



ecoDMS Build 24.01

INSTALLATION

Imprint

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1 Basics

You should read the following basics before each installation

1.1 System Requirements

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

```
https://www.ecodms.de/en/ecodms-archiv/system-requirements
```

1.2 Version Check

- Before installing, make sure that the version matches with your license.
- The version valid for you depends on your license and the selected update term. We provide updates for ecoDMS during the update period. During this period, users of the full version can download and install updates.
- You can determine the version that is valid for your license number on the ecoDMS website by entering your license information. To do so, you need your license number and the name of the license holder. The search always displays the latest ecoDMS version that is valid for you. If ecoDMS GmbH has provided later software versions, you can only use them if you renew the update term or if you use a new, valid license. The search module for checking your license is available at the following link:

```
https://www.ecodms.de/en/support/version-check
```

- If you do not have a valid ecoDMS license and want to use the system as a demo version, you can install the latest version of ecoDMS.

2 Windows

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

2.1 Upgrade

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

Important information about creating a backup before you upgrade:

- Before upgrading, you must create a full and clean backup.
 - The ecoDMS manual contains a detailed description of this process.
- Do not save this backup file in the ecoDMS Server directory!
- Also, before creating a backup, make sure that you create the backup with the latest update of your current ecoDMS version.
 - For example, 18.09-3/1
- We recommend you completely empty the inbox before backing up your data.
 - Background: If the backup is restored on a different operating system (e.g. Windows -> Linux), the paths to the files in the inbox are no longer correct. You can only delete them from the server with the dialogue box which displays.

Important notes about the database:

- When upgrading from ecoDMS version 14.08 or 16.09, PostgreSQL is upgraded to version 10.X.
- If the database was installed manually for ecoDMS, you cannot upgrade directly. In this case, complete the following steps:
 1. Create a full and clean backup
 2. Uninstall all ecoDMS components
 3. Restart your computer
 4. Now install the new version with all necessary components
 5. Restore the backup according to the steps described in the ecoDMS manual
- Do not delete or modify the directory when updating / upgrading.

PDF/A Printer upgrade under Windows:

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

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

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

General upgrade information:

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

2.2 Installation

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

2.2.1 AllInOne Installer

- Use this installation file to execute all components in sequence within one installation.
- In addition to the basic Windows components, the package includes
 - ecoDMS Server with postgresSQL database & container storage system,
 - ecoDMS Client including Inbox & Connection Manager
 - ecoDMS PDF/A Printer
 - also all plugins/add-ons and the ecoDMS Client for macOS
- Similar to ScanInput, a desktop link to the folder containing these files is created.
- If all ecoDMS components of the installation have been installed on a workstation, an ecoDMS profile will already exist in the Connection Manager for this workstation. Please refer to the chapter "Access Data" in the ecoDMS manual for the login credentials for the default profile.

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

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

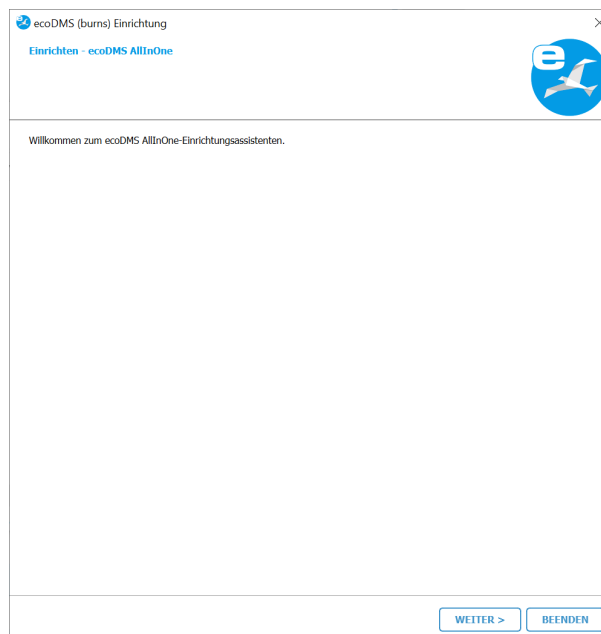


Figure 2.1: Install ecoDMS Basic Components via AllInOne: Welcome Screen

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

2.2.2 ecoDMS Server

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

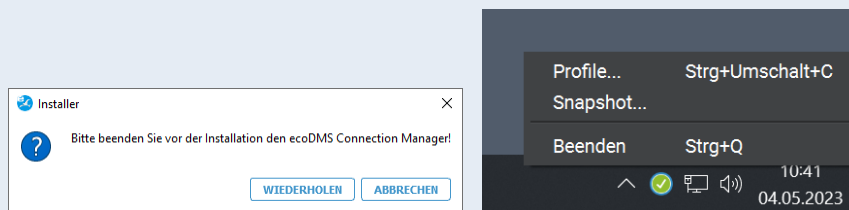


Figure 2.2: Message - Please Exit Connection Manager

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

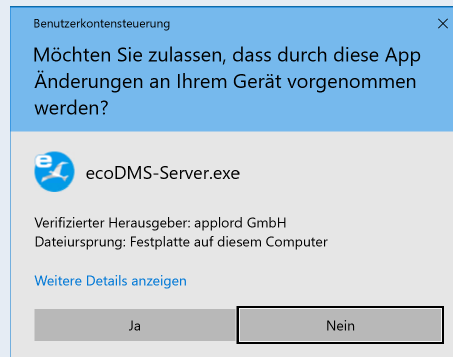


Figure 2.3: Confirm the Windows security prompt with "Yes" to run the ecoDMS Server installation

The following explains how to install ecoDMS Server under Windows.

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

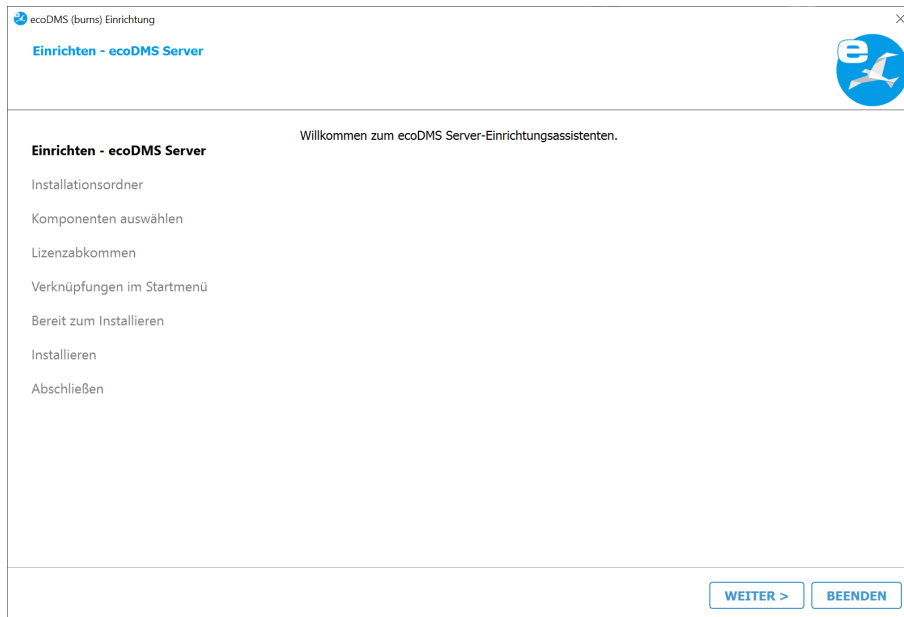


Figure 2.4: Install ecoDMS Server: Start Screen

5. Depending on the installation, the following window will appear:

- a) Initial installation: Select the installation directory. The suggested folder can optionally be changed by clicking on "Browse".

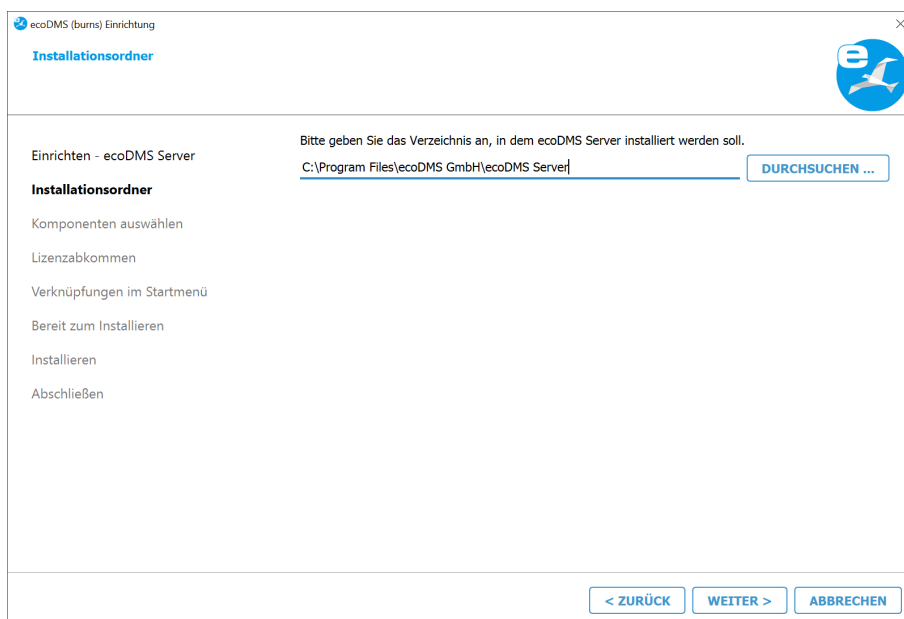


Figure 2.5: ecoDMS Server installieren: Installationsziel

- b) Update von ecoDMS (burns): Der Installer wird die bestehende ecoDMS-Datenbank upgraden. Stellen Sie sicher, dass eine aktuelle Datensicherung vorliegt und bestätigen Sie dann die Anforderungen zum Fortfahren der Installation.
- i. OK, ich stimme zu.
 - ii. Ja, ich habe eine aktuelle Datensicherung

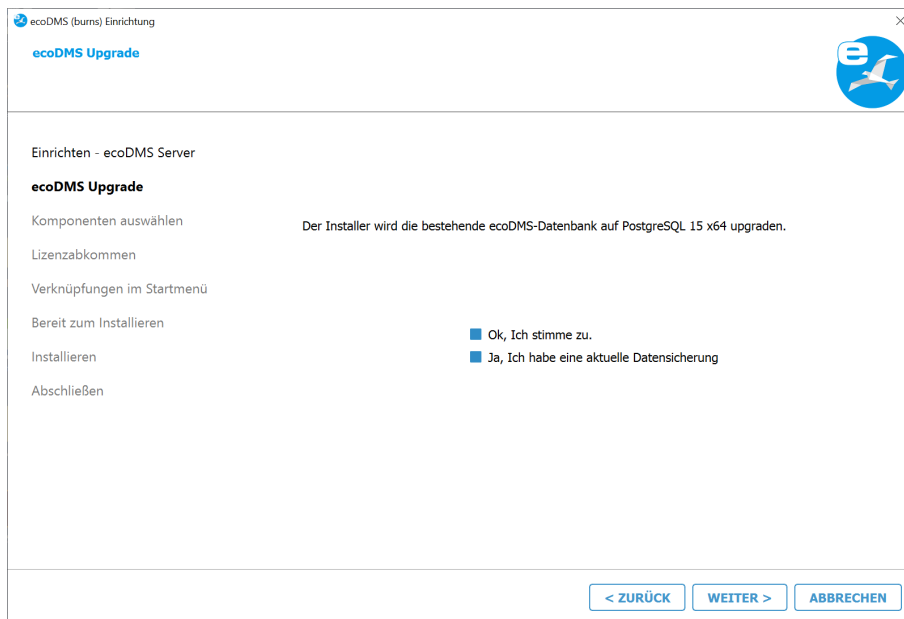


Figure 2.6: ecoDMS Server installieren: Datenbank Upgrade (ecoDMS burns Update)

6. Select the server components you want to install.

a) We recommend you install "ecoDMS Server" and "postgreSQL".

i. Der ecoDMS Server kann an dieser Stelle nicht abgewählt werden.

b) If the installation is an update, only "ecoDMS Server" is displayed here for selection.

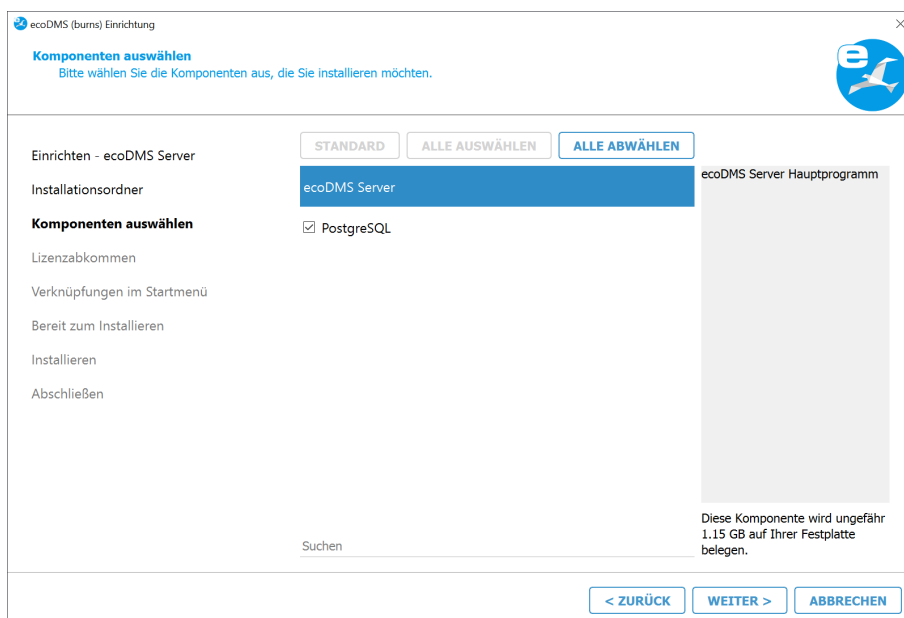


Figure 2.7: Install ecoDMS Server: Select Components

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

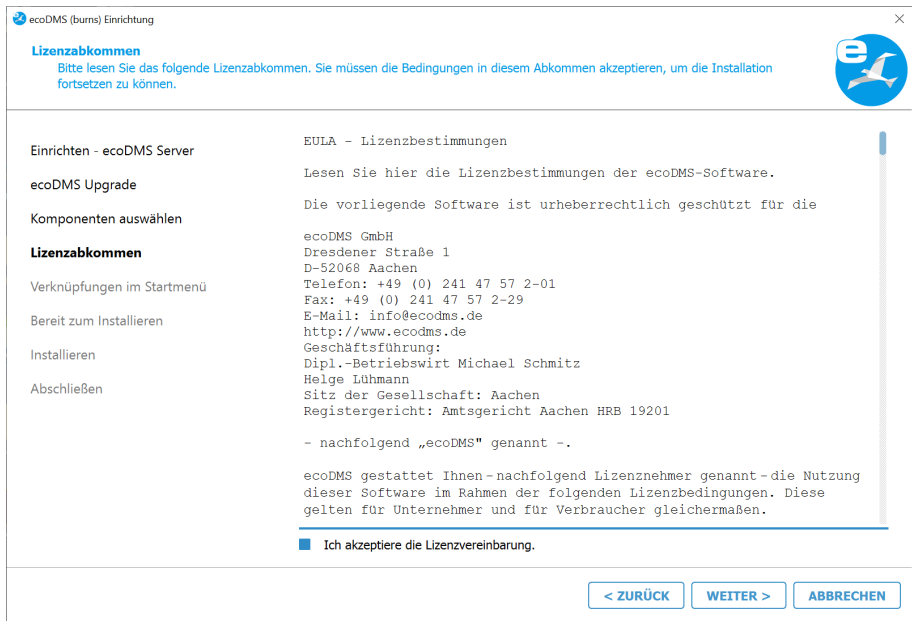


Figure 2.8: Install ecoDMS Server: License Agreement

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

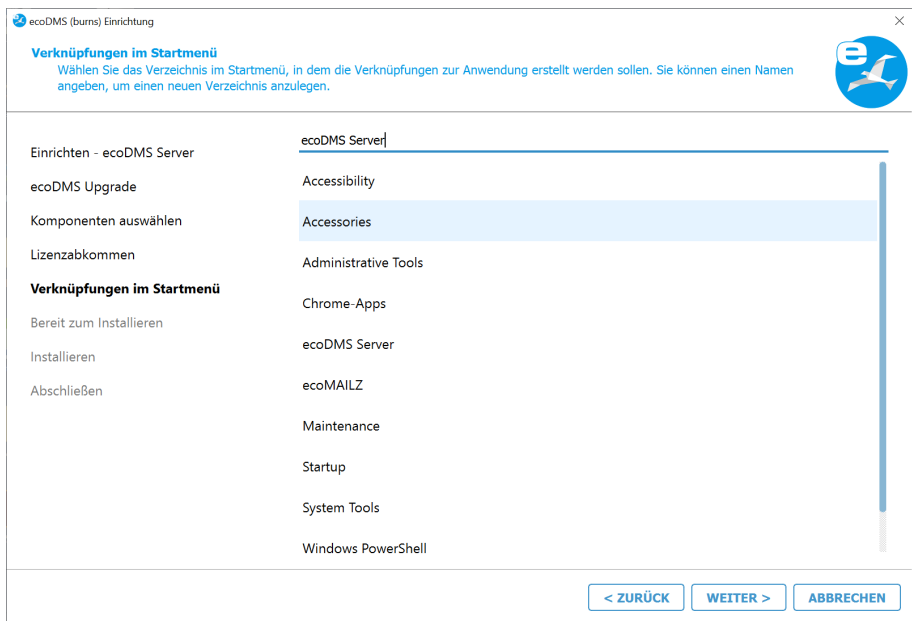


Figure 2.9: Install ecoDMS Server: Start Menu Shortcut

9. **Only during initial installation:** The following describes how to setup the database, ports and language. In a standard setup, the default ports should not be changed. The ports are used, for example, for the client connections and for the database. If the selected port is already occupied, an error message displays.

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

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

17001

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

17002

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

8080

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

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

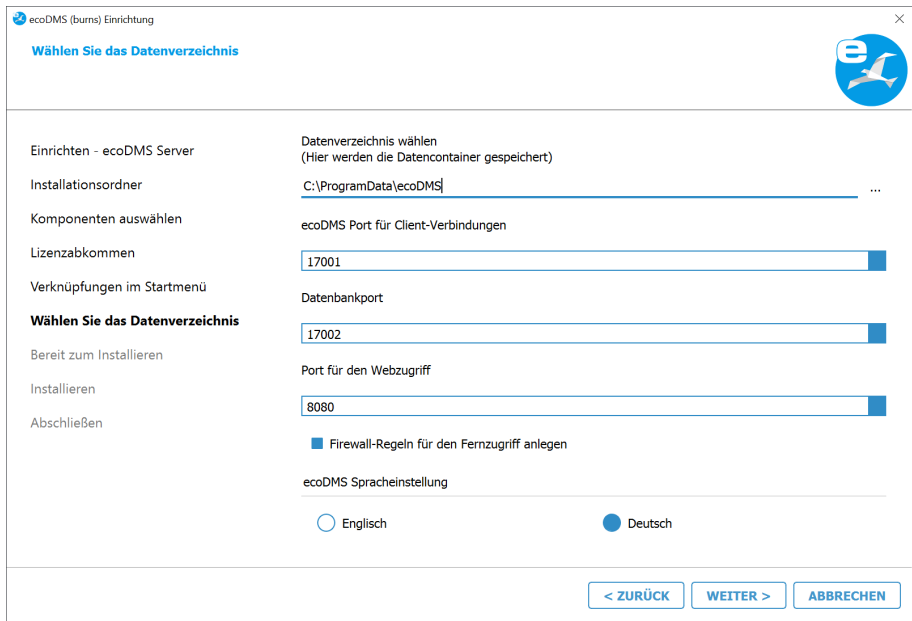


Figure 2.10: Install ecoDMS Server: Database and Port Settings

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

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

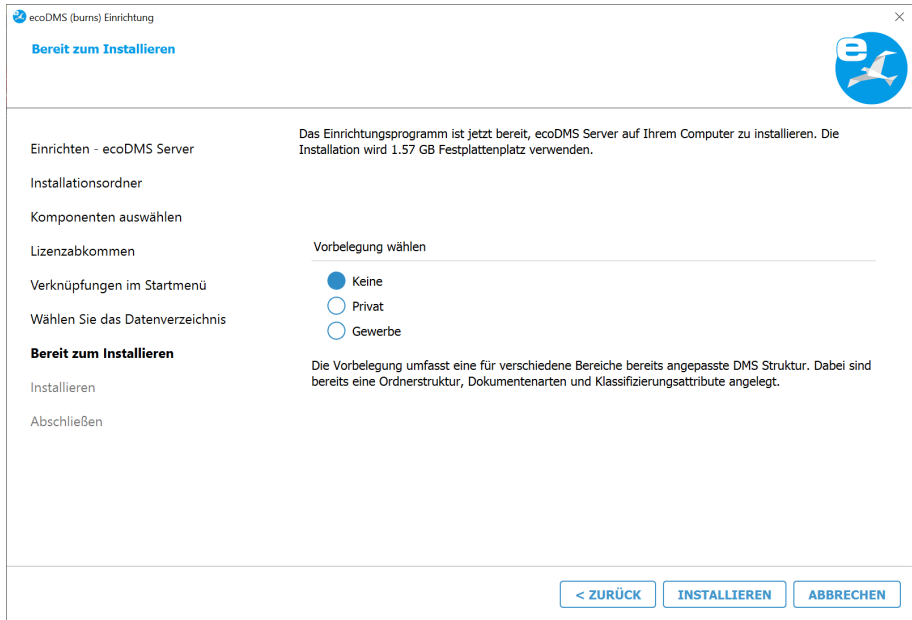


Figure 2.11: Install ecoDMS Server: Default Settings (Only for German System Environment)

11. ecoDMS Server is now ready for installation. Start the installation by clicking the "Install" button. The installation is executed. This process may take a while.

- a) The following components are installed (depending on selection and software version).
- ecoDMS Server
 - Microsoft Visual C++
 - postgreSQL

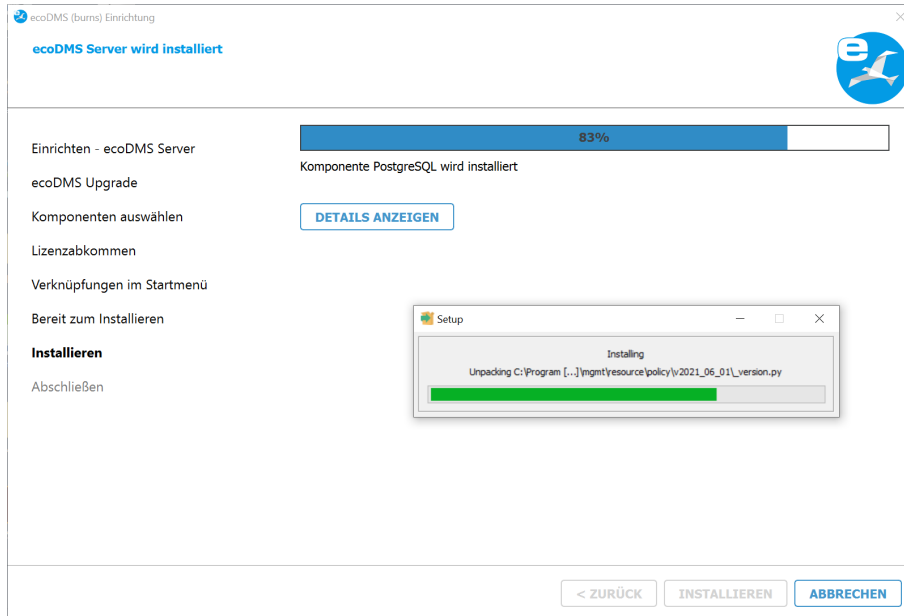


Figure 2.12: Install ecoDMS Server: Installation

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

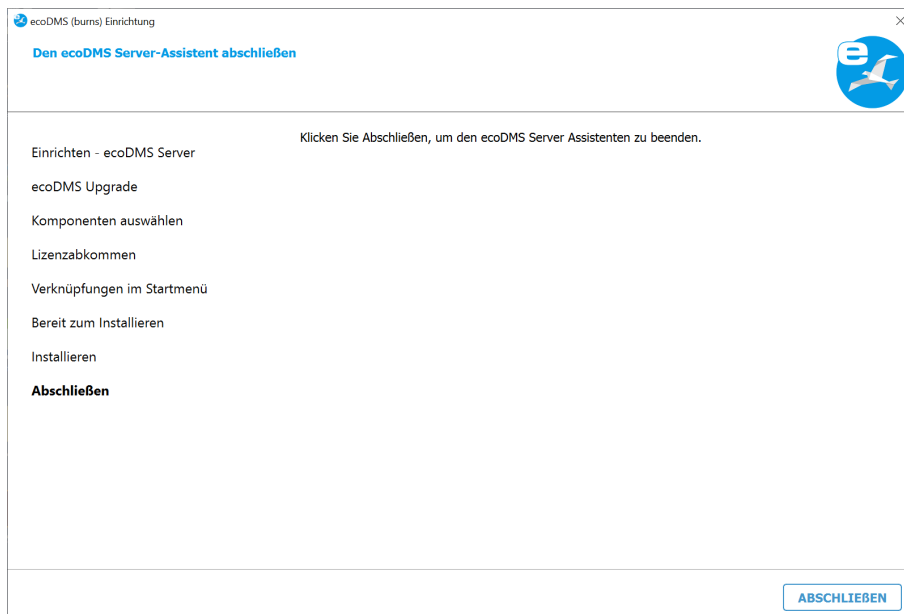


Figure 2.13: Install ecoDMS Server: Installation Completed

2.2.3 ecoDMS Client

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

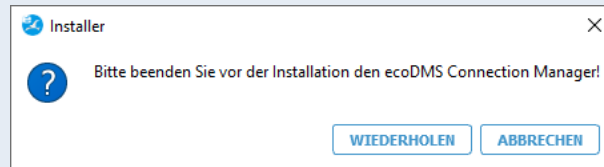


Figure 2.14: Note - Please Exit Connection Manager

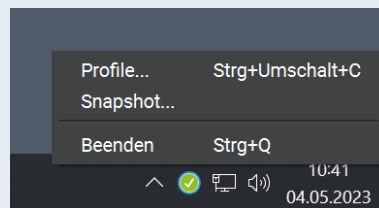


Figure 2.15: Please Exit Connection Manager

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

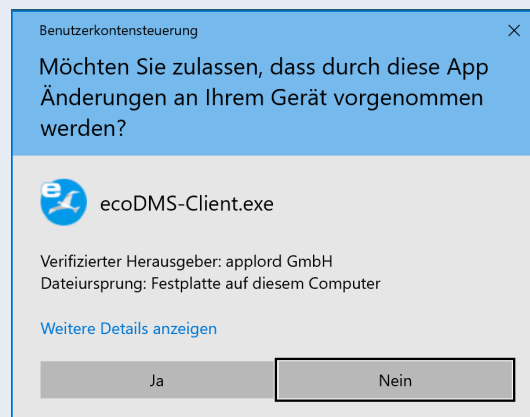


Figure 2.16: Confirm the Windows security prompt with "Yes" to run the ecoDMS Client installation

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

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

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

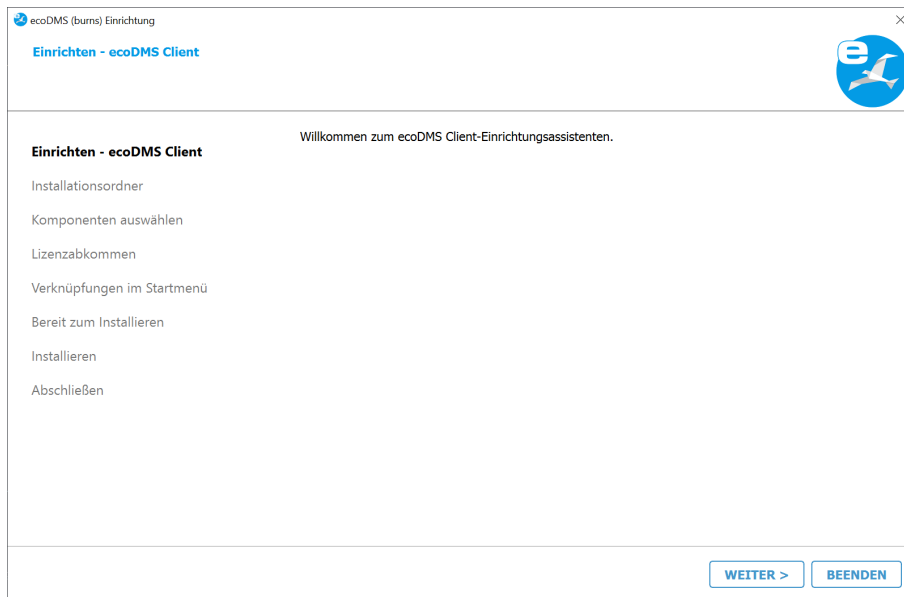


Figure 2.17: Install ecoDMS Client: Start Screen

5. **Only during initial installation:** Select the installation folder. You can change the suggested folder by clicking "Browse".

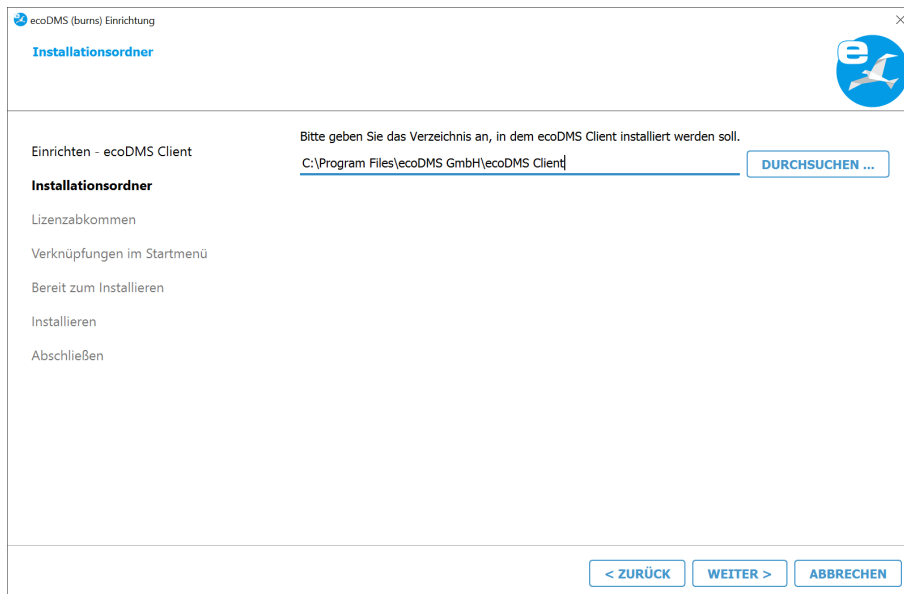


Figure 2.18: Install ecoDMS Client: Installation Destination

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

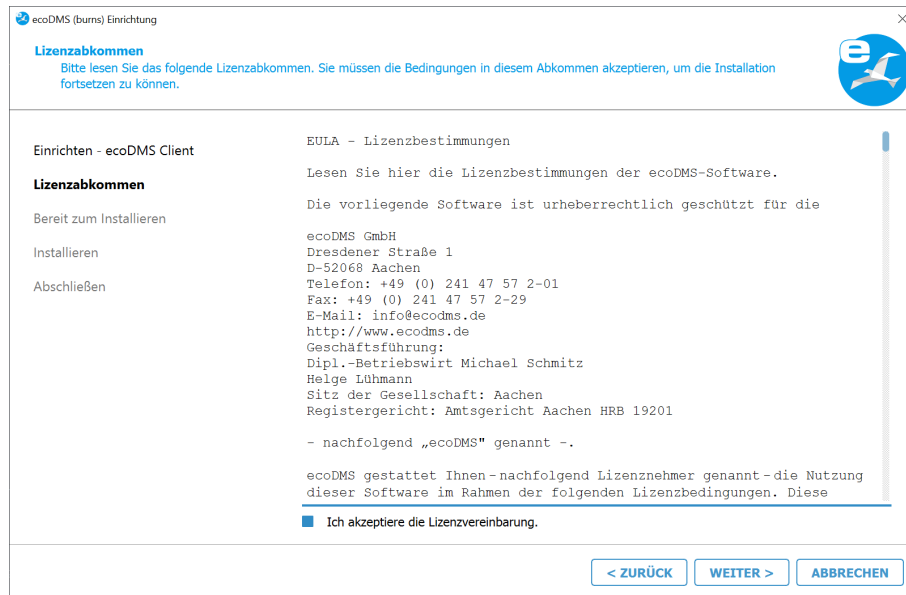


Figure 2.19: Install ecoDMS Client: License Agreement

7. ecoDMS Client is now ready for installation.

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

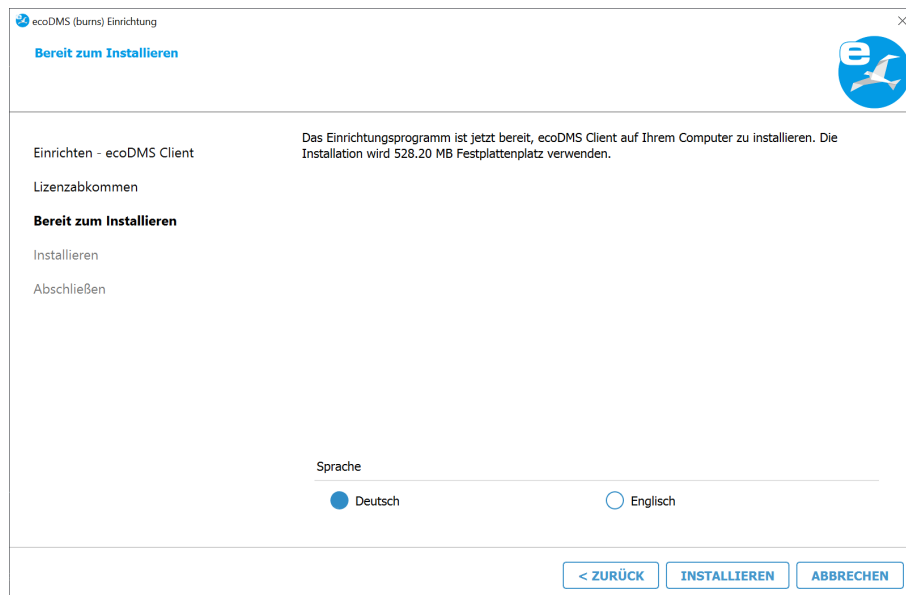


Figure 2.20: Install ecoDMS Client: Select Language and Start Installation

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

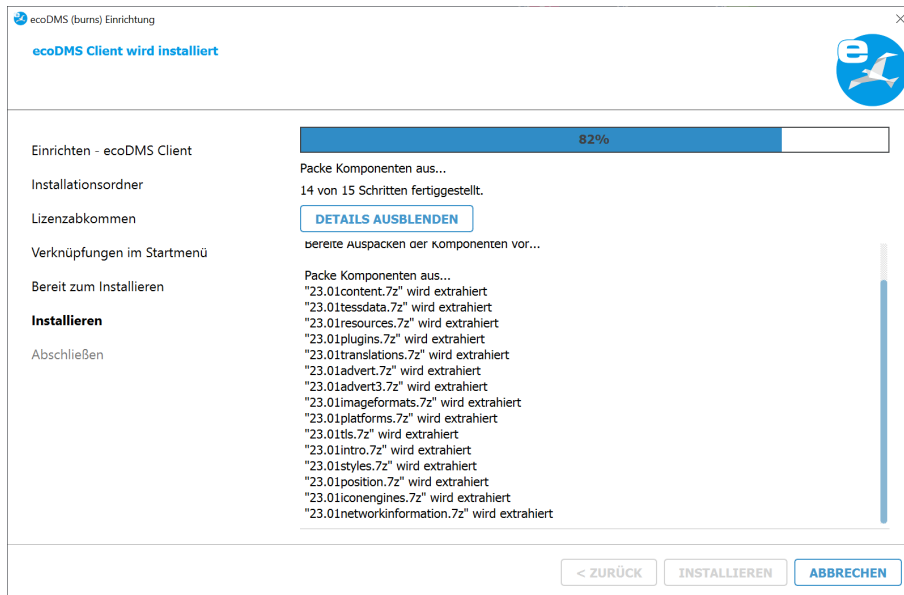


Figure 2.21: Install ecoDMS Client: Installation Process

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

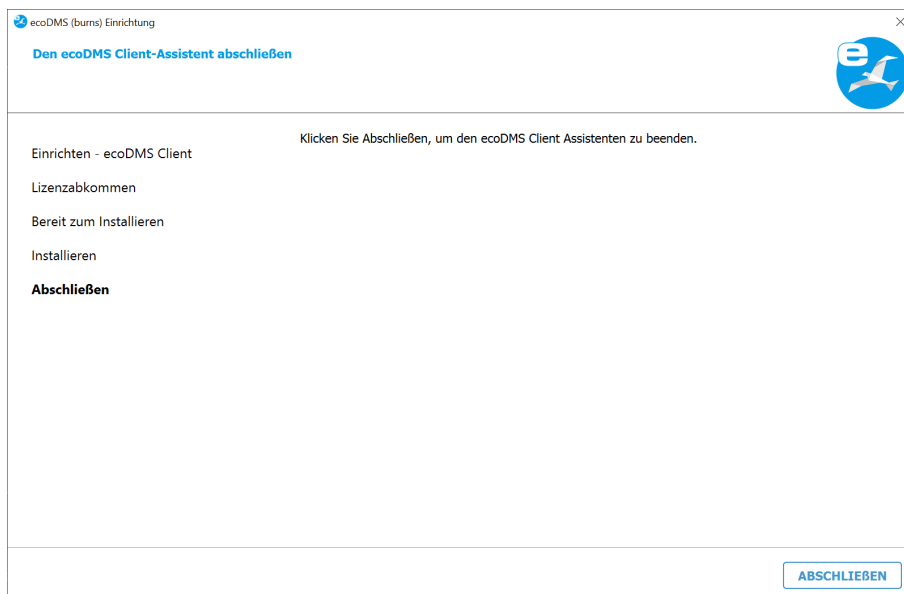


Figure 2.22: Install ecoDMS Client - Installation complete

2.2.3.1 Silent Install: ecoDMS Client

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

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

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

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

2.2.4 ecoDMS Printer

PDF/A Printer upgrade under Windows:

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

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

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

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

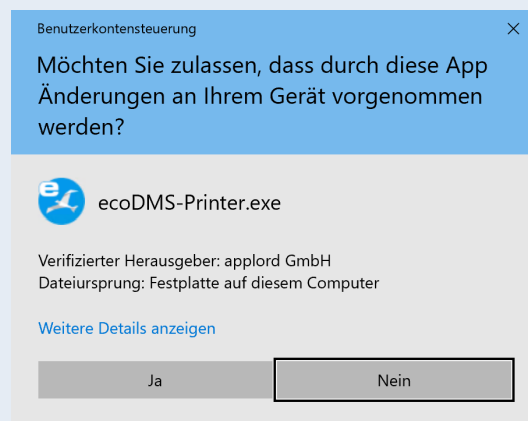


Figure 2.23: Confirm the Windows security prompt with "Yes" to run the ecoDMS Printer installation

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

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

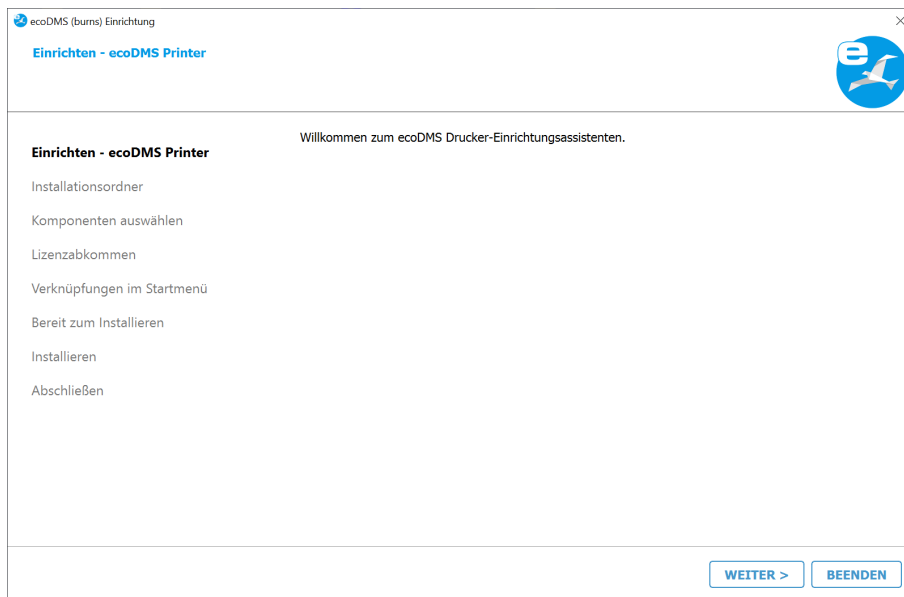


Figure 2.24: Install ecoDMS Printer: Start Screen

5. **Only during initial installation:** Select the installation folder. You can change the suggested folder by clicking "Browse".

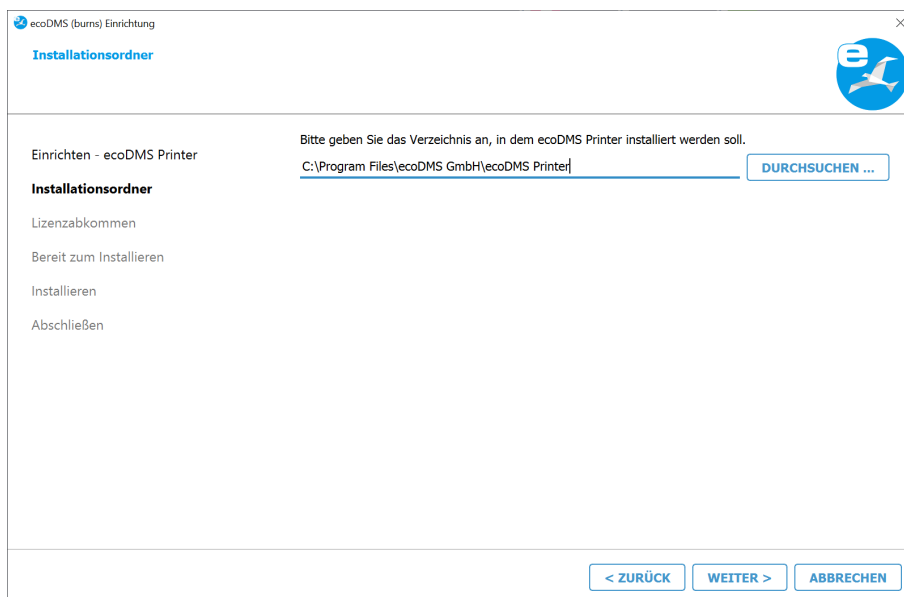


Figure 2.25: Install ecoDMS Printer: Installation Destination

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

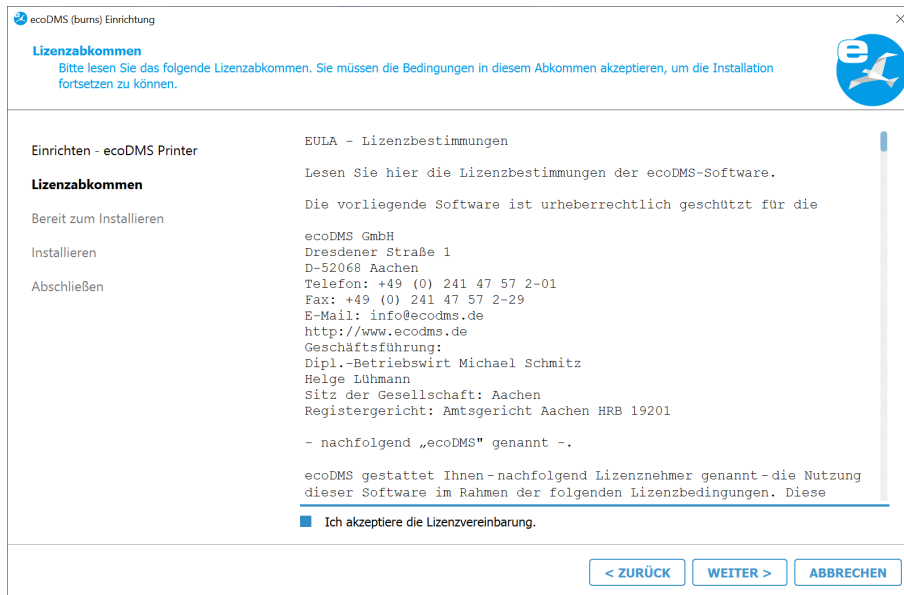


Figure 2.26: Install ecoDMS Printer: License Agreement

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

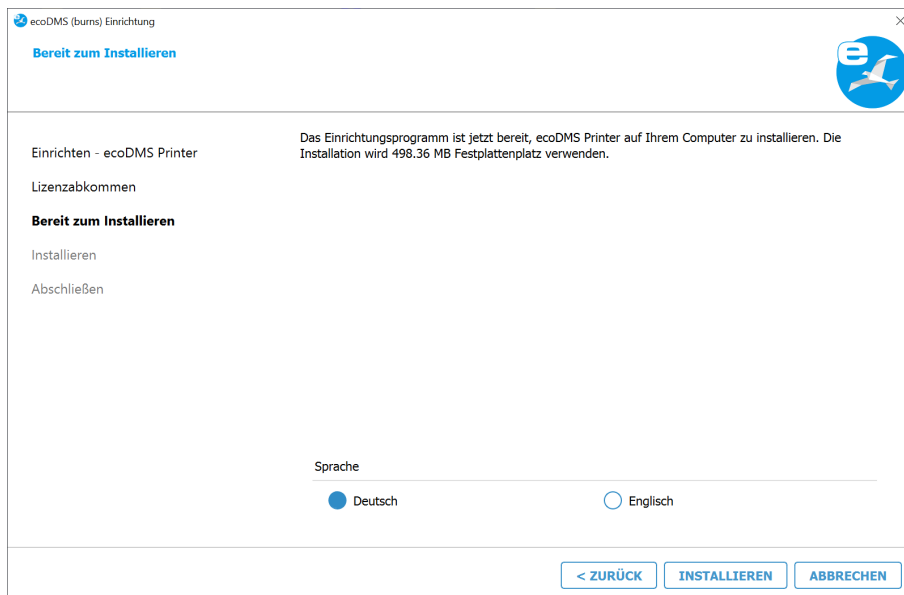


Figure 2.27: Install ecoDMS Printer: Select Language and Start Installation

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

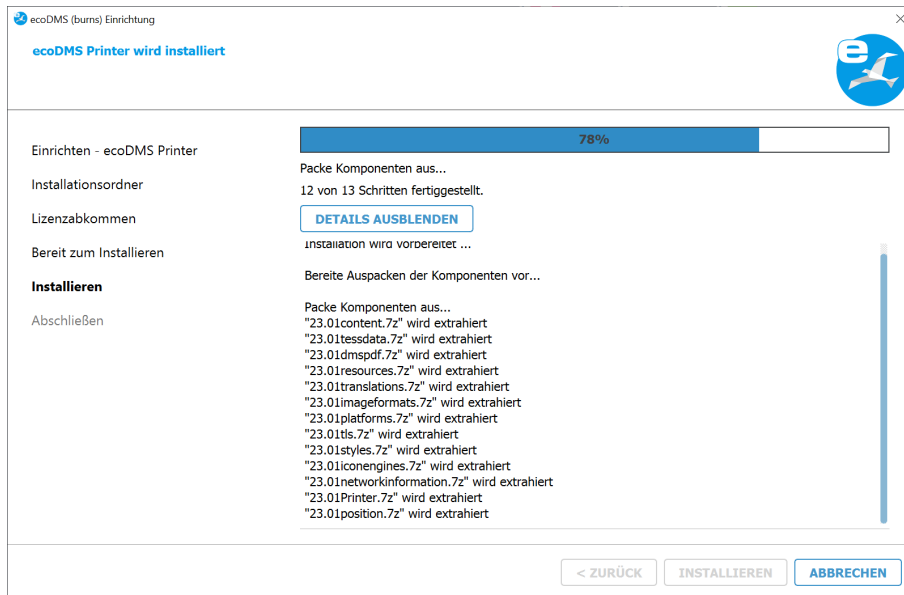


Figure 2.28: Install ecoDMS Printer: Installation Process

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



Figure 2.29: Install ecoDMS Printer - Installation Complete

2.2.4.1 Silent Install: ecoDMS Printer

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

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

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

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

2.3 Uninstall

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

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

Stop this process to continue: ecdmssinglesignon.exe

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

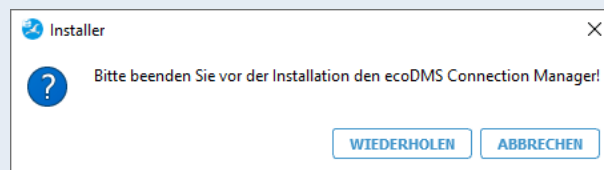


Figure 2.30: Message - Please Exit Connection Manager

- **Stop Connection Manager:** Please disconnect all user profiles connected with ecoDMS before uninstalling and exit the Connection Manager. The Connection Manager establishes the connection to ecoDMS Server. To uninstall ecoDMS and/or other ecoDMS applications, for example, you must exit the Connection Manager. To exit the Connection Manager, complete the following steps:
 - Right-click the Connection Manager icon in the toolbar of your operating system.
 - Now click "Exit".

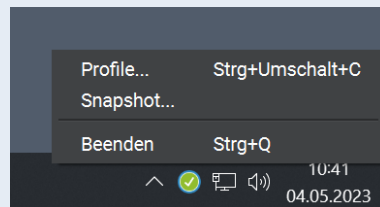


Figure 2.31: Please Exit Connection Manager

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

2.3.1 ecoDMS Server

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

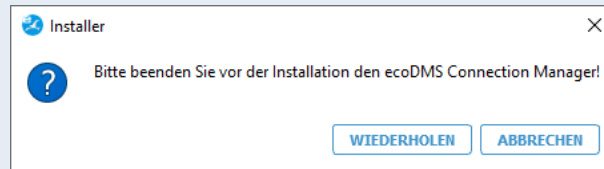


Figure 2.32: Meldung - Please Exit Connection Manager

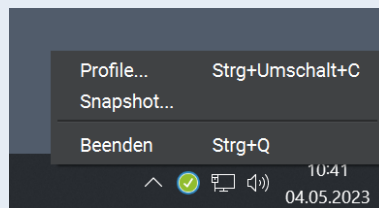


Figure 2.33: Please Exit Connection Manager

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

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

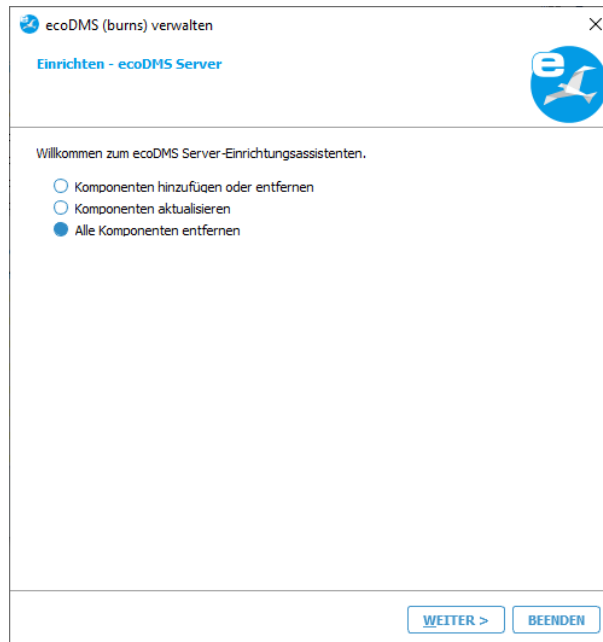


Figure 2.34: Uninstall ecoDMS Server - Select Components

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



Figure 2.35: Uninstall ecoDMS Server - Delete Data Store

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

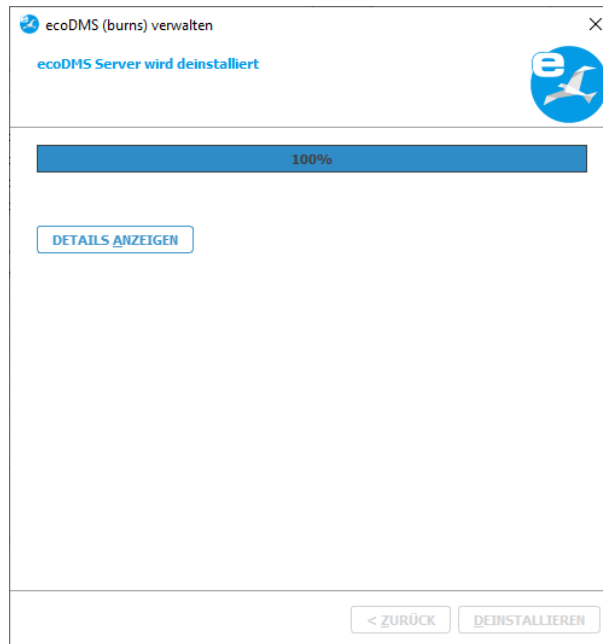


Figure 2.36: Uninstall ecoDMS Server - Uninstall Process

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

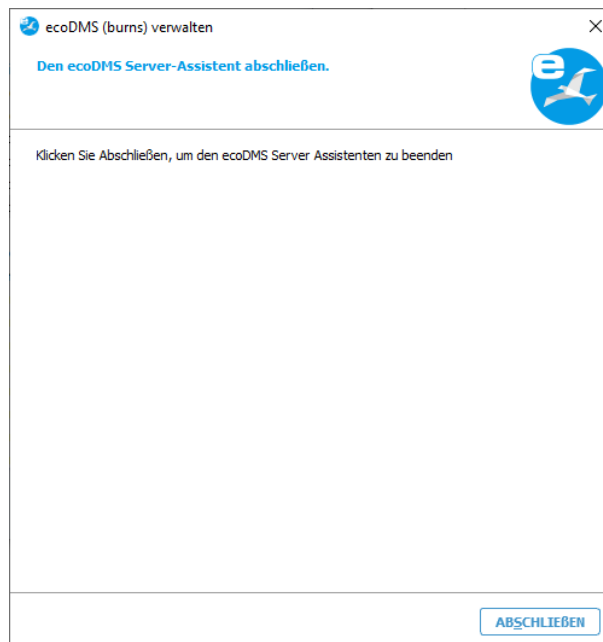


Figure 2.37: Uninstall ecoDMS Server - Uninstall Complete

2.3.2 ecoDMS Client

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

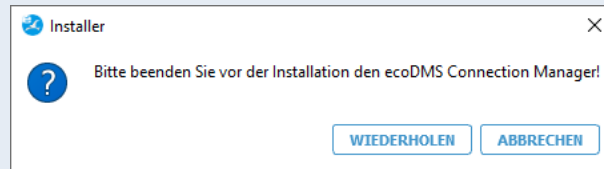


Figure 2.38: Meldung - Please Exit Connection Manager

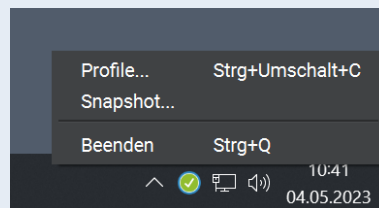


Figure 2.39: Please Exit Connection Manager

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

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

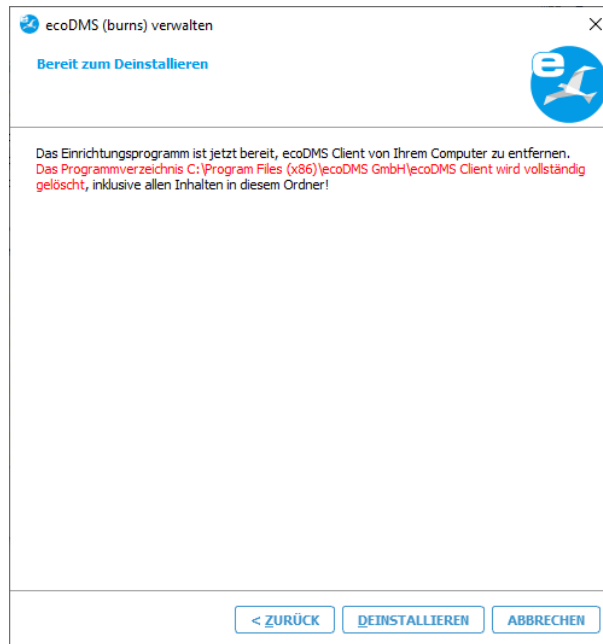


Figure 2.40: Uninstall ecoDMS Client - Delete Data Store

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

Note:

- You can find the Connection Manager on your operating system toolbar.
 - In Windows the icon usually displays next to the time.
 - Depending on the number of other applications running on your PC, Windows hides the icon. You can click the arrow to display the hidden icons.

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

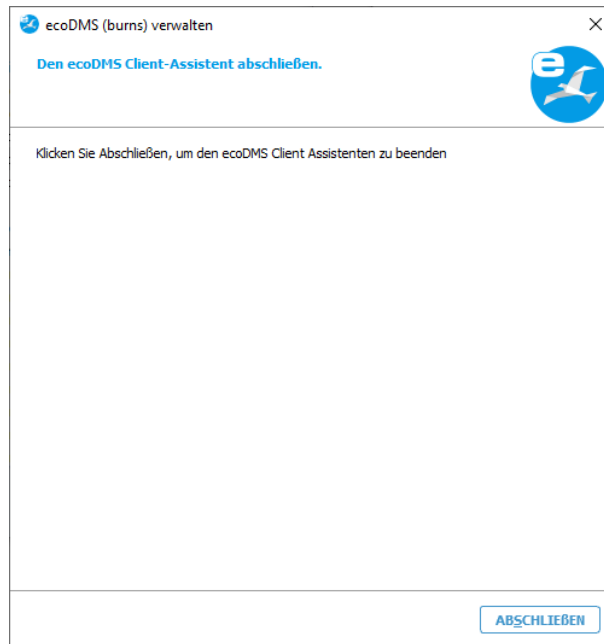


Figure 2.41: Uninstall ecoDMS Client - Uninstall Complete

2.3.3 ecoDMS Printer

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

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

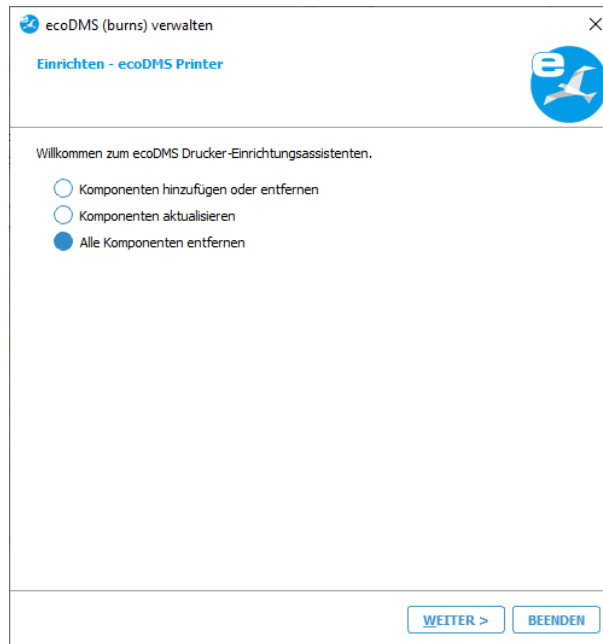


Figure 2.42: Uninstall Printer - Select Components

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

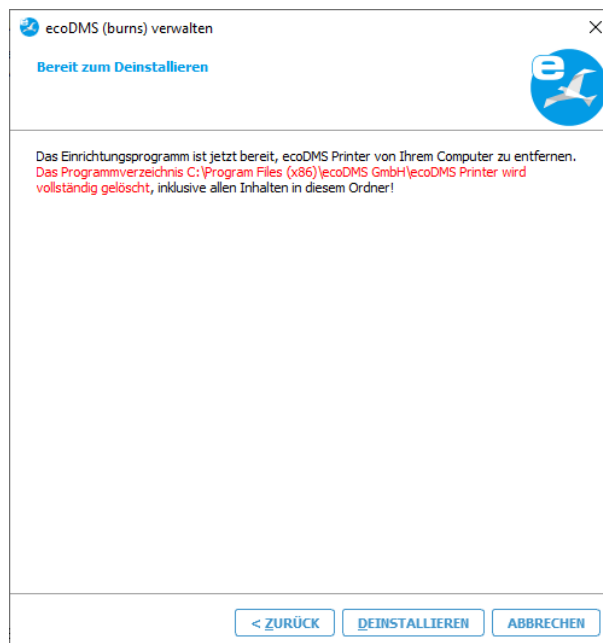


Figure 2.43: Uninstall ecoDMS Printer - Delete Data Store

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

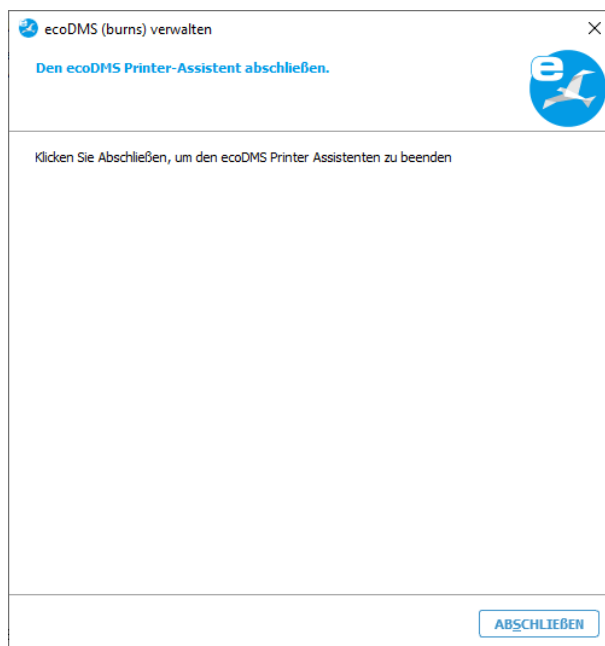


Figure 2.44: Uninstall ecoDMS Printer - Uninstall Complete

3 Linux

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

3.1 Upgrade

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

Important information about creating a backup before you upgrade:

- Before upgrading, you must create a full and clean backup.
 - The ecoDMS manual contains a detailed description of this process.
- Do not save this backup file in the ecoDMS Server directory!
- Also, before creating a backup, make sure that you create the backup with the latest update of your current ecoDMS version.
 - For example, 18.09-3/1
- We recommend you completely empty the inbox before backing up your data.
 - Background: If the backup is restored on a different operating system (e.g. Windows -> Linux), the paths to the files in the inbox are no longer correct. You can only delete them from the server with the dialogue box which displays.

Important notes about the database:

- When upgrading from ecoDMS version 14.08 or 16.09, PostgreSQL is upgraded to version 10.X.
- If the database was installed manually for ecoDMS, you cannot upgrade directly. In this case, complete the following steps:
 1. Create a full and clean backup
 2. Uninstall all ecoDMS components
 3. Restart your computer
 4. Now install the new version with all necessary components
 5. Restore the backup according to the steps described in the ecoDMS manual
- Do not delete or modify the directory when updating / upgrading.

General upgrade information:

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

3.1.1 Upgrade under Linux

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

```
sudo apt-get update
```

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

3.2 Installation

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

3.2.1 Install Editor

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

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

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

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

3.2.2 apt Sources

You will always find the up-to-date apt sources for installing the ecoDMS components on Linux distributions in the ecoDMS knowledge base at: <https://confluence.applord-gruppe.eu/ek>

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

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

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

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

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

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

64bit / Ubuntu 24.04 LTS (Noble): supported from ecoDMS Version 24.01/2

```
deb http://www.ecodms.de/ecodms_240164/noble /
```

64bit / Ubuntu 22.04 LTS (Jammy Jellyfish)

```
deb http://www.ecodms.de/ecodms_240164/jammy /
```

64bit / Ubuntu 20.04 LTS (Focal Fossa)

```
deb http://www.ecodms.de/ecodms_240164/focal /
```


64bit / Debian 12 (Bookworm)

```
deb http://www.ecodms.de/ecodms_240164/bookworm /
```

64bit / Debian 11 (Bullseye)

```
deb http://www.ecodms.de/ecodms_240164/bullseye /
```

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

Ubuntu

```
sudo wget -q0 /etc/apt/trusted.gpg.d/ecodms.asc http://www.ecodms.de/gpg/ecodms.key
```

Debian

```
su -  
wget -q0 /etc/apt/trusted.gpg.d/ecodms.asc http://www.ecodms.de/gpg/ecodms.key
```

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

```
sudo apt-get update
```

3.2.3 ecoDMS Packages

This installation includes plugins/add-ons and the ecoDMS PDF/A Printer for Windows and the ecoDMS Client for macOS and Windows. These files are stored in the following folder:

```
/opt/ecodms/ecodmsspackages
```

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

```
sudo apt-get install ecodmsspackages
```

3.2.4 ecoDMS Server

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

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

```
sudo apt-get install ecodmssserver
```

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

3.2.5 ecoDMS Client

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

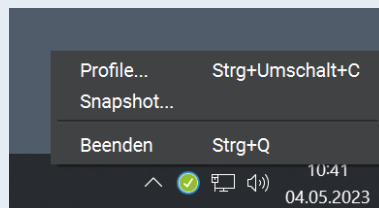


Figure 3.1: Please Exit Connection Manager

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

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

```
sudo apt-get install ecodmsclient
```
3. Confirm the displayed questions / warnings with YES by entering Y [...]Do you want to continue?[...] [...]Do you want to install these packages without checking? [...]
 - a) This process may take a while.
4. Select the language for the installation and confirm your selection with "Enter".
 - a) You can install server and client in different languages.

- b) The display of the classification attributes and messages depends, however, on the language selection of the ecoDMS Server component.
5. Read the license agreement carefully and confirm them.
 - a) Use the Tab key to skip to "OK" and confirm with "Enter".
6. The installation is performed. This operation may take a while.

3.2.6 ecoDMS Printer

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

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

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

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

3.3 Uninstall

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

3.3.1 ecoDMS Server

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

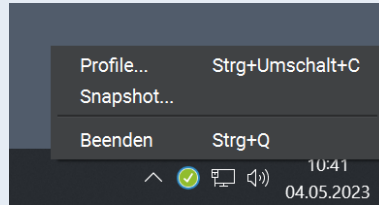


Figure 3.2: Please Exit Connection Manager

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

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

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

3.3.2 ecoDMS Client

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

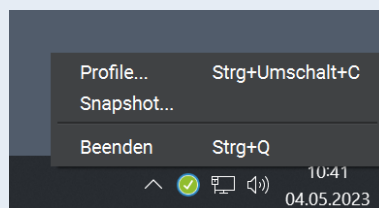


Figure 3.3: Please Exit Connection Manager

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

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

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

3.3.3 ecoDMS Printer

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

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

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

4 NAS

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

4.1 Upgrade and Update

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

Important information about creating a backup before you upgrade:

- Before upgrading, you must create a full and clean backup.
 - The ecoDMS manual contains a detailed description of this process.
- Do not save this backup file in the ecoDMS Server directory!
- Also, before creating a backup, make sure that you create the backup with the latest update of your current ecoDMS version.
 - For example, 18.09-3/1
- We recommend you completely empty the inbox before backing up your data.
 - Background: If the backup is restored on a different operating system (e.g. Windows -> Linux), the paths to the files in the inbox are no longer correct. You can only delete them from the server with the dialogue box which displays.

Important notes about the database:

- When upgrading from ecoDMS version 14.08 or 16.09, PostgreSQL is upgraded to version 10.X.
- If the database was installed manually for ecoDMS, you cannot upgrade directly. In this case, complete the following steps:
 1. Create a full and clean backup
 2. Uninstall all ecoDMS components
 3. Restart your computer
 4. Now install the new version with all necessary components
 5. Restore the backup according to the steps described in the ecoDMS manual
- Do not delete or modify the directory when updating / upgrading.

General upgrade information:

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

4.1.1 Upgrade on a NAS

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

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

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

4.1.2 Update on a NAS

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

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

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

4.2 Synology Installation (ecoDMS Server)

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

4.2.1 Create Folder Structure for ecoDMS (Example)

For a standard ecoDMS installation on a NAS you require

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

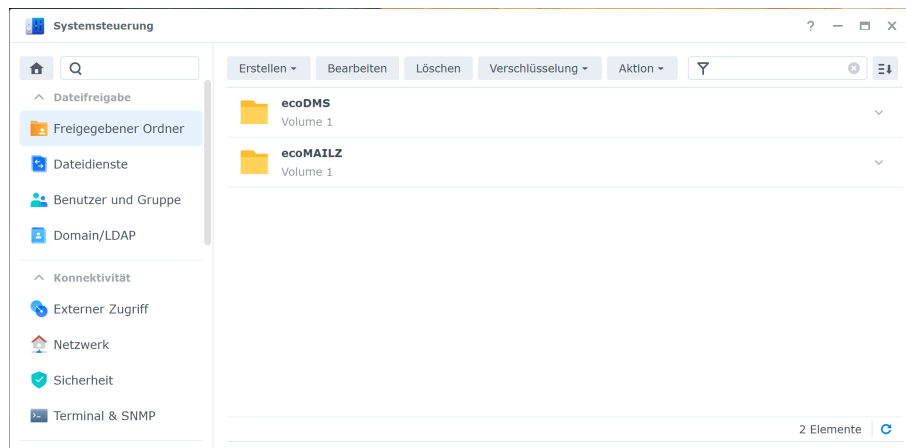


Figure 4.1: Synology - Create Shared Folder

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



Figure 4.2: Synology - Shared Folder - Permissions

a) A typical folder structure could look like this:

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

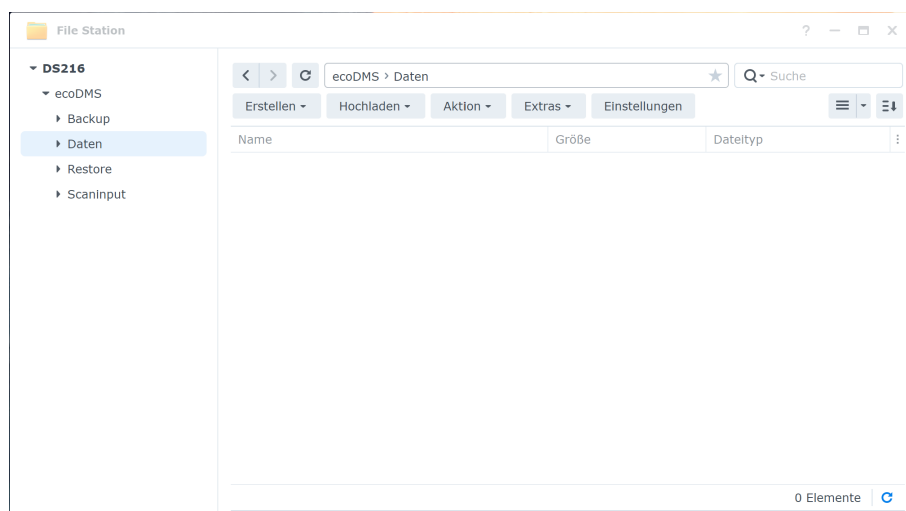


Figure 4.3: Synology - Folder Structure (Example)

4.2.2 Install & Open Docker

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



Figure 4.4: Synology - Install Docker App

4.2.3 Search & Install ecoDMS Images

1. In the "Registration" area of the "Docker" app, search for the "ecoDMS image" with the name "ecodms/ecodms"
2. Then install the package by
 - a) right-clicking the **image 24.01**,
 - b) then clicking "Download This Image",
 - c) and then select and confirm the **entry 24.01** in the "Select tag" dialog box.

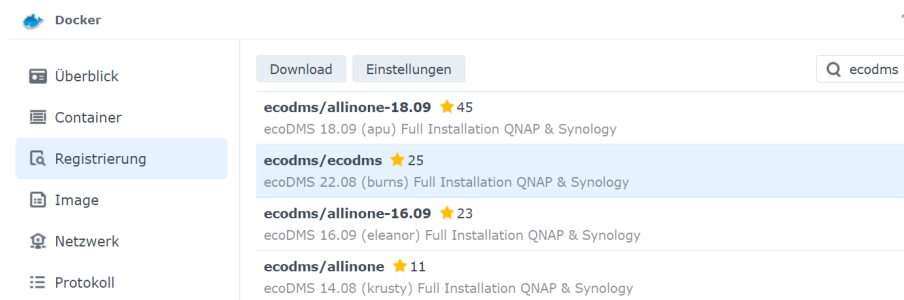


Figure 4.5: Synology - Install ecoDMS Image

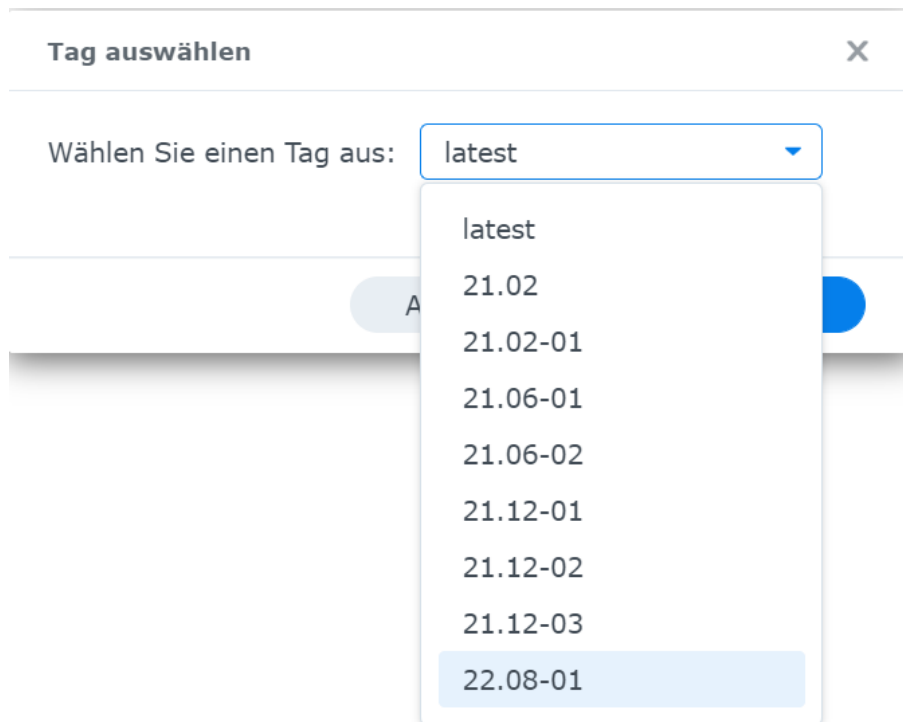


Figure 4.6: Synology - Select Tag)

4.2.4 Create Container

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

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

4.2.5 Container Settings

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

ecodms/ecodms(latest) - Container erstellen

Allgemeine Einstellungen

Containername:

Container mit hoher Priorität ausführen

Ressourcenbeschränkung aktivieren

CPU-Priorität: Niedrig Mittel Hoch

Speichergrenzwert: 8192 MB

Figure 4.7: Synology - Container Name

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

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

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

Lokaler Port	Container-Port	Typ
17001	17001	TCP
17002	17002	TCP
17004	8080	TCP
17005	8180	TCP

Figure 4.8: Synology - Extended Settings (Port)

4. Now select the "Volume" tab.

4.2.6 Configure Mount Paths

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

Datei/Ordner	Mount-Pfad	<input type="checkbox"/> Schreibgeschü...

Figure 4.9: Synology - Extended Settings - Add Folder

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

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

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

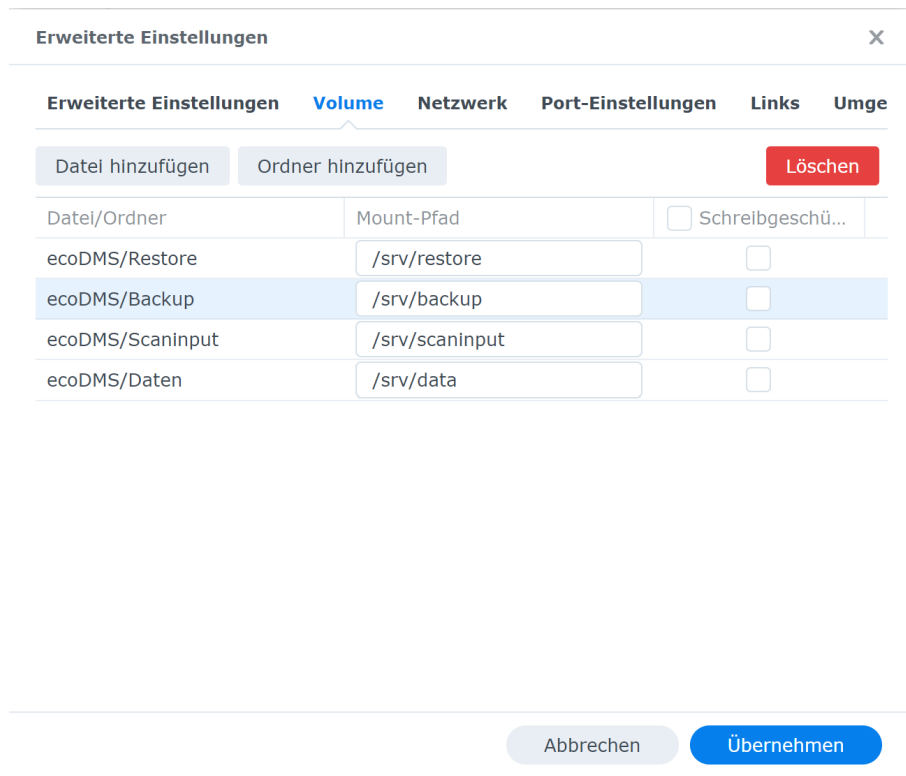


Figure 4.10: Synology - Extended Settings - ecoDMS Data Storage Location

b) It is important that

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

The mount paths are:

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

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

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

```
/srv/scaninput
```

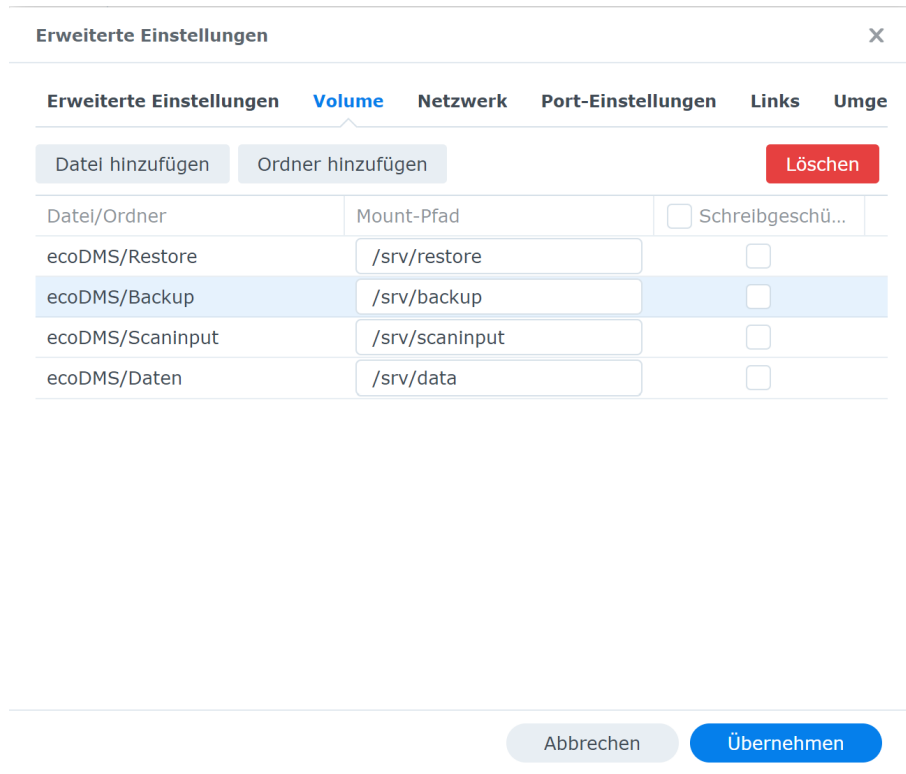
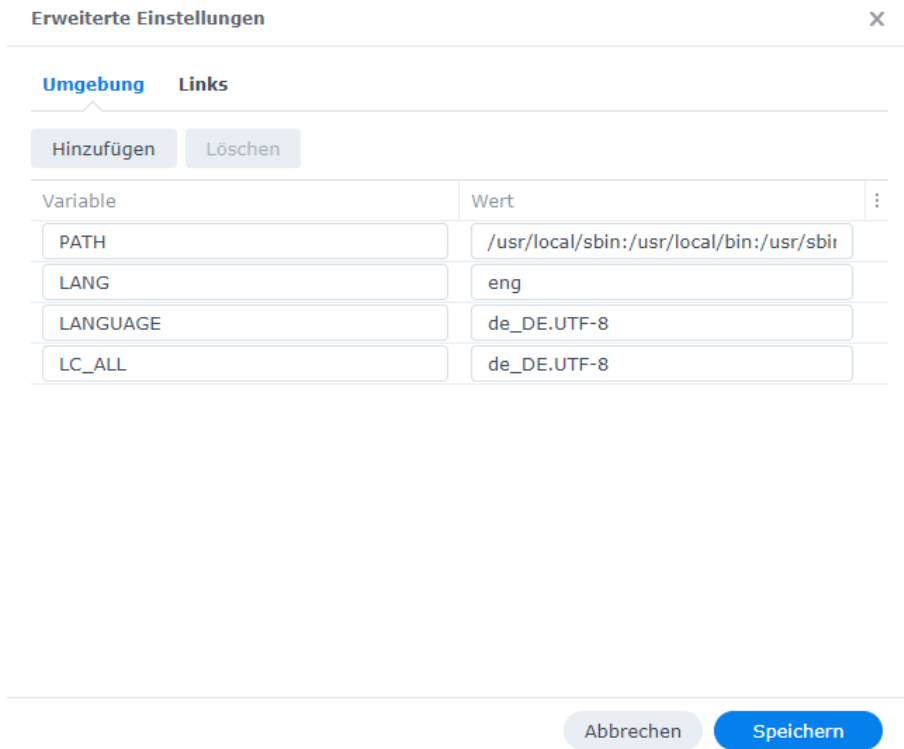



Figure 4.11: Synology - Extended Settings - Volume

4.2.7 Change Language (English)

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

```
LANG=eng
```



The screenshot shows the 'Erweiterte Einstellungen' (Advanced Settings) window with the 'Umgebung' (Environment) tab selected. At the top, there are two tabs: 'Umgebung' and 'Links'. Below the tabs are two buttons: 'Hinzufügen' (Add) and 'Löschen' (Delete). A table lists environment variables with their values. The table has two columns: 'Variable' and 'Wert'. The variables listed are PATH, LANG, LANGUAGE, and LC_ALL. At the bottom of the window, there are two buttons: 'Abbrechen' (Cancel) and 'Speichern' (Save).

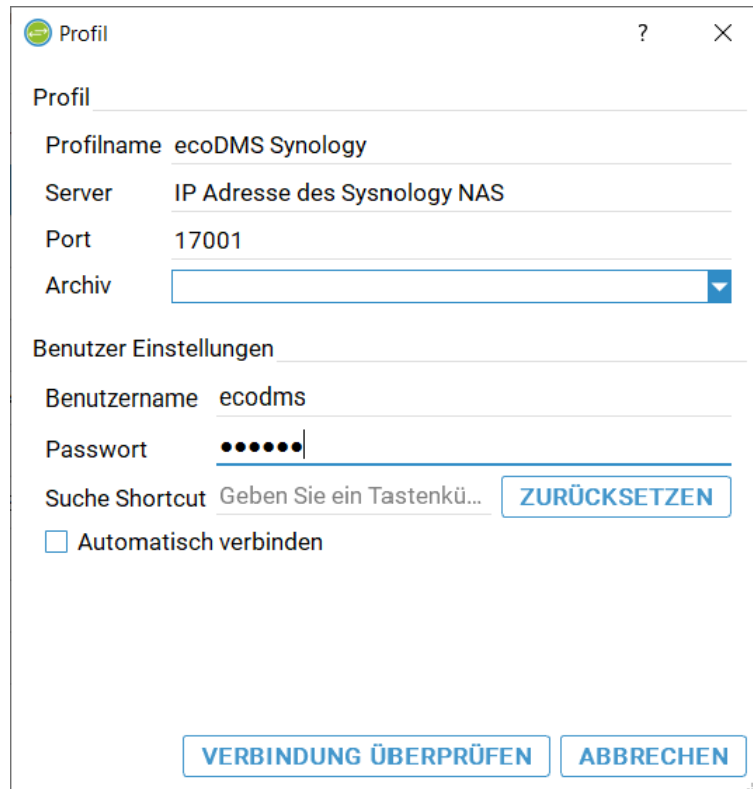
Variable	Wert
PATH	/usr/local/sbin:/usr/local/bin:/usr/sbin
LANG	eng
LANGUAGE	de_DE.UTF-8
LC_ALL	de_DE.UTF-8

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

4.2.8 Start Container

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

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



The screenshot shows a window titled 'Profil' with the following fields and options:

- Profilname:** ecoDMS Synology
- Server:** IP Adresse des Synology NAS
- Port:** 17001
- Archiv:** (empty dropdown menu)
- Benutzer Einstellungen:**
 - Benutzername:** ecodms
 - Passwort:** (masked with dots)
 - Suche Shortcut:** Geben Sie ein Tastenkü... (with a 'ZURÜCKSETZEN' button)
 - Automatisch verbinden**

At the bottom, there are two buttons: 'VERBINDUNG ÜBERPRÜFEN' and 'ABBRECHEN'.

Figure 4.13: Synology - Connection Manager - Setup Connection

4.3 Install QNAP (ecoDMS Server)

This section describes how to install ecoDMS Server on a QNAP NAS (Network Attached Storage).

4.3.1 Ordnerstruktur für ecoDMS anlegen

For a standard ecoDMS installation on a NAS, you require the following folders in the File Station:

- Data (e.g. below Container)
- Backup
- Restore
- and a Shared Folder for the scaninput.

You must set up the folders when creating the container.

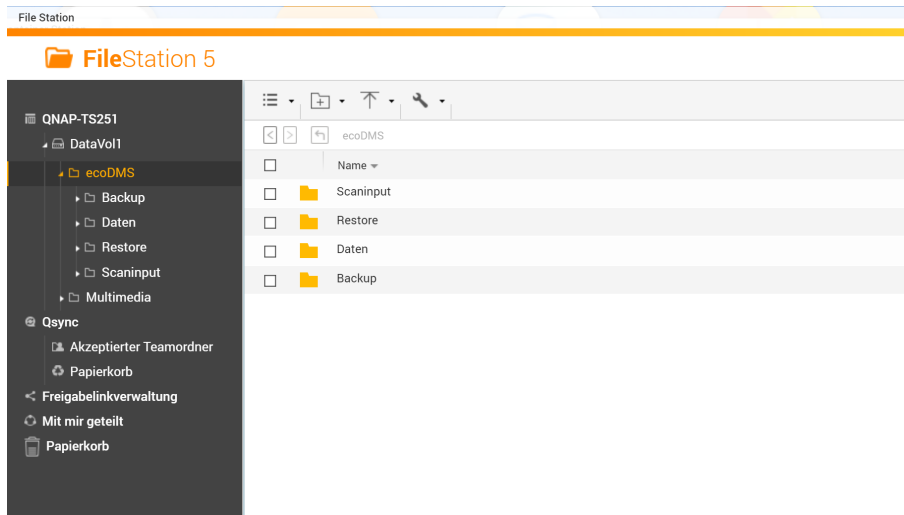


Figure 4.14: QNAP - Folder treer

4.3.2 Install & Open ContainerStation

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



**Container
Station**
Dienstprogramme



Figure 4.15: QNAP - AppCenter - Install ContainerStation

4.3.3 Search & Install ecoDMS Images

1. To search for the ecoDMS image, click the "Explore" icon at the top right.

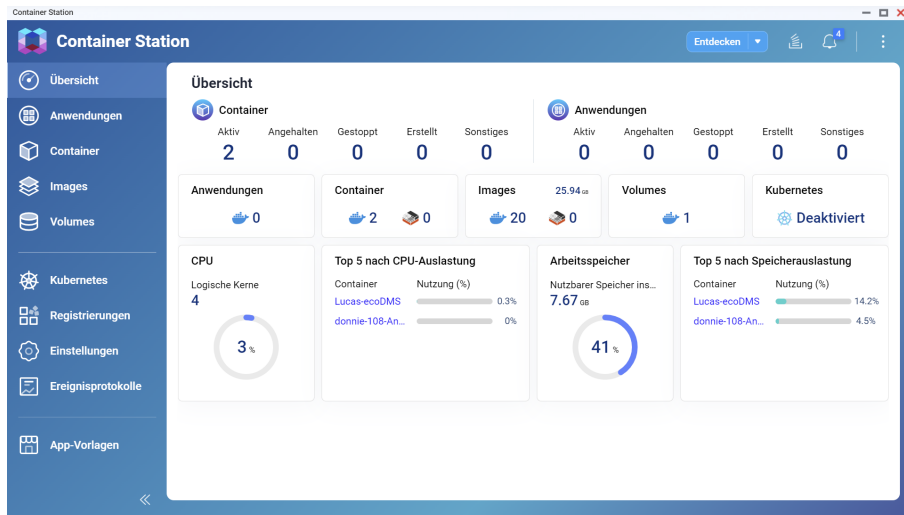


Figure 4.16: QNAP - ContainerStation

2. Enter “ecoDMS” and select “ecodms/ecodms”. Then click “Deploy”.



Figure 4.17: QNAP - ContainerStation - ecoDMS Image

3. You can now select the image version (e.g. 24.01-02).

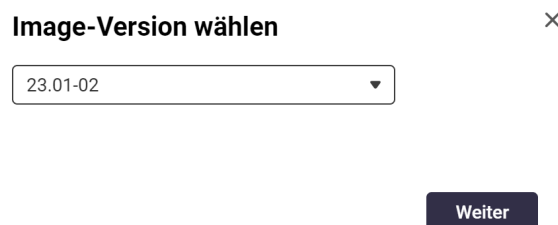


Figure 4.18: QNAP - ContainerStation - Select ecoDMS Image Version

4.3.4 Container Settings

1. Assign a name to the container.

Figure 4.19: QNAP - Assign Container Name

2. Click "Advanced Settings".
3. Select the "Networks" tab.
4. Now you can configure the "Port" settings.

Host	Container
17001	17001
17002	17002
17004	8080
17005	8180

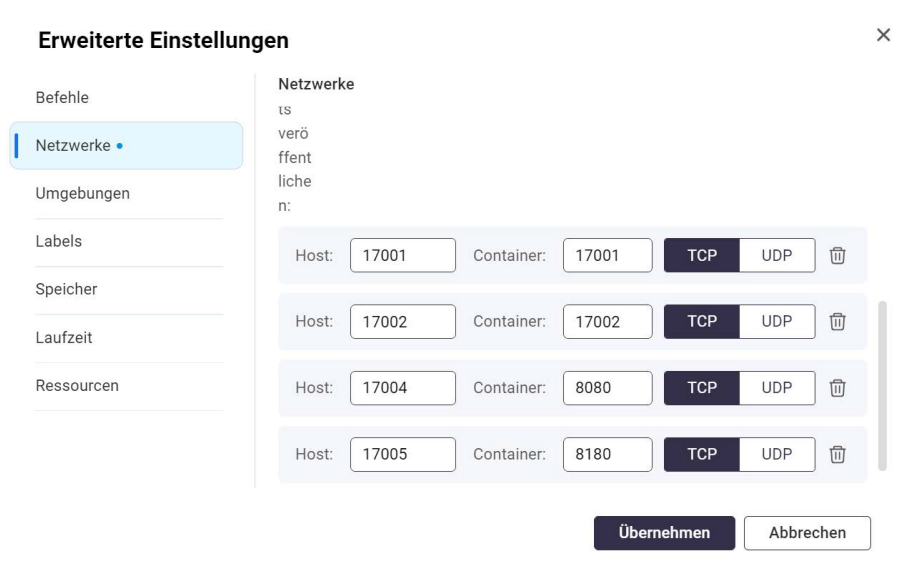


Figure 4.20: QNAP - Advanced Settings - Networks

5. Click "Accept".

4.3.5 Configure Mount Paths

1. In the Advanced Settings, select the "Storage" tab.
2. On the "Storage" tab, choose where you want to store your ecoDMS data on the NAS.
 - a) Click "Add Volume" and select "Bind Mount Host Path"

Host	Container
/ecoDMS/Data	/srv/data
/ecoDMS/Scaninput	/srv/scaninput
/ecoDMS/Backup	/srv/backup
/ecoDMS/Restore	/srv/restore

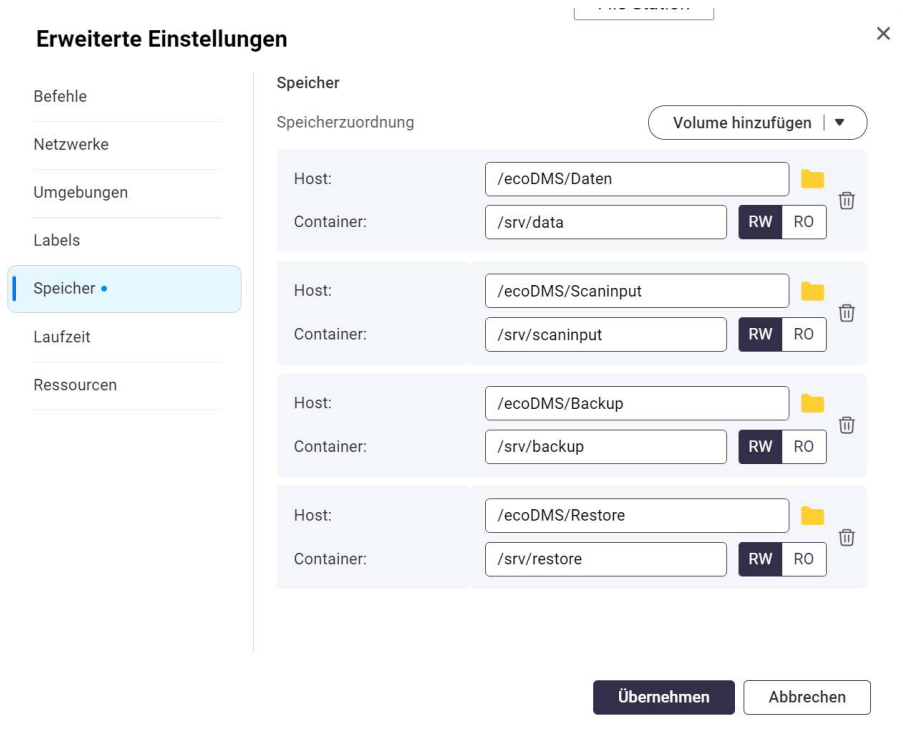


Figure 4.21: QNAP - Advanced Settings - Storage

4.3.6 Change Language (English)

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

```
Variable: LANG
Value: eng
```

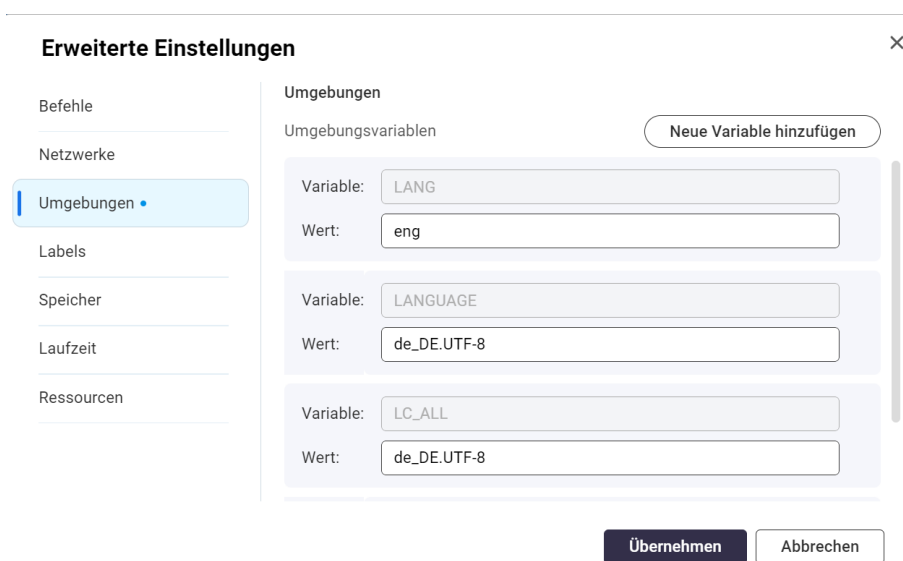
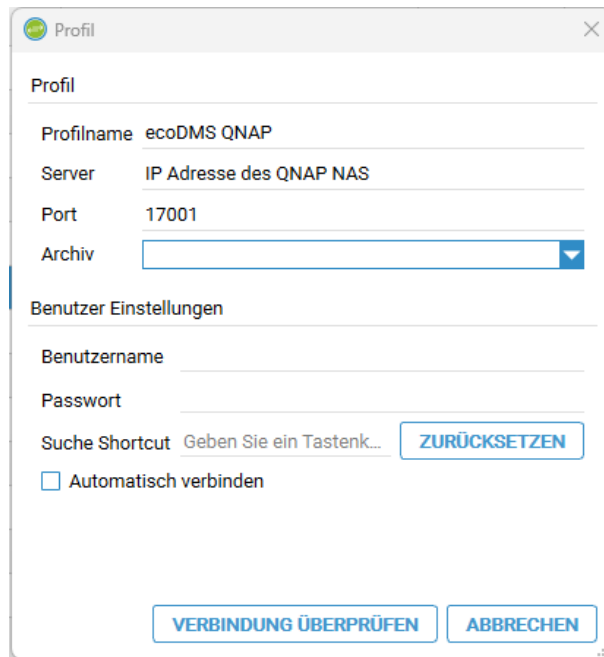


Figure 4.22: QNAP - Advanced Container Settings - Change Language

4.3.7 Start Container

Once you have created the container, it starts automatically.

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



Profil

Profilname ecoDMS QNAP

Server IP Adresse des QNAP NAS

Port 17001

Archiv

Benutzer Einstellungen

Benutzername

Passwort

Suche Shortcut Geben Sie ein Tastenk... ZURÜCKSETZEN

Automatisch verbinden

VERBINDUNG ÜBERPRÜFEN ABBRECHEN

Figure 4.23: QNAP - Connection Manager - Setup Connection

5 macOS

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

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

5.1 Upgrade

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

5.2 Installation

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

5.2.1 ecoDMS Client

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

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

4. Click "Continue" in the "Introduction Screen".

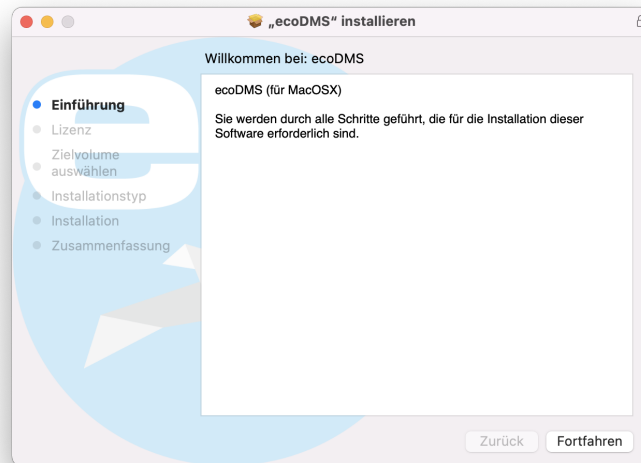


Figure 5.1: macOS Client: Introduction

5. The next steps are the language and the license agreements.

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

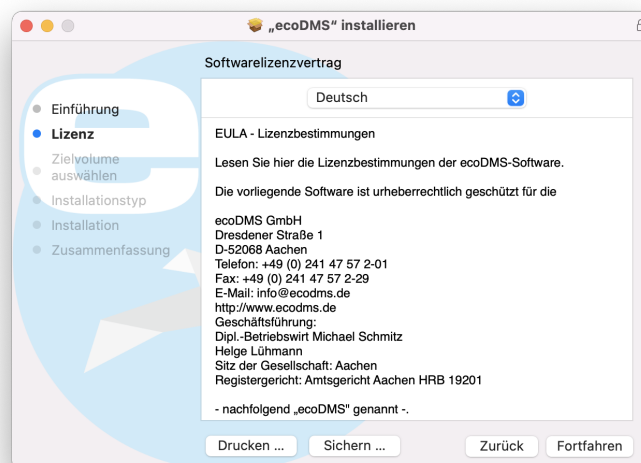


Figure 5.2: macOS Client: Language and License

6. Confirm the license agreement with "Agree".

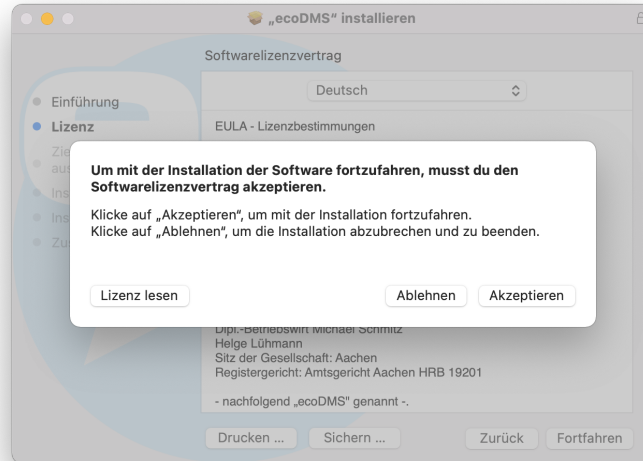


Figure 5.3: macOS Client: Accept License Agreement

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

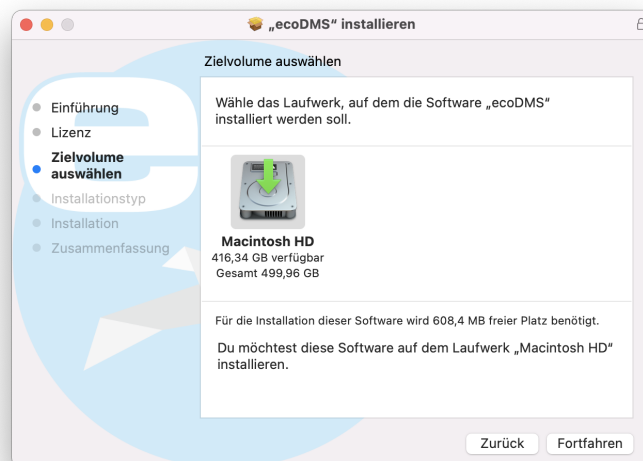


Figure 5.4: macOS Client: Installation Disk

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

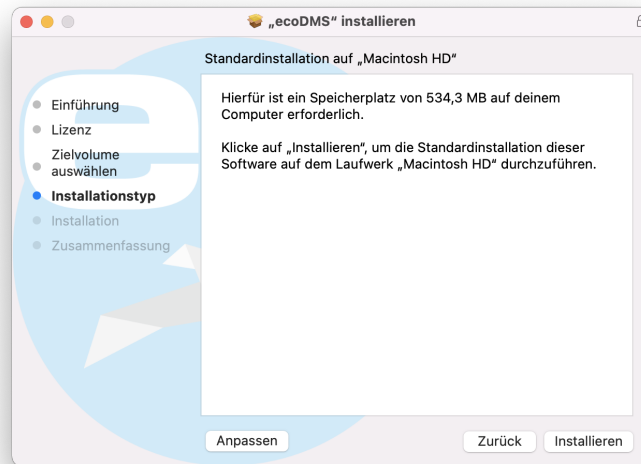


Figure 5.5: macOS Client: Installation

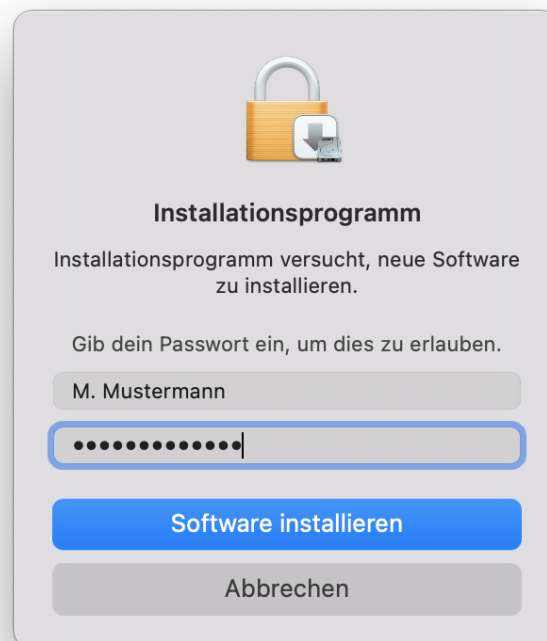


Figure 5.6: macOS Client: Enter Access Data

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

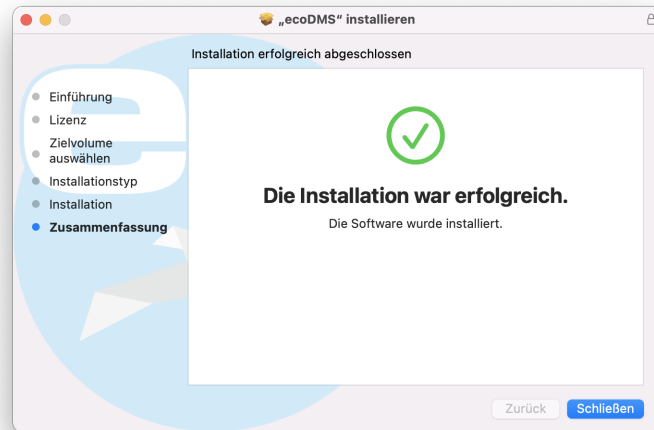


Figure 5.7: macOS Client: Installation Complete

5.3 Uninstall

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

5.3.1 ecoDMS Client

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

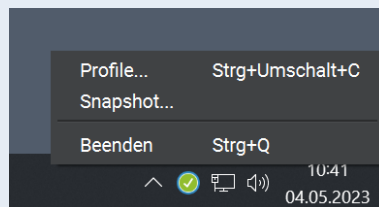


Figure 5.8: Please Exit Connection Manager

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

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

6 Login

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

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

7 Extensions

ecoDMS offers a number of addons and plugins to extend the system's features. These extension enable, for example, email archiving, task automation, or the integration of third party systems. In short: ecoDMS is a modular system that can be customized with addons and plugins to suit your needs.

This chapter describes the necessary steps for installing and uninstalling the available plugins and addons under the supported operating systems (refer to the system requirements). In addition, it features important information about the individual processes.

7.1 Installation (incl. WORKZ Migration)

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

7.1.1 Microsoft Office Add-in (2.1.2)

The ecoDMS Microsoft Office plugin allows you to save documents from Microsoft Office (Word, Excel, PowerPoint, and Outlook) straight to 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. The add-in is available for Windows.

7.1.1.1 Windows

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

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

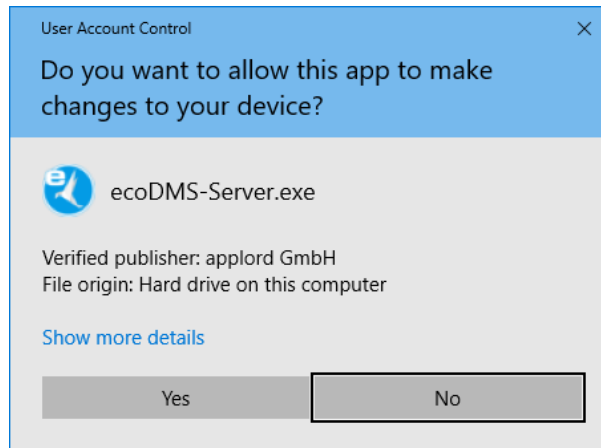


Figure 7.1: Windows Confirmation Prompt - Microsoft Office Add-in

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

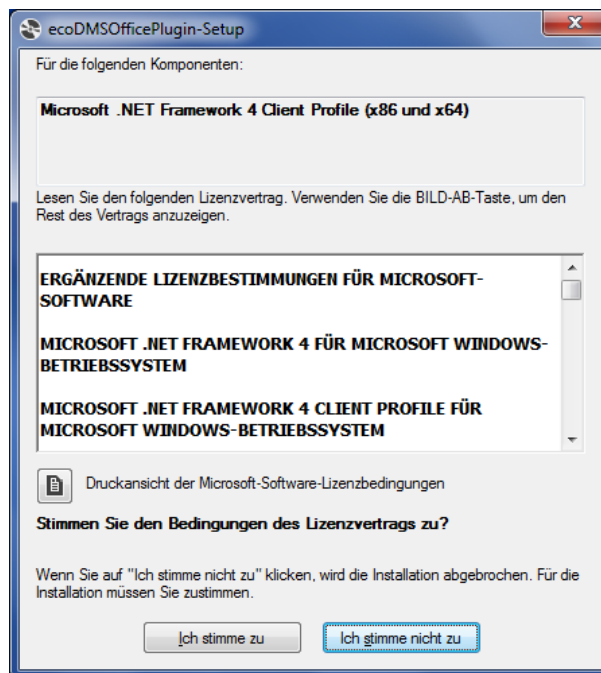


Figure 7.2: Microsoft Office Add-in - License: Framework

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

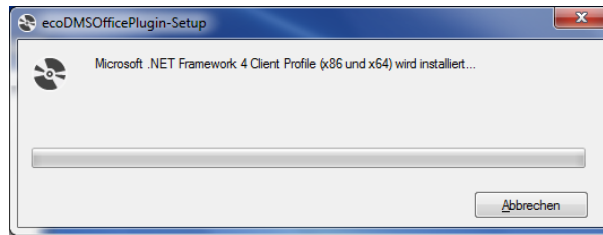


Figure 7.3: Microsoft Office Add-in - Installation Framework

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

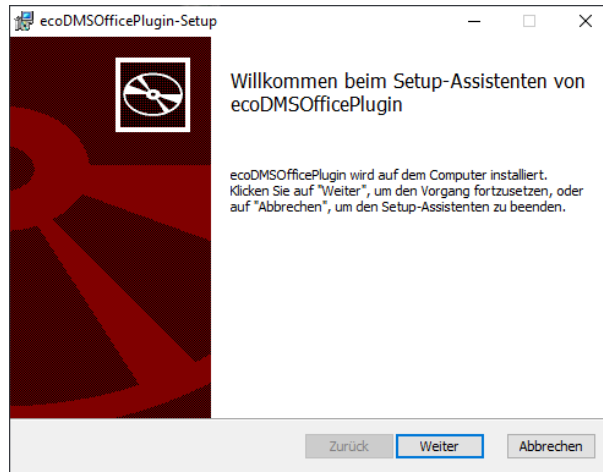


Figure 7.4: Microsoft Office Add-in - Start Setup Wizard

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

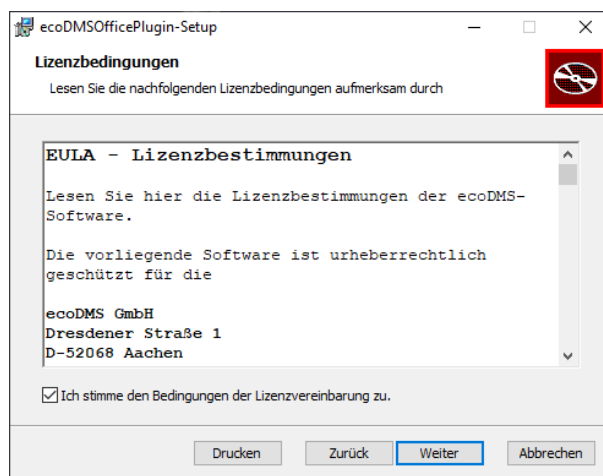


Figure 7.5: Microsoft Office Add-in - ecoDMS License Agreement

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

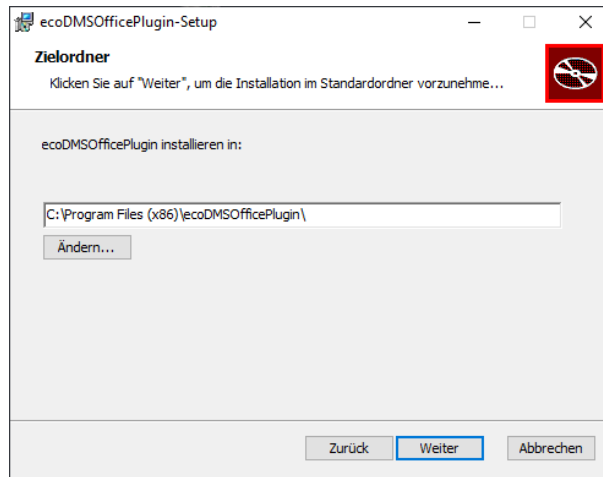


Figure 7.6: Microsoft Office Add-in - Installation Destination

11. Click "Install" to start the installation.

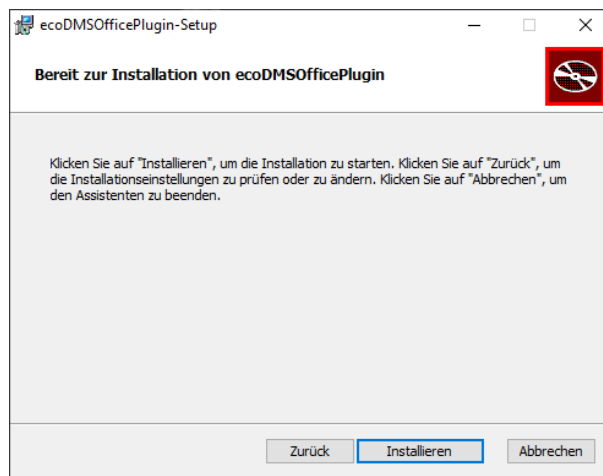


Figure 7.7: Microsoft Office Add-in - Start Installation

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

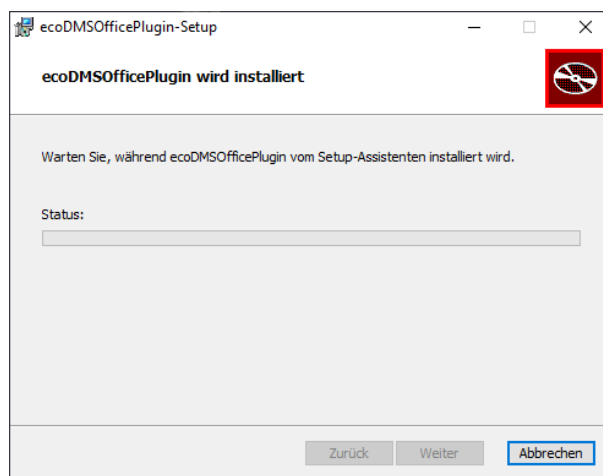


Figure 7.8: Microsoft Office Add-in - Installation

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

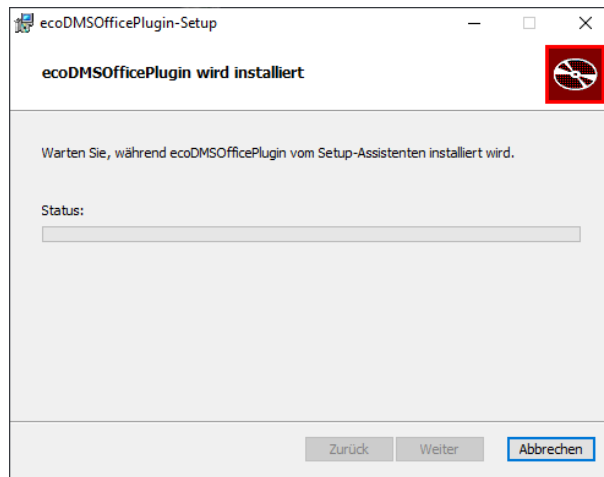


Figure 7.9: Microsoft Office Add-in - Finish Installation

14. You can restart the MS Office programmes now.

7.1.2 Libre- + OpenOffice Add-on (1.0.6)

This ecoDMS Office add-on enables you to save documents from LibreOffice and OpenOffice (Writer, Calc, and Impress) straight to 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. The add-in is available for Windows, Linux, and macOS.

7.1.2.1 Windows, Linux, macOS

The following explains how to uninstall the ecoDMS add-on for LibreOffice and Open Office under Windows, Linux, and macOS.

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

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

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

6. Confirm the message with "OK".

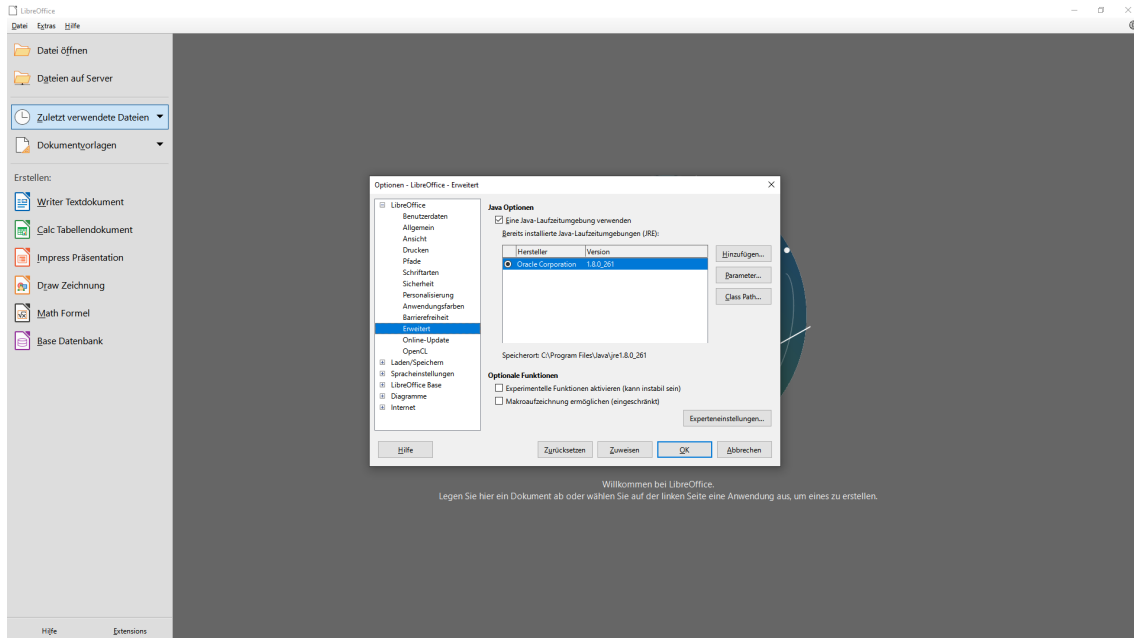


Figure 7.10: Enable Java in Office

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

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

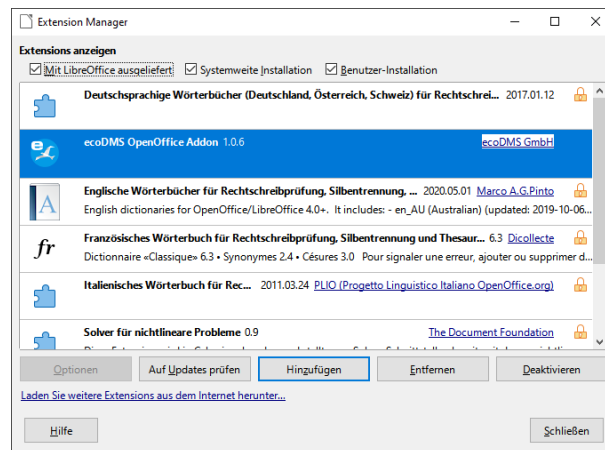


Figure 7.11: LibreOffice: Installation Complete

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

a) As an alternative you can use the new menu item "ecoDMS".

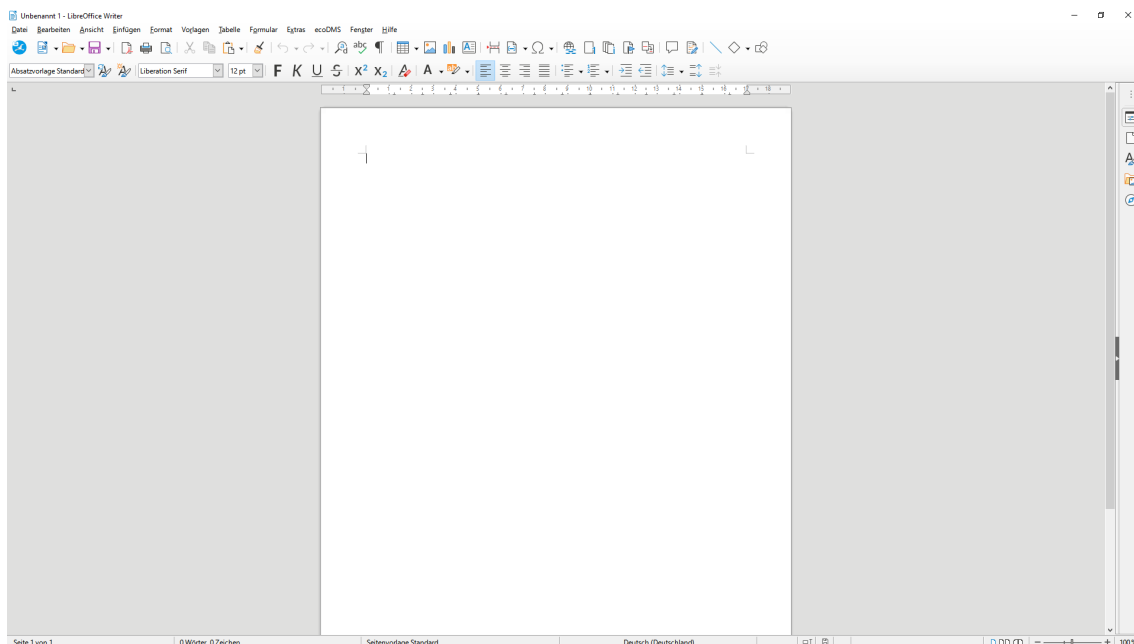


Figure 7.12: LibreOffice: ecoDMS Add-on (here: Writer)

7.1.3 Thunderbird Add-on (3.0.4 / 3.0.8)

Use the ecoDMS Thunderbird add-on archive incoming and outgoing emails from Thunderbird.

7.1.3.1 Windows, Linux, macOS

You can import this add-on in Thunderbird through the add-on manager. The following section describes how to install the ecoDMS Thunderbird Add-on under Windows, Linux distributions, and macOS.

1. Download the file for the Thunderbird add-on at ecodms.de

a) Please also note: The Thunderbird add-on requires the latest version of the ecoDMS Printer

2. If this is a ZIP-file, unzip it first
3. Start Thunderbird
4. Open the "Add-on Manager" in Thunderbird: Menu -> Add-ons
5. Now click the Gear icon and select "Install add-on from file..."

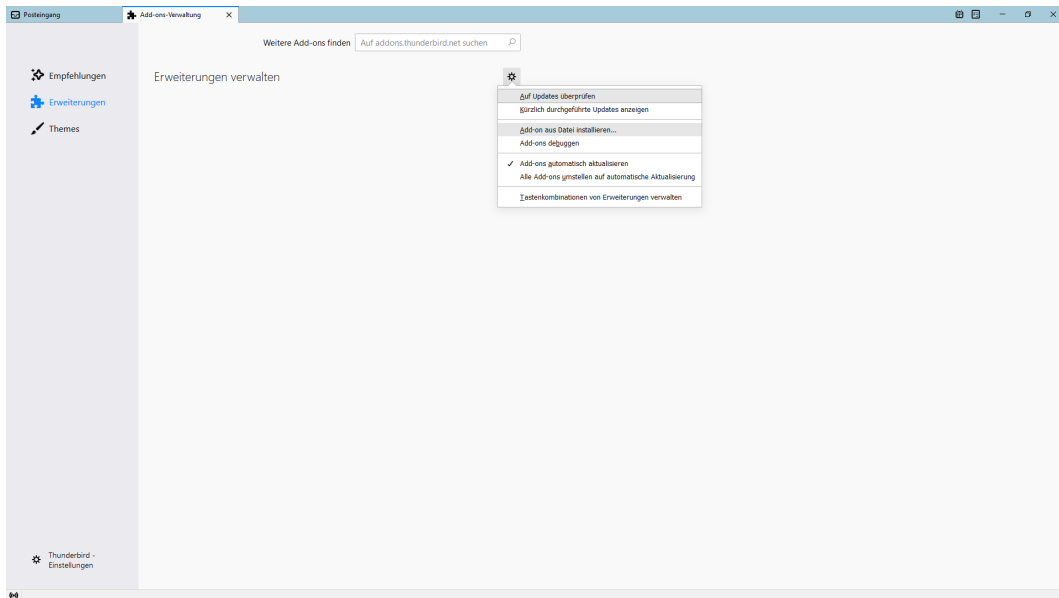


Figure 7.13: Thunderbird: Install Add-On from File

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

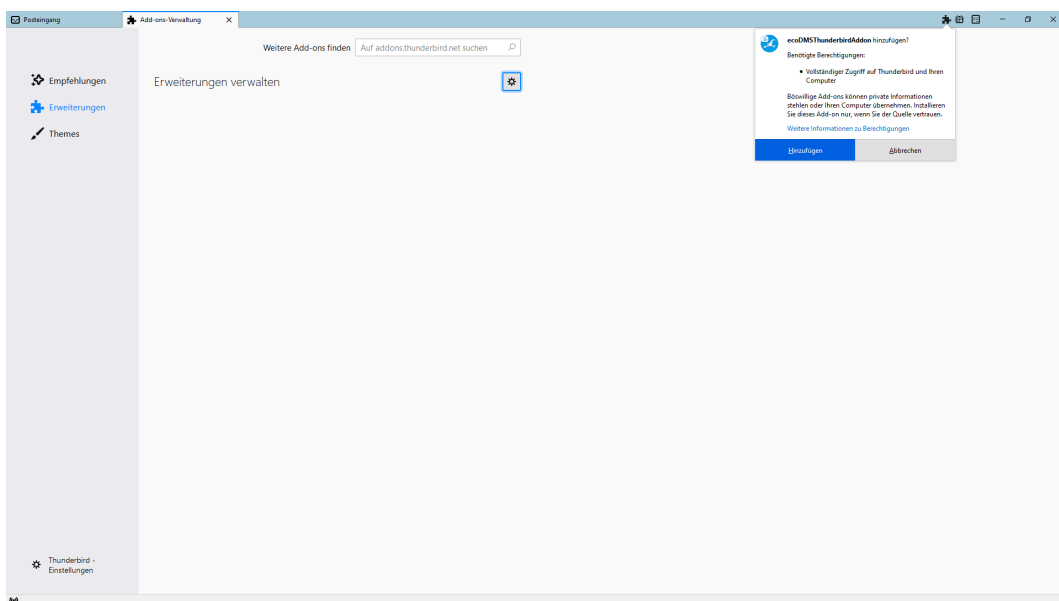


Figure 7.14: Thunderbird: Confirmation Prompt

8. The installation is now complete

a) We recommend you restart Thunderbird

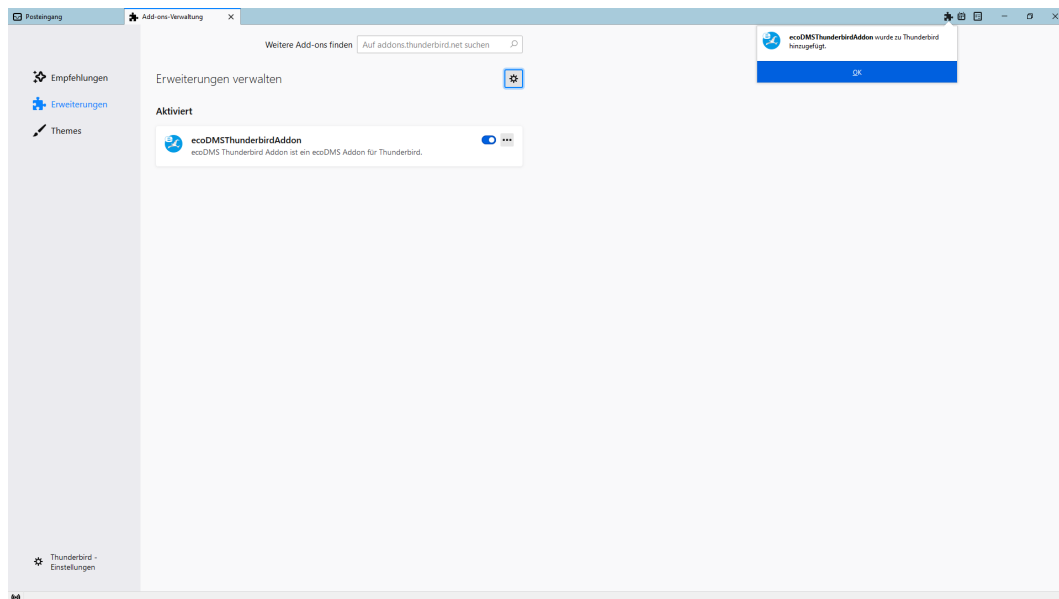


Figure 7.15: Thunderbird: Restart

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

7.1.4 ecoMAILZ Plugin (1.0.4)

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

ecoMAILZ 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.

7.1.4.1 Windows

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

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

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

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

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

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

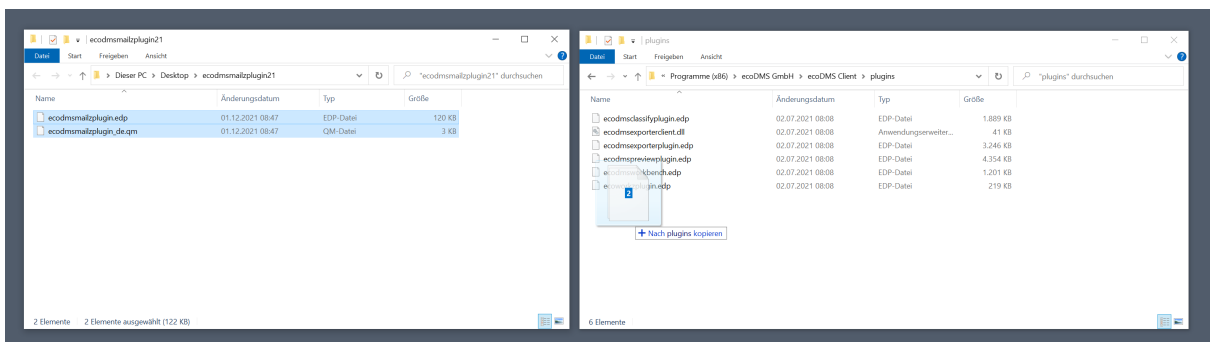


Figure 7.16: Install ecoMAILZ Plugin in ecoDMS - Copy Files to ecoDMS Plugin Folder

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

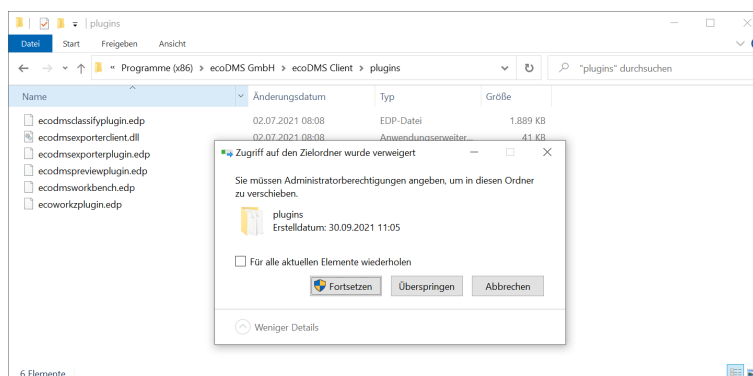


Figure 7.17: Install ecoMAILZ Plugin in ecoDMS - Copy files into ecoDMS Folder

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

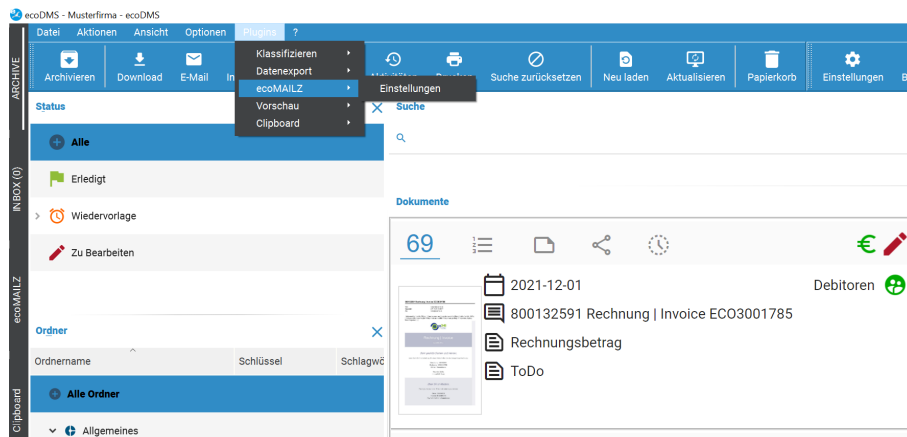


Figure 7.18: Install ecoMAILZ Plugin in ecoDMS - Display in ecoDMS (Configuration Prompt)

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

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

```
http://ecoMAILZ_IP_ADDRESS:Port
```

Example for local installation with default port:

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

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

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

8. ecoMAILZ in ecoDMS is now installed and configured.

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

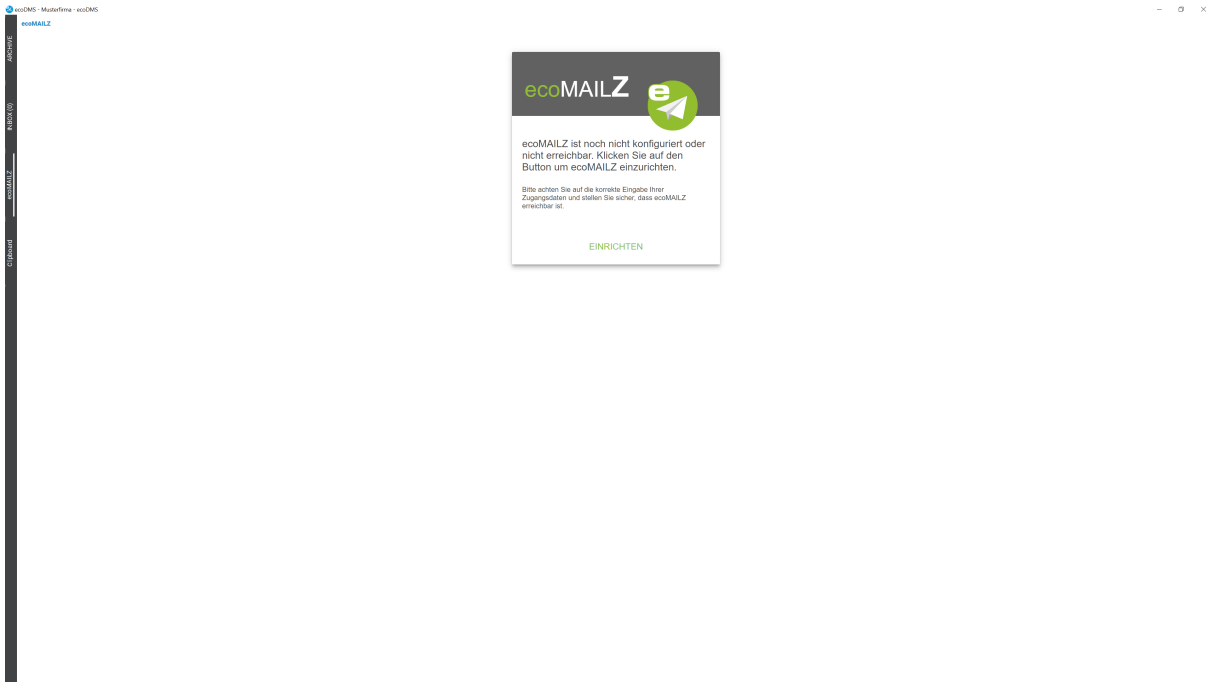


Figure 7.19: Install ecoMAILZ Plugin in ecoDMS - Display in ecoDMS (Configuration Prompt)

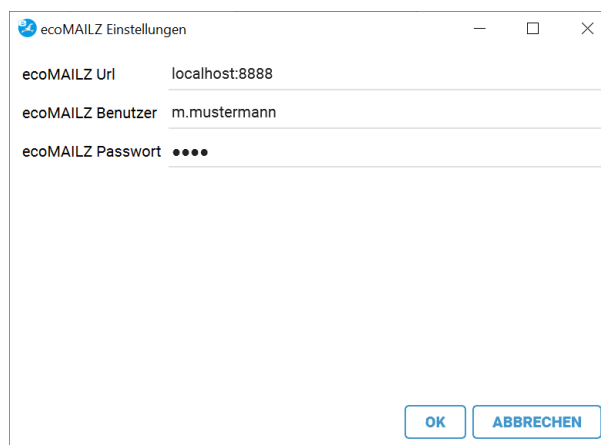


Figure 7.20: ecoMAILZ Plugin in ecoDMS - ecoMAILZ Settings (Here: Local Installation)

7.1.4.2 Linux

ecoMAILZ Plugin for the ecoDMS Document Management System

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

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

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

```
sudo apt-get install ecodmsmailzplugin
```
3. Confirm the displayed questions / warnings with YES by entering Y
[...]
[...]
[...]
a) This process may take a while.
4. Read the license agreement carefully and confirm.
 - Use the Tab key to skip to "OK" and confirm with "Enter".
5. The installation is executed. This operation may take a while.
6. Now restart the Connection Manager and the ecoDMS Client.
7. In ecoDMS (burns), an ecoMAILZ tab displays on the left-hand side.
 - a) You can find the ecoMAILZ settings in the main menu under "Plugins - ecoMAILZ".

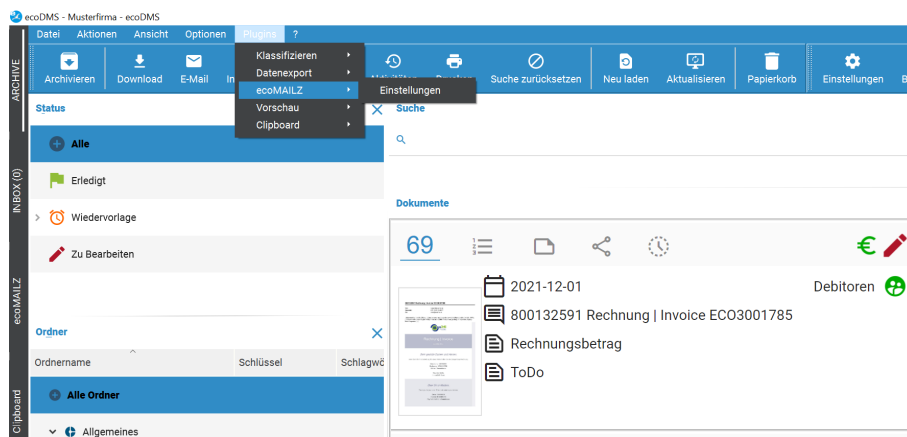


Figure 7.21: Install ecoMAILZ Plugin in ecoDMS - Display in ecoDMS (Configuration Prompt)

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

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

```
http://ecoMAILZ_IP_ADDRESS:Port
```

Example for local installation with default port:

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

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

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

9. ecoMAILZ in ecoDMS is now installed and configured.

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



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

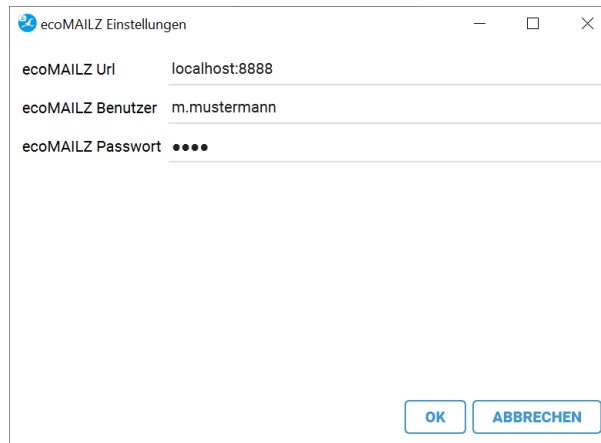


Figure 7.23: ecoMAILZ Plugin in ecoDMS - ecoMAILZ Settings (Here: Local Installation)

7.1.5 WORKZ Add-on (24.01)

To use the WORKZ add-on, make sure you refer to the installation and update notes in the WORKZ manual.

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

The ecoDMS WORKZ add-on is available as an option for automating recurring tasks in document management. You can define fixed processes and automate routines for document acknowledgement and approval. You can also automatically import files and documents from a specified folder into the file system in ecoDMS. Moreover, you can import emails with attachments to ecoDMS. Use the WORKZ add-on to configure intervals for automated document and email import. You can also trigger actions to follow the import, for example you can initiate an approval process. The WORKZ add-on requires an additional license for ecoDMS.

7.1.5.1 Migrate ecoWORKZ Build 22.08 or Earlier to WORKZ Add-on Build 23.01 or later

You must migrate existing file and email imports and acknowledgement and approval processes when upgrading from ecoWORKZ (ecoDMS build 22.08-1 and earlier) to the new WORKZ add-on (ecoDMS Build 23.01 or later). Note that following the migration, the WORKZ add-on is disabled and all imports and processes are stopped.

1. So you must activate the WORKZ add-on according to description in the WORKZ manual.
2. Then configure/edit the migrated file and email imports and acknowledgement and approval processes as required.
 - a) Note that open acknowledgement and approval processes will not be migrated and will be deleted.
 - b) The ecoWORKZ status will also be lost following migration.
3. To check whether the migration was successful, view the ecoWORKZ_migration log. You can find it in the ecoDMS directory in the “log” folder.

You cannot migrate a file or email import under the following circumstances:

- An ecoDMS status with a defined name in ecoWORKZ no longer exists, or there are too many
- An ecoDMS document type with a defined name in ecoWORKZ no longer exists, or there are too many
- An error occurs when configuring data (file import, classification)
- The same folder is already defined in another file import
- The settings or the validation of recurring imports are incorrect

The following circumstances prevent a migration of acknowledgement and approval processes:

- An ecoDMS status with a defined name in ecoWORKZ no longer exists, or there are too many
- An ecoDMS document type with a defined name in ecoWORKZ no longer exists, or there are too many
- An error occurs when configuring data

7.1.5.1.1 NAS Update of ecoWORKZ Build 22.08 or Earlier to WORKZ Add-on Build 23.01 or later When updating or installing to NAS, you must create two new folders:

1. Fileimport_call>> /srv/fileimport
2. Fileimport_move>> /srv/fileimport_move

7.1.5.1.2 Docker Update from ecoWORKZ Build 22.08 or Earlier to WORKZ Add-on Build 23.01 or later There are two options for updating to build 23.01 or later under Docker:

1. Deactivate the license before upgrading.
 - a) In this case, the Docker container does not need internet access or access to the ecoDMS license server during the update
2. Do not activate the license before upgrading
 - a) In this case, the Docker container must have internet access or access to the ecoDMS license server during the update.
3. When upgrading from version 23.01 or later to a later version, you no longer need to deactivate the license.

Restore a Backup from a Version Earlier than 23.01 to 23.01 or Later

1. To restore a backup of an earlier version before build 23.01, the Docker container must have internet access or access to the ecoDMS license server.
 - a) If the Docker container has no internet access or access to the ecoDMS license server, the license will be deactivated.
2. If you want to restore a backup from build 23.01 or later, you do not need to deactivate the license

7.1.5.2 NAS (Synology & QNAP)

- The WORKZ add-on does not require a separate installation on a NAS. It is activated with the ecoDMS license and you can test it without obligations in the trial version.
- **For the add-on to work on NAS systems, you must configure specified settings and create folders.**

1. When installing on a NAS, create two new mount paths in the advanced settings on the “Storage” tab:

```
Fileimport_call => /srv/fileimport
Fileimport_Verscmovehoben => /srv/fileimport_move
```

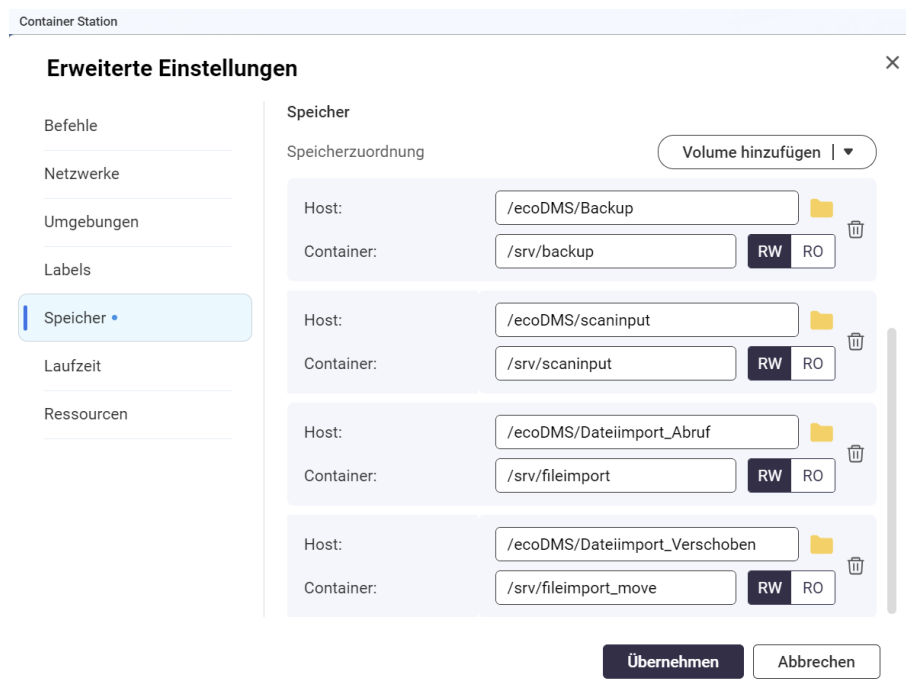


Figure 7.24: QNAP - Advanced Container Settings - WORKZ Add-on

7.1.5.3 Linux

1. The WORKZ add-on does not require manual installation. It is activated with the ecoDMS license and you can test it without obligations in the trial version.
2. **However, every folder created on a Linux system (Ubuntu, Debian) must have permissions for file import from the add-on:**
 - a) If this is not the case, an error message displays in the file import settings after you select the folder to let you know that you cannot use the folder because you have no permissions.

Give permissions to the folder for importing files from the add-on:

```
chmod 777 <Folder name>
```

7.1.5.4 Windows

1. The WORKZ add-on does not require manual installation. It is activated with the ecoDMS license and you can test it without obligations in the trial version.
2. You can start straight away under Windows. There are no further steps required.

7.1.5.5 macOS

1. The WORKZ add-on does not require manual installation. It is activated with the ecoDMS license and you can test it without obligations in the trial version.
2. You can start straight away under macOS. There are no further steps required.

7.2 Uninstall

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

7.2.1 Microsoft Office Add-in

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

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

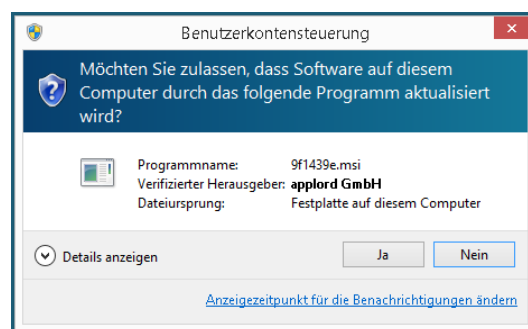


Figure 7.25: User Account Control – Microsoft Office Add-in

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

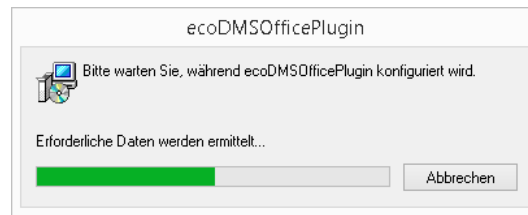


Figure 7.26: Microsoft Office Add-in - Uninstallation: Preparation & Execution

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

7.2.2 Libre- + OpenOffice Add-on

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

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

7.2.3 Thunderbird Add-on

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

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

7.2.4 ecoMAILZ Plugin

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

The following section describes how to uninstall the ecoMAILZ plug-in on the various operating systems.

7.2.4.1 Windows

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

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

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

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

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

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

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

7.2.4.2 Linux

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

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

8 Backup / Restore

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