



ecoDMS Build 24.02

WEB CLIENT

Imprint

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1 Manage Web Service / Web Client

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

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

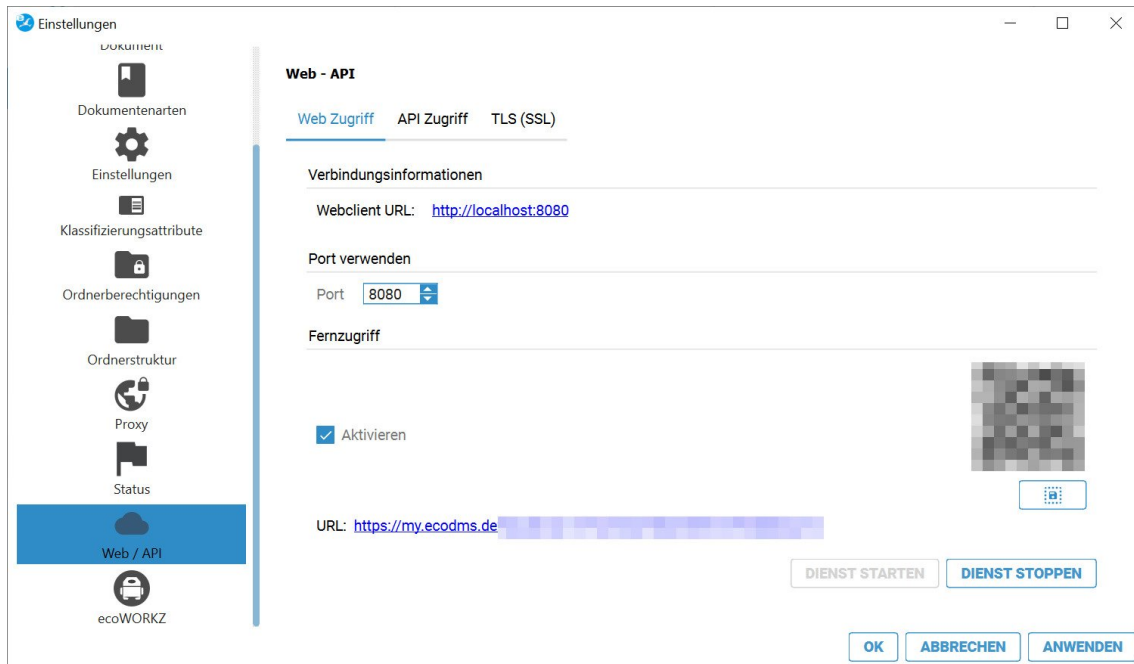


Figure 1.1: Settings - Web Access with Enabled Remote Access

1.1 Start Service

To start the web service, complete the following steps:

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

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

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

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

1.2 Stop Service

To stop the web service, complete the following steps:

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

2 Login and Logoff

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

2.1 Login

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

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

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

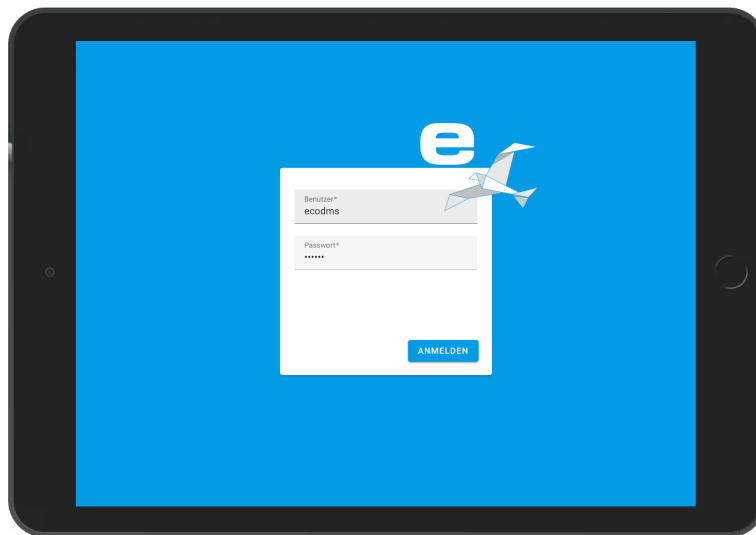


Figure 2.1: Web Client: Login (Here: Tablet)

2.1.1 Multi-Factor Authentication for Login

For specific details on multi-factor authentication (MFA), please refer to the ecoDMS manual!

Multi-factor authentication (MFA) increases the security of your ecoDMS user accounts by requiring an additional factor to verify the identity in addition to the password. This can be a code from an authentication app or an email. The input type depends on the respective profile settings.

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

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

2. Enter your regular ecoDMS user data in the login window.
 - a) **Username:** Enter your username
 - b) **Password:** Enter the password associated with the username
 - c) **MFA Code:** If MFA is enabled, the OTP code is also requested during web client login. Enter it here.
 - i. Depending on the setting, the code is provided either by authentication app or email.
 - d) **Login:** Click the Login button to start ecoDMS Web Client

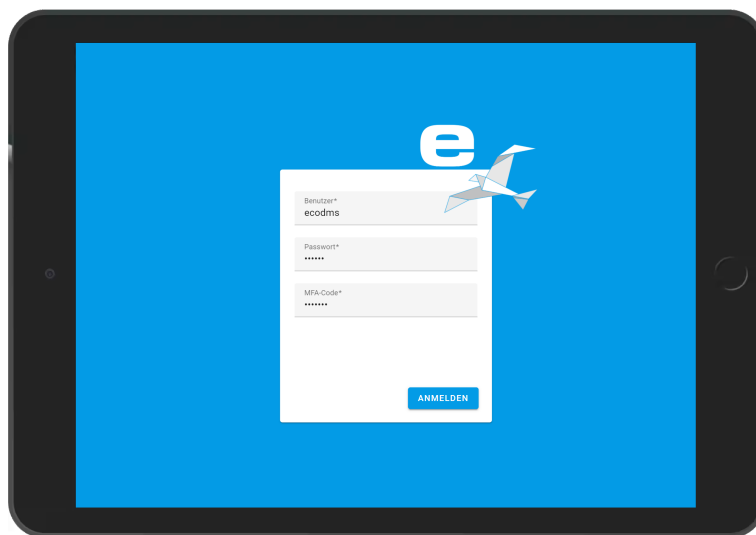


Figure 2.2: Webclient: Login with MFA Code (hier: Tablet)

2.2 Logoff

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

1. Click the User icon at the top right of the web client
2. Select "Logoff"
3. Your user is now logged off and you will return to the ecoDMS Web Client login page.

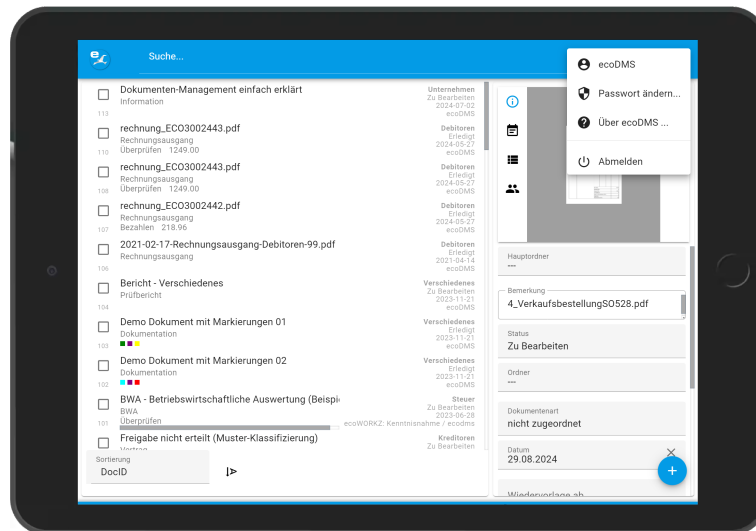


Figure 2.3: Web Client: Logoff (Here: Tablet)

2.3 Mobile Desktop Link (Mobile)

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

2.3.1 Android via Chrome

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

2.3.2 iOS via Safari

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

3 Archiving Documents

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

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

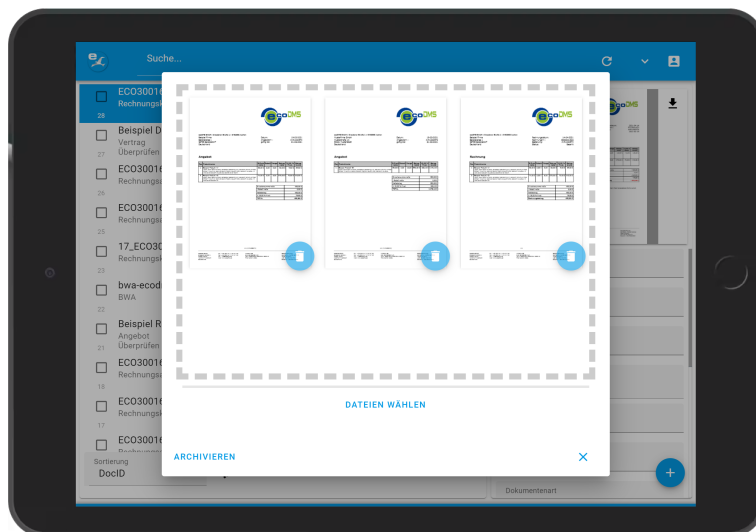


Figure 3.1: Archive Documents in the Web Client (Here: Tablet)

3.1 Computer / Laptop

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

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

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

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

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

3.2 Smart Phone / Tablet

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

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

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

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

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

4 Actions and View

The web client provides many ecoDMS actions / features.

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

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

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

4.1 Document Preview

- The preview displays only PDFs.
- Depending on the file size and volume, it may take some time for the documents to be displayed at this location.

4.1.1 Maximize Window

- The document preview window can be maximized by double-clicking, so the file is displayed in a larger view, making the content easier to read.
- By default, the window is smaller and located in a column along with the classification and document information, which are visible below the preview window.
 - A double-click will stretch the window to the full page height.
 - Another double-click will restore the window to its original size.

4.1.2 Zoom

In the preview window, you can zoom in on the displayed document as needed for better viewing.

- Zoom-In: The view is enlarged, and the document is zoomed in.
 - Access via the "Magnifying Glass with Plus" icon
 - Or use the mouse scroll wheel (scroll up)
- Zoom-Out: The view is reduced, and the document is zoomed out.
 - Access via the "Magnifying Glass with Minus" icon
 - Or use the mouse scroll wheel (scroll down)
- Fit to Window: The document is scaled to fit fully within the window, both in height and width.
 - Access via the "Home" icon



Figure 4.1: Icons - Zoom in (left), Zoom out (center), Fit to window (right)

4.1.2.1 Selection Zoom

The "Selection Zoom" feature allows you to mark and enlarge a specific area of a document in the preview window.

1. Activating the feature
 - a) The "Selection Zoom" feature is disabled by default.
 - b) Click on the "Selection Zoom" icon to activate the feature.
 - c) The icon turns red once the feature is activated.
2. Select and Zoom Area
 - a) Click and drag with the left mouse button to draw a rectangle in the document, marking the area to be zoomed in on.
 - b) The selected area will now be enlarged.



Figure 4.2: Icons - Selection zoom - disabled (left), enabled (right)

4.1.3 Page Navigation

For multi-page documents, you can flip through the individual pages to navigate between them.

- Flip Forward: Moves to the next page of the document.
 - Access via the right arrow icon

- Flip Backward: Moves to the previous page of the document.
 - Access via the left arrow icon

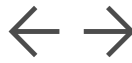


Figure 4.3: Icons - Scroll backward (left), Scroll forward (right)

4.1.4 Full Screen

To view the document in full screen mode in the preview window, proceed as follows:

- Click on the "Home" icon labeled "Full Screen" in the preview window.
- The document will now be displayed in full screen mode.



Figure 4.4: Icon - Full screen

4.2 Download Document

Archived documents can be downloaded from the ecoDMS WebClient and then opened.

1. Select the desired document
2. Click on the "Classification" icon in the preview area
3. Click on the download icon (arrow pointing down) next to the preview area



Figure 4.5: Icon - Download - Dokument herunterladen

4.3 Classify Document

- A preview image is only displayed for PDFs and files that have been archived via the ecoDMS plugins or the PDF/A printer.
- The permissions and access conditions for classification in the web client are the same as in the ecoDMS client.
- For detailed information about the individual classification attributes and their assignment, please refer to the ecoDMS manual.

With the "Classify Document" feature, you can assign important storage information to each archived file, such as the virtual target folder, document type, status, responsibilities, and many other attributes. Classification organizes documents efficiently and makes them easy to retrieve, either as an alternative to or in addition to full-text search.

Steps for classification:

1. Select Document: Choose the document you want to classify.
2. Open Classification: Click on the "Classification" icon in the preview area.
3. Assign Attributes: Perform the classification for the desired attributes, e.g., select a folder, choose document type, set status.
4. Save Classification: Save the changes by clicking the Save icon.
 - a) Note: The Save icon is only visible when changes have been made within the classification.

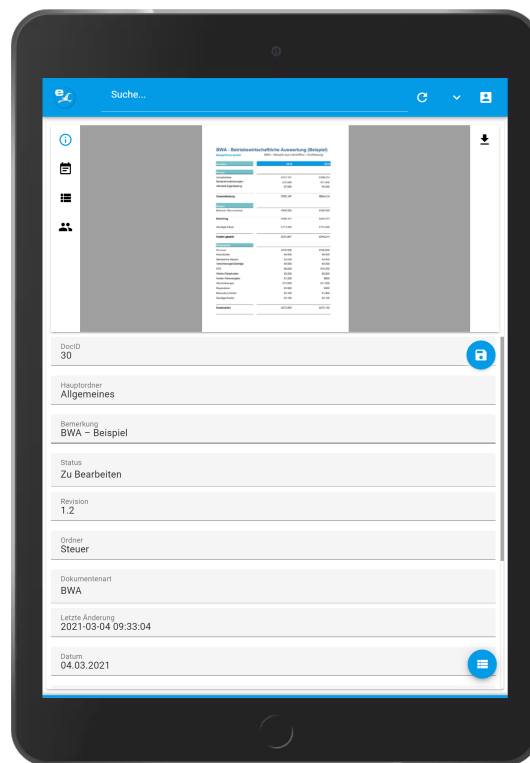


Figure 4.6: Classify Documents in the Web Client (here: Tablet)

4.4 Create Notes

- All users with access to the document in ecoDMS can edit, add to and delete the notes at any time.
- ecoDMS automatically creates a full-text index of the note texts. This ensures that notes are included when executing a full-text search.

You can also add notes to archived documents. The function is similar to the famous yellow sticky notes.

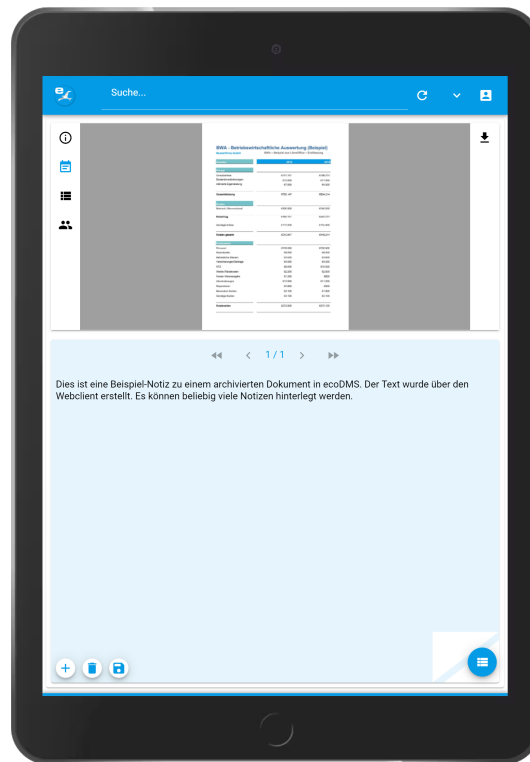


Figure 4.7: Create Notes in the Web Client (Here: Tablet)

4.4.1 Write New Note

To write a note, complete the following steps:

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

4.4.2 Edit Note

To edit a note, complete the following steps:

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

4.4.3 Delete Note

To delete a note, complete the following steps:

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

4.5 Document Versioning

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

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

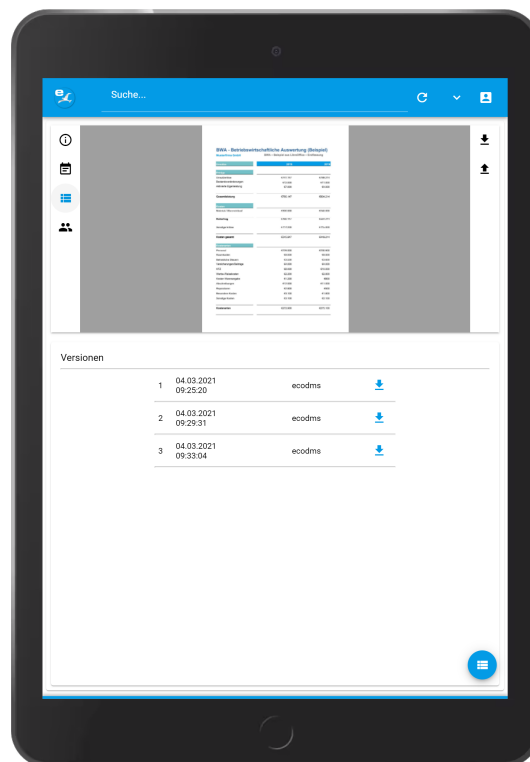


Figure 4.8: Document Versions in the Web Client (Here: Tablet)

4.5.1 Add New Version

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

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

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

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

4.5.2 Download Version

Users can access files and the individual versions if they have the permission to access the file and Version Management. Depending on the file, the versions are available in the original and in PDF/A format.

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

4.6 Permissions

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

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

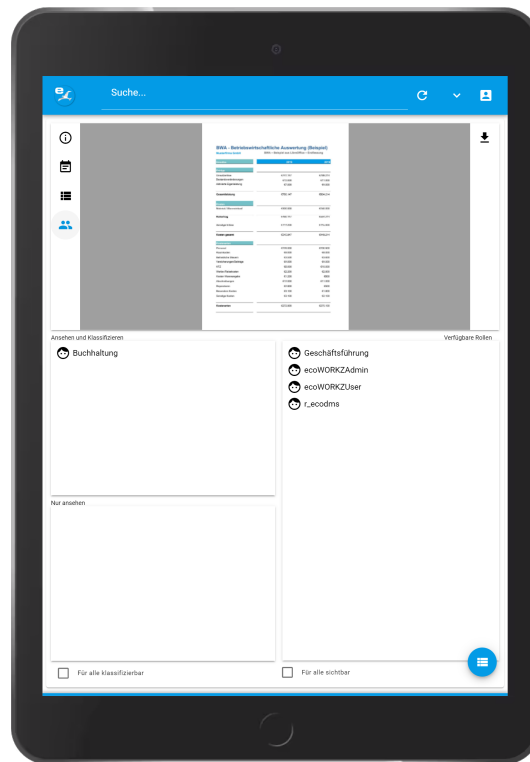


Figure 4.9: Document Permissions in the Web Client (Here: Tablet)

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

- You assign permissions with drag and drop. The window on the right displays all available users. These can be dragged to the two boxes on the left. This specifies who may view a document and who may also classify the document.
- Please note that at least one user must be entered in the "View and Classify" box.

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

5 Search, Filters and Favorites

To retrieve the archived documents and information, ecoDMS has various search and filter options. You can save recurring search queries as favorites.

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

5.1 Full-Text Search

Use search terms to perform a quick search of the contents, metadata, classification attributes and notes of the archived documents with the full-text search of ecoDMS. The following common search methods are available in the web client for the full-text search. Here are a few examples on how to use the full-text search.

1. Simple full-text search

```
Invoice example company
```

2. Wildcard search

```
Me?er
```

```
Test*
```

3. Fuzzy search

```
Meier~
```

4. Boolean operators

```
Sample OR Demo
```

```
Sample AND Demo
```

```
Sample NOT Demo
```

5.2 Advanced Search

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

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

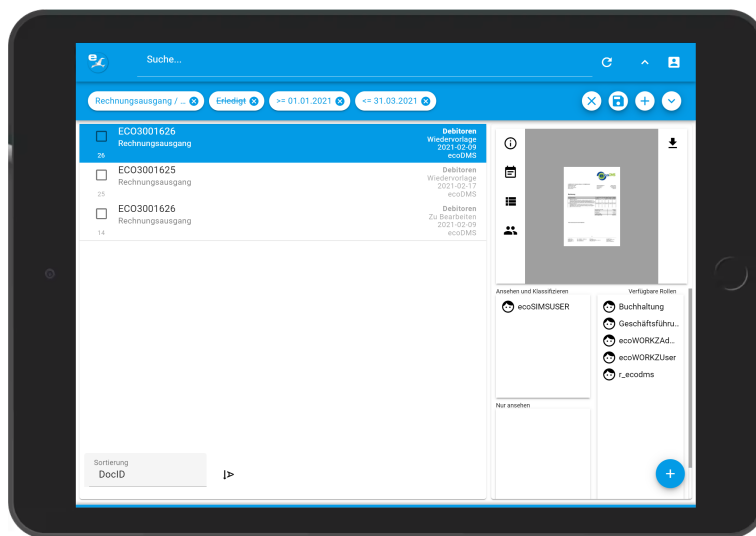


Figure 5.1: Advanced Search of Documents in the Web Client (Here: Tablet)

1. Click the Expand icon to the right of the search box (arrow pointing downwards) to expand the advanced search area
2. Use the Plus icon to select the search criteria
 - a) Displays all searchable attributes and values you can select. Select an entry from the list
 - b) Specify the operator for the search. Depending on the field, the operators you can select vary. The following operators are available:
 - i. contains
 - ii. does not contain
 - iii. greater than / equal
 - iv. greater than
 - v. is
 - vi. is not
 - vii. smaller / equal

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

5.3 Favorites

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

You can save recurring search queries as favorites.

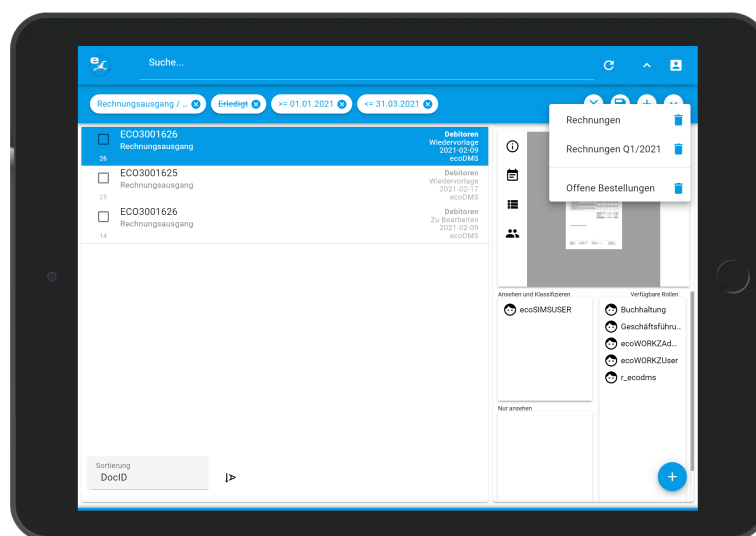


Figure 5.2: Document Search via Saved Favorite in the Web Client (Here: Tablet)

5.3.1 Search with Favorite

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

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

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

5.3.2 Save Favorite

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

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

5.3.3 Delete Favorite

To irrevocably delete a favorite, complete the following steps:

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

6 Inbox

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

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

6.1 Start Inbox

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

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

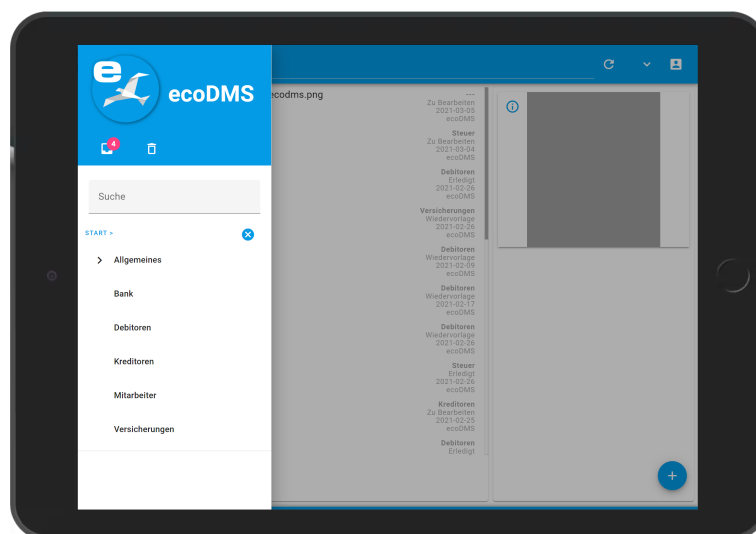


Figure 6.1: Drawer with Link to Inbox in the Web Client (Here: Tablet)

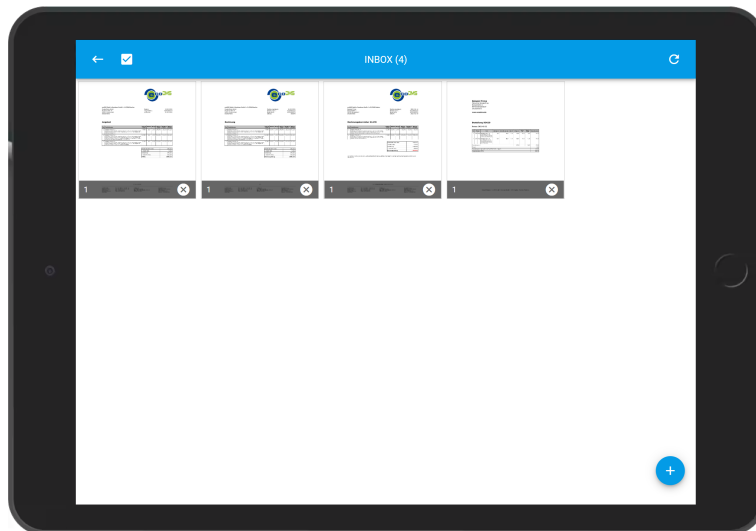


Figure 6.2: Inbox Start Window with Document Overview (Here: Tablet)

6.2 Upload Documents

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

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

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

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

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

6.3 Classify and Archive Document

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

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

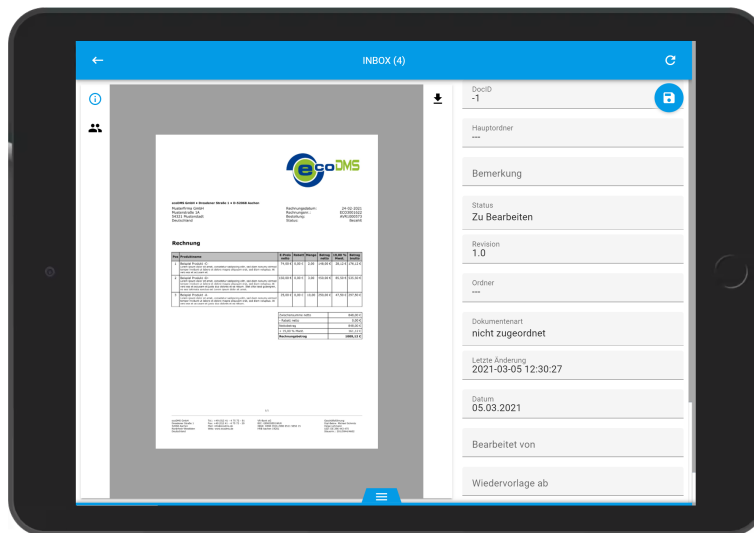


Figure 6.3: Classify Scanned Documents in the Inbox of the Web Client (Here: Tablet)

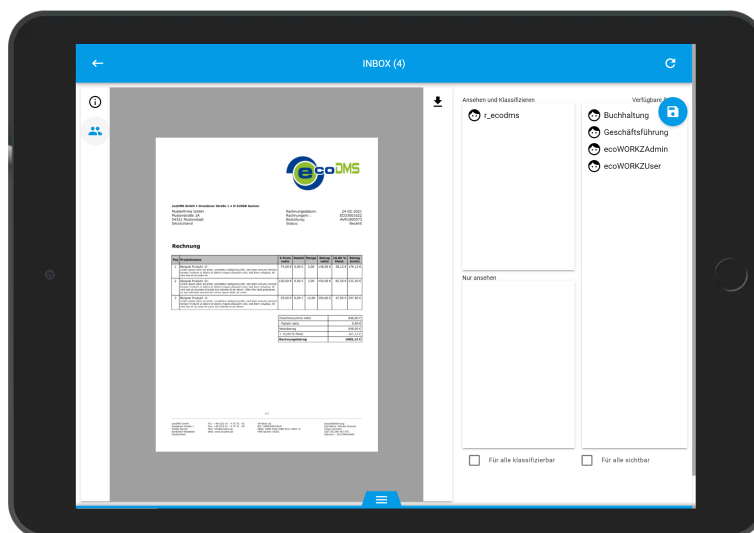


Figure 6.4: Assign Permissions for Scanned Documents in the Inbox from the Web Client (Here: Tablet)

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

- To ensure that the documents can only be viewed and edited by authorised persons, ecoDMS offers the assignment of separate access permissions for each document. This protects the privacy of documents.
- You assign permissions with drag and drop. The window on the right displays all available users. These can be dragged to the two boxes on the left. This specifies who may view a document and who may also classify the document.
- Please note that at least one user must be entered in the "View and Classify" box.

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

7 Delete Documents

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

The web client has restricted access to the ecoDMS trash.

7.1 Open and Close Trash

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

1. Slide out the drawer by clicking the ecoDMS logo in the top left corner
2. Click the blue Trash icon to open the trash
 - a) The icon turns red and indicates that you can only see the documents in the trash
3. Click the red Trash icon to exit the recycle bin
 - a) The icon is now blue and indicates that you can see the documents from the standard view again

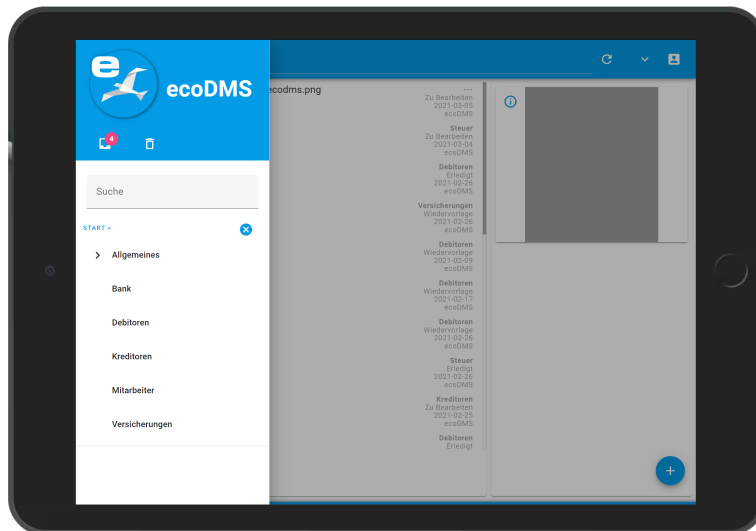


Figure 7.1: Drawer with Link to Trash in the Web Client (Here: Tablet)

7.2 Move Documents to Trash

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

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

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

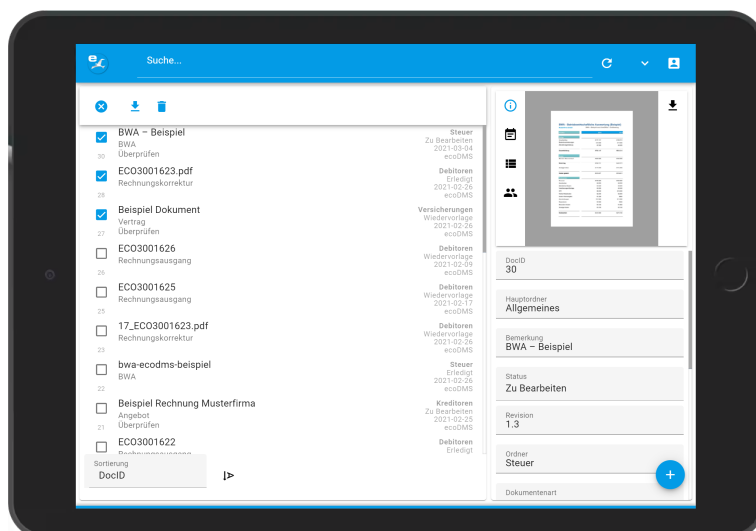


Figure 7.2: Move Selected Documents to Trash (Here: Tablet)

7.3 Restore Documents from Trash

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

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

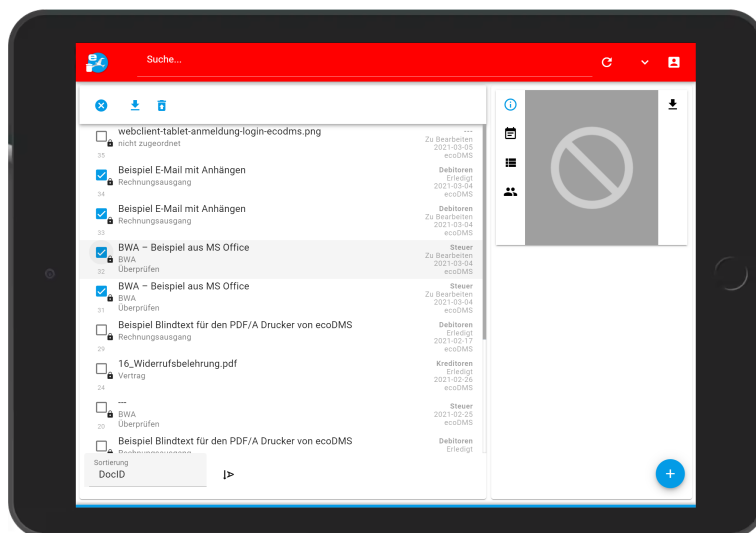


Figure 7.3: Restore Selected Documents From Trash (Here: Tablet)

8 Sort

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

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

9 WORKZ Add-on (Optional Extension)

- You need to purchase a license for the WORKZ add-on, but you can also test it in the ecoDMS trial version for free and without any obligation in the desktop client.
- Please enter a valid licence for the WORKZ add-on in order to use it in the web client.
- It is an optional extension for the document management system.
- **The activation of the WORKZ add-on and the description of the full range of features including configuration is described in the ecoDMS manual.**

The WORKZ add-on is an optional extension for the ecoDMS document management system. It allows you to automate recurring document management tasks, such as

- acknowledgment and approval of documents (ecoDMS Desktop Client + Web Client)
- digital stamp for process documentation (ecoDMS Desktop Client + Web Client)
- document and file import from the file system (ecoDMS Desktop Client)
- email import including attachments (ecoDMS Desktop Client)

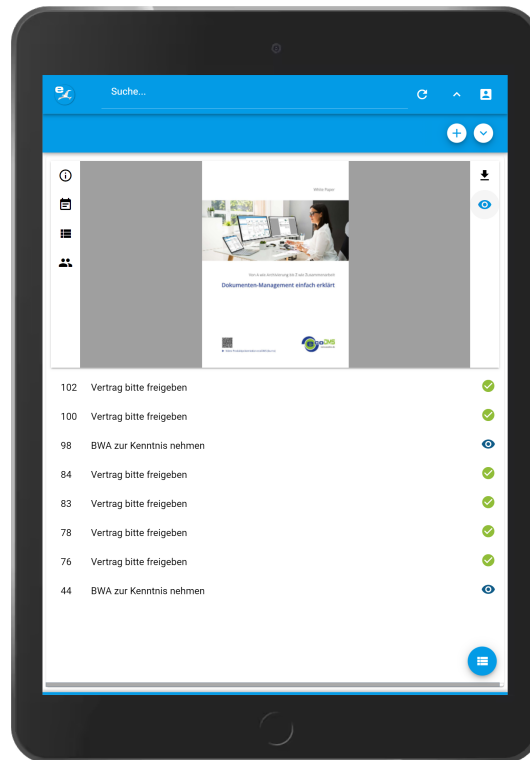


Figure 9.1: WORKZ Add-on in Web Client - Todo List in Preview Window (here: Tablet)

9.1 Acknowledgement

Please note the following information for the ecoWORKZ version:

- PDF files are only included when executing an acknowledgement or approval process is executed.
- Once a process was started, it may take several minutes until the acknowledgements and approvals appear in the task list of the responsible user.
- If multiple users or groups are involved in a process, acknowledgements and approvals appear in their task list as soon as the previous user or group has finished their task. The order of the assigned users is determined by the process settings.

Use the WORKZ add-on in ecoDMS to pass business PDF files to the responsible staff for acknowledgement. This helps you digitalize and automate your acknowledgement processes.

9.1.1 Configure Acknowledgements

To configure an acknowledgement process, switch to the ecoDMS Desktop Client and follow the steps for this process according to the ecoDMS manual.

9.1.2 Acknowledge

To acknowledge a PDF, complete the following steps:

1. Select any document in the web client and click on the “eye icon” in the preview window that appears.
2. A list of all available WORKZ tasks appears
3. Click on the corresponding acknowledgement to start the WORKZ process
4. **Document:** For PDF files, ecoDMS displays a document preview.
5. **Task:** Process details display above the document
6. **Apply My Stamp:** If you are working with a versionable PDF file, you can apply a digital stamp. A digital stamp on the document identifies the process, the user, the type of response, and date and time.
7. To finalize and save the process, click "Acknowledge"
8. The add-on automatically applies the classification attributes you assigned to the process, as soon as the process has been completed by all responsible users
9. The entry automatically disappears from the list of your processes once it has been processed
10. The response is documented in the history
11. If you applied a stamp, ecoDMS creates a new version of this document

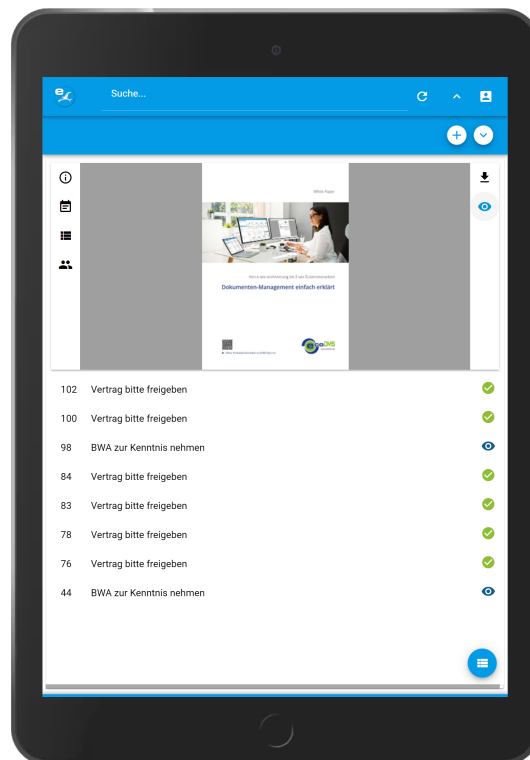


Figure 9.2: WORKZ Add-on - Task Overview in ecoDMS Web Client - Acknowledgements and Approvals

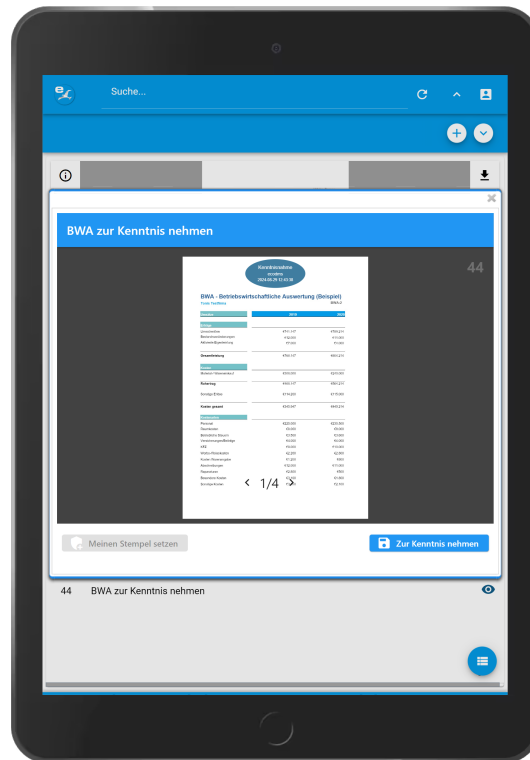


Figure 9.3: WORKZ Add-on - Acknowledge and Apply Stamp (Here: Tablet)

9.2 Approval

Please note the following information for the ecoWORKZ version:

- PDF files are only included when executing an acknowledgement or approval process is executed.
- Once a process was started, it may take several minutes until the acknowledgements and approvals appear in the task list of the responsible user.
- If multiple users or groups are involved in a process, acknowledgements and approvals appear in their task list as soon as the previous user or group has finished their task. The order of the assigned users is determined by the process settings.

Send business-relevant PDF files to the responsible staff members for approval via the WORKZ add-on. This is how you can digitalize and automate approval processes.

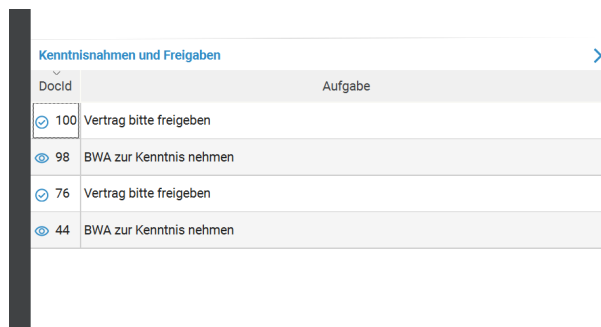
9.2.1 Configure Approval

To configure an approval process, switch to the ecoDMS Desktop Client and follow the steps for this process according to the ecoDMS manual.

9.2.2 Approve

To approve a document, complete the following steps:

1. Select any document in the web client and click on the “eye icon” in the preview window that appears.
2. A list of all available WORKZ tasks appears
3. Click on the corresponding approval to start the WORKZ process
4. **Document:** For PDF files, ecoDMS displays a document preview.
5. **Task:** Process details display above the document
 - a) **Approve:** Click this radio button to approve the document
6. **Apply My Stamp:** If you are working with a versionable PDF file, you can apply a digital stamp. The stamp documents the response to the task, which user executed the process and when.
7. To finalize and save the process, click "Execute"
8. The add-on automatically applies the classification attributes you assigned to the process, as soon as the process has been completed by all responsible users
9. The entry automatically disappears from the list of your processes once it has been processed
10. The response is documented in the history
11. If you applied a stamp, ecoDMS creates a new version of this document



DocId	Aufgabe
100	Vertrag bitte freigeben
98	BWA zur Kenntnis nehmen
76	Vertrag bitte freigeben
44	BWA zur Kenntnis nehmen

Figure 9.4: WORKZ Add-on - Task Overview in ecoDMS Client - Acknowledgements and Approvals

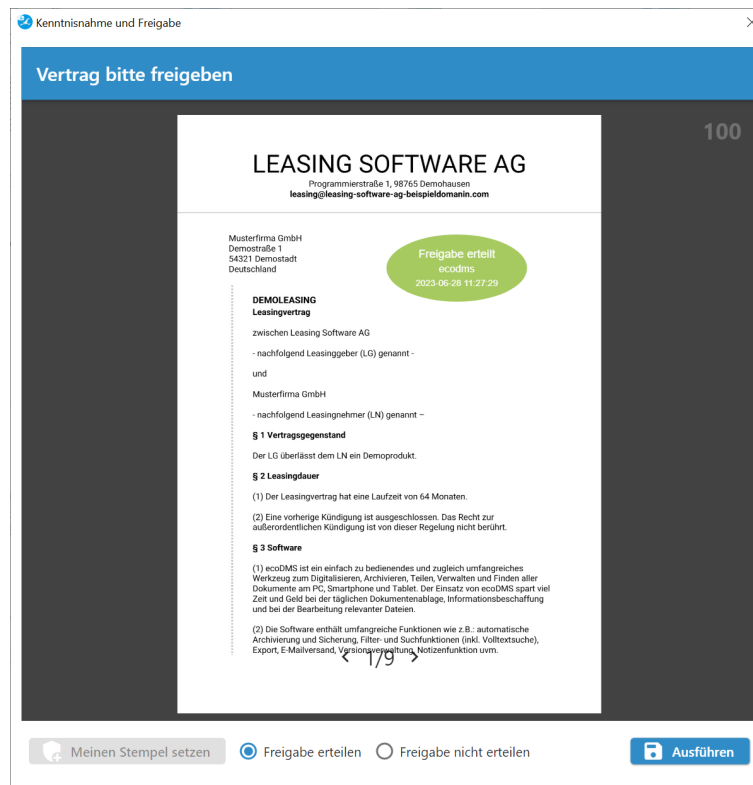


Figure 9.5: WORKZ Add-on - Approve and Apply Stamp (Here: Versionable File)

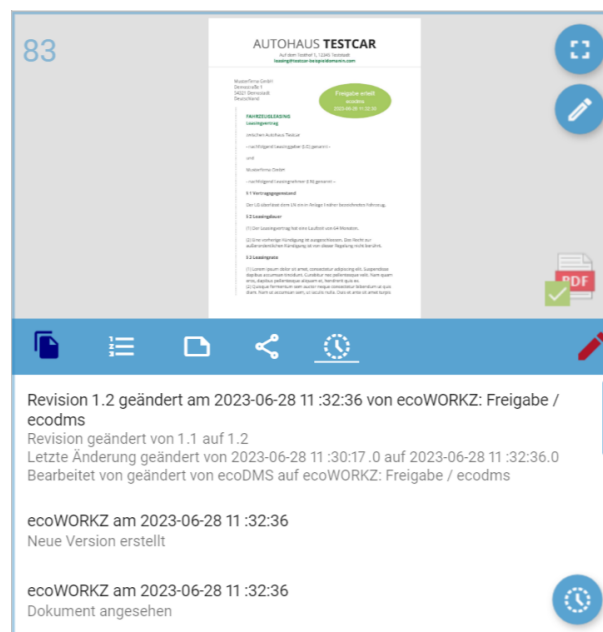



Figure 9.6: WORKZ Add-on - Approval History

9.2.3 Reject Approval

If you do not want to approve a document, complete the following steps:

1. Select any document in the web client and click on the "eye icon" in the preview window that appears.
2. A list of all available WORKZ tasks appears

3. Click on the corresponding approval to start the WORKZ process
4. **Document:** Für PDF-Dateien wird nun eine Dokumentenvorschau angezeigt
5. **Task:** Über dem Dokument werden Details zum Ablauf angezeigt
 - a) **Reject Approval:** Click this radio button to reject the approval for this document
 - i. Rejected because: If you do not approve a document, you must enter a reason. The reason is saved in the document history under "Processed by" when the process is finalized.
6. **Apply My Stamp:** If you are working with a versionable PDF file, you can apply a digital stamp. The stamp documents the response to the task, which user executed the process and when.
7. To finalize and save the process, click "Execute"
8. The add-on automatically applies the classification attributes you assigned to the process, as soon as the process has been completed by all responsible users
9. The entry automatically disappears from the list of your processes once it has been processed
10. The response is documented in the history
11. If you applied a stamp, ecoDMS creates a new version of this document



DocId	Aufgabe
100	Vertrag bitte freigeben
98	BWA zur Kenntnis nehmen
76	Vertrag bitte freigeben
44	BWA zur Kenntnis nehmen

Figure 9.7: WORKZ Add-on - Task Overview in ecoDMS Client - Acknowledgements and Approvals

Kennntnahme und Freigabe

Vertrag bitte freigeben

100

LEASING SOFTWARE AG
 Programmierstraße 1, 98765 Demohausen
 leasing@leasing-software-ag-beispieldomain.com

Musterfirma GmbH
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 54321 Demostadt
 Deutschland

DEMOLASING
 Leasingvertrag

zwischen Leasing Software AG
 - nachfolgend Leasinggeber (LG) genannt -
 und
 Musterfirma GmbH
 - nachfolgend Leasingnehmer (LN) genannt -

§ 1 Vertragsgegenstand
 Der LG überlässt dem LN

Begründung
 Konditionen entsprechen nicht der Anforderung

ausserordentlichen Kündigung ist von dieser Regelung nicht berührt.

§ 3 Software
 (1) ecoDMS ist ein einfach zu bedienendes und zugleich umfangreiches Werkzeug zum Digitalisieren, Archivieren, Teilen, Verwalten und Finden aller Dokumente am PC, Smartphone und Tablet. Der Einsatz von ecoDMS spart viel Zeit und Geld bei der täglichen Dokumentenablage, Informationsbeschaffung und bei der Bearbeitung relevanter Dateien.
 (2) Die Software enthält umfangreiche Funktionen wie z.B.: automatische Archivierung und Sicherung, Filter- und Suchfunktionen (inkl. Volltextsuche), Export, E-Mailversand, Vertragsgegenstände, Notizenfunktion usw.

Meinen Stempel setzen ☐ Freigabe erteilen ☒ Freigabe nicht erteilen ☐ Ausführen

Figure 9.8: WORKZ Add-on - Reject Approval with Reason and Stamp (Here: Versionable File)

100

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 leasing@leasing-software-ag-beispieldomain.com

Musterfirma GmbH
 Demostraße 1
 54321 Demostadt
 Deutschland

DEMOLASING
 Leasingvertrag

zwischen Leasing Software AG
 - nachfolgend Leasinggeber (LG) genannt -
 und
 Musterfirma GmbH
 - nachfolgend Leasingnehmer (LN) genannt -

§ 1 Vertragsgegenstand
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 (2) Die Software enthält umfangreiche Funktionen wie z.B.: automatische Archivierung und Sicherung, Filter- und Suchfunktionen (inkl. Volltextsuche), Export, E-Mailversand, Vertragsgegenstände, Notizenfunktion usw.

Revision 1.5 geändert am 2023-06-28 11:29:17 von ecoWORKZ
 Bemerkung geändert von Leasingvertrag Autohaus Testcar (Musterdokument) auf Freigabe nicht erteilt (Muster-Klassifizierung)
 Revision geändert von 1.4 auf 1.5
 Bearbeitet von geändert von ecoWORKZ: Freigabe nicht erteilt / Ablehnungsgrund: Konditionen entsprechen nicht der Anforderung / ecodms auf ecoWORKZ

Revision 1.4 geändert am 2023-06-28 11:29:17 von ecoWORKZ: Freigabe nicht erteilt / Ablehnungsgrund: Konditionen entsprechen nicht der Anforderung / ecodms
 Revision geändert von 1.3 auf 1.4
 Letzte Änderung geändert von 2023-06-28 11:23:50.0 auf 2023-06-28 11:29:17
 Bearbeitet von geändert von ecoDMS auf ecoWORKZ: Freigabe nicht erteilt / Ablehnungsgrund: Konditionen entsprechen nicht der Anforderung / ecodms

Figure 9.9: WORKZ Add-on - Rejected Approval History

9.3 Digital Stamp

- You can apply a stamp when approving or acknowledging a document.
- The document to be processed must be a PDF file which is approved for version management in ecoDMS.
- The PDF document must not be finalized in the ecoDMS version control.
- You must be able to add new versions.

You can use a digital stamp on a versionable document

- to document the response to the task (acknowledged, approved, not approved)
- and which user executed the process
- and when (date + time).

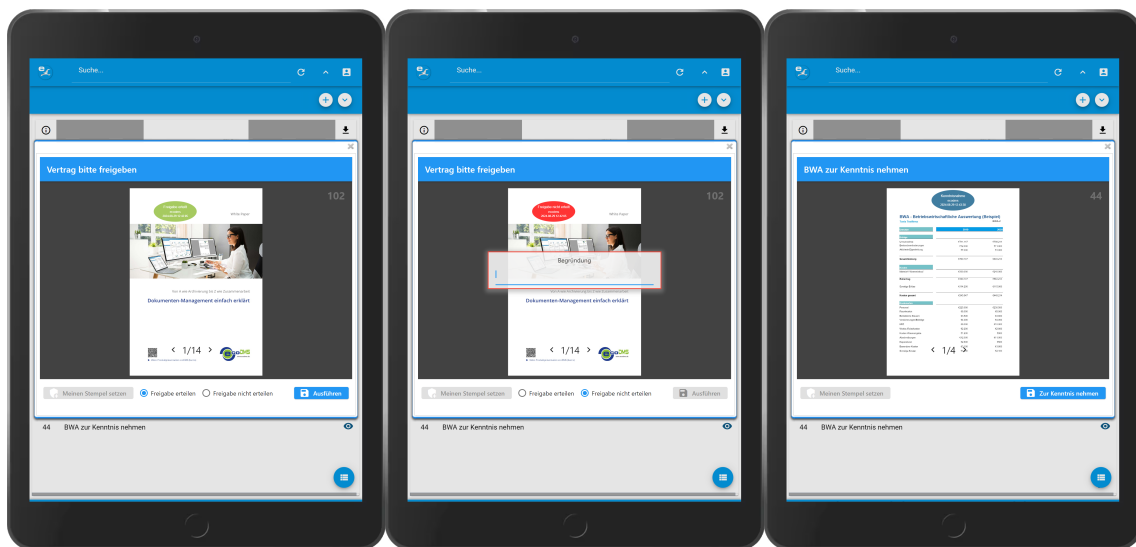


Figure 9.10: Stamp for Approvals and Acknowledgements

10 Login Credentials

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