



ecoDMS Build 24.01

WEB CLIENT

Imprint

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1 Manage Web Service / Web Client

Use the web client to access ecoDMS through an internet browser from your computer, laptop, smart phone and tablet from any platform and wherever you are. Your responsible ecoDMS administrator can enable the web functions in the ecoDMS Settings. You can access the web client from an internal network and through remote access.

- The web service, including web client, requires a license for the full version of ecoDMS but you can also test it in the trial version. This function is not enabled in the Free4Three version.
- By default, web access is configured to allow access through the web client in your own network (internal).
- If you have a new installation of ecoDMS Server, the internal web service is already started.
- You can also enable remote access from mobile networks or from other networks, for example, in the ecoDMS Settings.
- If this is an update/upgrade, the existing system and user settings are applied and the administrator may need to start the web service manually.
- The web client requires a license for each concurrent login. If you, for example, want to use the web client and ecoDMS Client at the same time, you require 2 licenses.
- To be able to work with the web client, your users needs the corresponding system permissions.
- You can use the web client in English and German language.
 - The language depends on the language specified in your browser.
 - Please refer to the browser manual of your browser for more information on language settings.

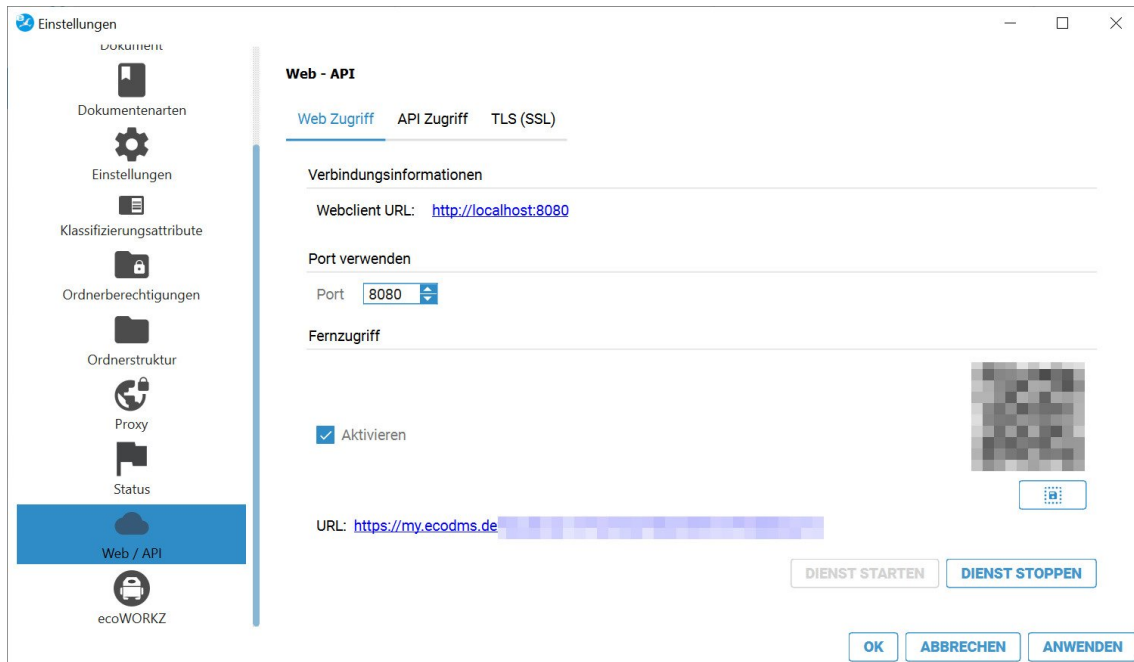


Figure 1.1: Settings - Web Access with Enabled Remote Access

1.1 Start Service

To start the web service, complete the following steps:

1. Open the Settings dialogue in ecoDMS Client as an administrator
2. Click "Web / API -> Web Access"
3. **Use Port:** The default setting for the port is "8080". Change the port if necessary.
4. **Remote Access:** Click "Enable" to allow remote access
 - a) **URL:** ecoDMS displays the link you need to access the web client from outside your company network (remote access)
 - b) **Barcode:** The barcode contains the link to access the web client from outside your company network (remote access)
 - i. Use a barcode scanner to open the web client from a smart phone or tablet

- If you want to access the web client from outside, you need to make the system accessible from outside. To do so, enable remote access in ecoDMS.
- If you want to enable remote access later, you must stop the web service first. Once you have stopped the web service, you can also enable the "Remote Access" function.

5. **Start Service:** Click "Start service" to start web access with your settings

- a) Web access is enabled. This process may take a while.
6. **Web Client URL:** ecoDMS displays the link you need to access the web client from your company network (internal access)
7. Click "Apply" to save or "Cancel" to abort the process.

1.2 Stop Service

To stop the web service, complete the following steps:

1. Open the Settings dialogue in ecoDMS Client as an administrator
2. Web / API -> Web Access -> Stop Service
 - a) Web access is stopped. This process may take a while.
3. Connection Information -> Web Client URL: The link to the web client is not available
4. Click "Apply" to save or "Cancel" to abort the process.

2 Login and Logoff

If you have the system authorisation "ecoSIMSWEBCLIENT", you can log in to the web client url.

2.1 Login

Copy and paste the web client URL from the ecoDMS Settings dialogue into your web browser. For internal access, open the Login page from the following link:

```
http://ecoDMS_IP_ADRESSE:Port
```

1. Enter your regular ecoDMS user data in the login window.
 - a) **Username:** Enter your username
 - b) **Password:** Enter the password associated with the username
 - c) **Login:** Click the Login button to start ecoDMS Web Client

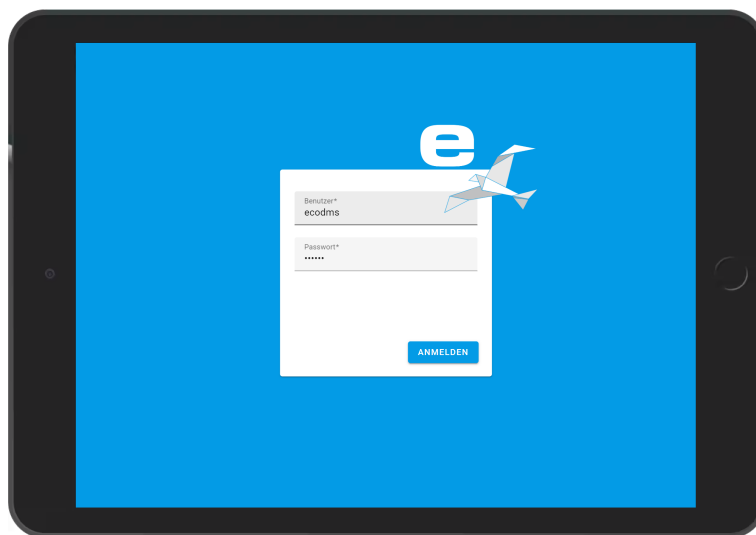


Figure 2.1: Web Client: Login (Here: Tablet)

2.2 Logoff

To exit the web client and log off your user, complete the following steps:

1. Click the User icon at the top right of the web client

2. Select "Logoff"
3. Your user is now logged off and you will return to the ecoDMS Web Client login page.

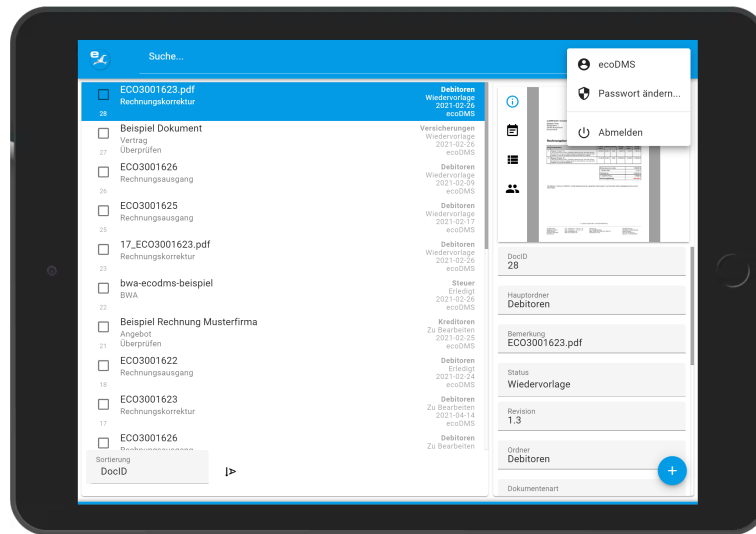


Figure 2.2: Web Client: Logoff (Here: Tablet)

2.3 Mobile Desktop Link (Mobile)

If you want to open the web client from the start screen of your smart phone or tablet, you can create a link. The following examples shows how to create a web client link.

2.3.1 Android via Chrome

1. Enter the web client URL in your web browser on your smart phone or tablet
2. Click the "More Options" menu at the top right of your browser
3. Select "Add to Start Screen"
4. Confirm with "Add"
5. On the start screen of your Android device, you now have a shortcut to the ecoDMS Web client

2.3.2 iOS via Safari

1. Enter the web client URL in your web browser on your smart phone or tablet
2. In your browser, tap the "Share" icon next to the address bar
3. Then select "Return to Home Screen"
4. Confirm with "Add"
5. On the start screen of your iOS device, you now have a shortcut to ecoDMS Web

3 Archiving Documents

- For archiving, the same permissions and access conditions apply for both web client and ecoDMS Client
- In the ecoDMS manual, you will find specific details on how to set up the system, assign permissions, etc

You can use the web client to archive documents in ecoDMS. You can either archive using drag and drop (e.g. on a computer or laptop) or by clicking "Archive" in the web client (e.g. on a smart phone, tablet).

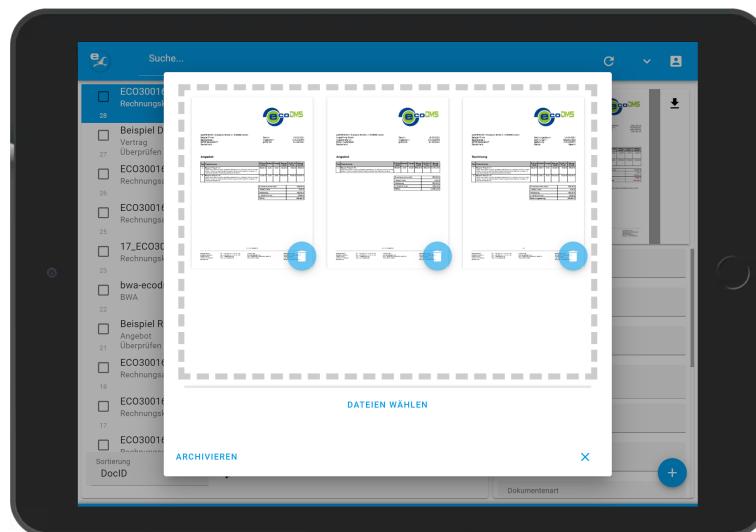


Figure 3.1: Archive Documents in the Web Client (Here: Tablet)

3.1 Computer / Laptop

On your computer or laptop, drag and drop is the most convenient way for moving one or more documents straight into the ecoDMS Web client.

1. Select one or more documents that you want to archive (e.g. on the desktop or in the file system of your computer)
2. Drag the files straight into the web client
 - a) A dialogue opens into which you can drag and drop your documents

- The documents are displayed consecutively in the dialogue
- ecoDMS displays the document preview if available
- Click the Trash icon to remove a file before archiving

3. Click "Archive" to load the documents to ecoDMS for final archiving

Please refer to the chapter "Classification" in this manual for more information on how to assign documents

3.2 Smart Phone / Tablet

On your smart phone and tablet, the recommended way for archiving is to click the plus icon to archive one or more documents in ecoDMS.

1. In the bottom right of the web client, click the Plus icon
2. A dialogue opens where you can insert the documents
3. **Select Files:** Click this button to access your file system. Select the documents.

- The documents are displayed consecutively in the dialogue
- ecoDMS displays the document preview if available
- Click the Trash icon to remove a file before archiving

4. Click "Archive" to load the documents to ecoDMS for final archiving

Please refer to the chapter "Classification" in this manual for more information on how to assign documents

4 Actions and View

The web client provides many ecoDMS actions / features.

1. You can access the essential actions by selecting a document in the table view of the web client.

When you select a document, the web client displays another area with the following features

- Document Preview
- Download
- Classification
- Notes
- Versions
- Document Permissions

4.1 View Document (Preview)

- The preview only displays PDFs.
- Depending on file size and volume, it may take a while for the documents to display.

4.1.1 Zoom

In the Preview pane you can zoom the displayed document.

1. Scroll to zoom into or out of the document with your mouse.
 - a) Alternatively, you can also use the Magnifying Glass icons in the preview pane.



Figure 4.1: Icons - Zoom Preview

4.1.2 Copyfit

Copyfit the zoomed content by clicking the House icon.

4.1.3 Scroll

Scroll through multi-page documents with the Arrow icons.

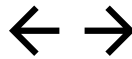


Figure 4.2: Icons - Scroll Preview

4.1.4 Full Screen

To display the document in the preview pane in full-screen mode, complete the following steps:

1. Click the Full Screen icon in the preview pane.
2. ecoDMS displays the PDF in the full screen mode.



Figure 4.3: Icon - Full Screen Preview

4.2 Download Document

Download the archived documents from the ecoDMS Web client and open them.

1. Select a document
2. Click the "Classify" icon in the preview pane
3. Click the Download icon next to the preview pane (arrow points downwards)

4.3 Classify Document

- The preview is displayed for PDF documents and files which are archived with the ecoDMS plugins or the PDF/A printer
- For classification, the same permissions and access conditions apply in the web client as in ecoDMS Client
- For more details about classification attributes and their assignment, refer to the ecoDMS manual

Use classification to specify the virtual target folder in ecoDMS, the document type, status, responsibilities and much more archiving information for each file. By assigning these details, the documents can be stored systematically with many details, which ensures they can be located without necessarily requiring a full-text search.

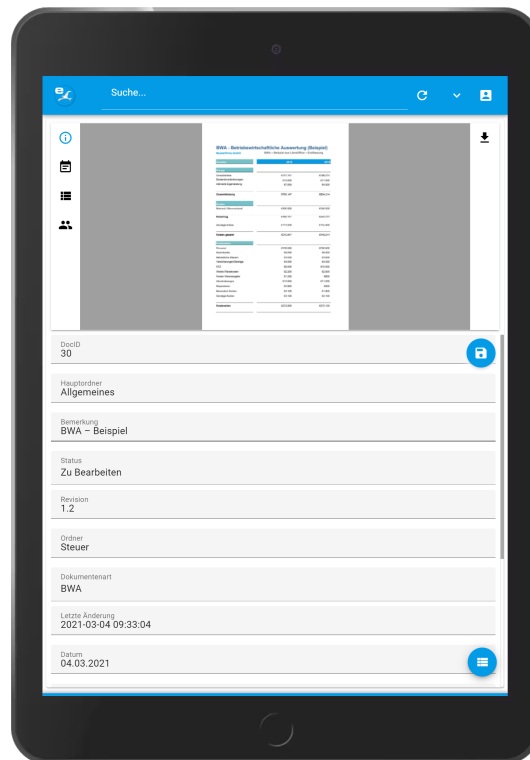


Figure 4.4: Classify Documents in the Web Client (Here: Tablet)

1. Select a document
2. Click the "Classify" icon in the preview pane.
3. Specify the classification attributes for the document,
 - a) for example, select folder, document type and status
4. Click "Save" to save the classification
 - a) You can only see the icon if you have modified the classification

4.4 Create Notes

- All users with access to the document in ecoDMS can edit, add to and delete the 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 famous yellow sticky notes.

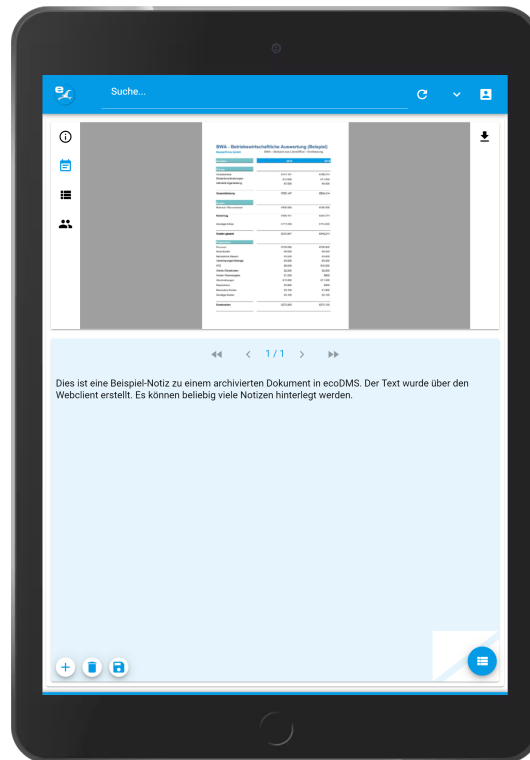


Figure 4.5: Create Notes in the Web Client (Here: Tablet)

4.4.1 Write New Note

To write a note, complete the following steps:

1. Select a document
2. In the preview pane, click the "Notes" icon
3. Click the plus icon "New Note"
4. Enter a text
5. Click "Save" to save your entry

4.4.2 Edit Note

To edit a note, complete the following steps:

1. Select a document
2. In the preview pane, click the "Notes" icon
3. If there are several notes, select a note using the arrow keys
4. Click the note to edit it
5. Click "Save" to save your entry
 - a) You can only see the icon if you have modified your note

4.4.3 Delete Note

To delete a note, complete the following steps:

1. Select a document
2. In the preview pane, click the "Notes" icon
3. If there are several notes, select a note using the arrow keys
4. Click the trash icon "Delete Note"
5. The note is immediately and irrevocably deleted
 - a) You cannot undo this operation

4.5 Document Versioning

- For version control, the same permissions and access conditions apply for both web client and ecoDMS Client
- For more details on version control, please refer to the ecoDMS manual

ecoDMS allows you to archive any number of document versions. This means that the original persists. You can add new versions and download existing versions via the web client.

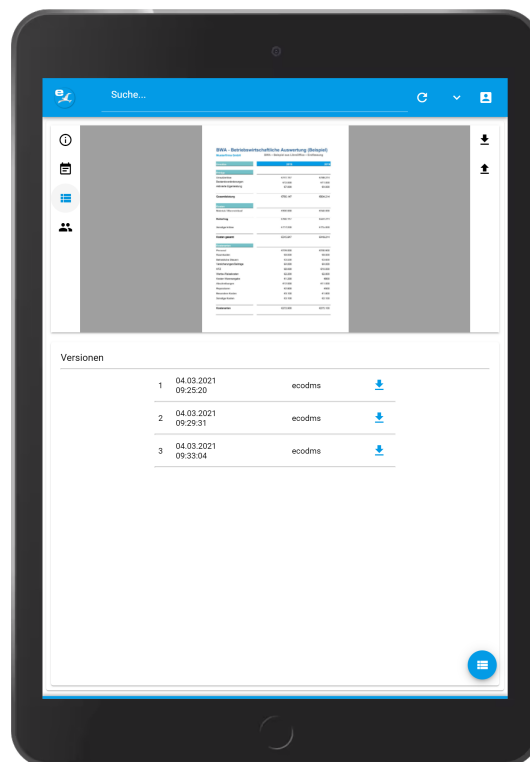


Figure 4.6: Document Versions in the Web Client (Here: Tablet)

4.5.1 Add New Version

To add a new document version, complete the following steps:

1. Select a document
2. In the preview pane, click the "Versions" icon
3. Click the upload icon next to the preview pane (upward arrow) "Add New Version"
4. A dialogue opens where you can
 - a) drag and drop the new version
 - b) or select the new version by clicking the "Select File" button

- ecoDMS displays the document preview if available
- Click the Trash icon to remove a file before archiving

5. Click "Add version" to archive the document as a new version in ecoDMS

4.5.2 Download 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. In the preview pane, click the "Versions" icon
3. You can now download each version individually
4. If there is an original version with an associated PDF, you can access both files
 - a) Download PDF: Click the Download icon next to the preview pane (arrow points downwards)
 - b) Download original file: Click the Download icon next to the version (arrow points downwards)

4.6 Permissions

- When you assign permissions (analogous to the classification), the same permissions and access conditions apply in both web client and ecoDMS Client
- For more details about permissions and their assignment, refer to the ecoDMS manual

To ensure that the documents can only be viewed and edited by authorised persons, ecoDMS offers the assignment of separate access permissions for each document. This protects the privacy of documents.

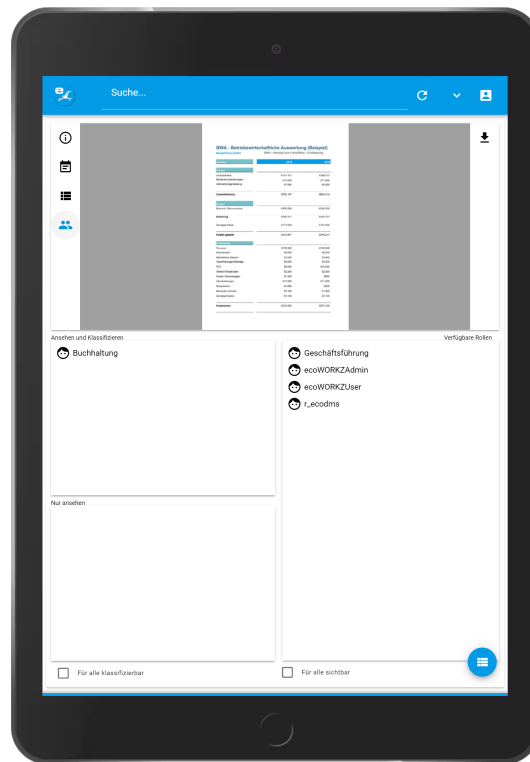


Figure 4.7: Document Permissions in the Web Client (Here: Tablet)

1. Select a document
2. In the preview pane, click the "Permissions" icon

- You assign permissions with drag and 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.

3. Click "Save" to save your entry
 - a) You can only see the icon if you have modified a permission

5 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.

- When searching for documents, the same conditions apply for both web client and ecoDMS Client.
- For more specific details about the search functions, refer to the ecoDMS manual.

5.1 Full-Text Search

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. The following common search methods are available in the web client for the full-text search. Here are a few examples on how to use the full-text search.

1. Simple full-text search

```
Invoice example company
```

2. Wildcard search

```
Me?er
```

```
Test*
```

3. Fuzzy search

```
Meier~
```

4. Boolean operators

```
Sample OR Demo
```

```
Sample AND Demo
```

```
Sample NOT Demo
```

5.2 Advanced Search

- When searching for documents, the same conditions apply for both web client and ecoDMS Client
- For more specific details about the search functions, refer to the ecoDMS manual
- To delete a search criterion, click the X next to the respective value in the search line

The Advanced Search allows you to use a variety of values for your search query in ecoDMS. You can use available classification attributes and the full-text search.

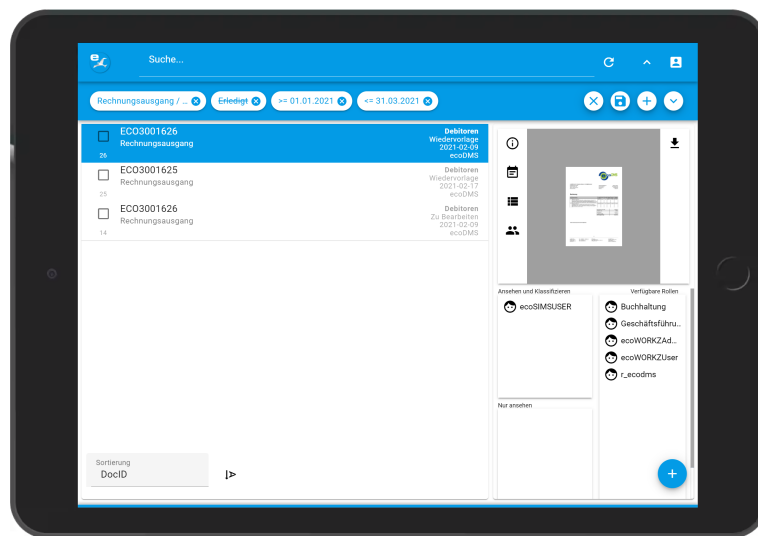


Figure 5.1: Advanced Search of Documents in the Web Client (Here: Tablet)

1. Click the Expand icon to the right of the search box (arrow pointing downwards) to expand the advanced search area
2. Use the Plus icon to select the search criteria
 - a) Displays all searchable attributes and values you can select. Select an entry from the list
 - b) 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 than / equal
 - iv. greater than
 - v. is
 - vi. is not
 - vii. smaller / equal

- viii. smaller than
 - c) Define the search criterion more precisely here
 - i. Choose from the values belonging to the "field" (e.g. the folder structure or a list of all document types)
 - ii. ecoDMS allows you to select several values as search criteria - depending on the attribute - and combines them with an OR operator in the search query
 - d) Confirm your selection with "OK" or abort the process with "Cancel"
3. To add more search criteria, repeat the steps
 4. The search starts automatically
 - a) Click the X icon to the right of the search box to end the search

5.3 Favorites

- You can only create personal favorites in the web client.
- The responsible administrator can create shared favorites in ecoDMS Client.
- If shared favorites are available, you can also select them in the web client.

You can save recurring search queries as favorites.

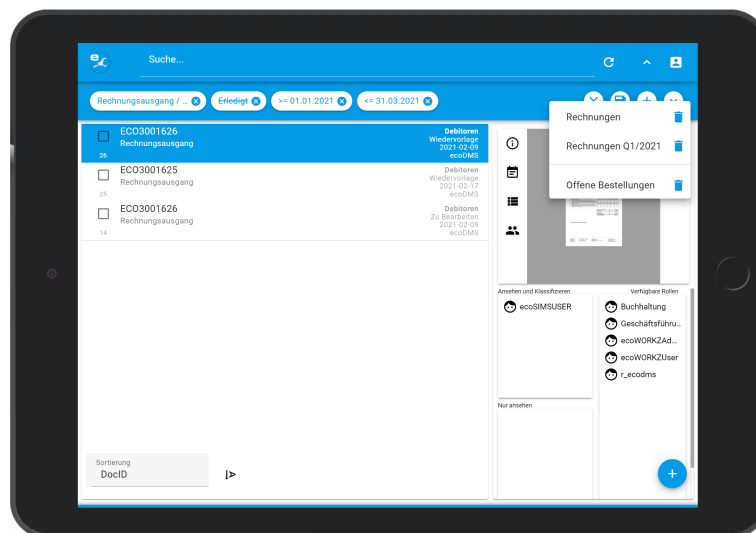


Figure 5.2: Document Search via Saved Favorite in the Web Client (Here: Tablet)

5.3.1 Search with Favorite

To enable a favorite search query, complete the following steps:

1. Click the Expand icon to the right of the search box (arrow pointing downwards) to expand the advanced search area

2. Another Expand icon (arrow pointing downwards) displays in the right area
 - a) Any favorites are displayed here
3. Select a favorite to start your search
 - a) Click the "X" icon to exit the search

5.3.2 Save Favorite

To save a search as favorite, complete the following steps:

1. Click the Expand icon to the right of the search box (arrow pointing downwards) to expand the advanced search area
2. Assign the appropriate search criteria
3. Click the Save icon in the right corner of the search area
4. Assign a name for the favorite
5. Finished

5.3.3 Delete Favorite

To irrevocably delete a favorite, complete the following steps:

1. Click the Expand icon to the right of the search box (arrow pointing downwards) to expand the advanced search area
2. Another Expand icon (arrow pointing downwards) displays in the right area
 - a) Any favorites are displayed here
3. Click the trash icon "Delete Favorite" for the favorite you want to delete
4. Confirm the "Delete Favorite" message box with "Yes" or abort the process with "No"

6 Inbox

- For the inbox, the same conditions apply in both web client and ecoDMS Client
- For more specific details about the scan process, refer to the ecoDMS manual
- The inbox in the web client receives the scanned documents from the scaninput folder
- In addition, you can load PDF documents manually with the upload function

After scanning, the scanned documents are usually retrieved through the inbox and prepared for archiving. This is the pre-stage of ecoDMS.

6.1 Start Inbox

Launch the inbox from the slide-out drawer in the web client. The drawer opens when you click the ecoDMS logo at the top left. If there are already documents in the inbox, the number of available files is displayed next to the Inbox icon.

1. Slide out the drawer by clicking the ecoDMS logo in the top left corner
2. Click the Inbox icon in the Drawer to start the inbox

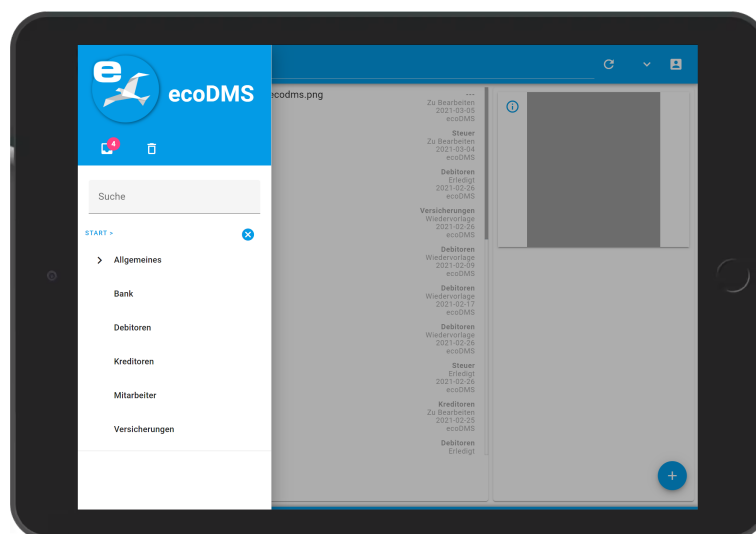


Figure 6.1: Drawer with Link to Inbox in the Web Client (Here: Tablet)

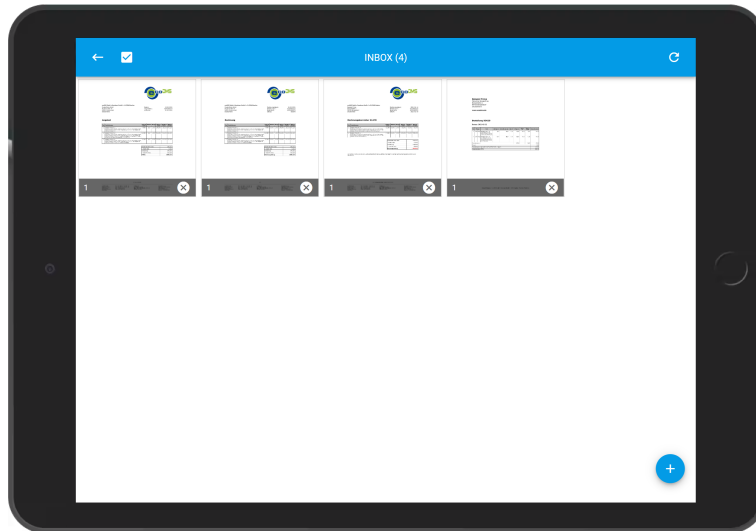


Figure 6.2: Inbox Start Window with Document Overview (Here: Tablet)

6.2 Upload Documents

In addition to scanning via scaninput folder, you can manually upload PDF files to the inbox. To do so, use the upload function in the web client in the lower right corner of the inbox.

1. Launch the inbox in the ecoDMS Web client
2. In the bottom right of the web client, click the Plus icon
3. A dialogue opens where you can insert the documents
4. **Select Files:** Click this button to access your file system. Select the documents.

- The documents are displayed consecutively in the dialogue
- ecoDMS displays the document preview if available
- Click the Trash icon to remove a file before archiving

5. Click "Archive" to load the documents to ecoDMS for final archiving

Please refer to the chapter "Classification" in this manual for more information on how to assign documents

6.3 Classify and Archive Document

- A file from the inbox is archived immediately after you click the Save button in the classification dialogue
- For classification in the inbox, the same permissions and access conditions apply in the web client as in ecoDMS Client
- For more details about classification attributes and their assignment, refer to the ecoDMS manual

Use classification to specify the virtual target folder in ecoDMS, the document type, status, responsibilities and much more archiving information for each file. By assigning these details, the documents can be stored systematically with many details, which ensures they can be located without necessarily requiring a full-text search.

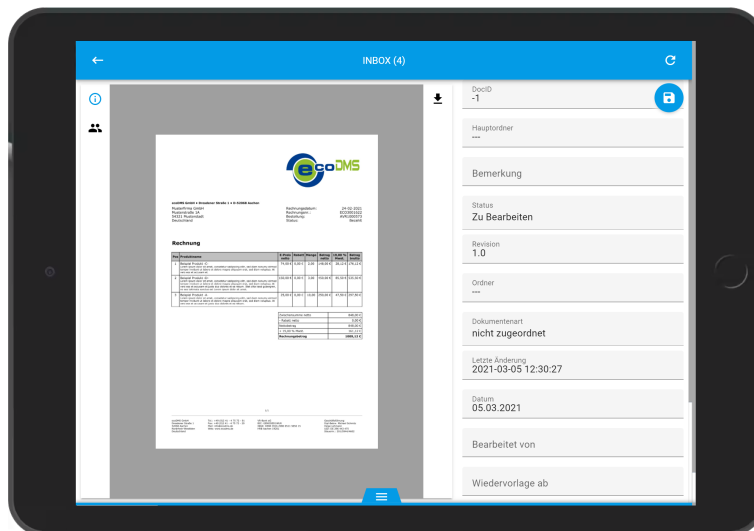


Figure 6.3: Classify Scanned Documents in the Inbox of the Web Client (Here: Tablet)

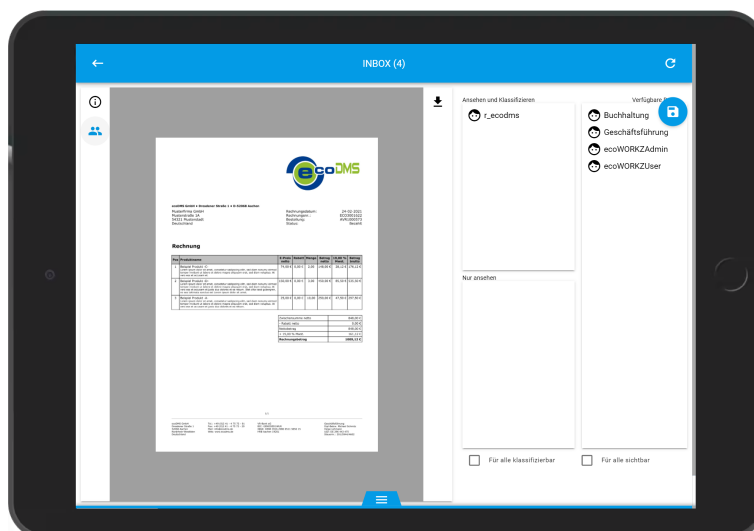


Figure 6.4: Assign Permissions for Scanned Documents in the Inbox from the Web Client (Here: Tablet)

1. Start the inbox in the web client
2. Select a file in the overview of available inbox documents
3. Specify the classification attributes for the document,
 - a) for example, select folder, document type and status
4. Click the "Permissions" icon to the left of the preview

- To ensure that the documents can only be viewed and edited by authorised persons, ecoDMS offers the assignment of separate access permissions for each document. This protects the privacy of documents.
- You assign permissions with drag and 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.

5. Archive the classified file in ecoDMS by clicking the Save icon

7 Delete Documents

- For the trash, the same conditions apply in both web client and ecoDMS Client.
- For more specific details about deleting documents, refer to the ecoDMS manual.
- Search functions are also available in the trash.
- Classification is not possible in the trash.
- In the web client you have limited access to the ecoDMS delete functions.
- You can only irrevocably delete documents in ecoDMS Client.

The web client has restricted access to the ecoDMS trash.

7.1 Open and Close Trash

Launch the trash from the slide-out drawer in the web client. The drawer opens when you click the ecoDMS logo at the top left. If the trash view has already been launched, the trash icon is coloured red.

1. Slide out the drawer by clicking the ecoDMS logo in the top left corner
2. 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
3. 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

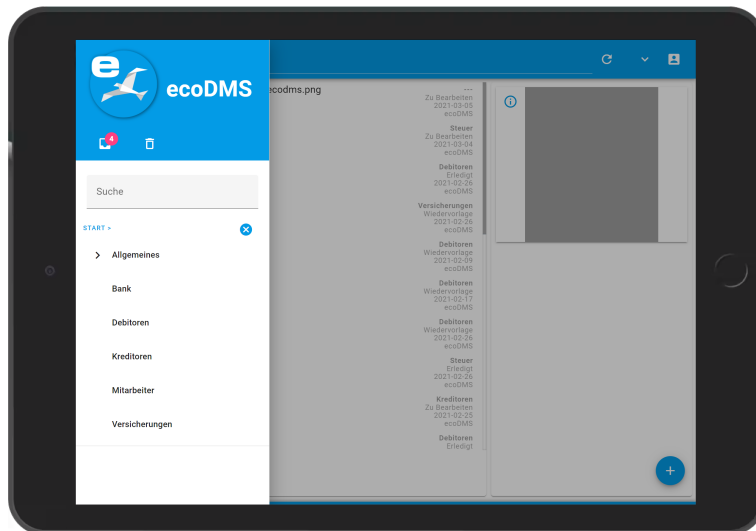


Figure 7.1: Drawer with Link to Trash in the Web Client (Here: Tablet)

7.2 Move Documents to Trash

- To restore documents from the trash, you require a classification permission for those files.

To move a document to the trash, complete the following steps:

1. Select the documents in the web client by clicking the box next to the DocID
2. A new row appears above the document table
3. Click the Trash icon to move the documents to the trash

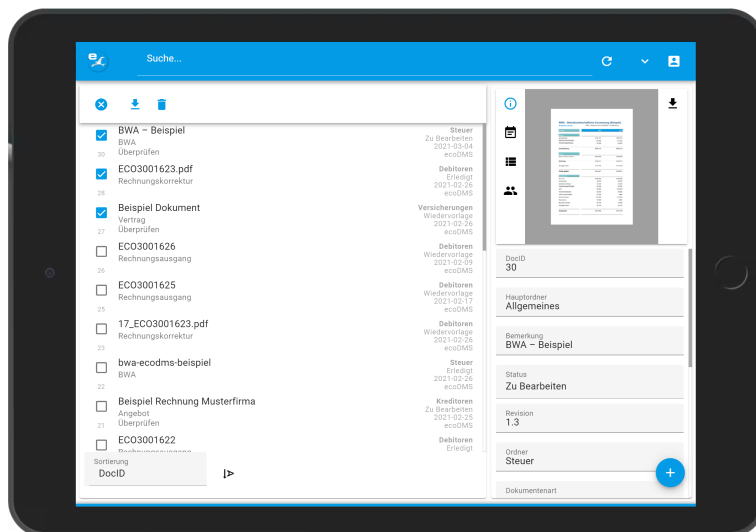


Figure 7.2: Move Selected Documents to Trash (Here: Tablet)

7.3 Restore Documents from Trash

– To restore documents from the trash, you require a classification permission for those files.

1. Slide out the drawer by clicking the ecoDMS logo in the top left corner
2. Click the blue Trash icon to open the trash
 - a) The ecoDMS web client is coloured red to indicate that the trash is open
3. Select the documents in the trash of the web client by clicking the box next to the DocID
4. A new row appears above the document table
5. Click the Trash icon and select "Restore"

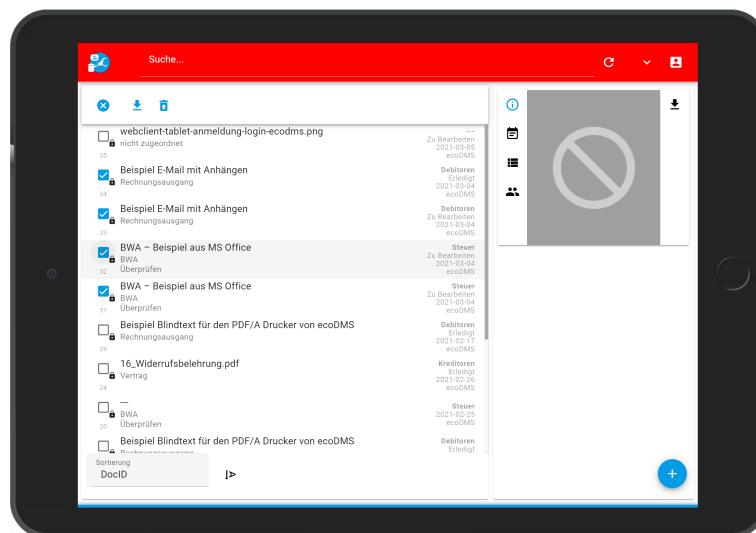


Figure 7.3: Restore Selected Documents From Trash (Here: Tablet)

8 Sort

ecoDMS displays the documents starting with the latest DocID by default. You can sort the displayed documents in any way you like. To do so, there is a "Sort By" list box at the bottom left of your web client.

1. Select the attribute by which you want to sort the list.
2. Use the Arrow icon to the right to determine whether the ecoDMS Web client sorts in ascending or descending order.
3. ecoDMS displays the search results in the overview according to the selected setting.

9 Login Credentials

Please refer to the ecoDMS manuals for the basic login credentials.