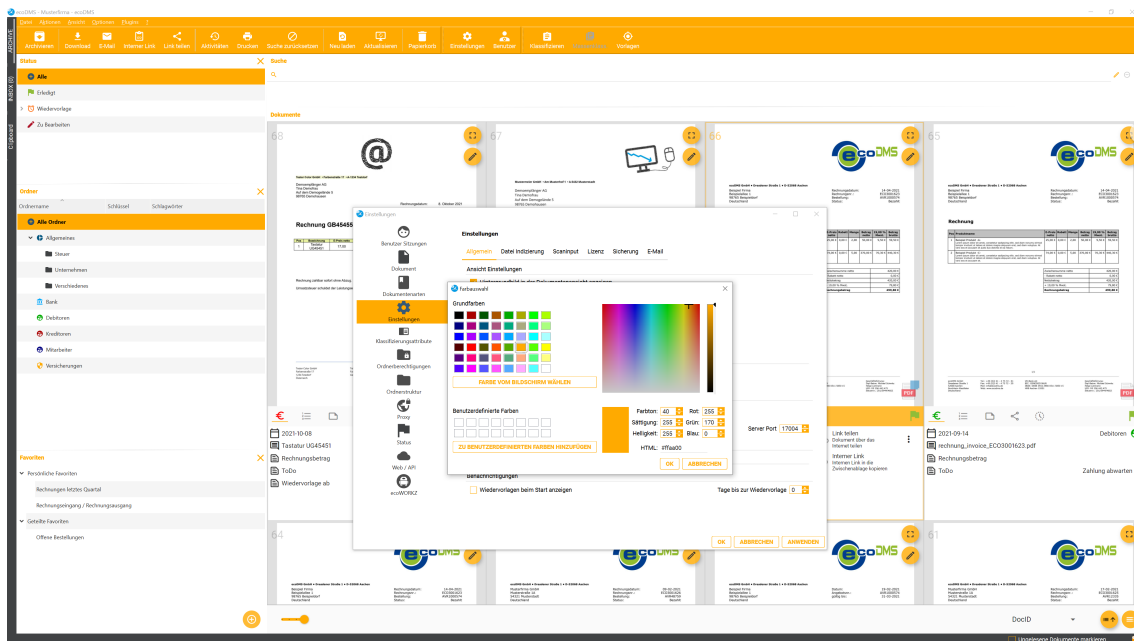
Figure 6.14: Settings - Settings - General - Layout Color (Changed, Example: Orange)

6.4.1.5 Links

- **Attention on terminal servers:** If you are running ecoDMS on a terminal server, we recommend using central (server-side) HTTP hyperlinks. "Normal HTTP hyperlinks" cannot be guaranteed for terminal servers.
- The link feature is only used for INTERNAL document calls. This requires access to the ecoDMS server!
- Use the link feature to send folder and document links to other ecoDMS users and/or copy them to the clipboard.
- To ensure the links are called properly, configure the correct ecoDMS server port in the settings.
- For more information on how to call such links, refer to the feature description in this manual: 21

ecoDMS offers various options for creating links. Select the link setting in the Settings dialog. The following link types are available:

1. Use DMS-Link protocol

    - To open the link, ecoDMS requires a connection through the connection manager
    - The user needs access permissions to the document (folder permission / document permission via classification)
        - Document -> Copy link to clipboard: The file opens in the software specified for the respective file format
        - Folder-> Copy link to clipboard: The folder opens in the ecoDMS client
    - Example link to a document in a local installation setting:

    ```
    dms-link://DESKTOP-5F074KC:17001/openDoc?openmode=1&docid=68&archive=1
    ```

2. Use HTTP Hyperlinks

    - To open the link, ecoDMS requires a connection through the connection manager
    - The user needs access permissions to the document (folder permission / document permission via classification)
        - Document -> Copy link to clipboard: The file opens in the software specified for the respective file format
        - Folder-> Copy link to clipboard: The folder opens in the ecoDMS client
    - Example link to a document in a local installation setting:

    ```
    http://localhost:17003/openDoc?openmode=1&docid=68&archive=1&host=DESKTOP-5F074KC&port=17001
    ```

3. Use Central HTTP Hyperlinks

    - To open the link, ecoDMS DOES NOT require a connection through the connection manager
    - However, the user must have access to the ecoDMS server
    - To open the link, the system asks for user credentials
    - The user needs access permissions to the document (folder permission / document permission via classification)
        - Document -> Copy link to clipboard: The file opens in the software specified for the respective file format
        - Folder-> Copy link to clipboard: The folder opens in the ecoDMS client
    - Example link to a document in a local installation setting:

    ```
    http://DESKTOP-5F074KC:17004/rest/doc/file?docId=68&archiveId=1
    ```

6.4.1.6 Email - Define and Use Default Client

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

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

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

3. Enter "Mail Client Command"

   a) **Example Thunderbird:**

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

   b) **Example Office 365**

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

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

6.4.1.7 Display Resubmissions on Launch

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

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

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

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

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

6.4.2 File Indexing

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

Use this tab to view OCR information and make settings for full-text indexing (OCR) in ecoDMS.

6.4.2.1 Indexing Status

You can view the current indexing status of the full-text recognition here. Folgende Informationen sind verfügbar:

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

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

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

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

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

6.4.2.2 OCR Options

- Please note that when enabled, this function only applies to documents that are archived for the first time.
- Documents already in the archive are not re-indexed.

You can enable ecoDMS OCR (full-text indexing) as default for all new documents. This means, for example, that during the archiving process ecoDMS reads, recognizes, and archives documents processed by a different OCR software with the ecoDMS text information. To enable this function,

- check the box "Discard and recreate existing OCR of documents".

6.4.2.3 OCR Language Support

- Please note that when enabled, this function only applies to documents that are archived for the first time.
- Documents already in the archive are not re-indexed.
- Please note that multiple languages require respective processing power, which may have an impact on performance.
- If you deselect all languages, ecoDMS automatically uses the default languages for text recognition.

The ecoDMS OCR recognises different languages during indexing. You can select the supported languages here. The following languages are available:

- German (Default)
- English (Default)
- French
- Spanish
- Dutch
- Turkish
- Italian
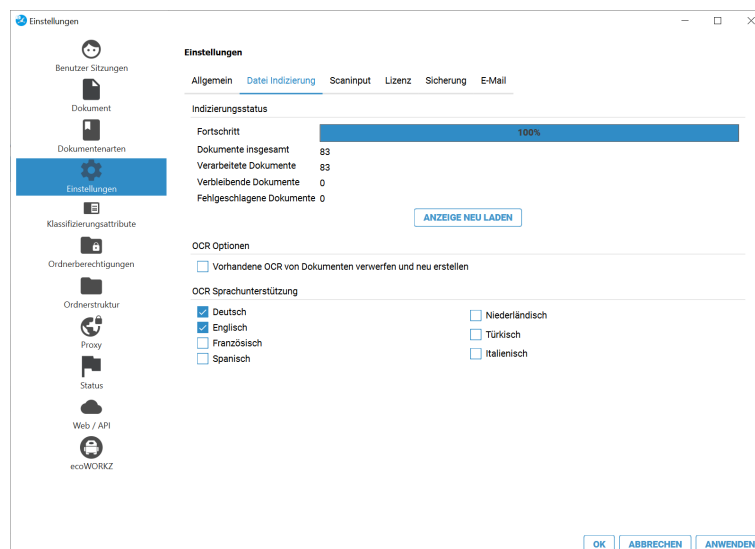
Figure 6.15: Settings - Settings - File Indexing

6.4.3 Scaninput

Refer to the separate chapter in this manual: 9.2

6.4.4 Lizenz

Refer to the separate chapter in this manual: 2

6.4.5 Backup

Refer to the separate chapter in this manual: 28

6.4.6 Email / SMTP Settings

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

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

```
demoserver
```

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

```
25
```

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

```
STARTTLS
SSL/TLS
None
```

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

```
sampleuser
```

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

```
12345
```

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

```
sampleuser@demoserver.de
```

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

8. Save the process by clicking "Apply" in the settings dialog.
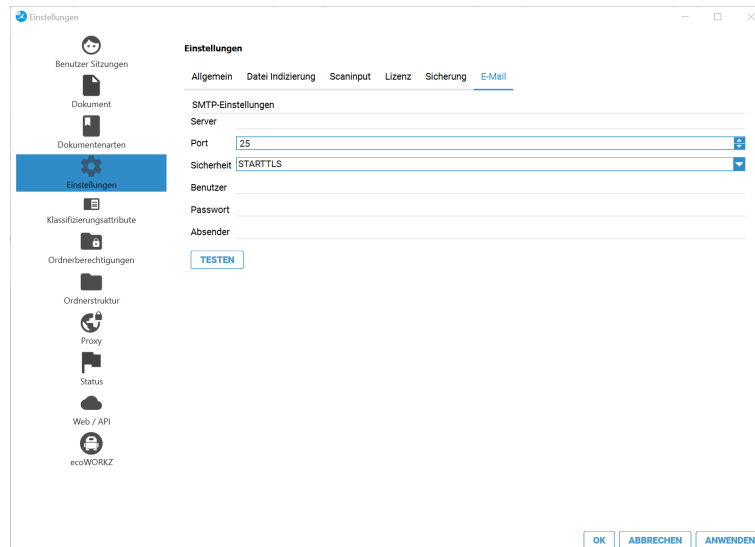
Figure 6.16: Settings - Settings - Email - SMTP Settings

6.5 Classification Attributes

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

> Various types of attributes are available to create custom classification attributes. Please note the following:
> - Once you have created an attribute, it cannot be deleted, but it can be renamed, edited and / or disabled.
> - You cannot use the same attribute name multiple times.
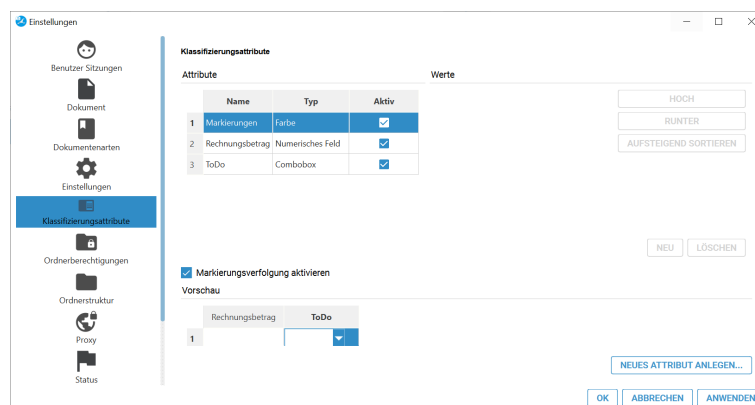
Figure 6.17: Settings - (Own) Classification Attributes
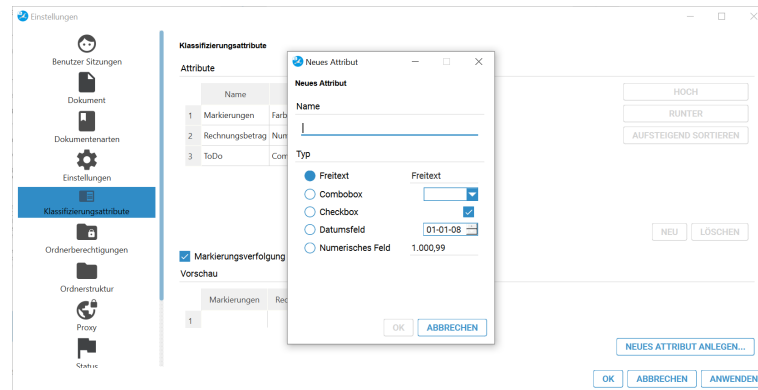
Figure 6.18: Settings - Classification Attributes - Create New Attribute

6.5.1 PDF Highlight Tracking

Use the integrated ecoDMS PDF Editor to highlight text in various colors in PDF documents (refer to **??**). You can then filter by and summarize the highlights in a highlight report. Enable PDF highlight tracking in the Settings dialog to track highlights and create highlight reports in the document management system.

1. Select the "Classification Attributes" tab in the "Settings" dialog.

2. Select "Enable PDF highlight tracking".

3. Click "Apply" to save the setting.

4. A classification attribute displays which shows the highlight colors saved for a document.

6.5.2 Free Text

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

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

2. Click the button "Create New Attribute".

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

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

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

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

6.5.3 Combobox

The standard attribute 'Status' is an example for a Combobox.

The "Combobox" enables you to assign fixed values, which are displayed as a selection list during classification.
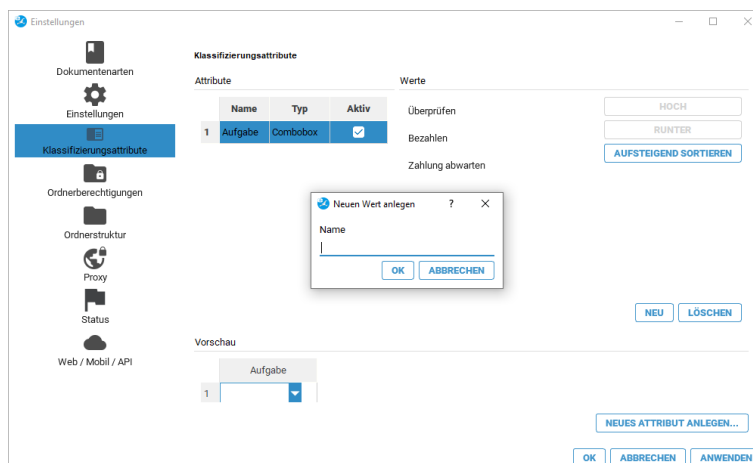
Figure 6.19: Settings - Classification Attribute - Combobox Values

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

2. Click the button "Create New Attribute".

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

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

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

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

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

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

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

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

6.5.3.1 Combobox: Sort Values

The order of the values in a combobox created by the user can be changed as required.

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

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

3. Now you have the following options to sort the values.
   a) Now click "Ascending" in the "Values" area to sort the values in ascending order.
   b) Now click "Descending" in the "Values" area to sort the values in descending order.
   c) Select a value and move it with the button...
      i. "Up" in order upwards
      ii. "Down" in order downwards

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

6.5.3.2 Combobox: Delete Values

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

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

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

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

4. Click "Delete".

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

6.5.4 Checkbox

The "checkbox" can be ticked during classification.

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

2. Click the button "Create New Attribute".

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

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

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

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

6.5.5 Date Field

With the "date field" you can create custom date fields for classification.

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

2. Click the button "Create New Attribute".

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

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

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

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

6.5.6 Numeric Field

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

1. **Default settings for GermTo:** Numbers and a maximum of 1 decimal point per entry are allowed as values.
   a) If a number is entered, for example, with a dot as 1000 separator, the dot will be removed from the system when saving.
   b) Input: 1.000.000,00 = Output: 1000000,00
2. **Default settings for English:** Numbers and a maximum of 1 dot per entry are allowed as values.
   a) If a number is entered, for example, with a decimal point as 1000 separator, the decimal point will be removed from the system when saving.
   b) Input: 1.000.000,00 = Output: 1000000.00
3. **Swiss format:** The apostrophe can be inserted as 1000 separator.

To create a "Numeric Field":

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

2. Click the button "Create New Attribute".

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

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

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

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

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

6.5.7 Enable / Disable Attributes

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

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

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

    a) **Activated:** Put a check mark in the column "Activated" to activate and enable it for classification.

    b) **Disabled:** Remove the check mark in the column "Activated" to disable it, so it will not be displayed for classification.

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

6.5.8 Rename Attributes

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

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

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

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

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

6.6 Folder Permissions

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

When assigning folder permissions, please note the following:

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

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

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

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

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

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

7. If a folder has a permission, then the "Scanner" role should also be enabled for this folder. Otherwise the classification templates - depending on the folder permission - for scanned documents in the Inbox may not access the required folder for security reasons.
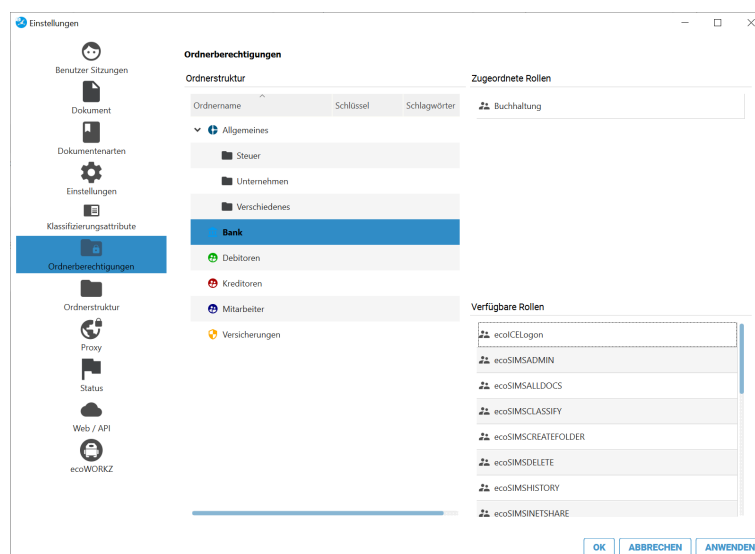
Figure 6.20: Settings - Folder Permissions

6.6.1 Assign Folder Permissions

If you want to assign specific users and / or groups on folders, complete the following steps:

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

2. Select the required folder in the Folder Structure.

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

4. You can repeat this operation for other folders.

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

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

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

6.6.2 Remove Folder Permissions

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

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

2. Select the required folder in the Folder Structure.

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

4. You can repeat this operation for other folders.

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

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

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

6.6.3 User Example

Case 1:

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

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

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

    a) Folder: Tax

    b) Document type: Incoming invoices

    c) Status: ToDo

    d) Permissions: For classify by all users

Explanation for case 1:

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

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

Case 2:

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

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

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

    a) Folder: Tax

    b) Document type: Incoming invoices

    c) Status: ToDo

    d) Permissions: For classify for "Peter Smith"

Explanation for case 1:

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

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

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

6.7 Folder Structure

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

– We recommend you create a flat and simple structure.

– Create as few folders as possible.

– Use the advantages of the integrated document classification.

– Take care not to confuse subfolders with document types.

Here you create the Folder Structure. ecoDMS differentiates between main folders and subfolders.
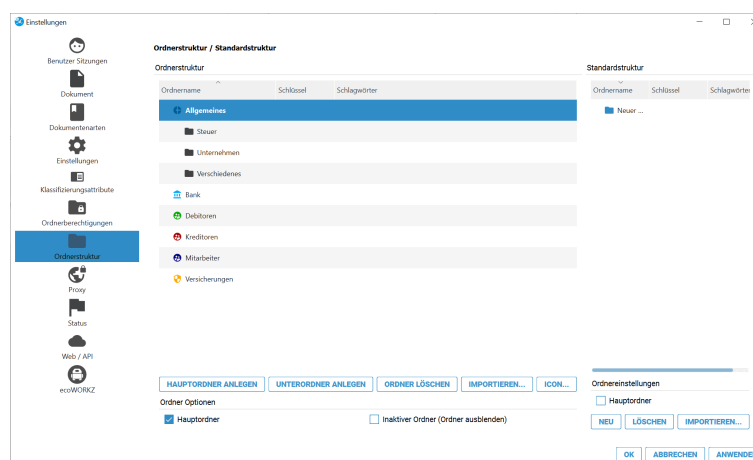
Figure 6.21: Settings - Folder Structure

6.7.1 Create Main Folder

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

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

2. Click the button "Create Main Folder".

3. A dialog opens. Enter the following information:

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

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

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

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

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

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

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

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

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

5. Click "Apply" to save the process in the settings dialog.
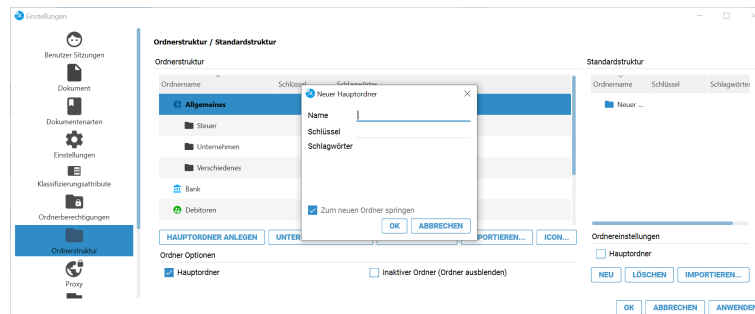
Figure 6.22: Settings - Folder Structure - Create New Main Folder

6.7.2 Convert Folder to Main Folder

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

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

2. Select the folder in the Folder Structure.

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

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

6.7.3 Create Subfolder

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

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

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

3. Click the button "Create Sub Folder".

4. A dialog opens. Enter the following information:

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

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

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

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

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

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

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

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

6. Click "Apply" to save the process in the settings dialog.
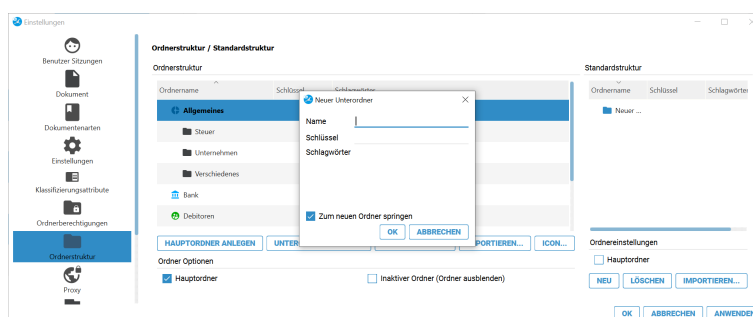
Figure 6.23: Settings - Folder Structure - Create New Sub Folder

6.7.4 Keywords

When creating folders (main folders / sub folders), you can assign keywords. This is an alphanumeric field. Our keywords can have different functions and can be used in different ways in ecoDMS.

> The following lists examples for keywords:
> - Customer ID
> - Address information
> - Project information
> - VAT ID
> - all "keywords" which allow automatic folder recognition when archiving documents

6.7.4.1 Automatic Folder Assignment (Keywords)

If you scan and archive a document with the PDF/A printer or via an Office plugin, and ecoDMS does not detect a template, the document can still be assigned to the respective folder using the keywords. ecoDMS automatically assigns the document to the matching folder if

1. the keywords are in a document,

2. ecoDMS recognises the keywords in a document

3. and keyword recognition in ecoDMS is enabled

- To automatically assign the folder, the stored keywords must fully match the keywords in the document.
- Use unique keywords such as the VAT number of a company or a customer code.
- Enter the keywords without a dash or a comma.
- The keywords you enter are linked with an OR operation and must therefore have the same notation as those in the document.
- Ensure that "Automatic Folder Recognition" is enabled for the automatic keyword recognition. For more information, refer to the following section: 11.7
- Information: For manual keyword support (= the keywords should NOT automatically lead to folder assignment), disable recognition in ecoDMS. In addition, you need to disable automatic template recognition in the same place (not recommended).

6.7.4.2 Automatic Folder Assignment (Keywords)

- Enter the keywords without dash or comma (recommended for automatic recognition).
- The keywords you enter are linked with an OR operation and must therefore have the same notation as those in the document (recommended for automatic recognition).

When searching for a folder (in the client folder tree or when classifying documents), you can search for folders using keywords. To do so, you do not need to know the exact name of the folder. Instead, you can use an address or other criteria, which are pre-configured in the keywords, to search for a folder.

6.7.4.3 Change Keywords

Keywords can be changed if necessary. Complete the following steps:

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

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

3. Enter the new keywords.

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

6.7.5 Rename Folder

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

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

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

3. Enter the new name.

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

6.7.6 Delete Folder

You can delete folders if they do not contain any documents and/or subfolders:

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

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

3. Click "Delete Folder".

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

6.7.7 Change Key

Keys can be changed if necessary. Complete the following steps:

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

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

3. Enter the new key.

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

6.7.8 Import a Folder Structure

You can import an existing folder structure as an XML file:

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

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

3. Select the XML file and open it.

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

6.7.8.1 Valid XML Items

1. name (folder name)

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

3. buzzwords (keywords)

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

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

6.7.8.2 XML Sample

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

6.7.9 Assign Icons

You can replace the default icon with a custom icon:

1. Select the entry.

2. Click the "Icon" button.

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

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

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

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

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

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

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

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

Figure 6.24: Settings - Integrated Icon Collection
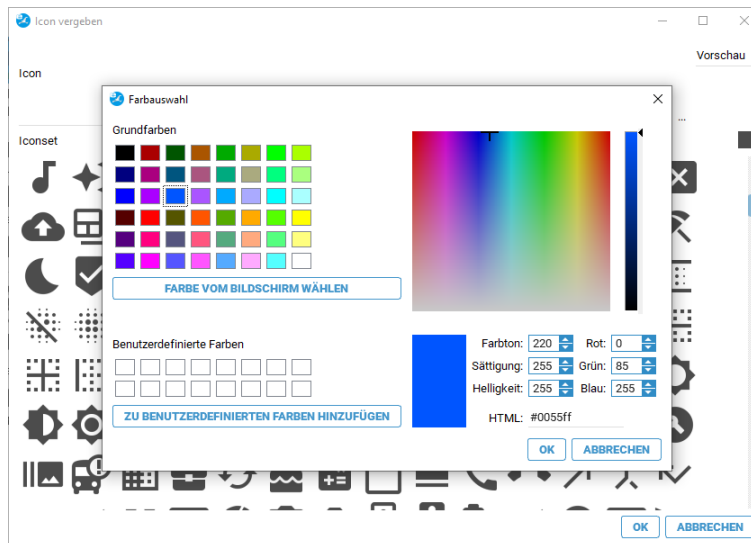
Figure 6.25: Settings - Integrated Icon Collection - Choose Color

6.7.10 Inactive Folder (Hide Folder)

Folders that are not being used or are not needed can be hidden for all users. The inactive folders are not visible for users.

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

2. Select the folder in the Folder Structure.

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

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

6.7.11 Default Structure

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

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

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

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

6.7.11.1 Create a New Folder in the Default Structure

To create a new folder in the Default Structure, complete the following steps:

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

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

3. Click "New" in the "Default Structure".
   a) A folder is automatically created.
   b) Create a default structure with any number of folders
   c) If you want to declare a folder as a "main folder" in the default structure, check the "Main Folder" checkbox.
   d) The structure can contain any number of main folders and subfolders.

4. Click "Apply" to save the settings

5. Now create your new structure for the folder you selected in the folder structure
   a) The new folders automatically contain the default structure you created

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

6.7.11.2 Import a Default Structure

You can import an existing default folder structure as an XML file:

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

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

3. Select the XML file and open it.

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

6.7.11.2.1 Valid XML Items

1. name (folder name)

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

3. buzzwords (keywords)

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

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

6.7.11.2.2 XML Sample

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

6.7.11.3 Delete Folder from Default Structure

You can delete folders if they do not contain any documents and/or subfolders.

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

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

3. Click "Delete".

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

6.7.12 Folder Structure: Additional Functions in ecoDMS

There are various functions and commands for the folders created in ecoDMS.
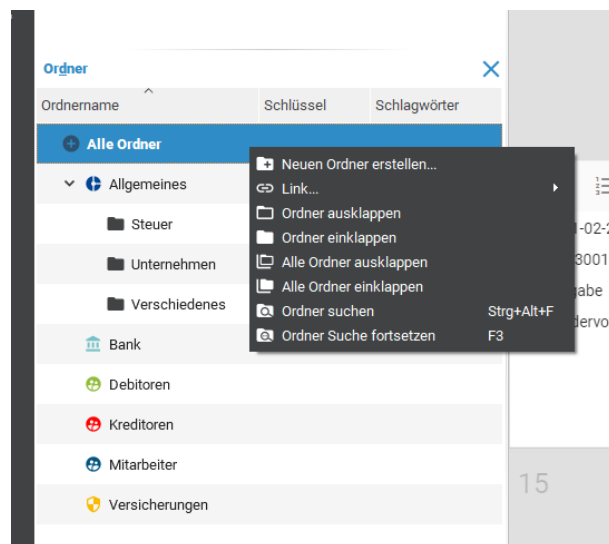
Figure 6.26: Folder Structure - Functions when right-clicking on a Folder

6.7.12.1 Create New Folder

You can also create folders directly through the Classification dialog or the folder structure if you have the according permission. Complete the following steps:

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

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

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

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

3. A dialog opens. Enter the following information:

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

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

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

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

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

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

6.7.12.2 Skip to Folder

1. Select the document in the ecoDMS table.

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

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

6.7.12.3 Expand / Collapse Folders

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

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

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

2. Click "Expand Folder".

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

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

2. Click "Collapse Folder".

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

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

2. Click "Expand All Folders".

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

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

2. Click "Collapse All Folders".

6.7.12.4 Order of the Folder Structure

You can change the order of the folders:

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

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

6.7.12.5 Hide Column(s)

The folder structure contains various columns:

1. Folders

2. Key

3. Keywords

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

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

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

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

6.7.12.6 Show Column(s)

The folder structure contains various columns:

1. Folders

2. Key

3. Keywords

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

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

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

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

6.8 Proxy

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

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

To enable the Proxy for ecoDMS, complete the following steps:

1. Select the Proxy tab in the settings dialog.

2. Enable the "Use Proxy" checkbox.

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

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

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

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

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

   b) **Password:** Enter the matching password here.
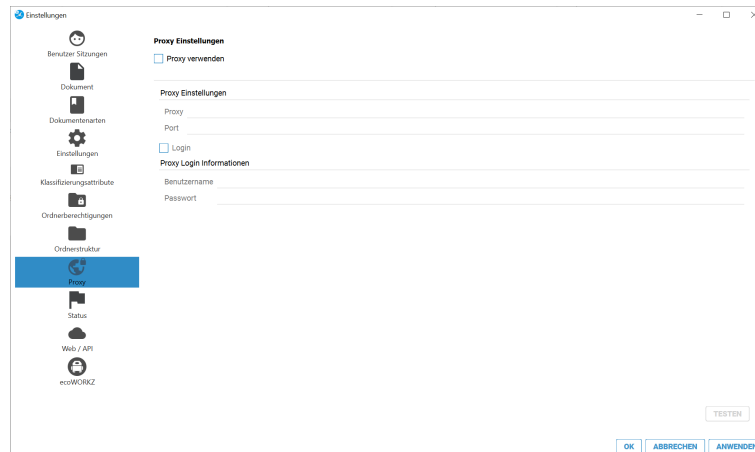
Figure 6.27: Settings - Proxy (Function is currently disabled)

6.9 Status

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

1. Done

2. Resubmission

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

      i. Expired

      ii. Next 7 days

3. To Do

Tip:
- Do NOT assign new "statuses" such as "Check", "Pay", "Book", "Sign", etc. Create such "To Dos" as "tasks" in a separate "classification attribute".
- Then you can, for example, assign the "To Do" status and, in addition, allocate the associated tasks.
- This makes filtering documents much easier and helps you to make optimal use of the system.
- A task should therefore not be a Status.
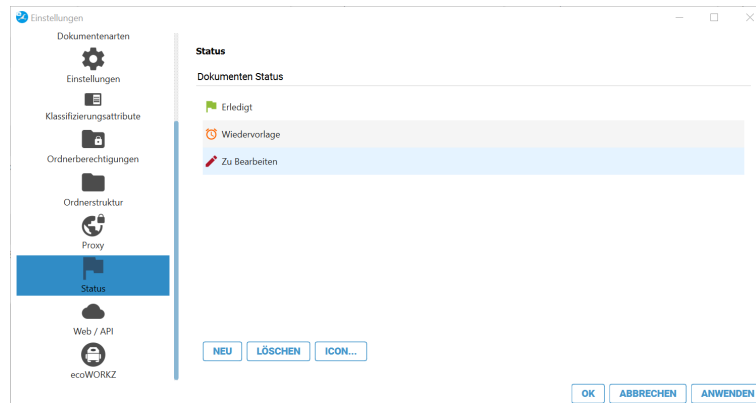
Figure 6.28: Settings - Statuses

6.9.1 Create New Status

To create a new Status, complete the following steps:

1. Select the tab Status in the settings dialog.

2. Click the "New" button

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

4. Overwrite the entry with your custom name.

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

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

6.9.2 Rename Status

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

1. Select the tab Status in the settings dialog.

2. Select the Status.

3. Overwrite the entry with your custom name.

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

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

6.9.3 Delete Status

You can delete statuses if they do not contain any documents.

1. Select the tab Status in the settings dialog.

2. Click the "Delete" button

3. Repeat this process to delete more statuses.

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

6.9.4 Assign Icons

You can replace the default icon with a custom icon:

1. Select the entry.

2. Click the "Icon" button.

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

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

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

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

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

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

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

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

Figure 6.29: Settings - Integrated Icon Collection
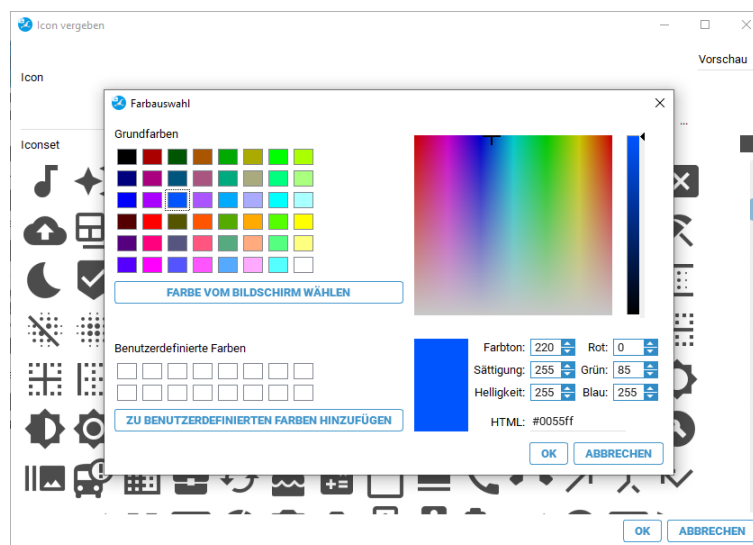
Figure 6.30: Settings - Integrated Icon Collection - Choose Color

6.10 Web / API

You can access ecoDMS with ecoDMS Client, Web Client and API REST service. Enable or disable and manage the required services in this area of the settings.

6.10.1 Web Access

> Examples for using the web service with enabled remote access are: Accessing ecoDMS
> - from your home office
> - or via the mobile network from your smart phone, tablet or laptop when you are travelling
> - or from other networks (for example, when you are travelling abroad)
>
> **The Web Client has a separate manual. It contains detailed information about how to activate, deactivate and use the web service, including remote access, and how to use the Web Client. You can download the manual for free on the ecoDMS website.**

Use ecoDMS Web Client to access ecoDMS through a current internet browser from your PC, laptop, smart phone or tablet. In order to use the web client, the corresponding web service must be running. If web access is enabled, the default behaviour is that users can access the web client within their own network. If you want to enable access to ecoDMS from outside your network via Web Client, you must enable remote access in the ecoDMS settings.
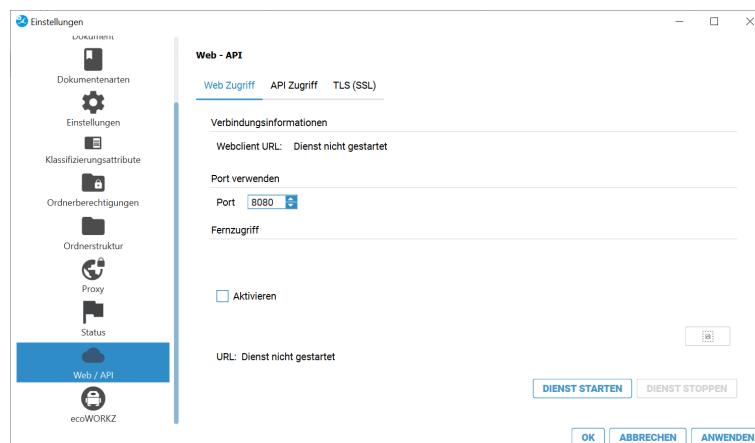
Figure 6.31: Settings - Web Access

6.10.2 API Access

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

> **The ecoDMS API has a separate online documenation. It contains detailed information on how to activate, deactivate and use the interface via API REST service.**
>
> `https://confluence.applord-gruppe.eu/api`
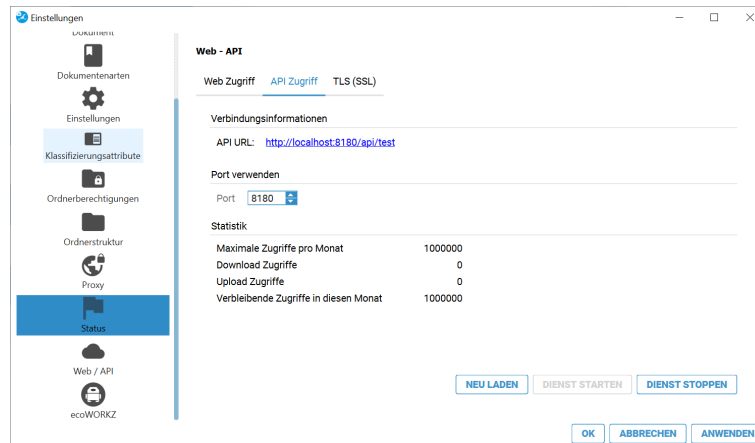
Figure 6.32: Settings: API Access (API REST Service)

6.10.3 TLS (SSL)

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

Access to the web client and ecoDMS API can be done TLS (SSL) encrypted.
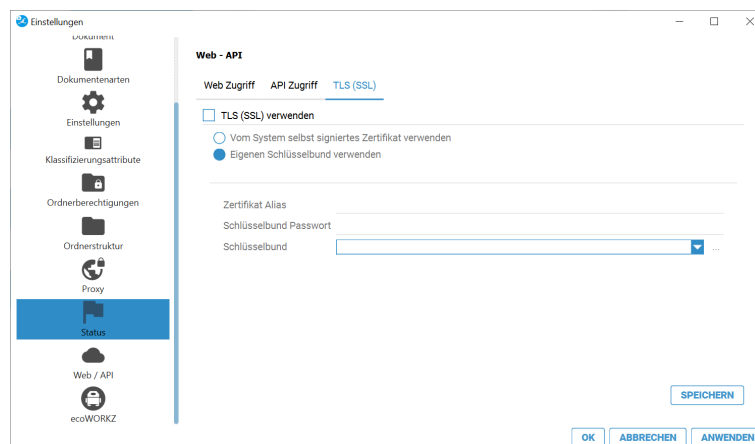
Figure 6.33: Settings: TLS (SSL)

6.10.3.1 Use a Self-Signed Certificate Generated by the System

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

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

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

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

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

6.10.3.2 Use My Keystore

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

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

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

3. Click "Use my keystore".

4. Enter the following information:

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

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

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

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

        ii. Confirm your selection and upload the keystore.

        iii. Select the keystore from the list.

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

7 Archiving

This chapter describes the various archiving options available in the ecoDMS client.

Information

- ecoDMS offers various document archiving features, including ecoDMS Client, ecoDMS Webclient, Side Panel, Drag & Drop, Snapshot, plug-ins for Office and email applications, PDF/A printer, scanning (inbox in ecoDMS / Scaninput folder) ...
- If you select a folder in ecoDMS, it is automatically used for classification.
- The preview in the classification dialog only displays PDF documents and files which are archived with the ecoDMS plugins or the PDF/A printer.

Document origin

- When archiving, the files must be on a local hard disk.
- Network drives (share directories) are only supported during archiving if they are an immediate part of the system.
- You cannot archive directly from a simple shared folder.

Archiving formats

- ecoDMS always stores archived files in their original format.
- Office documents or emails are only additionally converted to PDF/A format when archiving with an ecoDMS plugin.
- By default, ecoDMS converts TIFF, PNG, JPG, X-invoices and non-readable PDF files to a full-text searchable PDF file in a background process.
  - In this case, ecoDMS saves the original file in the version management and displays the PDF in a card or the table.

X-Invoices

- ecoDMS recognises, converts and archives X-invoices via scaninput, desktop client and webclient.
- The term "X-invoice" stands for "XML-based semantic invoice data model". Die enthaltenen Daten werden strukturiert, so dass sie maschinenlesbar sind.
- In a background process, the system automatically converts the encoded invoice into a readable PDF file.
- Moreover, you can apply classification templates to invoices for automatic association and archiving.

7.1 Function: Archiving

You can select and archive one or more documents from your file system.

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

Figure 7.1: Icon - Archive

2. A window opens with access to the file system. Here you can select the file(s) you need. The following additional functions are available:

   a) **Move file(s) to archive:** ecoDMS moves the file(s) to the archive and removes them from the file system.

   b) **Archive file(s) as version:** The file(s) are archived as versioned document in ecoDMS, so that after archiving, more versions can be added to the document.

3. To load the file(s), click "Open".
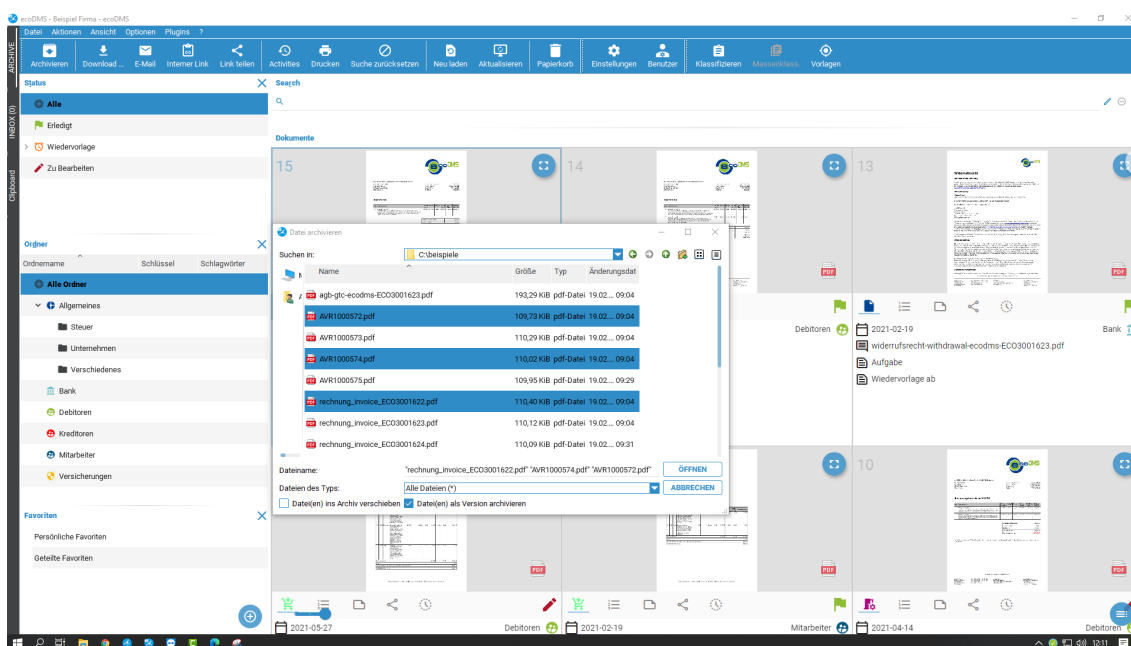
Figure 7.2: Function: Archive (here: Archive file(s) as version)

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

5. If you selected several documents, you are asked to select the classification method.

Refer to the "Classification" chapter in this manu

- **Classify Individually**: The documents are classified one by one.
- **Mass classification:** All selected documents receive the same classification.
- **No classification:** (Method is not recommended.) The documents are archived but not classified. However, the documents can also be classified later.
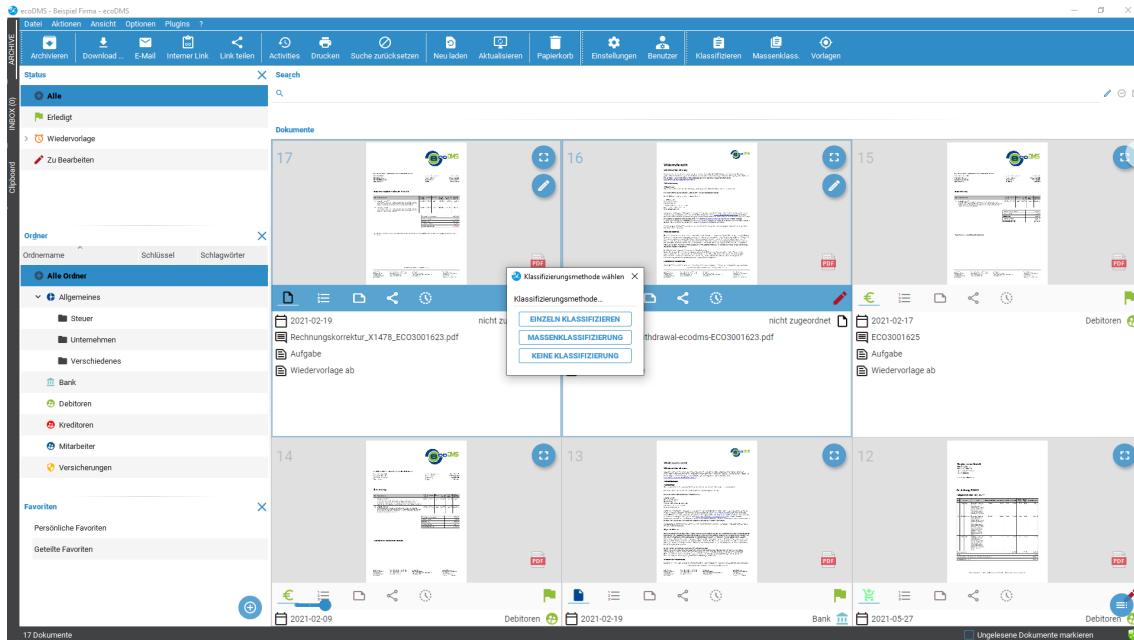
Figure 7.3: Select Classification Method

7.2 Drag and Drop

You can move documents into ecoDMS with the drag & drop function:

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

2. The following additional functions are available:

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

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

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

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

    c) You can also combine both shortcuts.

3. Schieben Sie Dokumente in die Dokumentenansicht oder direkt auf den gewünschten Zielordner in der ecoDMS-Ordnerstruktur.

4. If you selected several documents, you are asked to select the classification method.

If you selected several documents, you are asked to select the classification method. To read more about the individual methods, refer to the "Classification" chapter in this manual.

1. **Individual Classification:**
   a) Each file is classified individually one after the other.
   b) Click the "Save and Continue" button to save the current classification and display the next document in the classification dialog
      i. If classification templates are detected, ecoDMS displays the matching attributes
      ii. Attention: Depending on your settings, the search may return various templates for one file.
      iii. Before you save, make sure you choose the correct template(s).
      iv. If there are several classification options for one document, they are displayed as a tab in the classification dialog (For more information, refer to chapter 10.6.2).
2. **Mass Classification:** All selected documents receive the same classification. The classification is assigned once.
3. **No Classification:** (Method not recommended) The documents were archived but not classified). However, the documents can also be classified later on.
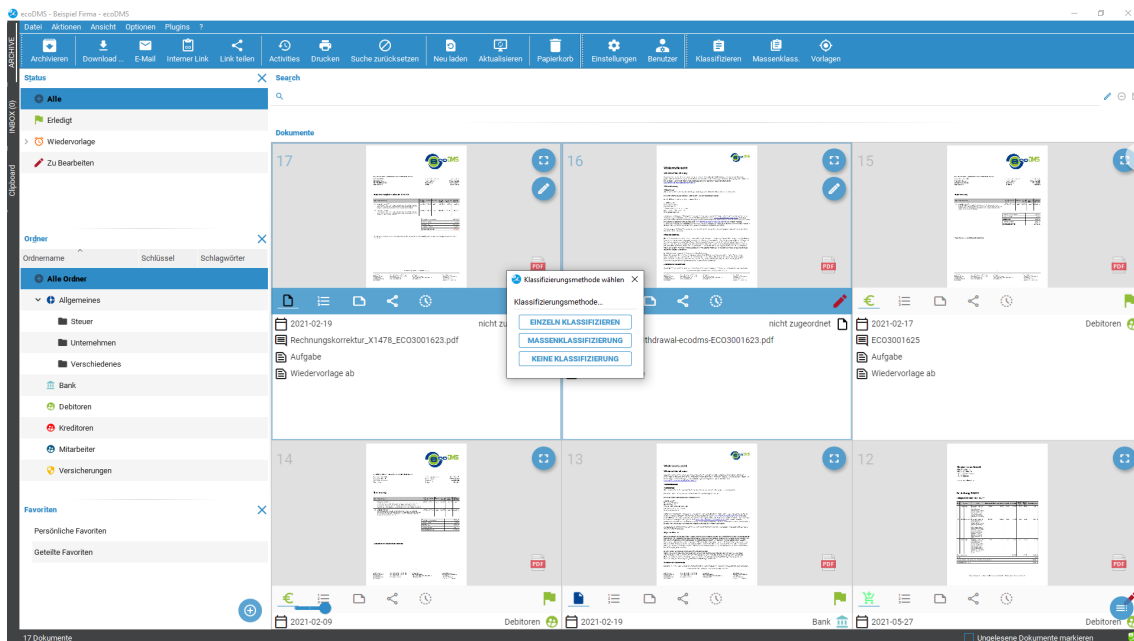
Figure 7.4: Select Classification Method

7.3 Move File(s) to Archive

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

1. **Archiving with the drag & drop function**
   a) Select one or several documents you want to archive (on the desktop, for example).
   b) Press the "CTRL" shortcut and drag the documents from your filesystem to the ecoDMS table via drag & drop.
      i. ecoDMS archives the file(s) as versioned document(s), so that you can add more versions to the archived document.

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

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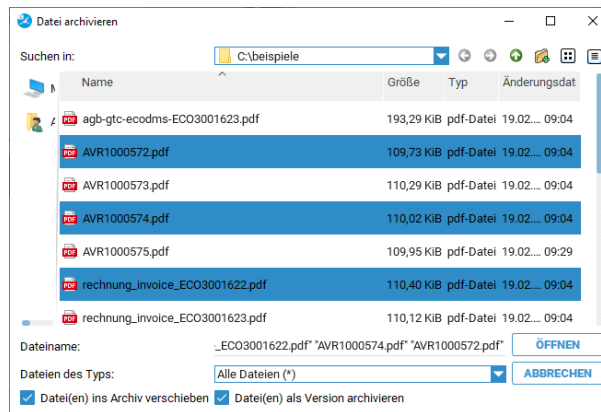
Figure 7.5: Move File(s) to Archive

7.4 Archive File(s) as Version

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

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

   a) Select one or more documents in the file system

   b) Press and hold the Alt key and drag and drop the document(s) into ecoDMS

      i. straight into the card view

      ii. straight into the table view

      iii. straight onto a folder in the folder tree

2. **ecoDMS Function**

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

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

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

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

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

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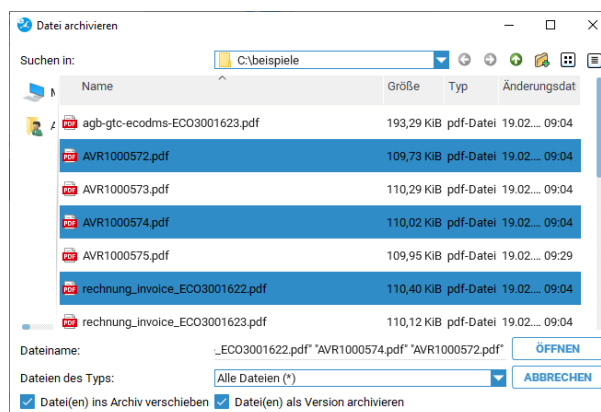
Figure 7.6: Archive File(s) as Version

3. **Office and Email Plugins**

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

8 Side Panel

Use the side panel to archive files from the file system with drag and drop. ecoDMS does not need to be open because the Side Panel is positioned on the right side of the monitor above the Connection Manager after activation. You can drag and drop the files you want to archive onto the panel. Depending on the documents you select and file recognition, the documents are automatically assigned (classified) during the archiving process.

- This function requires a license for the full version of ecoDMS but can also be tested in the trial version. This function is not enabled in the Free4Three version.
- Please note that these settings refer to the individual workstation and are not stored in the user profile.
- When archiving, the files must be on a local hard disk.
- Network drives (share directories) are only supported during archiving if they are an immediate part of the system.
- You cannot archive directly from a simple share directory.
- ecoDMS always stores archived files in the original format. During the archiving process, ecoDMS by default converts TIFF, PNG, JPG and non-readable PDF files to a searchable PDF file.
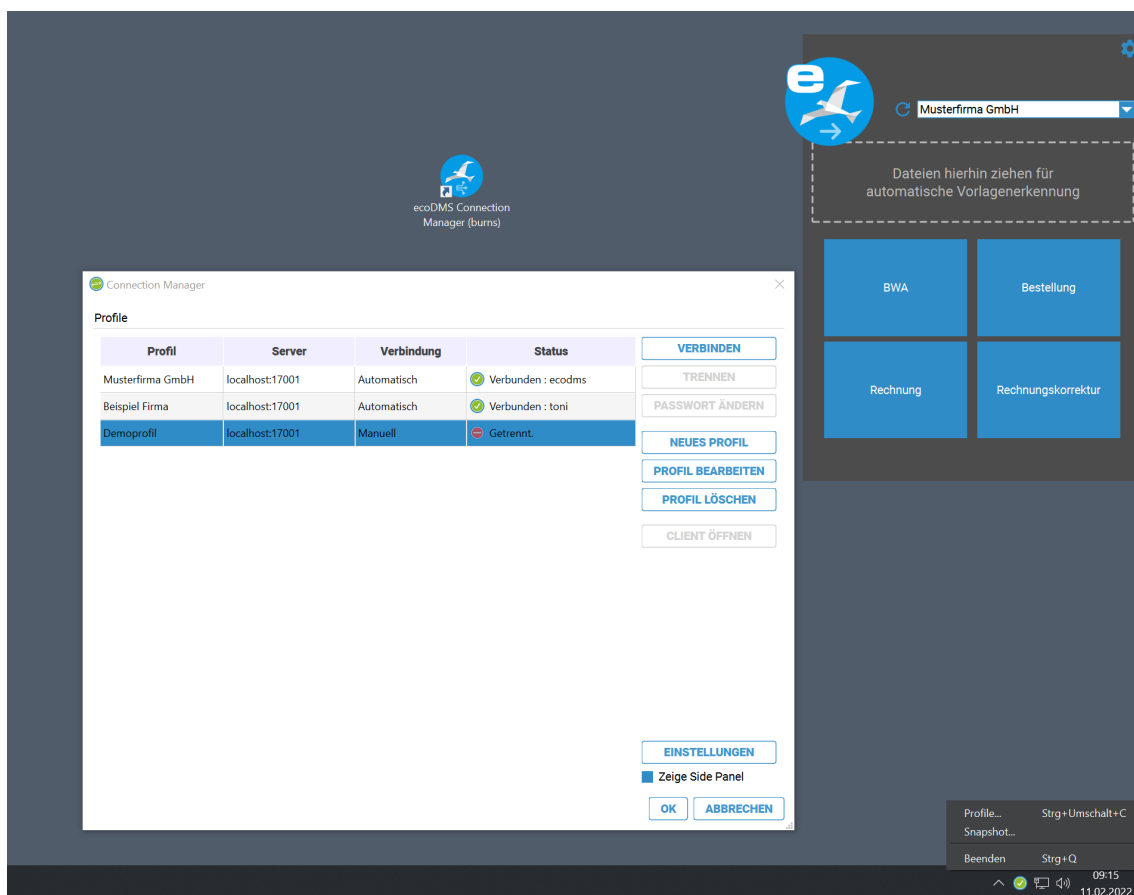
Figure 8.1: Connection Manager with enabled Side Panel

8.1 Enable / Disable Side Panel

Use the Connection Manager to activate the Side Panel in a workstation. Complete the following steps:

1. Open the Connection Manager at your workstation.

2. Enable the function "Show Side Panel".

3. The side panel is placed on the right of the screen after you have enabled it in the Connection Manager.
    a) You can hide or display it as required with a single click.
    b) To disable the side panel, deactivate the function.

8.2 Enable Classification Templates

If you want to classify documents during the archiving process, drag them onto an existing classification template in the side panel. The classification is automatically applied to the document. By default, the side panel displays all available classification templates. You can customise which templates to use for each seat.

1. On the top right of the side panel, click the "Settings" icon (gear)

2. Enable or disable the classification templates, as required
    a) All enabled templates are displayed in the side panel
    b) The other templates remain enabled, but are not available for selection in the side panel
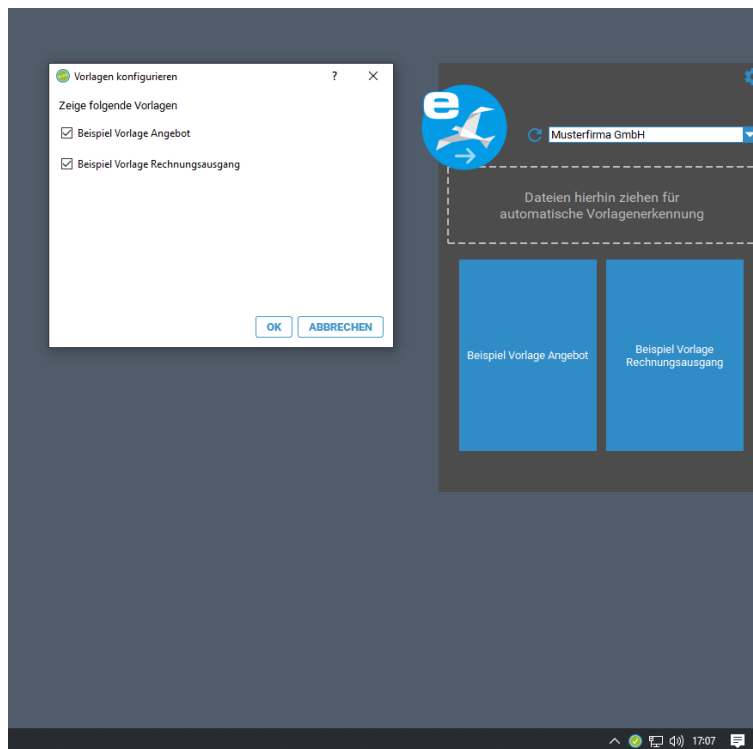
Figure 8.2: Side Panel - Settings - Configure Templates

8.3 Specify Target Profile

Depending on the setting, you can configure and link several profiles in the Connection Manager. Before you finally archive a document, make sure the correct profile is selected for archiving.

1. To do this, select the profile in the respective list in the side panel.
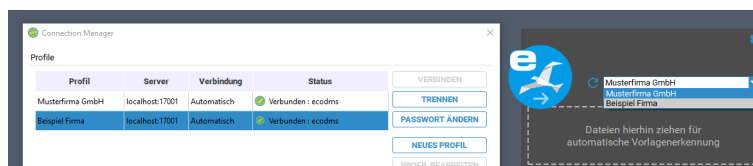
Figure 8.3: Side Panel - Select Target Profile

8.4 Automatic Archiving (Dark Process)

You can drag documents to a specific classification template in the Side Panel. The documents are then automatically archived without any need for action by the user. During classification ecoDMS fills in the recognised attributes according to the selected template.

1. Drag the document you want to archive onto the blue box of the required classification template in the side panel.

2. ecoDMS automatically classifies and archives the document in the background.

3. During the assignment process, all attributes that match the specifications in the classification template and/or can be assigned based on the template, are populated.

8.5 Automatic Pre-Classification (Classification dialog)

During archiving via the Side Panel, the matching classification template can also be determined by the system. Complete the following steps:

1. Drag the file you want to archive onto the area with a dashed frame "Drop files here

2. Then the Classification dialog opens.
   a) If one or more matching templates were found, the assignment of the recognised attributes will be carried out automatically.

3. Check the displayed classification.
   a) As an option you can make changes and/or remove the irrelevant tabs if one or more matching templates were found.

4. Complete the archiving process with "OK".
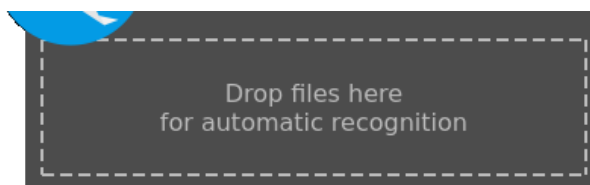
Figure 8.4: Side Panel - Automatic Classification Recognition

9 Inbox for Incoming Email Processing

The inbox displays documents after they have been scanned. You can also import documents manually to this area of the document management system. The inbox is for incoming email processing and is the preliminary step for the actual document archive. Here you can prepare the documents before they are finally archived.

Tips:

1. Ensure that the individual pages are lying the right way round. The text should always be readable from left to right. This is important for full-text indexing. If necessary, you can rotate the pages.

2. Choose the matching scan process: You can either scan documents via the ecoDMS scaninput folder or via a TWAIN/WIA/SANE interface. Alternatively, you can import documents manually.

3. The ecoDMS scaninput folder is the easiest option for scanning documents. You can use it when you have a network scanner or a USB scanner with the "Scan-to-Folder" feature.

4. If you want to use a TWAIN/WIA/SANE scanner, you must configure the scanner in ecoDMS. For more information, refer to the ecoDMS documentation.

5. The inbox provides several different editing functions. You can also copy, cut, and paste pages. Depending on the structure and type of a PDF file, the file can suppress these functions.

6. The archiving process saves the scanned documents to ecoDMS in the original format and also as searchable PDF/A-documents.

7. Scan the documents in the appropriate resolution: For archiving purposes we recommend scanning the documents with 200-300 DPI in black and white.

Figure 9.1: ecoDMS Inbox for Scanned Documents
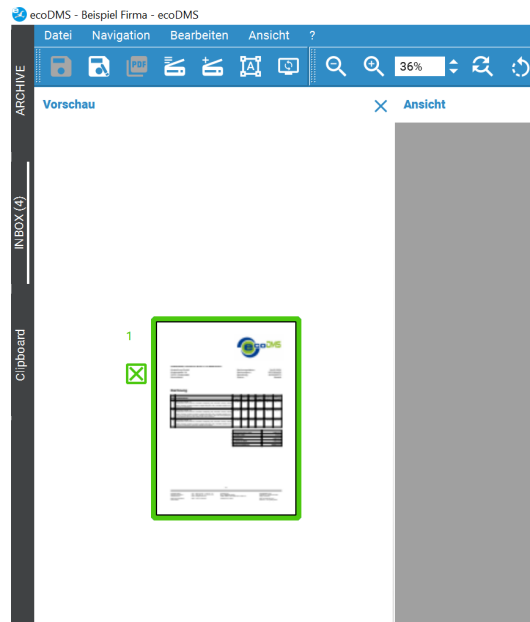
Figure 9.2: ecoDMS Client Tabs - Inbox

9.1 Separator Pages for the Scan Process

> **Notes:**
> - The document management system recognizes separator pages and empty pages and automatically hides them.
> - You can enable and disable this option via the ecoDMS interface (refer to 9.2.2).

Separator pages help you scan multiple documents in a batch scan. They indicate the beginning of a new document to ecoDMS. The system automatically splits the documents and reads them in separately.

1. ecoDMS has a PDF print template for separator pages. Duplex print this template.

   a) Make sure that the letter "T" is on the front and on the reverse side of a DIN-A4 sheet.

2. Insert a separator page at the end of a one or multiple page document. Then insert the next document behind the separator page.

3. Repeat this procedure until all documents in the batch have been scanned.

> **Advantages of a separator page:**
> - Automatic document separation: You no longer need to separate documents manually in ecoDMS.
> - A quicker scanning process: You can scan multiple documents in one process without having to feed each document separately into the scanner.
> - More clarity: The documents are saved to separate files during the archiving process, which improves the organization in ecoDMS.
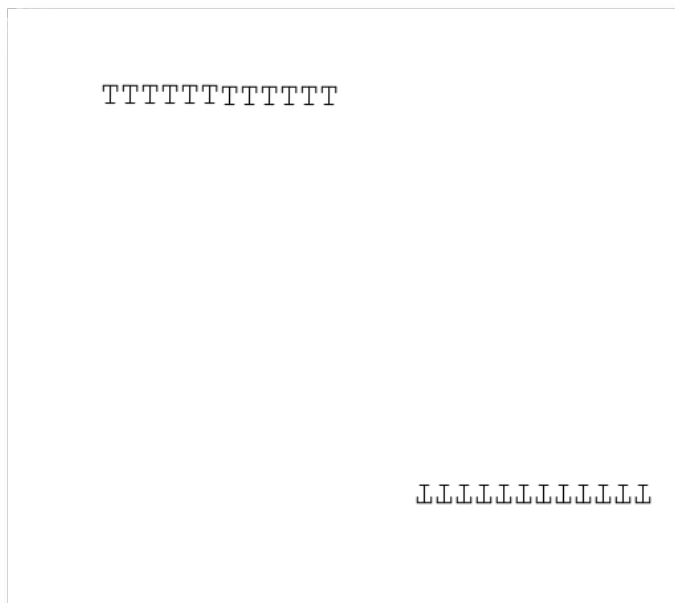
Figure 9.3: Separator Page

9.2 Scaninput: Management

> The scaninput folder of ecoDMS allows a server-side scanning process. This means you can, for example, send documents to this folder on the ecoDMS Server from a network-compatible scanner. The scaninput folder calls the scanned documents, splits them into individual files where it detects separators, and transfers them to the inbox in ecoDMS Client. If classification templates with automatic archiving are enabled, the recognized documents are transferred straight to ecoDMS for final archiving.

ecoDMS has a scaninput folder by default. If you have a full version, the ecoDMS administrator can add more folders if required.
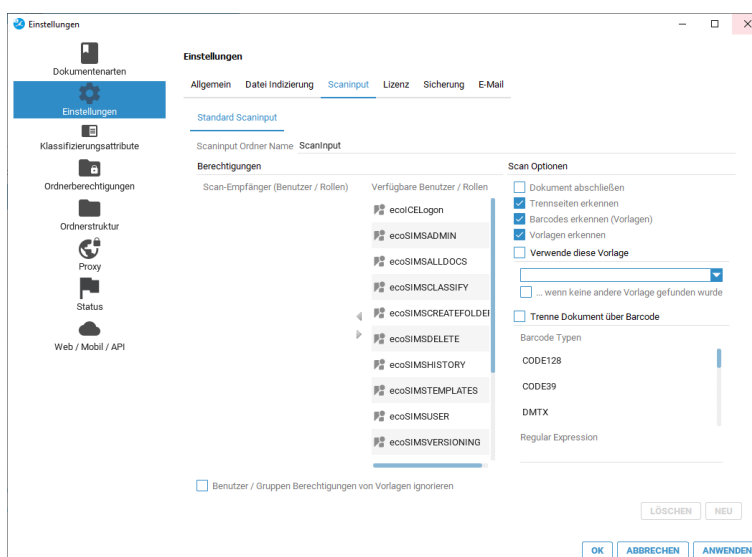
Figure 9.4: Settings - Settings - Scaninput (Here: Default Folder)

9.2.1 Create Scaninput Folder

The administrator can configure up to 20 more scaninput subfolders with different permissions and configurations in the settings dialog of ecoDMS. To create a new scaninput folder, complete the following steps:

1. Select the Settings - scaninput tab in the settings dialog.

2. Click "New".

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

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

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

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

6. You can create a total of 20 scaninput subfolders in this way.
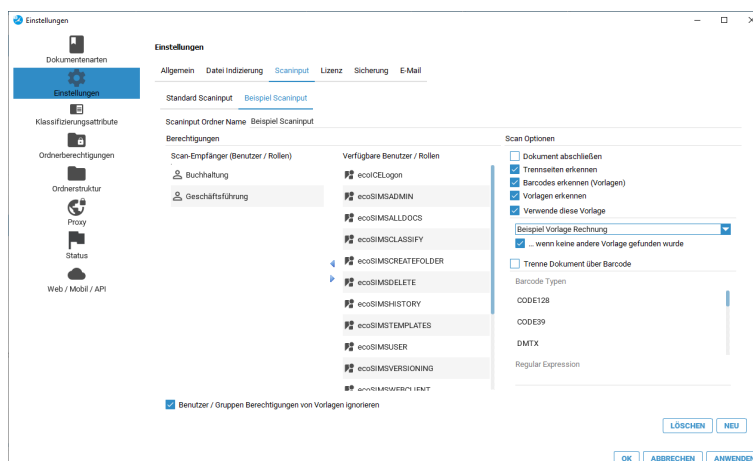
Figure 9.5: Settings - Settings - Create Scaninput
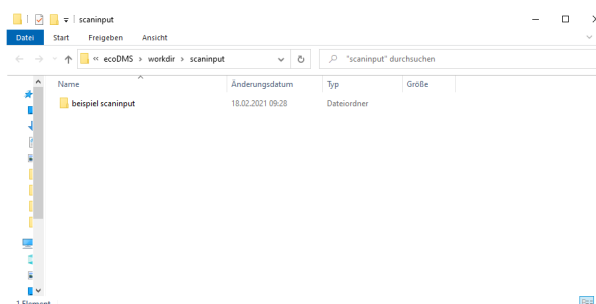
Figure 9.6: Dateisystem (ecoDMS Server): ecoDMS - workdir - scaninput

9.2.2 Scan Options

For each scaninput folder you can define different scan options:

9.2.2.1 Finalise Document

Per default, all documents archived through the scaninput folder are archived with the "Not Finalised" status. This means that you have the option to add further versions through version management in ecoDMS Client (not via inbox). To archive these documents as "Finalised", thus preventing the addition of further versions, you can select the "Finalise Document" function for the affected scaninput folder.

9.2.2.2 Recognise Templates

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

9.2.2.3 Use This Template

To assign the same classification to all documents that are archived through a scaninput folder, you can select a dedicated classification template. This is then automatically applied to all incoming documents via the scaninput folder. In this case other matching classification templates are ignored. The system exclusively uses the selected template for all incoming documents in this scaninput folder.

9.2.2.4 Recognise Separator Pages

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

9.2.2.5 Recognise Barcodes (Templates)

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

9.2.2.6 Separate Documents with Barcodes

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

1. Enable the function "Separate Documents with Barcodes".

    a) This automatically enables the prerequisite function "Recognise Separator Pages".

2. Select one or more barcode types that ecoDMS should recognise.

3. **Optional experts function:** As an option, you can further limit and describe the barcode by entering regular expressions. The following expressions serve as an example:

    a) Barcode starts with

    ```
    TEXT(.*)
    ```

    b) Barcode contains

    ```
    (.*)TEXT(.*)
    ```

    c) Barcode ends with

    ```
    (.*)TEXT
    ```

    d) Barcode starts with "VC", followed by 5 digits and ends with "-V01"

    ```
    VC[0-9]{5}\-V01
    ```

9.2.3 Permissions (Scan Recipients)

Each scaninput folder can be given a separate permission. The scanned documents are then visible for the stored scanning receiver only.

1. If the Scan Recipients window remains empty, the documents which were scanned via this folder are visible to all users in the Inbox.

2. If users and/or groups are dragged into the Scan Recipients field, the documents scanned via this folder automatically receive the permission stored there, and are thus only visible for these users.

   a) Exception: Users with the role "ecoSIMSALLDOCS". They can view all documents / folders independent of their permissions.

9.2.4 Ignore Users / Groups of Templates

Here you can specify how to handle permissions from classification templates (templates designer) if you set additional scaninput folder permissions.

1. **Function enabled:** If you enable this checkbox, documents are pre-classified as usual when ecoDMS recognises a classification template. However, the permission in a template is removed and replaced by the permission stored in the scaninput folder.

2. **Function disabled:** If you do not enable the "Ignore Users / Group Permissions from Templates" checkbox, the permissions stored in the template continue to apply when a classification template is recognised. If the "Classification Template" does not contain the user who scanned the document, the document is not visible to this user in the Inbox.

9.2.5 Assign Classification Template

You can save a classification template for each scaninput folder. The classification template loads by default as soon as a scanned document reaches the inbox via the scaninput folder.

9.2.6 Delete Scaninput Folder

Custom scaninput folders can also be deleted. In this case the folders are removed in the settings dialog. The Standard scaninput folder cannot be deleted. To delete, complete the following steps:

1. Select the tab "Settings - Scaninput" in the settings dialog.

2. Select the "scaninput folder" tab you want to delete.

3. Click the "Delete" button.

   a) The "scaninput folder" is now deleted in the settings dialog.

> For safety reasons, the folders remain in the file system. To delete the folders in the file system, the administrator merely needs to select the folder in the file system and remove it manually. **Before deleting, ensure that there are no documents in the "scaninput folder".**

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

9.3 Scaninput: Scan Documents

- The scaninput folder of ecoDMS allows a server-side scanning process. This means you can, for example, send documents to this folder on the ecoDMS Server from a network-compatible scanner. The scaninput folder calls the scanned documents, splits them into individual files where it detects separators, and transfers them to the inbox in ecoDMS Client. If classification templates with automatic archiving are enabled, the recognized documents are transferred straight to ecoDMS for final archiving.
- ecoDMS recommends the scaninput folder as the scanning method because only this method executes all server-side processes (including automatic template recognition).

9.3.1 Target Path for Scaninput Folders

In order to access this folder, the permissions must be adjusted accordingly. The scaninput folder is stored at the specified data path that was chosen during the installation of ecoDMS Server:

1. Under Ubuntu/Debian it is always at:

```
/opt/ecodms/workdir/scaninput
```

2. Standard Windows:

```
\%ProgramData%\ecodms\workdir\scaninput
```

If you have created custom scaninput folders, they are subfolders in the respective data path.

9.3.2 Scan Process

1. In your scanner, setup the destination path for the scaninput folder to which you want to scan the documents.

2. Scan you documents to the "Scaninput Folder".

3. ecoDMS receives the documents from the scaninput folder after just a few seconds.
   a) This is the reason why the documents are displayed in the folder just for a few seconds.
   b) It can take a few minutes to retrieve the documents, depending on the file size.

9.3.3 Manual Access

Completed TIFFs or PDFs can also be stored manually in the folder.

1. Access from your workstation to the desired scaninput folder. To do this, use the address of the destination path.

2. Insert the PDF and / or TIFF files in the scaninput folder.

3. The client receives the documents after just a few seconds from the scaninput folder.
   a) This is the reason why the documents are displayed in the folder just for a few seconds.
   b) Depending on the file size, it can take a few minutes to request the documents via the client.

9.4 TWAIN/WIA/SANE: Scan Documents

You can scan documents straight to the ecoDMS inbox via a TWAIN/WIA/SANE interface.

– The TWAIN/WIA/SANE interface is compatible with many but not all scanner models.
– If you scan via TWAIN/WIA/SANE interface, the pre-classification is only possible via the function "Search Matching Classification Template".
– You can only scan TIFF files with this interface.
– The Scaninput folder is recommended as the scanning method because only with this method all processes on the server (including automatic template recognition) can be carried out.
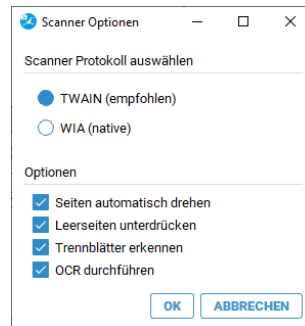
Figure 9.7: ecoDMS Inbox: TWAIN/WIA/SANE Interface Options

9.4.1 Select Scanner

To use the interface, you have to select a scanner. Complete the following steps:

1. Click the menu "File - Scan - Select Scanner"
   a) The Select Scanner dialog opens.

2. Choose from the list of available scanners the required device.

3. Confirm this process with "OK" or cancel it with "Cancel".

9.4.2 Configure Scanner

After you have chosen a scanner, you have to configure it. Complete the following steps:

1. Click the menu "File - Scan - Settings"
   a) The "Scanner Options" dialog opens.

2. Select the matching scanner log according to the operating system and the scanner.
   a) TWAIN
      i. WIA
      ii. SANE
      iii. ...

3. Enable the required functions for the scan process in the "Options".
   a) **Rotate pages automatically**
      i. The system automatically rotates pages that were scanned in upside down. Enable this function for the rotation process.
   b) **Suppress empty pages**
      i. The system can automatically detect and remove empty pages. Enable this function for the rotation process.
   c) **Detect separator pages**

      i. To scan in several documents simultaneously, we recommend you use the official ecoDMS separator pages for document separation. The software splits the documents automatically into individual files. Enable this function to detect the separator pages.

  d) **Execute OCR**

      i. OCR recognition converts the scanned TIFF file into a searchable PDF.

4. Confirm your configuration with "OK" or cancel it with "Cancel".
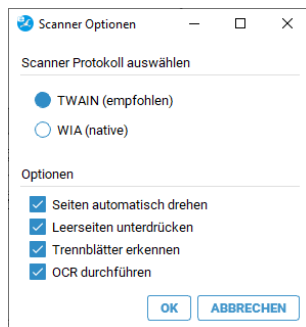
Figure 9.8: ecoDMS Inbox: TWAIN/WIA/SANE Interface Options

9.4.3 Scan New Document

To scan a completely new document, complete the following steps:

1. Select the function "Scan New Document" with one of the following options:

  a) Click the menu "File - Scan - Scan New Document" **or**

  b) Click the toolbar icon "Scan New Document" **or**

  c) Enter this shortcut: F10

2. If several scanners are connected, you must select a source in the next step.

  a) If only one scanner is connected, the respective scanner window opens. The window is different for different scanners.

3. Start scanning process.

4. The scanned pages are loaded as a new document in the last position in the Inbox.

Figure 9.9: Icon - Scan New Document

9.4.4 Add Pages to Document

To scan a completely new document, complete the following steps:

1. Call up the document in the client.

2. Select the function "Add Pages to Document" with one of the following options:

  a) Click the menu "File - Scan - Scan New Document" **or**

  b) Click the toolbar icon "Scan New Document" **or**

  c) Enter this shortcut: F10

3. If several scanners are connected, you must select a source in the next step.

    a) If only one scanner is connected, the respective scanner window opens. The window is different for different scanners.

4. Start scanning process.

5. The scanned pages will be added to the existing document.

Figure 9.10: Icon - Add Page(s) to Document

9.5 Request Scans

After scanning, the scanned documents are retrieved via the Inbox and prepared for archiving. When starting the programme, the available documents are loaded automatically one after the other. While working with the Inbox, the user can also request the documents manually. To display the scanned documents in ecoDMS, they must first be classified and archived through the Inbox.

To view and update the documents and classifications manually in the Inbox, you have the followings options:

1. To do this, click the icon "Request Documents (F5)" on the toolbar **or**

2. Enter this shortcut: F5 **or**

3. When the Inbox restarts, it automatically retrieves and updates the documents and classifications.

Figure 9.11: Icon - Request Documents

9.6 Display Overview of All Scans

The "Inbox Overview" window offers an overview of all documents available to the user in the inbox. Scanned documents are displayed as a preview. Apart from the document preview, the overview displays the number of pages in a file. There is also an option to remove documents that are not required. This is possible because the inbox is not the final archive but a preliminary step.

1. Click the Overview icon on the toolbar to open the preview of all available documents in the inbox.

Figure 9.12: Display Overview of All Scans (Icon)

2. Click the icon to open an overview of all documents in the inbox that are available for this user.
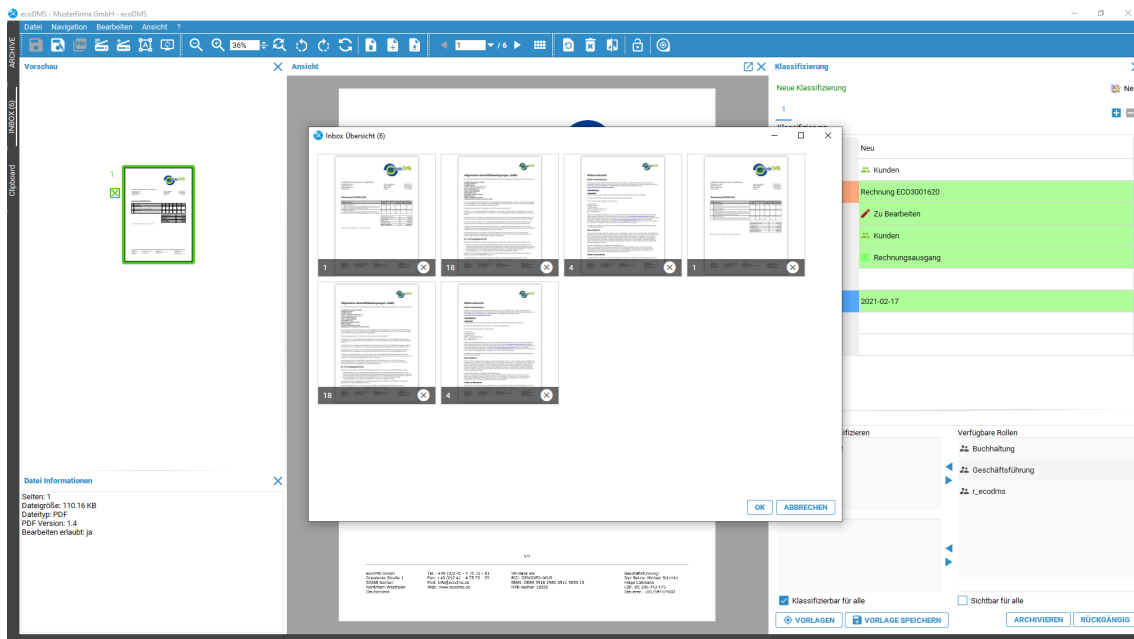
Figure 9.13: Übersicht aller eingescannten Dokumente in der Inbox

9.6.1 Delete Documents

Documents that are not required can be removed from the inbox and deleted irrevocably. This is possible because the inbox is not the final archive but a preliminary step. You cannot undo this operation. To restore deleted documents, you must scan them again and retrieve them through the inbox. This is how to delete a document from the inbox via the overview:

1. Click the X icon below the document you want to delete.

2. Confirm the confirmation prompt with "Yes" or abort the deletion process with "No".

9.7 Classification

Via Classification you can assign, for example, the virtual destination folder in ecoDMS, the document type, the status, the responsibilities and many more archiving details to each file you archive. These details allow documents to be systematically filed and easily retrieved through keyword search as an alternative and/or in addition to the full-text search.

- Die Inbox von ecoDMS verfügt über einen eigenen Klassifizierungsdialog, so dass die eingescannten Dokumente direkt in der Inbox (automatisch via Vorlagen Designer oder manuell durch den Benutzer) klassifiziert werden können.
- Die Klassifizierung im Allgemeinen ist detailliert im Kapitel "Klassifizierung" in diesem Handbuch beschrieben.

9.7.1 Copy & Paste Content & Barcodes

You can select document content or a barcode from the document, and copy it for the classification. To do so, complete the following steps:

1. In the Classification dialog, select the input or date field to which you want to copy the contents or the barcode information.

2. The following options are available for copying content:

a) Overwrite existing text in the attribute of a free text field (for example, comment):
Press the CTRL key and Right-click an area to select it in the scanned document.

b) Add texts to an existing text in the attribute of a free text field (for example, comment):
Press the CTRL key and the Shift key and Right-click an area to select it in the scanned document.

c) Barcode in a document can be decoded and entered as text:
To decode barcodes in a document, press and hold the CTRL + Alt keys and select the area while pressing the right mouse button.
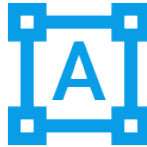
Figure 9.14: Icon - Copy Text from Document
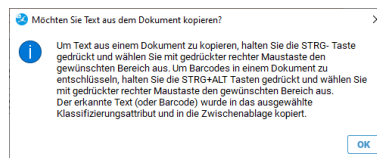
Figure 9.15: Explanation: Copy Text from Document

9.7.1.1 Date Formats

ecoDMS recognises the following date formats:

1. yyyy.MM.dd

2. dd.MM.yyyy

3. dd.MM.yy

4. dd. MMM yyyy

5. dd. MMMM yyyy

6. dd MM yyyy

7. dd MMMM yyyy

8. dd.MMyyyy

9. ddMMyyyy

10. ddMM.yyyy

9.7.2 Default Classification (For User Workstation)

To classify scanned documents, you can define a default classification on your workstation. This is loaded per default when a document is scanned in and retrieved with the Inbox at your workstation.

- The default classification is loaded exclusively in the Inbox at your workstation if no other classification template is recognised.
- If you select the "Reset Classification" function in the Classification dialog, the default classification will not be loaded again for the next documents.
- Please note that these setting refer to the individual workstation and is not stored in the user profile.
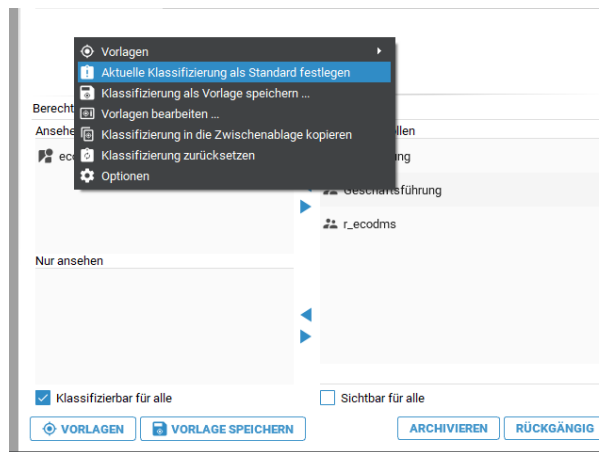
Figure 9.16: Set Default Classification in Inbox

9.7.2.1 Create Default Classification

To create a default classification for your workstation, complete the following steps:

1. In the Inbox Classification dialog, specify the classification information and/or the permissions which you want to store as the default settings.

2. Right-click the "Permissions" window.

3. Click "Specify current classification as default".

9.7.2.2 Delete Default Classification

If you defined a default classification at your workstation, you can delete it again if necessary. For future classifications, the default classification will no longer be loaded in the Inbox. To delete a default classification at your workstation, complete the following steps:

1. In the Classification dialog, go to any document in the Inbox with the mouse.

2. Right-click the "Permissions" window.

3. Click "Reset Classification".

9.7.3 Search Classification Templates

In the inbox you can either classify manually via the Classification dialog or automatically via a classification template. If required, you can manually search and load a matching classification template. To do this, you have the following options:

– Click the icon "Search Matching Classification Template" in the toolbar of the inbox.

– Press the "F4" function key on your keyboard.

In both cases the system searches for a matching classification template and populates the attributes accordingly.

Figure 9.17: Search Classification Template in the Inbox (Icon)

9.8 Archive Scanned Documents

To archive the scanned documents via the Inbox, complete the following steps:

1. Click the button "Archive" in the Classification dialog.

> – This process cannot be undone.
> – Later changes to the document are now no longer possible because of audit-proof.

2. The documents are archived as "Finalised" files. You can add any versions.

> – After the archiving process, the scanned PDF or TIFF files are automatically converted into the (readable) PDF/A format.
> – The quality and size of the file determine the conversion time and the feasibility.
> – After successful conversion, the PDF/A can be opened in ecoDMS Client. Until then the original file remains.
> – You can open the PDF/A via the table. You can retrieve the original files via the version management function.
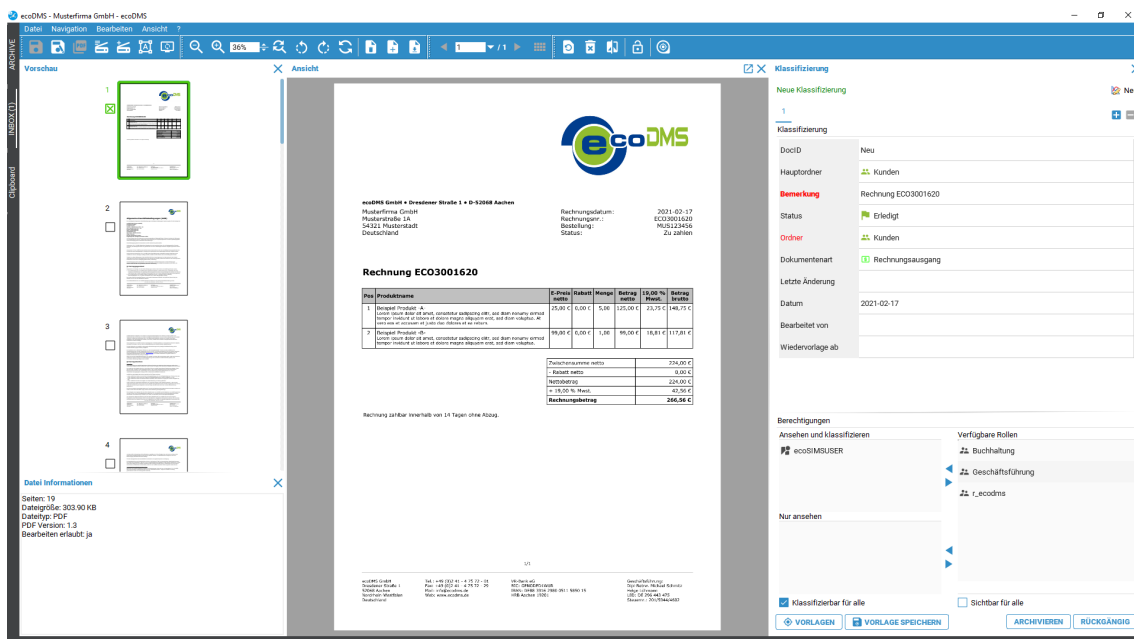
Figure 9.18: Classification & Archiving via Inbox

9.9 Display Statistics

> This function is exclusively available to ecoDMS administrators.

The statistics document and display the processes of a scanned document in a flow chart. Using the statistics, you can trace each step of the route a document takes from scanning to archiving. The documents are displayed in the statistics until they are archived. To open the statistics, complete the following steps:

1. In the menu bar, click "Edit - Display Statistics".

2. The Statistics dialog opens.

- **Process list:** In this area, select the document whose processes you want to view.
- **Reload Process List:** Clicking this button refreshes all available processes.
- **Reload View Clicking:** this button refreshes the view for the selected process.
- **Reload View Automatically:** Enabling this function automatically refreshes the progress of the respective document processes.

Figure 9.19: Statistics
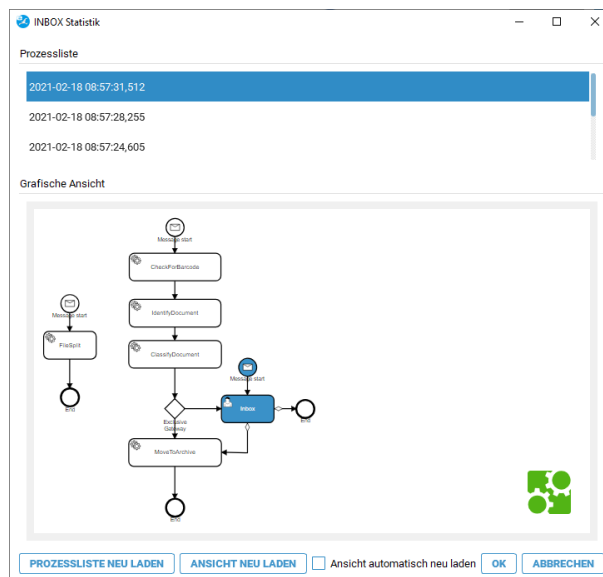
Figure 9.20: Inbox - Statistics (Example)

9.10 Next Document

The documents are loaded and displayed one after the other in this application. You can switch between the documents. To skip to the next document, you have the following options:

1. Click the toolbar icon "Next Document" **or**

2. Click the menu "Navigation - Next Document" **or**

3. Enter this shortcut: CTRL + Arrow right

Figure 9.21: Icon - Next Document

9.11 Previous Document

The documents are loaded and displayed one after the other in this application. You can switch between the documents. To skip to the next document, you have the following options:

1. Click the toolbar icon "Previous Document" **or**

2. Click the menu "Navigation - Previous Document" **or**

3. Enter this shortcut: CTRL + Arrow left

Figure 9.22: Icon - Previous Document

9.12 Import Documents

TIFF and PDF files can be imported into the Inbox.

9.12.1 Import Documents (Drag & Drop)

Use this function to drag and drop TIFF or PDF files from the file system into the Inbox.

- Please note that in this case the separator function and the automatic template recognition do not work.

- Template recognition can, however, be performed manually after loading via the function "Search matching classification templates" in the toolbar.

To import via drag and drop, complete the following steps:

1. Select the documents you want to import from your file system.

2. Drag the selected documents via drag and drop into the user interface of the scan programme.
   a) The import process may take a while depending on the file size.

3. The documents are displayed as individual files in the scan programme and can be processed consecutively.

9.12.2 Import Documents (Menu)

Use this function to drag and drop TIFF or PDF files from the file system into the Inbox.

- Please note that in this case the separator function and the automatic template recognition do not work.

- Template recognition can, however, be performed manually after loading via the function "Search matching classification templates" in the toolbar.

To import, complete the following steps:

1. Select the "Import" function. To do this, you have the following options:

    a) Click "File - Import" in the menu or

    b) Enter this key command: CTRL+I

2. A dialog opens.

    a) Select the TIFF or PDF file on your file system.

    b) Then confirm your selection with "Open".

    c) The document is now loaded into the client.

Figure 9.23: Icon - Import Documents

9.13 Select / Highlight Multiple Pages

In a multi-page document, you can highlight multiple pages on which you want to execute inbox operations (such as deleting pages, moving pages, etc.).

1. You can select multiple pages using the CTRL key.

2. Once you have selected a page, the checkbox to the left of the page is enabled and the page is highlighted in blue.

3. The last page you select is highlighted in green.

9.14 Split Document in Two

– When you split a document in two or into separate pages, ecoDMS applies the classification of the original document. You can modify this if necessary.
– There are several ways to split a document:
    – Separate Documents with Barcode
    – Separate Documents with Separator Page
    – Split Documents Inside the Inbox

With this function you can insert pages from a PDF or TIFF document separately or as a document.

1. Select the pages you want to split in the "Thumbnails". (Press and hold the "CTRL" key to select several documents).

2. Use the function "Split Document". To use the function, there are several options:

    a) Click the toolbar icon "Split Document" **or**

    b) Enter this shortcut: F7

3. The dialog shows the modified current document and the new document.

4. Confirm the process with "OK" or cancel it with "Cancel".

5. The divided pages are inserted in the last position in the client.

6. In order to classify and archive a document, save the changes first.

a) Click the save icon.

Figure 9.24: Icon - Split Document
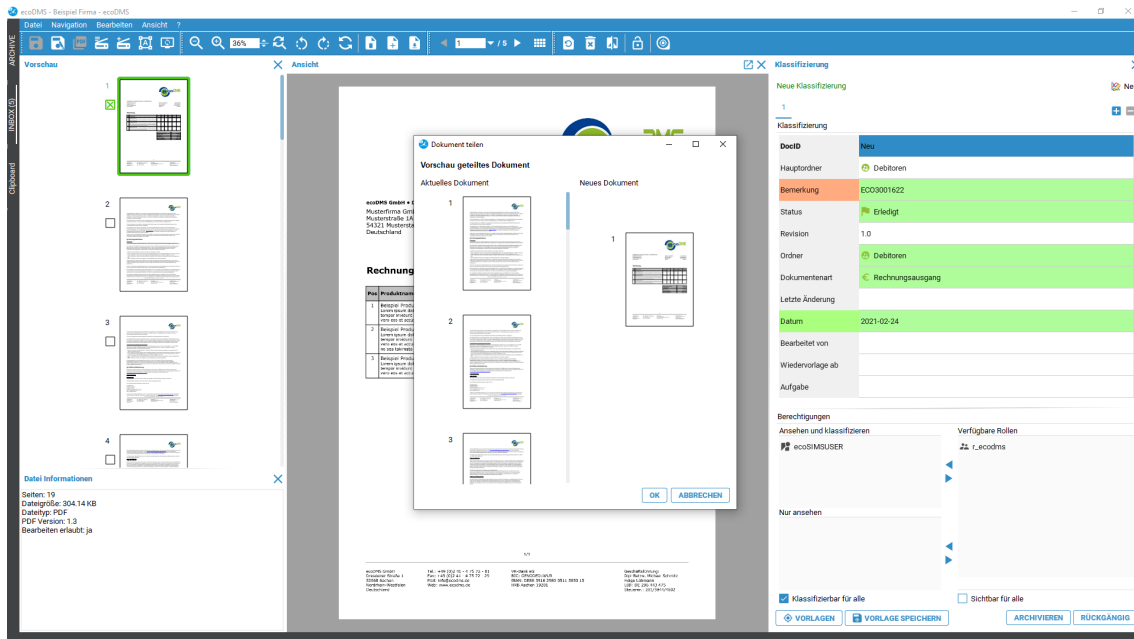
Figure 9.25: Inbox - Split Document

9.15 Split Document into Separate Pages

> When you split a document in two or into separate pages, ecoDMS applies the classification of the original document. You can modify this if necessary.

To split multi-page documents into single pages and archive them in sequence to the document management system, use the "Split into single pages" feature.

1. Open a multi-page PDF in the inbox

2. Click the "Split into single pages" icon

3. Confirm the message "Do you want to split file into single pages?" with "Yes".

4. The file is separated and the pages are saved to the inbox as separate documents.

Figure 9.26: Icon - Split into Single Pages

9.16 Invert Page Order

Use this feature to invert the page order in a document. If you scan a document with the last page first, you can use it to correct the order.

1. Open a multi-page PDF in the inbox

2. Execute the "Invert Page Order" feature using one of the following options:
    a) Icon - Invert Page Order
    b) Menu - Edit - Invert Page Order
    c) Right-click a page - Invert Page order
    d) Keyboard shortcut: CTRL+Alt+N

3. Speichern Sie die Änderung ab

Figure 9.27: Icon - Invert Page Order

9.17 Move One or Multiple Pages

In a multi-page PDF, you can select one or multiple pages and move them to another position.

1. Press CTRL and select the pages you want to move.

2. Move the selection to another position.
    a) If, for example, you select pages 6, 10, and 20 and pull them to page 1, this is the new order: 1, 6, 10, 20, 2, 3, 4, 5, 7, ...

9.18 Unlock Documents

This function is exclusively available to ecoDMS administrators.

You can only edit and classify documents if the server connection is stable and the documents are not checked out by another user. Otherwise the documents are locked in the inbox. If required, the administrator can unlock the documents. If the document is checked out by another user, ecoDMS displays the name of this user above the document preview in the inbox. Documents should only be unlocked following prior consultation. To unlock a document, complete the following steps:

1. Select the document.

2. Click the "Unlock Document" icon on the toolbar.

Figure 9.28: Icon - Unlock Document
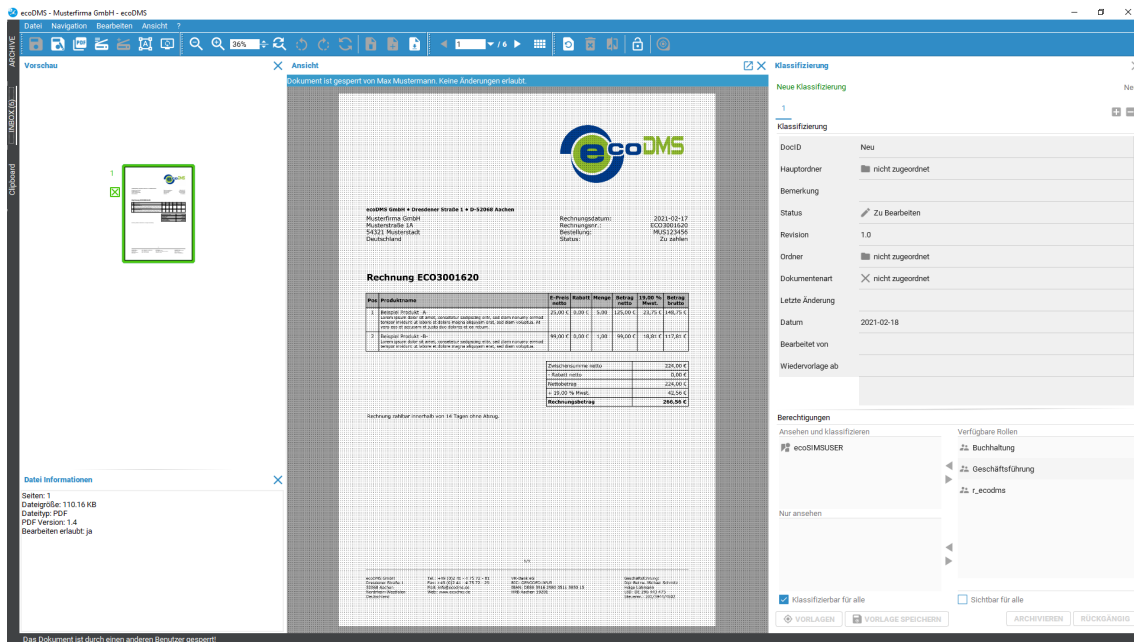
Figure 9.29: Document Locked By Another User (Inbox)

9.19 Edit Documents

You can use various functions to edit the documents requested via this application before they are archived.

9.19.1 Copy, Cut and Paste Pages

The Inbox provides several different editing functions. You can copy, cut and paste pages. Depending on the structure and type of a PDF file, the file can suppress these functions.

9.19.1.1 Cut

If a document includes multiple pages, selected pages can be cut and pasted in another position or document. To do so, complete the following steps:

1. Select the pages you want to cut in the "Thumbnails". (Press and hold the "CTRL" key to select several documents).

2. Use the function "Cut". To use the function, there are several options:

   a) Click the menu "Edit - Cut" **or**

   b) Right-click a selected page - "Cut" **or**

   c) Enter this shortcut: CTRL + X

3. The selection is cut and copied to the clipboard.

4. In order to classify and archive a document, save the changes first.

   a) Click the Save icon.

Figure 9.30: Icon - Cut

9.19.1.2 Paste

Pages that are cut and copied are automatically copied to the clipboard and can be inserted anywhere in this application.

1. Select the pages you want to cut in the "Thumbnails". (Press and hold the "CTRL" key to select several documents).

2. Use the function "Paste". To use the function, there are several options:
   a) Click the menu "Edit - Paste" **or**
   b) Right-click a selected page - "Paste" **or**
   c) Enter this shortcut: CTRL + V

3. The selection is pasted to the document.

4. In order to classify and archive a document, save the changes first.
   a) Click the save icon.

Figure 9.31: Icon - Paste

9.19.1.3 Copy

Pages that are copied are automatically copied to the clipboard and can be inserted anywhere in this application.

1. Select the pages you want to copy in the "Thumbnails". (Press and hold the "CTRL" key to select several documents).

2. Use the function "Copy". To use the function, there are several options:
   a) Click the menu "Edit - Copy" **or**
   b) Right-click a selected page - "Copy" **or**
   c) Enter this shortcut: CTRL + C

3. The selection is copied to the clipboard.

4. In order to classify and archive a document, save the changes first.
   a) Click the save icon.

Figure 9.32: Icon - Copy

9.19.2 Rotate Pages

If necessary, you can rotate the pages of a document.

9.19.2.1 Rotate Left

Use this tool to rotate selected page(s) 90 degrees to the left.

1. Select the pages you want to rotate in the "Thumbnails". (Press and hold the "CTRL" key to select several documents).

2. Use the function "Rotate Left". To use the function, there are several options:
   a) Click the menu "View - Rotate Left" **or**
   b) Right-click a selected page - "Rotate Left" **or**
   c) Click the toolbar icon "Rotate Left" **or**
   d) Enter this shortcut: CTRL + Shift + L

3. In order to classify and archive a document, save the changes first.
   a) Click the save icon.

Figure 9.33: Icon - Rotate Left

9.19.2.2 Rotate Right

Use this tool to rotate selected page(s) 90 degrees to the right.

1. Select the pages you want to rotate in the "Thumbnails". (Press and hold the "CTRL" key to select several documents).

2. Use the function "Rotate Right". To use the function, there are several options:
   a) Click the menu "View - Rotate Right" **or**
   b) Right-click a selected page - "Rotate Right" **or**
   c) Click the toolbar icon "Rotate Right" **or**
   d) Enter this shortcut: CTRL + Shift + R

3. In order to classify and archive a document, save the changes first.
   a) Click the save icon.

Figure 9.34: Icon - Rotate Right

9.19.2.3 Rotate 180 Degrees

Use this tool to rotate selected page(s) by 180 degrees.

1. Select the pages you want to rotate in the "Thumbnails". (Press and hold the "CTRL" key to select several documents).

2. Use the function "Rotate 180 degrees". To use the function, there are several options:
   a) Click the menu "View - Rotate 180 degrees" **or**
   b) Right-click a selected page - "Rotate 180 degrees" **or**
   c) Click the toolbar icon "Rotate 180 degrees" **or**

d) Enter this shortcut: CTRL + R

3. In order to classify and archive a document, save the changes first.

    a) Click the save icon.

Figure 9.35: Icon - Rotate 180 degrees

9.19.3 Export Pages

You can export selected pages of a TIFF document and save them in a file.

1. Select the pages you want to export in the "Thumbnails". (Press and hold the "CTRL" key to select several documents).

2. Use the function "Export Selected Page(s)". To use the function, there are several options:

    a) Click the menu "Edit - Export Selected Page(s)" **or**

    b) Right-click a selected page - "Export Selected Page(s)" **or**

    c) Click the toolbar icon "Export Selected Page(s)" **or**

    d) Enter this shortcut: CTRL + E

3. Select the path and enter a file name.

4. Confirm your entry with "Save" or cancel the process with "Cancel".

Figure 9.36: Icon - Export Selected Page(s)

9.19.4 Add Pages

You can add more pages to existing TIFF files [1].

1. Select the document.

2. Use the function "Add Page(s)". To use the function, there are several options:

    a) Click the menu "Edit - Add Page(s)" **or**

    b) Right-click a selected page - "Add Page(s)" **or**

    c) Click the toolbar icon "Add Page(s)" **or**

    d) Enter this shortcut: Ins

3. Select the path and choose the file.

4. Confirm your selection with "Open" or cancel the process with "Cancel".

5. In order to classify and archive a document, save the changes first.

    a) Click the save icon.

Figure 9.37: Icon - Add Selected Page(s)

9.19.5 Delete Pages

You can delete selected pages.

1. Select the pages you want to delete in the "Thumbnails". (Press and hold the "CTRL" key to select several documents).

2. Use the function "Delete Selected Page(s)". To use the function, there are several options:

   a) Click the menu "Edit - Delete Selected Page(s)" **or**

   b) Right-click a selected page - "Delete Selected Page(s)" **or**

   c) Click the toolbar icon "Delete Selected Page(s)" **or**

   d) Enter this shortcut: Del

3. Confirm the message with "Yes" or cancel the process with "No".

4. In order to classify and archive a document, save the changes first.

   a) Click the save icon.

Figure 9.38: Icon - Delete Selected Page(s)

9.19.6 Move Pages

You can change the order of pages within a document. To move page(s), complete the following steps:

1. Select the pages you want to move in the "Thumbnails". (Press and hold the "CTRL" key to select several documents).

2. Move the page(s) by dragging them to the new position.

3. In order to classify and archive a document, save the changes first.

   a) Click the save icon.

9.19.7 Swap Pages

You can change the order of pages within a document. To swap the position of page(s), complete the following steps:

1. Select the pages you want to swap in the "Thumbnails". (Press and hold the "CTRL" key to select several documents).

2. Move the page onto another page.

3. When the two pages touch, two arrows appear which signal and execute the swap.

4. In order to classify and archive a document, save the changes first.

   a) Click the save icon.

9.19.8 Zoom Pages / View

The software includes various zoom functions for page display.

9.19.8.1 Zoom Out

The software includes various zoom functions for page display. To zoom out, complete the following steps:

1. Select the page which you want to view in the "Thumbnails".

2. Use the function "Zoom Out". To use the function, there are several options:

    a) Click the menu "View - Zoom Out" **or**

    b) Click the toolbar icon "Zoom Out" **or**

    c) Enter a percentage value for the view in the spinbox **or**

    d) Click the bottom arrow in spinbox **or**

    e) Enter this shortcut: Alt + -

Figure 9.39: Icon - Zoom Out

9.19.8.2 Zoom In

The software includes various zoom functions for page display. To zoom in, complete the following steps:

1. Select the page which you want to view in the "Thumbnails".

2. Use the function "Zoom In". To use the function, there are several options:

    a) Click the menu "View - Zoom In" **or**

    b) Click the toolbar icon "Zoom In" **or**

    c) Enter a percentage value for the view in the spinbox **or**

    d) Click the top arrow in spinbox **or**

    e) Press the right mouse button and select the area which you want to zoom in in the "view" window **or**

    f) Enter this shortcut: Alt + +

Figure 9.40: Icon - Zoom In

9.19.8.3 Fit

The software includes various zoom functions for the display of pages. To fit in, complete the following steps:

1. Select the page which you want to view in the "Thumbnails".

2. Use the function "Fit". To use the function, there are several options:

    a) Click the menu "View - Fit" **or**

    b) Click the toolbar icon "Fit" **or**

c) Double click on the page in the "View" window **or**

d) Enter this shortcut: Strg + Z

Figure 9.41: Icon - Fit

9.19.9 Select Pages

You have various options to select or mark the pages of a document.

9.19.9.1 Select All Pages

This function selects all pages of the displayed document simultaneously.

1. Click into the "View".

2. Use the function "Select All Pages". To use the function, there are several options:
    a) Click the menu "Edit - Select All Pages" **or**
    b) Right click on a page - "Select All Pages" **or**
    c) Enter this shortcut: CTRL + Alt + A

9.19.9.2 Select Even Pages

With this function you can select all pages with even numbers in a document.

1. Click into the "View".

2. Use the function "Select All Pages". To use the function, there are several options:
    a) Click the menu "Edit - Select Even Pages" **or**
    b) Right click on a page - "Select Even Pages" **or**
    c) Enter this shortcut: CTRL + Alt + G

9.19.9.3 Select Odd Pages

With this function you can select all pages with odd numbers in a document.

1. Click into the "View".

2. Use the function "Select Odd Pages". To use the function, there are several options:
    a) Click the menu "Edit - Select Odd Pages" **or**
    b) Right click on a page - "Select Odd Pages" **or**
    c) Enter this shortcut: CTRL + Alt + U

9.19.9.4 Undo Selection

This function can undo the selection of pages in a document.

1. Click into the "View".

2. Use the function "Undo Selection". To use the function, there are several options:
    a) Click the menu "Edit - Undo Selection" **or**
    b) Right click on a page - "Undo Selections" **or**
    c) Enter this shortcut: CTRL + Shift + A

9.19.9.5 Reverse Selection

All pages are marked, except the one(s) you have already selected.

1. Click into the "View".

2. Use the function "Reverse Selection". To use the function, there are several options:

   a) Click the menu "Edit - Reverse Selection" **or**

   b) Right click on a page - "Reverse Selections" **or**

   c) Enter this shortcut: CTRL + Shift + U

9.19.9.6 Next Page

With this function the next page of the current document is displayed in the "View" window.

1. Click into the "View".

2. Use the function "Next Page". To use the function, there are several options:

   a) Click the menu "Navigation - Next Page" **or**

   b) Right click on a page - "Next Page" **or**

   c) Enter this shortcut: CTRL + Shift + Arrow down

9.19.9.7 Previous Page

With this function the previous page of the current document is displayed in the "View" window.

1. Click into the "View".

2. Use the function "Next Page". To use the function, there are several options:

   a) Click the menu "Navigation - Next Page" **or**

   b) Right click on a page - "Next Page" **or**

   c) Enter this shortcut: CTRL + Shift + Arrow down

9.20 Close Documents

You can close documents.

 – Closed documents are not removed from the server.

 – Every time the programme launches, all available, scanned documents are automatically retrieved.

 – With a click on the icon "Request Documents" all available, scanned documents are automatically reloaded.

You have various options for closing a document.

1. Use the function "Close". To use the function, there are several options:

   a) Click the menu "File - Close" **or**

   b) Enter this shortcut: CTRL + Alt + C

9.20.1 Close All Documents

If you do not want to exit the application but want to close all opened documents, you have the following options:

 – Closed documents are not removed from the server.

 – Every time the programme launches, all available, scanned documents are automatically retrieved.

 – With a click on the icon "Request Documents" all available, scanned documents are automatically reloaded.

1. Use the function "Close". To use the function, there are several options:

   a) Click the menu "File - Close All" **or**

   b) Enter this shortcut: CTRL + Shift + C

9.21 Delete Documents

When the documents are displayed in this scan programme, they have not yet been stored in ecoDMS. Therefore, documents that are not required can be deleted again after scanning. You cannot undo this operation.

9.21.1 Delete Document (Overview)

For more information, please refer to the section "Display Overview of All Scans".

9.21.2 Delete Document (User)

Documents that should not be archived can be removed from the server. To do so, complete the following steps:

1. Select the document.
    a) Click the icon "Delete Document from Server" on the toolbar or
    b) Press "F8" on your keyboard.

2. The system will ask you to confirm the delete process.
    a) The document is deleted irrevocably if you confirm the process with "Yes".
    b) Click "No" to abort the process.

Figure 9.42: Icon - Delete Document from Server

9.21.3 Delete All Documents (Admin)

> For security reasons, this function is only available to users who have been assigned the system roles "ecoSIMSAdmin", "ecoSIM-SCLASSIFY" and "ecoSIMSALLDOCS". Otherwise the function is not visible.

To remove all documents from the scan programme, you require special system permissions in addition to the standard permissions. To delete all documents, complete the following steps:

1. Select "Edit -> Delete All Documents..." from the menu.

2. The system will ask you to confirm the delete process.
    a) All available documents in the scan programme are deleted irrevocably if you confirm the process with "Yes".
    b) Click "No" to abort the process.

9.22 Storage Functions

There are various functions for saving documents and/or changes. By default, this part of the application is provided for archiving of scanned documents. In addition to the archiving function, the software also includes other functions to save documents. These can be used in parts independently of the archive function.

9.22.1 Save Changes

The Classification dialog is enabled if you make changes to a scanned document (for example: Rotate Pages, Delete Pages...). To unlock the document for Classification, the changes must be saved first. Complete the following steps:

1. Make the required modifications to the document.

2. Use the function "Save". To use the function, there are several options:

    a) Click the menu "File - Save" **or**

    b) Click the toolbar icon "Save" **or**

    c) Enter this shortcut: CTRL + S

Figure 9.43: Icon - Save

9.22.2 Save as PDF

This feature requires a licence of the ecoDMS full version but can be tested during the demo time. In the Free4Three version this function is not enabled.

The scanned documents can be saved as a PDF file locally, on a data carrier or in the file system.

1. Select the document.

2. Use the function "Save as PDF". To use the function, there are several options:

    a) Click the menu "File - Save as PDF" **or**

    b) Click the toolbar icon "Save as PDF"

3. Use the file name and the destination to specify the PDF in the dialog that opens.

4. You can also save the file as a searchable PDF.

    a) To do so, enable the command "Save as searchable PDF".

        i. This function is only included in the ecoDMS full version.

5. Click "Save" to save the PDF or "Cancel" to cancel the process.

Figure 9.44: Icon - Save as PDF

9.22.3 Save As

The scanned documents can be saved on a data carrier or in the file system.

1. Select the document.

2. Use the function "Save as". To use the function, there are several options:

   a) Click the menu "File - Save as" **or**

   b) Click the toolbar icon "Save as"

3. Use the file name and the destination to specify the file in the dialog that opens.

4. Click "Save" to save the file or "Cancel" to cancel the process.

Figure 9.45: Icon - Save as PDF

10 Classification

Via Classification you can assign, for example, the virtual destination folder in ecoDMS, the document type, the status, the responsibilities and many more archiving details to each file you archive. These details allow documents to be systematically filed and easily retrieved through keyword search as an alternative and/or in addition to the full-text search. The following chapter describes various methods and options for document classification.

- Viewing and using this function requires specific system permissions.
- A document may only be classified and versioned if the user has a permission to classify the specified document.
- Administrators can define the appropriate classification attributes and mandatory fields for each document type via the settings dialog. The display and order of the attributes therefore depends on the settings.
- You can install server and client in different languages. The view of the classification attributes and messages depends on the language you have selected for the ecoDMS server component.
- The preview in the classification dialog is only displayed for PDFs and files that are archived via the ecoDMS Plugins or the PDF/A printer.

10.1 Classification dialog

You have several methods and options to classify documents. The Classification dialog is very important. This includes all stored Classification Information. For almost any archiving the Classification Dialog Box is relevant.

Figure 10.1: Classification dialog with Preview

10.1.1 Open Classification dialog

To open the classification dialog in ecoDMS, complete the following steps:

1. Select the documents
    a) Press and hold the CTRL key to select several documents at once

2. Select the "Classify" function using one of the following methods:
    a) **Card view:** Double-click in the document information area (1st tab on the card)
    b) **Table view:** Right-click one of the selected documents in the table -> Classify
    c) **Toolbar:** Click the Classify icon on the toolbar.
    d) **Keyboard shortcut:** CTRL + K

Figure 10.2: Icon - Classify

10.1.2 Change order of Attributes

Administrators can define the appropriate classification attributes and mandatory fields for each document type via the settings dialog. The display and order of the attributes therefore depends on the settings. Please refer to the section "Settings -> Document Types & Retention Periods" for more details.

10.1.3 Show/Hide Attributes

Administrators can define the appropriate classification attributes and mandatory fields for each document type via the settings dialog. The display and order of the attributes therefore depends on the settings. Please refer to the section "Settings -> Document Types & Retention Periods" for more details.

10.1.4 Undo

The "Undo" button reverts all previously made classification settings and returns the classification of the selected document to its last saved state. If, for example, ecoDMS recognises a "classification template", you can reset the automatic Classification by clicking the Undo button for the specific document.

10.1.5 OK

To save the classification, click "OK"

10.1.6 Save and Continue

If you have opened several documents for classification, click the "Save and Continue" button to save the change(s) made to the document and to edit the next one.

10.1.7 Skip Between Documents

If you have selected several documents for simple classification, you can use the keys (in the upper area of the classification window) to skip between documents.

10.1.8 Cancel - Message

If you have not saved your changes to the classification, a message displays. Click "Yes" to save and "No" to discard the changes.

10.2 Classify

There are various classification attributes available for the Classification (assignment / assignment of meta data) of archived documents. A distinction is made between "standard attributes" that are integrated in the system and "user-defined attributes". The following chapters explain the "Standard Attributes".

10.2.1 DocID

DocID stands for "Document Identification Number". A sequential document identification number is automatically allocated to each archived document. The user cannot edit or enter the DocID manually [3, 4, 1].

10.2.2 Main Folder

The main folders are determined by the folder structure and are allocated automatically. The user cannot create the main folder manually.

> – If you have not yet selected a folder, the entry "Not assigned" is displayed. As soon as you have selected a folder from the folder structure, the system automatically recognises and enters the associated main folder.
> – For more information on this topic, please refer to the chapter on "Settings - Folder Structure".

10.2.3 Folder

> – Tip: If the folder window is open, you can jump directly to the required folder by entering the first letters or numbers of the folder name (also see Folder Search).
> – Information: A user can only see the folders, documents and classifications for which the user has a permission.

Folders are determined by the folder structure and can either be selected manually or automatically via classification templates and/or via the "folder recognition". The folder determines the virtual file destination in ecoDMS. If you have not yet selected a folder, the entry "Not assigned" is displayed. You can also create folders directly through the Classification dialog or the folder structure if you have the according permission. In the following you will learn how to select a folder:

10.2.3.1 Classification dialog

1. Open the Classification dialog for the document(s).

2. Select the entry field for the "Folder" attribute.

3. Open the Folder Structure:

    a) Either by double-clicking the entry field **or**

    b) By entering the letter "e" (edit).

4. Select the folder

    a) by double-clicking it in the Folder Structure **or**

    b) by entering the folder name, the key, or deposited keywords into the Folder Structure.

        i. In this case an input window opens.

        ii. ecoDMS selects the folder you searched for. Use the "F3" key to continue the search.

        iii. Confirm your entry selection with the "Enter" key.

Figure 10.3: Searching for Folders

10.2.3.1.1 Copy & Paste Text If a document preview is displayed in the Classification dialog, you can select the preview contents and use it for classification. In the Inbox this information can be copied from the "View" window. To do so, complete the following steps [2]:

1. In the Classification dialog, select the entry field for the "Folder" attribute.

2. Press the "CTRL" key and Right-click the area where you want to paste the content, in the "preview".

3. If you enter the "Folder" attribute, the Folder Structure opens. The copied content is recorded as a search term for the folder.

4. Select the folder and confirm your selection with "Enter".

> – The preview in the classification dialog is only displayed for PDFs and files that are archived via the ecoDMS Plugins or the PDF/A printer.

10.2.3.2 Table View (ecoDMS)

> – The table is the outdated document view in ecoDMS.
> – There is a new, modern document view which clearly displays all information and functions in form of cards.

1. Select the document in the ecoDMS table.

2. Select the "Folder" attribute.

3. Open the Folder Structure:
   a) Either by double-clicking the entry field **or**
   b) By entering the letter "e" (edit).

4. Select the folder
   a) by double-clicking it in the Folder Structure or
   b) by entering the folder name, the key, or deposited keywords into the Folder Structure.
      i. In this case an input window opens.
      ii. ecoDMS selects the folder you searched for. Use the "F3" key to continue the search.

iii. Confirm your entry and selection with the "Enter" key.
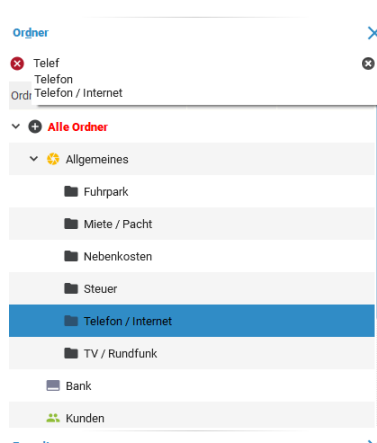
Figure 10.4: Searching for Folders

10.2.3.3 Drag & Drop Classification in ecoDMS

1. Press and hold the CTRL key to select several documents at once

2. Select the documents in ecoDMS

3. Grab your selection in the area of a DocID

4. Now drag it onto a folder in the folder tree

10.2.4 Comment

The "Comment" box is a free text box which can be filled with any content. You can either enter the comment manually or ecoDMS can automatically enter the comment via the classification templates, which can be recognised from the file name. In the following you will learn how to enter the attribute.

10.2.4.1 Classification dialog

1. Open the Classification dialog for the document(s).

2. Select the entry field for the "Comment" attribute.
   a) Either by double-clicking **or**
   b) By entering the letter "e" (edit).

3. Enter the comment.

10.2.4.1.1 Copy & Paste Text If a document preview is displayed in the Classification dialog, you can select the preview contents and use it for classification. In the Inbox this information can be copied from the "View" window. To do so, complete the following steps:

1. In the Classification dialog, select the entry field for the "Comment" attribute.

2. You now have the following options to apply the text from the preview
   a) CTRL + hold right mouse button over text = text is inserted and appended to any existing text
   b) CTRL + SHIFT + hold right mouse button held over text = text is inserted and overwrites any existing text

> – The preview in the classification dialog is only displayed for PDFs and files that are archived via the ecoDMS Plugins or the PDF/A printer.

10.2.4.2 Table View (ecoDMS)

> – The table is the outdated document view in ecoDMS.
>
> – There is a new, modern document view which clearly displays all information and functions in form of cards.

1. Select the document in the ecoDMS table.

2. Select the entry field for the "Comment" attribute.

   a) Either by double-clicking <u>or</u>

   b) By entering the letter "e" (edit).

3. Enter the comment.

10.2.5 Status

A status provides information about the processing status of a document. As a default, 3 statuses are deposited in ecoDMS:

1. Done

2. Resubmission (please read the chapter "Resubmissions")

3. ToDo

These can be renamed or enhanced by the administrator, but not deleted. You can either assign a status manually or ecoDMS recognises it automatically through the classification templates. In the following you will learn how to manually select the Status:

10.2.5.1 Classification dialog

1. Open the Classification dialog for the document(s).

2. Select the entry field for the Status attribute.

   a) Either by double-clicking **or**

   b) By entering the letter "e" (edit).

3. Select the Status.

   a) If you select Resubmission, the calendar opens to enter the resubmission date.

   b) Select the date in the calendar.

      i. Use the arrow keys (left, right) to switch between the months.

      ii. You can change the month and the year using the navigation in the calendar ribbon.

      iii. Click "Today" to set the current day.

      iv. You can also enter the date directly. The first number is entered in the calendar.

   c) Confirm your entry and selection with "OK".
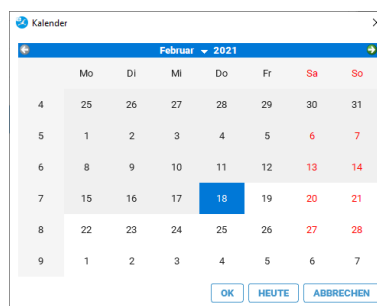
Figure 10.5: Calendar - Select Date

10.2.5.2 Table View (ecoDMS)

> – The table is the outdated document view in ecoDMS.
>
> – There is a new, modern document view which clearly displays all information and functions in form of cards.

1. Select the document in the ecoDMS table.

2. Select the entry field for the Status attribute.
   a) Either by double-clicking **or**
   b) By entering the letter "e" (edit).

3. Select the Status.
   a) If you select Resubmission, the calendar opens to enter the resubmission date.
   b) Select the date in the calendar.
      i. Use the arrow keys (left, right) to switch between the months.
      ii. You can change the month and the year using the navigation in the calendar ribbon.
      iii. Click "Today" to set the current day.
      iv. You can also enter the date directly. The first number is entered in the calendar.

4. Confirm your entry and selection with "OK".

Figure 10.6: Calendar - Select Date

10.2.5.3 Drag & Drop Classification in ecoDMS

1. Press and hold the CTRL key to select several documents at once.

2. Select the documents in ecoDMS.

3. Grab your selection in the area of a DocID.

4. Now drag it onto a status.

5. If you select Resubmission, the calendar opens to enter the resubmission date.
   a) Select the date in the calendar.
      i. Use the arrow keys (left, right) to switch between the months.
      ii. You can change the month and the year using the navigation in the calendar ribbon.
      iii. Click "Today" to set the current day.
      iv. You can also enter the date directly. The first number is entered in the calendar.

6. Confirm your entry and selection with "OK".
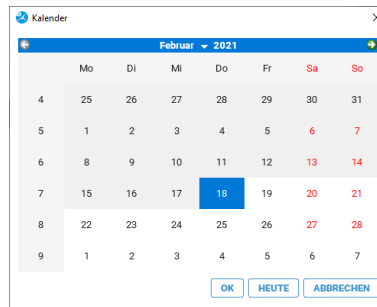
Figure 10.7: Calendar - Select Date

10.2.6 Revision

The revision is automatically assigned by the system. The revision increments by one with each change to the classification of a document. At the same time an entry is made in the document history. The revision number shows how often a file was changed within the classification after archiving. The user cannot change the DocID. The revision only refers to changes within the Classification. ecoDMS records any change to the classification attributes of a document in a history. All processing and archiving steps are thus automatically logged and can be reproduced at any time.

10.2.7 Document Type

When assigning documents, the type of document (e.g. incoming invoices, outgoing invoices, agreement, offer is specified in Document Type. We recommend you select the Document Type when classifying each document you archive. This makes the handling and the retrieval of documents much easier. You can either assign a status manually or ecoDMS recognises it automatically through the "classification templates". If you have not yet selected a Document Type, the entry "Not assigned" is displayed. In the following you will learn how to manually select the Document Type:

10.2.7.1 Classification dialog

1. Open the Classification dialog for the document(s).

2. Select the entry field for the Document Type attribute.

    a) Either by double-clicking **or**

    b) By entering the letter "e" (edit).

3. Select the Document Type.

10.2.7.2 Table View (ecoDMS)

> – The table is the outdated document view in ecoDMS.
> – There is a new, modern document view which clearly displays all information and functions in form of cards.

1. Select the document in the ecoDMS table.

2. Select the entry field for the Document Type attribute.

    a) Either by double-clicking **or**

    b) By entering the letter "e" (edit).

3. Select the Document Type.

10.2.8 Last Change

If a change is made to the classification after the archiving process, the date and time of the last change to the document is displayed here. The classification attribute is automatically allocated and cannot be entered manually by the user [3, 1].

10.2.9 Date

The date is automatically assigned when archiving, but it can be changed if necessary. We recommend you store the actual postal date of receipt of the document as date in ecoDMS. When searching for documents, the actual date can be included in the search. You can either assign a status manually or ecoDMS recognises it automatically. In the following you will learn how to manually select the "date" [3, 1]:

10.2.9.1 Classification dialog

1. Open the Classification dialog for the document(s).

2. Select the entry field for the "Date" attribute.
   a) Either by double-clicking **or**
   b) By entering the letter "e" (edit).

3. The calendar dialog opens. Select the date in the calendar.
   a) Use the arrow keys (left, right) to switch between the months.
   b) You can change the month and the year using the navigation in the calendar ribbon.
   c) Click "Today" to set the current day.
   d) You can also enter the date directly. The first number is entered in the calendar.

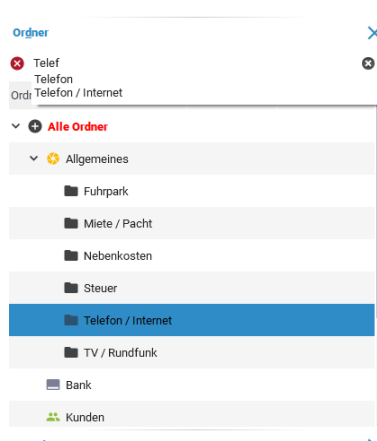4. Confirm your entry and selection with "OK".
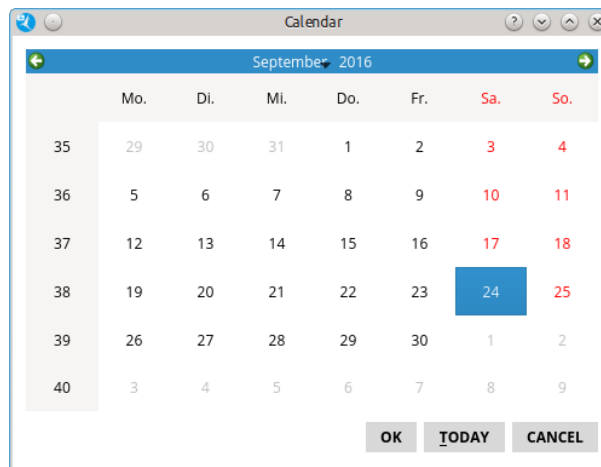
Figure 10.8: Calendar - Select Date

10.2.9.1.1 Copy & Paste Text If a document preview is displayed in the Classification dialog, you can select the preview contents and use it for classification. In the Inbox this information can be copied from the "View" window. To do so, complete the following steps:

1. In the Classification dialog, select the entry field for the "Date" attribute.

2. Press the "CTRL" key and Right-click the area where you want to paste the content, in the "preview".

ecoDMS recognises the following date formats:

1. yyyy.MM.dd

2. dd.MM.yyyy

3. dd.MM.yy

4. dd. MMM yyyy

5. dd. MMMM yyyy

6. dd MM yyyy

7. dd MMMM yyyy

8. dd.MMyyyy

9. ddMMyyyy

10. ddMM.yyyy

> – The preview in the classification dialog is only displayed for PDFs and files that are archived via the ecoDMS Plugins or the PDF/A printer.

10.2.9.2 Table View (ecoDMS)

> – The table is the outdated document view in ecoDMS.
> – There is a new, modern document view which clearly displays all information and functions in form of cards.

1. Select the document in the ecoDMS table.

2. Select the entry field for the "Date" attribute.
   a) Either by double-clicking **or**
   b) By entering the letter "e" (edit).

3. The calendar dialog opens. Select the date in the calendar.
   a) Use the arrow keys (left, right) to switch between the months.
   b) You can change the month and the year using the navigation in the calendar ribbon.
   c) Click "Today" to set the current day.
   d) You can also enter the date directly. The first number is entered in the calendar.

4. Confirm your entry and selection with "OK".

10.3 Permissions

To ensure that the documents can only be viewed and edited by authorised persons, you can assign individual permissions to each document and each folder in ecoDMS. This ensures confidentiality of the documents. You can assign permissions in the Classification dialog.
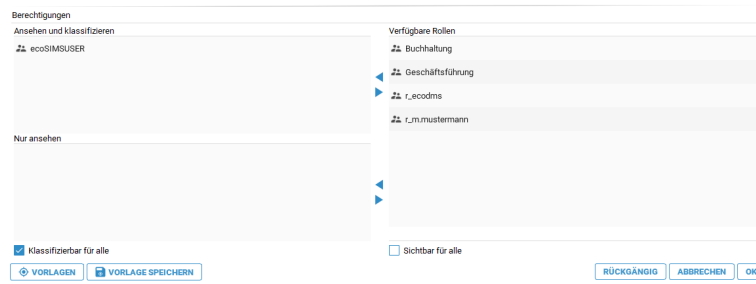
Figure 10.9: Classification dialog - Permissions

10.3.1 Assign Permissions

You assign permissions via drag & drop. The window on the right displays all available users. These can be dragged to the two boxes on the left. This specifies who may view a document and who may also classify the document.

 – Please note that at least one user must be entered in the "View and Classify" box.

10.3.1.1 View and Classify

This window contains all "roles" (users, groups) that are allowed to view and classify the document after the Classification is saved. Please note that at least one user or role (group) must be assigned in this permission window. To assign "roles" to this window, complete the following steps:

1. Select the "roles" (users, groups) in the "Available Roles" window.

    a) If you hold the "CTRL" key, you can select several roles simultaneously.

2. Drag and drop the "roles" into the "View and Classify" window.

    a) Alternatively, you can assign the "roles" to the window with the upper arrow icon (arrow right).

10.3.1.2 View Only

This window contains all "roles" (users, groups) that are only allowed to view but not classify the document after the Classification is saved. To assign "roles" to this window, complete the following steps:

1. Select the "roles" (users, groups) in the "Available Roles" window.

    a) If you hold the "CTRL" key, you can select several roles simultaneously.

2. Drag and drop the "roles" into the "View Only" window.

    a) Alternatively, you can assign the "roles" to the window with the lower arrow icon (arrow left).

10.3.1.3 For Classification by All Users

If the "For Classification by All Users" function is enabled, the document can be viewed and classified by all users after the classification has been saved. Exception: The associated folder limits access with more permissions:

 – The "ecoSIMSUSER" role is entered by the system in the "View and Classify" window when the command is enabled.

10.3.1.4 For View by All Users

If you enable the "For View by All Users" function, all users can view the document after you save the classification. Exception: The associated folder limits access with more permissions.

 – The "ecoSIMSUSER" role is entered by the system in the "View Only" window when the command is enabled.

10.3.2 Remove Permissions

To remove permissions, complete the following steps:

10.3.2.1 View and Classify

This window contains all "roles" (users, groups) that are allowed to view and classify the document after the Classification is saved. Please note that at least one user or role (group) must be assigned in this permission window. To remove a profile from the "Roles" window, complete the following steps:

1. Select the "roles" (users, groups) in the "View and Classify" window.

    a) If you hold the "CTRL" key, you can select several roles simultaneously.

2. Drag and drop the "roles" into the "Available Roles" window.

    a) Alternatively, you can assign the "roles" to the window with the upper arrow icon (arrow right).

10.3.2.2 View Only

This window contains all "roles" (users, groups) that are only allowed to view but not classify the document after the Classification is saved. To remove "roles" from this window, complete the following steps:

1. Select the "roles" (users, groups) in the "View Only" window.

    a) If you hold the "CTRL" key, you can select several roles simultaneously.

2. Drag and drop the "roles" into the "Available Roles" window.

    a) Alternatively, you can assign the "roles" to the window with the lower arrow icon (arrow right).

10.3.2.3 For Classify by All Users

If the "For Classify by All Users" command is disabled, the document cannot be viewed and classified by all users after the Classification is saved (please note the folder permission):

- The "ecoSIMSUSER" role is removed from the system in the "View and Classify" window when the command is disabled.

10.3.2.4 For View by All Users

If the "For View by All Users" command is disabled, the document cannot be viewed by all users after the Classification is saved (please note the folder permission).

- The "ecoSIMSUSER" role is removed from the system in the "View Only" window when the command is disabled.

10.4 Preview

- For mass classification, there is no preview window in the Classification dialog.
- This feature requires a licence of the ecoDMS full version but can be tested during the demo time. In the Free4Three version this function is not enabled.

When archiving via the Office Plugins or the PDF/A Printer and when generally saving PDF files, a preview is also displayed inside the Classification dialog. From this preview window, you can use text passages and date fields for the classification.

10.5 Mass Classification

When mass classifying, you can classify several documents simultaneously with the same information. There are several ways to open this function. When using the mass classify function, only fill in the boxes which you want to apply to all the documents you want to classify. All other classification attributes are not overwritten.

10.5.1 Massenklassifizierung öffnen

1. Select the documents.

   a) Press and hold the CTRL key to select several documents at once.

2. Wählen Sie nun die Funktion "Massenklassifizieren" aus. Hierzu können Sie eine der folgenden Aufrufe nutzen:

   a) **Table view:** Right-click one of the selected documents in der Tabelle -> Massenklassifizieren

   b) **Toolbar:** Das Massenklassifizieren-Icon in der Symbolleiste anklicken

   c) **Keyboard shortcut:** CTRL + Shift + K

Figure 10.10: Icon - Massenklassifizieren

Figure 10.11: Massenklassifizierung (hier: blanko)

10.5.2 Permissions in Mass Classification

Through mass classification you can align the permissions of the selected documents. This is an optional process. The permissions can also be omitted during mass classification. However, the user will always require a permission to classify the selected documents.

1. Start Mass Classification.

2. Activate the "Permission" by selecting the box.

3. Assign permissions as usual.

10.6 Multiple Classification

Multiple classification allows a document to be classified several times (internal linking) without repeatedly saving it to the archive. This allows you to deposit different classifications for one document. The document is saved once in the database, but it can be assigned any number of classifications in the user interface. For example, you can assign a file to various folders in ecoDMS. The DocID for the document is then referenced several times in ecoDMS due to the different links.

- To assign additional classifications to a document, you must first create the document on separate tabs. You can edit and remove the tabs, if required, as long as you did not confirm the classification with "Save" or "OK".
- You can only edit and delete individual tabs until ecoDMS has saved and completed the classification.
- Editing a classification is still possible after saving. To do this, you require a permission for this classification entry.
- To delete such an entry, carry out the standard ecoDMS deletion process (delete function).

Figure 10.12: Icon - Classification

Figure 10.13: Multiple Classification

10.6.1 Multiple Classification / Add Tab

To assign further classifications to a document, complete the following steps:

1. Select document in the ecoDMS table.

2. Select the "Classify" function. You have following options:

   a) Right-click one of the selected documents - Classify **or**

      b) Click the "Classify" icon in toolbar **or**

      c) Enter this shortcut: CTRL + K

3. Enter the Classification Information (if not yet available)

4. To add "Multiple Classification" click the icon "Add Multiple Classification".

      a) Another classification window opens as a tab

5. Enter the additional information

      a) If necessary, you can add as many tabs as you like.

6. Save classification with "OK", or cancel the process with "Cancel".

10.6.2 Multiple Classification / Remove Tab

To remove a non-saved classification tab to a document, complete the following steps

1. To remove "Multiple Classification" click the icon "Remove Multiple Classification".

      a) The selected "Tab" will be deleted.

2. Save classification with "OK", or cancel the process with "Cancel".

10.6.3 Show Multiple Classification

If "Multiple Classifications" were saved to a document the DocID for the respective document in ecoDMS is assigned several times. When you open the Classification dialog for one of the multiple archived documents, the dialog shows all available tabs for which the user has permission [3].

1. Select document in the ecoDMS table.

2. Select the "Classify" function. You have following options:

      a) Right-click one of the selected documents - Classify **or**

      b) Click the "Classify" icon in toolbar **or**

      c) Enter this shortcut: CTRL + K

10.7 Batch Classify Multiple Documents

In ecoDMS you can batch classify multiple documents with different information.

1. To do so, select your documents using the CTRL key

2. Click "Classify"

      a) Card View and Table View: Button in the Icon bar -> "Classify"

      b) Table View: Right-click -> "Classify"

3. Execute the classification for the first document.

4. Click "Save and Continue"

      a) The classification of the current document is saved and the next selected document displays in the classification dialog

10.8 Undo Classification

You can undo a classification if necessary. All classification attributes of the selected document are then returned to the state it was last saved in.

- For newly archived documents all classification attributes are reset in this case.

- For already archived documents, the classification is reset to the last saved state.

To undo the classification of a document, complete the following steps [3]:

1. Classify an ecoDMS document via the Classification dialog.

2. Click "Undo".

11 Classification Templates

Customised classification templates allow automatic document recognition, assignment and archiving. Incoming documents can be automatically assigned according to specified attributes and archived without further user action in a dark process if required. Document recognition is based on pre-configured keywords, barcodes, layouts or identified zones, which are saved in so-called classification templates. If a document which matches a template reaches the archive, the template designer automatically searches for the matching classification template and executes the processes specified in the template.

- Successful execution of the classification templates depends on the file type, the content, and the readability and quality of the documents.
- By default, every user with a permission to archive and classify documents can use classification templates.
- To create and edit classification templates, the system requires an additional permission (ecoSIMSTEMPLATES).
- Automatic document assignment is based on classification templates. A template specifies how the document is (automatically) stored / classified in ecoDMS. ecoDMS can differentiate between simple templates and form templates.
- Template recognition is performed for...
    - PDF and TIFF files during standard and drag & drop archiving in ecoDMS (Windows, Ubuntu, Debian, macOS),
    - PDF and TIFF files of documents scanned in via scaninput (Windows, Ubuntu, Debian, macOS),
    - files archived via PDF/A Printers (Windows, Ubuntu, Debian),
    - files archived via Libre / OpenOffice Plugin (Windows, Ubuntu, Debian, macOS),
    - files archived via MS Office Plugin, including Outlook (Windows),
    - files archived via Thunderbird Plugin (Windows, Ubuntu, Debian)
- If ecoDMS recognises several classification templates for a document, it displays them on tabs as mass classification in the Classification dialog.
    - **Before** archiving, delete all classification tabs that do not apply.
    - Otherwise the document is archived with multiple classifications (mass classification).
    - The document number (DocID) would in this case occur several times and with different classifications in ecoDMS.
    - The classification of the individual DocIDs depends on the retrieved classifications.
    - To avoid loading various classifications, we recommend you assign unambiguous criteria when creating your classification templates.
- **Information:** This feature requires a licence of the ecoDMS full version but can be tested during the demo time. In the Free4Three version you can save a maximum of 1 classification template.
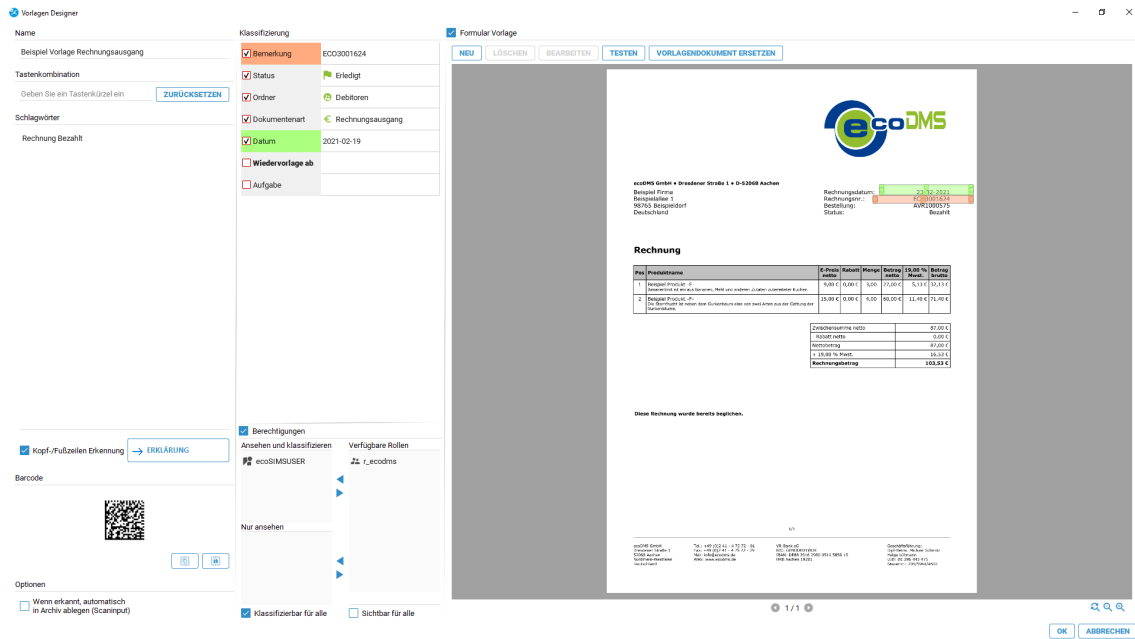
Figure 11.1: Template Designer for Creating Classification Templates

11.1 Manage Templates

You can open template management through the Classification dialog of any document. Different functions are available depending on your user permissions. Please note that you require the ecoSIMSTEMPLATE system permission "The user may use template management" to manage classification templates.

11.1.1 Open Template Management

You have the following options to open template management. Select one:

1. **Classification dialog:**
   a) Open the Classification dialog of any document.
   b) To open template management, click the "Templates" button.

2. **Toolbar:**
   a) Select a document in the ecoDMS table.
   b) To open template management, click the "Template" icon in the toolbar.

Figure 11.2: Open Template Management (Icon)

11.1.2 Apply Template

Template recognition is either automatic (depending on the settings and on the document) or the template is selected manually. The following options are available to manually retrieve a template:

1. Open the Classification dialog of the respective document.

2. Three options are available:
   a) Click the "Template" button in the Classification dialog, select the required template and click "Apply".
   b) Right-click in the "Permissions" area and then click "Templates" to select the required template from the list.
   c) If a keyboard shortcut is defined for the required classification template, enter the shortcut.

3. The classification defined in the template is accepted.

11.1.3 Edit Template

If you have the respective permission, you can edit existing templates:

1. Open the Classification dialog of a document.
2. Click the "Templates" button.
3. In the Classification Templates dialog, select the template you want to edit.
4. Click "Edit".
5. Make your changes.
6. Click "OK" to save the process or abort the process by clicking "Cancel".

11.1.4 Replace PDF File

If you want to replace the PDF file (template master) for an existing classification template, complete the following steps:

1. Open the Classification dialog for the document which serves as the new template master.
2. Click the "Templates" button.
3. In the Classification Templates dialog, select the template you want to edit.
4. Click "Edit".
5. In the "Form Template" window, click the "Replace Image" button.
6. ecoDMS replaces the existing file preview with the classification preview of the new file.
7. Click "OK" to save the process or abort the process by clicking "Cancel".

11.1.5 Select Templates

You can assign templates manually to documents or let the system do this automatically.

1. You can select templates manually in the Classification dialog and use them for Classification.
2. The template recognition can also be started manually in the Inbox after scanning (e.g. for imported documents or documents scanned via TWAIN/WIA/SANE).

11.1.6 Copy Template

If you have the respective permission, you can copy existing templates:

1. Open the Classification dialog of a document.
2. Click the "Templates" button.
3. In the Classification Templates dialog, select the template you want to copy.
4. Click "Copy".
5. Enter a name for the new template.
6. The Template Designer opens.
   a) Make any changes if necessary.
7. Click "OK" to save the process or abort the process by clicking "Cancel".

11.1.7 Delete Template

If you have the respective permission, you can delete existing templates:

1. Open the Classification dialog of a document.

2. Click the "Templates" button.

3. In the Classification Templates dialog, select the template you want to delete.

4. Then click "Delete".

5. Click "OK" to save the process or abort the process by clicking "Cancel".

11.2 Create Simple Templates

– Simple templates are based on keywords that must occur in the document to ensure the assignment is performed as specified.

– The document layout is not considered in this case.

– The user enters the keywords in the template designer, which ecoDMS saves as classification template.

ecoDMS can automatically classify documents based on their contents. To do so, ecoDMS needs to know the necessary keywords that occur in the document. You can enter the keywords in the template designer. If ecoDMS archives the document which matches the specified template criteria, the software automatically fills in the classification attributes according to your specifications.
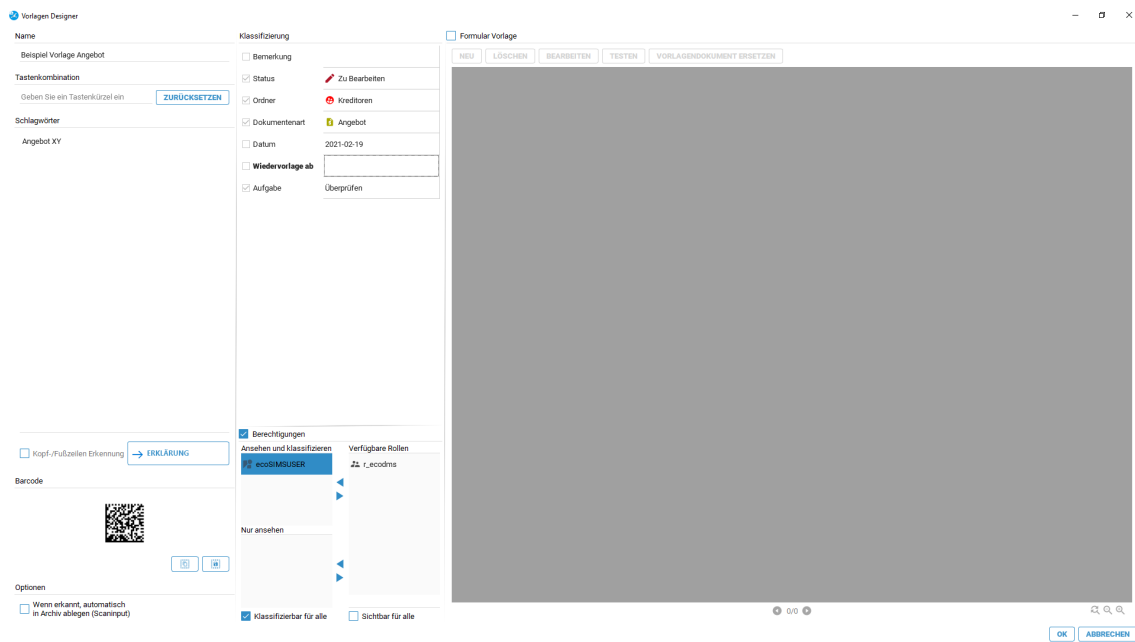
Figure 11.3: Template Designer - Simple Classification Template

11.2.1 Create Template

To create a simple template (without additional form / layout recognition), complete the following steps[2, 1]:

1. Open the Classification dialog for any document.

2. Execute the "Save Template" function. To do this, you have the following options:

a) Click the "Save Template" button.

b) Right-click the mouse in the Permissions window and select "Save Classification as Template".

3. The Template Designer opens. To create a "simple template" with Keyword Detection, use the following fields:

4. **Name:** Enter a name for the template. Use the name to retrieve and recognise the template.

5. **Keyboard shortcut:** As an option, you can store a shortcut. You can use this shortcut later to open the "classification template" manually in the Classification dialog.

a) Use the "Reset" button to remove the "shortcut".

6. Now specify the relevant criteria for the form template.

a) This is described in the following steps.

7. **Automatic recognition:** You can only enable this field in combination with a "formula template". To create a pure "Keyword template" the function is not necessary.

8. Save the template with "OK" or abort the process with "Cancel".

11.2.2 Keywords

Enter the keywords which are prerequisite for template recognition. The "template" is only recognised and executed if the document, in addition to the layout, contains exactly those keywords. In case of a successful match and recognition, the stored classification information is loaded.

- If you use keywords, all keyword deposited in ecoDMS must exactly match the words in the document. Use unambiguous terms, e.g. the VAT-ID or the customer number of a company.
- Enter keywords without a hyphen or a comma. The recorded words are " and" -linked.
- For the detection, all detected items must be included in the document in the same notation.
- **Example:** The document has the following contents: These contents are required for the application of the classification saved in the template. Enter the contents one by one:

```
UID: 123456789
Invoice
```

11.2.2.1 Apply Text from Preview

1. To use text from the preview for keywords, you have the following options:

a) CTRL + hold right mouse button over text = text is inserted and appended to any existing keywords

b) CTRL + SHIFT + hold right mouse button over text = text is inserted and overwrites any existing keywords

11.2.2.2 Expert Funcion (RegEx)

As an option, you can extend the keyword recognition with regular expressions. In this way, you can limit the search results even more accurately. Please use a separate line for each command: The following examples are a small extract from the many possibilities offered by calling a "REGEX":

1. Document contains "Invoice"

```
REGEX:\b(Invoice)\b
```

2. Document contains "Invoice" or "Delivery Note"

```
REGEX:\b(Invoice|Delivery Note)\b
```

3. Document does not contain "Contract"

```
!REGEX:\b(Contract)\b
```

4. Document contains "Invoice" but not "Contract"

```
REGEX:\b(Invoice)\b
!REGEX:\b(Contract)\b
```

5. You can also use a combination of REGEX and simple keywords.

11.2.3 Options (for Scaninput Folder)

When creating a template, you can configure whether you want the document to be saved automatically in ecoDMS without manual action by a user.

1. To activate "automatic archiving", enable the checkbox "Automatically move to archive if detected" in the "Options" section of the Template Designer.

2. Then select the "target folder".

   a) This process is exclusively available for documents that have been retrieved via the "scaninput folder" and are successfully detected by the template designer.

   b) If ecoDMS detects several classification templates to which different target folders have been assigned, the document is not automatically archived.

   c) It opens in the Inbox instead.

   d) If this function is not enabled or the template is not automatically recognised, the scanned document is opened in the Inbox for manual classification and archiving.

11.2.4 Classification

1. Fill in the attributes in the classification window.

   a) Assign the values which you want to save for the classification.

2. Then enable the attributes you want to be accepted when the classification template is executed, by checking the boxes in the classification window.

   a) When the template is executed, only the enabled attributes in this window are overwritten. All other attributes are not affected by the template.

   b) You can enter the values manually **or** let the system read the values automatically using the Colored fields in the document.

3. As an option, you can enable the permissions for the "Classification Template". In this case the Permissions stored here are also used for Classification.

4. Save the template by clicking "OK" or cancel the operation with "Cancel".

11.3 Create Form Templates

The content of specific zones of a one or multi-page document can be accepted automatically for classification. ecoDMS, for example, recognises the invoice number, the date, the invoice total or the matching target folder and populates the Classification dialog with the recognised values. To do so, the user marks the respective zones once in a base document. If documents have a different number of pages, you can specify the target page (Example: The invoice total is always on the last page).
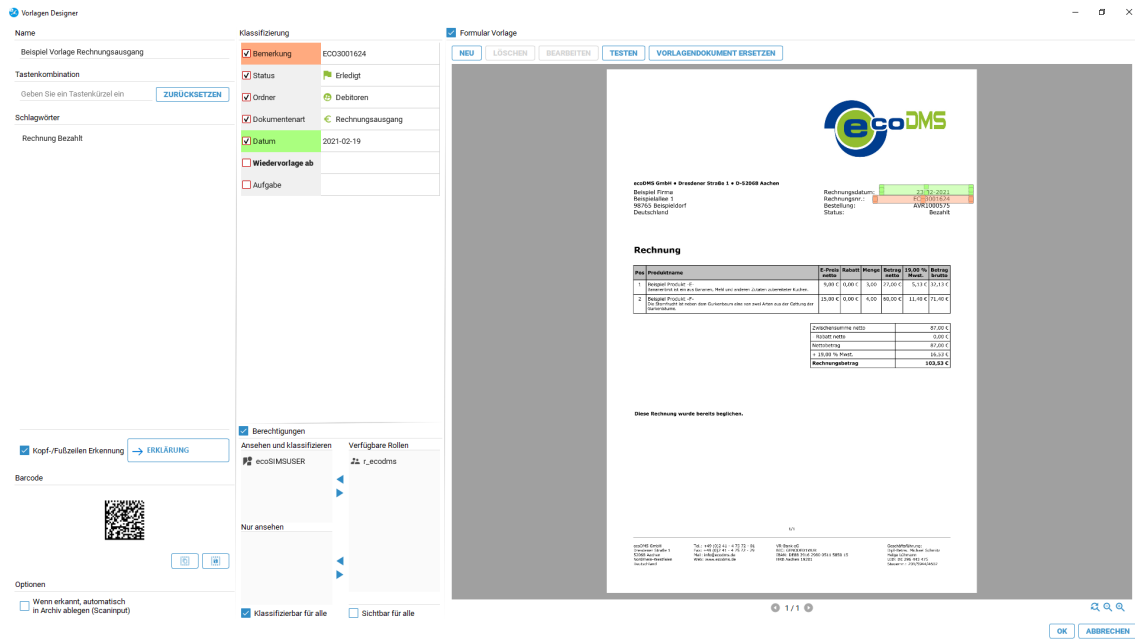
Figure 11.4: Template Designer - Form Template

11.3.1 Create Template

To create the classification attributes with the "form template", complete the following steps:

1.

> – **Information:**
>   – **Form templates are based on layouts and positions in a document.**
>   – **The user specifies the document layout in the template designer, which ecoDMS saves as template.**
>   – **Moreover, the user can highlight fields in the document in Color.**
>   – **The content of these fields is then included in the selected classification attributes.**
> – **Tip:**
>   – **When creating your classification template, use a PDF document as a master for layout and content. In the Template Designer, you can then select the required text zones and assign the content of each text zone to a classification attribute. If a matching document is archived, ecoDMS populates the recognised attributes automatically.**

Open the Classification dialog for the document which should serve as the new form recognition template.

> Make sure that this is a PDF file. Otherwise the preview for creating of the "form template" cannot be displayed.

2. Execute the "Save Template" function. To do this, you have the following options:
   a) Click the "Save Template" button **or**
   b) Right-click the "Permissions" area and select "Save Classification as Template".

3. The Template Designer opens. To create a form template, complete the following steps:

4. **Enable the "Form template" checkbox.**

5. <u>Name:</u> Enter the name for the template. Use the name to retrieve and recognise the template.

6. <u>Keyboard shortcut:</u> As an option, you can save a keyboard shortcut here. This keyboard shortcut can be used later to manually open the classification template in the Classification dialog.

a) Use the "Reset" button to remove the "keyboard shortcut".

7. Now specify the relevant criteria for the form template.

a) This is described in the following steps.

8. Save the template with "OK" or abort the process with "Cancel".

11.3.2 Ribbon / Footer Recognition

This checkbox can only be enabled in combination with a form template. The Form Template option must therefore be enabled. If this option is enabled, ecoDMS reads the ribbon and footer of a document in the background and saves it as an essential property for recognising the classification template.

- Depending on the resolution and the quality, approx. 10 - 20 percent of the upper and the lower part of a document are stored in the template as identifying feature.
- If no other criteria (keywords) are stored, the ribbon and footer of the document must match the template to execute automatic pre-classification.
- If you want to enter additional keywords, the keywords and the ribbons and footers must match the template for the template to be recognised.
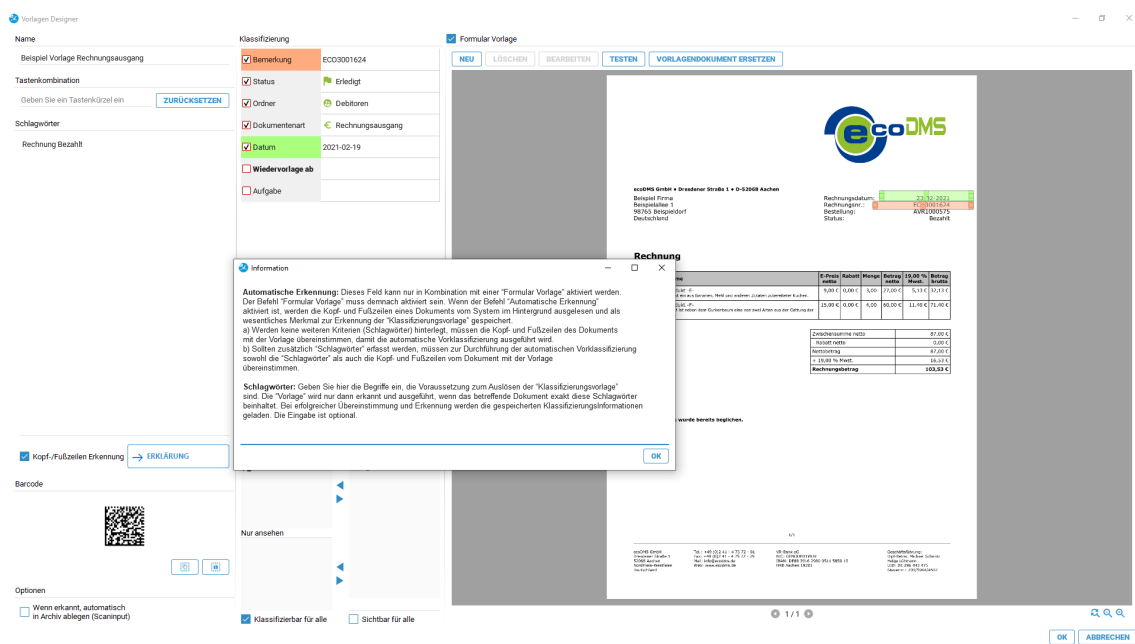
Figure 11.5: Template Designer - Form Template: Ribbon and Footer Recognition

11.3.3 Keywords

As an option, you can enter the keywords which, in addition to the layout, are prerequisite for template recognition. The "template" is only recognised and executed if the document, in addition to the layout, contains exactly those keywords. In case of a successful match and recognition, the stored classification information is loaded.

1. **Copy Single Text Snippet:**

```
CTRL + Win
```

Click the "Keywords" section. If you now press the indicated keys and select a text snippet in the preview window of the template designer by holding down the right mouse button, the keywords field is populated with the selected text snippet.

2. **Copy Multiple Text Snippets:**

```
CTRL + Shift + Win
```

Click the "Keywords" section. If you now press the indicated keys and select several text snippets in the preview window of the template designer by holding down the right mouse button, the keyword field is populated with the selected text snippets in the order of selection (one after the other).

When using keywords, you must note the following information:

1. If you use keywords, all keyword deposited in ecoDMS must exactly match the words in the document. Use unambiguous terms, e.g. the VAT-ID or the customer number of a company.

2. Enter keywords without a hyphen or a comma. The recorded words are " and" -linked.

3. For the detection, all detected items must be included in the document in the same notation.

Example: The document has the following contents: These contents are required for the application of the classification saved in the template. Enter the contents one by one:

```
UID: 123456789
Invoice
```

11.3.3.1 Expert Funcion (RegEx)

As an option, you can extend the keyword recognition with regular expressions. In this way, you can limit the search results even more accurately. Please use a separate line for each command: The following examples are a small extract from the many possibilities offered by calling a "REGEX":

1. Document contains "Invoice"

```
REGEX:\b(Invoice)\b
```

2. Document contains "Invoice" or "Delivery Note"

```
REGEX:\b(Invoice|Delivery Note)\b
```

3. Document does not contain "Contract"

```
!REGEX:\b(Contract)\b
```

4. Document contains "Invoice" but not "Contract"

```
REGEX:\b(Invoice)\b
!REGEX:\b(Contract)\b
```

5. You can also use a combination of REGEX and simple keywords.

11.3.4 Options (for Scaninput Folder)

When creating a template, you can configure whether you want the document to be saved automatically in ecoDMS without manual action by a user.

1. To activate "automatic archiving", enable the checkbox "Automatically move to archive if detected" in the "Options" section of the Template Designer.

2. Then select the "target folder".

    a) This process is exclusively available for documents that have been retrieved via the "scaninput folder" and are successfully detected by the template designer.

    b) If ecoDMS detects several classification templates that have been assigned different target folders, the document is not automatically archived. It opens in the Inbox instead.

    c) If this function is not enabled or the template is not automatically recognised, the scanned document is opened in the Inbox for manual classification and archiving.

11.3.5 Classification

1. Fill in the attributes in the classification window.

    a) Assign the values which you want to save for the classification.

2. Then enable the attributes you want to be accepted when the classification template is executed, by checking the boxes in the classification window.

    a) When the template is executed, only those attributes are overwritten, which are enabled in this window. All other attributes are not affected by the template.

    b) You can enter the values manually **or** let the system read the values automatically using the Colored fields in the document.

3. As an option, you can enable the permissions for the "Classification Template". In this case the Permissions stored here are also used for Classification.

11.3.6 Define Zones

– ecoDMS can automatically populate the classification with the contents of specific text zones in a PDF document. For example, ecoDMS can detect the invoice total at the end of a document with one or more pages and display the invoice total as a value in the classification.

– Moreover, specific RegEx calls enable the automatic assignment of a folder based on specific text passages or bar codes. Reading the date and any other text is also possible.

– For ecoDMS to recognise the required information, mark the respective zones in the document via the template designer and assign them to a classification attribute.

– After saving, the classification template becomes available to all users.

– In order to obtain exact results during automated classification, the selected PDF should match future PDFs of this kind in content and layout.
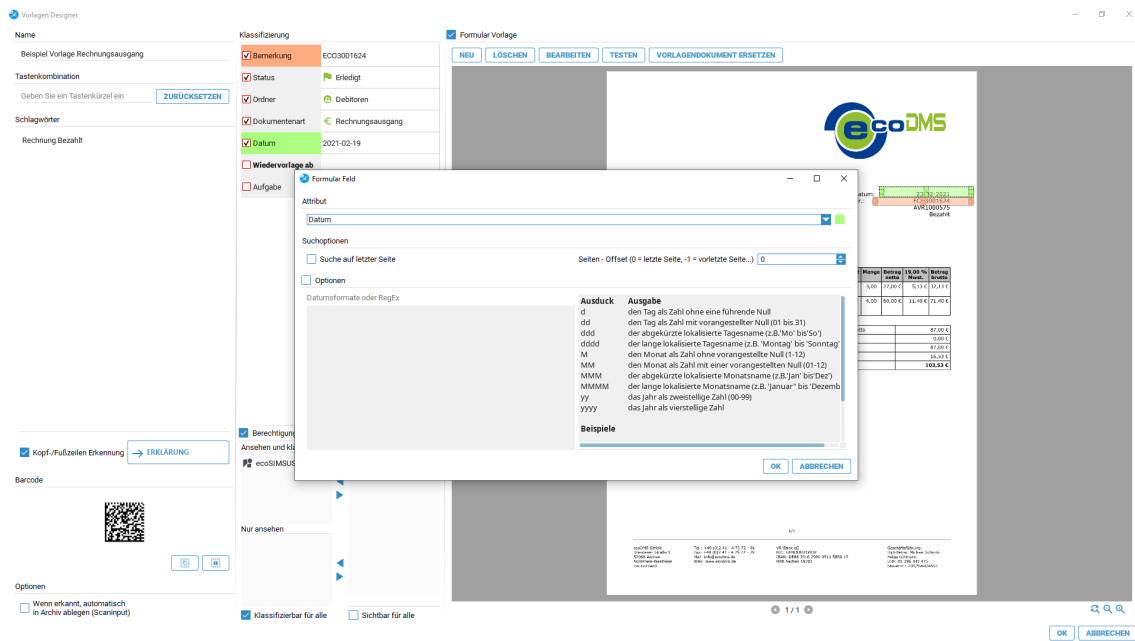
Figure 11.6: Template Designer - Form Template: Specify Attribute and Values (here: Date)

To specify the required text zones and their classification attributes, complete the following steps:

1. Click "New" in the "Form Template" window. The "Form Field" dialog opens:

2. Select the appropriate attribute from the list of available attributes.

   a) Click the "Color Box" to specify a Color. The Color is then used when marking and accepting the field information. Tip: Assign a different Color to each attribute!

   b) 1. Confirm your selection with "OK" or abort the process with "Cancel".

3. In the following dialog you can select the target attribute for the highlighted section.

4. **As an option, you can then make further settings.**

   a) **These depend on the selected attribute.**

   b) **The following subitems explain the available settings.**

5. Confirm the process with "OK", or abort the process by clicking "Cancel".

6. A box in the selected Color displays in the document preview. Position the box over the document zone that you want to read and accept for the selected attribute. Make sure that the box covers the selected content in a way that does not include too little and not too much information.

   a) You can resize the box to any hight and width. To resize the box, drag the outer points of the box.

   b) Use the "Zoom" icons to zoom the preview.

   c) Right-click and hold the mouse to select and zoom areas.

   d) Double-click the preview to adapt the page to the window.

7. Click "Test" to test the form.

   a) The classification of the "Template designer" is populated with the recognised content.

8. You can repeat this process for other attributes if required.

9. 18. Click "OK" to save the template or click "Cancel" to abort the process.

11.3.6.1 Search Settings

1. Search on last page: Enable this function if the target document can be one or multi-page and the required value is always on a specific page.

2. Page offset: For multi-page documents you can select which page contains the required content. First, enable the "Search on last page" function. The following examples show the value for the page offset:

   a) The invoice total is always on the last page of a document.

   ```
   0
   ```

   b) The invoice total is always on the penultimate page of a document.

   ```
   -1
   ```

3. Depending on the classification attribute, you can also make additional settings. To do so, enable the "Options" setting.

11.3.6.2 Date Format or RegEx

The date format can vary and may deviate from the normal standard. In the Options field, you can define the format of the date you want to read. The following expressions are available:

d   = one-digit day of the month without leading zero (1-31)

dd   = two-digit day with leading zero (01-31)

ddd   = three-character short form of the localised weekday (Mon-Sun)

dddd   = full name of the localised weekday (Monday-Sunday)

M   = one-digit month of the year without leading zero (1-12)

MM   = two-digit month of the year with leading zero (01-12)

MMM   = three-character short form of the localised month (Jan-Dec)

MMMM   = full name of the localised month (January-December)

yy   = two-digit year (00-99) yyyy   = four-digit year (e.g. 2019)

Examples:

dd.mm.yyyy 10.12.2018

mm/dd/yyyy 12/30/2018

d-M-yy   8-12-18

11.3.6.3 Permitted Characters (e.g. For Folders & Text Zones)

You can define characters in the highlighted area that ecoDMS should include in the classification. Specify the associated positions immediately after saving the changes to the dialog. When reading each position in the document, ecoDMS only transfers the specified characters for this attribute. Enter the valid characters without separators, blanks, or similar. All characters you enter are declared as allowed and authorised values; this also includes blanks.

1. If you only want to transfer numbers from the highlighted area, enter the valid numbers.

   a) Example values for valid characters:

   ```
   0123456789
   ```

   i. Example contents in a document:

   ```
   ABC#1234 ecD24!
   ```

    A. Result for the classification when including the allowed characters:

> ```
> 123424
> ```

2. If you only want to transfer numbers from the highlighted area, enter the valid letters. Please note the upper/lower case format.

    a) Example values for valid characters:

> ```
> AaBbCcDdEeFfGg
> ```

      i. Example contents in a document:

> ```
> ABC#1234 ecD24!
> ```

        A. Result for the classification when including the allowed characters:

> ```
> ABCecD
> ```

      ii. A combination of numbers, letters and special characters, etc, is also possible.

11.3.6.4 Expert Function (RegEx)

As an option, you can automatically read any text zones in a document with ecoDMS using regular expressions. The content you want to read need not be in the same position. However, it must occur in the area you highlighted. Specify the area immediately after saving the changes to the dialog. By using REGEX, you can, for example, search for the invoice total in a document and let ecoDMS transfer this for the classification. Please note that you can only use the REGEX function here for free-text classification attributes. Also, make sure you write each command in a separate line. The following examples are a small extract from the many possibilities offered by calling a "REGEX":

1. You want to transfer the net total of an invoice for the classification. To do this, ecoDMS must search for the value in the document, which is located behind the word "Net Total:".

> ```
> REGEX:(?<=Net Total:)\s*(\d{0,3}\.{0,1}\d{1,3},\d{2})
> ```

    a) The document, for example, contains: Net Total: 289.95

      i. The output for the classification in this example is: 289.95

> ```
> (?<=Net Total:) searches the character string that follows "Net Total:"
> ([\s]*) Wildcard for one or more spaces
> This REGEX matches up to a total of 999,999,999.99. You can increase the upper limit
>     by repeating the \d{0,3}\.{0,1} part of the expression.
> ```

    b) You want ecoDMS to transfer the term following the word "Name".

> ```
> REGEX:(?i)(?<=Name)([\s]*)\b([\S]*)\b
> ```

      i. The document, for example, contains: Name Doe

      ii. The output for the classification in this example is: Doe

> ```
> (?i) ignores upper/lower case format
> (?<=Name) searches for the character string that follows "Name"
> ([\s]*) Wildcard for one or more spaces
> \b([\S]*)\b Wildcard for the following term until the next space
> ```

11.3.6.5 Use the Following Information (Recognize Folder)

The folder can be assigned automatically based on the marked zones. For each folder you can save the name, a key and keywords in the settings dialog. This information can be included when the folder is assigned. If, for example, a key is recognised in the marked zone, ecoDMS can automatically assign the associated folder. Check the required information for folder assignment.

1. Folder Name

2. External Key

3. Buzzwords

11.3.6.6 Selection is a Barcode

If the zone you want to read is a barcode, complete the following steps:

1. Enable the "Options" command.

2. Then click "Selection is a barcode".
   a) The content saved in the barcode is then transferred as the attribute value.
   b) The form recognition function reads the content of barcodes and of 2D barcodes.

11.4 Dynamic Date

In classification templates, you can dynamically preassign values to date fields. For example, you can assign resubmission dates automatically. Numerous values can be used for the original date to determine the dynamic date. To change the dynamic date in classification templates, complete the following steps:

1. Open the ecoDMS Template Designer

2. Create or edit a classification template according to the instructions in the following sections of this manual: 11.2 and 11.3

3. Select the date attribute in the Classification area for which you want to assign a dynamic value (e.g. Resubmission from)

4. In the calendar, use "Dynamic date" to set the value for the start date. You can choose from several values to determine the start date, such as:
   – Today, Yesterday, Tomorrow, Month, Year, Last Week, This Week, This Month, This Quarter, This Year, and more.

5. If you want to extend the date by a specific value, click "Extended" and enter the appropriate number

> **Examples of a dynamic resubmission date:**
>
> ```
> Resubmission = Today + 7 days
> [TODAY] 2021-12-16 + 7 = 2021-12-23
> ```
>
> ```
> Resubmission = Month + 2 months
> [MONTH] 2021-12-22 + 2 = 2022-02-22
> ```
>
> ```
> Resubmission = Year + 10 years
> [2021-12-22 + 10 = 2031-12-31
> ```
>
> – If you save the dynamic date in a template, ecoDMS automatically adjusts the selected period.
> – When the classification template is recognised, ecoDMS automatically captures the resubmission date.

6. Click "OK" to save your selection, or click "Cancel" to abort the process.
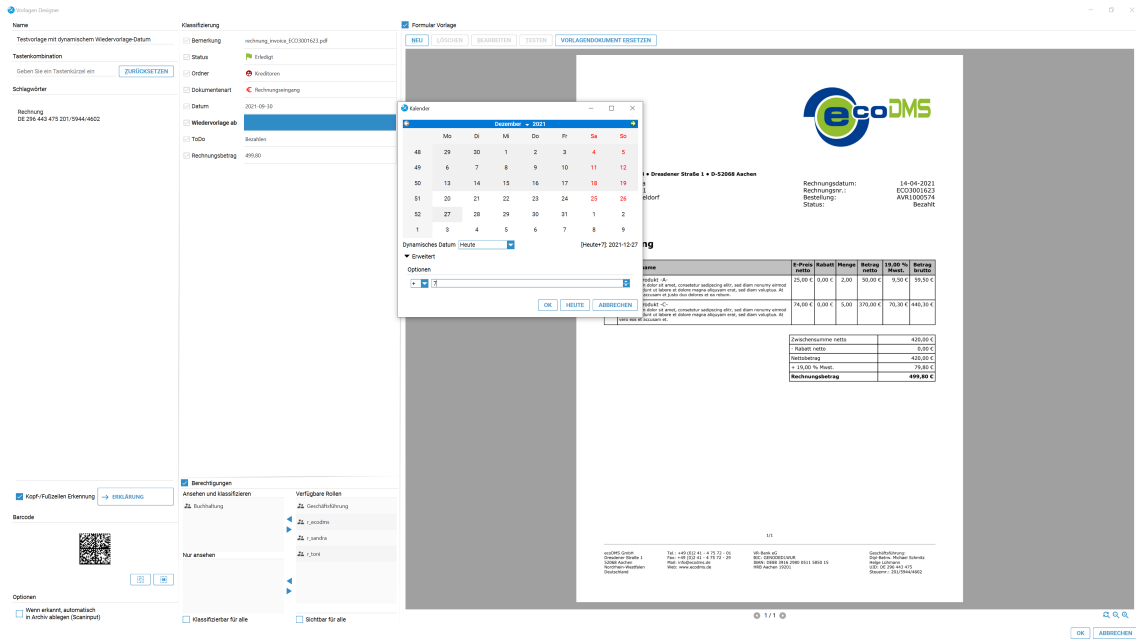
Figure 11.7: Templates Designer - Set Dynamic Date for Resubmissions (Here: TODAY + 7 days)
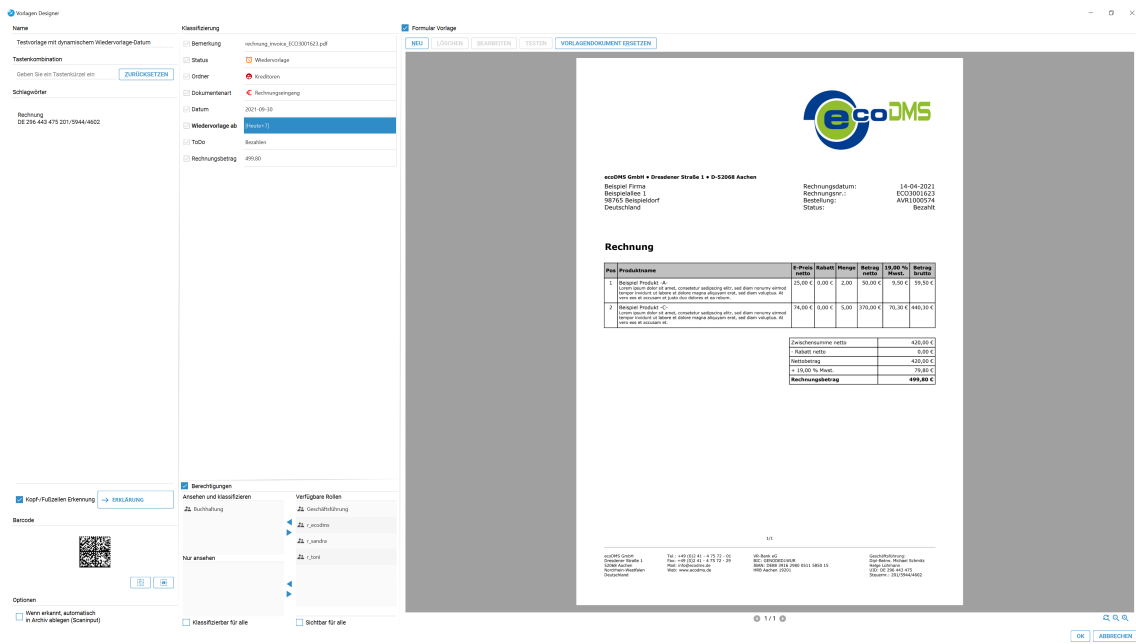
Figure 11.8: Templates Designer - Dynamic Date for Resubmissions Inserted (Here: TODAY + 7 days)

11.5 Barcodes

- Saving a template automatically generates a barcode. The barcode contains the name of the template and calls the template upon recognition.
- As a rule, barcodes are used for "returned documents", i.e. for documents created "in-house" which are returned signed. (Example: Delivery notes).
- Barcodes are read during the scanning process via the scaninput folder.

This is how you can find the barcode of a classification template:

1. Select a document in ecoDMS using one of the following options:

2. The following functions are available:

   a) **Toolbar:** Click the "Templates" icon

   b) **Classification dialog:** Click the "Templates" button

   c) **Template designer:** Open a template for editing

3. The barcode of a template displays in the overview of all classification templates and in the template itself. The following functions are available:

   a) **Export All Barcodes (only in the overview of all classification templates):** Saves all available barcodes as .jpg files to the selected folder:

      i. Select target folder

      ii. Start export

      iii. Barcodes are saved accordingly

   b) **Copy Barcode to Clipboard:** Copies the barcode of the selected classification template to the clipboard to be inserted into any writeable file.

   c) **Save Barcode As:** Saves the barcode of the selected classification template as .jpg file to the selected folder:

      i. Select target folder

      ii. Start export

      iii. The barcode is saved accordingly
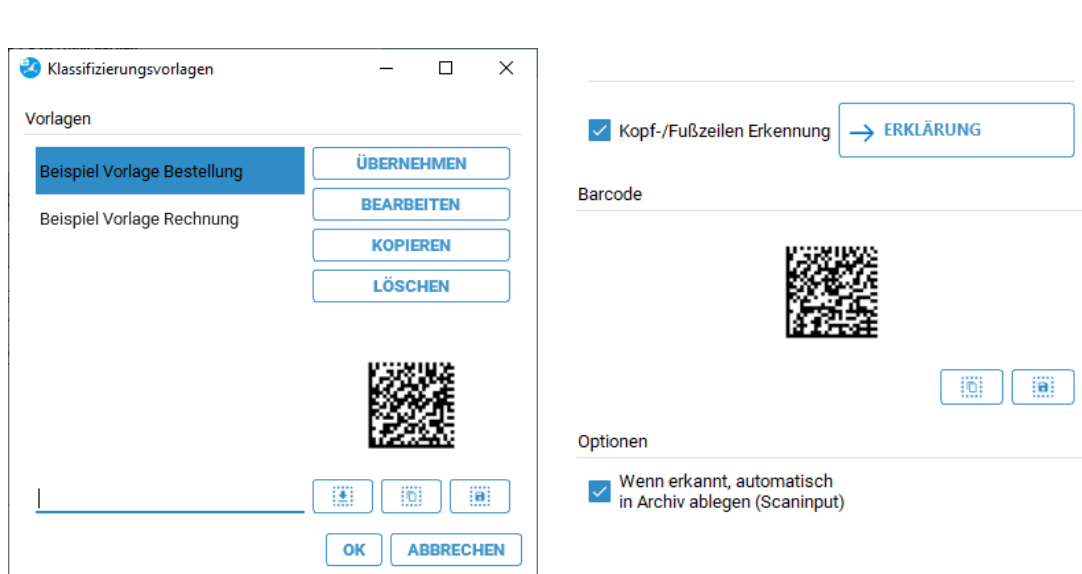
Figure 11.9: Template Designer: 2D Barcode

11.6 Dark Process: Automatic Archiving

- As an option, existing and successfully recognised classification templates can be processed in a dark process. In this case, users can archive the documents together with the matching classification information in ecoDMS, without having to do anything.

- This process is exclusively available for documents that have been retrieved via the "scaninput folder" and are successfully detected by the template designer.

- If ecoDMS detects several classification templates that have been assigned different target folders, the document is not automatically archived. It opens in the Inbox instead.

- This feature requires a licence of the ecoDMS full version but can be tested during the demo time. In the Free4Three version this function is not enabled.

To enable the Dark Process, complete the following steps:

1. Create a classification template with the ecoDMS Template Designer.

   a) If you want to activate the "Dark Process" for an existing template, you can open the template for editing and configure it accordingly.

2. To activate "automatic archiving", enable the checkbox "Automatically move to archive if detected" in the "Options" section of the Template Designer.

   a) Then select the "target folder".

3. Click the "OK" button to save the template.
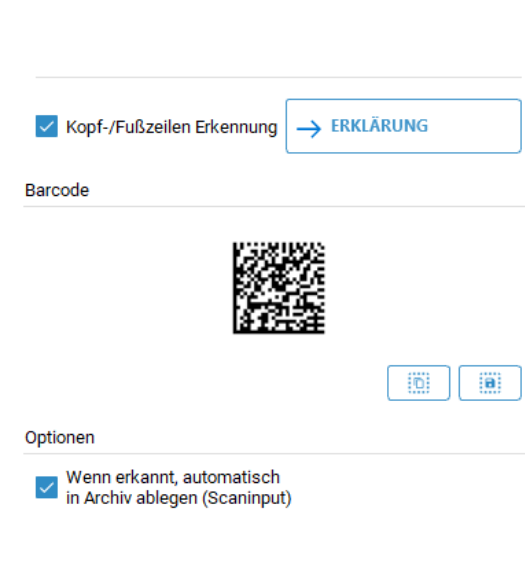
Figure 11.10: Template Designer: Automatically move to archive if detected

11.7 Switch Folder Recognition On / Off

The keywords deposited in the folder structure can also be used for automatic pre-classification. If a document is scanned and archived via the printer driver or via the Office Plugin, and no template is recognised, the document can still be assigned to the respective folder using the keywords. Folder recognition can be configured for each workstation.

1. Enter the appropriate keywords for the folders in the settings dialog (refer to the "Settings" chapter).

2. Open the Classification dialog to any document.

3. Right-click the Permissions window in the Classification dialog.

4. Click the "Options" function.

5. Enable or disable the function with the "Keyword Recognition (Folder)" checkbox.
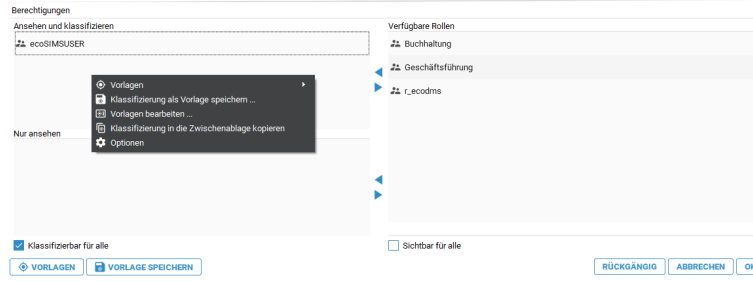
Figure 11.11: Classification - Permissions - Right Click
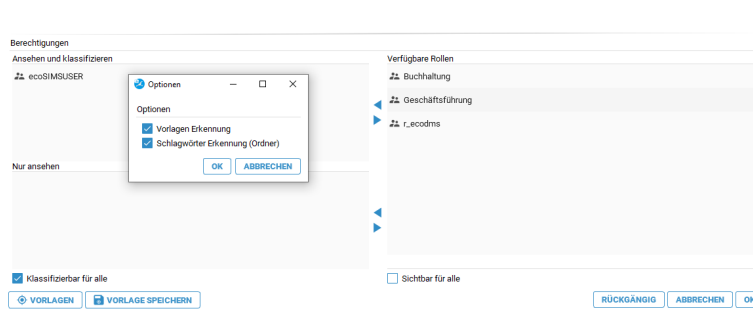
Figure 11.12: Classification: Switch on/off Folder and Template Recognition

11.8 Switch Template Recognition On / Off

Template recognition can be configured for the PDF/A Printer, email Plugins and Office Plugins on each workstation.

1. Open the Classification dialog to any document.

2. Right-click the Permissions window in the Classification dialog.

3. Click the "Options" function.

4. Enable or disable the function with the "Template Recognition" checkbox.
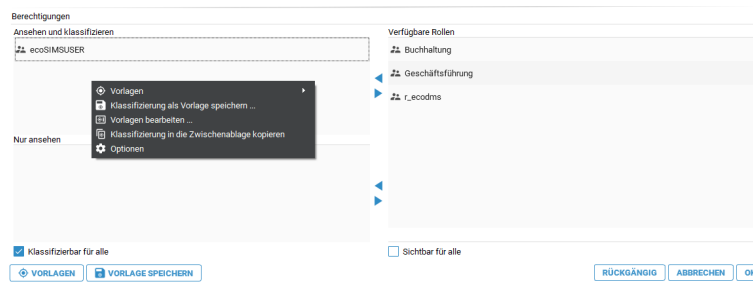
Figure 11.13: Classification - Permissions - Right Click
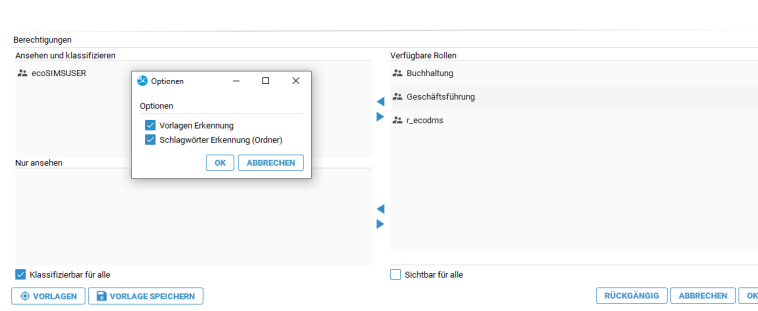
Figure 11.14: Classification: Switch on/off Folder and Template Recognition

12 Display, Download, Export, Preview)

You can open archived documents from ecoDMS and download (export) them.

12.1 Download

1. Select the documents in ecoDMS.
    a) Press and hold the CTRL key to select several documents at once

2. Select the "Download" function using one of the following options:
    a) **Table view:** Right-click one of the selected documents - Download
    b) **Toolbar:** "Download" icon
    c) **Menu:** File -> Download
    d) **Keyboard shortcut:** CTRL + E

3. A new window opens. Select the destination path for exporting.
    a) Enable the checkbox "Export as Zip-archive" in the dialog if you want to export data as ZIP-archive.
    b) Now name the Zip-archive.
    c) If you wish to take any markings into account when downloading, select the desired colors. Please read the explanations in this manual under 15.5.3.

4. Confirm your entry by clicking the "Open" button.
    a) Depending on the data volume the export may take some time.

Figure 12.1: Icon - Download
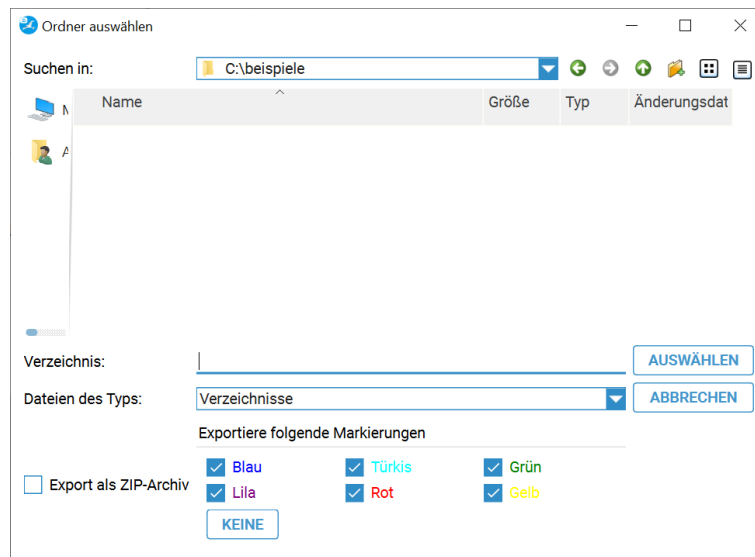
Figure 12.2: Download Documents from ecoDMS (here: incl. Markers)

12.2 Download via Drag and Drop

If you want to download documents, you can drag the documents from ecoDMS into the file system with the mouse (but you cannot move them!)

1. Click and press the left mouse button to select the documents in the table

2. Drag your selection to a location in your file system (e.g. on the desktop).

12.3 Reload Documents

When you start ecoDMS, documents and classifications are automatically retrieved and refreshed.

New files and classifications continually enter ecoDMS. To reload the overview of visible documents and classifications on your workstation, complete the following steps:

1. Toolbar: Click the "Reload" icon

Figure 12.3: Icon - Reload Documents

12.4 Open Documents

> **Open Single Document Directly:**
> - Table view: Double-click the DocID of a document
> - Card view: Double-click the preview of a document

To open documents in ecoDMS, complete the following steps:

1. Select one or more documents in ecoDMS.

    a) Press and hold the CTRL key to select several documents at once.

2. Execute the "Open" function using one of the following options:

    a) Menu: File -> Open

    b) Table view: Right-click -> Actions -> Open

    c) Card view: Actions tab -> View (Open Document)

    d) Keyboard shortcut: CTRL + S

Figure 12.4: Icon - Open Document(s)

12.5 Preview Pane

> - The preview only displays PDF documents.
> - Depending on file size and volume, it may take a while for the documents to display.
> - Please note that all settings for the document preview are saved to your workstation and not to your user profile.
> - Viewing a preview (table view + map view) requires a license of the ecoDMS full version, but can be tested within the demo version. This feature is not enabled in the Free4Three version.

ecoDMS has four types of document preview:

- Document preview in a tile (Card view)

- Document preview in a separate preview pane

- Document preview during classification

The preview pane is a separate pane in the ecoDMS client. It is not the preview in the card view or during classification, but a separate area in ecoDMS. You can enable and set up this area for each workstation. In addition to the simple card preview, the preview pane provides more features.

12.5.1 Show/Hide Preview Pane

> In the Table view, the separate preview pane usually displays automatically. In the Cards view, the separate preview pane is usually hidden.

You can show or hide the preview pane on your workstation in the Cards or the Table view. To do so, complete the following steps:

1. Right-click the ribbon of ecoDMS Client.

   a) The menu displays all available panes you can show and hide.

2. Enable "Preview" to show the preview pane.

   a) Disable "Preview" to hide the preview pane.
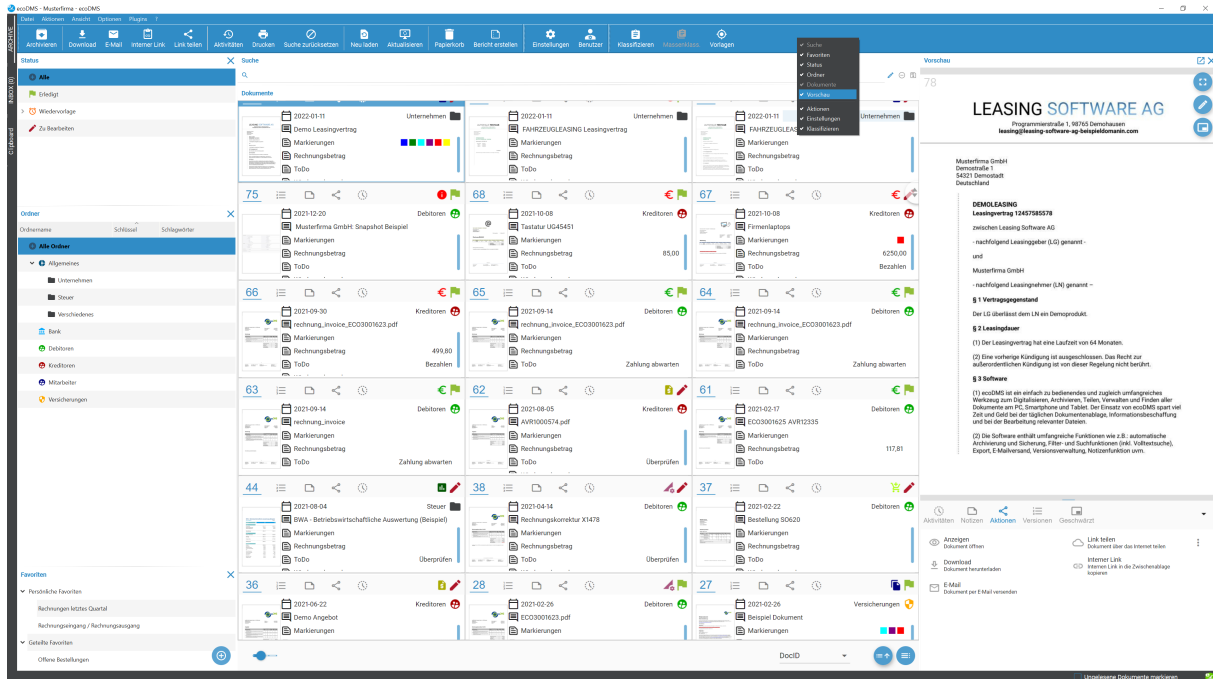
Figure 12.5: Show Preview Pane (here: in Addition to Cards View)

12.5.2 Scalability: Preview in Focus

> – Please note that these settings are saved to your workstation and not to the user profile.

If you want to have the document preview in focus, you can scale the preview pane on your workstation and minimize the feature area below the document preview.

12.5.2.1 Scale Preview Pane

You can scale the width and height of the preview pane. Use the mouse to move the boundaries between the upper preview and the feature tabs below up and down. Moreover, you can scale the width of the entire window (preview including feature area).

12.5.2.2 Minimize Feature Area (Tabs)

Minimize the tabs below the preview pane to make more room for the document preview. To do so, complete the following steps:

1. To do so, click the arrow in the ribbon of the feature area to minimize it.

2. Click the arrow again to maximize the feature area.
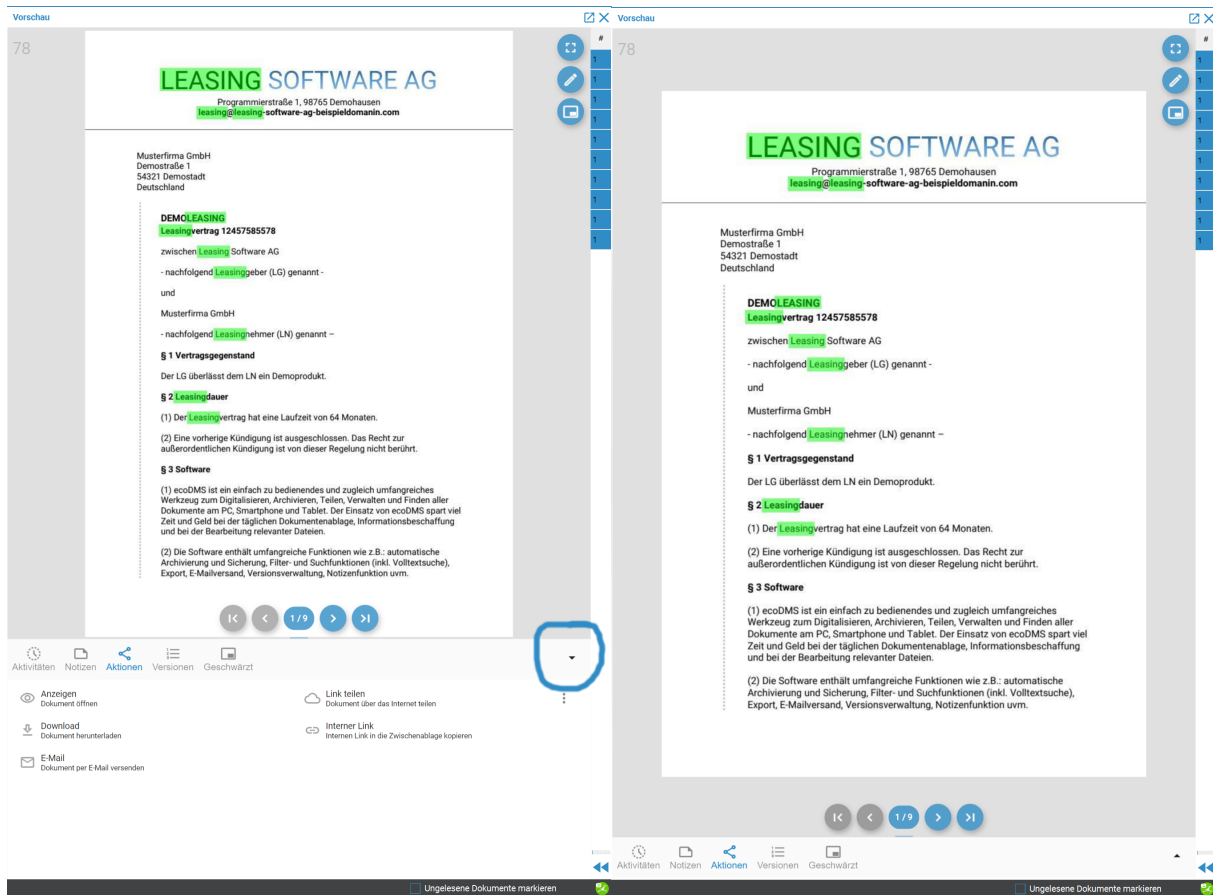
Figure 12.6: Preview Pane: Minimize / Maximize Feature Area

12.5.3 Load / No PDF Preview

– Please note that these settings are saved to your workstation and not to the user profile.

To load or close the preview pane for the PDF preview, complete the following steps:

1. Right-click the title bar of the "Preview" pane.

2. Click "Quality of Preview"
   a) Display preview: Enable "Preview" (check)
   b) Do not display preview: Disable "Preview" (uncheck)
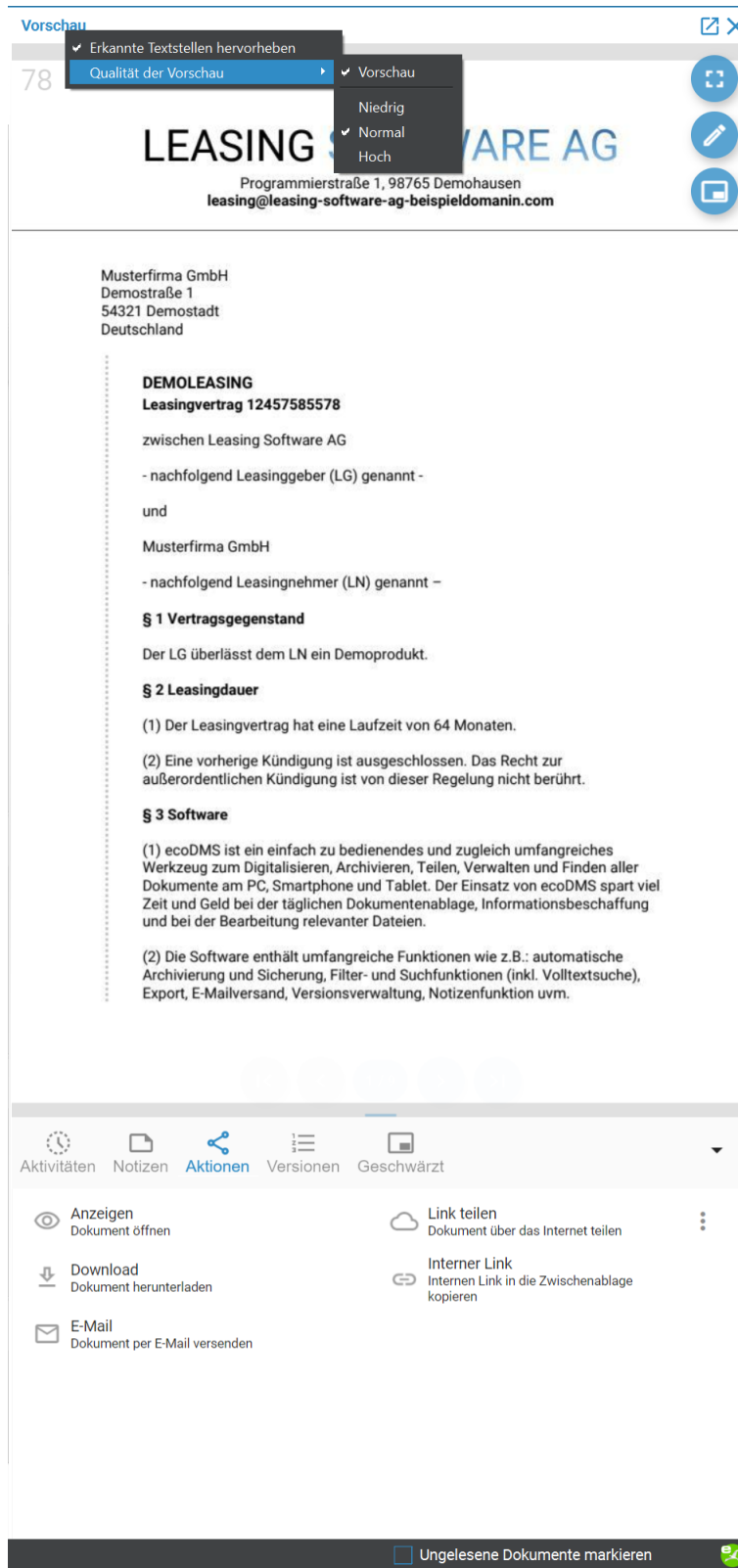
Figure 12.7: Preview Pane: Load Preview / No Preview

12.5.4 Preview Quality

– Please note that these settings are saved to your workstation and not to the user profile.

– The higher the quality, the better the document recognition process.

– Please note that a better quality slows down the loading time.

To configure the preview quality, complete the following steps:

1. Right-click the title bar of the "Preview" pane.

2. Click "Quality of Preview"

3. Select a quality. You can choose the following values:
   a) Low
   b) Normal
   c) High

Figure 12.8: Preview Pane: Quality of Preview

12.5.5 Highlight Recognized Text

> – Please note that these settings are saved to your workstation and not to the user profile.

In a full-text search, ecoDMS highlights the recognized search terms in the preview pane. If a keyword occurs multiple times within a document, ecoDMS also displays an overview of the text snippets containing the term in the preview pane. Click the mouse to skip to the required passages. To manage the setting, complete the following steps:

1. Right-click the title bar of the "Preview" pane.
   a) To enable "Highlight Search Results": Check
   b) Erkannte Stellen hervorheben deaktivieren: Uncheck
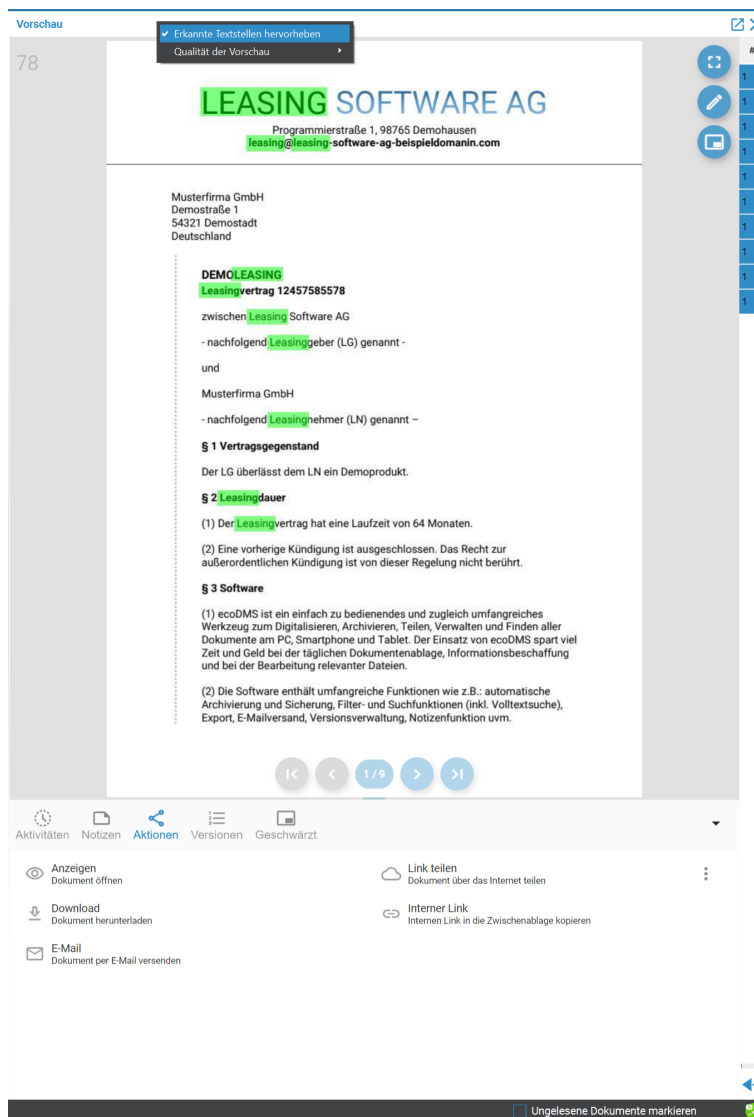
Figure 12.9: Preview Pane: Highlight Search Results

12.5.6 Zoom Preview

In the Preview pane you can zoom the displayed document.

– Zoom in and out by holding CTRL and scrolling up or down with the mouse.

12.5.7 Preview Full Screen

To view the preview in full screen mode, complete the following steps:

1. Click the Full Screen icon in the Preview window.

2. ecoDMS displays the preview in full screen mode.

    a) If a document has several pages, users can toggle from page to page.
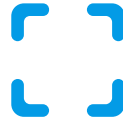
Figure 12.10: Icon - Preview Full Screen

12.6 Data Export Plugin

- Only users (administrators) with the ecoSIMSAdmin role / permission can access this function. For all other users this function is not visible.
- When exporting data, the administrator can export all documents regardless of their permission.
- The documents are exported with all associated information and versions.
- The exported files are saved as ZIP files.
- The export duration depends on the technical system environment and the data volume.
- A complete and clean export process always takes some time.
- An offline reader is also exported to retrieve and view the documents offline" (without a connection to ecoDMS).
- This function requires a license for the full version of ecoDMS but can also be tested in the trial version. This function is not enabled in the Free4Three version.

Use the data export plugin, which is integrated in ecoDMS by default, to export and save selected documents and their classification attributes to any data carrier.
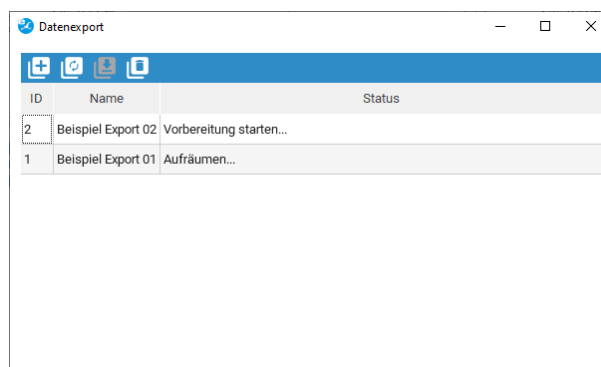
Figure 12.11: Plugin: Data Export

12.6.1 Open Plugin

The data export plugin is integrated in ecoDMS. Click the following menu items to load the plugin:

1. Menu: Plugins -> Data Export -> All Data Exports

12.6.2 Select and Download Data

1. Open data export:
    a) Menu: Plugins -> Data Export -> All Data Exports
    b) Menu: Plugins -> Data Export -> Create New Export

2. Select the "Create New Export" function using one of the following options:
    a) Menu: Plugins -> Data Export -> All Data Exports -> Create New Export (icon in the data export window)
    b) Menu: Plugins -> Data Export -> Create New Export

3. Enter the "export criteria"
    a) This operation is the same as the "Advanced Search"
    b) You can also choose from the saved favorites
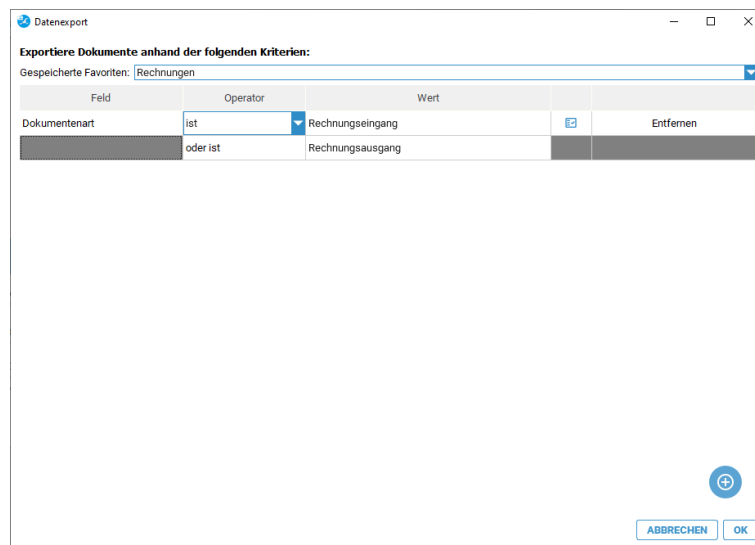
Figure 12.12: Plugin: Data Export - Enter Criteria

4. Assign a name to the "export" and click "OK" to continue.
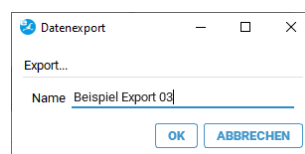
Figure 12.13: Plugin: Data Export - Assign Name for Export

5. Now switch to the data export window.
    a) This window displays all available exports.
    b) It may take some time for ecoDMS to read in the files and prepare them for "export". The wait time depends on the data volume.
    c) During preparation, you can call the current status manually with the "Update Export Status" icon. The available statuses are:
        i. Start preparation...
        ii. Prepare database...
        iii. Prepare files...
        iv. Preparation complete.

   v. Packing data...

   vi. Clean up...

   vii. Ready for download.

  d) You can start exporting when the status "Ready for download" displays.

6. Click the "Start Export Download" icon.

7. A dialog opens. Select the language for the installation and confirm your selection.

8. The export is executed.

  a) The duration depends on the data volume.
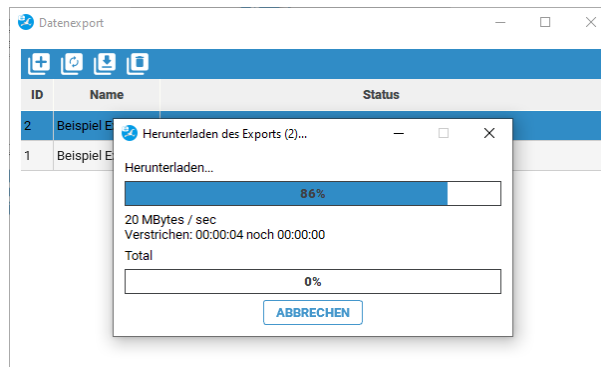
Figure 12.14: Plugin: Data Export - Download Process
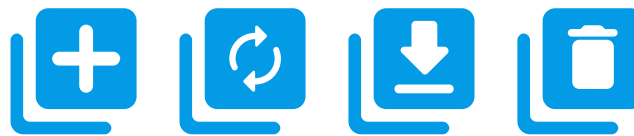
Figure 12.15: Data Export Icons (From Left to Right):
    Create New Export - Update Export Status - Execute Export Download - Remove Export from List

12.6.3 Remove Export from List

To delete a request for data export from the list, complete the following steps:

1. Select the desired export in the Data Export window.

2. Click the "Remove Export from List" icon.

3. Confirm the confirmation prompt.

4. You have now deleted the "Export" request.

Figure 12.16: Icon - Remove Export from List

12.6.4 Access Exported Documents

After the Data Export ecoDMS deposits a "ZIP file" in the selected destination folder.

1. Unpack the zip file.

2. Click through the folders until you find the "Archives" folder.
   a) This is where all exported documents / files and versions (if available) are archived.
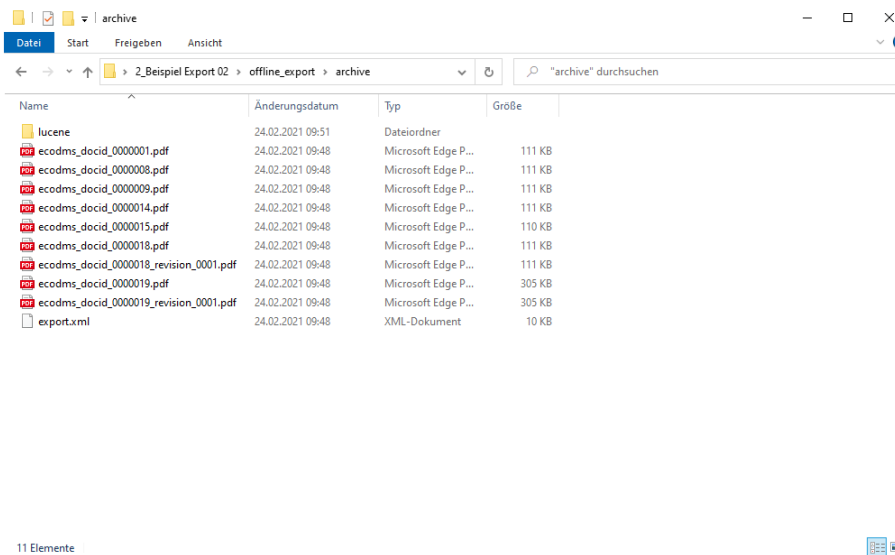
Figure 12.17: Plugin: Data Export - File System - Offline Export - Archive

12.6.5 Access XML Information

The Data Export also creates a XML file named "export.xml". The file includes all available classification and version information to the exported documents.

1. Unpack the zip file.

2. Click through the folders until you find the "Archives" folder.
   a) Here you will find the XML-file including all information.
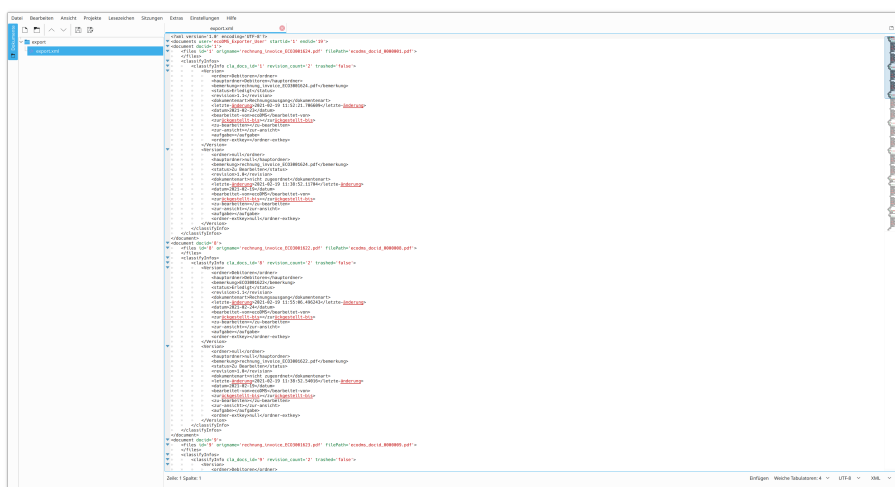
Figure 12.18: Plugin: Data Export - XML File (Example)

12.7 Offline Client

- The executable file "ecodmsclient.exe" to start the ecoDMS Offline Client is located in the "offline_export" folder.
- You can only start the offline client under Windows.
- This function requires a license for the full version of ecoDMS but can also be tested in the trial version. This function is not enabled in the Free4Three version.

The data export plugin automatically saves an offline client. You can use the offline client under Windows and execute simple standard searches (full text search, status, folder). This client does not require access to ecoDMS Server. You can copy the entire folder, which was created when exporting data, to any data carrier to allow external access to the exported documents without login and without an ecoDMS installation.

12.7.1 Start Offline Client

After the Data Export ecoDMS deposits a "ZIP file" in the selected destination folder.

1. Unpack the zip file.

2. Click through the folders to the folder which contains the "ecodmsclient" application.

3. Double-click the ecoDMS file to start the offline client.

   a) Now all common search functions, structures and exported documents are available offline.
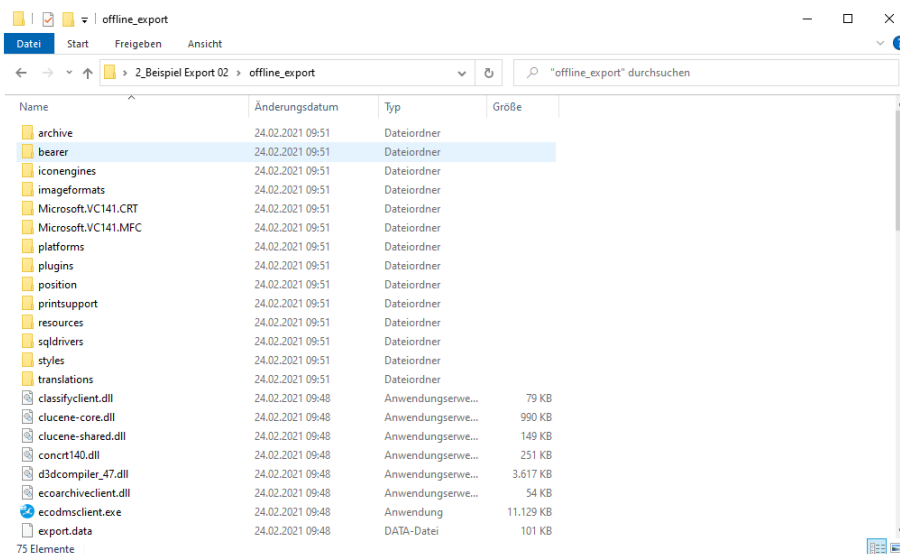
Figure 12.19: Plugin: Data Export - Filesystem - Unzipped File
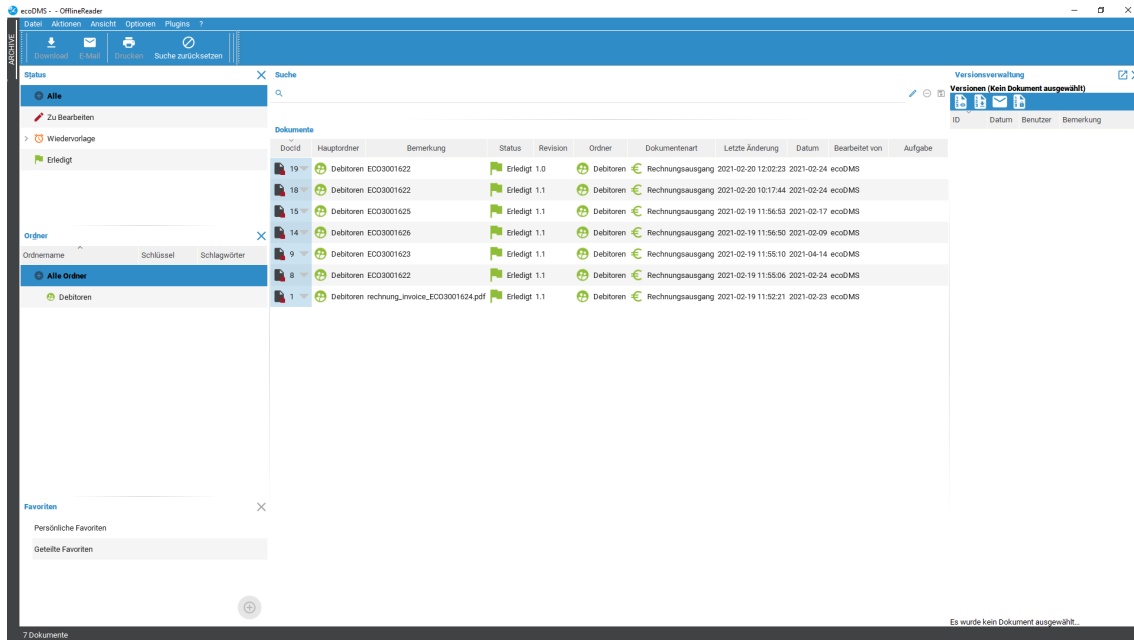
Figure 12.20: Example for an ecoDMS Offline Client (Data Export Plugin)

13 Search, Filters and Favorites

To retrieve the archived documents and information, ecoDMS has various search and filter options. You can save recurring search queries as favorites.

- By default, the system uses optical character recognition (OCR) on all text documents. This functionality is firmly built into ecoDMS.
- In addition, ecoDMS converts unreadable data such as not read PDFs, JPGs, PNGs and TIFFs (if possible) automatically into readable PDF/A files. Therefore, text from these files may also be included in the full-text search.
- There are, for example search queries using the full text recognition, searches within the generated folder structure and on the basis of the stored classification and notes information possible.
- ecoDMS recognises the content depending on the document resolution, format and quality.
- ecoDMS simultaneously indexes the meta data, classification attributes and notes.
- The documents and information must be readable for the system.
- Please note that we cannot guarantee 100 percent accuracy. The recognition depends on the contents and quality of your documents, information and files.

13.1 Full-Text Search

- If a document preview exists for a retrieved file, the recognised words are highlighted in Color in the preview window.
- If a keyword occurs several times within a document, ecoDMS also gives an overview of all occurrences of the keyword in the preview window (also refer to "Display - Preview").

For more information, refer to "Display - Preview" in this manual.

Use search terms to perform a quick search of the contents, metadata, classification attributes and notes of the archived documents with the full-text search of ecoDMS. You can only do this if the documents and information you are searching for are readable for ecoDMS. A 100 percent accuracy cannot be guaranteed. There are several "techniques" for the full-text search. For example, in addition to simple search terms, you can use wildcards like the asterisk (*) and other operators. This chapter contains a detailed list of the most important options for the full-text search:

13.1.1 Simple Full-Text Search

1. Enter the words you are looking for in the ecoDMS search box. For example:

```
Invoice example company
```

2. Confirm your entry with the "Enter" key.

   a) ecoDMS displays all matches with the same notation as the words you entered in the search.
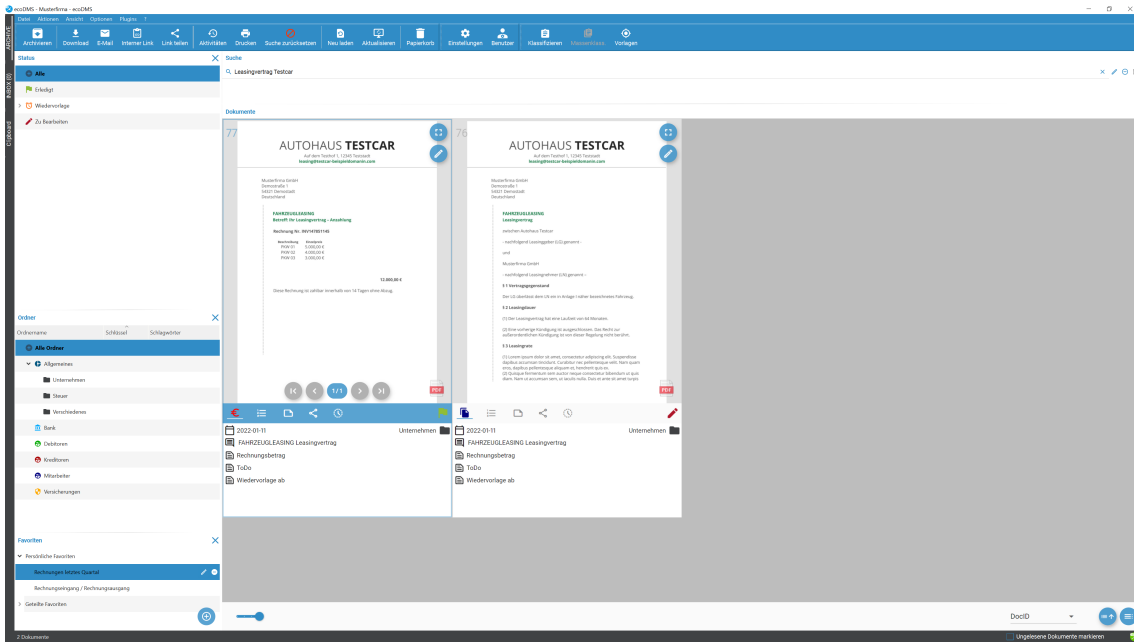
Figure 13.1: Example of a Simple Full-Text Search (Card View)
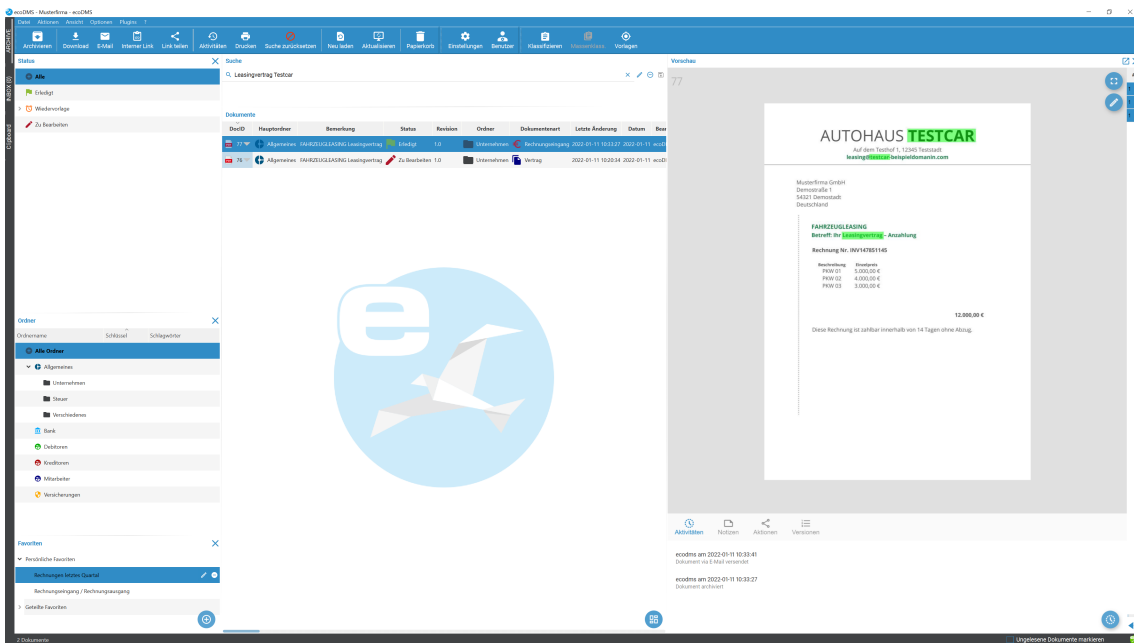
Figure 13.2: Example of a Simple Full-Text Search (Table View and Activated Preview Window)

13.1.2 Wildcard Search

Wildcards are placeholders and are represented by a question mark (?) or an asterisk (*).

1. Enter one or more words that are contained in the file you are searching for. To do so, use wildcards.

   a) **Question mark (?):** This character replaces a letter and is used if, for example, the notation is unclear. For example:

   ```
   Me?er
   ```

   i. In this case, ecoDMS, for example, searches for words like "Mejer", "Meier", "Meyer"... . .

b) **Asterisk (*):** Enter the asterisk if more values are to follow the entered values. For example:

```
Test*
```

    i. In this case, ecoDMS searches for words starting with "Test" with any ending (e.g. testing, test-interval, tester...).

2. Confirm your entry with "Enter".

    a) ecoDMS displays all results that match the search and contain all content.
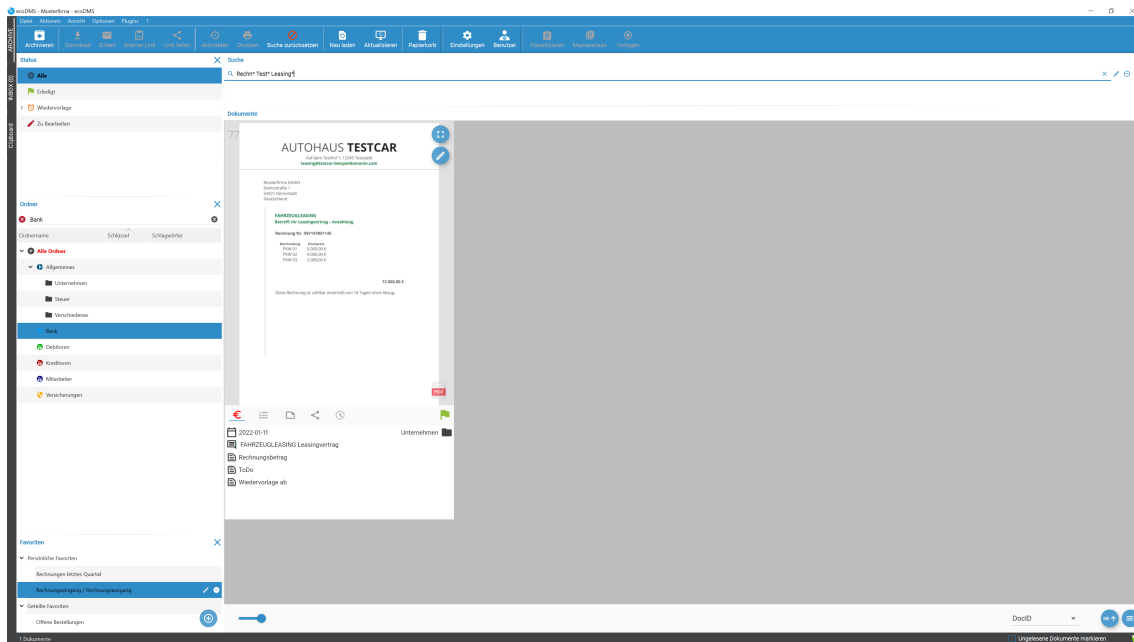
Figure 13.3: Example of a Wildcard Full-Text Search (Card View)

13.1.3 Fuzzy Search

This function is a "fuzzy search". If a simple full-text search does not return the required result, we recommend this search function as an alternative.

1. Enter one or more words that are contained in the file you are searching for. To do so, use "fuzzy logic" technology.

    a) **Tilde character (~):** Place the tilde character **at the end** of a word and perform a fuzzy search to search for words that are similar to the entry. For example:

```
Meier~
```

    i. The search now focuses on documents which, for example, contain words like "Meier", "Meyer", "Maier".

2. Confirm your entry with "Enter'.

    a) ecoDMS displays all results that match the search and contain all content.
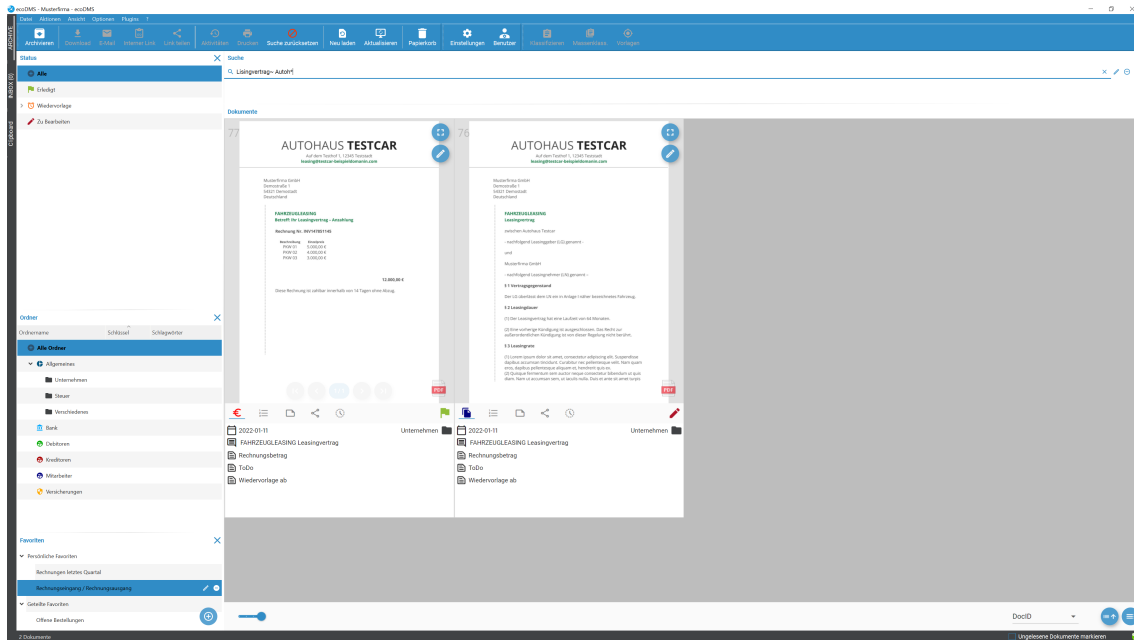
Figure 13.4: Example of a Fuzzy Full-Text Search (Card View)

13.1.4 Boolean Operators

Use "Boolean factors" to create various operators such as AND, OR, +, - . Enter operators in capitals for searching in ecoDMS.

1. Enter one or more words that are contained in the file you are searching for. To do so, use "boolean operators" technology.

   a) **OR:** Connect two words with this command to search either for one or the other word. For example:

   ```
   Sample OR Demo
   ```

      i. This search entry searches for files that contain either the word "Sample" or the word "Demo".

   b) **NOT / - :** Use these commands if you want to search for a file which does not include a specified word. Use either the value "NOT" or the value "-". Place the minus symbol directly before the word you want to exclude. For example:

   ```
   Sample NOT Demo
   ```

   ```
   Sample -Demo
   ```

      i. These search entries search for files that contain the word "Sample" but not the word "Demo".

   c) **AND / + :** These commands are used for an AND operation. The search terms connected with AND are all be contained in the file. You can either use the value "AND" or the value "+". Place the plus symbol directly before the words you want to include in the search. For example:

   ```
   Sample AND Demo
   ```

   ```
   +Sample +Demo
   ```

   d) This search entry searches for files that contain the word "Sample" and the word "Demo".

      i. **If you only enter search terms, without using +, -, OR or AND, the search terms are connected with AND.**

2. Confirm your entry with "Enter" or click the "Search" button to start the search.

a) ecoDMS displays all results that match the search and contain all content.
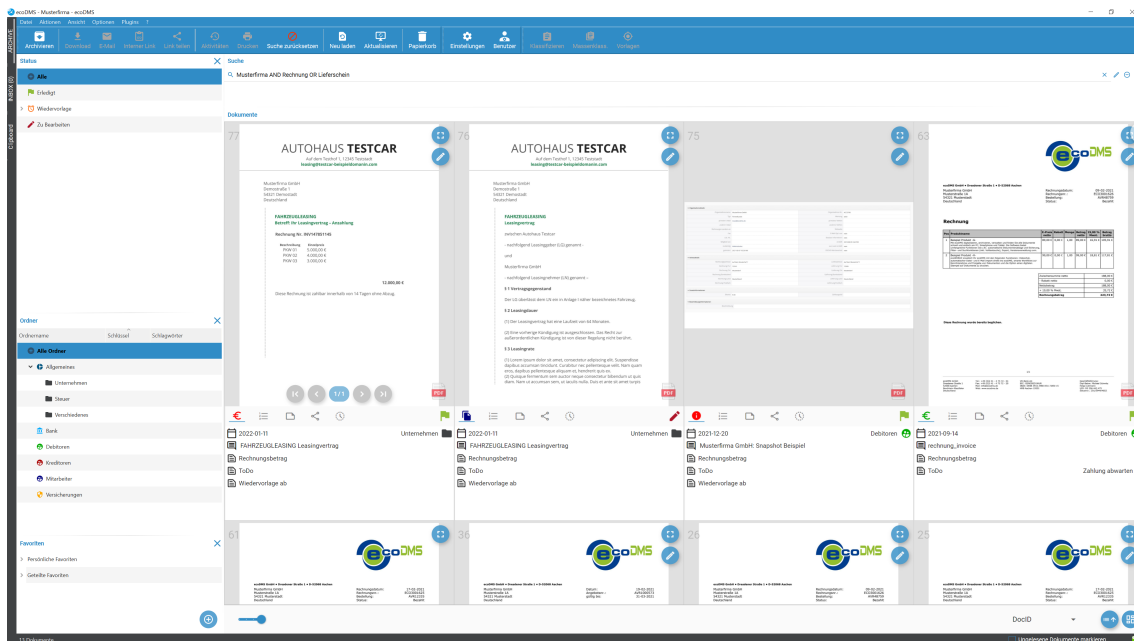
Figure 13.5: Example of a Boelean Full-Text Search (Card View)

13.2 Advanced Search

The Advanced Search allows you to use a variety of values for your search query in ecoDMS. You can use all available classification attributes, highlight colors (PDF Editor) and the full-text search.

13.2.1 Enter Search Criteria and Start Search

1. Click the Edit icon to the right of the search box to open the Advanced Search dialog (dialog name: Edit Search)

2. Enter your search criteria. The following fields are available:

   a) **Field:** Displays all searchable attributes and values you can select. Select an entry from the list.

   b) **Operator:** Specify the operator for the search. Depending on the field, the operators you can select vary. The following operators are available:

      i. contains

      ii. does not contain

      iii. greater / equal

      iv. greater than

      v. is

      vi. is not

      vii. smaller / equal

      viii. smaller than

   c) **Value:** Defines the search criterion in detail. Select from the values belonging to the "field" (e.g. the folder tree or a list of all document types)

   d) **Icon (Multiple Selection):** Depending on the attribute, this function allows you to select several values and inserts them as OR operation into the search query

      i. In the multiple selection dialog, click "Add value" to add further values in the form of an OR operator

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

> Example multiple selection:
> Search for the document type "Incoming Invoice" **OR** "Outgoing Invoice" **OR** "Invoice Correction".

3. To add more search criteria, click the "Add Criterion" button. ecoDMS then inserts a new row for your search query. This is an "AND" operator.

> Example for combining several rows with the AND operator:
> **Row 1:** Search for the document type "Incoming Invoice" OR "Outgoing Invoice" OR "Invoice Correction".
> **AND**
> Row 2: Status of the document is "To Do"
>
> Results: ecoDMS only displays documents whose document type is **either** "Incoming Invoice" **or** "Outgoing Invoice" **or** "Invoice Correction" **or** whose status is "To Do".

4. Click "OK" to start the search. To cancel, click "Cancel".
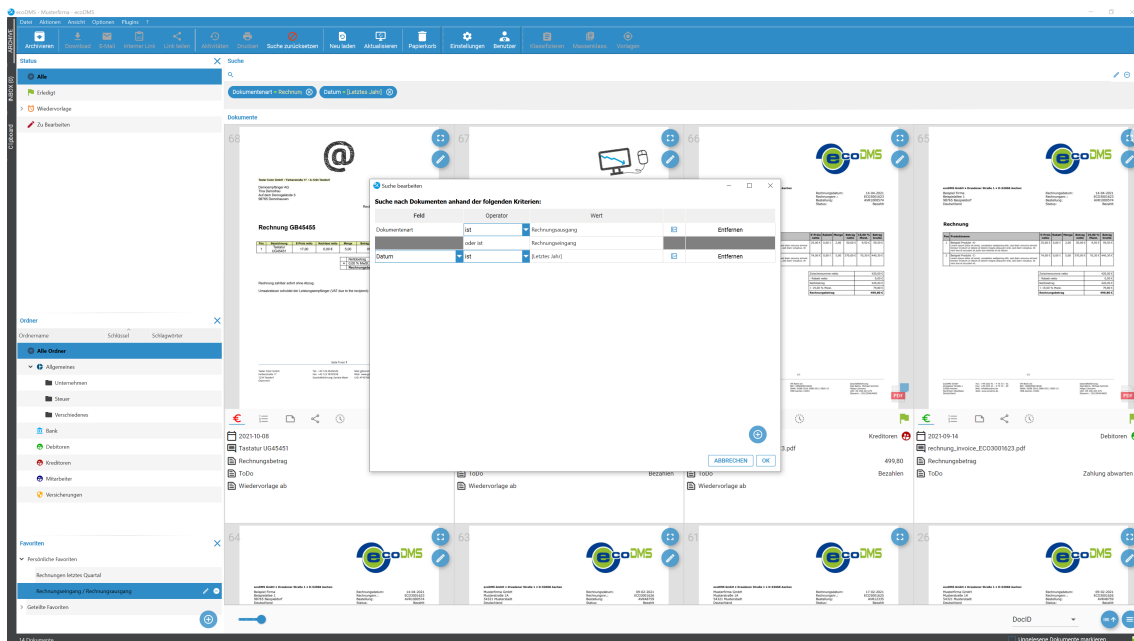
Figure 13.6: Advanced Search - Example for Assigning Search Criteria (AND + OR Operators)

13.2.2 Remove Search Criteria

1. Open the Extended Search dialog.

2. Select the search line you want to delete.

3. Click on the corresponding "Remove" button.

13.3 Favorites

You can save recurring search queries as favorites. Click a favorite to search with the saved criteria. The favorites are saved by default for personal use in the "Personal Favorites". Administrators can also create and save global search queries. These

are shared with specific users or groups in the "Shared Favorites". In addition, you can use the favorites as a basis for data export and load them in the Data Export plugin dialog.
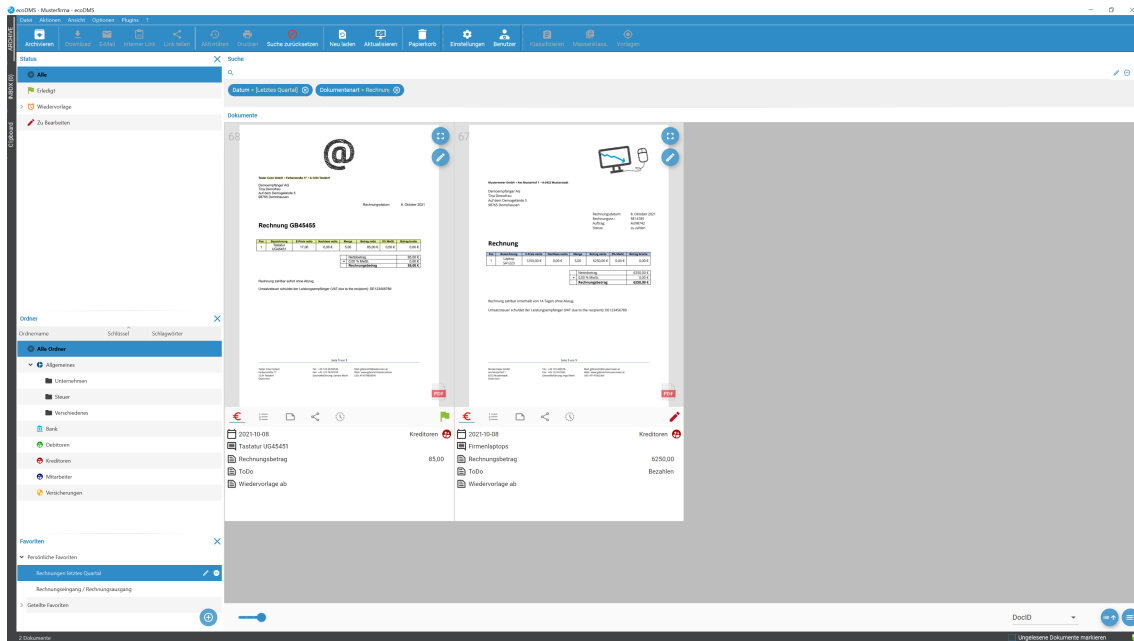
Figure 13.7: Favorites - Saved Search Queries

13.3.1 Personal Favorites

Create a search query using one of the following steps:

1. Click the Edit icon to the right of the search box to open the "Edit search" dialog

    a) In the "Favorites" window, click the "Create New Favorite" icon to open the "New Favorite" dialog

    b) Enter the search criteria as described for the Advanced Search

2. To confirm your entry, complete the following steps:

3. **Via the Edit icon ("Edit Search" dialog)**

    a) Click "OK" to start the search

        i. Now click the "Save as Favorite" icon to the right of the search line

    b) **Via the Favorites window ("New Favorite" dialog)**

        i. Click "Apply" or "OK"

4. Now enter a name under which you want to save the favorite

5. Confirm your entry with "OK" to save the entry in the "Personal Favorites", or abort the process with "Cancel"

13.3.2 Shared Favorites

Administrators can create search queries and make them available as shared favorites to specific users or groups.

1. In the "Favorites" window, click the "Create New Favorite" icon to open the "New Favorite" dialog

2. Enter the search criteria as described for the Advanced Search

3. Enable the checkbox for the "Show permissions" area

4. Drag the users and/or groups, with whom you want to share the search query in the "Shared Favorites", into the "Assigned Roles" area

5. Click "Apply" or "OK" to confirm your entry

6. Now enter a name under which you want to save the favorite

7. Confirm your entry with "OK" to save the entry in the "Personal Favorites" for the selected users / groups, or abort the process with "Cancel" without saving

13.3.3 Edit Favorites

– You can edit personal favorites.

– Shared filters can only be edited by the responsible administrator.

1. Select an entry in the "Favorites" window

2. Click the "Edit Favorite" icon

3. Make your edits

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

13.3.4 Delete Favorites

– You can delete personal favorites.

– Shared filters can only be deleted by the responsible administrator.

1. Select an entry in the "Favorites" window

2. Click the "Delete Favorite" icon

3. Confirm the "Delete Favorite" message box with "Yes" or abort the process with "No"

13.4 PDF Highlight Tracking

Use the Advanced Search to find documents with highlight colors that were created with the PDF Editor. You can include the highlight colors when you open the search. For more information, please read the short description in this manual in section 15.5.4.

13.5 Dynamic Date Search

To allow a simplified, date-based search, ecoDMS provides predefined searches in Advanced Search and Favourites Search.

You can select the following parameters for the search:
- Yesterday
- Today
- Tomorrow
- Last Week
- This Week
- Next Week
- Last Month
- This Month
- Next Month
- Last Quarter
- This Quarter
- Next Quarter
- Last Year
- This Year
- Next Year

To include the dynamic date search in your search query / favourites, complete the following steps:

1. Open the Advanced Search window or the Favourites window.

2. Select the "Date" field and an operator (default: "IS")

3. Click into the"Value" box.

4. The calendar opens

5. In the "Dynamic Date" field, select a parameter from the drop-down list

6. ecoDMS now highlights the selected period in Color in the calendar

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

8. ecoDMS saves the selected parameter as a value, which you can use for a search

   a) If you save the dynamic date search as a favourite, ecoDMS automatically adjusts the selected period
   b) Periods, e.g. the last quarter, always remain up-to-date when using a favourite
   c) If, for example, you use the filter "Last Quarter"
      i. in April, ecoDMS displays the results from January to March
      ii. in August, ecoDMS displays the results from April to June
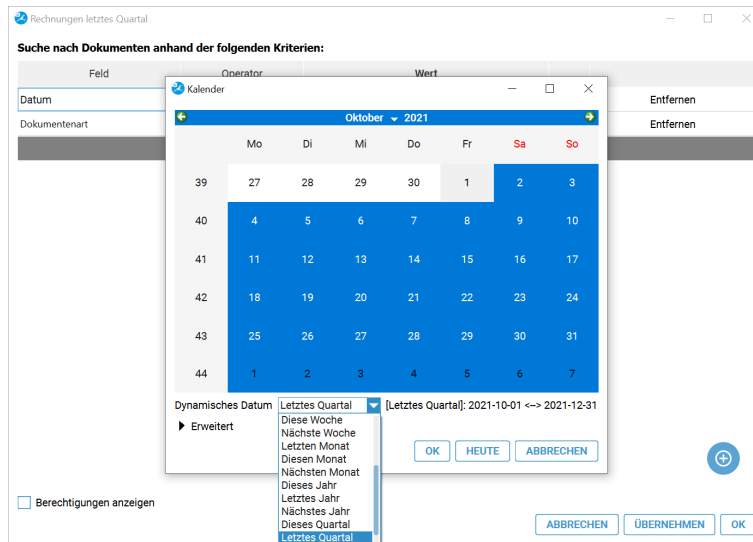
Figure 13.8: Dynamic Date Search: Select Parameters
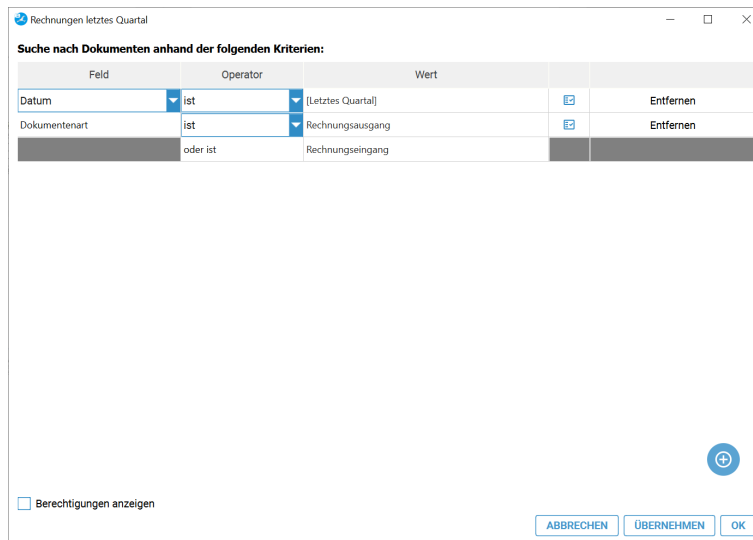
Figure 13.9: Example of a Favourite with Dynamic Date Search (Here: Invoices From the Last Quarter)

13.6 Shortcut Search

Use a user-defined keyboard shortcut in the Connection Manager to start the full-text search from any application (e.g. from a webpage, an enterprise resource planning system, an email, etc.). To do so, simply highlight the search terms in the corresponding programme and then enter the user-defined keyboard shortcut. Entering the shortcut automatically starts the full-text search in ecoDMS. The system searches through the archived documents for the selected terms. The matching documents immediately display in ecoDMS.
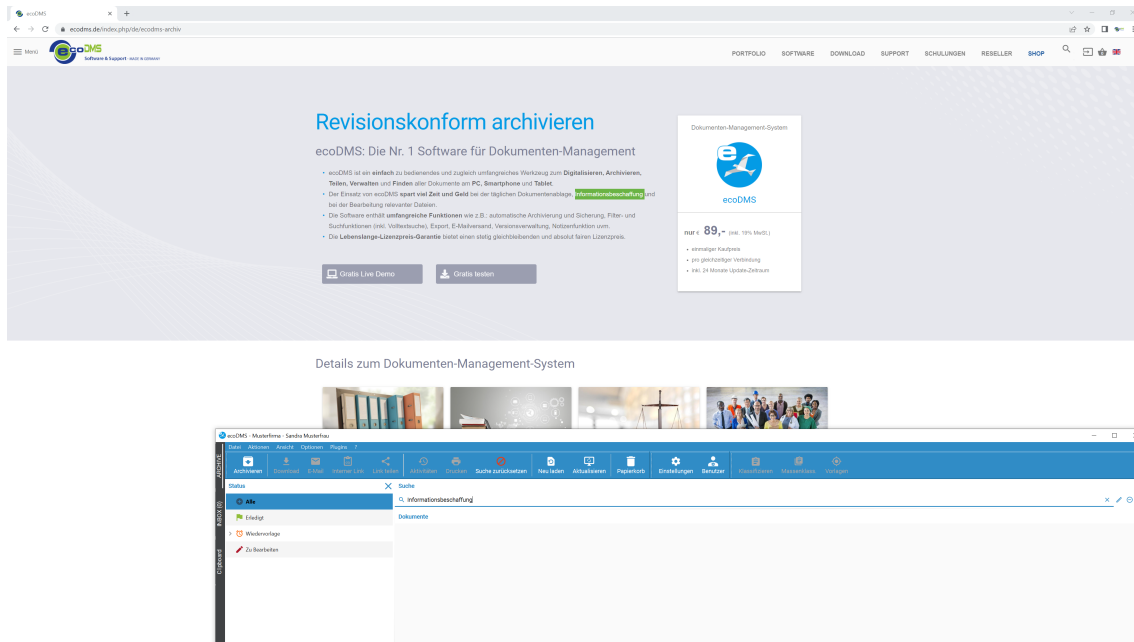
Figure 13.10: Example of a Shortcut Search:
Select the word (here german) "Informationsbeschaffung" on a web page and use the "CTRL + Alt + G" shortcut to transfer it to ecoDMS for a full-text search

13.6.1 Change Shortcut

You can create an individual shortcut for each profile in the Connection Manager. Complete the following steps:

1. Open the Connection Manager.

2. Enter the desired shortcut in the "Shortcut Search" field.

3. Save the profile.

13.6.2 Reset Shortcut

To reset your shortcut, complete the following steps:

1. Open the Connection Manager.

2. Click "Reset" in the shortcut line.

   a) ecoDMS clears your input, so you can enter a new shortcut.

3. Save the profile.

13.6.3 Execute Search Shortcut

1. Select a search term (e.g. on a website, in the enterprise resource planning system, etc.)

2. Type in the ecoDMS shortcut you specified

3. The selected search term populates the full-text search in ecoDMS

13.7 Filter by Status

You can filter documents by status in the "Status" window in ecoDMS.

- For example, if you click the "To Do" status, only documents with this status display.

– **You can combine this filter with more filters in any way you like.**

13.8 Filter by Folder

You can filter documents by folder in the "Folders" window in ecoDMS.

–

The system has the following default statuses:
 – **All: Displays all results, regardless of their status, and overrides any filters that may have been set in the status window**

 – **Done: Displays results with the status "Done" set in the classification**

 – **Resubmission: Displays results with the status "Resubmission" set in the classification**
  – **Expired: Displays results with the status "Resubmission" set in the classification and whose resubmission date has already been reached or has expired**
  – **Next 7 days: Displays results with the status "Resubmission" set in the classification and whose resubmission date lies within the next 7 days**

 – **To do: Displays results with the status "To Do" set in the classification**

For example, if you click the fictitious main folder "Debtors", all documents assigned to this main folder display. This also includes documents from the associated subfolders.

– **You can combine this filter with more filters in any way you like.**

 – **All folders:** Displays all results, regardless of their folder association, and overrides any filters that may have been set in the folder tree
 – You can also search for folders within the folder tree (refer to the chapter Browse Folder Tree)

13.8.1 Browse Folder Tree

You can browse the folder tree almost everywhere:
 – "Folder" window
 – Classification dialog
 – Table view
 – Settings…

The folder tree can contain various values. As an option, you can assign individual keys and keywords to each folder. If you are looking for a folder, you can use the folder name, the key and the keywords as search criteria. To do so, you have the following options:

1. Simply enter the search term anywhere within the folder tree. It can consist of letters and/or numbers.

2. An input field appears in the overview. When you start entering your search term, the system automatically suggests matching documents. The search includes folder names and their keys, as well as keywords.

3. You can continue the folder search with "F3".
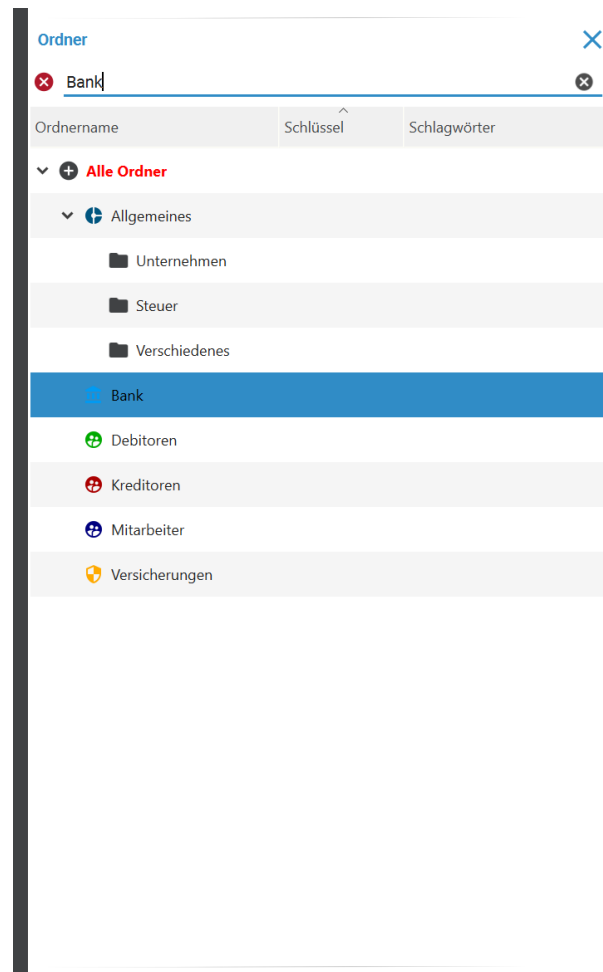
Figure 13.11: Window - Select Folder (Search)

13.9 Stop Search Query

- You can delete search criteria specified in the "Search" area by clicking the "Delete search" icon.
- Remove text in the full-text search of the "Search" area by clicking the "x" to the right of the search terms (Function name: Delete Text, only visible if entries are in the search box)
- To reset all active filters (e.g. full-text search + status + folder), click the "Reset search" icon on the toolbar

Figure 13.12: Icon - Delete Search (to the Right of the Search Box)

Figure 13.13: Icon - Reset Search

14 Document Versions

ecoDMS allows you to archive any number of document versions. This means that the original persists. As an option you can add a comment to each version.

- To access version control (ecoSIMSVERSIONING), you require a system permission.
- Editing, writing a version note and creating further versions is only possible if you have permission to classify this document.
- Please note that you cannot create further versions of a finalised document.
    - A document must be enabled for versioning from the beginning.
- Each version is stored individually within version control.
- The latest or finalised version always opens and displays in the preview
- Original files and any available PDF/A files can be stored in the version control
    - PDF/A files are automatically created when archiving PDF, TIFF, JPG and PNG files
    - Moreover, the ecoDMS Office and email plugins generate a PDF in addition to the original file during archiving
    - ecoDMS opens the PDFs (if available) and displays them in the preview
    - The quality and size of a file determine the duration and feasibility of the conversion to the PDF/A format
    - After successful conversion, users can access both the original and the searchable PDF/A through version control

---
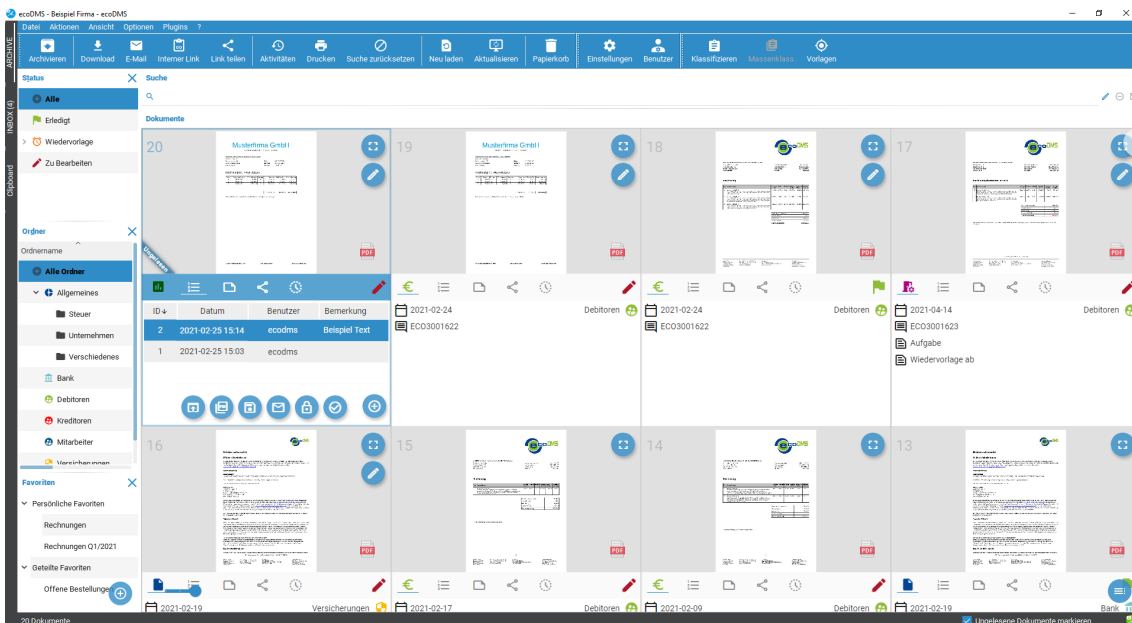
Figure 14.1: Versions of a Document (Here: Card View)

14.1 Create Initial Version

Please refer to the chapter "Archiving -> Archive File(s) as Version".

14.2 Add New Version

To add a new version to the document, ecoDMS provides various options:

1. Select the respective document in ecoDMS
   a) Click the "Add New Version" icon on the "Versions" tab
   b) Select a file in the file system and click "Open"

2. If the document was archived with an Office plugin, complete the following steps:
   a) Select the respective document in ecoDMS
   b) On the "Versions" tab, click the version you want to edit
   c) Now edit the document in Office and save it in Office with the ecoDMS button (refer to the corresponding plugin chapter in this manual for more details).

14.3 Comment

You can add comments to each version. You can create these short texts either directly through version management or - when archiving via the Office Plugins - through the classification dialog.

1. 1. Select the respective document in ecoDMS 2. Click to select the "Comment" field for the version you want to comment on 3. Enter the comment 4. Confirm your entry with "Enter"

14.4 Open Version

Users can access files and the individual versions if they have the permission to access the file and Version Management. Depending on the file, the versions are available in the original and in PDF/A format.

1. Select a document

2. Now select the version on the "Versions" tab

3. Click the "Open Version" icon
   a) If there is also a PDF next to the original file, ecoDMS also displays the "Open PDF Version" icon

14.5 Export Version

Users can access files and the individual versions if they have the permission to access the file and Version Management. Depending on the file, the versions are available in the original and in PDF/A format.

1. Select a document

2. Now select the version on the "Versions" tab

3. Click the "Export" or the "Export Version" icon
   a) If there is also a PDF next to the original file, ecoDMS displays two different options when you click the export icon:
      i. Export version => Original file
      ii. Export PDF version => PDF

4. Select the destination path in the file system dialog and start exporting

5. If you are using Windows as your operating system, you can now rename the file

6. Confirm the file export with "OK"
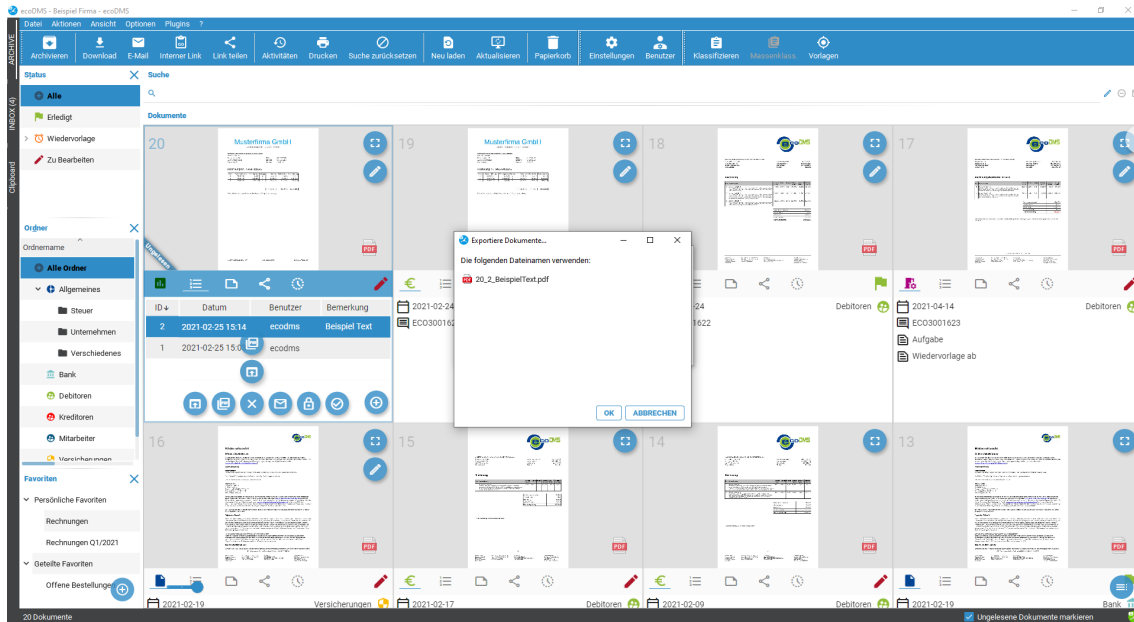
Figure 14.2: Export Version and Rename File (Here: Card View)

14.6 Send Email

You can send the PDF version (or, if not available, the original file) via email. To do so, complete the following steps:

1. Select

– Depending on the application, you cannot send attachments directly from ecoDMS. This is not an error in ecoDMS. For more information on this topic for Ubuntu, please refer to https://bugs.launchpad.net/ubuntu/+source/xdg-utils/+bug/1019259. As a workaround, the administrator can deposit a script for opening the mail client in the settings dialog, where it is available for all users (c.f. "Settings" chapter).

– You can only rename the email attachment before sending if you have a Windows client.

   a document

2. Now select the version on the "Versions" tab

3. Click the "Send Document via Email" icon

4. If you are using Windows as your operating system, you can now rename the file

   a) To rename a file, simply double-click the name, enter the new name and confirm with "Enter"

   b) Confirm your entries with "OK" to continue, or abort the process with "Cancel"

   c) ecoDMS opens the default email programme of your computer and attaches the file in the message window
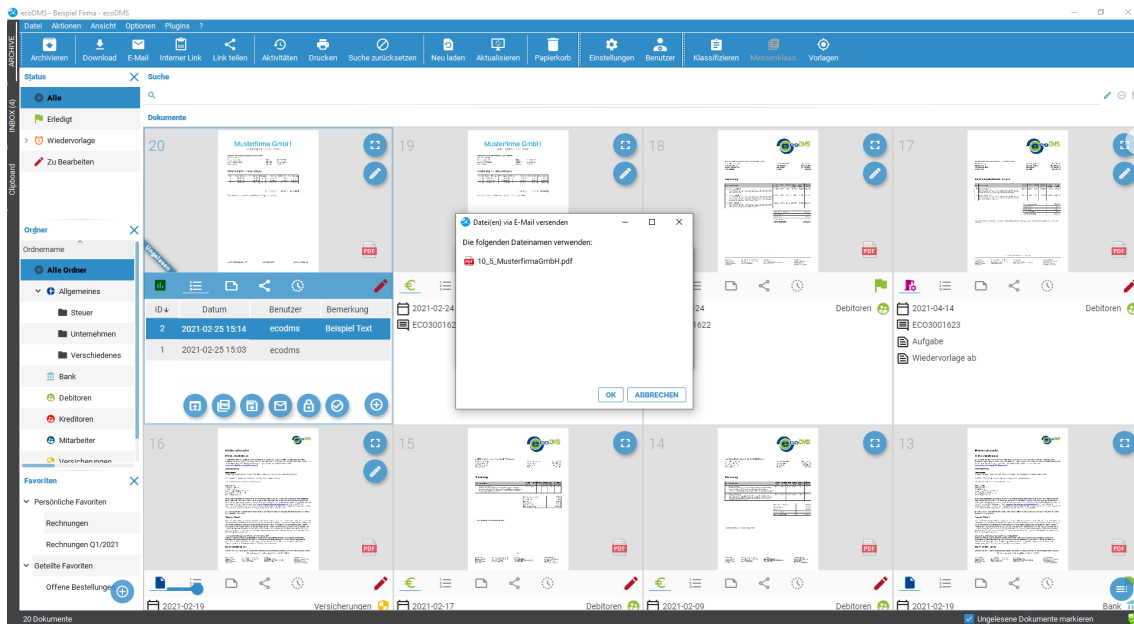
Figure 14.3: Send Version via Email and Rename File (Here: Card View)

14.7 Finalise Document

To finalise work on a document and prevent the addition of further versions, use the "Finalise Document" function. Finalising a document cannot be undone.

1. Select a document

2. Select the final version on the "Versions" tab

3. Click the "Finalise Document" icon

4. The selected version - unless it is the latest version - is stored as the main version of the document. This version also displays in the preview of the document, for example. You cannot add another version.

14.8 Check-Out Document

To prevent several users from working on a document simultaneously and saving different versions, ecoDMS includes a so-called check-in and check-out process. As long as a document is locked, other users can continue to access the versions but cannot save any new versions.

1. Select a document

2. Select a version on the "Versions" tab

3. Click the "Check-Out Document" icon

   a) Other users cannot add new versions to the document until you check-in the document.

14.9 Check-In Document

To prevent several users from working on a document simultaneously and saving different versions, ecoDMS includes a so-called check-in and check-out process. As long as a document is locked, other users can continue to access the versions but cannot save any new versions. You need to check-in the document again to enable editing for other users.

1. Select a document

2. Select a version on the "Versions" tab

3. Click the "Check-In Document" icon

    a) Other users can now file new versions again

15 PDF Editor, Annotations, Highlight Colors, Highlight Report

– This feature requires a license for the full version of ecoDMS, but you can test it in the trial version. This feature is not enabled in the Free4Three version.
– Start the PDF Editor from the document preview:
  – Preview in the Cards view
  – Preview in a separate preview pane
– To edit a file in the PDF Editor,
  – there must be a preview of the document in ecoDMS (PDF)
  – the document must be enabled for classification for the respective user
  – new versions can be added to the document (document is not finalised)
  – the user has the permission to archive, classify, and create and manage versions of documents
– The continuation mode (Scroll pages) is enabled by default in the PDF editor: The most recent setting is saved for each user and client installation.

Use the PDF editor in ecoDMS to edit PDF documents that are archived in ecoDMS. This also includes documents that ecoDMS converted to PDF, for example, image files, Office documents, or documents that were created with a PDF printer. The following features are available:

– Add annotations, for example, time stamps or images

– Highlight text in different colors (text marker)

– Highlight any areas with colors

– Generate highlight reports

All modifications with the PDF editor are saved in a new version of the document. The original document remains unchanged. This ensures you can access earlier document versions at any time.
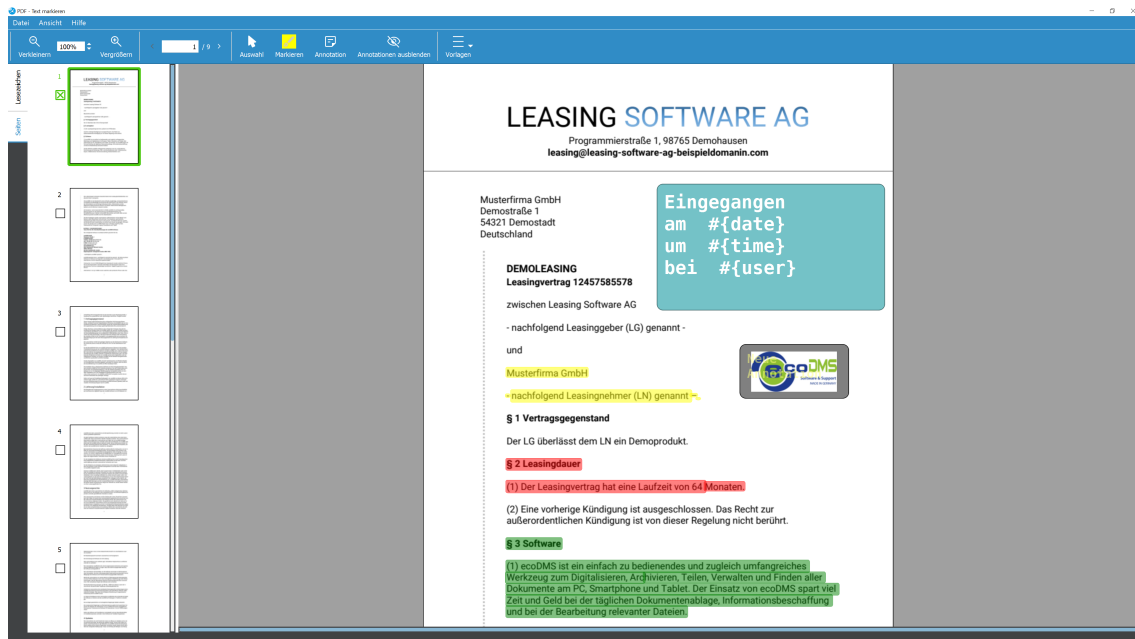
Figure 15.1: PDF Editor with Sample Annotations and Highlight Colors

15.1 Open PDF Editor

To edit a file in the PDF Editor,

- there must be a preview of the document in ecoDMS (PDF)
- the document must be enabled for classification for the respective user
- new versions can be added to the document (document is not finalised)
- the user has the permission to archive, classify, and create and manage versions of documents

If the requirements for using the PDF editor are met, an "Edit PDF" icon displays in the preview (Card View and Preview Pane).

1. To open the PDF Editor, click the "Edit PDF" icon.
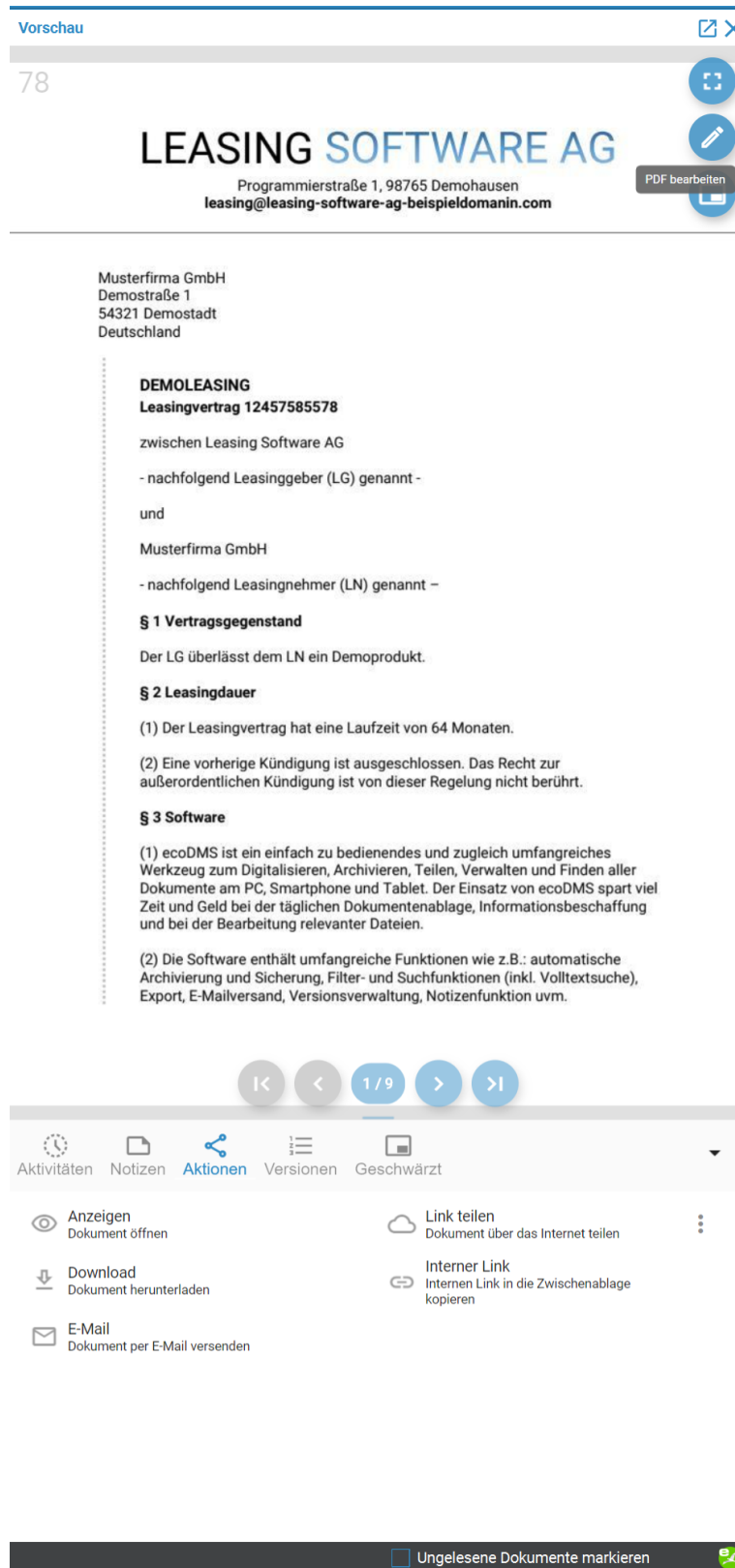
Figure 15.2: Open PDF Editor (here: Preview Pane)

15.2 Save PDF

After editing the PDF, complete the following steps to save it:

1. Click "File - Save and Quit" in the header menu of the PDF Editor.
   a) Alternative keyboard shortcut: CTRL+ Q

2. ecoDMS creates a new version for this document and saves this file as a PDF in the archive.

3. The original file also remains in the version control system.
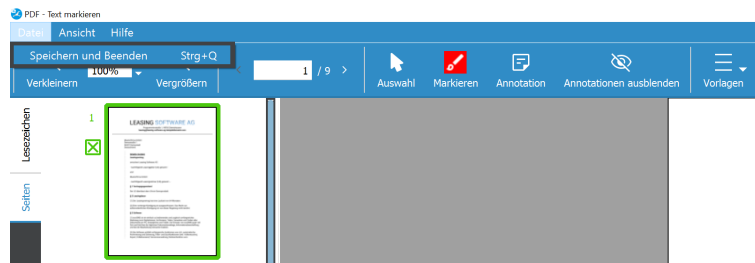
Figure 15.3: PDF Editor: File - Save and Exit

15.3 Continuation Mode (Scroll Pages)

- The continuation mode (Scroll pages) is enabled by default in the PDF editor: The most recent setting is saved for each user and client installation.
- If this feature is NOT enabled, you must click each page of a multi-page document to scroll.

The continuation mode allows you to scroll pages within a document. To enable or disable the feature:

1. Click "View" in the Header Menu of the PDF editor.
   a) Enabled: Check "Continuation mode"
   b) Disabled: Un-check "Continuation mode"

15.4 Annotations

- All users with document and PDF Editor permissions can remove, edit or add to the annotations.
- You cannot edit encrypted documents in the PDF Editor.

Use the PDF editor to apply user-defined annotations. These can include, for example, comments with individual text, images, timestamps or user information.

15.4.1 Create New Annotation

1. In the PDF Editor, click "Annotation" to insert a new field (a new virtual stamp) into the document.
   a) You can add any number of annotations.

2. Enter your content. You can use your own text, placeholders, colors and background images.
   a) The size of the field automatically adjusts to the content.
   b) You can also resize the box manually by moving the edges of the box.

15.4.2 Appearance

You can choose the appearance of an annotation.
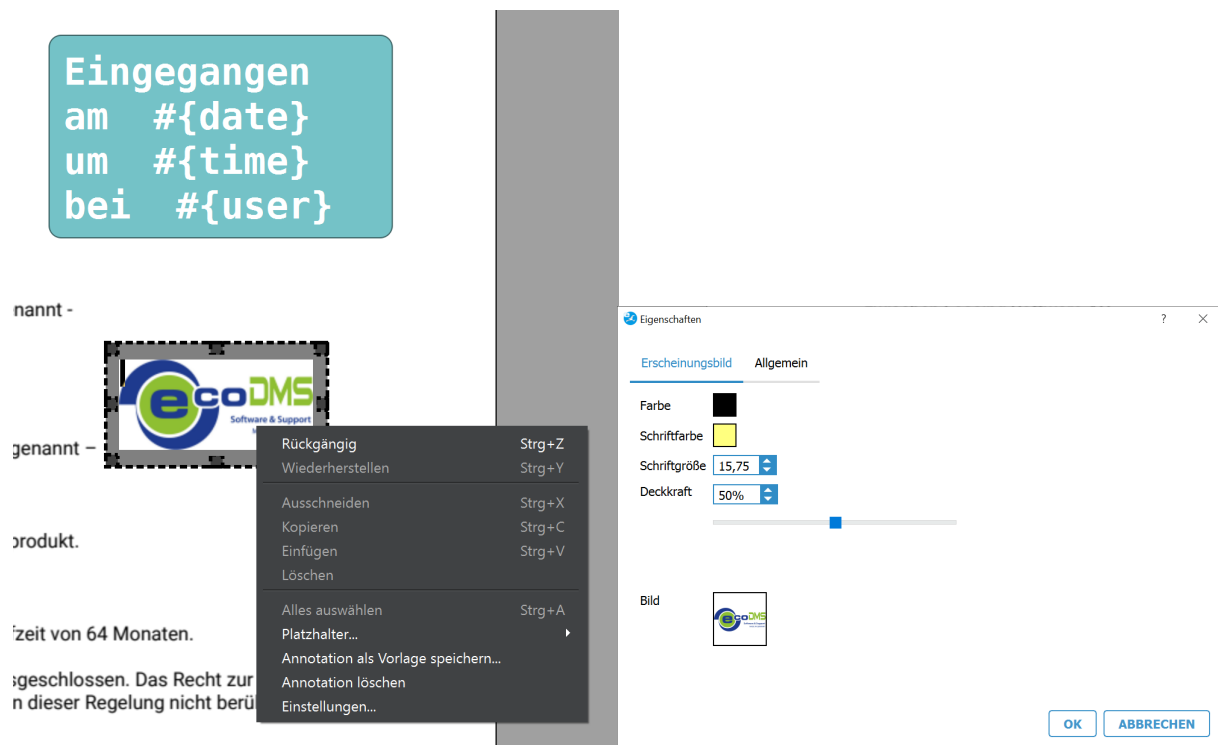
Figure 15.4: PDF Editor: Configure Annotation Appearance (Right-click - Preferences)

15.4.2.1 Font

To configure the font color and the font size, complete the following steps:

1. Right-click the annotation.

2. Select "Preferences".

3. In the "Properties" window, make the settings on the "Appearance" tab.
   a) Font color: Select the font color in the Select Color dialog box.
   b) Font size: Enter the font size or select the font size using the arrow keys in the input box.

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

15.4.2.2 Background Color

To modify the background color of the field, complete the following steps:

1. Right-click the annotation.

2. Select "Preferences".

3. In the "Properties" window, make the settings on the "Appearance" tab.
   a) Color: Select the color in the Color dialogue box.

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

15.4.2.3 Background Image

The following file types are permitted: .jpg, .jpeg, .png and .bmp

You can add a background to an annotation. This way you can create virtual stamps with a custom image.

1. Right-click the annotation.

2. Select "Preferences".

3. In the "Properties" window, make the settings on the "Appearance" tab.
    a) Pixmap: Select an image from your drive.

4. The file is now in the background of the annotation.
    a) You can also resize the field and the background image manually by moving the edges of the box
    b) The background image automatically resizes to fit the size of the field

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

15.4.2.4 Opacity

To modify the opacity of the field (background and font), complete the following steps:

1. Right-click the annotation.

2. Select "Preferences".

3. In the "Properties" window, make the settings on the "Appearance" tab.
    a) Opacity: Enter the opacity as a percentage (%) or select the opacity using the arrow keys in the input box.

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

15.4.3 Placeholder

1. Right-click the annotation.

2. KlickClick "Placeholder"

3. You can add the following placeholders to an annotation:
    a) User
    b) Date
    c) Time

4. Save the edited document in the PDF editor. ecoDMS automatically populates the appropriate values and displays them in the preview of the new version.
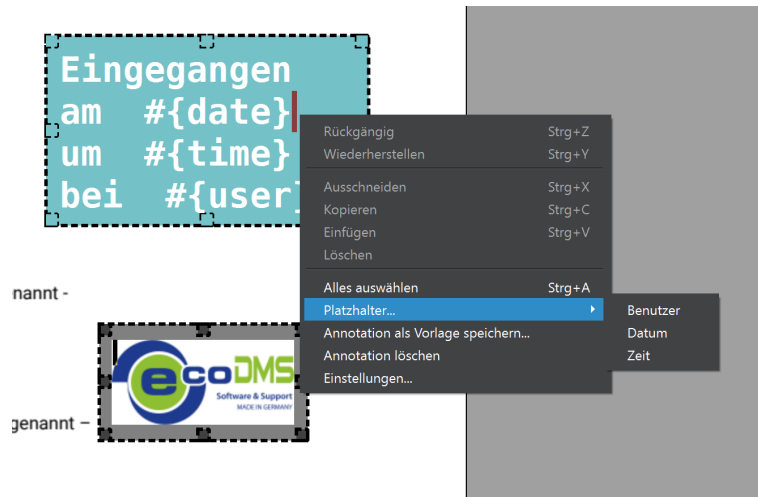
Figure 15.5: PDF Editor: Right-click - Placeholder
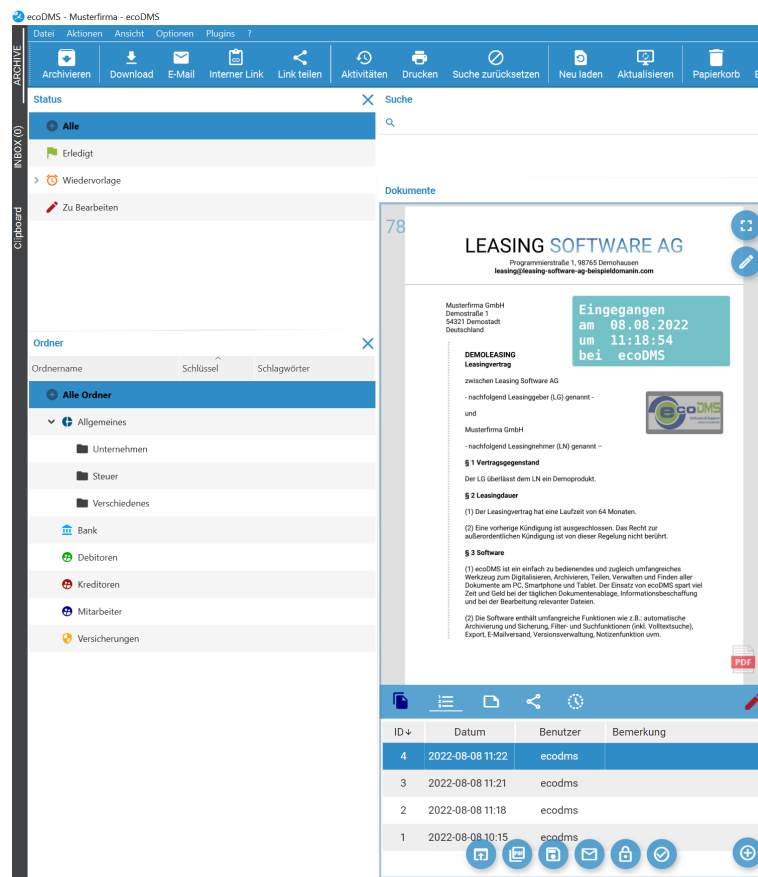
Figure 15.6: PDF Editor: Saved Annotations with Populated Placeholders (here: Preview Pane)

15.4.4 Templates

- All users with access to the PDF Editor can create, view, use and edit templates
- Examples for templates are:
  - Paid on <Date> at <Time> by <User>
  - Reviewed on <Date> at <Time> by <User>
  - Shared on <Date> at <Time> by <User>

You can save recurring annotations as a template for all users with access to the PDF Editor. You can also save virtual stamps, for example.
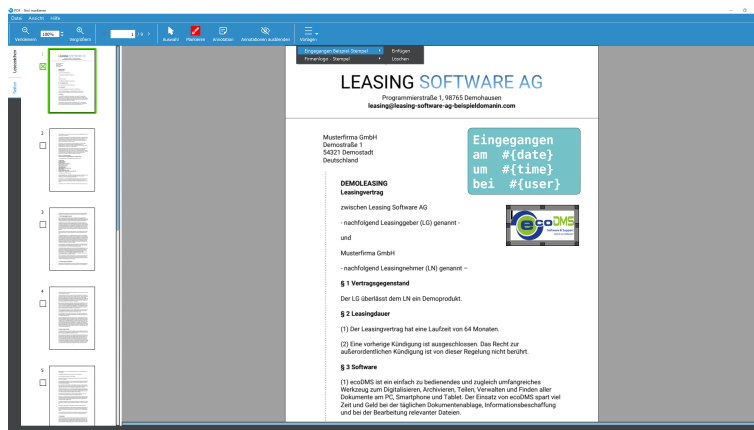
Figure 15.7: PDF Editor: Saved Annotations with Populated Placeholders (here: Preview Pane)

15.4.4.1 Save Annotation As Template

1. Create and fill an annotation with content

2. Right-click the annotation.

3. Click "Save Annotation As Template".

4. Assign a name to the template and confirm the entry with "OK".

5. The annotation is now available in the "Templates" chooser.

Figure 15.8: PDF Editor: Right-click - Save Annotation as Template
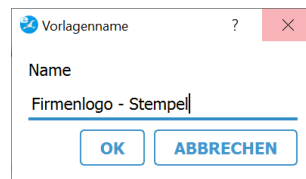
Figure 15.9: PDF Editor: Assign Template Name (Annotation)
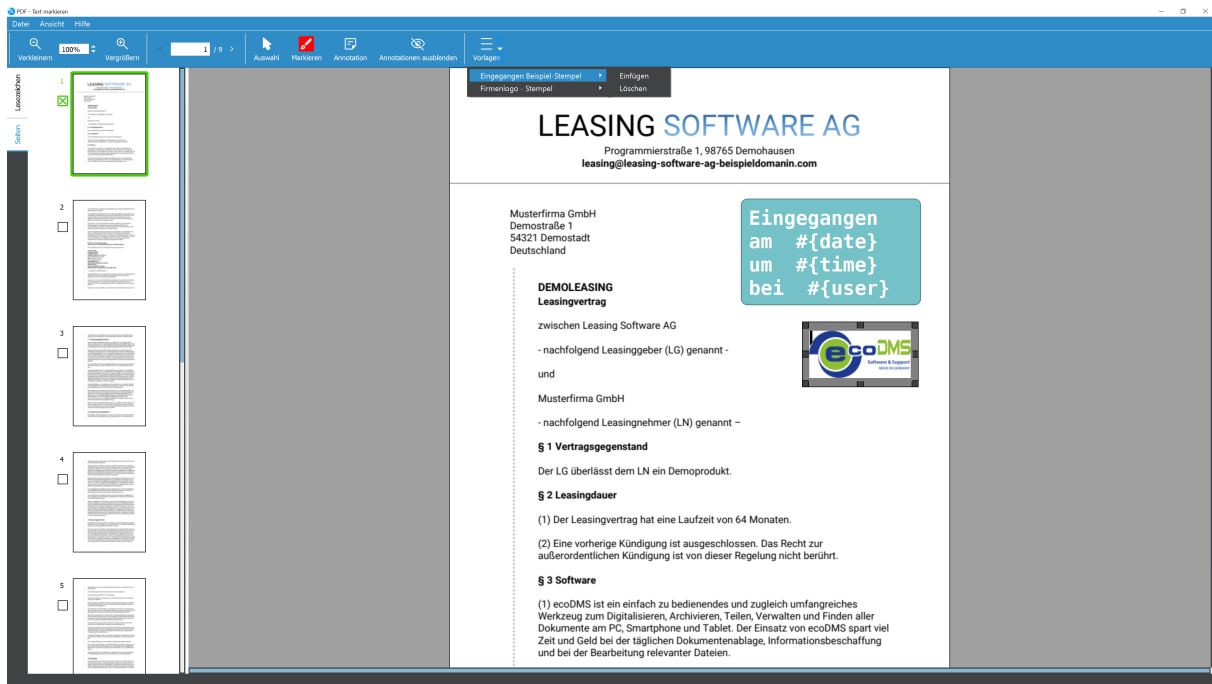
Figure 15.10: PDF Editor: Insert Templates (Annotation)

15.4.4.2 Delete Template

When you execute the delete function, the selected template is immediately deleted for all users. You cannot undo this operation.

To delete an annotation template in the PDF Editor, complete the following steps:

1. Open the PDF Editor for a document.

2. Click the "Templates" button

3. Select a template

4. Click "Delete"

15.4.5 Delete Annotation

To remove an annotation, complete the following steps:

1. Right-click the annotation.

2. Click "Delete Annotation".

3. The field is removed.

Figure 15.11: PDF Editor: Right-click - Delete Annotation

15.4.6 Show/Hide Annotations

The ribbon of the PDF Editor has a "Hide Annotations" or "Show Annotations" button (depending on the current setting).

1. Click "Hide Annotations" to hide all annotations and highlight colors.

   a) If you hide annotations, you cannot create new annotations.

2. Click "Show Annotations" to show all annotations and highlight colors.

15.5 15.5 Highlight Colors + Highlight Report

To highlight important information in a document and leave comments, you can use color highlights to highlight document passages. You can filter and download (export) documents based on these highlight colors. You can also create a highlight report in PDF format. The report contains a summary of all highlight colors and information such as the date of the highlight report generation, the color of the highlight, the DocID, the classification attribute, the highlighted area, the user, and the comment (note).

15.5.1 Highlight Areas

– All users with permission to access the document and the PDF - Editor can also remove and edit highlight colors.

– You cannot edit encrypted documents in the PDF - Editor.

In ecoDMS können Dokumente mit farbigen Markierungen versehen werden, um wichtige Informationen zu kennzeichnen und Kommentare zu hinterlassen.

15.5.1.1 Highlight Text

- You can also view the highlights you save in the PDF in a normal PDF reader.
- You can use them as often as you want with many different colors.

To highlight text passages in a document, complete the following steps:

1. Open the document in the PDF editor.

2. Click the "Highlight Text" button.

3. Choose a color.

4. Press and hold the left mouse button and move the mouse across the text you want to highlight.

5. Once you have made all highlights, you can save the changes. ecoDMS creates a new document version.

    a) To save the file, click "File - Save and Close.
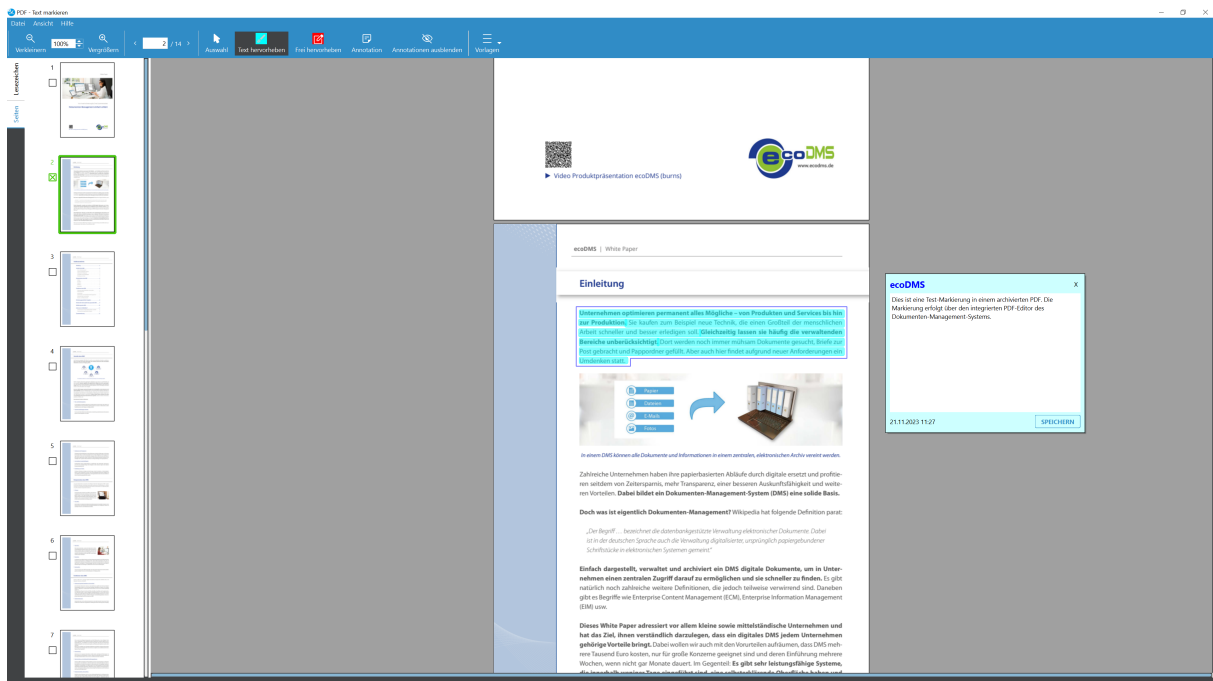
Figure 15.12: Highlight Colors: Highlight Text Passages in a Document (Example)

15.5.1.2 Free Highlight

- You can also view the highlights you save in the PDF in a normal PDF reader.
- You can use them as often as you want with many different colors.

To highlight any areas in a document in color, complete the following steps:

1. Open the document in the PDF editor.

2. Click the "Free Highlight" button.

3. Choose a color.

4. Press and hold the left mouse button and move the mouse across the area in the document you want to highlight.

5. Once you have made all highlights, you can save the changes. ecoDMS creates a new document version.
   a) To save the file, click "File - Save and Close".
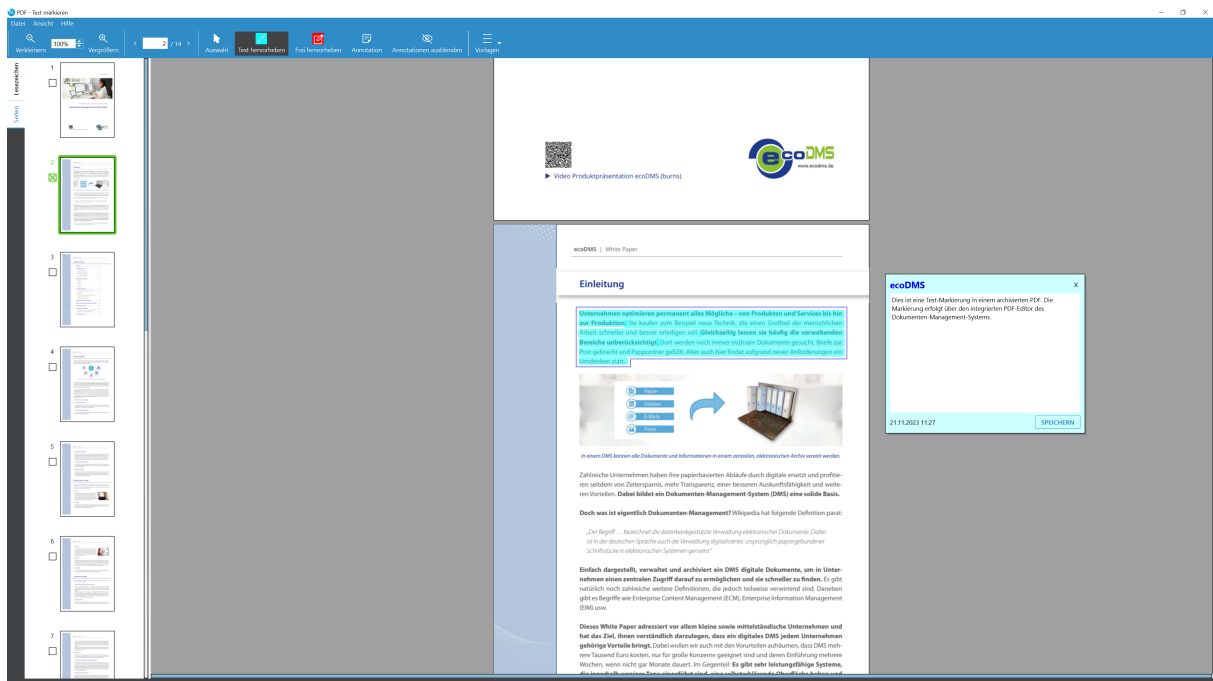
Figure 15.13: Figure 15.13: Highlight Colors: Highlight Any Areas in a Document (Example)

15.5.1.3 Add Notes / Comments

ecoDMS saves the notes you create together with the highlights in the PDF and you can view them in a normal PDF reader.

1. Highlight the text area which you want to comment on.

2. Double-click the Highlight.

3. Enter the note in the Note window.

4. Click Save.

5. Once you have created all highlights and notes, save your edits. ecoDMS creates a new document version.
   a) To save the file, click "File - Save and Close".
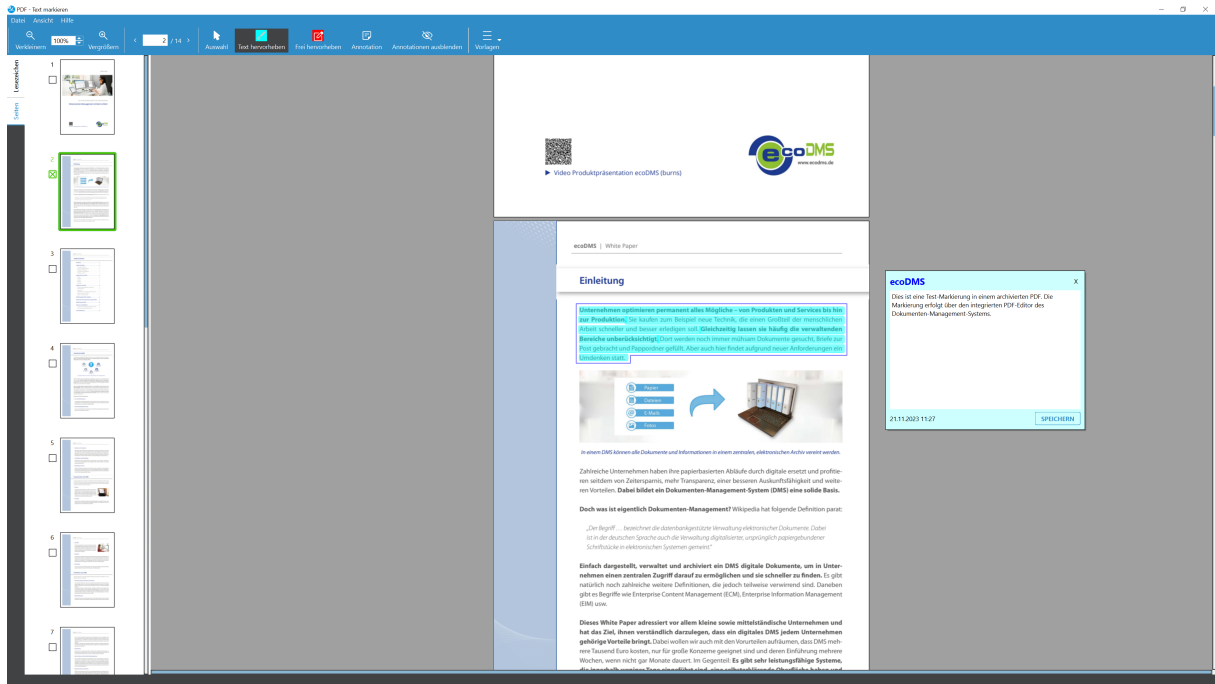
Figure 15.14: Figure 15.14: Highlight Colors: Create Notes / Comments for a Highlight Color

15.5.2 Generate Highlight Report

A highlight report in ecoDMS is a summary of all highlight colors added to a document. The report contains a summary of all information, such as the date of the highlight report generation, the color of the highlight, the DocID, the classification attribute, the highlighted area, the user, and the comment (note).

To

> Pre-requisites:
> – PDF Highlight Tracking must be enabled in the Settings.
> – The user must have the permissions for the documents that are added to the highlight report.

create a highlight report, complete the following steps:

1. Select a folder whose documents you want to include in the highlight report.
   a) You can also select "All Folders" if you want to include all folders for which you have permissions.

2. In the ecoDMS ribbon, click "Generate Report".

3. Choose the highlight colors you want to list in the report.

4. Enable the "Archive report in ecoDMS" feature if you want to archive the highlight report straight to ecoDMS.

5. Click "OK".

Result: The highlight report is created as a PDF file and contains the following information:

1. Name of the selected folder

2. Date of highlight report

3. Highlight color

4. DocID

5. Comment (classification attribute)

6. Highlighted area

7. Author

8. Note

For multiple classifications, the classification attributes are separated with a comma.
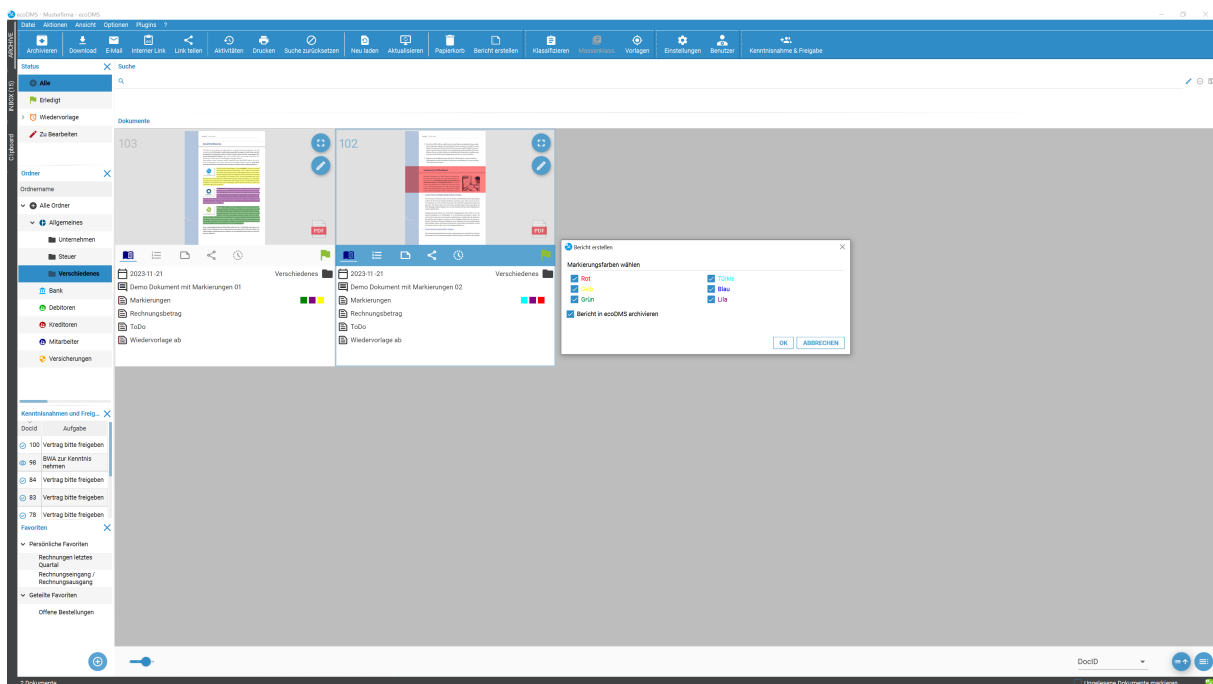
Figure 15.15: Create Highlight Report
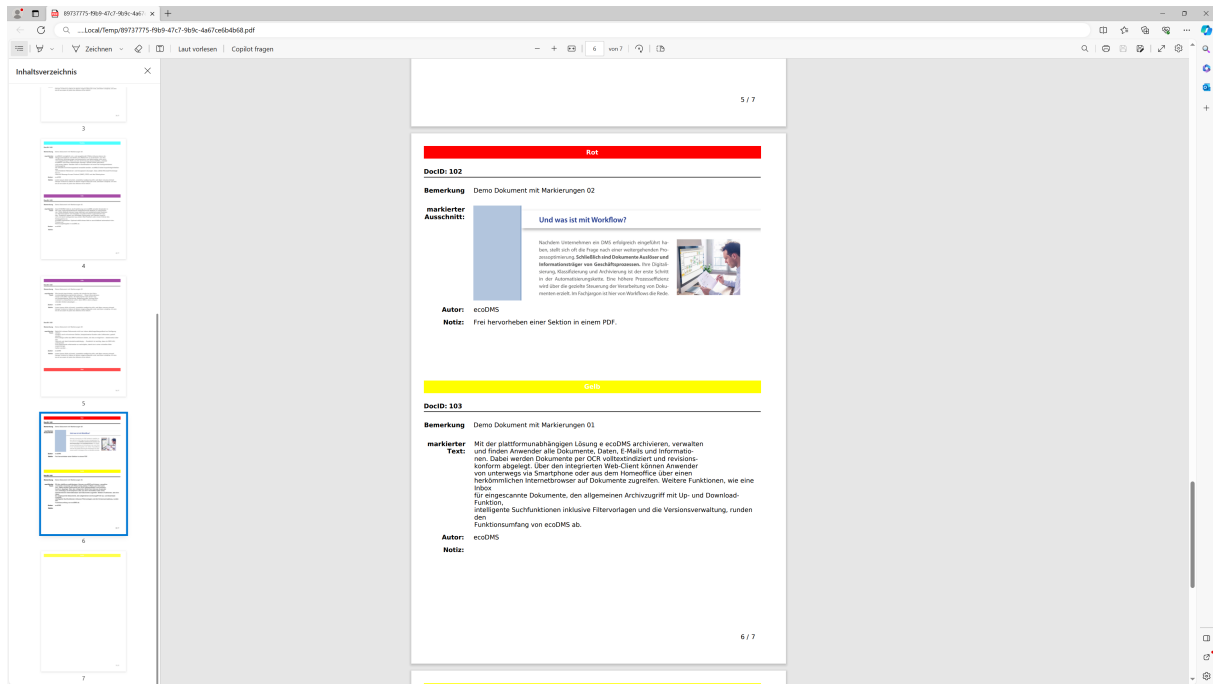
Figure 15.16: Example of a Highlight Report

15.5.3 Include Highlight Colors in Download

You can include highlight colors created in ecoDMS with the PDF editor when downloading documents.

> Pre-requisites:
> PDF Highlight Tracking must be enabled in the Settings.

This is how to do it:

1. Select the documents you want to download.

2. Click "Download".

3. Select the destination folder.

4. Select the highlight colors.

5. Click "OK"..

> Result:
> ecoDMS exports all selected documents. If the documents have highlight colors, only the selected highlight colors will be displayed in the downloaded PDFs.
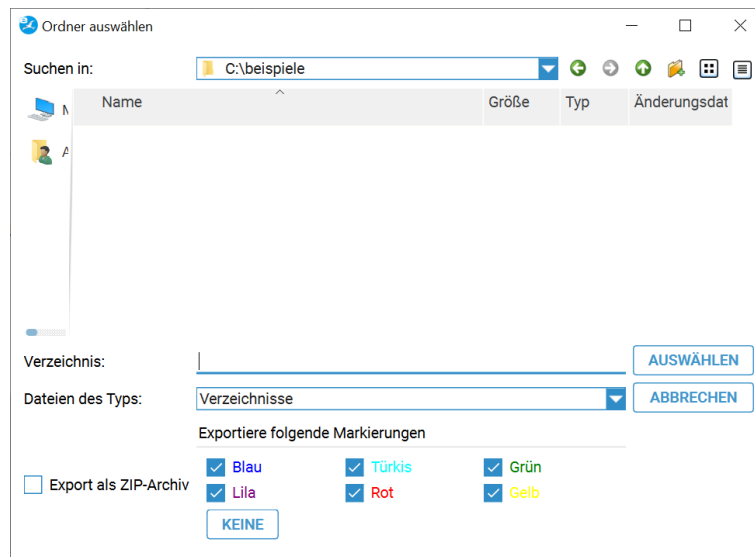
Figure 15.17: Downloading Documents from ecoDMS (here: incl. Highlight Colors)

15.5.4 Include Highlight Colors in Filters

When filtering documents, you can include highlight colors created with the PDF editor. You can find documents that contain specified highlight colors.

> Pre-requisites:
> PDF Highlight Tracking must be enabled in the Settings.

This is how to do it:

1. Click the Edit icon to the right of the search box to open the Advanced Search dialogue.

2. In the "Field" column, select the "Highlight Colors" attribute.

3. Set the matching operator for the search query.

4. Enter the highlight color as a value.

5. Click "OK" to start the search or "Cancel" to abort the process.

> Result:
> ecoDMS only displays documents with the filter criteria. For example, you can find all documents with the highlight color red.
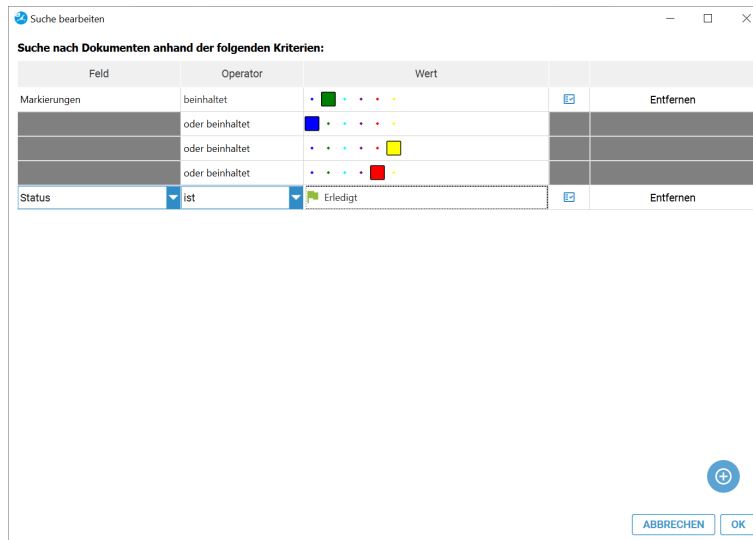
Figure 15.18: Example: This example searches for documents with the "Done" status that contain the colors "green, blue, yellow or red" as highlight colors.
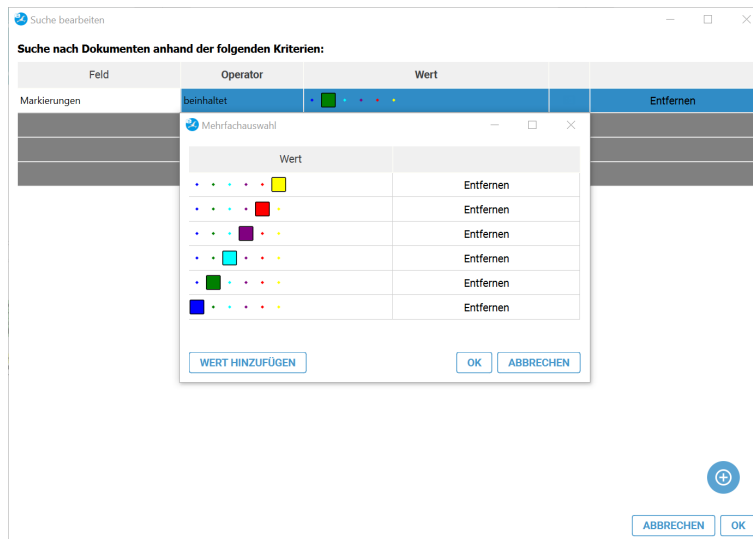
Figure 15.19: Highlight Color Tracking: Advanced Search with OR Operation for All Colors

16 Blackening PDF

- This feature requires a license for the full version of ecoDMS, but you can test it in the trial version. This feature is not enabled in the Free4Three version.
- The "Blackening PDF" feature is only available in the preview pane (not in the Card preview) for the visible documents (PDFs).
- The blackened information is saved in the "Blackened Versions" tab, which you can only see in the preview pane.
- Every time you save a document with the "Blackening PDF" feature, ecoDMS creates a new entry on the "Blackened Versions" tab.
- You cannot edit encrypted documents in the PDF Editor.

Occasionally, parts of documents need to be blackened for special purposes. Blackening passages is important if, for example, you pass on documents to third parties. For internal use of the documents, the blackened passages are removed. In the internal view the document is fully visible. In such cases you can use the "Blackening PDF" feature of ecoDMS.

Figure 16.1: Preview Pane: Blackening PDF (Icon) + "Blackened Versions" Tab
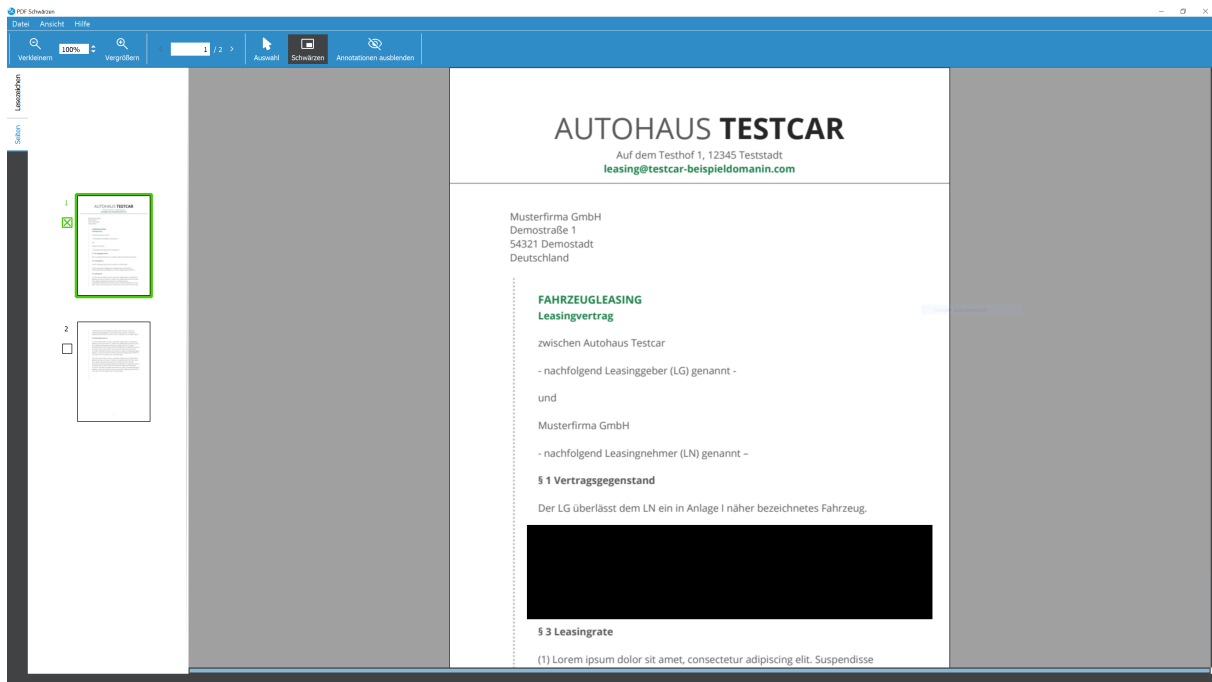
Figure 16.2: PDF Editor "Blackening PDF"

16.1 Blacken

- For each redacted version you can enter a note on the "Blackened Versions" tab.
- A badge displays the number of blackened versions.
- You cannot edit a blackened version and a blackened version does not display in the preview.

To blacken a PDF, complete the following steps:

1. In the preview pane, click "PDF Blackening".

2. In this PDF Editor, click "Blacken".

3. Select the area in the document which you want to blacken.

4. You can blacken any number of passages in a document.

5. Click "File - Save and Close" to save the document.

6. The redacted version of this document displays on the "Blackened Versions" tab below the document preview in the preview pane.

16.2 Unblacken

You can only undo a redaction as long as the current version is open. To do so, complete the following steps:

1. Right-click the blacked out area in the PDF Editor and select "Unredact"

16.3 Open Blackened Version

You can save different versions of a redacted document. They display on the "Blackened Versions" tab below the document preview in the preview pane. To open a version, complete the following steps:

1. Go to the "Blackened Versions" tab below the document preview in the preview pane.

2. Select a version by
   a) double-clicking the entry
   b) or opening the entry by clicking "Open Version"

16.4 Export Blackened Version

You can save different versions of a redacted document. They display on the "Blackened Versions" tab below the document preview in the preview pane. To export a version, complete the following steps:

1. Go to the "Blackened Versions" tab below the document preview in the preview pane.

2. Select a version by

3. Click "Export Version"

17 Clipboard: Collect Documents

- This function requires a license for the full version of ecoDMS but can also be tested in the trial version. This function is not enabled in the Free4Three version.

- Storing files in the clipboard has no effect on existing access permissions or classifications of individual documents.

- You can add up to 200 documents to each clipboard.

- When you open the clipboard, the documents load one after the other. This process may take a while depending on the number and size of the file(s).

Use the Clipboard tab in ecoDMS to collect archived documents in a kind of virtual folder. Each user can create several clipboards and fill them with documents. You can also share a clipboard with other users / groups. Moreover, you can export the collected documents and send them by email.
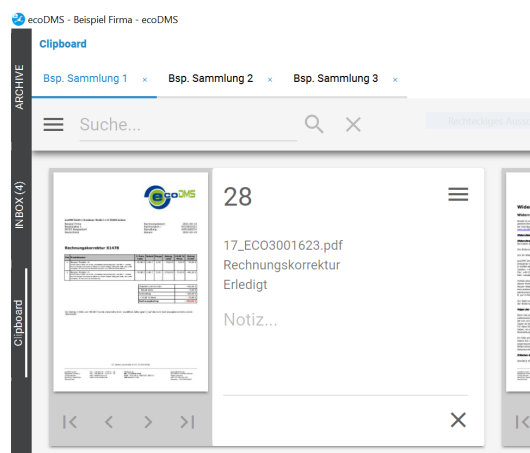
Figure 17.1: Tabs in ecoDMS Client - Clipboard
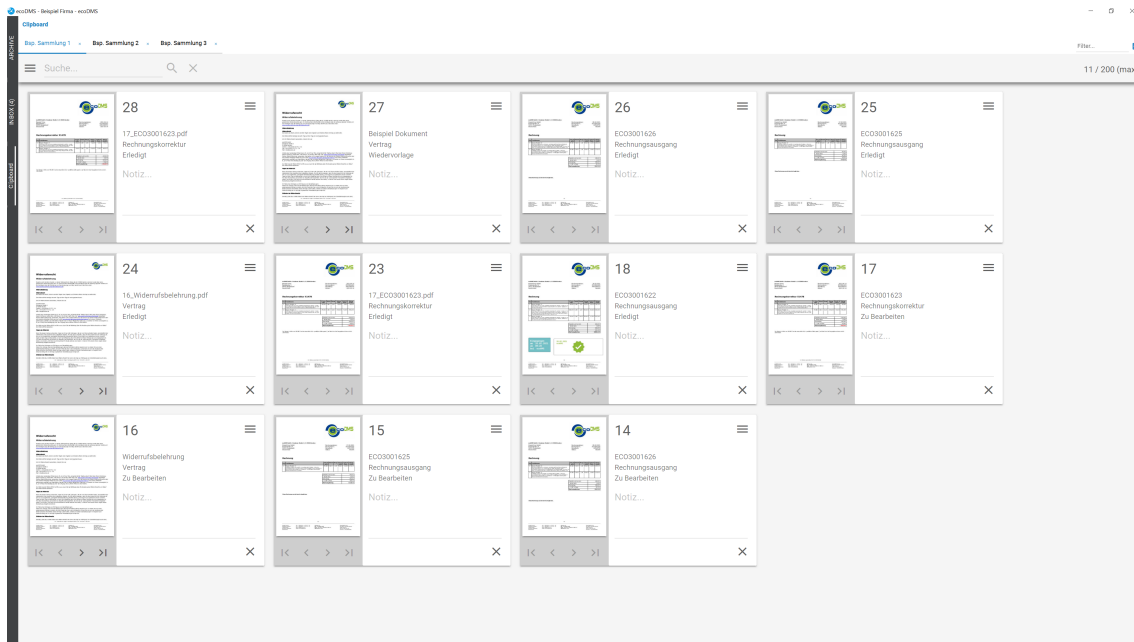
Figure 17.2: Clipboard - Example Document Collection

17.1 Add Documents

You can add up to 200 documents to each clipboard. To drag one or more documents to a clipboard, complete the following steps:

1. Select the documents
   a) Press and hold the CTRL key to select several documents at once

2. Drag&drop the documents onto the Clipboard tab
   a) If there are several clipboards, they display when you move the documents onto the Clipboard tab. Simply drag the documents straight onto the desired clipboard
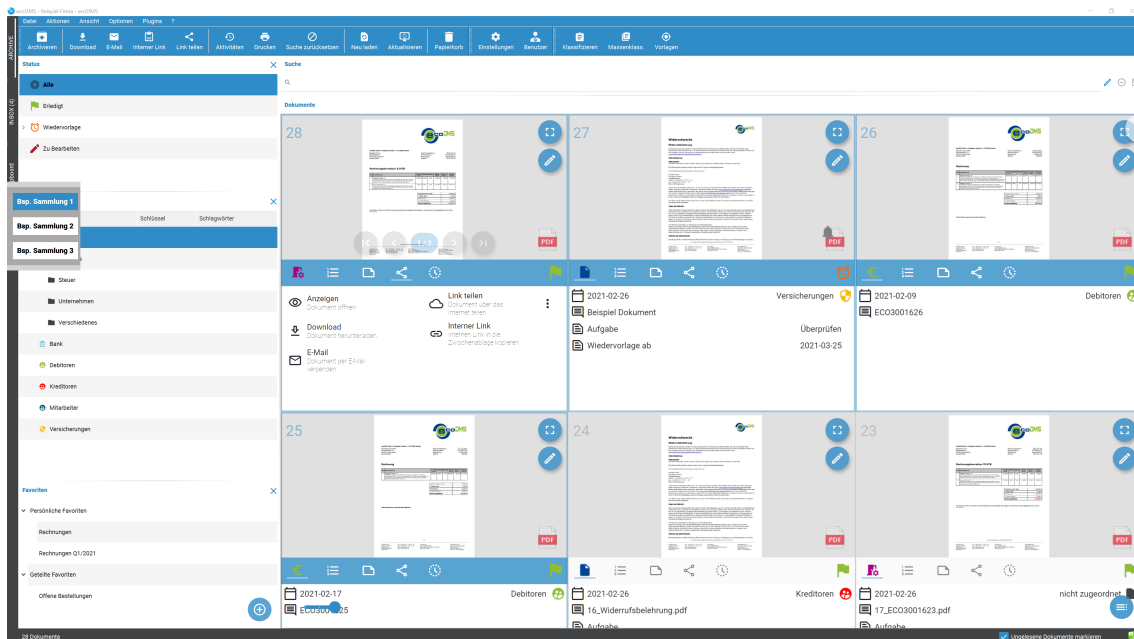
Figure 17.3: Clipboard - Drag and Drop Documents onto a Clipboard

17.2 Create Clipboard

ecoDMS has a default clipboard. You can add more clipboards.

1. Click the Menu icon on the Clipboard tab -> New Clipboard

    a) Alternatively, you can create a new clipboard by using the "Plus" icon at the top right of the Clipboard window

2. ecoDMS creates another tab with the name "New Clipboard"

3. Double-click the name of the clipboard to rename it

17.3 Empty Clipboard

To remove all documents from a clipboard, complete the following steps

1. Open the clipboard

2. Click the Menu icon on the Clipboard tab -> Empty Clipboard

3. All documents are immediately removed from the selected clipboard

    a) You cannot undo this operation

    b) The files are only removed from the clipboard, not from the archive.

17.4 Remove Clipboard

To delete a clipboard, complete the following steps:

1. Open the clipboard

2. Click the Menu icon on the Clipboard tab -> Remove Clipboard

    a) Alternatively, you can click the X icon next to the clipboard name

3. Confirm the confirmation prompt "Delete Clipboard - Delete Clipboard XXX" with "Yes", or abort the process with "No"

4. The clipboard is irrevocably deleted

    a) You cannot undo this operation

17.5 Export Documents

To export the documents on a Clipboard, complete the following steps:

1. Open the clipboard

2. Click the Menu icon on the Clipboard tab -> Export Clipboard

3. In the dialog of your file system, select the destination folder for the export

    a) If you want to export all documents as a ZIP file, enable the "Export as ZIP Archive" function

17.6 Send Documents

To send the documents on a Clipboard via email, complete the following steps:

1. Open

> – Depending on the application, you cannot send attachments directly from ecoDMS. This is not an error in ecoDMS. For more information on this topic for Ubuntu, please refer to https://bugs.launchpad.net/ubuntu/+source/xdg-utils/+bug/1019259. As a workaround, the administrator can deposit a script for opening the mail client in the settings dialog, where it is available for all users (c.f. "Settings" chapter).
>
> – You can only rename the email attachment before sending if you have a Windows client.

the clipboard

2. Click the Menu icon on the Clipboard tab -> Send Clipboard

3. If you are using Windows as your operating system, you can now rename the file

   a) To rename a file, simply double-click the name, enter the new name and confirm with "Enter"

   b) Confirm your entries with "OK" to continue, or abort the process with "Cancel"

4. ecoDMS opens the default email programme of your computer and attaches the file in the message window
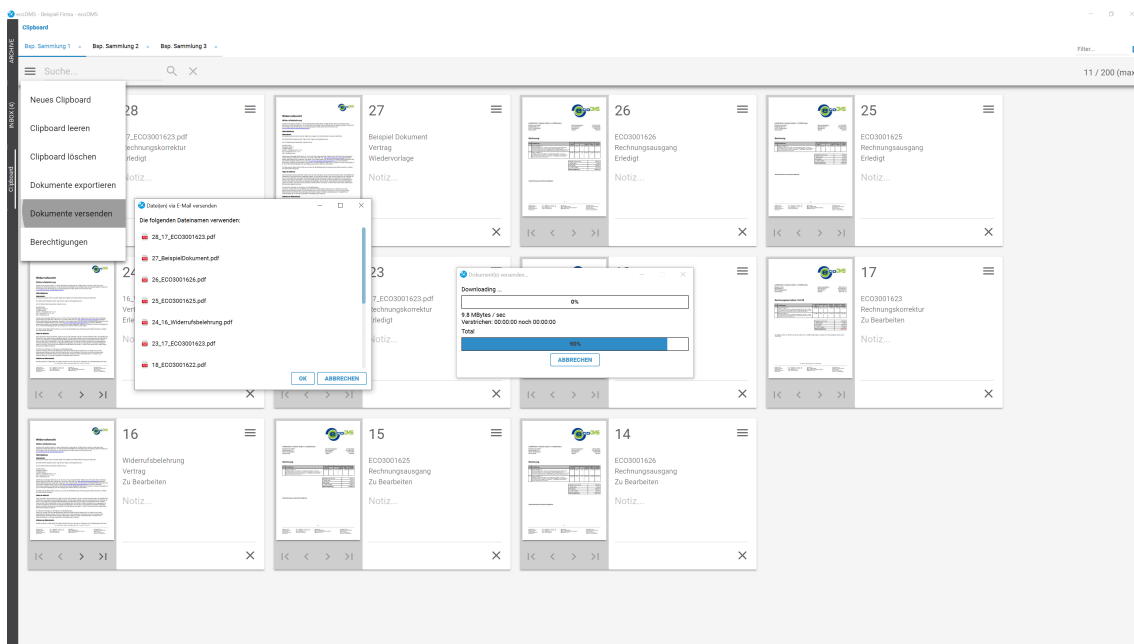
Figure 17.4: Clipboard - Send Documents by Email and Rename Files Beforehand

17.7 Clipboard Permissions

> – Existing document and folder permissions are independent of clipboard permissions.
>
> – Users can only see the documents for which they have permissions (classification, folder permission).

A clipboard, on the other hand, can be shared with other users. The user who creates a clipboard can assign read and write permissions.

1. Open the clipboard

2. Click the Menu icon on the Clipboard tab -> Permissions

3. In the Permissions dialog, assign the respective read and write permissions for the clipboard
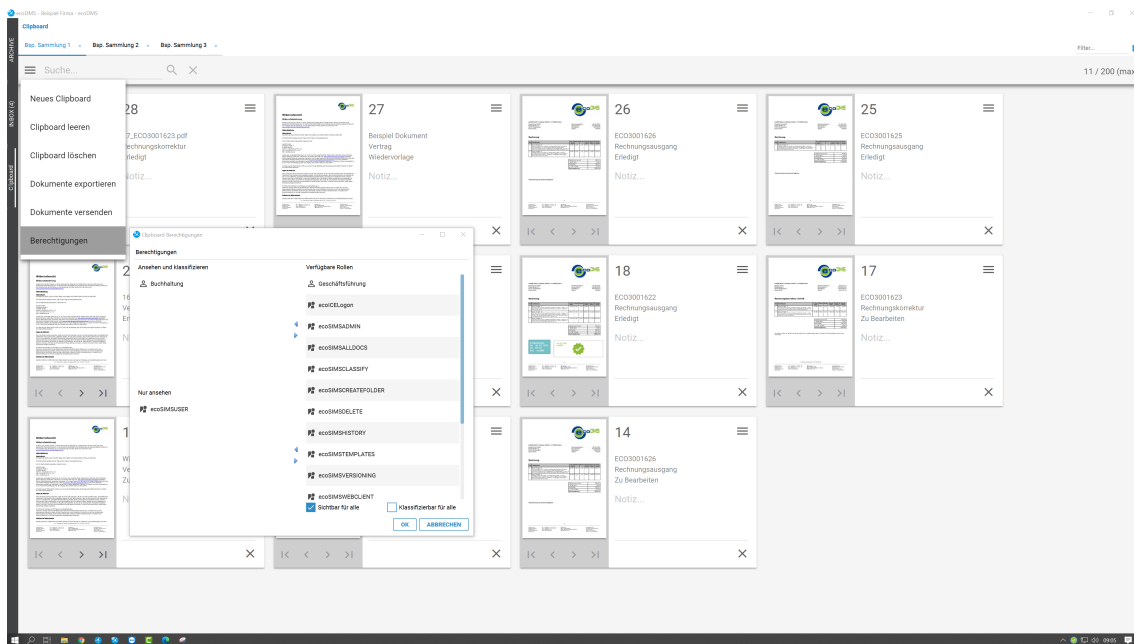
Figure 17.5: Clipboard - Share Clipboard with Other Users (Permissions)

17.8 Open Document

- To enlarge the preview of a document in the clipboard, simply click the preview image.
- To open the file, ecoDMS uses the default application on your computer for the specified file type.

The clipboard displays a separate card view for each document. Each entry contains the DocID, the comment, the document type, the status and an optional note. PDFs also have a preview in which you can scroll through the individual pages. Whether or not a preview is available, you can always open the file from the clipboard. To do so, complete the following steps:

1. Open the menu in the upper right corner of the document on the clipboard -> Open Document

2. ecoDMS opens the document

17.9 Delete Document

To remove a document from the clipboard, complete the following steps:

1. Open the menu in the upper right corner of the document on the clipboard -> Delete Card
   a) Alternatively, you can click the X icon in the lower right corner of the document card

2. The document is immediately removed from the selected clipboard
   a) You cannot undo this operation
   b) The file, in this case, is only removed from the clipboard, not from the archive

17.10 Show Classification

1. If you have the permission, you can use the classification dialog as usual.

2. Please note that changes to the classification will also have an effect outside the clipboard.

3. This dialog is where you specify the classifications for all DocIDs in ecoDMS.

To open the classification dialog for a document from the clipboard, complete the following steps:

1. Open the menu in the upper right corner of the document on the clipboard -> Show Classification

2. ecoDMS opens the classification dialog for the document

17.11 Search for Clipboard

If there are several clipboards, you can filter them by name.

1. Enter the name of the tab you want to search for in the "Filter" search box
   a) The search box is in the top right corner of the clipboard window

2. Confirm your entry with "Enter"

3. ecoDMS displays the retrieved clipboard tabs
   a) To stop filtering, simply delete the entry

17.12 Search Documents in Clipboard

Use a full-text search to search for documents within a clipboard.

1. Enter the search term in the search box of the clipboard

2. Confirm your entry with "Enter"

3. The matching results are displayed in the clipboard

4. The "X icon" ends the search process in the clipboard

18 Notes

- All users with access to the document in ecoDMS can edit, add to and delete notes at any time.
- ecoDMS automatically creates a full-text index of the note texts. This ensures that notes are included when executing a full-text search.

You can also add notes to archived documents. The function is similar to the well-known yellow sticky notes.
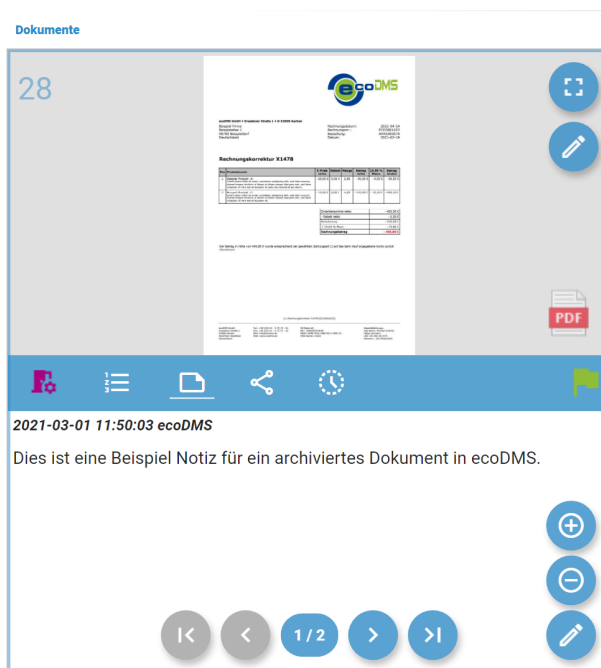
Figure 18.1: Notes - Card View (Example)

18.1 Write New Note

To write a note, complete the following steps:

1. Select a document

2. Open the "Notes" tab of the document

3. Click the "New Note" icon

4. Enter a text

5. Click "Save" to save your entry
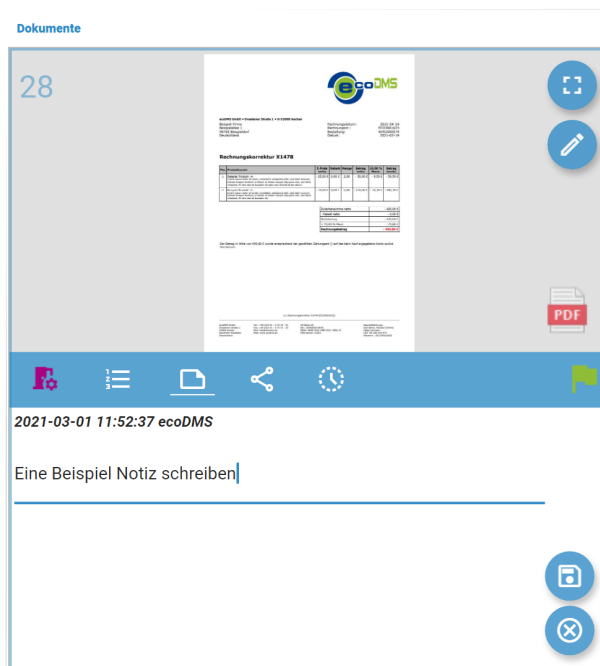
Figure 18.2: Notes - Enter Text (Card View)

18.2 Edit Note

To edit a note, complete the following steps:

1. Select a document

2. Open the "Notes" tab of the document

3. If there are several notes, select a note using the arrow keys

4. Click the "Edit Note" icon

5. Make your changes

6. Click "Save" to save your entry

18.3 Delete Note

To delete a note, complete the following steps:

1. Select a document

2. Open the "Notes" tab of the document

3. If there are several notes, select a note using the arrow keys

4. Click the "Delete Note" icon

5. The note is immediately and irrevocably deleted
   a) You cannot undo this operation

19 Link Documents

– This function requires a license for the full version of ecoDMS but can also be tested in the trial version. This function is not enabled in the Free4Three version.

– This function is only available in the table view.

You can link various documents with each other in ecoDMS and hold them together in form of a virtual document clip. Basically, you have one main document. You can add further documents to the main document in form of links. ecoDMS then displays the linked documents as fold-out sub-entries in the table view.
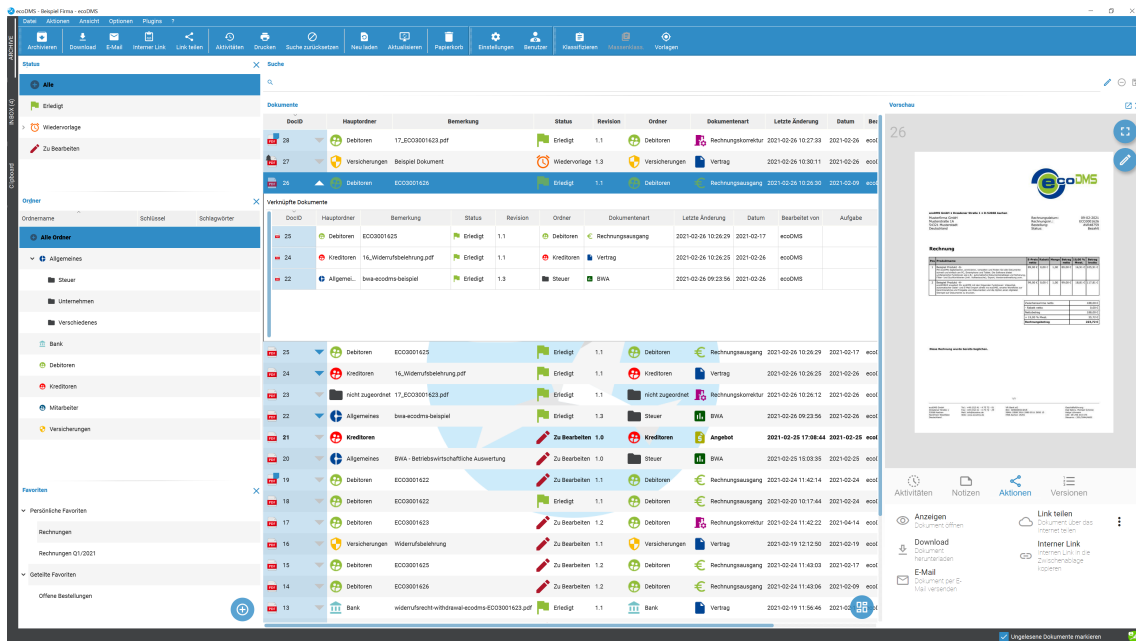
Figure 19.1: Linked Documents - Example in the Table View
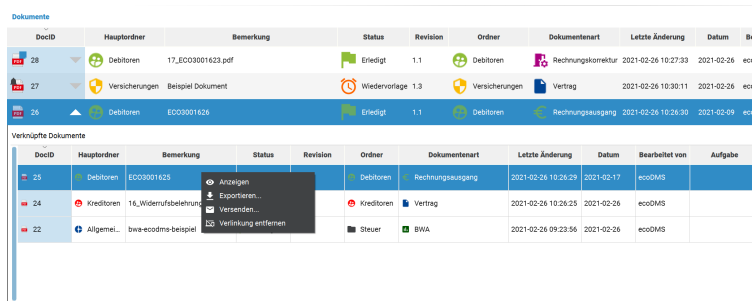
Figure 19.2: Linked Documents - Functions

19.1 Create Link

To link documents, complete the following steps:

1. Select the "main document"

2. Click the arrow next to the DocID

3. Select the documents you want to link to the main document
    a) Press and hold the CTRL key to select several documents

4. Drag and drop the selected documents into the extended "Linked Documents" area of the main document

19.2 Remove Link

To undo the link of a document, complete the following steps:

1. Select the "main document"

2. Expand the linked documents by clicking the arrow next to the DocID

3. Right-click the link you want to delete -> Remove Link

19.3 Open Link

> – To open the file, ecoDMS uses the default application on your computer for the specified file type.

To open the file of a linked document, complete the following steps:

1. Select the "main document"

2. Expand the linked documents by clicking the arrow next to the DocID

3. Select the links
    a) Press and hold the CTRL key to select several documents at once

4. Right-click -> Display
    a) Alternatively, you can open a document by double-clicking the DocID

19.4 Export Link

To export linked documents, complete the following steps:

1. Select the "main document"

2. Expand the linked documents by clicking the arrow next to the DocID

3. Select the links
    a) Press and hold the CTRL key to select several documents at once

4. Right-click -> Export

5. In the dialog of your file system, select the destination folder for the export
    a) If you want to export all documents as a ZIP file, enable the "Export as ZIP Archive" function

19.5 Send Link

To send linked documents as email attachments, complete the following steps:

1. Select

- Depending on the application, you cannot send attachments directly from ecoDMS. This is not an error in ecoDMS. For more information on this topic for Ubuntu, please refer to https://bugs.launchpad.net/ubuntu/+source/xdg-utils/+bug/1019259. As a workaround, the administrator can deposit a script for opening the mail client in the settings dialog, where it is available for all users (c.f. "Settings" chapter).

- You can only rename the email attachment before sending if you have a Windows client.

the "main document"

2. Expand the linked documents by clicking the arrow next to the DocID

3. Select the links

   a) Press and hold the CTRL key to select several documents at once

4. Right-click -> Send

5. In the dialog of your file system, select the destination folder for the export

   a) If you want to export all documents as a ZIP file, enable the "Export as ZIP Archive" function

6. If you are using Windows as your operating system, you can now rename the file

   a) To rename a file, simply double-click the name, enter the new name and confirm with "Enter"

   b) Confirm your entries with "OK" to continue, or abort the process with "Cancel"

7. ecoDMS opens the default email programme of your computer and attaches the file in the message window

20 Sharing Documents over the Internet

- To use this function, you first need to enable remote access in the ecoDMS settings dialog.
- In addition, you require the system permissions for sharing documents via the internet.
- This function requires a license for the full version of ecoDMS but can also be tested in the trial version. This function is not enabled in the Free4Three version.
- ecoDMS recommends you assign secure access settings (password, etc.) because you are providing archived data to externals.

Users with the relevant permissions can share documents with third parties via the internet and make them available for external download. To download these documents, the recipient requires a unique download link and the matching password. All necessary sharing settings are made in advance by the responsible user in the ecoDMS. The sharing period can also be configured by setting a date.

20.1 Enable Remote Access

To share documents from ecoDMS via the internet, you must enable remote access in the Settings.

To learn more about the web settings and the associated remote access of the ecoDMS web client, refer to the chapter "Web Access > Remote Access" in the Web Client manual.
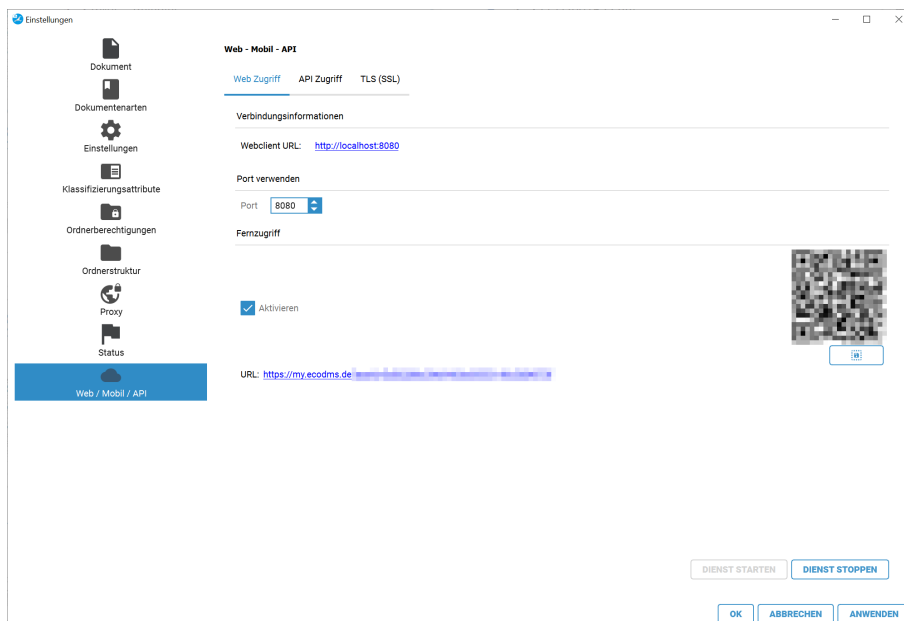
Figure 20.1: Enable Remote Access in ecoDMS Settings

20.2 Share Documents

To provide selected documents for download, complete the following steps:

1. Select the documents
    a) Press and hold the CTRL key to select several documents at once

2. Start the "Share Documents" dialog using one of the following options:
    a) Toolbar -> "Share Link" icon
    b) Menu -> Actions -> Share Document via Internet
    c) Table view: Right-click -> Actions -> Share Document via Internet
    d) Keyboard shortcut: CTRL + T

3. **Password:** Assign a secure password.

> – The password is required to start the download.
> – ecoDMS recommends you assign a password.
> – The password must have at least 8 characters.
> – This is an optional field, not a mandatory field.

4. **Maximum Download Count:** Enter how often the documents you provide may be downloaded.

> You can restrict the number of possible downloads here. For example, you can specify that the provided documents may be downloaded a maximum of two times. In this case, enter "2" as the value. When the maximum number of downloads has been reached, the files cannot be downloaded again.

5. **Share until:** Here you can enter a relevant description.

> a) ecoDMS recommends you define an end date for sharing the selected files.
> b) Once this date has expired, the documents can no longer be downloaded.

6. **Comment:** Here you can enter a relevant description.

> a) Entering a comment is optional.
> b) A comment may be a note about the purpose of the download (e.g. Quarterly figures for the accountant).

7. **OK**: Save and copy the download link to the clipboard

> a) As soon as you click the OK button, ecoDMS creates the associated download link and copies the link to the clipboard.
> b) You can no longer make changes after you click OK. If you want to make changes, you must delete the download (see "Delete External Downloads") and create a new download.
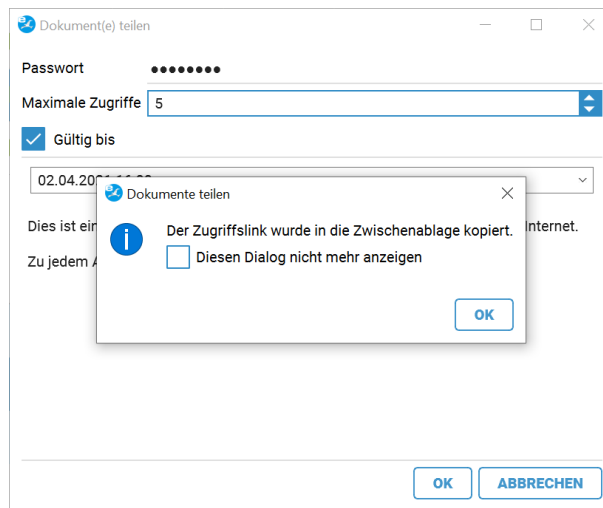
Figure 20.2: Share Document(s) - Settings with Clipboard Information

20.3 Start Download

To start downloading the shared documents, recipients need the generated download link. Moreover, the ecoDMS server must be accessible and remote access must be enabled.

1. Copy the download link to the web browser.

2. If a password was assigned, ecoDMS requests the recipient to enter this password.

   a) Enter the password in the input box.

3. The download starts automatically.

---

   a) Click the "Download Cloud" to start downloading manually.
   b) If there are several files for download, these are zipped to a ZIP file while retaining their original format.
   c) A single file is not zipped for download.
   d) The file formats in the ecoDMS table are used for download.
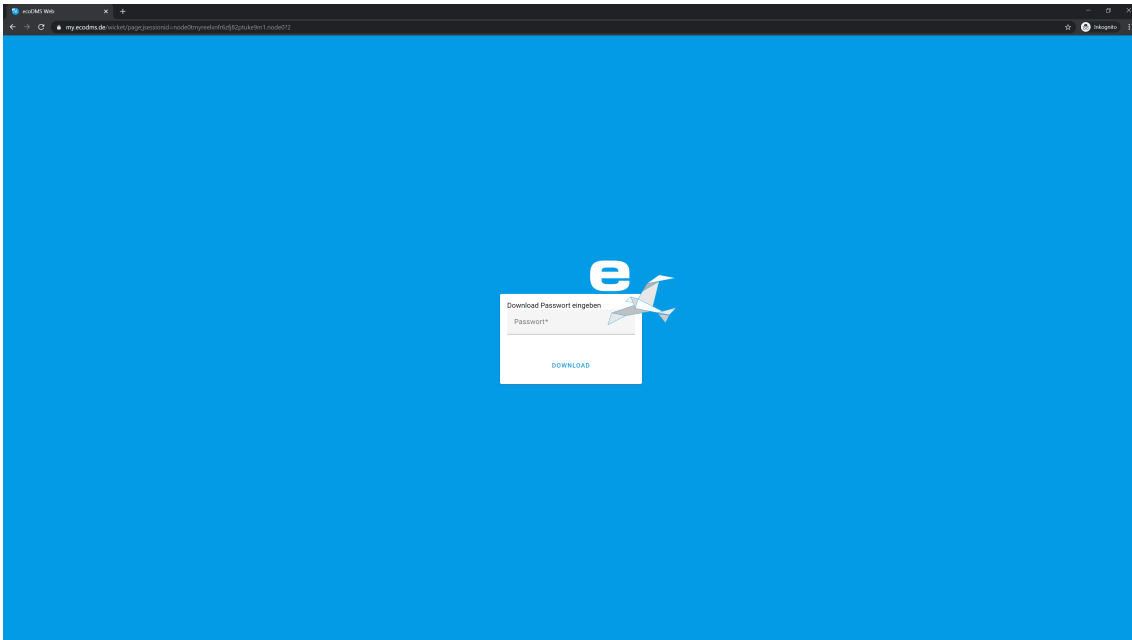
Figure 20.3: Share Document(s) - Download - Login
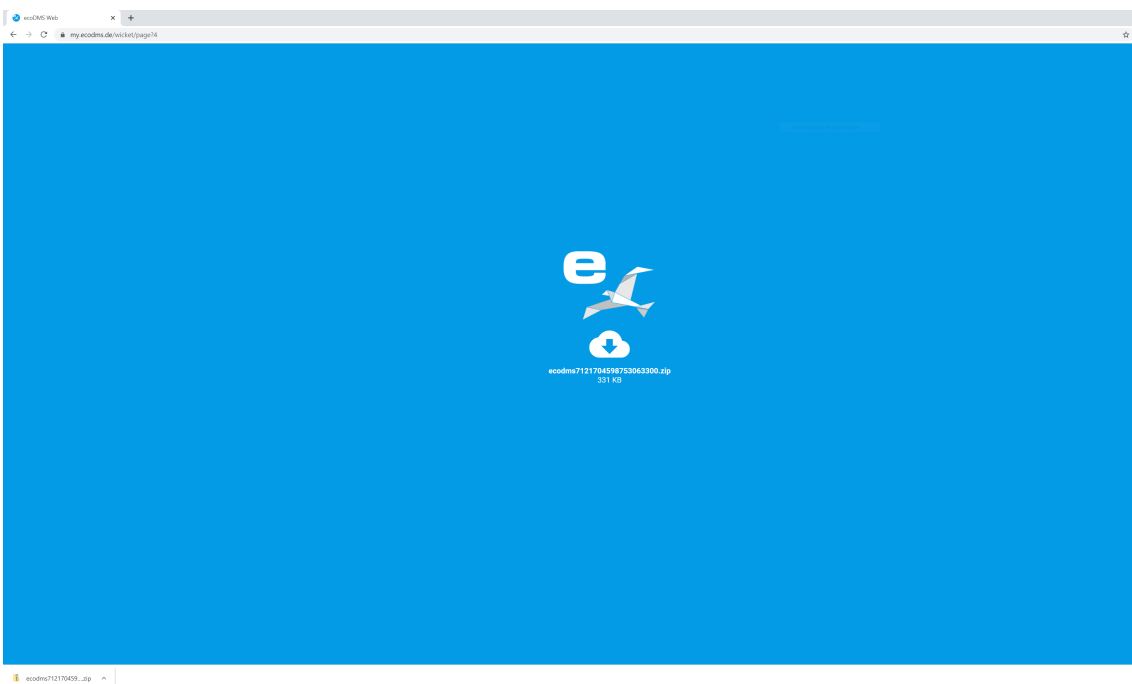
Figure 20.4: Share Document(s) - Download - ZIP File

20.4 Shared Documents Overview

ecoDMS has an overview of shared documents and their respective settings and downloads in form of a list. The list shows all information in a table. You cannot modify the list entries. If you need to modify any settings, you must delete the entry from the list (Actions column) and re-create the entry with the "Share Document(s)" function.

1. Open the list by clicking "Menu > Actions > Shared Documents..."

Figure 20.5: Share Document(s) - Overview of Shared Documents

20.5 Delete Downloads

You can stop external sharing of documents. To do so, you must delete the respective download job from the "Overview of Shared Documents". To do so, complete the following steps:

1. 1. Open the "Overview of Shared Documents" by selecting "Menu > Share > Shared Documents".

2. Click the "X" icon in the "Actions" column.

3. Confirm the delete prompt with "Yes".

4. The download link is now irrevocably removed.

20.6 Retrieve Download Link

You can retrieve the respective download link in the dialog for the Overview of Shared Documents. To do so, complete the following steps:

1. 1. Open the "Overview of Shared Documents" by selecting "Menu > Share > Shared Documents".

2. In the "Actions" column, click the cloud icon.

3. The download link is now automatically copied to the clipboard.

21 Internal Links (Documents / Folders)

To open an archived document, e.g. from an external application (e.g. enterprise resource planning, customer management software...), ecoDMS has a link function. Use it to create links that open the respective document directly when you call the link. You can also call a folder directly in ecoDMS. In this case, ecoDMS Client opens. The copied folder is selected in the folder tree and the matching documents immediately display in ecoDMS.

- The administrator must configure the link settings beforehand in the ecoDMS Settings.
- To do so, refer to the notes and information in this manual: 6.4.1.5.
- The link type depends on your settings. The following are example links for calling documents.

  ```
  dms-link://DESKTOP-5F074KC:17001/openDoc?openmode=1&docid=68&archive=1
  ```

  ```
  http://localhost:17003/openDoc?openmode=1&docid=68&archive=1&host=DESKTOP-5F074KC&port=17001
  ```

  ```
  http://DESKTOP-5F074KC:17004/rest/doc/file?docId=68&archiveId=1
  ```

21.1 Copy Internal Link to Clipboard

- You can copy and paste a link to anywhere (e.g. to the internet browser or other external programmes).

To copy an internal document link to the clipboard, complete the following steps:

1. Select a document

2. Select the function "Copy Internal Link to Clipboard" with one of the following options
   a) Card view: "Actions" tab -> Internal link
   b) Menu -> Actions -> Copy Internal Link to Clipboard
   c) Toolbar: "Internal link" icon
   d) Table view: Preview window ->"Actions" tab -> Internal link
   e) Table view: Right-click -> Copy Internal Link to Clipboard
   f) Keyboard shortcut: CTRL + ALT + L

Figure 21.1: Icon -> Copy Internal Link to Clipboard

21.2 Send Internal Link via Email

- The message window of your default email client opens.
- The link is insert as email text.

To send an internal document link by email, complete the following steps:

1. Select a document

2. Select the function "Copy Internal Link to Clipboard" with one of the following options
   a) Menu -> Actions -> Send Internal Link via Email
   b) Table view: Right-click -> Send Internal Link via Email
   c) Keyboard shortcut: CTRL+ ALT + M

Figure 21.2: Icon - Send Internal Link via Email

21.3 Copy Folder Link to Clipboard

- You can copy and paste a folder link to anywhere (e.g. to the internet browser or other external programmes).
- When you execute the link, ecoDMS opens.
- The copied folder is selected in the folder tree and the matching documents immediately display in ecoDMS.

To copy a folder link to the clipboard, complete the following steps:

1. Select the folder in the ecoDMS folder tree

2. Right-click the folder -> "Link...Copy to clipboard"

21.4 Send Folder Link via Email

- The message window of your default email client opens.
- The link is insert as email text.
- When you execute the link, ecoDMS opens.
- The copied folder is selected in the folder tree and the matching documents immediately display in ecoDMS.

To archive individual email attachments, complete the following steps:

1. Select the folder in the ecoDMS folder tree

2. Right-click the folder -> "Send Link...via Email"

22 Activities and History

ecoDMS documents all modifications to the classification and document assignment. It also records all user actions. This makes all processing and archiving steps traceable. ecoDMS logs every event with date, time and user name.

ecoDMS documents the following user actions with a timestamp and username:
 – Document
   – archive
   – viewed
   – send via email
   – share via internet
   – download / export
ecoDMS also logs the following details for documents shared via internet:
 – User name of the user who shared the documents

 – Time of download (internet user)
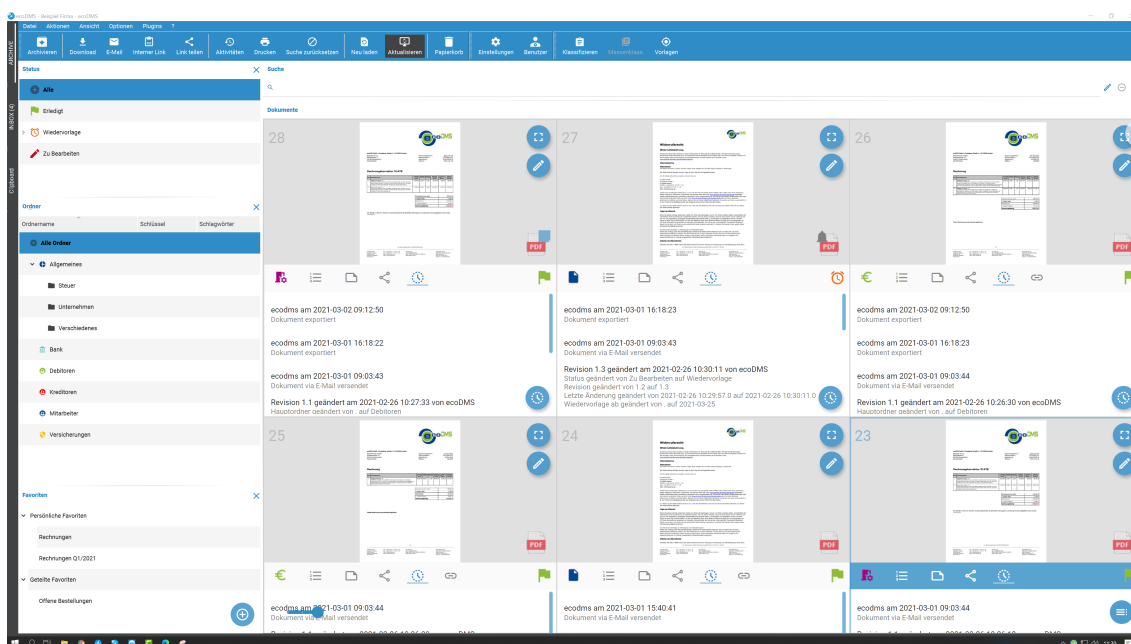
Figure 22.1: Document Activities in the Card View

22.1 Display Activities

To view the document activities, you need to have the necessary system permissions.

There are several options for displaying a document. Choose from the following options:

1. Select a document

a) Card view: Switch to the "Activities" tab in the document card

b) Table view: Switch to the "Activities" tab in the preview window

22.2 Display Document History

> To view the document activities, you need to have the necessary system permissions.

You have several options for displaying the dialog for viewing the document activities. Choose from the following options:

1. Select a document

   a) Card view: "Activities" tab -> "Show document history" icon

   b) Table view: Right-click -> Activities

   c) Table view: Preview window -> "Activities" tab -> "Show Document History" icon

   d) Toolbar: "Activities" icon

Figure 22.2: Document Activities (History) - dialog

23 Erase Documents

- The irrevocable erasure of a file means that all text information in the activities log and the classification is anonymised.
- The document is replaced with an erasure log.
- Access to the erasure log and the anonymised classification is only granted to super administrators with the system permission "View all documents regardless of their permission".

ecoDMS has a multi-step data erasure policy which complies with the legal requirements for "data protection" and the "Generally Accepted Principles of Computerised Accounting Systems in Germany". This allows you to erase users and archived documents. The documents concerned are first moved to the virtual trash in ecoDMS. While taking into account any retention periods, authorised users may permanently erase the documents from there.

23.1 Trash

- If a user is allowed to classify a document, the user also has the permission to move the document to the trash and also restore it from there.
- In this process the files are not deleted but stored in the virtual trash.
- Search functions are also available in the trash.
- Classification is not possible in the trash.
    - To edit the classification, the document needs to be restored from the trash with the restore function.
- **Information about deleting folders:** If documents are moved to the trash, the classification and the folder assignment remain. Should it be necessary to delete the associated folder, all assigned documents in the main view and in the trash must be reclassified to a different folder. To reclassify the documents, you must restore the affected documents first. Reclassifying documents in the trash can is not possible.

Use the "Move to Trash" function to remove documents that are no longer required from the main view (table).

23.1.1 POpen and Exit Trash

Use the trash icon on the ecoDMS toolbar to switch between the standard view and the trash view.

1. Click the blue Trash icon to open the trash
    a) The icon turns red and indicates that you can only see the documents in the trash

2. Click the red Trash icon to exit the recycle bin
    a) The icon is now blue and indicates that you can see the documents from the standard view again

Figure 23.1: Icon - Open / Exit Trash

23.1.2 Move Documents to Trash

To move documents to the trash, you have several options:

1. Select the documents
    a) Press and hold the CTRL key to select several documents at once

2. **Table view:**
    a) Right-click -> Move to Trash
    b) Menu -> File -> Move to Trash
    c) Keyboard shortcut: CTRL + Del

3. **Card view:**
    a) Menu -> File -> Move to Trash

23.1.3 Restore

To restore documents from the trash, you have several options:

1. Select the documents
    a) Press and hold the CTRL key to select several documents at once

2. Right-click -> Restore

3. Menu -> File -> Restore

4. Keyboard shortcut: CTRL + Ins

23.2 Erase Documents

This function requires a license for the full version of ecoDMS but can also be tested in the trial version. This function is not enabled in the Free4Three version.

ecoDMS has an erasure function which allows authorised users with the "The user may erase documents" permission to finally remove documents from the archive with the integrated data erasure policy. Depending on document type and setting, the documents run through multiple steps. In the trash can these steps are arranged in the following categories (tabs):

– Erased

– For review

– For erasure

Data Erasure Policy Steps

1. **Trash**
    a) Documents that are no longer required can be moved to the trash, thus removing them from the main view
        i. Every user with the respective classification permission for those documents can execute this procedure
2. **Consider Retention Period**
    a) A retention period saved with the document prevents the erasure of this document until it has expired
    b) A retention period can be assigned to each document type
3. **Review**
    a) Documents, whose retention period has expired and whose document type requires a review, are submitted to authorised users before they are erased
        i. ecoDMS displays these documents on the "For Review" tab in the trash can
    b) There you can extend the retention period for one or more documents
4. **Release Documents for Erasure**
    a) Following successful review, authorised users can release one or more documents for erasure
    b) After release, ecoDMS displays the documents on the "For Erasure" tab in the trash can
5. **For Erasure**
    a) ecoDMS displays documents that can be irrevocably removed from the archive on the "For Erasure" tab in the trash can
    b) Execute the "Erasure" function to irrevocably erase one or more documents
    c) The erasure process requires the creation of an erasure log
6. **Erased**
    a) The erasure of a file means that all text information in the document history is anonymised
    b) In addition, the actual document is replaced by an erasure log containing a justification
        i. Access to the delete log and the and anonymized classification is only granted to super administrators with the system permission "View all documents regardless of their permission"
        ii. Other users cannot see deleted entries

23.2.1 Review & Release

For each document type you can enable a retention period and a review prior to erasure. ecoDMS displays documents with this setting in the "For Review" tab in the trash can after the retention period has expired.

Tip: By default, the system exclusively displays documents that users moved to the trash can. "Expired" documents, however, can also be located in the main view. These can also be displayed on the "For Review" tab. To do so, disable the "In the Trash" checkbox in the trash can. ecoDMS then displays the "expired" documents from the main view and from the trash can.

23.2.1.1 Check Documents and Retention Periods

To review and extend the retention period, complete the following steps:

1. Select one or more documents on the "For Review" tab in the Trash. Press and hold the CTRL key to select several documents
    a) Right-click -> Retention Periods
    b) Menu -> File -> Retention Periods

2. A dialog shows the settings for the retention periods of the selected documents
    a) Click an entry to display details about the retention period

3. If you do not need to make modifications, you can simply close the dialog
    a) Otherwise you can modify the retention period for the selected entries in this dialog
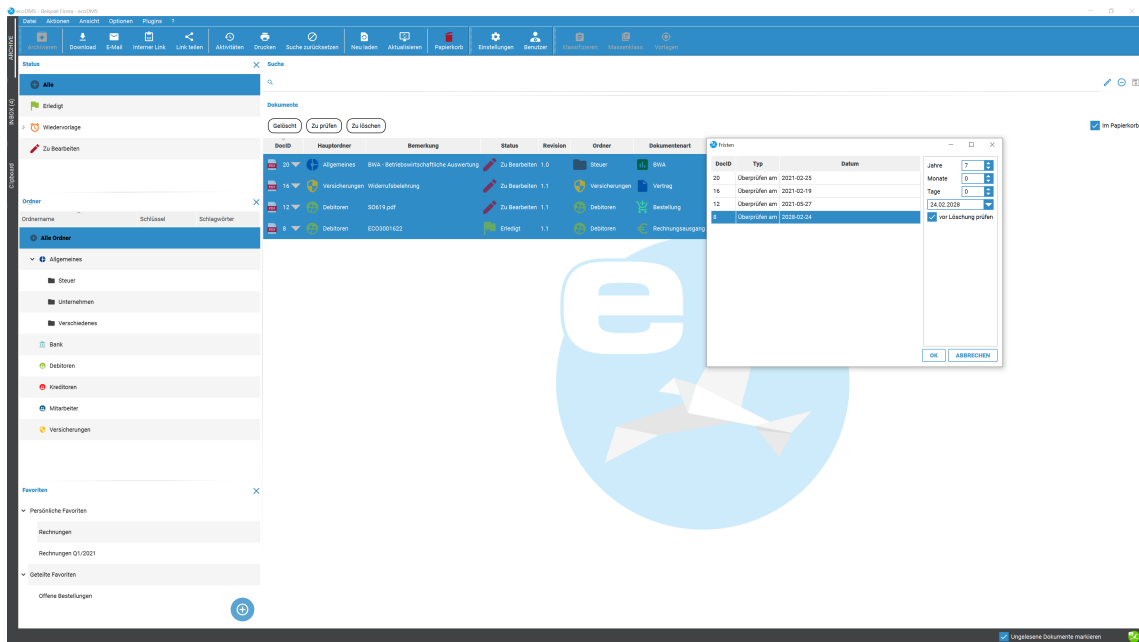
Figure 23.2: Trash - Check Documents and heir Retention Periods

23.2.1.2 Release

After reviewing the documents for erasure, you can release them for erasure. To do so, complete the following steps:

1. Select one or more documents on the "For Review" tab in the trash can.

2. Right-click -> Release for Erasure

3. ecoDMS removes the documents from the "For Review" tab and displays them on the "For Erasure" tab.
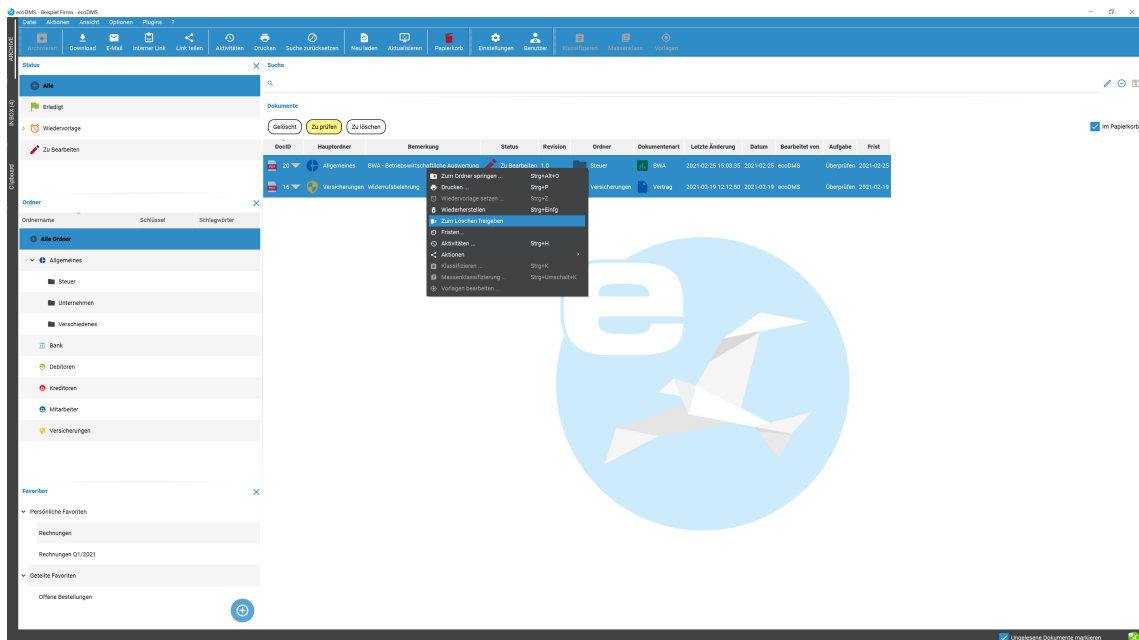
Figure 23.3: Trash: Release Documents For Erasure

23.2.2 Erasure

The documents released for erasure are listed on the "For Erasure" tab in the trash can. From here you can erase one or more documents from the archive and ecoDMS replaces the erased documents with an erasure log. To do so, complete the following steps:

1. Select one or more documents on the "For Erasure" tab in the trash can.

2. Right-click -> Erasure.

3. A dialog displays "Erase Document Irrevocably".

   a) **PIN-CODE:** Enter the pin code.
   b) **Confirm PIN-CODE:** Enter the code highlighted in red.
   c) **Reason for erasure:** Enter a distinct justification for the delete process.

   > This information is then displayed together with the erasure date, the erasure time and the user in an erasure log in place of the document.

   d) Confirm the erasure process by pressing "OK" or abort the process by pressing "Cancel".
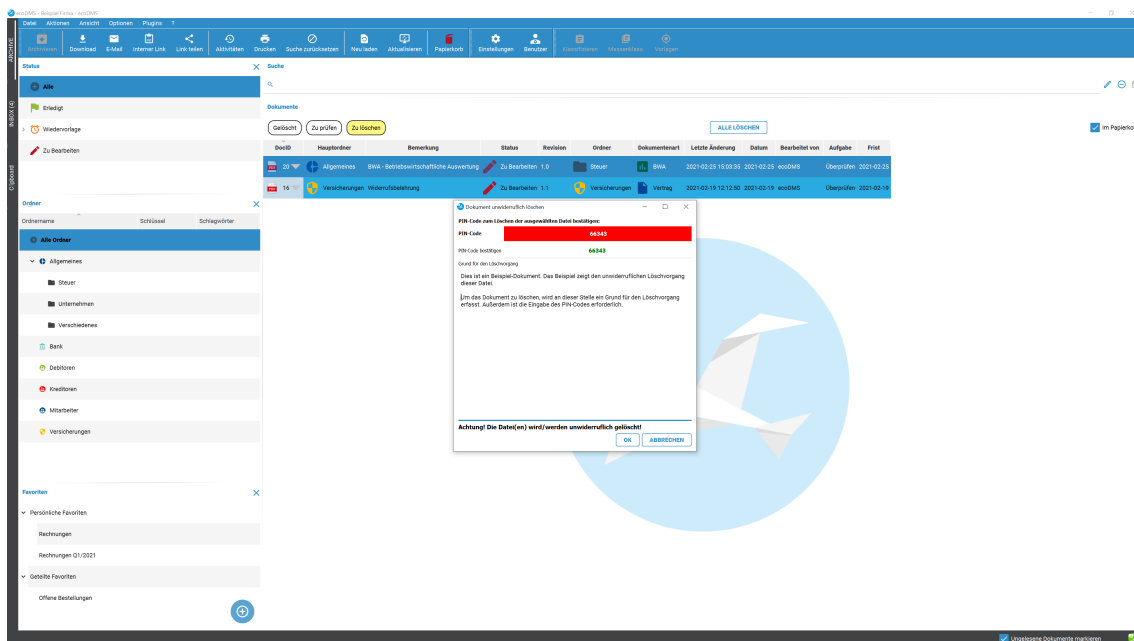
Figure 23.4: Trash: Create Erasure Log

4. ecoDMS removes the selected documents from the "For Erasure" tab and moves them to the "Erased" tab, which can be viewed by authorised users.

> Only users with the system permission "The user may view all documents regardless of their permission" (ecoSIMSALLDOCS) have access to the erasure logs and the remains of the associated classification. For all other users these entries are no longer visible.
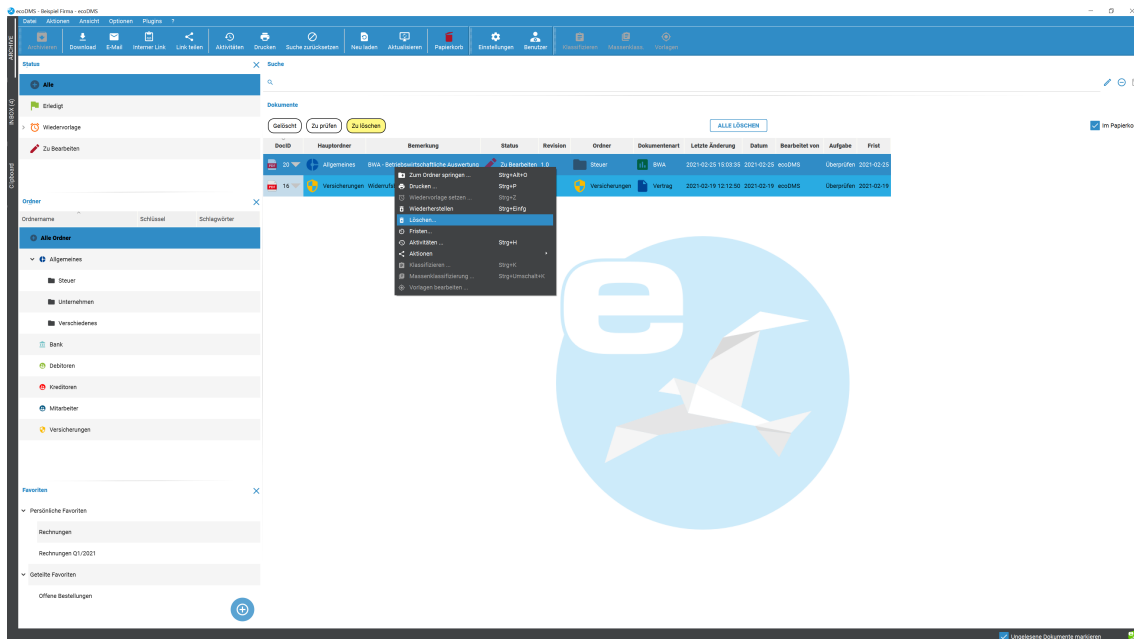
Figure 23.5: Trash: Erase Documents (Select Function)
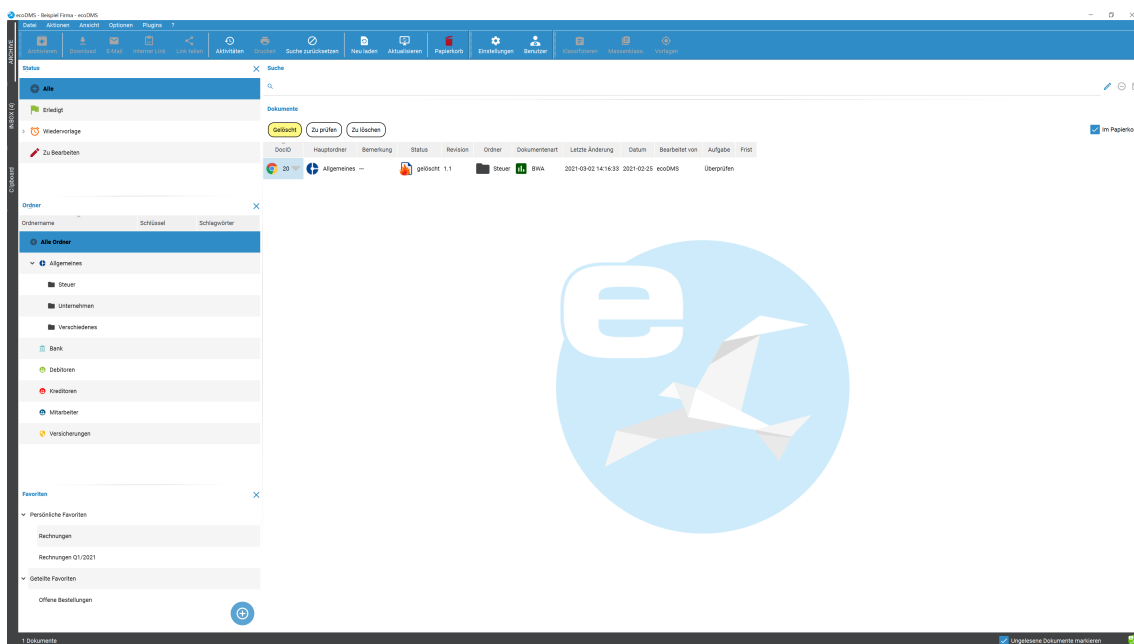
Figure 23.6: Trash: Erased Documents

23.2.3 View Erasure Log

When a file is irrevocably erased, it is replaced by the erasure log. In the classification and history, all text information is also anonymised. The comment box in the classification dialog is an example for such a text box. Only users with the system permission "The user may view all documents regardless of their permission" (ecoSIMSALLDOCS) have access to the entries in the "Erased" tab of the trash can. To view an erasure log, complete the following steps:

1. Select the document you want to view on the "Erased" tab of the trash can.

2. Execute the "Display" function,
    a) for example by double-clicking the Doc ID or right-clicking and selecting -> Display.

3. The erasure log is an HTML page. It opens in your default internet browser.
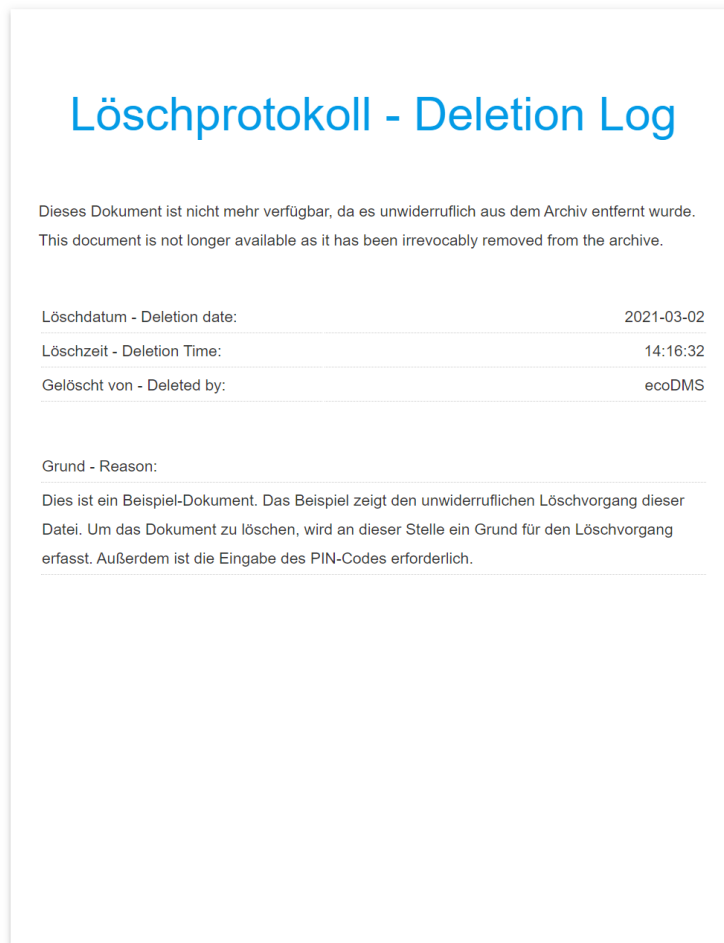
Figure 23.7: Trash: Erasure Log

24 Send Document via Email
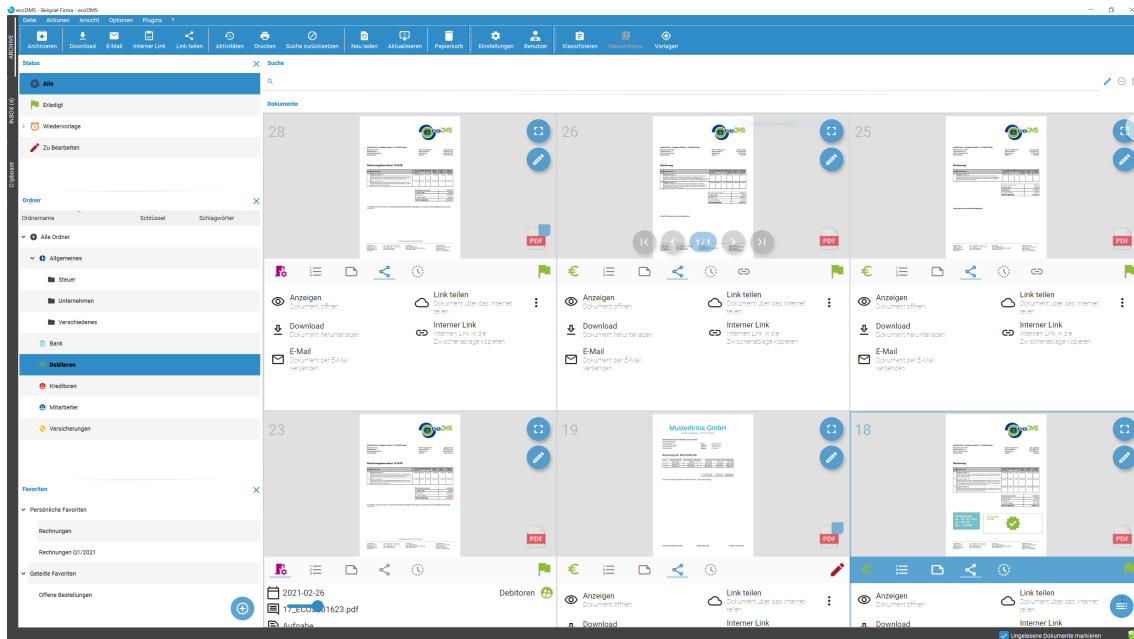
Figure 24.1: Actions - Send Document via Email

To send archived documents from ecoDMS as email attachments, complete the following steps:

1. Select

> – Depending on the application, you cannot send attachments directly from ecoDMS. This is not an error in ecoDMS. For more information on this topic for Ubuntu, please refer to https://bugs.launchpad.net/ubuntu/+source/xdg-utils/+bug/1019259. As a workaround, the administrator can deposit a script for opening the mail client in the settings dialog, where it is available for all users (c.f. "Settings" chapter).
>
> – You can only rename the email attachment before sending if you have a Windows client.

the documents

    a) Press and hold the CTRL key to select several documents at once

2. Select the function "Send Document via Email" with one of the following options

    a) Card view: "Actions" tab - Send Document via Email

    b) Menu -> Actions -> Send Document via Email

    c) Toolbar: "Email" icon

    d) Table view: Preview window ->"Actions" tab - Send Document via Email

    e) Table view: Right-click -> Actions -> Send Document via Email

    f) Keyboard shortcut: CTRL+ M

3. If you are using Windows as your operating system, you can now rename the file

    a) To rename a file, simply double-click the name, enter the new name and confirm with "Enter"

b) Confirm your entries with "OK" to continue, or abort the process with "Cancel"

4. ecoDMS opens the default email programme of your computer and attaches the file in the message window

Figure 24.2: Icon - Send Document via Email

25 Resubmission

In ecoDMS you can set a resubmission date for documents that are needed at a later date. To do so, simply select the "Resubmission" status in the classification and save the scheduled date. ecoDMS then highlights the documents in time for processing. ecoDMS can also highlight documents for resubmission when you open the programme. In the period in which documents are set for resubmission, ecoDMS reminds you to process them when you open the programme. The responsible ecoDMS administrator can apply this setting to all users in the settings dialog.

Reminder Phases
ecoDMS reminds you of the document shortly before the deadline. When this is the case, a resubmission icon is displays for the DocID. The document also displays automatically under the "To Do" status before the deadline. In the table view, the document row is also highlighted in Color.

Icon and Color	Days untill Resubmission
keins	>7
	<=7
	<=3
	<1 (in addition, the document appears under the status "ToDo")
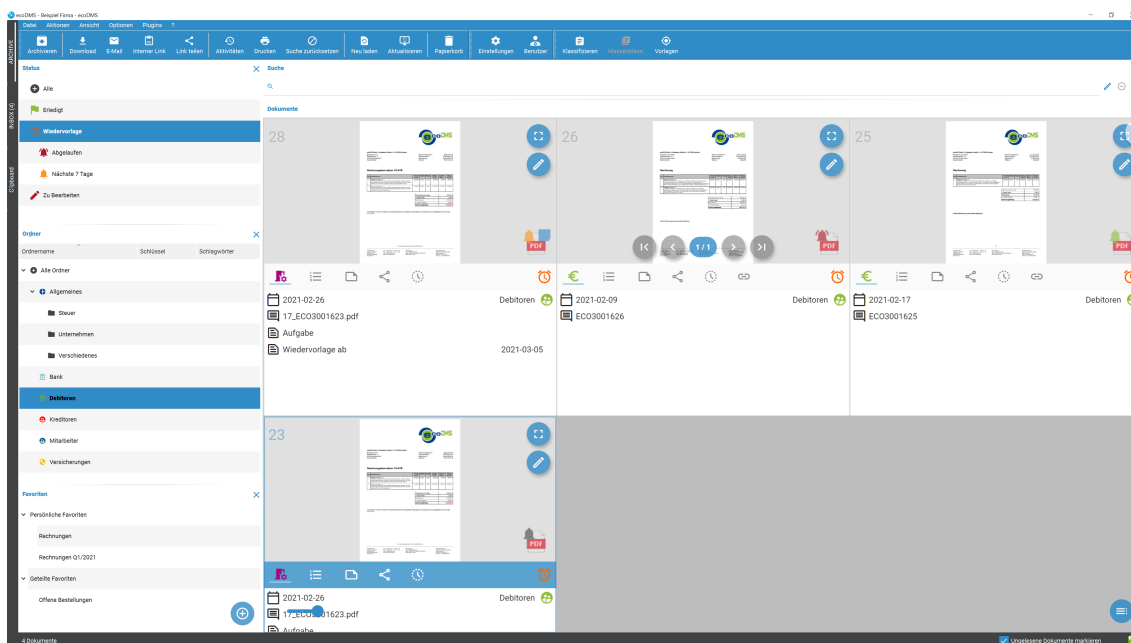
Figure 25.1: Resubmission phases (Here: Card View)

25.1 Set Resubmission Date

There are several options for resubmitting a document: Choose from the following options:

1. Classification dialog:
   a) Open the Classification dialog of the respective document
   b) Set the status to "Resubmission"
   c) Select the resubmission date in the calendar and confirm your entry with "OK"

2. Menu:
   a) Select the documents.
      i. Press and hold the CTRL key to select several documents at once
   b) Click "File - Set Resubmission" in the menu or
   c) Select the resubmission date in the calendar and confirm your entry with "OK"

3. Table view:
   a) Select the documents.
      i. Press and hold the CTRL key to select several documents at once.
   b) Right-click - Set Resubmission
   c) Select the resubmission date in the calendar and confirm your entry with "OK"

4. Status window (drag & drop):
   a) Select the documents.
      i. Press and hold the CTRL key to select several documents at once.
   b) Drag and drop documents to the "Resubmission" status
   c) Select the resubmission date in the calendar and confirm your entry with "OK"
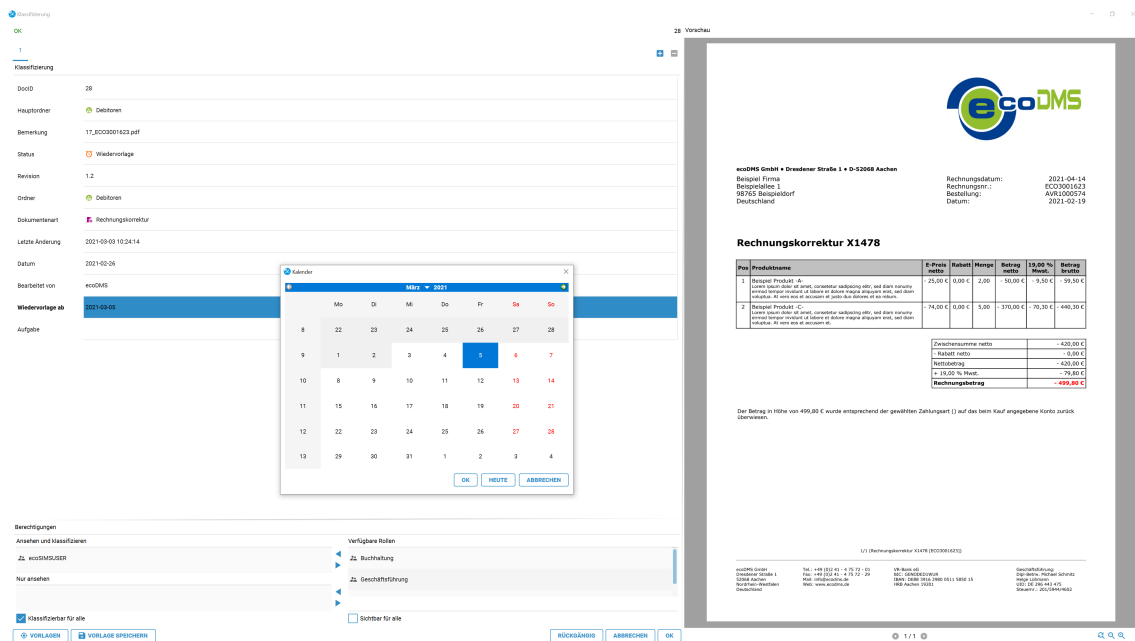
Figure 25.2: Set Resubmission Date (Here: Classification dialog)

25.2 Display Resubmissions on Launch

When you launch ecoDMS, pending resubmissions can be displayed in a dialog. The administrator can enable this dialog for all users in the settings dialog. To display the resubmissions when launching the programme, refer to the chapter "Settings -> Settings - Display Resubmissions on Launch".
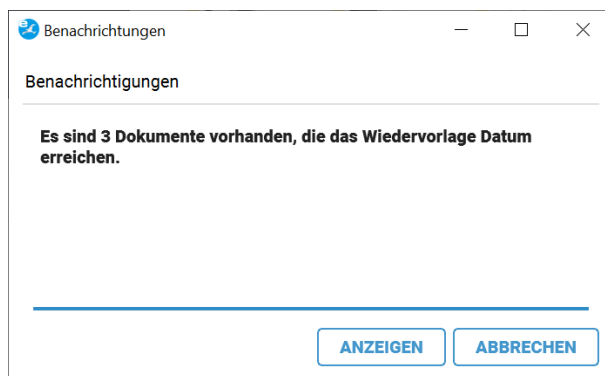
Figure 25.3: Display Resubmission on Launch (Here: Notification)

26 Print Documents

> – The documents must be printable files.
>
> – The necessary programmes to open the files must be on your computer.
>
> – This function is only available under Windows.
>
> – To start the printing process, the documents are opened consecutively and then closed automatically.

Selected documents can be printed on paper straight from ecoDMS. To do so, there is a print function in ecoDMS under Windows. Click the following menu items to call the print function:

1. Select the documents.
   a) Press and hold the CTRL key to select several documents at once.

2. Select the "Print" function using one of the following options:
   a) Toolbar: "Print" icon
   b) Menu -> File -> Print
   c) Table view: Right-click -> Print
   d) Keyboard shortcut: CTRL + P

Figure 26.1: "Print" icon

27 Snapshot

The "Snapshopt to Archive" feature allows you to create screen shots on your computer and archive them straight to ecoDMS. The feature is in the ecoDMS Connection Manager, where you can access it by keyboard shortcut. You can make snap shots of all areas of a screen. When archiving, ecoDMS stores the image as a searchable PDF. Recognizing classification templates is also possible in this context.

27.1 Configure Snapshot Shortcut

To use the snapshot feature, you need a keyboard shortcut. To create a shortcut, complete the following steps:

1. Open the Connection Manager to manage the profiles (refer to manual: 4.1)

2. Click "Settings"

3. Assign a keyboard shortcut for the snapshot feature of ecoDMS (for example: Alt Gr + F8)

4. Click "OK" to save the settings or click "Cancel" to abort the process
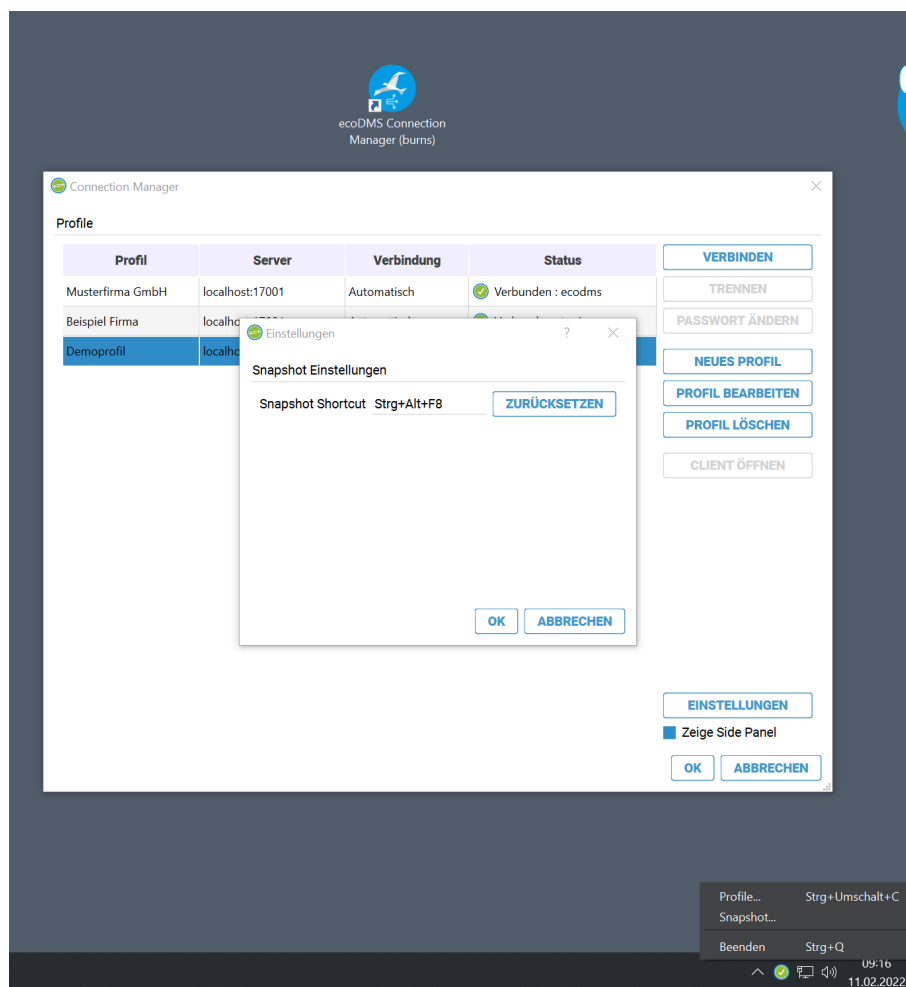
Figure 27.1: Snapshot - Settings for Assigning a Shortcut in the Connection Manager

27.2 Create Snapshot

To create a snapshot on your screen, comlete the following steps:

1. Open the application or website where you want to create a snapshot.

2. Press the configured shortcut for "Snapshot 2 Archive"

3. The screen is highlighted

4. Now select the area you want to snapshot by holding the mouse button, or press ESC to cancel

5. ecoDMS creates a snapshot of the highlighted section in white and opens the classification dialog box

6. Fill in the classification information

   a) If the snapshot matches an existing classification template, automatic classification / archiving is also available (refer to: 11)

7. When archiving, ecoDMS stores the snapshot image as a searchable PDF so you can use readable information in full-text searches
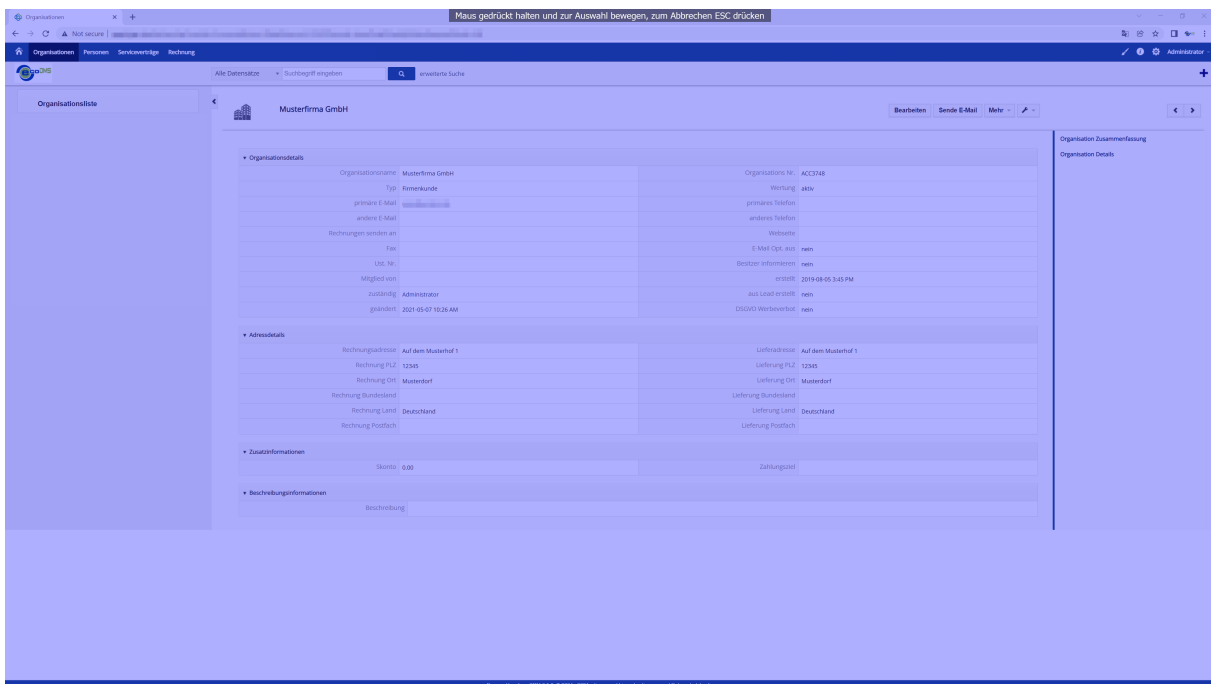
Figure 27.2: Snapshot - Highlighted Screen after Entering the Shortcut
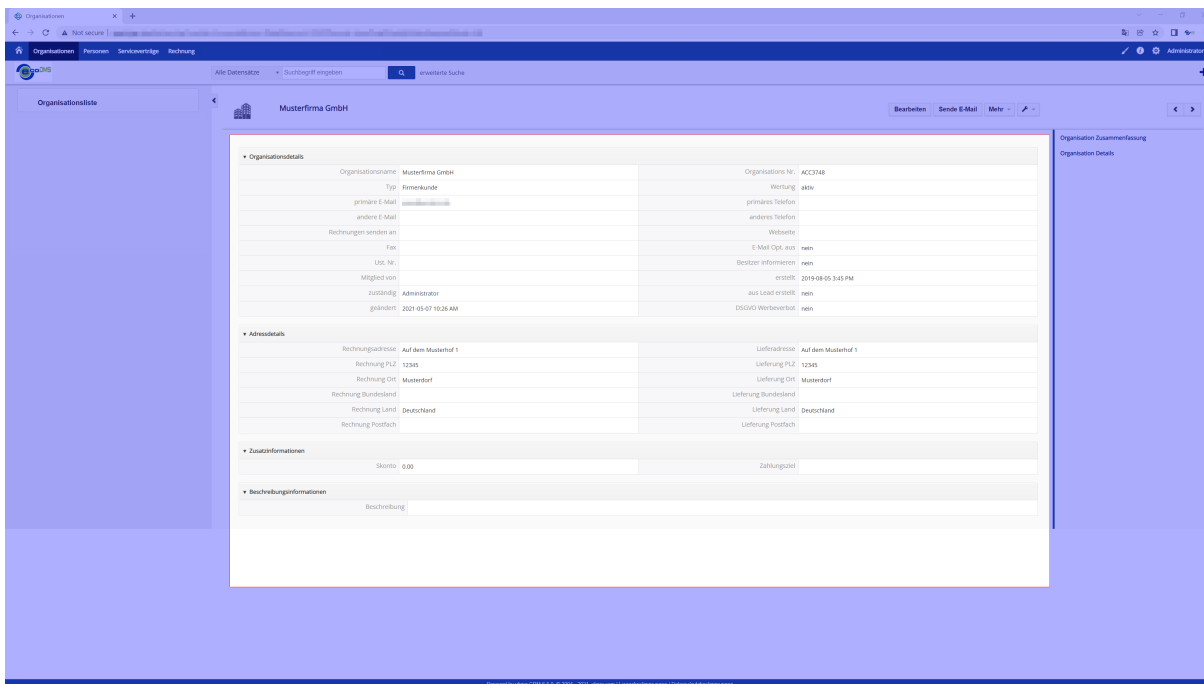
Figure 27.3: Snapshot - Selected Area for Archiving in ecoDMS
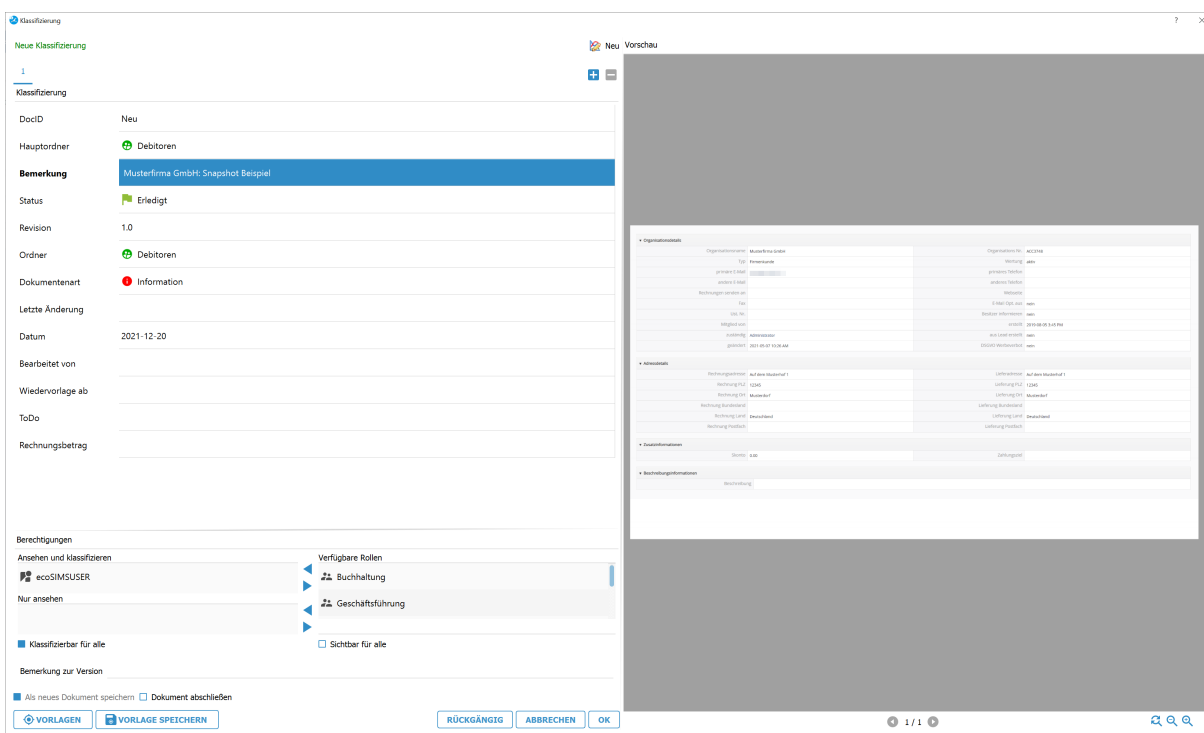
Figure 27.4: Snapshot - Classification of the Selected Area for Archiving in ecoDMS

28 Backup

ecoDMS includes various functions for backing up data. You can backup your data manually or the system can create a backup fully automatically. Depending on the operating system and your own needs, you can choose from individual backup functions in ecoDMS.

1. We recommend you backup your data every day.

2. You should store the data backup on an external data carrier.

3. While you run the data backup, no other users should be working with ecoDMS or be connected to ecoDMS Server.

4. The size and the time to complete the backup depends on the amount of data / data size. Depending on the data volume this operation can take a while.

5. Ensure that enough space is available on the destination path to save your backup.

6. ecoDMS saves all settings, user data and classifications in a database.
   a) We use the free, cross-platform postgreSQL component as a database.
   b) The archived files and documents are stored safely encoded in containers within the user's ecoDMS server.

7. The default data volume of such a container is approx. 500 MB. This is a fixed value specified by ecoDMS.
   a) As soon as the data volume is reached, the system automatically creates a new container.

8. During the backup process the containers can be backed up separately and independent of the postgreSQL database.

9. In the settings dialog, you can configure automated, time-controlled backups.
   a) ecoDMS then performs the backup automatically at the specified time.
   b) Data backups can be configured as required.
      i. For example, you can make a full backup of the entire database and the containers.
      ii. Alternatively, you can also make an incremental data backup. In this case ecoDMS will complete the existing backup with the latest changes in the selected rhythm.

10. The oneClick Backup component is an inherent part of ecoDMS Server installation.
    a) With a mouse-click you can manually initiate a full backup of the entire database and container.
    b) The generated backup file (.zip) can be used to restore data if necessary.

11. As an option, the backup and restore function can also be carried out via console applications.
    a) To do this, either use the integrated ecoDMS script or create your own scripts to call this function.

12. We recommend you completely clear the Inbox before backing up your data.
    a) Background: If the backup is restored on a different operating system (e.g. Windows -> Linux), the paths to the files in the Inbox are no longer correct. You can only delete them from the server via the dialog which displays.

28.1 Automatic Backup

In the settings dialog, you can configure automated, time-controlled backups. ecoDMS then performs the backup automatically at the specified time. Data backups can be configured as required. For example, you can make a full backup of the entire database and the containers. Alternatively, you can also make an incremental data backup. In this case ecoDMS will complete the existing backup with the latest changes in the selected rhythm.
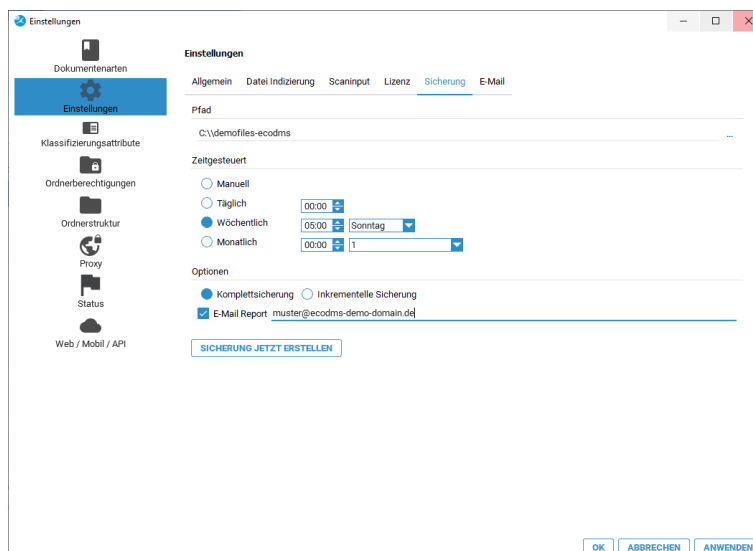
Figure 28.1: Settings dialog - Backup

This section describes possible settings for automatic backup.

1. Click "Options - Settings" in ecoDMS Client.

2. Now click "Settings" and open the "Backup Tab".

   a) Make the required settings in this window.

3. **Path for Windows and Linux distributions:** Select the target path for saving backups. ecoDMS saves the backups you create in the selected folder. ecoDMS Server provides the local data carriers for storing backups.

   a) **Target Path for NAS systems via Docker image:** If you want to use the ecoDMS backup and restore function on your NAS, you require a folder for backup and restore (see installation manual). The backup and restore folders should be stored separately from the actual ecoDMS data and backed up accordingly. The mount paths are:

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

      i. In the settings dialog of ecoDMS Client, select the "/srv/data/backup" path on the "Backup" tab and confirm with a double-click.

      ii. The Path box should then display the entry "/srv/data/backup".

4. Select the intervals for your data backup.

   a) **Manually:** Enable this setting to manually start the data backup. In this case the backup is created when you click the "Create Backup Now" button.

   b) **Daily:** Enable this setting to execute the backup process every day at the same time.

      i. Enter the time at which you want ecoDMS to backup the data.

   c) **Weekly:** Enable this setting to execute the backup process every week on the same day and at the same time.

      i. Enter the time at which you want ecoDMS to backup the data.

      ii. Select the weekday.

   d) **Monthly:** Enable this setting to execute the backup process every month on the same day and at the same time.

      i. Enter the time at which you want ecoDMS to backup the data.

      ii. Select the day of the month.

5. Enable the type of backup you require. For example, you can make a full backup of all containers. Alternatively, you can also make an incremental data backup.

a) **Full backup:** If you enable a full backup, ecoDMS executes a backup of all containers at the specified time.

    i. The backup file is saved in the selected folder as a ZIP file.

    ii. The duration of the data backup depends on the data volume of the archived files and the information.

    iii. This type of data backup may be relatively time-consuming because ecoDMS makes a full backup of the database and all containers.

b) **Incremental backup:** If you enable the incremental backup, ecoDMS executes the data backup step-by-step. In this case ecoDMS completes the existing backup with the latest changes in the selected intervals.

    i. The incremental backup only saves the data that was changed or added since the last backup.

    ii. If you execute the incremental backup, ecoDMS creates five files/folders plus subfolders in the target folder of the backup:

        A. data, ocr, workdir, backup.sql, version

        B. These files/folders are extended during the next incremental backup and must therefore not be moved, renamed or deleted.

    iii. The backup file is saved in the selected folder as an unzipped folder.

    iv. To restore this incremental backup again,

        A. select these files/folders

        B. and create a ZIP file via the context menu.

    v. You can use this ZIP file to restore the entire ecoDMS archive.

    vi. The duration of the data backup depends on the size of the archived files and the information.

    vii. The first execution of the incremental backup may take longer because ecoDMS makes a full backup of the entire database and all available containers.

        A. ecoDMS then adds the latest changes and new data to the existing backup in the specified rhythm.

6. **Email Report:** If you enable this function, ecoDMS sends a process report to the specified recipient after the backup has been executed. You must enter the mail server information on the "Email" tab in the settings dialog (Options - Settings - Settings - Email). ecoDMS sends a report to the recipient(s) via email as soon as the backup has finished.

a) Enter the recipient email address in the entry box. For example:

```
sample@demomail.de
```

b) Separate several email recipients with a semicolon ";". Example:

```
first@demomail.de;second@demomail.de
```

7. **Create backup now:** Click "Create Backup Now" to immediately start the configured data backup (full or incremental backup) regardless of the set interval.

8. Save your settings by clicking "Apply" or abort the process with "Cancel"

9. To close the settings dialog, click the "OK" button.

28.2 Backup under Windows

In the following the data backup process is described for Windows systems.

28.2.1 oneClick Backup (Software)

The ecoDMS oneClick Backup software is an inherent part of ecoDMS Server. With a mouse-click you can manually initiate a full backup of the entire database and container. In this case, the entire ecoDMS database, including all documents, structures, settings, users and attributes etc. are saved in a ZIP file. The generated backup file (.zip) can be used to restore data if necessary.

1. Make sure that no other users are working with ecoDMS or are connected to ecoDMS Server.

    a) First, exit all Connection Managers connected to the server.

    b) Check and close all other connections to the server (e.g. web client...).

2. Start the "oneClick Backup" programme via "Start -> Programme -> ecoDMS Server -> oneClick Backup"

3. The dialog "oneClick Backup & Recovery" window opens.

4. Click the "..." button to select a destination folder for the data backup. After the data backup has successfully executed, the backup data is stored in a Zip file in the destination folder.

5. You can specify the compression type in the "Compression" area.

    a) Default

> Automatic Mode: In this mode, the system automatically specifies a compression rate.

    b) Best speed:

> The backup is compressed faster than in the default speed. However, in this mode the zip file is larger than in the default mode.

    c) Best compression:

> The backup data is compressed to the smallest possible size. Because of the extreme compression, this backup setting needs much more time than the Default and the Best Speed modes.

    d) No compression:

> The backup is generated without compression. This is the fastest data backup option. Because the data is not compressed, the completed backup might have a very big data volume and therefore it requires a lot of storage space.

6. Click "Start Backup" to start the data backup.

> a) The duration of the backup depends on the data volume and the system environment. For large data volumes, the backup can take a long time.
> b) The operation is complete when "Finished..." is displayed in the last output line in the dialog.

7. Click "Exit" to close the programme.

8. If the operation was successful, you can reconnect the Connection Manager and all other connections to ecoDMS Server.

Figure 28.2: oneClick Backup & Restore: Creating Backup

28.2.2 Console Programme for Data Backup

- You must have administrator rights for this programme.
- When the execution runs via the "task planning", you must select the option "Execute with highest privileges".
- Once the server is installed, the programme is located in ecoDMS Server folder.
- You can reimport the backup via "ecoDMS oneClick Backup".

If ecoDMS Server is installed under Windows, a console backup programme is automatically supplied with the oneClick Backup programme. This can be used, for example, for automatic, time-controlled backups [2, 3, 1].

1. Make sure that no other users are working with ecoDMS or are connected to ecoDMS Server.
   a) First, exit all Connection Managers connected to the server.
   b) Check and close all other connections to the server (e.g. web client...).

2. Syntax-Request:

```
ecoDMSBackupConsole.exe [Backup-Save-Path] [optionally: Compression Rate]
```

3. Parameters:
   - /h displays the programme syntax.
   - Parameter 1 must be a valid folder path. The backup is saved in this folder.
   - Parameter 2 is optional. The compression rate can be selected here.
     - If no parameter is set, the data is zipped with the "default" compression.

    – You can select the following values. The "OneClick Data Backup" chapter provides further explanations.
        * best (best compression)
        * bestspeed (best speed)
        * no (no compression)

4. If the operation was successful, you can reconnect the Connection Manager and all other connections to ecoDMS Server.

28.3 Backup under Linux
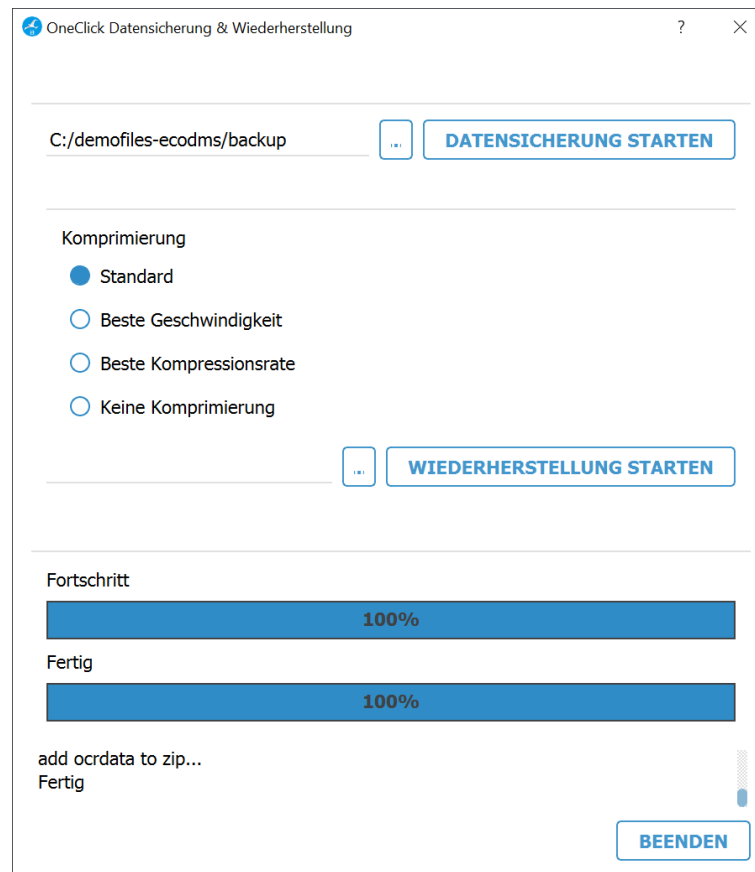
In the following the data backup process is described for Ubuntu / Debian systems.

28.3.1 oneClick Backup (Software)

The ecoDMS oneClick Backup software is an inherent part of ecoDMS Server. With a mouse-click you can manually initiate a full backup of the entire database and container. In this case, the entire ecoDMS database, including all documents, structures, settings, users and attributes etc. are saved in a ZIP file. The generated backup file (.zip) can be used to restore data if necessary.

1. Make sure that no other users are working with ecoDMS or are connected to ecoDMS Server.
    a) First, exit all Connection Managers connected to the server.
    b) Check and close all other connections to the server (e.g. web client...).

2. Start the "ecoDMS oneClick Backup" programme as "root" user via the console or via the programme manager:
    a) If you start the programme via the console, you must execute the following command as **root**

    ```
    /opt/ecodms/ecodmsserver/tools
    ```

3. The dialog "oneClick Backup & Recovery" window opens.

4. Click the "..." button to select a destination folder for the data backup. After the data backup has been successfully executed, the backup data is stored in a Zip file in the destination folder.

5. You can specify the compression type in the "Compression" area.
    a) Default

    > Automatic Mode: In this mode, the system automatically specifies a compression rate.

    b) Best speed:

    > The backup is compressed faster than in the default speed. However, in this mode the zip file is larger than in the default mode.

    c) Best compression:

    > The backup data is compressed to the smallest possible size. Because of the extreme compression, this backup setting needs much more time than the Default and the Best Speed modes.

d) No compression:

> The backup is generated without compression. This is the fastest data backup option. Because the data is not compressed, the completed backup might have a very big data volume and therefore it requires a lot of storage space.

6. Click "Start Backup" to start the data backup.

> a) The duration of the backup depends on the data volume and the system environment. For large data volumes, the backup can take a long time.
>
> b) The operation is complete when "Finished..." is displayed in the last output line in the dialog.

7. Click "Exit" to close the programme.

8. If the operation was successful, you can reconnect the Connection Manager and all other connections to ecoDMS Server.

Figure 28.3: oneClick Backup & Restore: Creating Backup

28.3.2 Console Programme for Data Backup

When installing ecoDMS Server, a file called "ecoDMSBackupConsole" is stored under Ubuntu/Debian in the /opt/ecodms/ecodmsserver/tools folder. When this script executes, it creates a backup of the folder /opt/ecosims/workdir and creates a dump for the database (backup.sql). The files are then saved in a pre-defined destination folder as a zip-file [2, 3, 1].

1. Make sure that no other users are working with ecoDMS or are connected to ecoDMS Server.
   a) First, exit all Connection Managers connected to the server.
   b) Check and close all other connections to the server (e.g. web client...).

   The following commands must be run as root.

2. 2. For data backup, enter the following command at /opt/ecodms/ecodmsserver/tools:

```
./ecoDMSBackupConsole /TargetPath [best|bestspeed|no]
```

   a) The brackets contain the optional parameters for the compression. The degree of compression influences the duration of the compression process.

        i. best: the backup is packed with the highest degree of compression

        ii. bestspeed: the backup is packed with the fastest compression

        iii. no: the backup is packed without compression

        iv. If no parameter is given, the data is packed with the default compression.

3. The backup can be recovered as a zip-file using the oneClick Backup, or manually after the zip-file has been extracted.

28.4 Backup under Synology (NAS)

The following describes how to backup ecoDMS data on a Synology NAS system [2, 3, 1].

1. Start the ecoDMS container if it is not already running.

2. Make sure that no other users are working with ecoDMS or are connected to ecoDMS Server.
   a) First, exit all Connection Managers connected to the server.
   b) Check and close all other connections to the server (e.g. web client...).

3. Open the "backup" folder in the "File Station" of the ecoDMS data folder.

4. Create an empty file "create" and upload it to the "backup" folder.

5. Backup will start automatically after a few seconds.

6. The system then automatically saves the finished backup file in this folder.

7. The system automatically deletes the "create" file after the backup has been processed successfully.

Figure 28.4: Synology - Create Backup

28.5 Backup under QNAP (NAS)

The following describes how to backup ecoDMS data on a Synology QNAP system.

1. Start the ecoDMS container if it is not already running.

2. Make sure that no other users are working with ecoDMS or are connected to ecoDMS Server.
    a) First, exit all Connection Managers connected to the server.
    b) Check and close all other connections to the server (e.g. web client...).

3. Open the "backup" folder in the "File Station" of the ecoDMS data folder.

4. Create an empty file "create" and upload it to the "backup" folder.

5. Backup will start automatically after a few seconds.

6. The system then automatically saves the finished backup file in this folder.

7. The system automatically deletes the "create" file after the backup has been processed successfully.
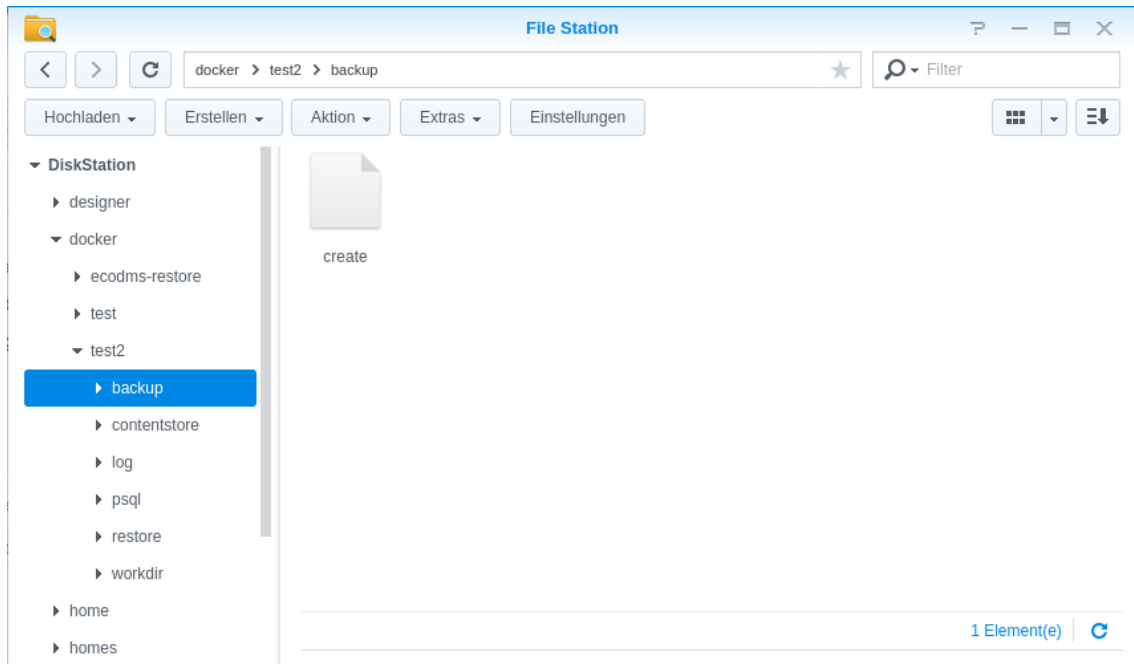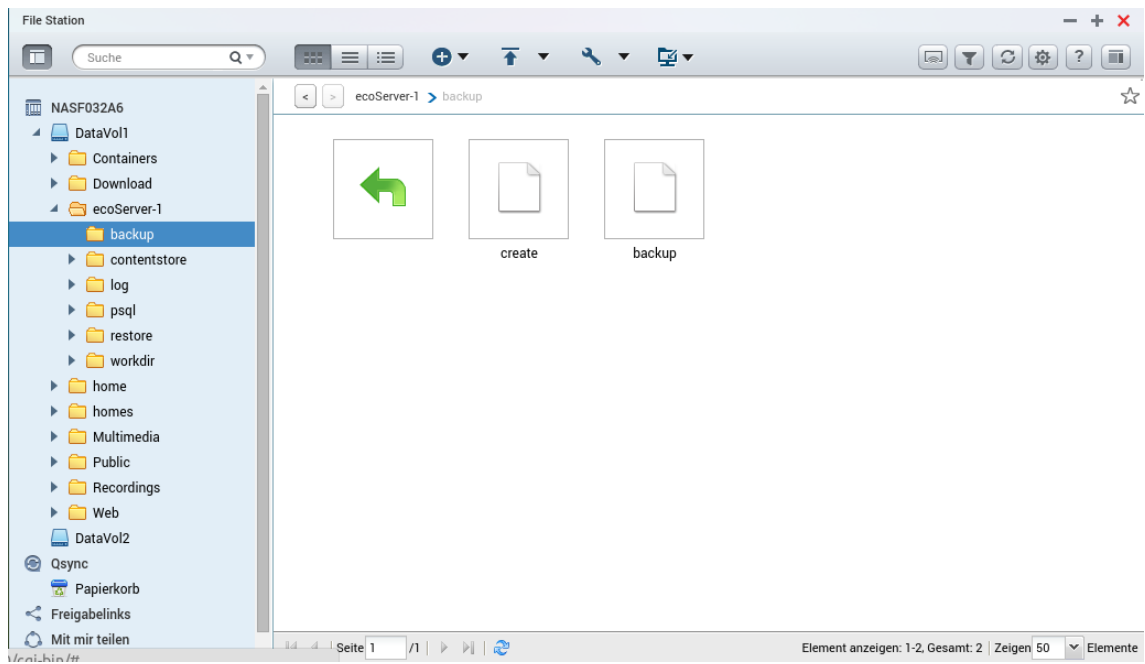
Figure 28.5: QNAP - Create Backup

29 Restore

We recommend you backup your data every day. To do so, you have various options. Under Windows, ecoDMS contains its own user interface to manually backup and restore your data. The backup can also be executed manually with scripts or with your own tools. In this case, you must make a backup of the entire ecoDMS Server folder. If the database is installed separately, it also needs a backup.

1. During the data recovery process, ecoDMS Server is stopped. For this reason, no user should be connected with the system.

2. When the data recovery is imported, the existing data store is deleted irrevocably.

3. The duration of the recovery process depends on the data volume and the system environment. The recovery process may take longer for large data volumes.

4. If you want to restore your data based on an incremental backup, you must first create a ZIP file from the following data of your backup:
   a) data, ocr, workdir, backup.sql, version
      i. select these files/folders
      ii. and create a ZIP file via the context menu.
   b) This ZIP file can then be used for the recovery process.

29.1 Restore under Windows

In the following the data backup process is described for Windows systems.

29.1.1 oneClick (Software)

Use "oneClick Backup" to reimport your ecoDMS data. This programme is automatically installed as well when you install the "ecoDMS Server" [1].

1. Make sure that no other users are working with ecoDMS or are connected to ecoDMS Server.

   a) First, exit all Connection Managers connected to the server.

   b) Check and close all other connections to the server (e.g. web client...).

2. Start the "oneClick Backup" programme via "Start -> Programme -> ecoDMS Server -> oneClick Backup"

3. The dialog "oneClick Backup & Recovery" window opens.

4. Click "..." button to select the zip file with the data backup.

5. Click the "Start Recovery" button to start the data backup.

6. Read the confirmation prompt and confirm with "Yes".

   a) **Please note that a positive confirmation of this message deletes the current database and replaces it with the backup.**

   b) The duration of the recovery depends on the data volume and the system environment. For large data volumes, the recovery can take a long time.

   c) The operation is complete when "Finished..." is displayed in the last output line in the dialog.

7. If the operation was successful, you can reconnect the Connection Manager and all other connections to ecoDMS Server.

Figure 29.1: oneClick Backup & Restore: Restoring Data

29.2 Restore under Linux

In the following the data recovery process is described for Ubuntu / Debian systems.

29.2.1 oneClick (Software)

Use "oneClick Backup" to reimport your ecoDMS data. This programme is automatically installed as well when you install the "ecoDMS Server" [1].

1. Make sure that no other users are working with ecoDMS or are connected to ecoDMS Server.
    a) First, exit all Connection Managers connected to the server.
    b) Check and close all other connections to the server (e.g. web client...).

2. Start "ecoDMS oneClick Backup" as root in your console or use the software manager:
    a) Software manager:

Figure 29.2: Open ecoDMS oneClick Backup

   b) Console: The following command must be run as root:

```
/opt/ecodms/ecodmsserver/tools
```

3. The dialog "oneClick Backup & Recovery" window opens.

4. Click "..." button to select the zip file with the data backup.

5. Click the "Start Recovery" button to start the data backup.

6. Read the confirmation prompt and confirm with "Yes".

   a) **Please note that a positive confirmation of this message deletes the current database and replaces it with the backup.**

   b) The duration of the recovery depends on the data volume and the system environment. For large data volumes, the recovery can take a long time.

   c) The operation is complete when "Finished..." is displayed in the last output line in the dialog.

7. Click "Exit" to close the programme.

8. If the operation was successful, you can reconnect the Connection Manager and all other connections to ecoDMS Server.
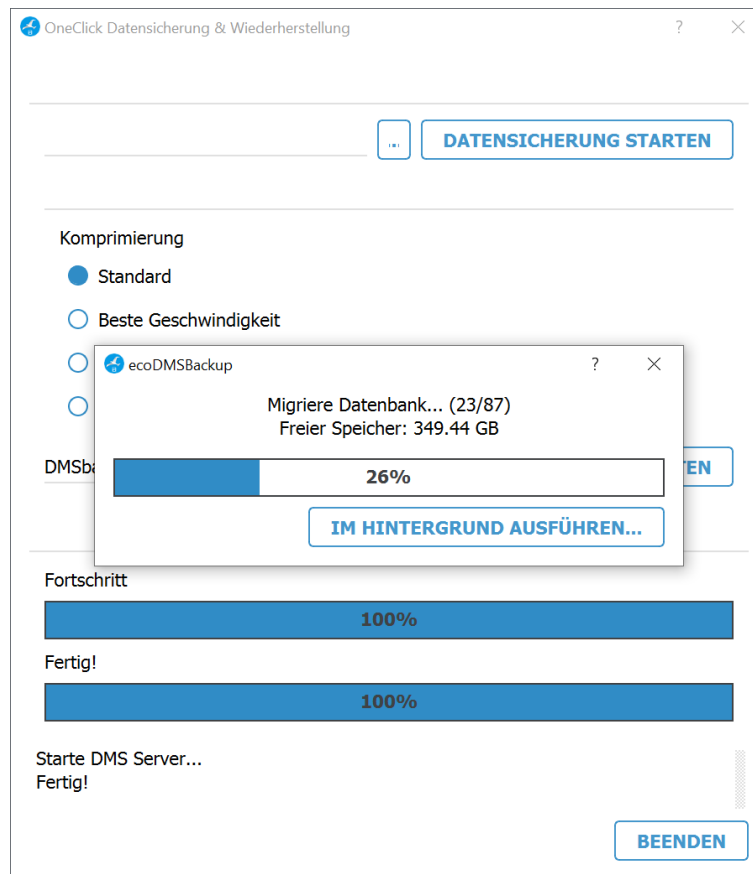
Figure 29.3: oneClick Backup & Restore: Restoring Data

29.2.2 Restore via Console

The following describes how to restore ecoDMS data on a Linux Distribution via Console. The following commands must be run as root.

1. Use the console to open the "tools" folder.

```
/opt/ecodms/ecodmsserver/tools
```

2. Now you need the zip file created via backup. To load the backup, enter the following command:

```
./ecoDMSBackupConsole /PfadzurSicherung.zip restore
```

   a) **Please note that a restore deletes the current database and replaces it with the backup.**
   b) The duration of the recovery depends on the data volume and the system environment. For large data volumes, the recovery can take a long time.

29.3 Restore under Synology (NAS)

The following describes how to restore ecoDMS data on a Synology NAS system [1].

1. Make sure that no other users are working with ecoDMS or are connected to ecoDMS Server.
   a) First, exit all Connection Managers connected to the server.
   b) Check and close all other connections to the server (e.g. web client...).

2. Stop the ecoDMS container if it is still running.

3. Open the "restore" folder in the "File Station" of the ecoDMS data folder.

4. Copy the backup (created with "oneClick Backup" or "ecoDMSBackupConsole") in the "restore" folder.

5. Rename the backup file to "restore.zip".

    a) Please note the notation (use lower case).

6. Start the ecoDMS container.

7. The data recovery process is executed.

    a) This process may take a while.

    b) If the process is successful, the "restore.zip" file is renamed to "restore-processed.zip".

        i. In case of an error, the system converts the file to "restore-failed.zip".
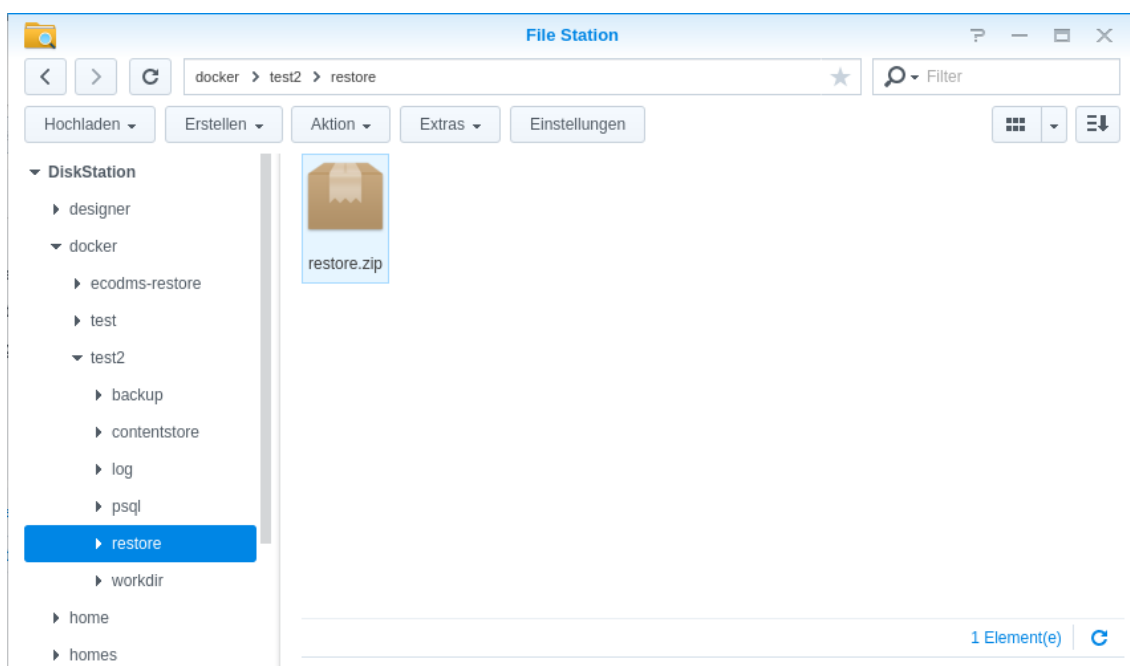
Figure 29.4: Synology - Make Restore

29.4 Restore under QNAP (NAS)

The following describes how to restore ecoDMS data on a QNAP NAS system [1].

1. Make sure that no other users are working with ecoDMS or are connected to ecoDMS Server.

    a) First, exit all Connection Managers connected to the server.

    b) Check and close all other connections to the server (e.g. web client...).

2. Stop the ecoDMS container if it is still running.

3. Open the "restore" folder in the "File Station" of the ecoDMS data folder.

4. Copy the backup (created with "oneClick Backup" or "ecoDMSBackupConsole") in the "restore" folder.

5. Rename the backup file to "restore.zip".

    a) Please note the notation (use lower case).

6. Start the ecoDMS container.

7. The data recovery process is executed.

a) This process may take a while.

b) If the process is successful, "restore.zip" file is renamed to "restore-processed.zip".

   i. In case of an error, the system converts the file to "restore-failed.zip".
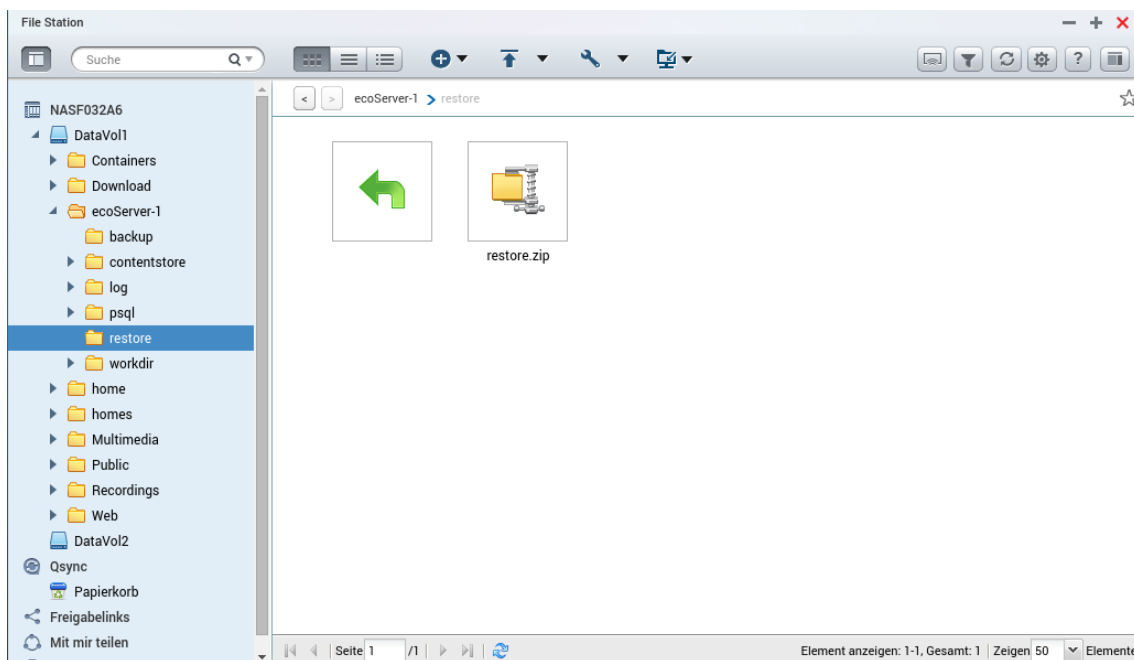
Figure 29.5: QNAP - Make Restore

Important Information for Chapter 29

[1]   *Die Datensicherung sollte auf einem externen Datenträger aufbewahrt werden. Während der Daten-Wiederherstellung ist der ecoDMS Server gestoppt. Daher sollten in dieser Zeit keine Benutzer mit dem System verbunden sein. Mit dem Einspielen einer Datensicherung wird der aktuelle Datenbestand unwiderruflich gelöscht. Dieser Vorgang sollte nur von einem erfahrenen Administrator durchgeführt werden.*

30 PDF/A Printer

> This ecoDMS software is not available for macOS,

The virtual PDF/A Printer from ecoDMS enables easy archiving of documents from printable applications, such as picture and graphic programmes, inventory management systems and many more as a PDF-A document. The PDF/A Printer is a printer driver dedicated to archiving documents in ecoDMS. It forms the interface to external programmes and then allows quick and prompt document archiving. Moreover, a simple click on the print function of the respective programme saves the files directly in the appropriate folder and for the right person [1].

30.1 Settings (Windows)

> The settings for the ecoDMS PDF/A printer are only available under Windows.

You can configure various options for the PDF/A Printer. You can configure several print profiles. The most important thing is not to rename the standard printer. However, you can, of course, give the new print profiles customised names.

1. In the Windows operating system, "Devices and Printers" window.
   a) You can usually find this window in the control panel of your operating system.
   b) Example:

   ```
   Control Panel\Hardware and Sound\Devices and Printers
   ```

2. Select ecoDMS Printer. Now click "Printer Properties" in the current Windows dialog.

3. The "ecoDMS Settings" window opens.

4. Select the "Ports" tab. Click the "Configure Port" button.
   a) You must click this button because the following settings must be performed as administrator.

5. To get to the dialog with ecoDMS Printer options, select the "ECODMS" port.

6. Now click "Configure".

7. Configure the settings for the printer at your work station, which can also be saved as different printers / print profiles. You can save any number of different print profiles with different settings on your PC.
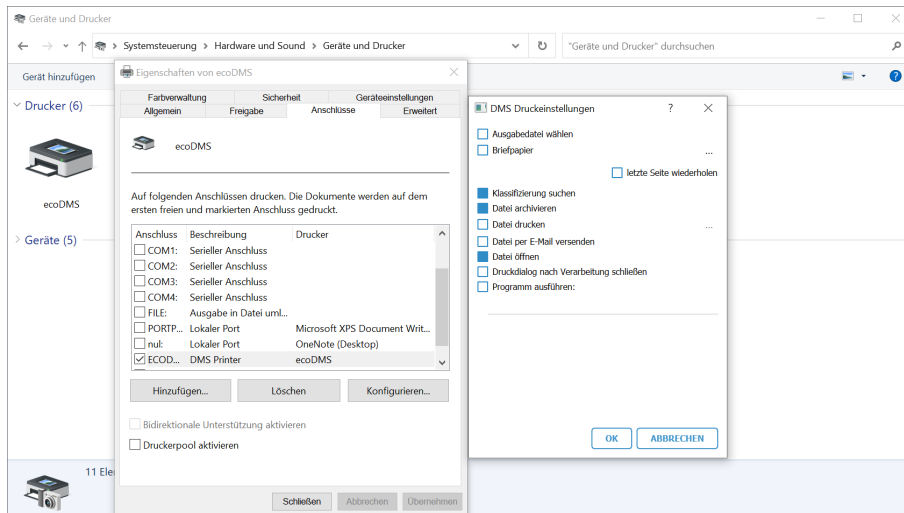
Figure 30.1: PDF/A Printer - Settings

30.1.1 Select Print File

If this function is enabled, the memory location on the file system is requested for this file when printing with this this print profile (after the PDF/A file has been created). For example, you can save a document as PDF/A file on the file system instead of, or in addition to, the archive.

30.1.2 Letter Template

A letter template can be assigned to the PDF/A files when they are created, so that the PDF/A file appears in the same design as the printed document on physical letter paper.

1. Enable the "Letter Template" function

2. Select the letter template you want to deposit as a background for the created documents, from your file system.
   a) When printing via this print profile, the letter template is added to the PDF/A as a background image.

30.1.3 Search for Classification

If this function is enabled, ecoDMS searches for matching classification templates when you archive a document via the PDF/A Printer.

30.1.4 Archive File

If this function is enabled, the document can be classified and archived in ecoDMS when printing with this print profile (after the PDF/A file has been created).

30.1.5 Print File

If this function is enabled, the document can be printed in paper form when printing with this print profile.

1. Enable the "Print file" function.

2. Select the destination printer.

30.1.6 Send File via Email

If this function is enabled, the document can be Emailed while printing with this print profile (after creating the PDF/A file).

1. Enable the "Send file via Email" function.

2. If you select this print profile, the email window automatically opens after the PDF/A file has been created.

3. The document is added as an attachment.

4. Recipient, sender and text, etc., can be assigned freely, as usual.

30.1.7 Open File

If this function is enabled, the finished document is opened after the PDF/A file has been created).

30.1.8 Close Print dialog after Processing

If this function is enabled, the Print dialog is closed after the specified functions have been processed.

30.1.9 Execute Programme

If this function is enabled, a programme starts after the specified functions have been processed. You can enter the application you want to start here.

30.2 Archive PDF/A

To archive documents via the PDF/A Printer, complete the following steps:

1. Select the function "Print" in your active programme.

> e.g. File - Print

2. Now select "ecoDMS" as printer.

3. The Classification dialog opens.

> a) You can fill in the attributes either manually or automatically as a classification template.
>
> b) If ecoDMS recognises templates, the programme fills in the matching attributes and highlights them in green.

4. Archive the file with "OK" or cancel the process with "Cancel".

> You can also execute this step as "dark archiving process" (automatic archiving in background).

5. The file is stored in the PDF/A format and can be accessed via the table in ecoDMS.

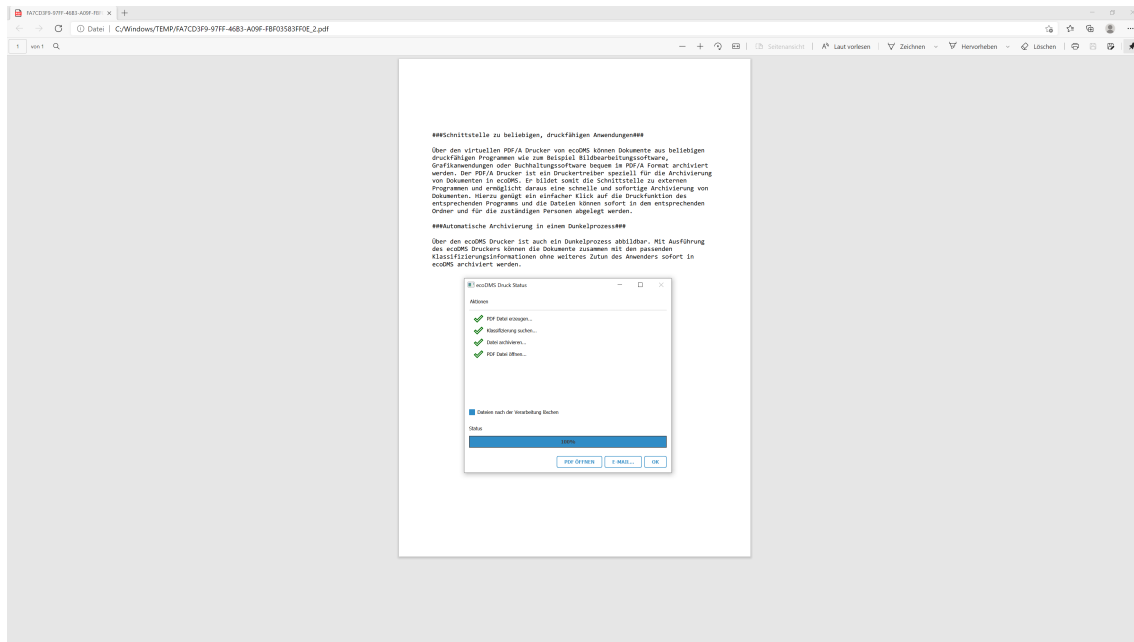> If more print functions are enabled, they are processed consecutively.

Figure 30.2: PDF/A Printer: Example of completed archiving with open file

30.3 Automatic Archiving

The contents of a classification template can be copied to the clipboard and pasted to any position. In this way you can save, for example, dummy text in documents that is recognised and set for classification in ecoDMS when archiving via the ecoDMS PDF/A printer. You can also carry out a dark process (automatic archiving in the background) via the PDF/A Printer. In this process, users can archive the documents together with the matching classification information in ecoDMS, without performing any actions.

- When pasting the template from the clipboard, ensure that the individual lines are not damaged by line breaks.
- To hide the "dummy text" during archiving, we recommend you select a white font, for example, on a white background.
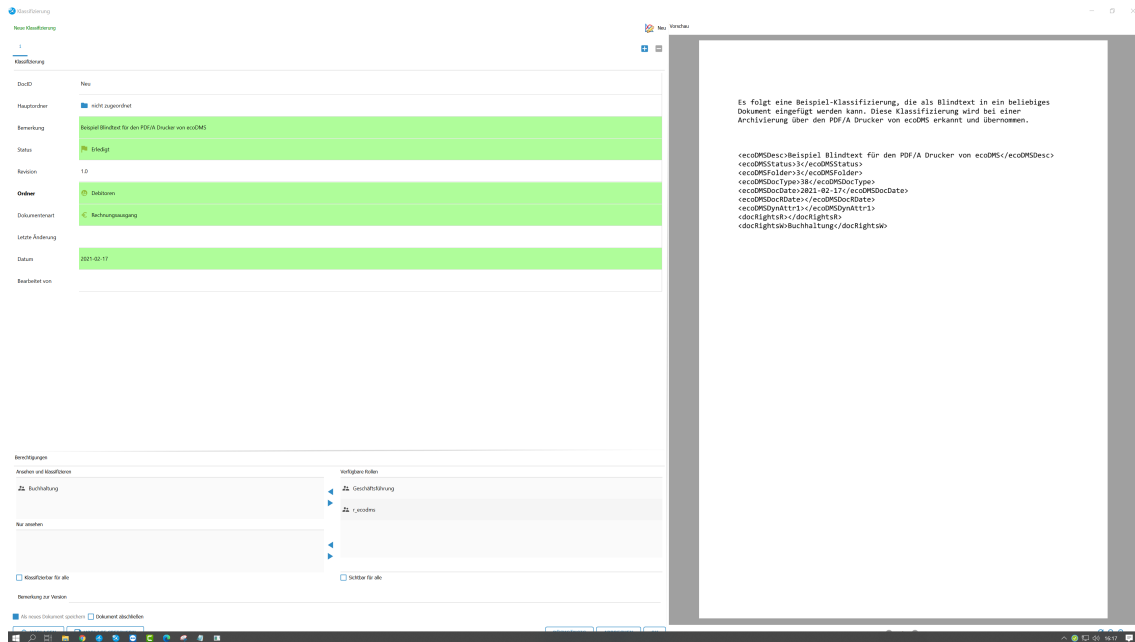
Figure 30.3: PDF/A Printer - Example with Visible "Dummy Text" and the Recognised Classification

30.3.1 Copy Classification to Clipboard

To copy a classification into the clipboard, complete the following steps:

1. Open the "Classification dialog".

2. Enter the attributes and permissions in the Classification dialog according to how they should be assigned during automatic recognition.

3. Right-click the "Permissions" window.

4. Click "Copy Classification to Clipboard".

5. Add any document to the clipboard.

> a) If you add the $<$ecoDMSForceArchive/$>$ command to the entry, the document is classified in a dark process when using the PDF/A Printer. This command only works with ecoDMS PDF/A Printer.
>
> b) In this case, the Classification dialog does not open. The document is classified and deposited in ecoDMS.

Sample Code:

```
<ecoDMSDesc>This is a comment entry.</ecoDMSDesc>
<ecoDMSStatus>1</ecoDMSStatus>
<ecoDMSFolder>4.4</ecoDMSFolder>
<ecoDMSDocType>0</ecoDMSDocType>
<ecoDMSDocDate>2016-03-03</ecoDMSDocDate>
<ecoDMSDocRDate></ecoDMSDocRDate>
<ecoDMSDynAttr1>Payable</ecoDMSDynAttr1>
<ecoDMSDynAttr2>14785666</ecoDMSDynAttr2>
<ecoDMSDynAttr3>Sample Dummy Text</ecoDMSDynAttr3>
<docRightsR></docRightsR>
<docRightsW>ecoSIMSUSER</docRightsW>
```
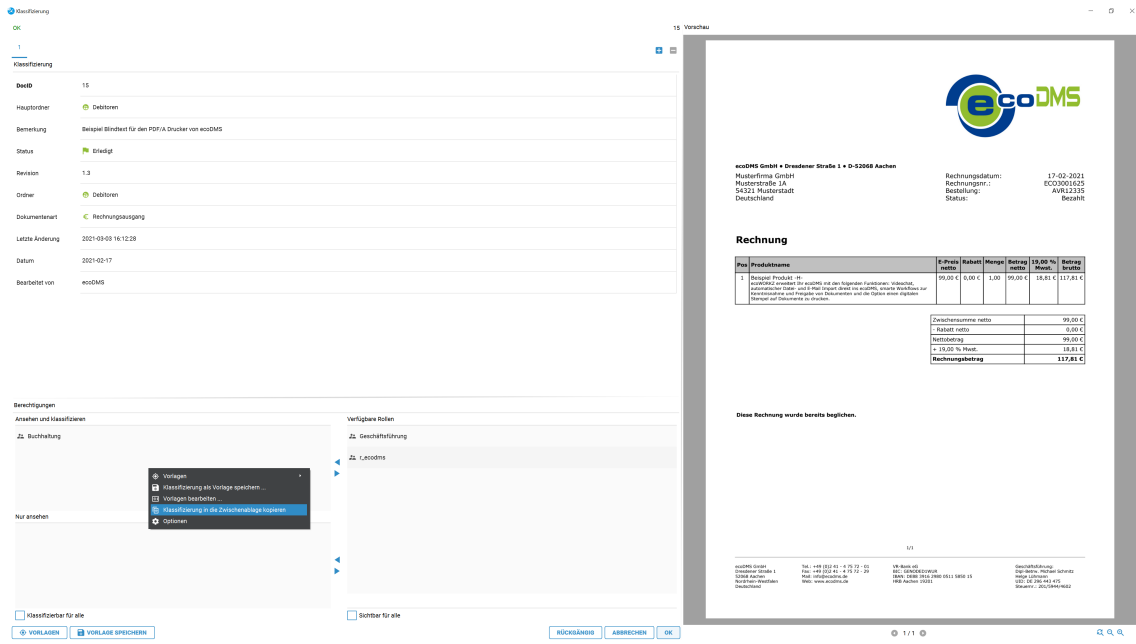
Figure 30.4: PDF/A Printer - Copy Classification to Clipboard

30.3.2 Recognise Attributes via Dummy Text

A folder can automatically be entered for the classification via the ecoDMS folder key, which is for example the customer number. Therefore, the key only has to be entered in the Dummy Text. By archiving via ecoDMS PDF/A Printer the folder is automatically be recognised and assigned in ecoDMS. This requires that the key is stored in the ecoDMS folder structure. The automatic assignment of a folder with the help of Dummy Text is available as follows:

```
<ecoDMSFolder>SEARCH;[KEY]</ecoDMSFolder>
```

Sample Folder with Key: 123456

```
<ecoDMSFolder>SEARCH;123456</ecoDMSFolder>
```

30.3.3 Archive Using Dark Process

> Note that the "Open File" function in ecoDMS PDF/A Printer settings is not enabled in this case (refer to the chapter "PDF/A Printer - Settings (Windows)

When using blind text, classification and archiving can proceed automatically. To do this, ecoDMS requires a specified additional instruction. The additional instruction prompts the system to execute the classification and archiving processes in the background. In this case the Classification dialog is not displayed. The document is directly archived with the retrieved classification information when ecoDMS PDF/A Printer is executed.

1. Open the "Classification dialog".

2. Enter the attributes and permissions in the Classification dialog according to how they should be assigned during automatic recognition.

3. Right-click the "Permissions" window.

4. Click "Copy Classification to Clipboard".

5. Add any document to the clipboard.

6. Add the following command to the entry:

```
<ecoDMSForceArchive/>
```

    a) This command only works with ecoDMS PDF/A Printer.

    b) In this case, the Classification dialog does not open. The document is classified and deposited in ecoDMS.

Sample code included command to run in the dark process:

```
<ecoDMSDesc>This is a comment entry.</ecoDMSDesc>
<ecoDMSStatus>1</ecoDMSStatus>
<ecoDMSFolder>4.4</ecoDMSFolder>
<ecoDMSDocType>0</ecoDMSDocType>
<ecoDMSDocDate>2016-03-03</ecoDMSDocDate>
<ecoDMSDocRDate></ecoDMSDocRDate>
<ecoDMSDynAttr1>Payable</ecoDMSDynAttr1>
<ecoDMSDynAttr2>14785666</ecoDMSDynAttr2>
<ecoDMSDynAttr3>Sample Dummy Text</ecoDMSDynAttr3>
<docRightsR></docRightsR>
<docRightsW>ecoSIMSUSER</docRightsW>
<ecoDMSForceArchive/>
```

30.4 Call Email Client with Dummy Text

Using dummy text, you can transfer documents to the email client and enter the addressee, the subject and the name of the attachment using parameters.
You can extend the dummy text with the following line:

```
<ecoMailSubject>Subject</ecoMailSubject>
<ecoMailTo>mail@addressee1.com</ecoMailTo>
<ecoMailCC>mail@addressee2.com</ecoMailCC>
<ecoMailBCC>mail@addressee3.com</ecoMailBCC>
<ecoMailAttachmentName>Attachment name.pdf</ecoMailAttachmentName>
```

– In ecoDMS Printer settings, both options "Search classification" and "Send file via email" must be enabled.

– When printing with ecoDMS Printer, the default email client opens. A ready-to-send email is displayed containing the values defined in the dummy text.

31 Libre- + OpenOffice Add-on (1.0.6)

- This function requires a license for the full version of ecoDMS but can also be tested in the trial version. This function is not enabled in the Free4Three version.
- To use it, you need a Java installation which is enabled in the Office application (Options -> Advanced -> Java Options [enable]).
- The prerequisite for using this plugin is the installation of the current software components of: ecoDMS Server, ecoDMS Client and ecoDMS PDF/A Printer.

ecoDMS has its own add-on for LibreOffice and OpenOffice. Use the plugin to directly archive documents from the "Writer, Calc and Impress" applications in ecoDMS. When archiving, ecoDMS saves the documents in PDF/A and in the original Office format. You can edit and save the original file as a new version if required.

31.1 Archive Document

To archive documents from LibreOffice or OpenOffice in ecoDMS, proceed as follows:

1. Create an Office file

2. Select one of the following function calls for archiving

   a) Office toolbar -> ecoDMS Icon (Save to Archive)

   b) Office Menu -> ecoDMS -> Save to Archive

3. Archiving is prepared

   a) If you are connected to the Connection Manager using several profiles, ecoDMS prompts you to select the target profile for archiving

4. The classification dialog opens

- You can either fill in the attributes manually, or automatically via a classification template
- If ecoDMS recognises a template, the programme fills in the matching attributes and highlights them in Color
- Before archiving, please note the following settings:
  - If you tick the "Finalise document" checkbox, you cannot make changes to the document after archiving. If you want to make changes, the document needs to be archived in ecoDMS as a new file.
  - If the "Finalise document" checkbox is NOT ticked, the document can subsequently be opened through version control, edited, and filed as a new version.

5. Archive the files with "OK" or abort the process with "Cancel".

- The file is saved in ecoDMS in the PDF/A format and displays in the preview
- In addition, the original file is archived as a version for the PDF/A in ecoDMS

Figure 31.1: LibreOffice (Here: Calc) - Save Document to Archive (Options)
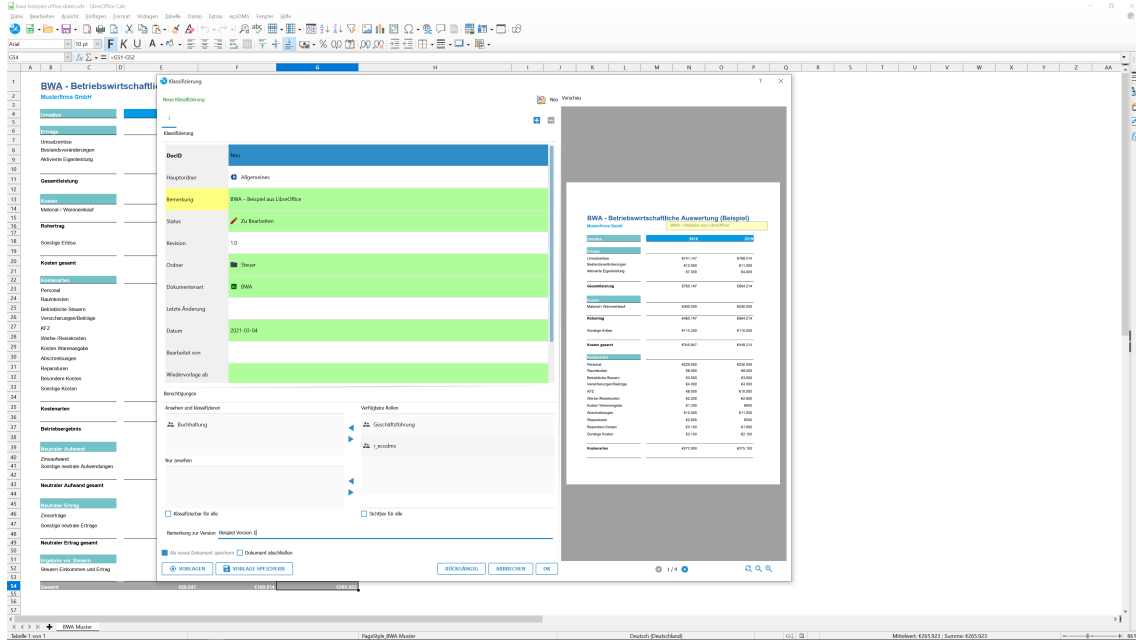
Figure 31.2: LibreOffice (Here: Calc) - Save Document to Archive (Options)
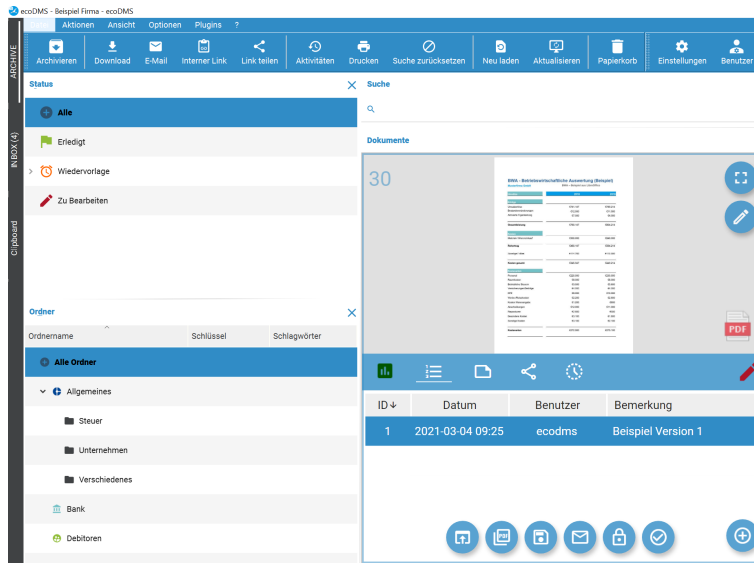
Figure 31.3: LibreOffice - Filing in ecoDMS as PDF/A (Preview) and 1st Version (Original File)

31.2 Edit Document

> You can only save a new version if the document is
> - not yet finalised in ecoDMS
> - not checked out by another user

If an Office document is not yet finalised in ecoDMS, you can open the original file from ecoDMS, edit it with Office and then archived the file as a new version with the ecoDMS plugin.

1. Open an original file from the "Versions" tab in ecoDMS

2. Make your changes in Office

3. Select one of the following function calls for archiving

   a) Office toolbar -> ecoDMS Icon (Save to Archive)

   b) Office Menu -> ecoDMS -> Save to Archive

   c) Use the standard Office save function

   > – Office menu -> File -> Save (Ctrl + S)
   >   – The system automatically detects that the file was opened from ecoDMS and opens the appropriate classification
   > – Office menu -> File -> Save As (Ctrl + Shift + S)
   >   – saves the file as usual in the local file system and not in ecoDMS

4. Archiving is prepared

   a) If you are connected to the Connection Manager using several profiles, ecoDMS prompts you to select the target profile for archiving

5. The existing classification is loaded

   > – Before archiving, please note the following settings:
   >   – If you tick the "Finalise document" checkbox, you cannot make changes to the document after archiving. If you want to make changes, the document needs to be archived in ecoDMS as a new file.
   >   – If the "Finalise document" checkbox is NOT ticked, the document can subsequently be opened through version control, edited, and filed as a new version.

6. Archive the emails with "OK" or abort the process with "Cancel".

   > – The file is saved in ecoDMS in the PDF/A format and displays in the preview
   > – In addition, the original file is archived as a new version for the PDF/A in ecoDMS

31.3 Re-Archive Document

You can open the original file of an archived Office file from ecoDMS and store it again as a new document.

1. Open an original file from the "Versions" tab in ecoDMS

2. Make your changes in Office

3. Select one of the following function calls for archiving

   a) Office toolbar -> ecoDMS Icon (Save to Archive)

   b) Office Menu -> ecoDMS -> Save to Archive

4. Archiving is prepared

   a) If you are connected to the Connection Manager using several profiles, ecoDMS prompts you to select the target profile for archiving

5. The existing classification is loaded

   – You can adapt the classification for the new document accordingly

6. Enable the "Save as new document" function in the classification dialog

   – The file is then archived in ecoDMS not as a new version but as a new document
   – In this case ecoDMS applies any changes in the classification to the new document. The classification of the "original version" remains unchanged
   – If you tick the "Finalise document" checkbox, you cannot make changes to the document after archiving
   – If the "Finalise document" checkbox is NOT ticked, the document can subsequently be opened through version control, edited, and filed as a new version

7. Archive the emails with "OK" or abort the process with "Cancel"

   – The file is saved in ecoDMS in the PDF/A format and displays in the preview
   – In addition, the original file is archived as a new version for the PDF/A in ecoDMS

32 Microsoft Office Add-in (2.1.2)

> – This function requires a license for the full version of ecoDMS but can also be tested in the trial version. This function is not enabled in the Free4Three version.
> – The prerequisite for using this plugin is the installation of the current software components of: ecoDMS Server, ecoDMS Client and ecoDMS PDF/A Printer.

ecoDMS has its own add-in for Microsoft Office. This allows you to archive documents directly from "Word, Excel, PowerPoint and Outlook in ecoDMS. When archiving, ecoDMS saves the documents in PDF/A and in the original Office format. The original file can be edited and saved as a new version if required.

32.1 Archive Document

To archive documents from MS Office in ecoDMS, proceed as follows:

1. Create an Office file

2. Select one of the following function calls for archiving

   a) Office toolbar -> ecoDMS icon (Archive) (in the Office "Start" tab)

   b) Office menu -> ecoDMS -> Archive (display depends on the MS Office version)

3. Archiving is prepared

   a) If you are connected to the Connection Manager using several profiles, ecoDMS prompts you to select the target profile for archiving

4. The classification dialog opens

> – You can either fill in the attributes manually, or automatically via a classification template
> – If ecoDMS recognises a template, the programme fills in the matching attributes and highlights them in Color
> – Before archiving, please note the following settings:
>   – If you tick the "Finalise document" checkbox, you cannot make changes to the document after archiving. If you want to make changes, the document needs to be archived in ecoDMS as a new file.
>   – If the "Finalise document" checkbox is NOT ticked, the document can subsequently be opened through version control, edited, and filed as a new version.

5. Archive the emails with "OK" or abort the process with "Cancel".

> – The file is saved in ecoDMS in the PDF/A format and displays in the preview
> – In addition, the original file is archived as a version for the PDF/A in ecoDMS

Figure 32.1: MS Office (Here: Excel) - Archive Document

Figure 32.2: MS Office - Classification as First Version (Here: With Recognised Classification Template)
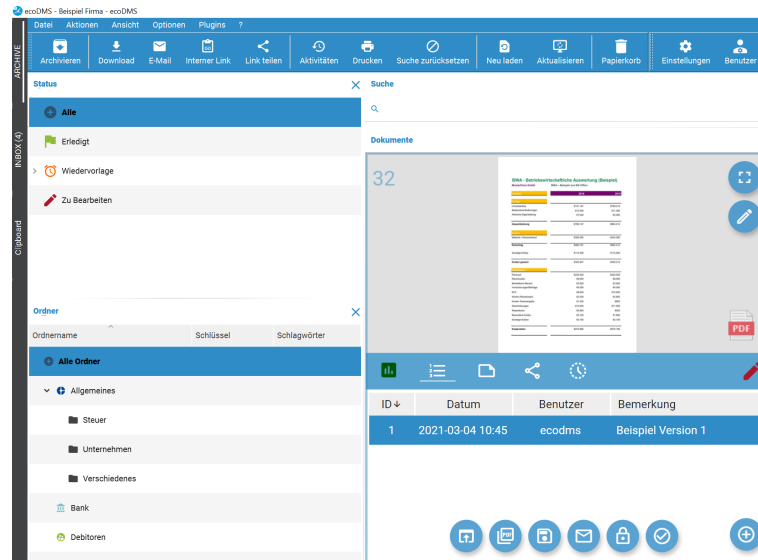
Figure 32.3: MS Office - Filing in ecoDMS as PDF/A (Preview) and 1st Version (Original File)

32.2 Edit Document

You can only save a new version if the document is
- not yet finalised in ecoDMS
- not checked out by another user

If an Office document is not yet finalised in ecoDMS, you can open the original file from ecoDMS, edit it with Office and then archived the file as a new version with the ecoDMS plugin.

1. Open an original file from the "Versions" tab in ecoDMS

2. Make your changes in Office

3. Select one of the following function calls for archiving

   a) Office toolbar -> ecoDMS Icon (Archive)

   b) Office menu -> ecoDMS -> Archive (display depends on the MS Office version)

   c) Use the standard Office save function

   - Office menu -> File -> Save
     - The system automatically detects that the file was opened from ecoDMS and opens the appropriate classification
   - Office menu -> File -> Save As
     - saves the file as usual in the local file system and not in ecoDMS

4. Archiving is prepared

   a) If you are connected to the Connection Manager using several profiles, ecoDMS prompts you to select the target profile for archiving

5. The existing classification is loaded

- Before archiving, please note the following settings:
  - If you tick the "Finalise document" checkbox, you cannot make changes to the document after archiving. If you want to make changes, the document needs to be archived in ecoDMS as a new file.
  - If the "Finalise document" checkbox is NOT ticked, the document can subsequently be opened through version control, edited, and filed as a new version.

6. Archive the emails with "OK" or abort the process with "Cancel".

- The file is saved in ecoDMS in the PDF/A format and displays in the preview
- In addition, the original file is archived as a new version for the PDF/A in ecoDMS

32.3 Re-Archive Document

You can open the original file of an archived Office file from ecoDMS and store it again as a new document.

1. Open an original file from the "Versions" tab in ecoDMS

2. Make your changes in Office

3. Select one of the following function calls for archiving
   a) Office toolbar -> ecoDMS Icon (Archive)
   b) Office menu -> ecoDMS -> Archive (display depends on the MS Office version)

4. Archiving is prepared
   a) If you are connected to the Connection Manager using several profiles, ecoDMS prompts you to select the target profile for archiving

5. The existing classification is loaded

- You can adapt the classification for the new document accordingly

6. Enable the "Save as new document" function in the classification dialog

- The file is then archived in ecoDMS not as a new version but as a new document
- In this case ecoDMS applies any changes in the classification to the new document. The classification of the "original version" remains unchanged
- If you tick the "Finalise document" checkbox, you cannot make changes to the document after archiving
- If the "Finalise document" checkbox is NOT ticked, the document can subsequently be opened through version control, edited, and filed as a new version

7. Archive the emails with "OK" or abort the process with "Cancel".

– The file is saved in ecoDMS in the PDF/A format and displays in the preview
– In addition, the original file is archived as a new version for the PDF/A in ecoDMS

32.4 Archive Emails from Outlook

In addition to Office documents, you can also archive incoming and outgoing emails from Outlook via the MS Office plugin of ecoDMS.

1. ecoDMS archives the complete email, including any attachments, in the standard mail format EML.
    a) This file is archived as a version
2. The message content (without attachments) is filed as PDF/A
    – The PDF/A is displayed in the preview
3. If the email contains attachments, they are stored individually in ecoDMS as an attachment to the DocID in the table view
    a) Attachments are identified with a Colored arrow next to the DocID in the table
4. During the archiving process, ecoDMS executes automatic full-text recognition
    a) This allows the retrieval of email text and readable attachments via the full-text search
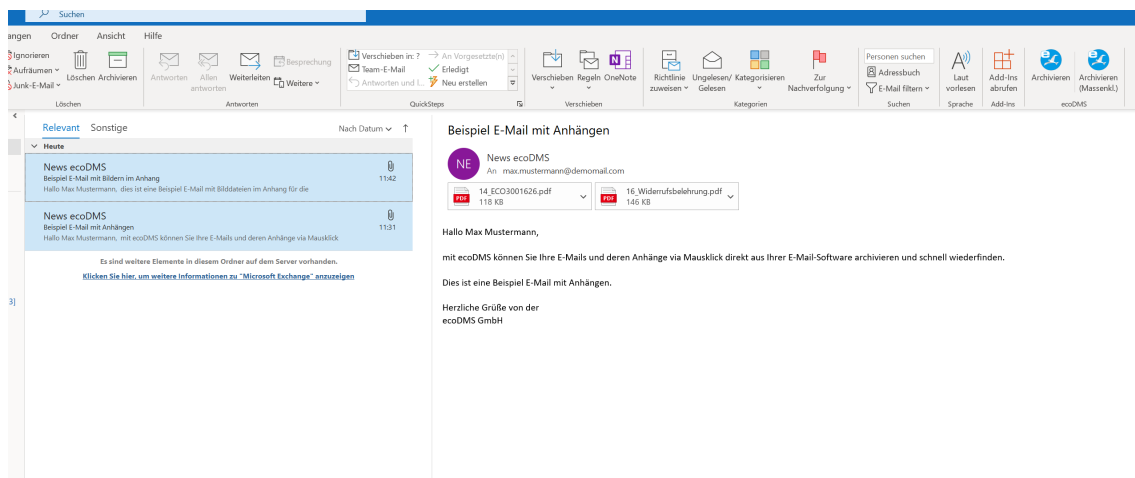
Figure 32.4: MS Office Plugin - Outlook

32.4.1 Send and Archive

You can send outgoing emails and archive them at the same time.

1. Write a message as usual and add attachments as an option

2. Click the "Send and Archive" icon in the Outlook "Message" tab

3. The email is sent and prepared for archiving
    a) If you are connected to the Connection Manager using several profiles, ecoDMS prompts you to select the target profile for archiving

4. The classification dialog opens

- You can either fill in the attributes manually, or automatically via a classification template
- If ecoDMS recognises a template, the programme fills in the matching attributes and highlights them in Color
- Before archiving, please note the following settings:
  - If you tick the "Finalise document" checkbox, no further versions can be added to the email
  - If you do NOT tick the "Finalise document" checkbox, you can add further versions the email in ecoDMS

5. Archive the email with "OK" or abort the process with "Cancel"

- The message content is saved in ecoDMS in the PDF/A format and displays in the preview
- In addition, an EML file of the email is archived as an initial version for the PDF/A in ecoDMS
- If the email contains attachments, they are stored individually in ecoDMS as an attachment to the DocID in the table view

Figure 32.5: MS Office Plugin - Outlook - Send and Archive Email (Here: With Attachment)

Figure 32.6: MS Office Plugin - Outlook - Archived Email with Attachments in ecoDMS (Here: Table View)

32.4.2 Archive Single Email

To archive an entire email (incl. attachments), complete the following steps:

1. Select or open the email in Outlook

2. Click the ecoDMS "Archive" icon

3. Archiving is prepared

   a) If you are connected to the Connection Manager using several profiles, ecoDMS prompts you to select the target profile for archiving

4. The classification dialog opens

   – You can either fill in the attributes manually, or automatically via a classification template
   – If ecoDMS recognises a template, the programme fills in the matching attributes and highlights them in Color
   – Before archiving, please note the following settings:
       – If you tick the "Finalise document" checkbox, no further versions can be added to the email
       – If you do NOT tick the "Finalise document" checkbox, you can add further versions the email in ecoDMS

5. Archive the email with "OK" or abort the process with "Cancel"

   – The message content is saved in ecoDMS in the PDF/A format and displays in the preview
   – In addition, an EML file of the email is archived as an initial version for the PDF/A in ecoDMS
   – If the email contains attachments, they are stored individually in ecoDMS as an attachment to the DocID in the table view

Figure 32.7: MS Office Plugin - Outlook - Archive Email

32.4.3 Archive Several Emails Consecutively

You can archive several emails consecutively. The emails are classified individually, one after the other. To archive several emails consecutively, complete the following steps

1. Highlight the emails in Outlook (hold down the CTRL key for multiple selection)

2. Click the ecoDMS "Archive" icon

3. Archiving is prepared

    a) If you are connected to the Connection Manager using several profiles, ecoDMS prompts you to select the target profile for archiving

4. The classification dialog is opened for each email, i.e. one after the other

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- You can either fill in the attributes manually, or automatically via a classification template
- If ecoDMS recognises a template, the programme fills in the matching attributes and highlights them in Color
- Before archiving, please note the following settings:
    - If you tick the "Finalise document" checkbox, no further versions can be added to the email
    - If you do NOT tick the "Finalise document" checkbox, you can add further versions the email in ecoDMS

---

5. Archive the emails with "OK" or abort the process with "Cancel"

- The message content is saved in ecoDMS in the PDF/A format and displays in the preview
- In addition, an EML file of the email is archived as an initial version for the PDF/A in ecoDMS
- If the email contains attachments, they are stored individually in ecoDMS as an attachment to the DocID in the table view
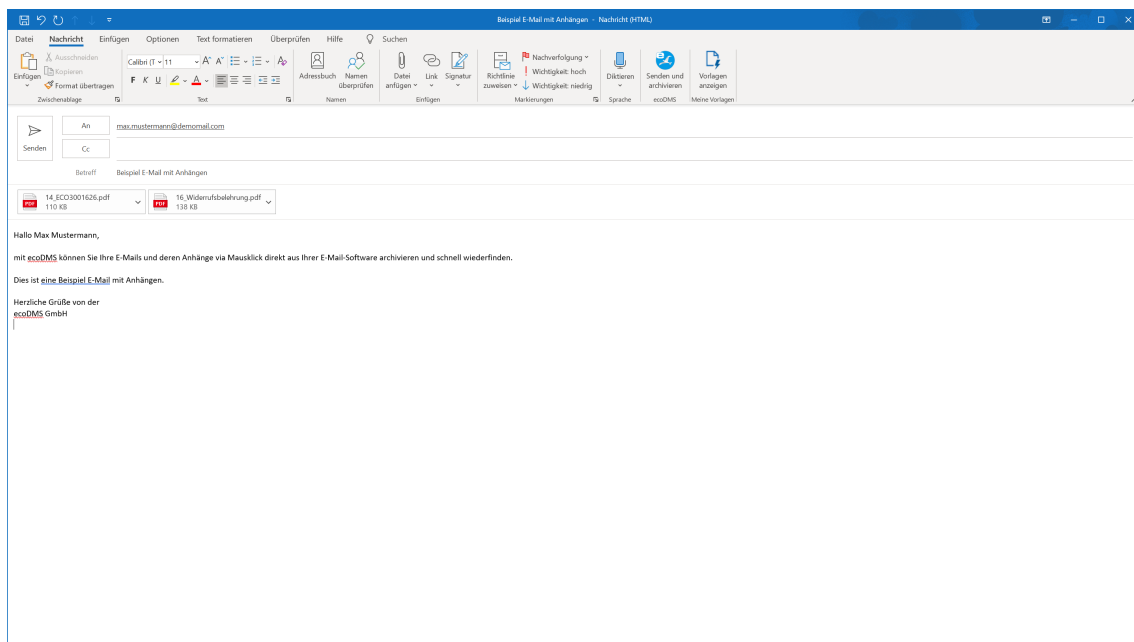

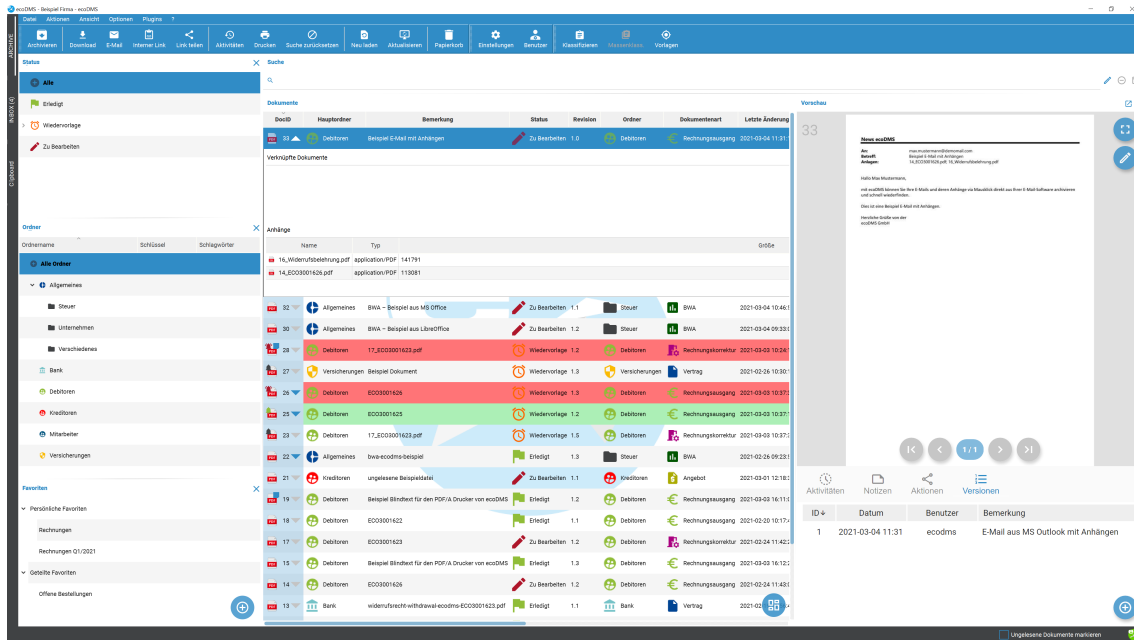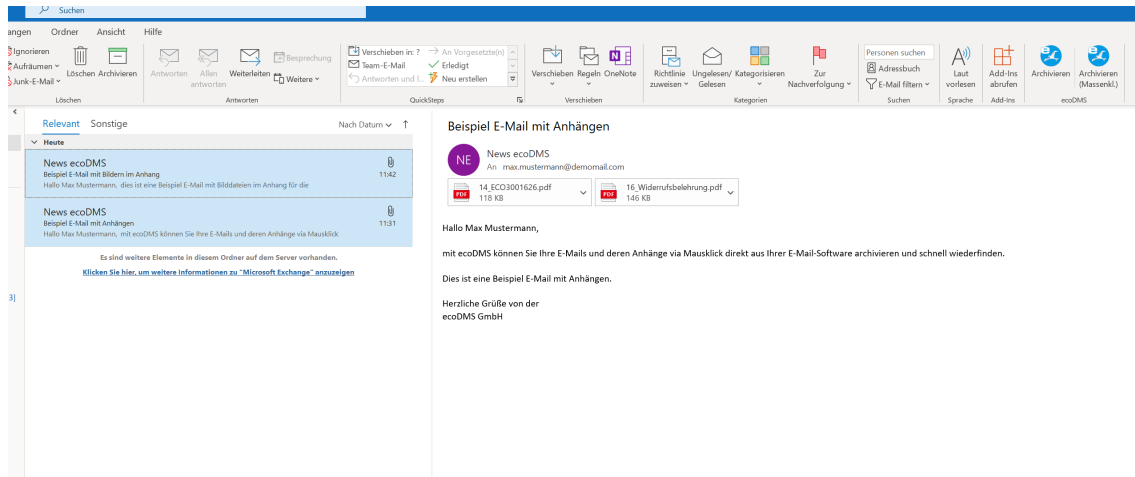
Figure 32.8: MS Office Plugin - Outlook - Archive Email

32.4.4 Archive Several Emails Simultaneously (Mass Classification)

You can archive several emails simultaneously. In this case, ecoDMS performs mass classification for all selected messages and all files receive the same classification. The emails are saved in ecoDMS complete with attachments. To archive several emails with mass classification, complete the following steps:

1. Highlight the emails in Outlook (hold down the CTRL key for multiple selection)

2. Click the ecoDMS "Archive (Mass Classification)" icon

3. Archiving is prepared

    a) If you are connected to the Connection Manager using several profiles, ecoDMS prompts you to select the target profile for archiving

4. Classification is now performed as mass classification

    a) A mass classification classifies several emails simultaneously with the same information.
    b) For mass classification, only fill in the fields that you want to classify for all documents. All other classification attributes are not overwritten.

5. Archive the emails with "OK" or abort the process with "Cancel"

    – Each email is saved individually in ecoDMS
    – The message content is saved in ecoDMS in the PDF/A format and displays in the preview
    – In addition, an EML file of the email is archived as an initial version for the PDF/A in ecoDMS
    – If the email contains attachments, they are stored individually in ecoDMS as an attachment to the DocID in the table view
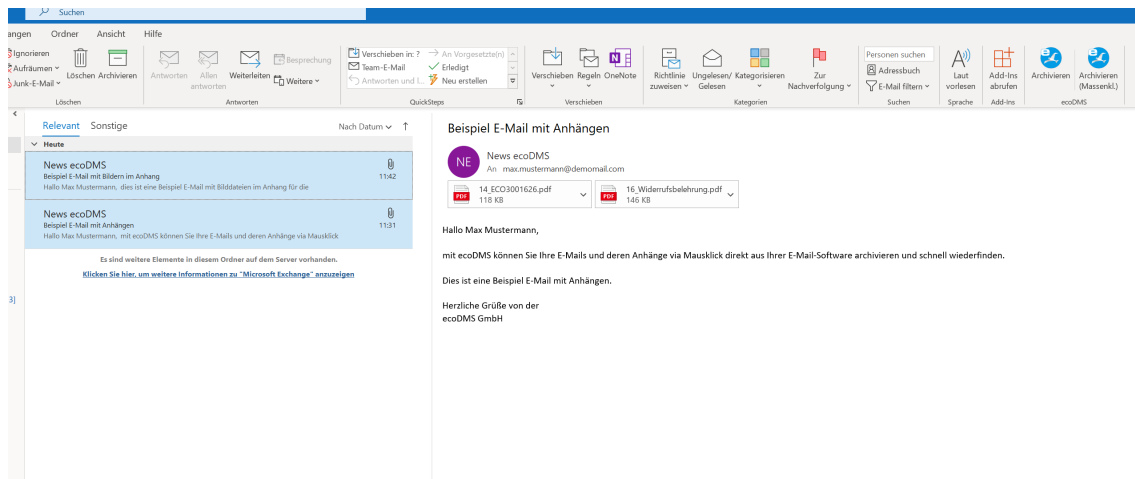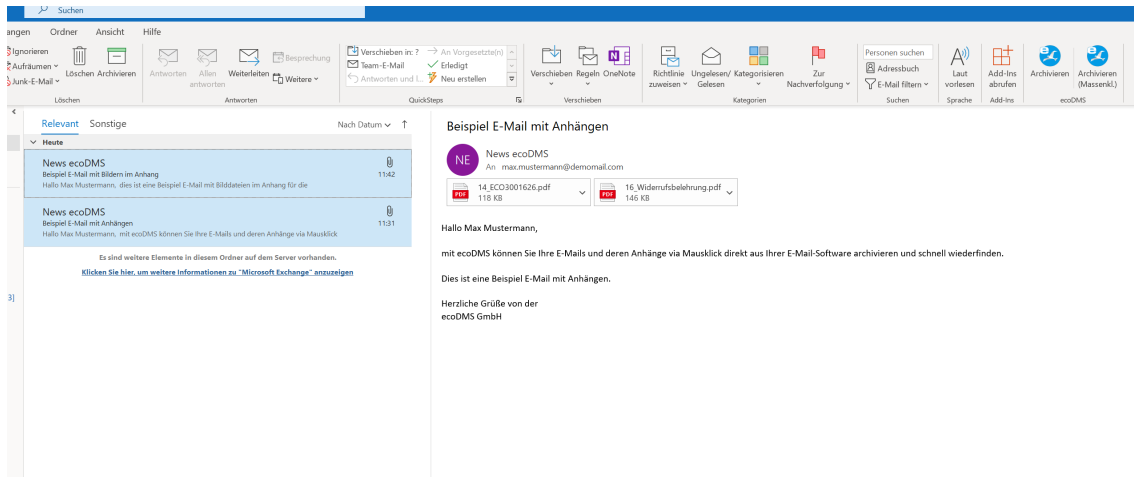
Figure 32.9: MS Office Plugin - Outlook - Archive Email

32.4.5 Archive Attachments

You can archive email attachments in ecoDMS independently, without the message. Classification can be performed individually for each attachment or uniformly as mass classification for all attachments. If the attachments are readable files, ecoDMS automatically creates a full-text index.

1. Open the email in Outlook

2. Click the ecoDMS "Archive Attachment" icon

3. If there are several attachments, you can now select which files you want to archive

> – In this selection dialog, enable the "Mass Classification" function for uniform classification of all selected files
> – For mass classification, only fill in the fields that you want to classify for all documents. All other classification attributes are not overwritten
> – Otherwise, all selected attachments are classified consecutively

4. Archiving is prepared
   a) If you are connected to the Connection Manager using several profiles, ecoDMS prompts you to select the target profile for archiving

5. The classification dialog opens according to your selection
   a) Either for each document individually, i.e. consecutively
   b) Or in form of a dialog for mass classification of all files

6. Archive the attachments with "OK" or abort the process with "Cancel"

> – Each file is saved individually in ecoDMS
> – The attachment is archived in its original format
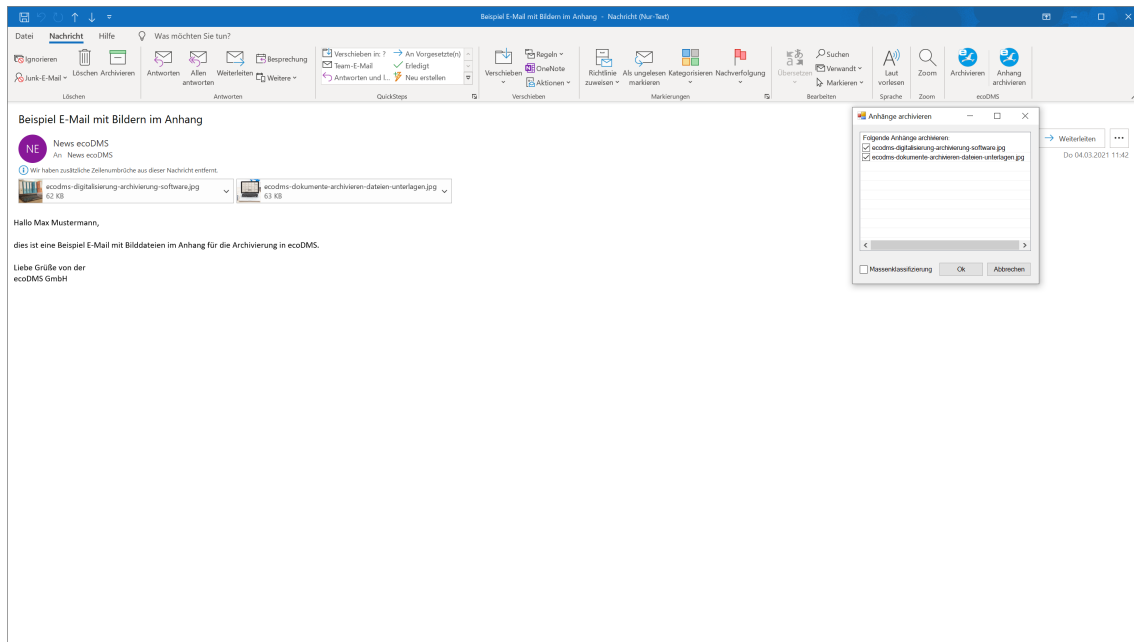
Figure 32.10: MS Office Plugin - Outlook - Archive Email Attachments

33 Thunderbird Add-on (3.0.4 + 3.0.8)

Use the ecoDMS Thunderbird add-on to archive incoming and outgoing emails from Thunderbird.

1. ecoDMS archives the complete email, including any attachments, in the standard mail format EML.
   a) This file is archived as a version
2. The message content (without attachments) is filed as PDF/A
   – The PDF/A is displayed in the preview
3. If the email contains attachments, they are stored individually in ecoDMS as an attachment to the DocID in the table view
   a) Attachments are identified with an arrow next to the DocID
4. During the archiving process, ecoDMS executes automatic full-text recognition
   a) This allows the retrieval of email text and readable attachments via the full-text search
5. The ecoDMS Thunderbird add-on does not generate PDF/A files for macOS. Only the original email is deposited as an EML file. This is not an error in ecoDMS: https://bugzilla.mozilla.org/show_bug.cgi?id=675709
6. The prerequisite for using this add-on is the installation of the current software components of: ecoDMS Server, ecoDMS Client and ecoDMS PDF/A Printer
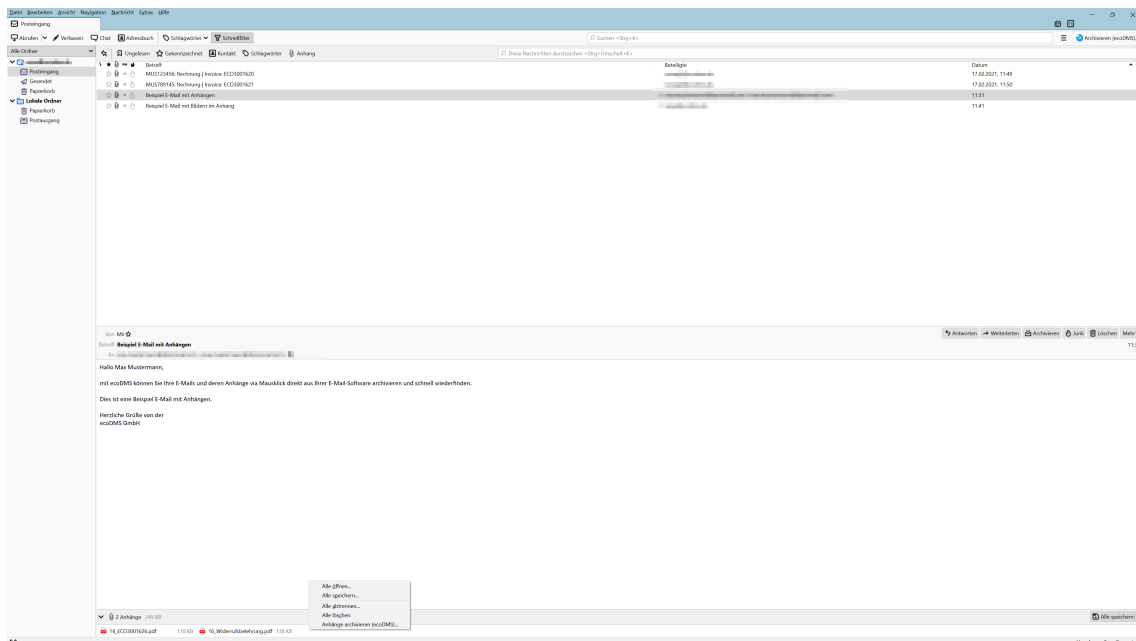
Figure 33.1: Thunderbird Plugin

33.1 Send and Archive

You can send outgoing emails and archive them at the same time.

1. Write a message as usual and add attachments as an option

2. Click the "Send and Archive" icon in Thunderbird

3. The email is sent and prepared for archiving

a) If you are connected to the Connection Manager using several profiles, ecoDMS prompts you to select the target profile for archiving

4. The classification dialog opens

- You can either fill in the attributes manually, or automatically via a classification template
- If ecoDMS recognises a template, the programme fills in the matching attributes and highlights them in Color
- Before archiving, please note the following settings:
  - If you tick the "Finalise document" checkbox, no further versions can be added to the email
  - If you do NOT tick the "Finalise document" checkbox, you can add further versions the email in ecoDMS

5. Archive the email with "OK" or abort the process with "Cancel"

- The message content is saved in ecoDMS in the PDF/A format and displays in the preview
- In addition, an EML file of the email is archived as an initial version for the PDF/A in ecoDMS
- If the email contains attachments, they are stored individually in ecoDMS as an attachment to the DocID in the table view

Figure 33.2: Thunderbird Plugin - Send and Archive Email

33.2 Archive Single Email

To archive an entire email (incl. attachments), complete the following steps:

1. Select or open the email in Thunderbird

2. Click the ecoDMS icon "Archive (ecoDMS)"

3. Archiving is prepared

   a) If you are connected to the Connection Manager using several profiles, ecoDMS prompts you to select the target profile for archiving

4. The classification dialog opens

> – You can either fill in the attributes manually, or automatically via a classification template
> – If ecoDMS recognises a template, the programme fills in the matching attributes and highlights them in Color
> – Before archiving, please note the following settings:
>   – If you tick the "Finalise document" checkbox, no further versions can be added to the email
>   – If you do NOT tick the "Finalise document" checkbox, you can add further versions the email in ecoDMS

5. Archive the email with "OK" or abort the process with "Cancel"

> – The message content is saved in ecoDMS in the PDF/A format and displays in the preview
> – In addition, an EML file of the email is archived as an initial version for the PDF/A in ecoDMS
> – If the email contains attachments, they are stored individually in ecoDMS as an attachment to the DocID in the table view
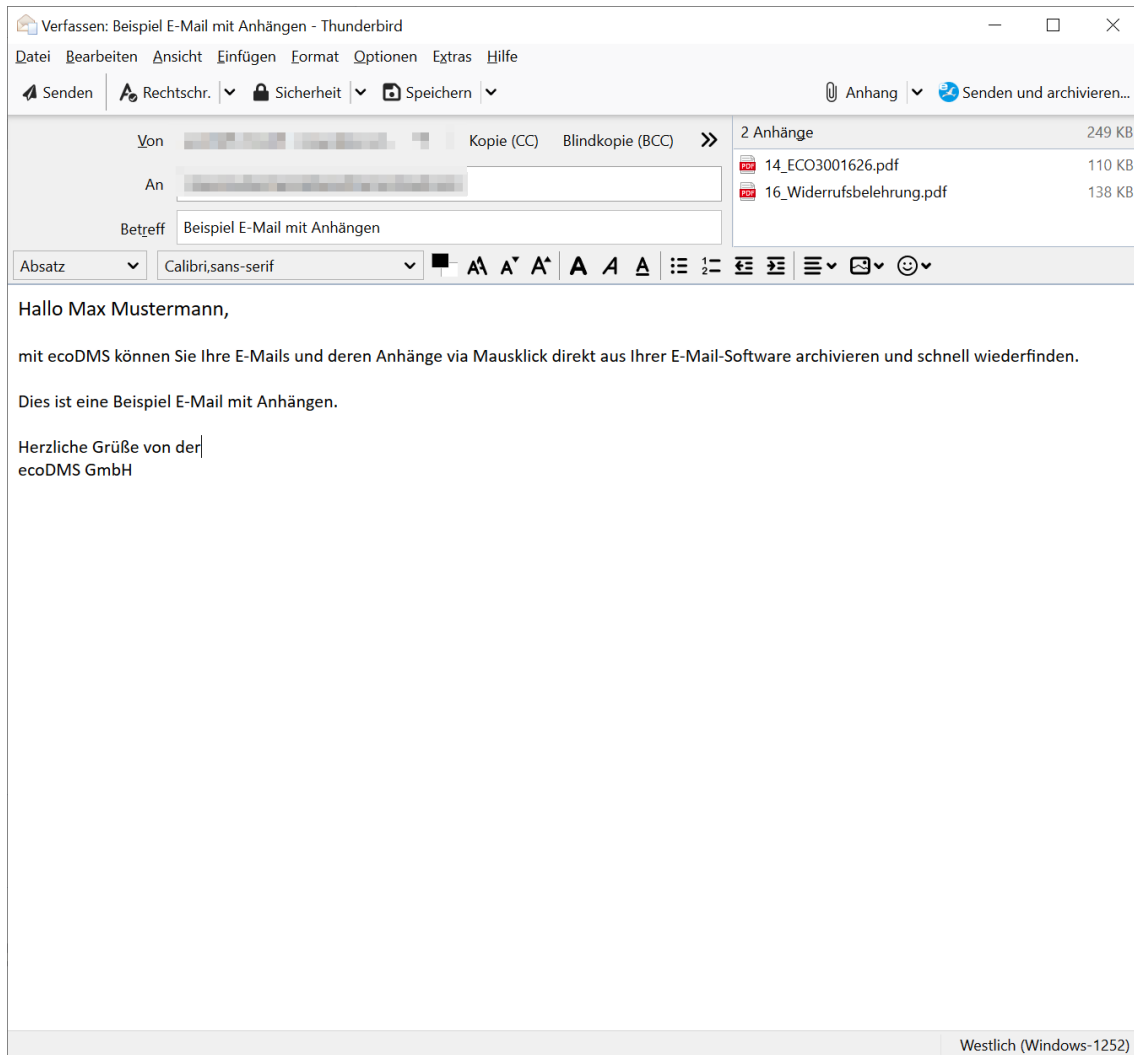
33.3 Archive Several Emails Consecutively

You can archive several emails consecutively. The emails are classified individually, one after the other. To archive several emails consecutively, complete the following steps:

1. Highlight the emails in Thunderbird (hold down the CTRL key for multiple selection)

2. Click the ecoDMS icon "Archive (ecoDMS)"

3. Archiving is prepared
   a) If you are connected to the Connection Manager using several profiles, ecoDMS prompts you to select the target profile for archiving

4. The classification dialog is opened for each email, i.e. one after the other

> – You can either fill in the attributes manually, or automatically via a classification template
> – If ecoDMS recognises a template, the programme fills in the matching attributes and highlights them in Color
> – Before archiving, please note the following settings:
>   – If you tick the "Finalise document" checkbox, no further versions can be added to the email
>   – If you do NOT tick the "Finalise document" checkbox, you can add further versions the email in ecoDMS

5. Archive the emails with "OK" or abort the process with "Cancel".

> – The message content is saved in ecoDMS in the PDF/A format and displays in the preview
> – In addition, an EML file of the email is archived as an initial version for the PDF/A in ecoDMS
> – If the email contains attachments, they are stored individually in ecoDMS as an attachment to the DocID in the table view

33.4 Archive Attachments

You can archive email attachments in ecoDMS independently, without the message. If there are several attachments, you can archive them all at once in ecoDMS. Each attachment is classified individually. If the attachments are readable files, ecoDMS automatically creates a full-text index.

1. Open the email in Thunderbird

2. Expand the "Attachments" window

3. If there are several attachments, you can now select which files you want to archive

- Right-click the heading "x Attachments" -> Archive Attachments (ecoDMS) to classify and archive all attachments subsequently
- Right-click a single attachment -> Archive Attachment (ecoDMS) to classify and archive only this attachment

4. Archiving is prepared

   a) If you are connected to the Connection Manager using several profiles, ecoDMS prompts you to select the target profile for archiving

5. The classification dialog opens subsequently for each attachment

6. Archive the attachments with "OK" or abort the process with "Cancel"

- Each file is saved individually in ecoDMS
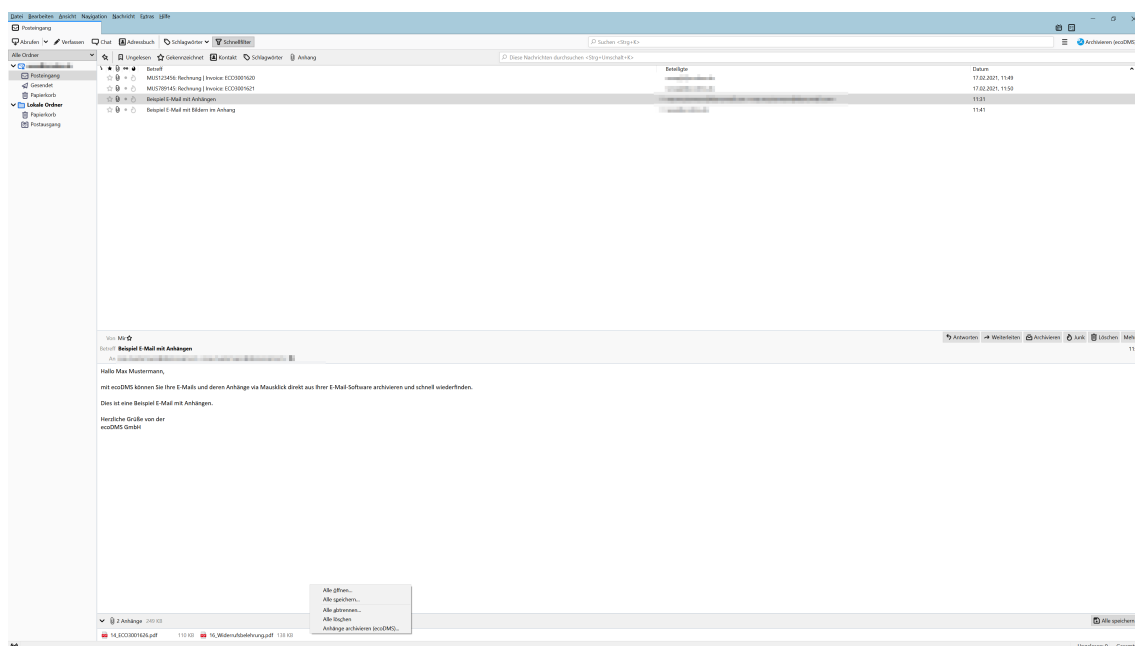- The attachment is archived in its original format

Figure 33.3: Thunderbird Plugin - Archive Attachments

34 ecoMAILZ Plugin (1.0.4)

- ecoMAILZ is a stand-alone software that is not included in the standard ecoDMS package. You need to purchase a license for this software. If you have a valid ecoMAILZ license, you can install the ecoMAILZ plugin for the ecoDMS full version for free.
- The ecoDMS installation manual describes how to set up the connection. ▪ General settings, such as the configuration of adapters, users, etc., can only be made by an administrator via ecoMAILZ Webclient.
- All ecoMAILZ email features with the exception of the Read Aloud feature are also available in the plugin.
- The user and read permissions of the ecoMAILZ settings in the Webclient apply.
- This chapter focuses on the ecoMAILZ features specific to ecoDMS.
- For all other ecoMAILZ features, refer to the ecoMAILZ manual.

ecoMAILZ integration in ecoDMS: ecoMAILZ is a stand-alone software for automatic and legally compliant archiving of emails and their attachments. Integrating ecoMAILZ into the ecoDMS document management system enables you to manage all your documents and emails from one user interface. You do not need to switch between systems to access your data. The plugin integrates the ecoMAILZ interface with the ecoDMS interface in a separate tab. This allows you to manage all your emails and their attachments from the ecoDMS user interface.

34.1 Search & Filters

The ecoMAILZ plugin for ecoDMS provides the common search features from the Webclient. You can also carry out a cross-archive full-text search between ecoDMS and ecoMAILZ.

- The search and filter features on the ecoMAILZ tab in ecoDMS are the same as in the ecoMAILZ Webclient.
- This chapter focuses on the ecoMAILZ features specific to ecoDMS.
- For all other ecoMAILZ features, refer to the ecoMAILZ manual.

Tip:
- You can also use the full-text search in the ecoDMS client to search for emails in ecoMAILZ.
- To do so, enter the search terms in the ecoDMS search box.
- ecoDMS immediately displays the results in the "Archives" tab.
- The "ecoMAILZ" tab also displays the matching emails.
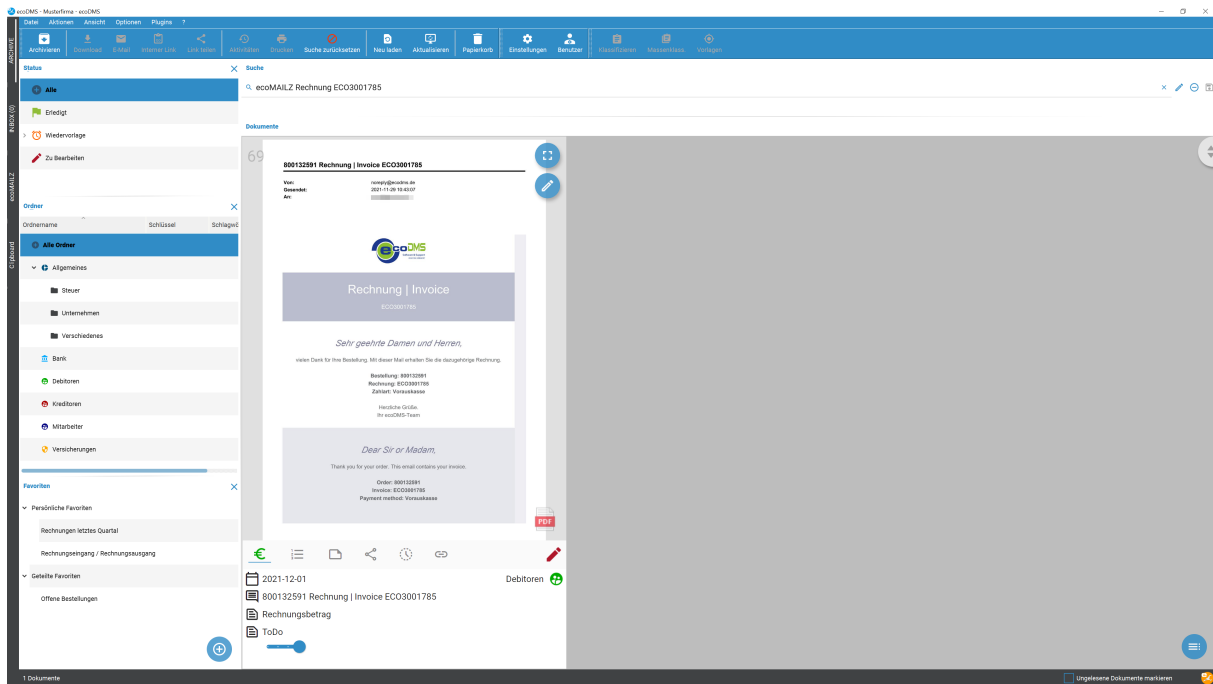- The search term you enter is automatically used to search in ecoMAILZ.

Figure 34.1: ecoMAILZ Plugin in ecoDMS (burns) - Cross-Archive Full-Text Search (Here: Output in the "Archive" Tab of ecoDMS)

34.2 Copy to ecoDMS

- The "Copy to ecoDMS" feature enables users to archive emails (EML files) with attachments in ecoDMS. ecoDMS stores the email including any attachments in the standard EML email format.
- In addition, the message and its attachments are stored in a bundled PDF/A-3 file.
  - **PDF/A-3-format:** You can embed any file type in PDF/A-3. For example, you can add email attachments such as PDF or Office files to a PDF/A-3 document. Thus, if you open a PDF/A-3 file, it contains the plain email text in PDF format and the attachments.
  - In ecoDMS, you can open the PDF/A-3 file in either the card or the table view.
  - In addition, the PDF/A-3 file is displayed in the preview window of ecoDMS.
- If the email contains attachments, they are stored individually in ecoDMS as an attachment to the DocID in the table view
- During the archiving process, ecoDMS executes automatic full-text recognition. This allows the retrieval of email texts and readable attachments via the full-text search.

You can copy your emails - individually, if required - to the document management system via the plugin. To copy the entire email to ecoDMS and archive it, complete the following steps:

1. Select the email in the ecoMAILZ tab of ecoDMS.

2. Click the menu icon in the message.

3. Select the "Copy to ecoDMS" function.

4. The email is prepared for archiving and the classification dialog of ecoDMS opens.

5. Enter the classification information to archive the email in ecoDMS.

a) ecoDMS displays the PDF of your message in the preview window of the classification dialog box.

b) For more information on classification and the general operation of the document management system, refer to the ecoDMS manual.

6. In the classification dialog, confirm the classification and the associated archiving process in ecoDMS with "OK".
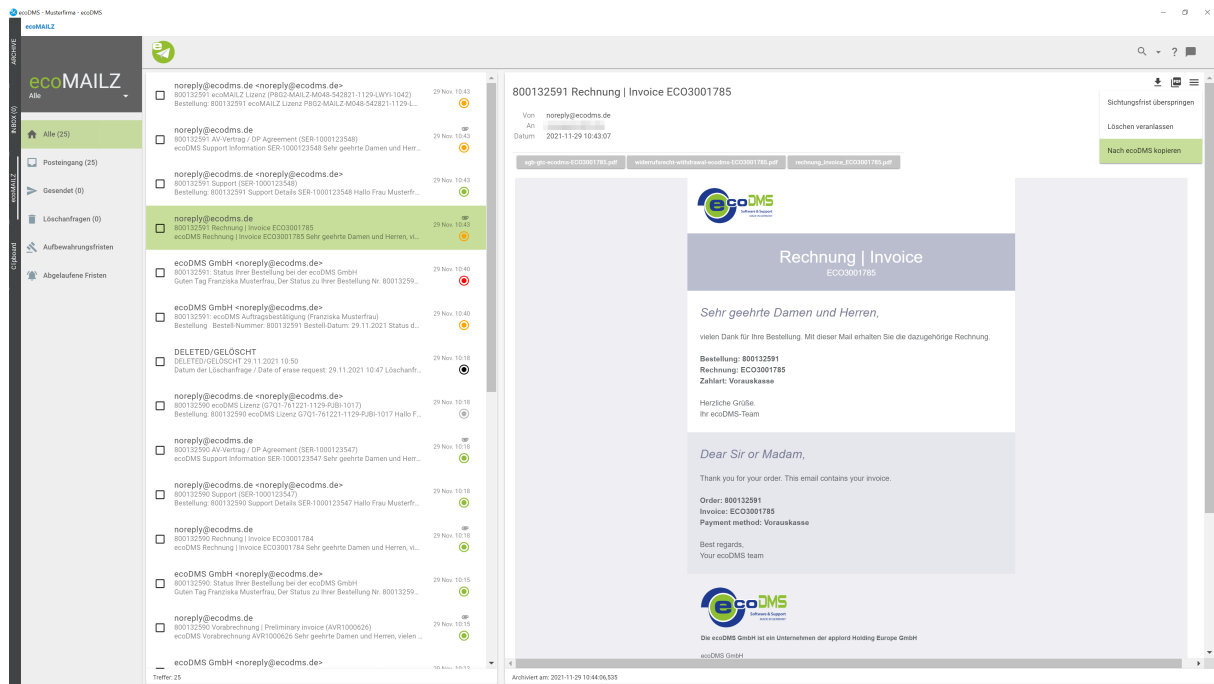

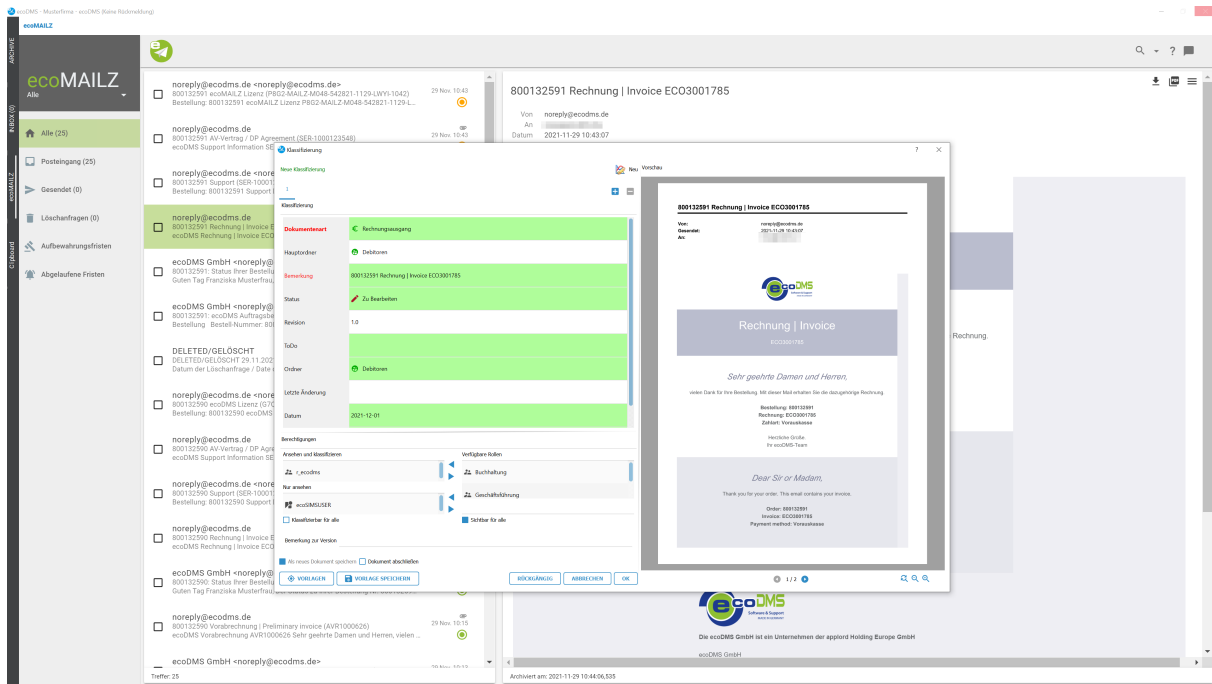Figure 34.2: ecoMAILZ Plugin in ecoDMS (burns) - Copy to ecoDMS

Figure 34.3: ecoMAILZ Plugin in ecoDMS (burns) - Copy to ecoDMS - Classification

34.3 Download

> – You download the emails in the original format, including any attachments.
> – The email is saved in the default target folder for downloads.

To download emails with the download feature, complete the following steps:

1. Select the email in the ecoMAILZ tab in ecoDMS.

2. Click the "Download" icon in the message (arrow points down).

    a) The icon is located at the top right of the main window of the email.

3. The email is downloaded.

4. ecoDMS displays a dialog with further download options:

    a) **Open:** Click the "Open" button to open the original email file.

    > – If the email is already in the download folder, this button is greyed out.
    > – As a rule, the default email client on the respective workstation is used to open the email.

    b) **Copy to ecoDMS:** Click the "Copy to ecoDMS" button to archive the original email file in ecoDMS. The classification dialog box opens. Enter the classification information to archive the email in ecoDMS.

- ecoDMS does not display a preview in the preview window of the classification dialog box (because it is not a PDF file).
- This process only archives the EML file including any attachments (no PDF).
- A preview and a PDF/A-3 file are only created with the direct function call "Copy to ecoDMS" in the email menu of the message.
- For more information on classification and the general operation of the document management system, refer to the ecoDMS manual.

c) **Display Download Folder:** Click the "Display Download Folder" button to open the folder in the file system.

d) **Cancel:** If you do not want to execute any of the above mentioned options, click "Cancel".
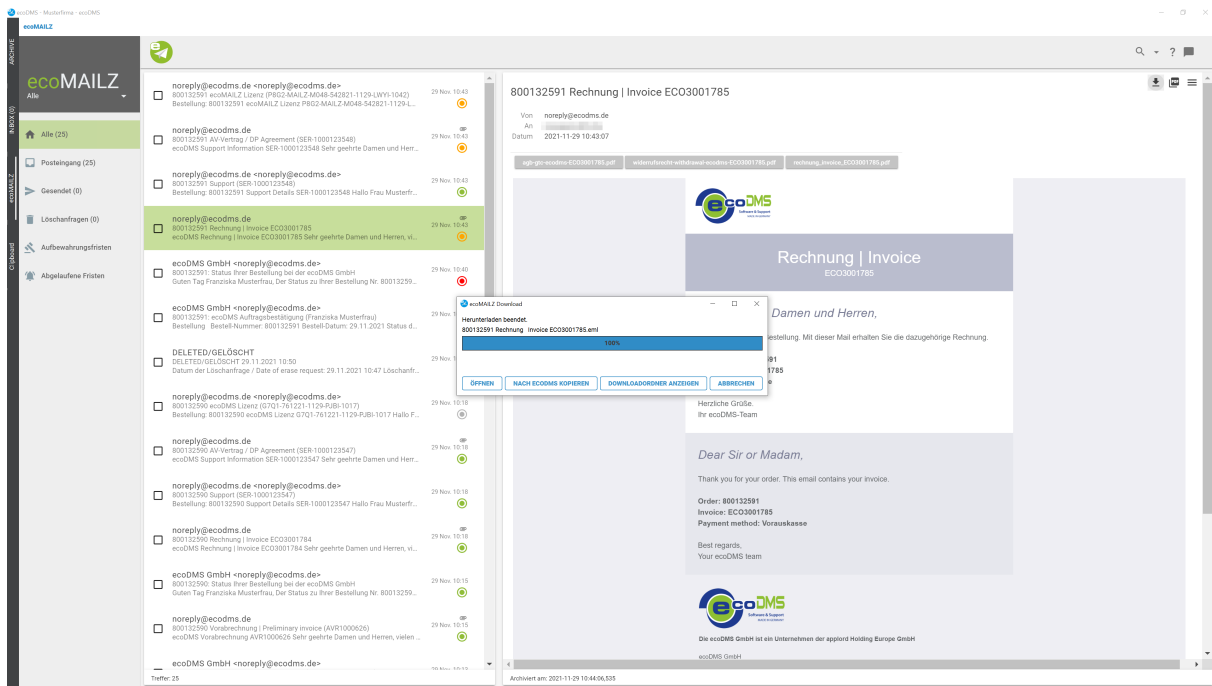

Figure 34.4: ecoMAILZ Plugin in ecoDMS Version 18.09 - Download (Here: Complete Email as EML File)
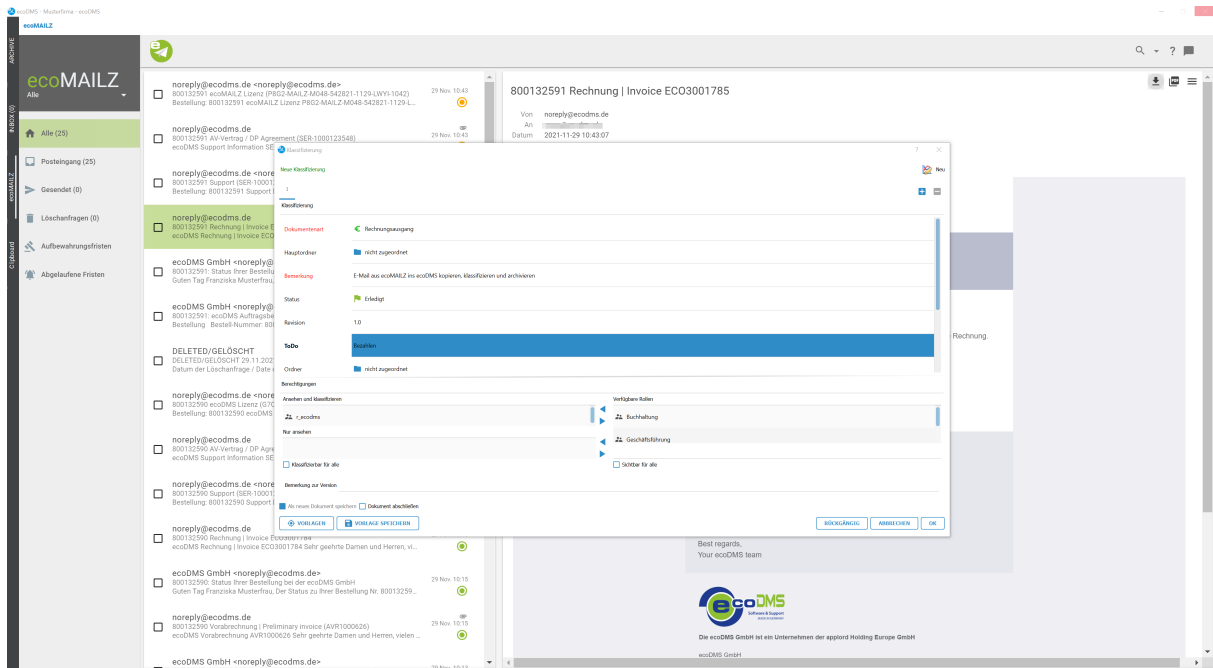
Figure 34.5: Email Options - Download - Classification of the Original Email

34.4 Download (PDF)

To download an email as PDF/A3 file, complete the following steps:

1. Select the email in the ecoMAILZ tab in ecoDMS.

    a) Desktop/PC/Screen: The email is highlighted in green.

2. Click the "Download (PDF)" icon in the email.

    a) The icon is located at the top right of the main window of the email.

3. The message, including any attachments, is converted into a PDF/A-3 file and downloaded. This process may take a while depending on the file content and size.

> **PDF/A-3-format:** You can embed any file type in PDF/A-3. For example, you can add email attachments such as PDF or Office files to a PDF/A-3 document. Thus, if you open a PDF/A-3 file, it contains the plain email text in PDF format and you also have access to the attachments within the PDF/A-3 file (refer to the second figure in this section).

4. ecoDMS displays a dialog with further download options:

    a) **Open:** Click the "Open" button to open the PDF/A-3 email file.

    > – If the email is already in the download folder, this button is greyed out.
    > – The email opens in the software specified for opening PDF files on your workstation.

    b) **Copy to ecoDMS:** Click the "Copy to ecoDMS" button to archive the PDF file of the email in ecoDMS. The classification dialog box opens. Enter the classification information to archive the email in ecoDMS.

- – ecoDMS displays a preview in the preview window of the classification dialog box.
- – ecoDMS only archives the PDF file.
- – For more information on classification and the general operation of the document management system, refer to the ecoDMS manual.

c) **Display Download Folder:** Click the "Display Download Folder" button to open the folder in the file system.

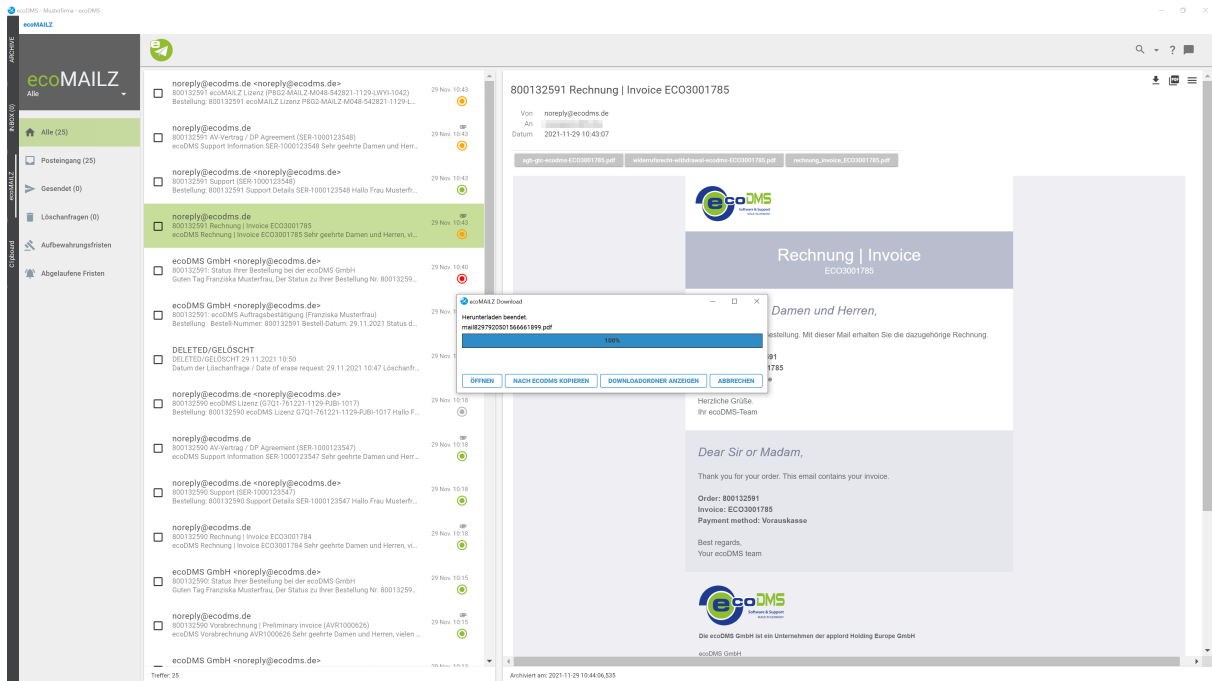d) **Cancel:** If you do not want to execute any of the above mentioned options, click "Cancel".
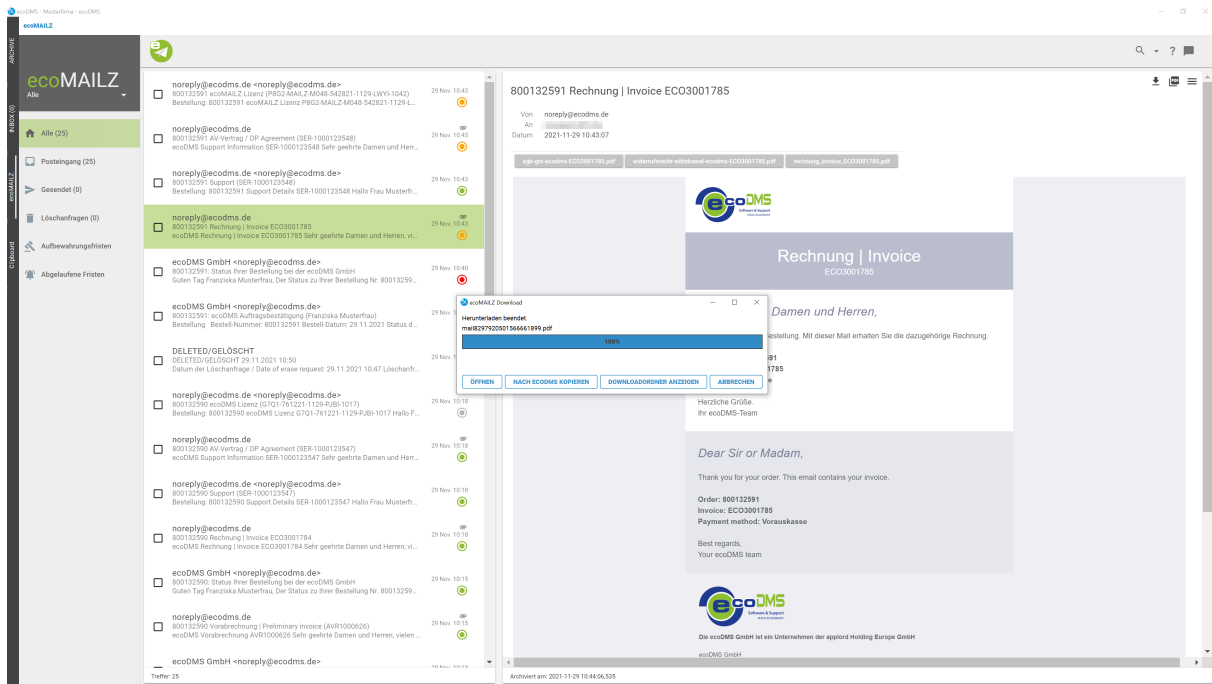

Figure 34.6: Email Options - Download (PDF)

Figure 34.7: Email Options - Download (PDF)- Classification

35 ecoDMS Server

ecoDMS saves all settings, user information and classifications in a database of ecoDMS Server. The archived files and documents are securely encrypted and stored in containers. Spreading information across containers and a database offers more security and flexibility when managing data.

35.1 postgreSQL Database

ecoDMS uses postgreSQL, a free, cross-platform component, as its database. In contrast to most other databases, the database volume of postgreSQL is virtually unlimited. As postgreSQL is an open source database, no additional costs are incurred for using this database.

35.2 Container Storage System

The archived files and documents are stored safely encoded in containers within the user's ecoDMS server. The default data volume of such a container is approx. 500 MB. This is a fixed value specified by ecoDMS. As soon as the data volume is reached, the system automatically creates a new container. The "full" container, of course, will continue to exist. The maximum number of containers is unlimited in ecoDMS. The automatic generation of different containers makes data backup much easier. During the backup process the containers can be backed up separately and independent of the postgreSQL database.

35.3 Stop ecoDMS Server

This chapter describes how ecoDMS Server can be stopped if necessary.

35.3.1 Windows: Explanation

To stop the server under Ubuntu / Debian, complete the following steps:

1. Make sure that no other users are working with ecoDMS or are connected to ecoDMS Server.
    a) First, exit all Connection Managers connected to the server.
    b) Check and close all other connections to the server (e.g. web client...).

2. Open the "Services" manager of your windows system.

3. Select the service "ecoDMS Server 18.09".

4. Click "Stop the service".
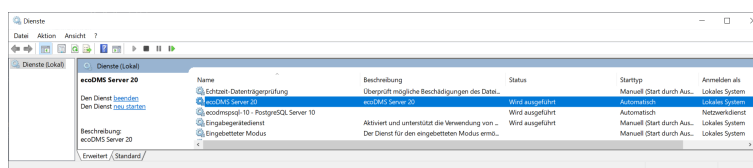   a) The server is stopped (this may take some time).

Figure 35.1: Windows - Services - ecoDMS Server

35.3.2 Ubuntu / DebiTo: Explanation

This chapter describes how ecoDMS Server can be started if necessary.

1. Make sure that no other users are working with ecoDMS or are connected to ecoDMS Server.
    a) First, exit all Connection Managers connected to the server.
    b) Check and close all other connections to the server (e.g. web client...).

2. Open the console.

3. Stop the server with the following command:

```
sudo service ecodms stop
```

35.4 Start ecoDMS Server

This chapter describes how ecoDMS Server can be started when needed.

35.4.1 Windows: Explanation

To (re)start the server under Windows, complete the following steps:

1. Make sure that no other users are working with ecoDMS or are connected to ecoDMS Server.
    a) First, exit all Connection Managers connected to the server.
    b) Check and close all other connections to the server (e.g. web client...).

2. Open the "Services" manager of your windows system.

3. Select the service "ecoDMS Server 18.09".

4. Click "Start" to start the service.
    a) The server is started (this may take some time).

5. If the operation was successful, you can reconnect the Connection Manager and all other connections to ecoDMS Server.
    a) Please note that depending on the computer, the server might need some time until it is completely booted and the connection is established.
    b) Please wait a few minutes and then try to connect to the server.
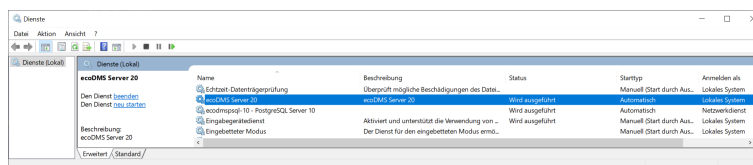
Figure 35.2: Windows - Services - ecoDMS Server

35.4.2 Ubuntu / DebiTo: Explanation

To start the server under Ubuntu / Debian, complete the following steps:

1. Make sure that no other users are working with ecoDMS or are connected to ecoDMS Server.
    a) First, exit all Connection Managers connected to the server.
    b) Check and close all other connections to the server (e.g. web client...).

2. Open the console.

3. Start the server with the following command:

```
sudo service ecodms start
```

4. If the operation was successful, you can reconnect the Connection Manager and all other connections to ecoDMS Server.

a) Please note that depending on the computer, the server might need some time until it is completely booted and the connection is established. Please wait a few minutes and then try to connect to the server.

36 WORKZ Add-on (Optional Extension)

- You need to purchase a license for the WORKZ add-on, but you can also test it in the ecoDMS trial version for free and without any obligation.
- It is an optional extension for the document management system.

The WORKZ add-on is an optional extension for the ecoDMS document management system. It allows you to automate recurring document management tasks, such as

- Kenntnisnahme und Freigabe von Dokumenten

- digital stamp for process documentation

- document and file import from the file system

- email import including attachments

36.1 Install and Activate License

- The WORKZ add-on does not require manual installation.
- You activate the add-on with the ecoDMS license and you can test it in the ecoDMS trial version for free and without any obligation.
- Please refer to the ecoDMS installation manual for more information on how to install the add-on, particularly under Linux and NAS.
- When updating ecoDMS, you must refer to the information in the installation manual.

- You can purchase the WORKZ add-on in the ecoDMS online shop to add it to your ecoDMS license.
- The license period of the add-on corresponds with the (remaining) update period of your ecoDMS license number from the point in time you purchased the add-on.
- Following the expiry of this period, the add-on will be deactivated automatically.

The administrator activates and manages the purchased ecoMAILZ license on the Settings page in ecoDMS. On the "License" tab in the "Settings", you can display and manage your license information. Refer to the ecoDMS manual for more information on activating and deactivating the license.
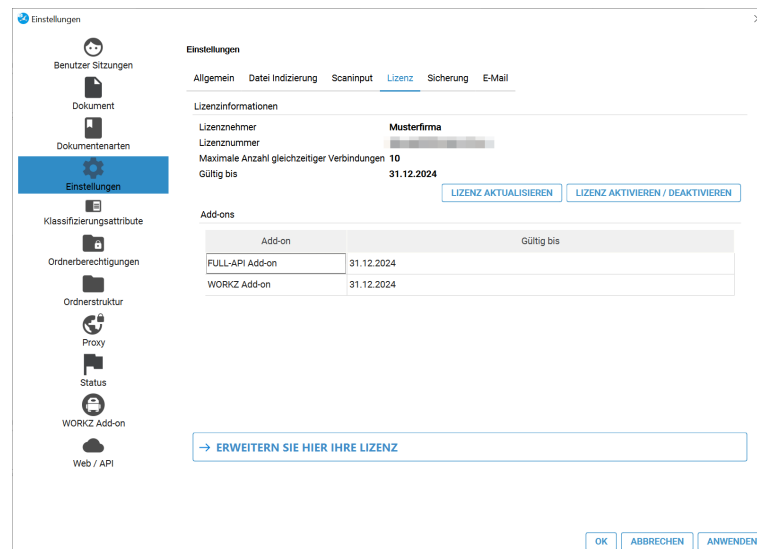
Figure 36.1: Settings - Settings - License (Here: Full Version with Full API and ecoWORKZ Add-on)

36.2 WORKZ Settings Dialog

– To display WORKZ in the Settings dialog, you need three prerequisites:
  1. The add-on is licensed
  2. The user is either an ecoDMS administrator
  3. or has an administrator permission for the WORKZ add-on
– To apply the settings for WORKZ, users must exit the ecoDMS client, disconnect the connection via the Connection Manager, and then reconnect

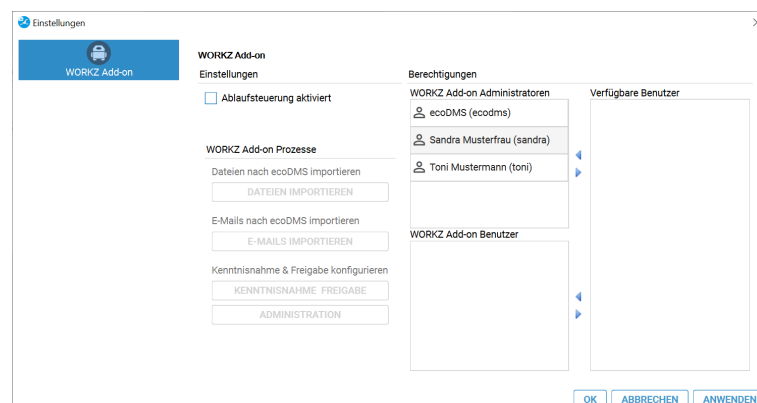In the ecoDMS client Settings dialog, use the "WORKZ" tab to configure the WORKZ add-on and assign permissions.

Figure 36.2: Settings - WORKZ Add-on

36.3 Activate and Assign Permissions for Process Control

> For more information about individual features, refer to the corresponding chapter in this manual.

Enable Process Control to enable the following features: Acknowledgement and approval, including digital stamp, email import, file import.

36.3.1 Funktionen aktivieren

1. In the ecoDMS Settings, open the "WORKZ" tab (refer to 36.2)

2. Enable **Process control enabled**

3. Confirm the message with "OK"

4. Save the setting with "Apply"

5. To enable the new settings, exit the ecoDMS client, disconnect the connection via the Connection Manager, and then reconnect.
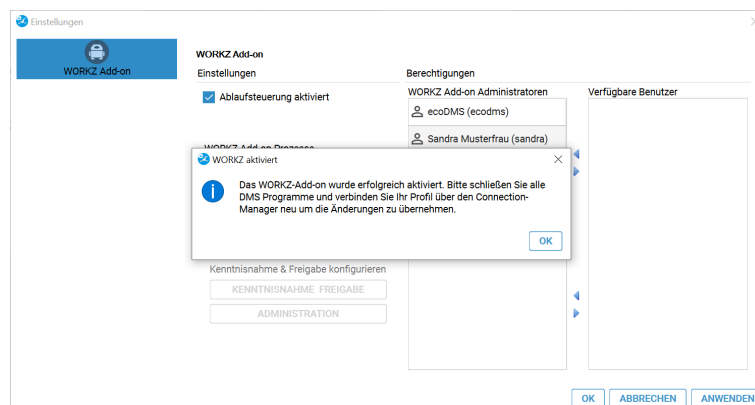

Figure 36.3: Settings - WORKZ Add-on - Enabled

36.3.2 Assign Permissions for Features

> – To enable permissions, exit the ecoDMS client and reconnect via the Connection Manager.

If you enable Process Control (refer to 36.3) in the Settings, you can define permissions in the "Permissions" section for the following WORKZ features:

1. Use the arrows to drag the users to the respective areas.
   a) **Available users:** The area "Available Users" lists all available users.
   b) **WORKZ administrators:** All users in this list can access the "WORKZ" tab in the ecoDMS Settings dialog. On the "WORKZ" tab, users can define configurations and processes.
   c) **WORKZ users:** All users in this list have the permission to use the processes assigned to them in the WORKZ add-on.

2. Confirm the settings with "Apply" and/or "OK".

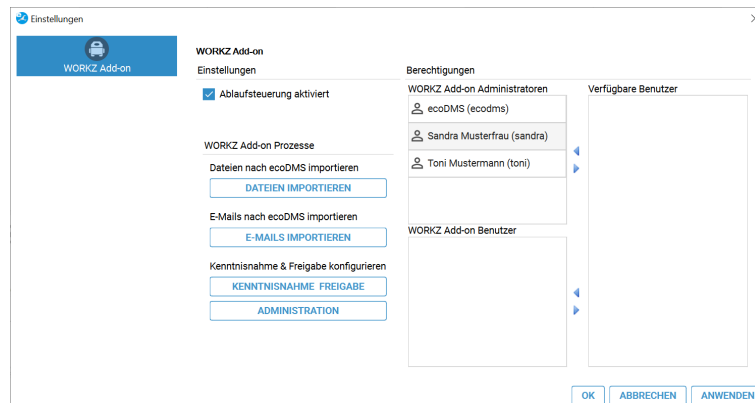3. Click "Cancel" to exit the Settings.

Figure 36.4: Settings - WORKZ Add-on - Permissions

36.4 Managing Acknowledgements and Approvals

As a WORKZ administrator, you can view current approval and acknowledgement processes and intervene in processes, This feature allows you to, for example, stop processes. Moreover, you can see which user has already worked on a process and which operations are still open.

1. Open the ecoDMS Settings

2. Options -> Settings -> Tab: WORKZ Add-on (refer to 36.2)

3. In the "Acknowledgements and Approvals" area, click "Administration".

4. The following features are available for the individual processes:
    a) Green arrow: Approve all / Acknowledge all
    b) Crossed out red circle: Reject all (only visible for approvals)
    c) Red circle with X: Cancel all (for approvals and acknowledgements

Figure 36.5: Settings - WORKZ Add-on - Permissions

36.5 Configure Notifications for Users

An item is added in the Configuration area for all roles (also individual user roles) when the WORKZ add-on is activated. Here you can configure the type of notification you want to send to the user (role) by email. To receive notifications, users need to have an email address in their profile. To define notifications, complete the following steps:

1. Log on to ecoDMS as administrator.

2. Click Options - User to open User and Group Management (refer to chapter 5.2)

3. Select an entry in the "Available Roles" area

   a) Before the dialog opens, ecoDMS checks whether an SMTP connection is saved in Options - Settings - Settings - Email (refer to chapter 6.4.6). If this is not the case, an error message displays.

   b) Make sure that valid email addresses have already been added to the user / role

4. Select the email notifications you want to send to the individual role (user, user group). The following check boxes are available:

   a) Email notification for new tasks

   b) Email notification for approval / acknowledgement from another user

   c) Email notification when approval from another user is denied
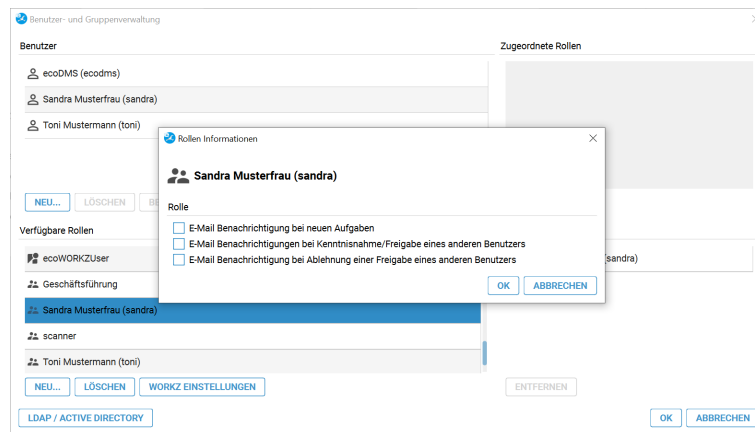
5. Confirm the message with "OK"

Figure 36.6: User Management - Role Information for Email Notification Settings

36.6 Import Files

In ecoDMS you can import files automatically from a specified folder that is on the same instance as the ecoDMS server.

36.6.1 Set Up One-Time (Manual) Import

- You can control this feature from the Settings dialog in the ecoDMS client.
- Validations before saving:
  - No file import with the same name may exist
  - No file import with the same folder may exist
  - "Repeat" for import mode: The Cron setting must have a minimum time difference of 10 minutes
  - When executing "Move after download" and "Include Subfolders", the folder to which the files are moved must not be a subfolder of the folder, from which you are downloading.

1. Open the ecoDMS Settings:

2. Options -> Settings -> Tab: WORKZ Add-on

3. Processes: Import files to ecoDMS

4. Click "New"

5. **Name:** Enter a name for the import

6. **Execution mode:** Choose the interval in which you want the WORKZ add-on to check the folder for new files. Enable the respective radio button.

   a) One-time: Allows you to start manual import after saving

      i. To start importing, save, and in the view of configured file imports, click "One-Time Execution" and confirm the message

7. **Archiving mode:** You can assign a uniform classification to the imported documents or copy them to an ecoDMS scaninput folder

   a) **Classify:** In WORKZ, click the icon to start the ecoDMS classification dialog. The classification you specify here applies to each imported document

      i. **Apply file name to:** The file name of documents you import can be applied to an available classification text box (e.g. Comment)

b) **Copy to next Scaninput:** If you want to classify from the ecoDMS inbox (e.g. with an automatic classification template), you can move the documents you want to import to an ecoDMS scaninput folder

- The inbox can receive PDF and TIFF files, whereby incoming TIFF files are automatically converted to PDF files in a background process and are then displayed as PDF.
- If other file formats are in the import folder, they will not be included.

c) **Finalise Document:** Once you have archived the document, you can no longer modify the document or create a new version. Otherwise the documents can be versioned with version control

8. **Import folder:** This folder contains the documents you want to archive automatically in ecoDMS (excluded: workdir / scaninput)

a) **Include subfolders:** Files from the import folder and all files from all subfolders are automatically imported to ecoDMS

9. **Action after archiving:** Choose an action for the documents after archiving

a) **Delete files:** Removes the original files from the import folder once they have been imported to ecoDMS

b) **Move files to:** Moves files to the selected folder after archiving

10. **Save** with "OK"

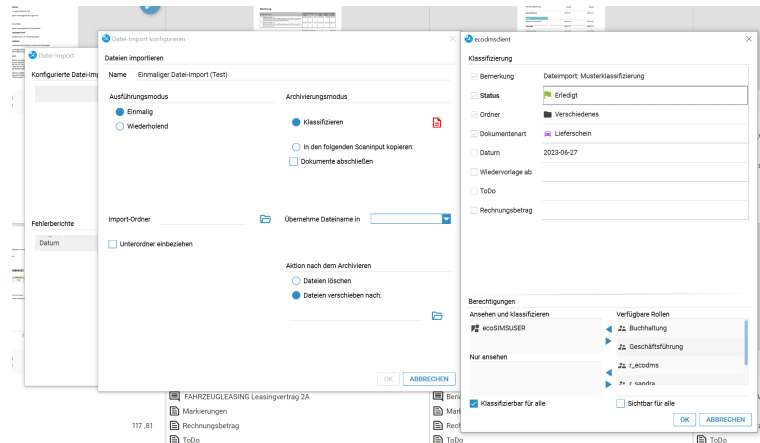Figure 36.7: Settings - File Import (Here: One-Time) - Example

Figure 36.8: Settings - File Import (Here: One-Time) - Classification - Example

36.6.2 Configure Recurring (Automatic) Import

- You can control this feature from the Settings dialog in the ecoDMS client.
- Validations before saving:
  - No file import with the same name may exist ▫ No file import with the same folder may exist
  - "Repeat" for import mode: The Cron setting must have a minimum time difference of 10 minutes
  - When executing "Move after download" and "Include Subfolders", the folder to which the files are moved must not be a subfolder of the folder, from which you are downloading.

1. Open the ecoDMS Settings

2. Options -> Settings -> Tab: WORKZ Add-on

3. Processes: Import files to ecoDMS

4. Click "New"

5. **Name:** Enter a name for the import

6. **Execution mode:** Choose the interval in which you want the WORKZ add-on to check the folder for new files. Enable the radio button
   a) Recurring: Executes the import in a specified interval. Click the "Plan" icon to specifiy the interval.
      - **Step:**
        - Start: Specifies the minute (hour, ...) a process starts
        - Step: specifies the interval If you specify a step with the value 15, the process repeats every 15 minutes.
      - **Interval:**
        - Specifies the interval for the process.
        - Example: Min=10 and Max=30 means that the process only runs between minute 10 and minute 30. (e.g. 3.10 p.m - 3.30 p.m)

7. **Archiving mode:** You can assign a uniform classification to the imported documents or copy them to an ecoDMS scaninput folder
   a) **Classify:** In WORKZ, click the icon to start the ecoDMS classification dialog. The classification you specify here applies to each imported document
      i. **Apply file name to:** The file name of documents you import can be applied to an available classification text box (e.g. Comment).

b) **Copy to next Scaninput:** If you want to classify from the ecoDMS inbox (e.g. with an automatic classification template), you can move the documents you want to import to an ecoDMS scaninput folder

- – The inbox can receive PDF and TIFF files, whereby incoming TIFF files are automatically converted to PDF files in a background process and are then displayed as PDF.
- – If other file formats are in the import folder, they will not be included.

c) **Finalise Document:** Once you have archived the document, you can no longer modify the document or create a new version. Otherwise the documents can be versioned with version control

8. **Import folder:** This folder contains the documents you want to archive and automatically import to ecoDMS

a) **Include subfolders:** Files from the import folder and all files from all subfolders are automatically imported to ecoDMS

b) **Batch size:** The batch size for automatic file imports refers to the number of files that are processed concurrently in a batch process when importing them to ecoDMS

9. **Action after archiving:** Choose an action for the documents after archiving

a) **Delete files:** Removes the original files from the import folder once they have been imported to ecoDMS

b) **Move files to:** Moves files to the selected folder after archiving

10. **Speichern** mit "OK"

Figure 36.9: Settings - File import (Here: Recurring)

Figure 36.10: Settings - File import - Recurring - Specify Interval

Figure 36.11: Settings - File Import (Here: Recurring) - Classification

36.6.3 Execute Import Manually

You can execute the imports manually:

1. Open the ecoDMS Settings

2. Options -> Settings -> Tab: WORKZ Add-on

3. Processes: Import files to ecoDMS

4. Select the process from the "Configured File Imports" and in the "Actions" column click "Run Once"

   a) **One-time Import:** Click "Run Once" to start non-automatic imports manually

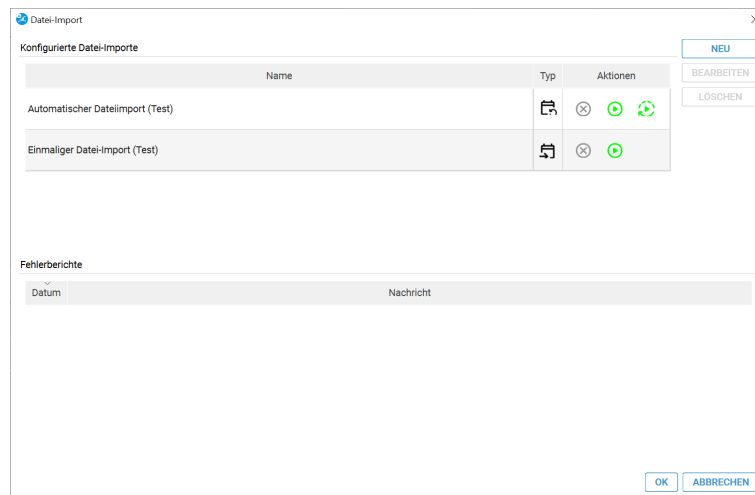   b) **Recurring Import:** You can also execute an automatic import manually

Figure 36.12: Settings - File Import - Process Overview

36.6.4 Edit Import

– You can control this feature from the Settings dialog in the ecoDMS client.
– Validations before saving:
  – No file import with the same name may exist
  – No file import with the same folder may exist
  – "Repeat" for import mode: The Cron setting must have a minimum time difference of 10 minutes
  – When executing "Move after download" and "Include Subfolders", the folder to which the files are moved must not be a subfolder of the folder, from which you are downloading.

You can edit the imports you save.

1. Open the ecoDMS Settings

2. Options -> Settings -> Tab: WORKZ Add-on

3. Processes: Import files to ecoDMS

4. Click a process in the "Configured file imports" overview and click "Edit".

5. Make your edits

6. Save with "OK"

36.7 Import Emails

– To access this feature, you require "ecoSIMSAdmin" (administrator) permissions.
– You can control this feature from the Settings dialog in the ecoDMS client.
– Test the connection to make sure you can create/modify the data for email import
– For every import ecoDMS establishes a separate connection

In ecoDMS, you can import emails automatically from different mail servers and groupware solutions.

36.7.1 Set Up Microsoft 365 Mail Import

- To set up and use the import for Microsoft 365, you need to make some basic settings in Azure.
- For more information, refer to the notes in the ecoDMS knowledge base, where you can learn more about the required settings in Azure.
- Use the following link to access the knowledge base:

  `https://confluence.applord-gruppe.eu/ek`

1. Open the ecoDMS Settings

2. Options -> Settings -> Tab: WORKZ Add-on

3. Processes: Import emails to ecoDMS

4. Click "New"

5. **Name:** Enter a name for the import

6. **Connection (Microsoft 365):** Imports emails from Microsoft 365

7. **Einstellungen (Mail-Icon):** Mit einem Klick auf das Icon können die notwendigen Mailserver-Einstellungen vorgenommen werden
   - **Name:** Enter a name for the import
   - **Folder ID (Client):** The Microsoft 365 folder ID (client) is a unique identifier that you assign to a Microsoft 365 folder to identify the resources and users within this folder
   - **Application ID (Client):** The Microsoft 365 application ID (client) is a unique identifier that you assign to identify an application or a service within a Microsoft 365 folder to enable interaction between applications or services and the folder
   - **Application Password:** Microsoft 365 uses the term "Secret" for classified information such as access keys, login data and other passcodes used to protect applications and services. Enter the secret client key associated with the application created in Azure
   - **Application User (ID or Email):** A Microsoft 365 application user is a special type of user account used for accessing resources and data with an application
   - **Test Connection:** The system checks the mail server configurations.
   - After verification, click "OK" to save the import

8. **Import folder:** If the test was successful, WORKZ displays the available mail folders of the mail server you configured. Select the folder, from which you want to import emails to ecoDMS

9. **Execution mode:** Choose how often the WORKZ add-on checks the new emails. Enable the respective radio button.
   a) One-time: Allows you to start manual import after saving
      i. Click the "Run Once" start icon and confirm the message to start importing after you clicked Save in the overview of the configured email imports
   b) Recurring: Executes the import in the selected interval
      i. Enables the "Batch Size"
         - **Batch size:** The batch size for automatic email import refers to the number of files that are processed concurrently in one batch process
      ii. Click the "Plan" icon to specify the interval
         - **Step:**
            - Start: Specifies the minute (hour, ...) a process starts

- – Step: specifies the interval If you specify a step with the value 15, the process repeats every 15 minutes
- – **Interval:**
    - – Specifies the interval for the process
    - – Example: Min=10 and Max=30 means that the process only runs between minute 10 and minute 30. (e.g. 3.10 p.m - 3.30 p.m)

10. **Archiving mode:** You can assign a uniform classification to the imported documents or copy them to an ecoDMS scaninput folder

    a) **Classify:** In WORKZ, click the icon to start the ecoDMS classification dialog. The classification information is applied to all emails during the import process

        i. **Associate Email Information:** If "Classification" is enabled, ecoDMS uses the email information for association:

- – <u>Subject:</u> You can associate a subject with a text attribute (e.g. a comment)
- – <u>Date of receipt:</u> You can associate a date of email receipt with a text and date attribute
    - – If only a date is available, only the date is set
    - – If a text is available, a timestamp is set (yyyy-MM-dd HH:mm:ss)
- – <u>Send date:</u> You can associate an email send date with a text and date attribute
    - – If only a date is available, only the date is set
    - – If a text is available, a timestamp is set (yyyy-MM-dd HH:mm:ss)
- – <u>From:</u> You can associate the email sender address with a text attribute
- – <u>To:</u> You can associate email recipients with a text attribute
    - – Separate multiple recipients with a comma
- – <u>CC:</u> CC-You can associate email recipients with a text attribute
    - – Separate multiple recipients with a comma
- – <u>BCC:</u> BCC-You can associate email recipients with a text attribute
    - – Separate multiple recipients with a comma
- – Attachment name: You can associate the file name of the attachment with a text attribute
    - – This only applies when archiving attachments
    - – If "Email classification for attachments" is enabled and the attribute is populated, the classification attribute for attachments is overwritten

    b) **Copy to next Scaninput:** If you want to classify email attachments from the ecoDMS inbox (for example, via automatic classification template), the email attachments for the import can be moved to an ecoDMS scaninput folder

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- – This feature is only available for email attachments = Archive attachments only
- – The inbox can receive PDF and TIFF files, whereby incoming TIFF files are automatically converted to PDF files in a background process and are then displayed as PDF.
- – If other file formats are in the import folder, they will not be included.

---

11. **Email Filters:** Specifies the email type you want to import in ecoDMS

    a) <u>All emails</u>

       OR

    b) <u>Unread emails only</u>

- – <u>Emails with attachments only:</u> In addition, you can specify that only emails with attachment are included

12. **Attachment Filters:** Specifies the attachment type you want to archive in ecoDMS

a) All attachments
b) File types
    i. Specifies which file types (e.g. JPG; TIFF; PDF...) you want to archive. Separate multiple file types with a semicolon ";"

13. **Archive...**
    a) Email with attachments: Imports emails and all associated attachments (via Attachment Filter setting) to the archive
    b) Email without attachments: Imports emails to the archive without attachments
    c) Attachments only: Imports email attachments only (via Attachment Filter setting)
    d) Archive inline attachments as document: Saves inline attachments as separate documents to the archive

14. **Action after archiving:** Choose the action for emails after archiving
    a) **Delete email:** Removes emails from mail server after they were imported to ecoDMS
    b) **Move emails to:** Moves emails to the selected mail folder after archiving
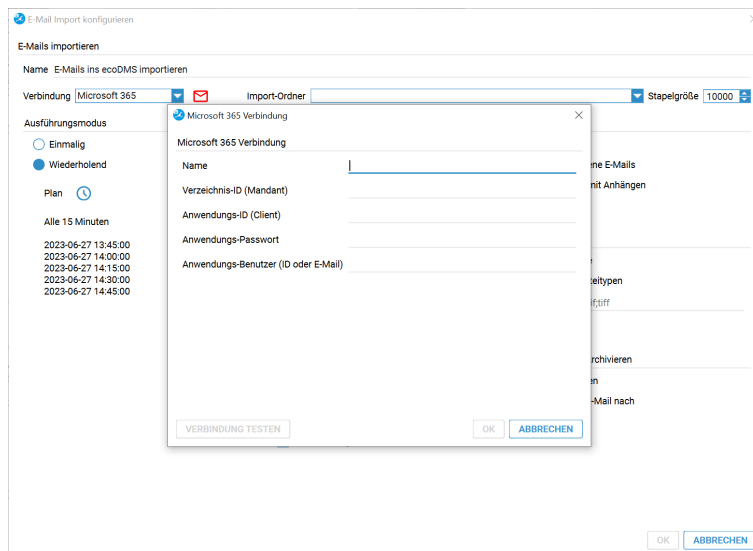
15. **Save** with "OK"

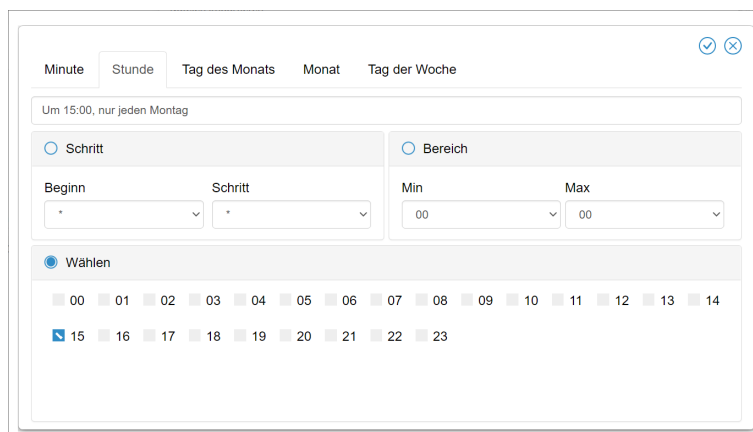Figure 36.13: Settings - Mail Import - Microsoft 365 Connection

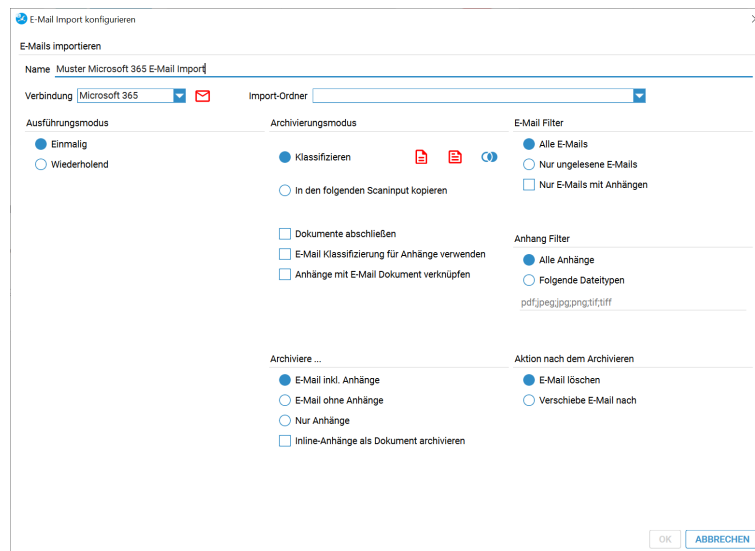Figure 36.14: Settings - Mail Import - Repeating - Choose Interval

Figure 36.15: Settings - Mail Import (Here: Microsoft 365) - Empty

36.7.2 Configure IMAP Mail Import

1. Open the ecoDMS Settings

2. Options -> Settings -> Tab: WORKZ Add-on

3. Processes: Import emails to ecoDMS

4. Click "New"

5. **Name:** Enter a name for the import

6. **Connection (IMAP):** Imports emails from IMAP

7. **Settings (Mail Icon):** Click the icon to make the mail server settings
   - **Name:** Enter a name for the import
   - **Server:** Enter the address of your email server. This can, for example, be an IP address or a server name, depending on your mail server configuration
     - **Port:** Enter the server port for the inbox of your email server
     - **Username:** Enter the username for the email account you want to archive
     - **Password:** Enter the password associated with the username.
     - **Type:** IMAP
     - **Connection Encryption:** Select the encryption: None, SSL/TLS, STARTTLS
     - **Ignore Certificate Error (insecure):** If you want to ignore certificate errors when archiving, enable this feature
     - **Test Connection:** The system checks the mail server configurations.
     - After verification, click "OK" to save the import

8. **Import folder:** If the test was successful, WORKZ displays the available mail folders of the mail server you configured. Select the folder, from which you want to import emails to ecoDMS

9. **Execution mode:** Choose how often the WORKZ add-on checks the new emails. Enable the respective radio button.
   a) One-time: Allows you to start manual import after saving
      i. Click the "Run Once" start icon and confirm the message to start importing after you clicked Save in the overview of the configured email imports
   b) Recurring: Executes the import in the selected interval

     i. Enables the "Batch Size":

       – **Batch size:** The batch size for automatic email import refers to the number of files that are processed concurrently in one batch process

     ii. Click the "Plan" icon to specify the interval

       – **Step:**

        – Start: Specifies the minute (hour, ...) a process starts

        – Step: specifies the interval If you specify a step with the value 15, the process repeats every 15 minutes

       – **Interval:**

        – Specifies the interval for the process

        – Example: Min=10 and Max=30 means that the process only runs between minute 10 and minute 30. (e.g. 3.10 p.m - 3.30 p.m)

10. **Archiving mode:** You can assign a uniform classification to the imported documents or copy them to an ecoDMS scaninput folder

    a) **Classify:** In WORKZ, click the icon to start the ecoDMS classification dialog. The classification information is applied to all emails during the import process

     i. **Associate Email Information:** If "Classification" is enabled, ecoDMS uses the email information for association:

       – Subject: You can associate a subject with a text attribute (e.g. a comment)

       – Date of receipt: You can associate a date of email receipt with a text and date attribute

        – If only a date is available, only the date is set

        – If a text is available, a timestamp is set (yyyy-MM-dd HH:mm:ss)

       – Send date: You can associate an email send date with a text and date attribute

        – If only a date is available, only the date is set

        – If a text is available, a timestamp is set (yyyy-MM-dd HH:mm:ss)

       – From: You can associate the email sender address with a text attribute

       – To: You can associate email recipients with a text attribute

        – Separate multiple recipients with a comma

       – CC: CC-You can associate email recipients with a text attribute

        – Separate multiple recipients with a comma

       – BCC: BCC-You can associate email recipients with a text attribute

        – Separate multiple recipients with a comma

       – Attachment name: You can associate the file name of the attachment with a text attribute

        – This only applies when archiving attachments

        – If "Email classification for attachments" is enabled and the attribute is populated, the classification attribute for attachments is overwritten

    b) **Copy to next Scaninput:** If you want to classify email attachments from the ecoDMS inbox (for example, via automatic classification template), the email attachments for the import can be moved to an ecoDMS scaninput folder

       – This feature is only available for email attachments = Archive attachments only

       – The inbox can receive PDF and TIFF files, whereby incoming TIFF files are automatically converted to PDF files in a background process and are then displayed as PDF.

       – If other file formats are in the import folder, they will not be included.

11. **Email Filters:** Specifies the email type you want to import in ecoDMS

    a) All emails

    OR

    b) Unread emails only

    – Emails with attachments only: In addition, you can specify that only emails with attachment are included

12. **Attachment Filters:** Specifies the attachment type you want to archive in ecoDMS

    a) All attachments

    b) File types

       i. Specifies which file types (e.g. JPG; TIFF; PDF...) you want to archive. Separate multiple file types with a semicolon ";"

13. **Archive...**

    a) Email with attachments: Imports emails and all associated attachments (via Attachment Filter setting) to the archive

    b) Email without attachments: Imports emails to the archive without attachments

    c) Attachments only: Imports email attachments only (via Attachment Filter setting)

    d) Archive inline attachments as document: Saves inline attachments as separate documents to the archive

14. **Action after archiving:** Choose the action for emails after archiving

    a) **Delete email:** Removes emails from mail server after they were imported to ecoDMS

    b) **Move emails to:** Moves emails to the selected mail folder after archiving 15. Save with "OK"
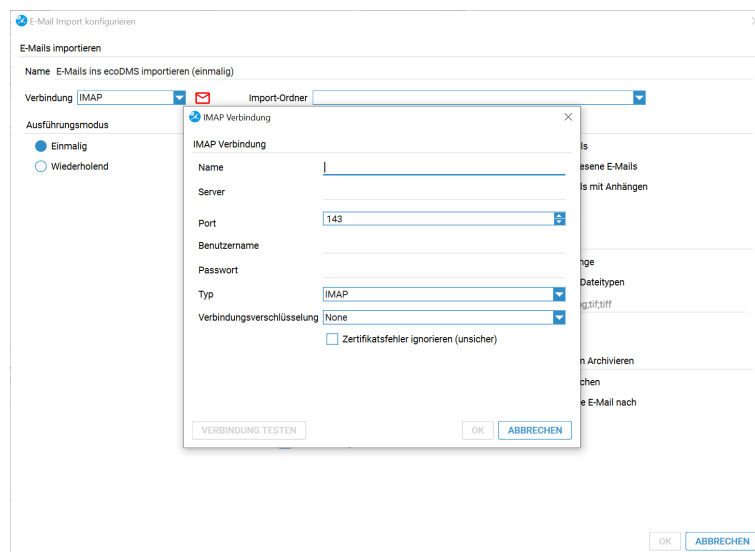
15. **Save** with "OK"

Figure 36.16: Settings - Mail Import - IMAP Connection

Figure 36.17: Settings - Mail Import - Repeating - Choose Interval

Figure 36.18: Settings - Mail Import (Here: IMAP) - Blank

36.8 Acknowledgement

Please note the following information for the ecoWORKZ version:

- PDF files are only included when executing an acknowledgement or approval process is executed.
- Once a process was started, it may take several minutes until the acknowledgements and approvals appear in the task list of the responsible user.
- If multiple users or groups are involved in a process, acknowledgements and approvals appear in their task list as soon as the previous user or group has finished their task. The order of the assigned users is determined by the process settings.

Use the WORKZ add-on in ecoDMS to pass business PDF files to the responsible staff for acknowledgement. This helps you digitalize and automate your acknowledgement processes.

36.8.1 Configure Acknowledgements

To configure an acknowledgement process, complete the following steps:

1. Open the ecoDMS Settings

2. Options -> Settings -> Tab: WORKZ Add-on

3. Click the "Acknowledgement & Approval" button.

4. Click "New"

5. **Name:** Enter a process name

6. **Assigned Participants:** Drag users and/or groups participating in the process from "Available Users & Groups" to the "Assigned Participants" pane.

    a) **Group Assignment:** If you select at least one user group or system permission, you have the following options:

        i. **One Member:** From all selected participants, 1 member must confirm the acknowledgement to finalize and end the process

        ii. **All Members:** All selected participants must confirm the acknowledgement to finalize and end the process

7. **Action (Acknowledgement):** Select the "Acknowledgement" radio button.

8. **Classify after Acknowledgement:** Assign the classification information you want to apply to a document after confirming the acknowledgement

9. **Task:** Define the task to give more detailed instructions to the responsible users

10. **Automatic Trigger:** Set up a process so that it automatically applies to the relevant documents once it has started

    a) **Status (which triggers a process):** Choose the status a document needs to have in ecoDMS to trigger an automatic process

    b) **Document Type (which triggers a process):** Choose the document type which a document also needs to have in ecoDMS to trigger an automatic process

---

> a) Once a document is classified in ecoDMS with the attributes (status and document type) you configure here, the process starts and the responsible users receive a task in the "Acknowledgements and Approvals" pane. "
>
> b) An "Eye" icon is automatically added to the respective documents once the system has detected a task (Table view: Next to DocID, Card view: Next to File type)
>
> c) **No Automatic Trigger:** If you do NOT select "Trigger automatically", you must trigger the process manually for your documents in ecoDMS (Feature in program header: "Acknowledgement and Approval")

---

11. Click "Save" to save or "Cancel" to abort the process.

    a) The process is saved to the "Acknowledgement & Approval" pane and can be started from here in the "Active" column
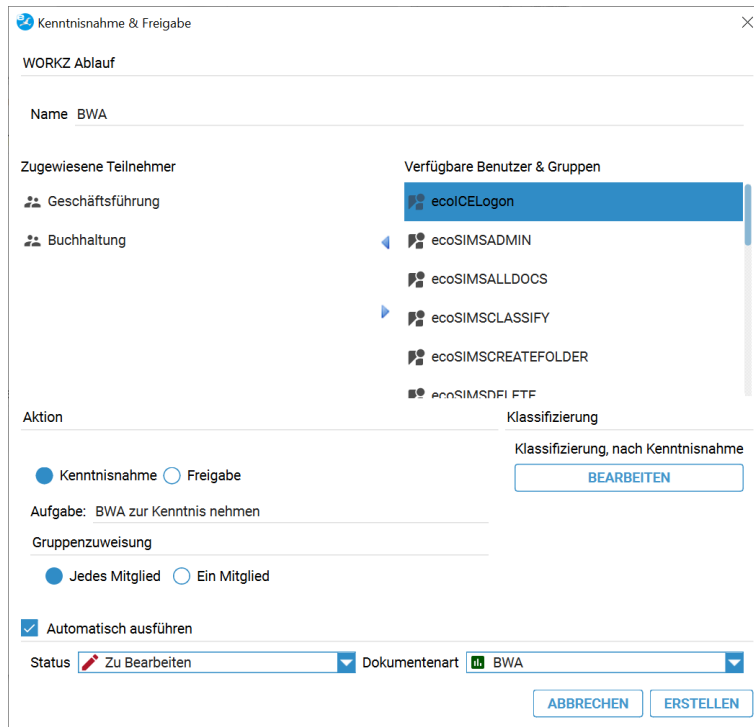
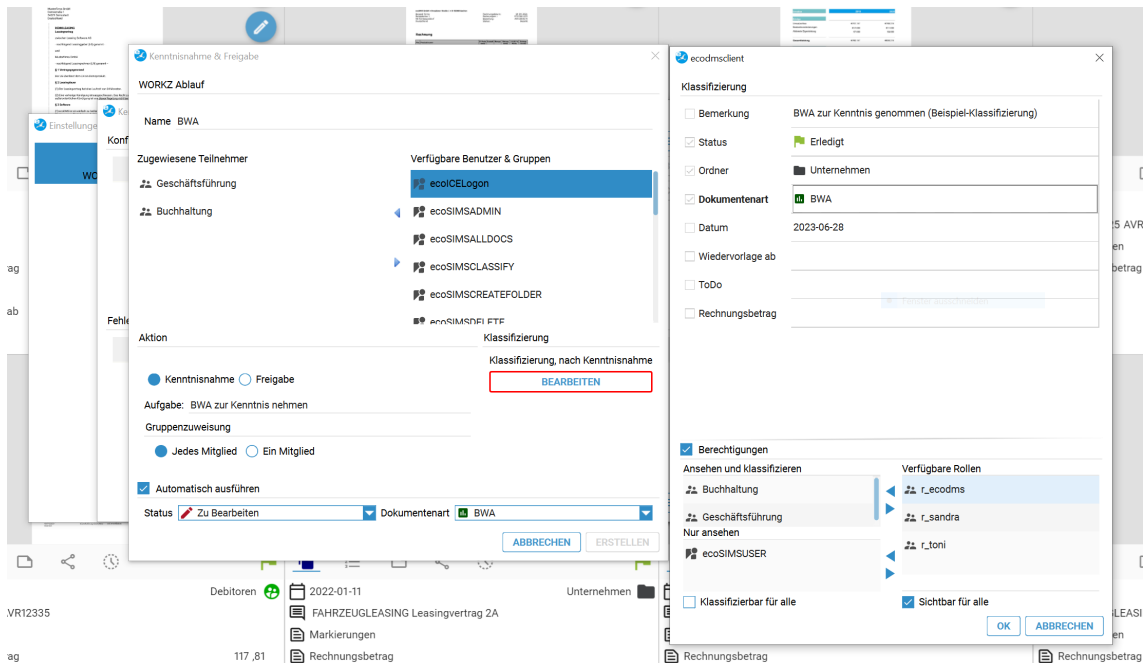Figure 36.19: WORKZ Add-on - Configure Acknowledgement - Example

Figure 36.20: WORKZ Add-on - Configure Acknowledgement - Classification Example
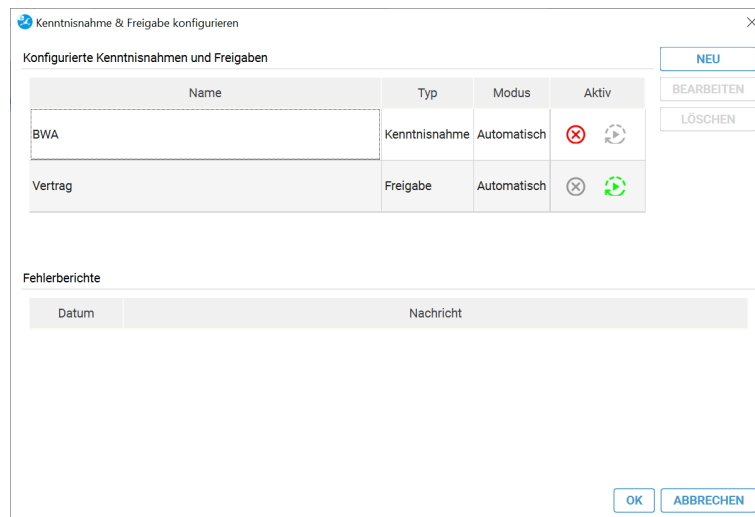
Figure 36.21: WORKZ Add-on - Overview of Configured Acknowledgements and Approvals

36.8.2 Acknowledge

To acknowledge a PDF, complete the following steps:

1. Click the "Acknowledgement" title in the "Acknowledgements and Approvals" pane

2. **Document:** For PDF files, ecoDMS displays a document preview.

3. **Task:** Process details display above the document

4. **Apply My Stamp:** If you are working with a versionable PDF file, you can apply a digital stamp. A digital stamp on the document identifies the process, the user, the type of response, and date and time.

5. To finalize and save the process, click "Acknowledge"

6. The add-on automatically applies the classification attributes you assigned to the process, as soon as the process has been completed by all responsible users

7. The entry automatically disappears from the list of your processes once it has been processed

8. The response is documented in the history

9. If you applied a stamp, ecoDMS creates a new version of this document
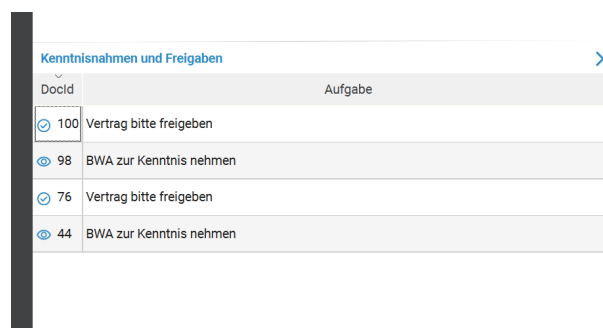
Figure 36.22: WORKZ Add-on - Task Overview in ecoDMS Client - Acknowledgements and Approvals

Figure 36.23: WORKZ Add-on - Acknowledge and Apply Stamp (Here: Versionable File)
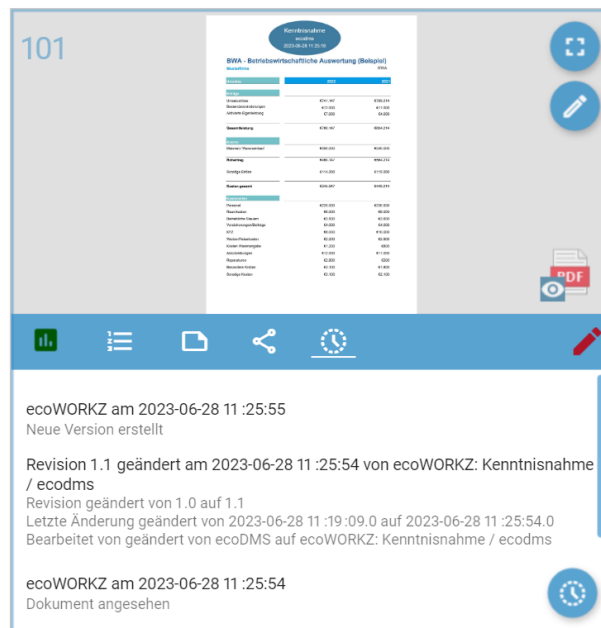

Figure 36.24: WORKZ Add-on - Acknowledgement History

36.8.3 Acknowledge Manually

Different processes require different measures. You may need to involve other users to work on an archived file that requires additional clarification or action. Therefore, all users with permission for the WORKZ add-on can start manual processes. Use the "Acknowledgement and Approval" feature in the ecoDMS header to start single processes.

- In the list box, choose from all processes you created in the Settings.
- If you edit existing processes here, the changes will not affect the original, saved processes. The edits will only apply to the manual process that you execute.

1. Select the documents in ecoDMS

2. Select the "Acknowledgement & Approval" feature in the ecoDMS header

3. The add-on displays the DocID of the selected documents

4. **ecoWORKZ Process:** The list box lists all available processes.
   a) Choose an existing process.
      i. The fields populate with the template settings, which you can modify for this manual process.
   b) You can also make individual settings instead of using a template
      i. Refer to the following chapters of this manual for more information on how to configure acknowledgements 36.8 and approvals 36.9.

5. **End of Process Email Notification for Initiator:** As a creator of the acknowledgement, you can receive an automatic email message from ecoDMS after the processes is complete. To do so, your email address must be available in your user profile (also refer to chapter 5.2) Enable this feature.

6. Click "Share via WORKZ" to save the process, or click "Cancel" to abort the process.
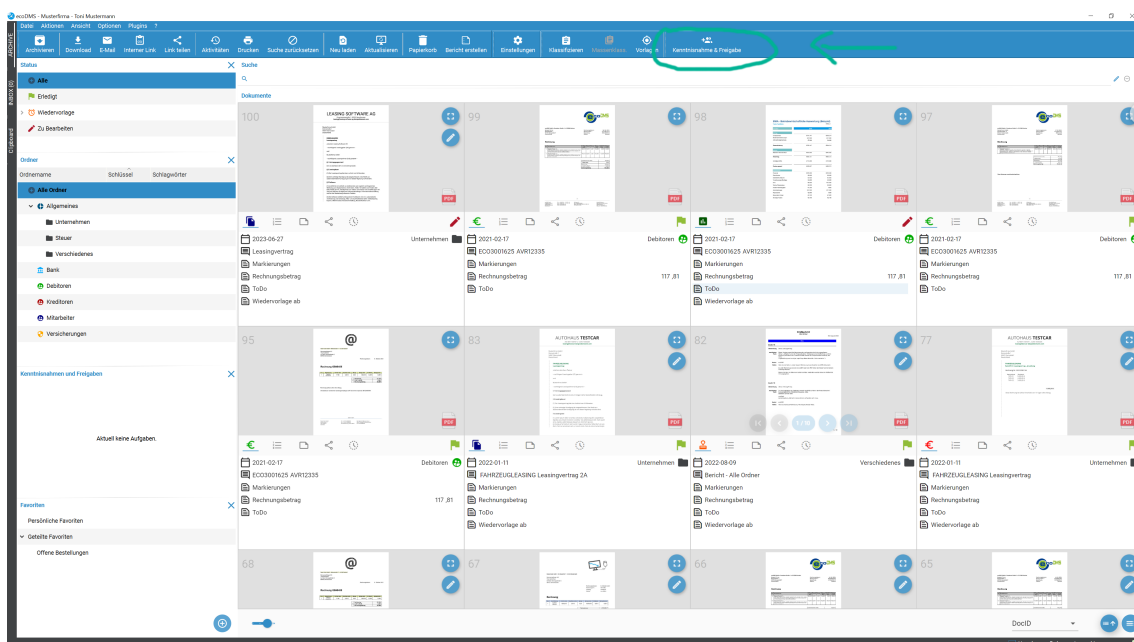   a) The Settings display to the respective users as available processes.

Figure 36.25: WORKZ Add-on - Trigger Manual Approval Process - Feature Button

Figure 36.26: WORKZ Add-on - Create Manual Acknowledgement Process

36.9 Approval

> Please note the following information for the ecoWORKZ version:
> - PDF files are only included when executing an acknowledgement or approval process is executed.
> - Once a process was started, it may take several minutes until the acknowledgements and approvals appear in the task list of the responsible user.
> - If multiple users or groups are involved in a process, acknowledgements and approvals appear in their task list as soon as the previous user or group has finished their task. The order of the assigned users is determined by the process settings.

Send business-relevant PDF files to the responsible staff members for approval via the WORKZ add-on. This is how you can digitalize and automate approval processes.

36.9.1 Configure Approval

To configure an approval, complete the following steps:

1. Open the ecoDMS Settings

2. Options -> Settings -> Tab: WORKZ Add-on

3. Click the "Acknowledgement & Approval" button.

4. Click "New"

5. **Name:** Enter a process name

6. **Assigned Participants:** Drag users and/or groups participating in the process from "Available Users & Groups" to the "Assigned Participants" pane.

    a) **Group Assignment:** If you select at least one user group or system permission, you have the following options:

        i. **One Member:** From all selected participants, 1 member must confirm the acknowledgement to finalize and end the process

ii. **All Members:** All selected participants must confirm the acknowledgement to finalize and end the process

7. **Action (Approval):** Select the "Approval" radio button.

8. **Classify If Not Approved:** Assign classification information you want to apply to the document following approval.

9. **Classify If Not Approved:** Assign classification information you want to apply to the document if the approval is rejected.

10. **Task:** Define the task to give more detailed instructions to the responsible users

11. **Automatic Trigger:** Set up a process so that it automatically applies to the relevant documents once it has started

    a) **Status (which triggers a process):** Choose the status a document needs to have in ecoDMS to trigger an automatic process

    b) **Document Type (which triggers a process):** Choose the document type which a document also needs to have in ecoDMS to trigger an automatic process

    a) Once a document is classified in ecoDMS with the attributes (status and document type) you configure here, the process starts and the responsible users receive a task in the "Acknowledgements and Approvals" pane.

    b) An "Eye" icon is automatically added to the respective documents once the system

    c) **No Automatic Trigger:** If you do NOT select the "Trigger automatically" feature, you must trigger the process manually for the documents you select in ecoDMS (feature only available in table view).

12. Click "Save" to save or "Cancel" to abort the process.

    a) The process is saved to the "Acknowledgement & Approval" pane and can be started from here in the "Active" column

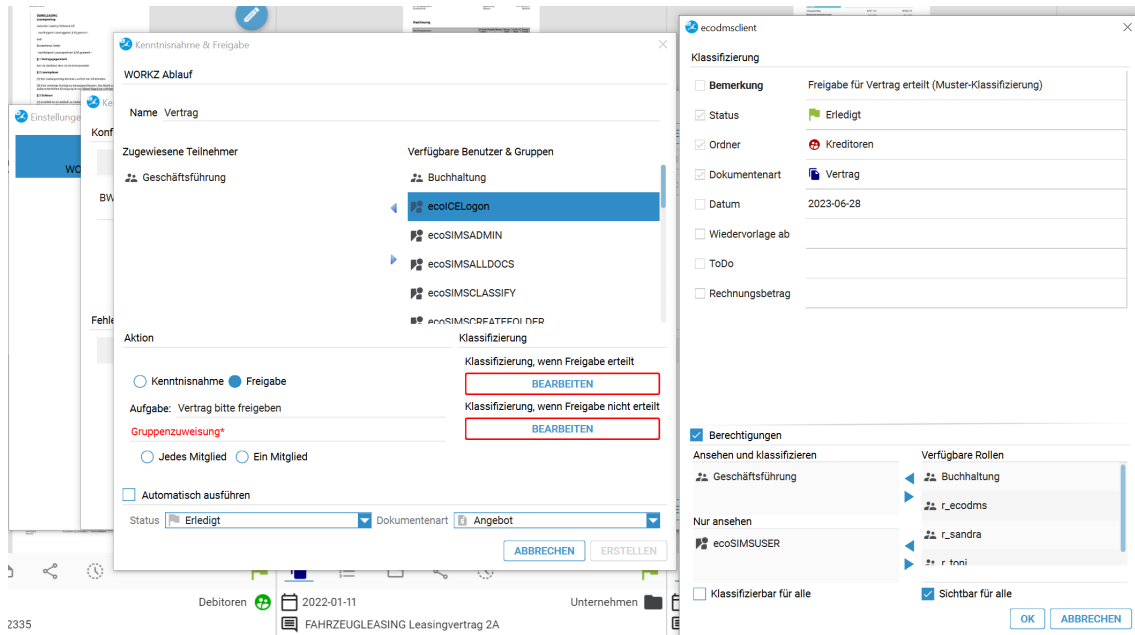Figure 36.27: WORKZ Add-on - Configure Approval - Example

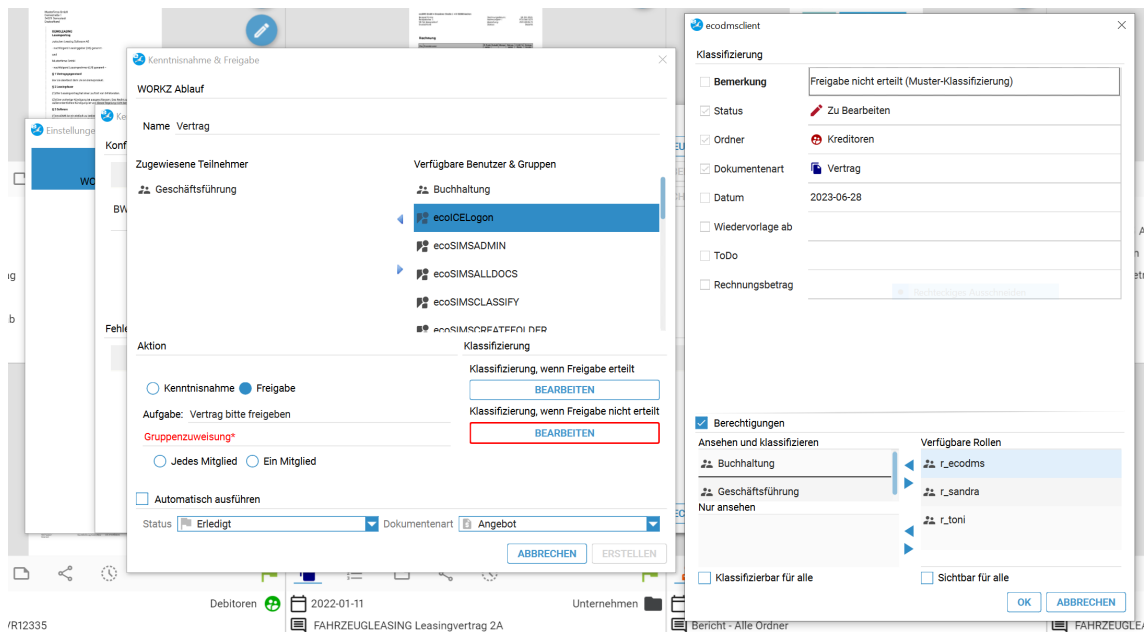Figure 36.28: WORKZ Add-on - Approved - Classification Example

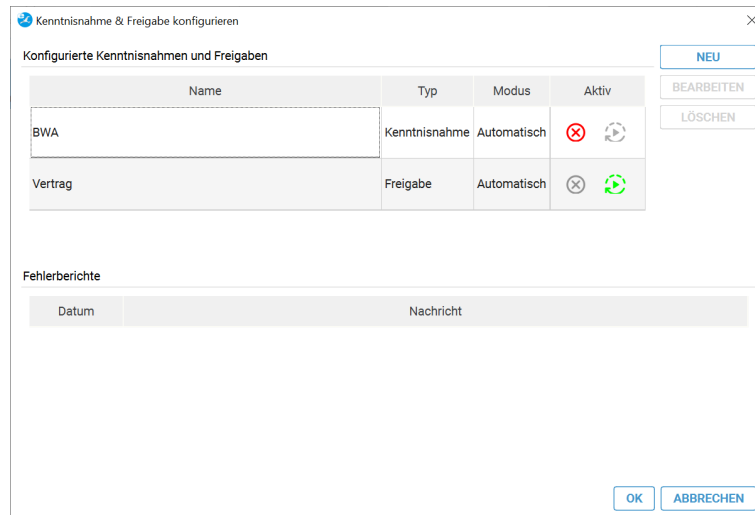Figure 36.29: WORKZ Add-on - Not Approved - Classification Example

Figure 36.30: WORKZ Add-on - Overview of Configured Acknowledgements and Approvals

36.9.2 Approve

To approve a document, complete the following steps:

1. The "Acknowledgement and Approval" pane displays all open tasks

2. Click the title of the "Approval".

3. **Document:** For PDF files, ecoDMS displays a document preview.

4. **Task:** Process details display above the document

   a) **Approve:** Click this radio button to approve the document

5. **Apply My Stamp:** If you are working with a versionable PDF file, you can apply a digital stamp. The stamp documents the response to the task, which user executed the process and when.

6. To finalize and save the process, click "Execute"

7. The add-on automatically applies the classification attributes you assigned to the process, as soon as the process has been completed by all responsible users

8. The entry automatically disappears from the list of your processes once it has been processed

9. The response is documented in the history

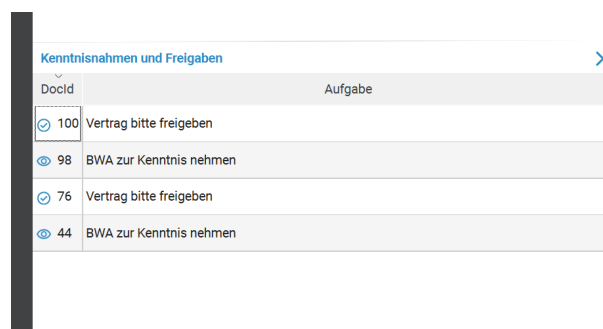10. If you applied a stamp, ecoDMS creates a new version of this document

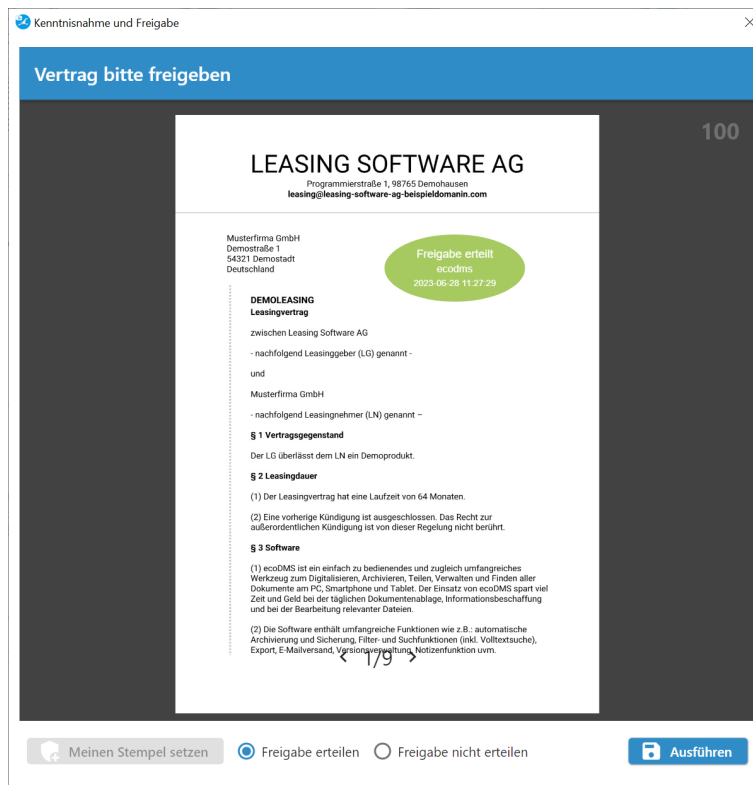Figure 36.31: WORKZ Add-on - Task Overview in ecoDMS Client - Acknowledgements and Approvals

Figure 36.32: WORKZ Add-on - Approve and Apply Stamp (Here: Versionable File)
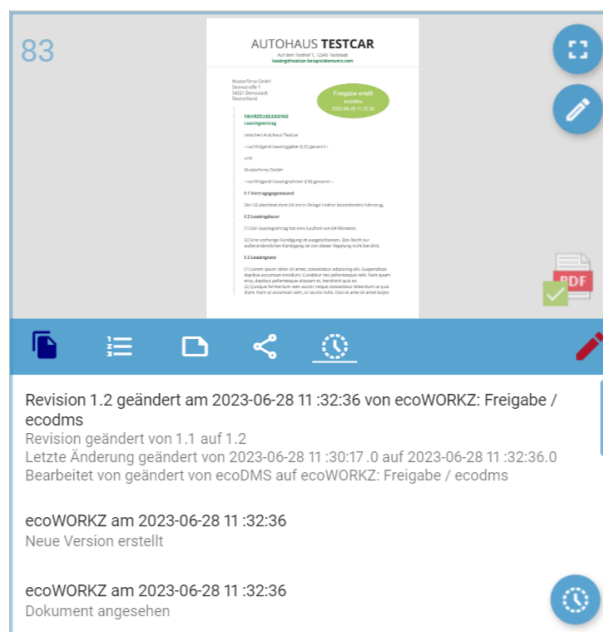

Figure 36.33: WORKZ Add-on - Approval History

36.9.3 Reject Approval

If you do not want to approve a document, complete the following steps:

1. The "Acknowledgement and Approval" pane displays all open tasks

2. Click the title of the "Approval".

3. **Document:** Für PDF-Dateien wird nun eine Dokumentenvorschau angezeigt

4. **Task:** Über dem Dokument werden Details zum Ablauf angezeigt

   a) **Reject Approval:** Click this radio button to reject the approval for this document

      i. Rejected because: If you do not approve a document, you must enter a reason. The reason is saved in the document history under "Processed by" when the process is finalized.

5. **Apply My Stamp:** If you are working with a versionable PDF file, you can apply a digital stamp. The stamp documents the response to the task, which user executed the process and when.

6. To finalize and save the process, click "Execute"

7. The add-on automatically applies the classification attributes you assigned to the process, as soon as the process has been completed by all responsible users

8. The entry automatically disappears from the list of your processes once it has been processed

9. The response is documented in the history

10. If you applied a stamp, ecoDMS creates a new version of this document

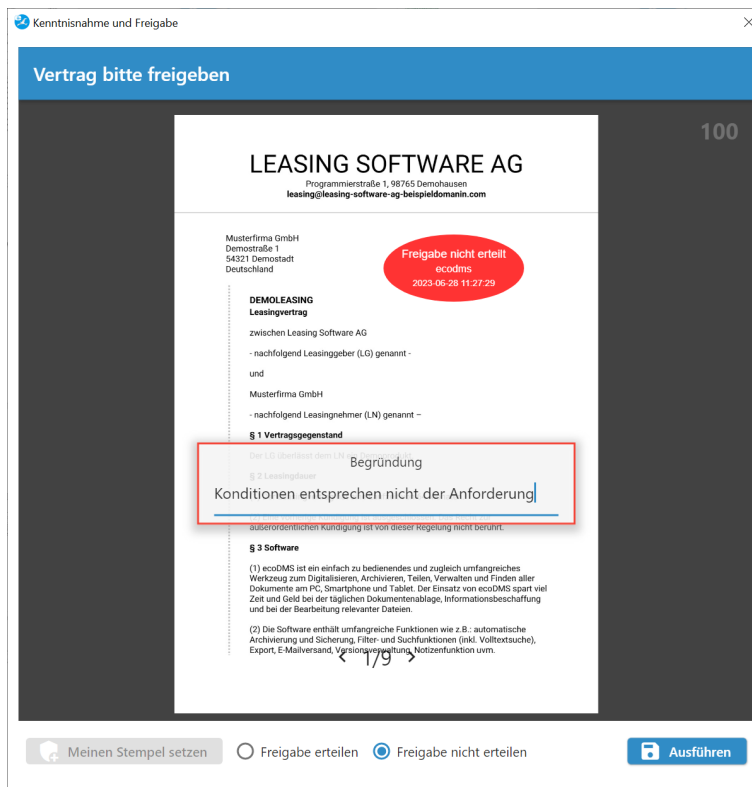Figure 36.34: WORKZ Add-on - Task Overview in ecoDMS Client - Acknowledgements and Approvals

Figure 36.35: WORKZ Add-on - Reject Approval with Reason and Stamp (Here: Versionable File)
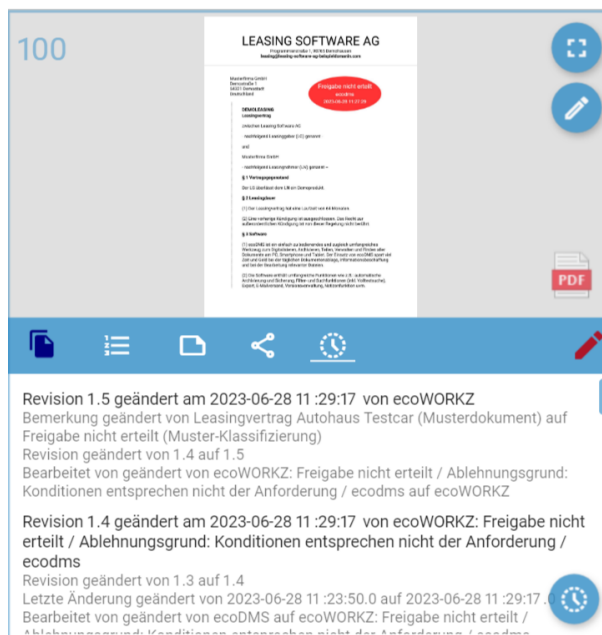

Figure 36.36: WORKZ Add-on - Rejected Approval History

36.9.4 Create Manual Approval

Different processes require different measures. You may need to involve other users to work on an archived file that requires additional clarification or action. Therefore, all users with permission for the WORKZ add-on can start manual processes. Use the "Acknowledgement and Approval" feature in the ecoDMS header to start single processes.

– In the list box, choose from all processes you created in the Settings.
– If you edit existing processes here, the changes will not affect the original, saved processes. The edits will only apply to the manual process that you execute.

1. Select the documents in ecoDMS

2. Select the "Acknowledgement & Approval" feature in the ecoDMS header

3. The add-on displays the DocID of the selected documents

4. **ecoWORKZ Process:** The list box lists all available processes.
   a) Choose an existing process.
      i. The fields populate with the template settings, which you can modify for this manual process.
   b) You can also make individual settings instead of using a template
      i. Refer to the following chapters of this manual for more information on how to configure acknowledgements 36.8 and approvals 36.9.

5. **End of Process Email Notification for Initiator:** As a creator of the acknowledgement, you can receive an automatic email message from ecoDMS after the processes is complete. To do so, your email address must be available in your user profile (also refer to chapter 5.2) Enable this feature.

6. Click "Share via WORKZ" to save the process, or click "Cancel" to abort the process.
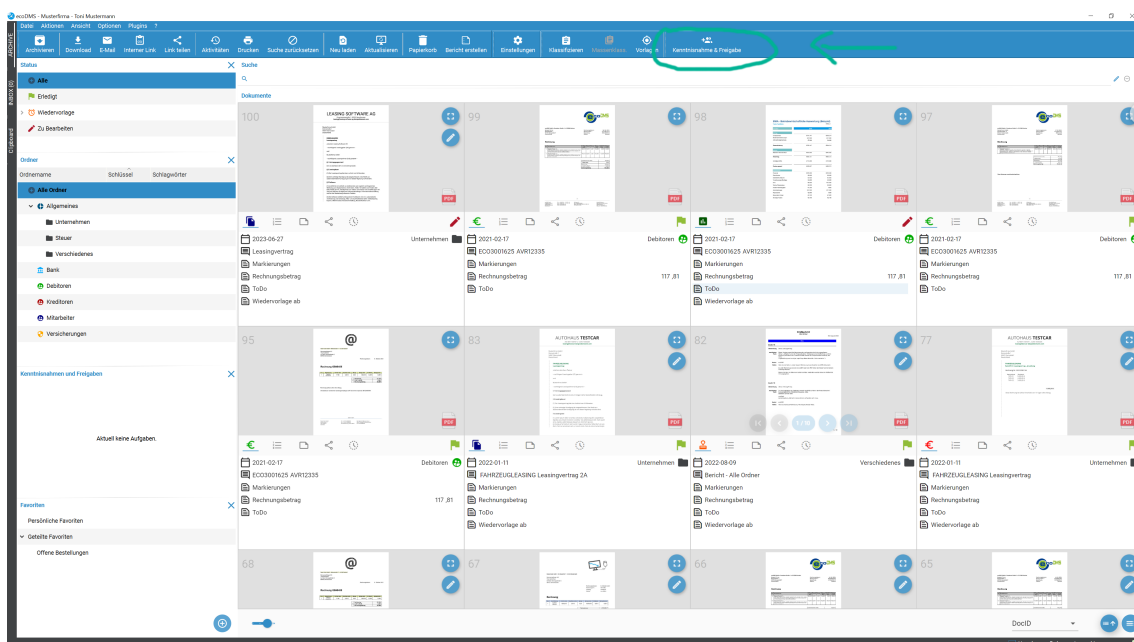   a) The Settings display to the respective users as available processes.

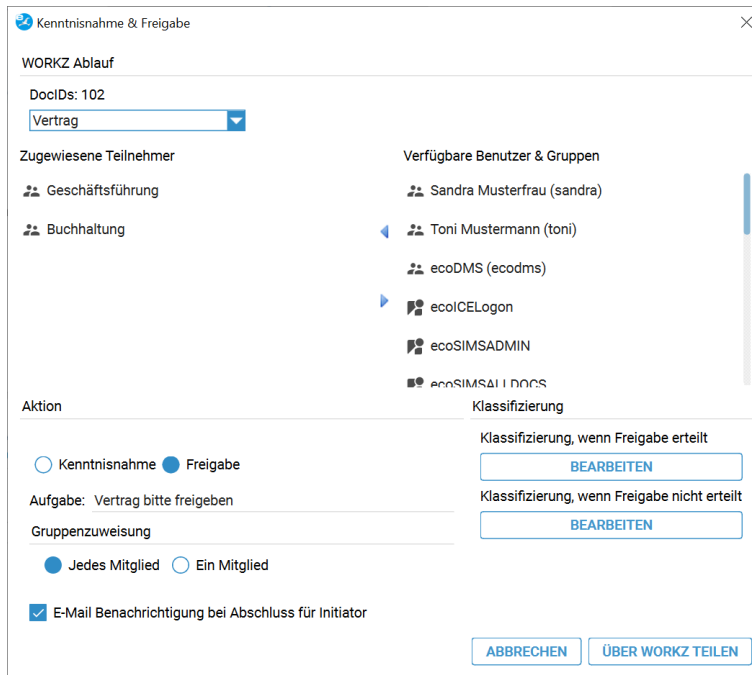Figure 36.37: WORKZ Add-on - Trigger Manual Approval Process - Feature Button

Figure 36.38: WORKZ Add-on - Create Manual Approval Process

36.10 Digital Stamp

- You can apply a stamp when approving or acknowledging a document.
- The document to be processed must be a PDF file which is approved for version management in ecoDMS.
- The PDF document must not be finalized in the ecoDMS version control.
- You must be able to add new versions.

You can use a digital stamp on a versionable document

- to document the response to the task (acknowledged, approved, not approved)
- and which user executed the process
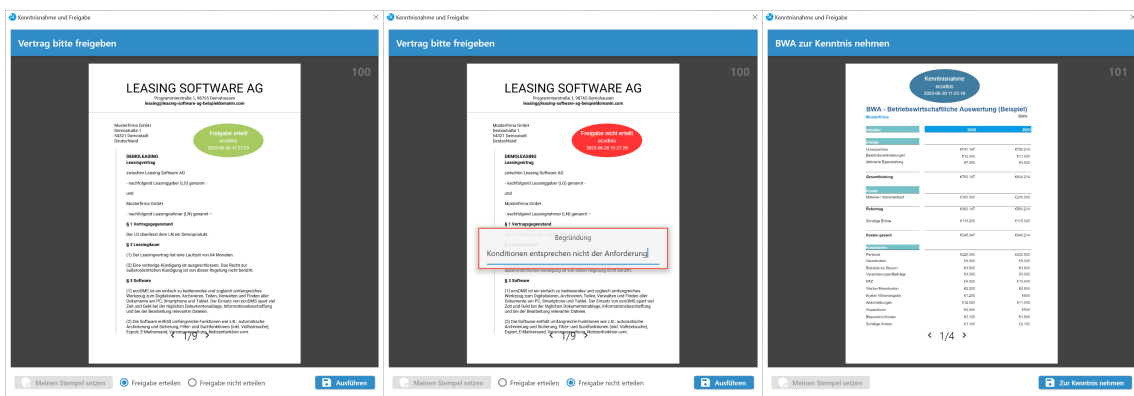- and when (date + time).

Figure 36.39: Stamp for Approvals and Acknowledgements

37 Login Credentials

This chapter contains information about the initial login credentials for ecoDMS.

37.1 Default User

The default user is created automatically when you first install ecoDMS. This user is allowed to...

- administer the system.
- archive and classify documents.
- use version control.
- use the inbox.
- view document activities.
- create new folders.
- use the web interface.
- use template management.
- erase documents.

The login credentials for the default user (if the password has not been changed) are:
- User name: ecodms
- Password: ecodms

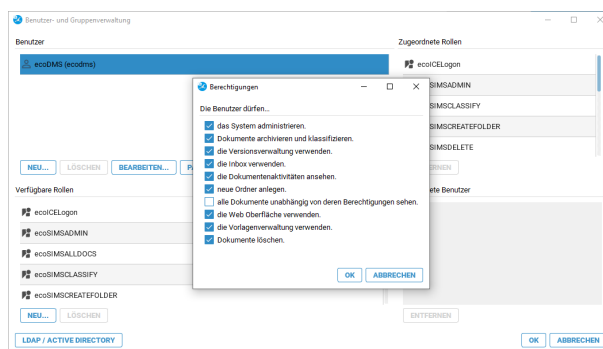For security reasons, this password should be changed immediately after login.

Figure 37.1: Permissions Default User

37.2 System Administrator

Besides the automatically generated user (default user) there is also a system administrator. This user is for system configuration only. The system administrator thus has the permission to make system settings and add more users. This user is not able to archive, view and/or classify documents.

> – User name: ecoSIMSAdmin
> – Password: ecoSIMSAdmin
>
> For security reasons, this password should be changed immediately after login.

37.3 PostgreSQL Database

If the database was installed manually, the login credentials that was assigned during the installation of postgreSQL applies.

37.4 Scaninput Folder (Linux Distributions)

The scaninput folder is a Samba share. When installing ecoDMS Server on a Linux distribution, a default user is created to do so. As an option, you can also enter any other user created in the Linux system. Use the following login credentials for the default user:

> – User name: dmsscanner
> – Password: dmsscanner