ecoDMS (burns) Build 26.01

Manual

Date: 9th October 2026 V. 10:35am:EN

Imprint

Software: ecoDMS (burns)

Build: 26.01

Manual Date: 9th October 2026

Creator / Author: ecoDMS GmbH · Dresdener Straße 1 · 52068 Aachen · Germany

Website: `www.ecodms.de`

Email: info@ecodms.de

Company's registered office: Aachen

Register Court: District Court of Aachen 19201

Management: Thomas Uber, M.Sc. and Benedikt Weber

Important Information

This manual supplied by ecoDMS GmbH is protected by copyright law. Any use of text and illustrations, particularly reproduction, which requires the translation or import into electronic systems, in whole or in part, requires the prior written approval by ecoDMS GmbH, Dresdener Straße 1, 52068 Aachen. Please note that the violation of copyright law is an offence. NO GUARANTEE. All technical information and screen shots in this manual have been prepared with great care. Nevertheless, errors cannot be entirely excluded. ecoDMS GmbH neither provides any guarantee nor accepts any legal responsibility or liability for consequences resulting from incorrect information. The author welcomes any suggestions for improvement or information regarding errors.

Contents

1 Getting started with ecoDMS (burns) 23
1.1 Installation as standalone or network solution . . . 23
1.2 First login and server connection . . . 24
1.3 User management and initial setup of structures . . . 25
1.4 Archiving documents in ecoDMS . . . 26
1.4.1 Scan Process . . . 26
1.4.2 Archive & Classify Digital Files . . . 27

2 License Activation + Software Status 28
2.1 Activate License via Settings dialog . . . 29
2.2 Update License (Enhancement, Extension, Add-ons) . . . 30
2.3 Activate Licenses (ecoDMS without Internet Access) . . . 31
2.4 Deactivate License . . . 32
2.5 License Details and Validity . . . 33
2.6 Status of Software and License . . . 33

3 Icon Overview 36
3.1 Connection Manager . . . 36
3.2 Inbox . . . 36
3.3 File . . . 37
3.4 Activities . . . 38
3.5 View . . . 38
3.6 Options . . . 39
3.7 Classification . . . 39
3.8 Data Export . . . 39
3.9 Versions . . . 39
3.10 Preview Window . . . 40
3.11 Trash . . . 40
3.12 E-Invoices . . . 40
3.13 Resubmissions . . . 41
3.14 Layout: Table + Cards . . . 41
3.15 WORKZ Add-on . . . 41
3.15.1 Email Import . . . 41
3.15.2 File Import . . . 42

4 Layout + Document Overview 43
4.1 Document View (Layout) . . . 43
4.1.1 Card View: The Modern Display in Cards . . . 43
4.1.1.1 Zoom Levels . . . 44
4.1.1.1.1 First Zoom Level . . . 44
4.1.1.1.2 Second Zoom Level . . . 45
4.1.1.1.3 Third Zoom Level . . . 46
4.1.1.1.4 Fourth Zoom Level . . . 47
4.1.1.2 Sort Card View . . . 48
4.1.1.3 Table View: The Classic Display . . . 49
4.1.2 Configure Table . . . 50
4.1.2.1 Hide Columns . . . 50
4.1.2.2 Show Columns . . . 50
4.1.2.3 Adjust Columns to Content . . . 51
4.1.2.4 Adjust Columns to Content (Automatic) . . . 51
4.1.2.5 Show All Columns . . . 51
4.1.3 Sort Table . . . 51
4.2 Highlight Unread Documents . . . 51
4.3 Configure Toolbars . . . 52
4.3.1 Create New Toolbar . . . 52
4.3.2 Delete Toolbar . . . 53
4.3.3 Add Toolbar Actions / Icons . . . 53
4.3.4 Remove Toolbar Actions / Icons . . . 53
4.3.5 Change the Order of Toolbar Icons/Actions . . . 53
4.3.6 Restore All . . . 53
4.4 Manage Desktop . . . 54
4.4.1 Save Desktop Settings . . . 54
4.4.2 Load Desktop Settings . . . 54
4.4.3 Reset Desktop . . . 54
4.4.4 Reload Desktop . . . 54
4.4.5 Minimise / Maximise / Restore Client . . . 55
4.5 Windows / Area Visibility . . . 55
4.5.1 Hide Windows . . . 55
4.5.2 Show Windows . . . 55
4.6 Show/Hide Notifications . . . 56

5 Login, Connection Manager 57
5.1 Opening the Connection Manager . . . 57
5.2 Exit Connection Manager . . . 58
5.3 Profile Icons - Description . . . 59
5.4 Client-Server Communication . . . 59
5.5 Access from Outside . . . 59

5.6 Create Profiles and Log In . . . 60
5.7 Connect Profile . . . 61
5.8 Multi-Factor Authentication for Login . . . 62
5.8.1 Set up the Authentication App . . . 62
5.8.2 Display Activation Barcode . . . 62
5.8.3 Connect Automatically . . . 63
5.8.4 Connect Manually . . . 63
5.9 Disconnect Profile . . . 64
5.10 Edit Profiles . . . 65
5.11 Delete Profile . . . 65
5.12 Change Password . . . 66
5.13 Open ecoDMS . . . 66
5.14 Exit ecoDMS . . . 66

6 Users, Groups, Passwords 67
6.1 Permissions . . . 67
6.1.1 System Permissions . . . 68
6.1.2 Assign Permissions via dialog . . . 70
6.1.3 Delete Permissions via dialog . . . 70
6.1.4 Assign Permissions via Drag & Drop . . . 70
6.1.5 Delete Permissions Directly . . . 71
6.2 User Management . . . 71
6.2.1 Create New User . . . 72
6.2.2 Multi-Factor Authentication (MFA) . . . 73
6.2.2.1 Enable MFA . . . 73
6.2.2.2 Generate MFA Barcodes . . . 74
6.2.3 Edit User . . . 74
6.2.4 Copy User . . . 75
6.2.5 Erase User . . . 76
6.3 LDAP / Active Directory Management . . . 77
6.3.1 LDAP/ Active Directory Open dialog . . . 77
6.3.2 Create / Edit LDAP Profile . . . 78
6.3.3 Create /Edit Active Directory Profile . . . 80
6.4 Custom Groups (Roles) . . . 82
6.4.1 Create Custom Group . . . 82
6.4.2 Assign Users to Group . . . 83
6.4.3 Delete Users from Group . . . 83
6.4.4 Delete Custom Groups . . . 84
6.4.5 Example: Custom Groups . . . 84
6.5 Change Passwords . . . 84
6.5.1 Change Password As Administrator . . . 85
6.5.2 Change Your User Password . . . 85

6.5.3 System Administrator: Change Password . . . 86
6.5.4 User is locked: Reset Password . . . 86

7 Settings 88
7.1 Benutzer Sitzungen . . . 88
7.1.1 Aktive Benutzersitzungen . . . 89
7.1.1.1 Sitzung beenden: . . . 89
7.1.2 Verbundene mobile Geräte (ecoDMS ScanApp) . . . 90
7.1.2.1 Geräteverbindung aktivieren & trennen: . . . 90
7.1.3 Aktualisieren . . . 90
7.2 Document . . . 90
7.2.1 Settings . . . 91
7.2.2 Global File Name . . . 92
7.2.2.1 Add Selected Attribute . . . 92
7.2.2.2 Add Text Field . . . 92
7.2.3 Version File Name . . . 93
7.2.3.1 Add Selected Attribute . . . 93
7.2.3.2 Add Text Field . . . 94
7.2.4 Duplicate Detection . . . 95
7.2.5 Classification Detection . . . 96
7.2.5.1 Date Detection . . . 97
7.3 Document Types & Retention Periods . . . 98
7.3.1 Examples of Typical Document Types . . . 99
7.3.2 Practical Example: Interaction of Classification and Full-Text Search . . . 99
7.3.3 Create New Document Type . . . 100
7.3.4 Retention Period . . . 100
7.3.4.1 Create a Retention Period . . . 101
7.3.5 Classification Settings . . . 102
7.3.5.1 Set Configuration . . . 102
7.3.6 Rename Document Type . . . 102
7.3.7 Delete Document Type . . . 103
7.3.8 Assign Icons . . . 103
7.4 Settings . . . 104
7.4.1 General . . . 104
7.4.1.1 Display Background Image in the Document View . . . 105
7.4.1.2 Hide System Roles in Classification dialog . . . 105
7.4.1.3 Maximum File Size for Preview . . . 105
7.4.1.4 Layout Color . . . 106
7.4.1.5 Links . . . 107
7.4.1.6 Archiving As A Version With The ALT Key Pressed . . . 109
7.4.1.7 Email - Set and Use Default Client . . . 109
7.4.1.8 Display Resubmissions at Startup . . . 110

7.4.2 File Indexing . . . 110
7.4.2.1 Indexing Status . . . 110
7.4.2.2 OCR Options . . . 111
7.4.2.3 OCR Language Support . . . 111
7.4.3 Scaninput . . . 112
7.4.4 Lizenz . . . 112
7.4.5 Backup . . . 112
7.4.6 Email / SMTP Settings . . . 112
7.5 Classification Attributes . . . 113
7.5.1 PDF Highlight Tracking . . . 114
7.5.2 Free Text . . . 115
7.5.3 Combobox . . . 115
7.5.3.1 Combobox: Sort Values . . . 116
7.5.3.2 Combobox: Delete Values . . . 116
7.5.4 Checkbox . . . 116
7.5.5 Date Field . . . 117
7.5.6 Numeric Field . . . 117
7.5.7 Activate / Deactivate Attributes . . . 118
7.5.8 Rename Attributes . . . 118
7.6 Folder Permissions . . . 118
7.6.1 Assign Folder Permissions . . . 119
7.6.2 Remove Folder Permissions . . . 120
7.6.3 User Example . . . 120
7.7 Folder Structure . . . 121
7.7.1 Creating Main Folders . . . 122
7.7.2 Convert Existing Folder to Main Folder . . . 123
7.7.3 Creating Subfolders . . . 123
7.7.4 Using and Capturing Tags . . . 124
7.7.4.1 Automatic Categorization of the Folder (Tags) . . . 124
7.7.4.2 Manual Categorization of the Folder (Tags) . . . 125
7.7.5 Rename Folder . . . 125
7.7.6 Delete Folder . . . 125
7.7.7 Change Key . . . 126
7.7.8 Import a Folder Structure . . . 126
7.7.8.1 Valid XML Items . . . 126
7.7.8.2 XML Sample . . . 126
7.7.9 Assign Icons . . . 127
7.7.10 Inactive Folder (Hide Folder) . . . 128
7.7.11 Default Structure . . . 128
7.7.11.1 Create a New Folder in the Default Structure . . . 128
7.7.11.2 Import a Default Structure . . . 129
7.7.11.2.1 Valid XML Items . . . 129

7.7.11.2.2 XML Sample . . . 129
7.7.11.3 Delete Folder from Default Structure . . . 130
7.7.12 Folder Structure: Additional Functions in ecoDMS . . . 130
7.7.12.1 Create New Folder . . . 130
7.7.12.2 Skip to Folder . . . 131
7.7.12.3 Expand / Collapse Folders . . . 131
7.7.12.3.1 Expand Folders . . . 131
7.7.12.3.2 Collapse Folder . . . 131
7.7.12.3.3 Expand All Folders . . . 132
7.7.12.3.4 Collapse All Folders . . . 132
7.7.12.4 Order of the Folder Structure . . . 132
7.7.12.5 Hide Column(s) . . . 132
7.7.12.6 Show Column(s) . . . 132
7.8 Proxy . . . 133
7.9 Status . . . 133
7.9.1 Create New Status . . . 134
7.9.2 Rename Status . . . 135
7.9.3 Delete Status . . . 135
7.9.4 Assign Icons . . . 135
7.10 Web / API . . . 136
7.10.1 Web Access (Web Client / Remote Access / ecoDMS ScanApp) . . . 137
7.10.1.1 Start Web Service . . . 138
7.10.1.2 Stop Web Service . . . 138
7.10.2 API Access . . . 139
7.10.2.1 Activation . . . 139
7.10.2.1.1 Start API Service . . . 139
7.10.2.1.2 Stop API Service . . . 140
7.10.2.2 Statistik . . . 140
7.10.2.3 Swagger Documentation . . . 140
7.10.2.3.1 Start Swagger UI . . . 140
7.10.2.3.2 Stop Swagger UI . . . 141
7.10.3 TLS (SSL) . . . 141
7.10.3.1 Use a Self-Signed Certificate Generated by the System . . . 142
7.10.3.2 Use My Keystore . . . 142

8 Archiving 143
8.1 Function: Archiving . . . 143
8.2 Drag and Drop . . . 145
8.3 Move File(s) to Archive . . . 147
8.4 Archive File(s) as Version . . . 147

9 e-Invoices 149
9.1 Supported Formats . . . 149

9.2 Importing . . . 150
9.3 Archiving and File Access . . . 150
9.3.1 XRechnung . . . 150
9.3.2 ZUGFeRD . . . 151
9.4 Document Status and Validation Results . . . 152
9.5 Validation Report . . . 152
9.6 Scan Input and Inbox . . . 154
9.6.1 Features in the Inbox . . . 154

10 Duplicate Detection 156

11 Side Panel 158
11.1 Enable / Disable Side Panel . . . 159
11.2 Enable Classification Templates . . . 159
11.3 Specify Target Profile . . . 160
11.4 Automatic Archiving (Dark Process) . . . 160
11.5 Automatic Pre-Classification (Classification dialog) . . . 161

12 Inbox for Incoming Email Processing 162
12.1 Supported File Formats . . . 163
12.1.1 Handling Faulty Files in Scaninput . . . 164
12.2 Scaninput . . . 164
12.2.1 Create Scaninput Folder . . . 164
12.2.1.1 Permissions (Scan Recipients) . . . 165
12.2.1.1.1 Ignore Users / Groups of Templates . . . 166
12.2.1.2 Scan Options . . . 166
12.2.1.2.1 Finalise Document . . . 166
12.2.1.2.2 Recognise Separator Pages . . . 166
12.2.1.2.3 Recognise Barcodes (Templates) . . . 166
12.2.1.2.4 Recognise Templates . . . 166
12.2.1.2.5 Duplicate Detection . . . 166
12.2.1.2.6 Use This Template . . . 167
12.2.1.2.7 Separate Documents with Barcodes . . . 167
12.2.2 Delete Scaninput Folder . . . 167
12.2.3 Scaninput: Scan Documents . . . 168
12.2.3.1 Target Path for Scaninput Folders . . . 168
12.2.3.2 Scan Process . . . 168
12.2.3.3 Manual Access . . . 169
12.3 Separator Pages for the Scan Process . . . 169
12.4 TWAIN/WIA/SANE: Scan Documents . . . 170
12.4.1 Select Scanner . . . 171
12.4.2 Configure Scanner . . . 171

12.4.3 Scan New Document . . . 172
12.4.4 Add Pages to Document . . . 172
12.5 Request Scans . . . 173
12.6 Display Overview of All Scans . . . 173
12.6.1 Delete Documents . . . 174
12.7 Classification . . . 174
12.7.1 Copy & Paste Content & Barcodes . . . 175
12.7.1.1 Date Formats . . . 175
12.7.2 Default Classification (For User Workstation) . . . 176
12.7.2.1 Create Default Classification . . . 177
12.7.2.2 Delete Default Classification . . . 177
12.8 Automatic Document Recognition: Search for Classification Templates . . . 177
12.9 Classification Detection . . . 178
12.9.0.1 Date Detection . . . 178
12.10 Duplicate Detection . . . 179
12.11 Archive Scanned Documents . . . 180
12.12 Display Statistics . . . 181
12.13 Next Document . . . 182
12.14 Previous Document . . . 183
12.15 Import Documents . . . 183
12.15.1 Import Documents (Drag & Drop) . . . 183
12.15.2 Import Documents (Menu) . . . 184
12.16 Select / Highlight Multiple Pages . . . 184
12.17 Split Document in Two . . . 185
12.18 Split Document into Separate Pages . . . 186
12.19 Invert Page Order . . . 187
12.20 Move One or Multiple Pages . . . 187
12.21 Unlock Documents . . . 187
12.22 Edit Documents . . . 188
12.22.1 Copy, Cut and Paste Pages . . . 188
12.22.1.1 Cut . . . 188
12.22.1.2 Paste . . . 189
12.22.1.3 Copy . . . 190
12.22.2 Rotate Pages . . . 190
12.22.2.1 Rotate Left . . . 190
12.22.2.2 Rotate Right . . . 191
12.22.2.3 Rotate 180 Degrees . . . 191
12.22.3 Export Pages . . . 192
12.22.4 Add Pages . . . 192
12.22.5 Delete Pages . . . 193
12.22.6 Move Pages . . . 193
12.22.7 Swap Pages . . . 194

12.22.8 Zoom Pages / View . . . 194
12.22.8.1 Zoom Out . . . 194
12.22.8.2 Zoom In . . . 195
12.22.8.3 Fit . . . 195
12.22.9 Select Pages . . . 195
12.22.9.1 Select All Pages . . . 196
12.22.9.2 Select Even Pages . . . 196
12.22.9.3 Select Odd Pages . . . 196
12.22.9.4 Undo Selection . . . 196
12.22.9.5 Reverse Selection . . . 197
12.22.9.6 Next Page . . . 197
12.22.9.7 Previous Page . . . 197
12.23 Close Documents . . . 197
12.23.1 Close All Documents . . . 198
12.24 Delete Documents . . . 198
12.24.1 Delete Document (Overview) . . . 198
12.24.2 Delete Document (User) . . . 198
12.24.3 Delete All Documents (Admin) . . . 199
12.25 Storage Functions . . . 199
12.25.1 Save Changes . . . 199
12.25.2 Save as PDF . . . 200
12.25.3 Save As . . . 200

13 Classification 202
13.1 Classification dialog . . . 202
13.1.1 Open Classification dialog . . . 203
13.1.2 Change order of Attributes . . . 203
13.1.3 Show/Hide Attributes . . . 204
13.1.4 Undo . . . 204
13.1.5 OK . . . 204
13.1.6 Save and Continue . . . 204
13.1.7 Skip Between Documents . . . 204
13.1.8 Cancel - Message . . . 204
13.2 Classify . . . 204
13.2.1 DocID . . . 204
13.2.2 Main Folder . . . 205
13.2.3 Folder . . . 205
13.2.3.1 Classification dialog . . . 205
13.2.3.1.1 Copy & Paste Text . . . 206
13.2.3.2 Table View (ecoDMS) . . . 206
13.2.3.3 Drag & Drop Classification in ecoDMS . . . 207

13.2.4 Comment . . . 207
13.2.4.1 Classification dialog . . . 207
13.2.4.1.1 Copy & Paste Text . . . 208
13.2.4.2 Table View (ecoDMS) . . . 208
13.2.5 Status . . . 208
13.2.5.1 Classification dialog . . . 209
13.2.5.2 Table View (ecoDMS) . . . 209
13.2.5.3 Drag & Drop Classification in ecoDMS . . . 210
13.2.6 Revision . . . 211
13.2.7 Document Type . . . 211
13.2.7.1 Classification dialog . . . 211
13.2.7.2 Table View (ecoDMS) . . . 211
13.2.8 Last Change . . . 212
13.2.9 Date . . . 212
13.2.9.1 Classification dialog . . . 212
13.2.9.1.1 Copy & Paste Text . . . 213
13.2.9.2 Table View (ecoDMS) . . . 213
13.3 Permissions . . . 214
13.3.1 Assign Permissions . . . 214
13.3.1.1 View and Classify . . . 214
13.3.1.2 View Only . . . 215
13.3.1.3 For Classification by All Users . . . 215
13.3.1.4 For View by All Users . . . 215
13.3.2 Remove Permissions . . . 215
13.3.2.1 View and Classify . . . 215
13.3.2.2 View Only . . . 215
13.3.2.3 For Classify by All Users . . . 216
13.3.2.4 For View by All Users . . . 216
13.4 Preview . . . 216
13.5 Classification Detection . . . 216
13.6 Mass Classification . . . 217
13.6.1 Massenklassifizierung öffnen . . . 217
13.6.2 Permissions in Mass Classification . . . 218
13.7 Multiple Classification . . . 218
13.7.1 Multiple Classification / Add Tab . . . 219
13.7.2 Multiple Classification / Remove Tab . . . 220
13.7.3 Show Multiple Classification . . . 220
13.8 Batch Classify Multiple Documents . . . 220
13.9 Undo Classification . . . 221

14 Classification Templates (Template Designer) 222
14.1 Frequently Asked Questions (FAQs) and Notes . . . 222
14.1.1 What does a Classification Template do? . . . 223
14.1.2 Where can I find the templates? . . . 223
14.1.3 What permissions do I need? . . . 223
14.1.4 What is the template document? . . . 223
14.1.5 Supported File Types and Plugins . . . 223
14.1.6 Caution with Multiple Classifications! . . . 224
14.2 Open Template Management . . . 224
14.3 Create Template . . . 224
14.3.1 Select Document . . . 224
14.3.2 Create a Template in the Designer . . . 225
14.3.3 Name (Name Template) . . . 225
14.3.4 Keywords . . . 225
14.3.4.1 Enter Keywords Manually . . . 225
14.3.4.2 Adopt Keywords from Preview . . . 225
14.3.4.3 Expert Feature: Regular Expressions (RegEx) . . . 226
14.3.4.4 Use Barcodes for Recognition . . . 226
14.3.5 Options . . . 226
14.3.5.1 Shortcut . . . 226
14.3.5.2 Header and Footer Recognition (Text Recognition) . . . 227
14.3.5.3 Automatically Archive When Recognized (Scaninput) . . . 227
14.3.5.4 Special Features for e-Invoices . . . 227
14.3.5.4.1 Only Apply for e-Invoices . . . 228
14.3.5.4.2 Apply to all e-Invoices (without Keyword check) . . . 228
14.3.6 Classification / Select Attributes . . . 229
14.3.6.1 Add Attributes . . . 229
14.3.6.2 Permissions . . . 229
14.3.6.3 Text Fields (e.g. Comment) . . . 229
14.3.6.4 Folder . . . 230
14.3.6.5 Date Fields . . . 231
14.3.7 Classification / Attribute Values (Chips) . . . 232
14.3.7.1 Free Text Field . . . 232
14.3.7.2 File Name . . . 232
14.3.7.3 e-Invoice (XML Data) . . . 232
14.3.7.4 OCR (Text Recognition) . . . 232
14.3.7.4.1 How to Mark a Position in the Document . . . 233
14.3.7.4.2 Additional OCR Settings . . . 233
14.3.7.4.2.1 Search Settings . . . 233

14.3.7.4.2.2 Date Format . . . 233
14.3.7.4.2.3 Allowed Characters (e.g. for Folders & Text Fields) . . . 234
14.3.7.4.2.4 Allowed Characters: RegEx (Regular Expressions – Expert Feature!) . . . 234
14.3.7.4.2.5 Use the Following Information (Folder Recognition) . . . 235
14.3.7.4.2.6 Selection is a Barcode . . . 236
14.3.7.5 Date . . . 236
14.3.7.5.1 Fixed Date . . . 236
14.3.7.5.2 Dynamic Date . . . 237
14.3.7.6 Folder . . . 238
14.3.8 Test Template . . . 238
14.4 Select Template (Manually) . . . 239
14.4.1 Selection in the Classification Dialog . . . 239
14.4.2 Apply Template in the Inbox . . . 239
14.5 Edit Template . . . 240
14.6 Replace Template Document (Master) . . . 240
14.7 Copy Template . . . 240
14.8 Delete Template . . . 241

15 Display, Download, Export, Preview) 242
15.1 Download / Export . . . 242
15.2 Download via Drag and Drop . . . 243
15.3 Exporting Originals via the Context Menu . . . 243
15.4 Reload Documents . . . 244
15.5 View Documents . . . 244
15.6 Preview Pane . . . 245
15.6.1 Show/Hide Preview Pane . . . 245
15.6.2 Scalability: Preview in Focus . . . 246
15.6.2.1 Scale Preview Pane . . . 246
15.6.2.2 Minimize Feature Area (Tabs) . . . 246
15.6.3 Load / No PDF Preview . . . 247
15.6.4 Preview Quality . . . 249
15.6.5 Highlight Recognized Text . . . 251
15.6.6 Zoom Preview . . . 252
15.6.7 Preview Full Screen . . . 252
15.7 Data Export Plugin . . . 252
15.7.1 Open Plugin . . . 253
15.7.2 Select and Download Data . . . 253
15.7.3 Remove Export from List . . . 255

15.7.4 Access Exported Documents . . . 255
15.7.5 Access XML Information . . . 256
15.8 Offline Client . . . 257
15.8.1 Start Offline Client . . . 257

16 Search, Filters, and Favorites 259
16.1 Full-Text Search . . . 259
16.1.1 Simple Full-Text Search . . . 259
16.1.2 Placeholders / Wildcard Search . . . 261
16.1.3 Fuzzy Search: Fuzzy Search . . . 261
16.1.4 Boolean Operators . . . 262
16.2 Advanced Search . . . 263
16.2.1 Enter Search Criteria and Start Search . . . 264
16.2.2 Remove Search Criteria . . . 265
16.3 Favorites . . . 265
16.3.1 Personal Favorites . . . 266
16.3.2 Shared Favorites . . . 266
16.3.3 Edit Favorites . . . 267
16.3.4 Delete Favorites . . . 267
16.4 PDF Highlight Tracking . . . 267
16.5 Dynamic Date Search . . . 268
16.6 Shortcut Search . . . 270
16.6.1 Change Shortcut . . . 270
16.6.2 Reset Shortcut . . . 270
16.6.3 Execute Search Shortcut . . . 271
16.7 Filter by Status . . . 271
16.8 Filter by Folder . . . 271
16.8.1 Browse Folder Tree . . . 272
16.9 Stop Search Query . . . 273

17 Version Management 275
17.1 Create Initial Version . . . 276
17.2 Add New Version . . . 276
17.3 Comment . . . 276
17.4 Open Version . . . 277
17.5 Export Version . . . 277
17.6 Send Email . . . 278
17.7 Finalise Document (Version) . . . 279
17.8 Check-Out Document . . . 279
17.9 Check-In Document . . . 280

18 PDF Editor, Annotations, Highlight Colors, Highlight Report 281
18.1 Open PDF Editor . . . 282

18.2 Save PDF . . . 284
18.3 Continuation Mode (Scroll Pages) . . . 284
18.4 Annotations . . . 284
18.4.1 Create New Annotation . . . 285
18.4.2 Appearance . . . 285
18.4.2.1 Font . . . 285
18.4.2.2 Background Color . . . 286
18.4.2.3 Background Image . . . 286
18.4.2.4 Opacity . . . 286
18.4.3 Placeholder . . . 287
18.4.4 Templates . . . 288
18.4.4.1 Save Annotation As Template . . . 289
18.4.4.2 Delete Template . . . 290
18.4.5 Delete Annotation . . . 290
18.4.6 Show/Hide Annotations . . . 291
18.5 15.5 Highlight Colors + Highlight Report . . . 291
18.5.1 Highlight Areas . . . 292
18.5.1.1 Highlight Text . . . 292
18.5.1.2 Free Highlight . . . 293
18.5.1.3 Add Notes / Comments . . . 294
18.5.2 Generate Highlight Report . . . 295
18.5.3 Include Highlight Colors in Download . . . 297
18.5.4 Include Highlight Colors in Filters . . . 298

19 Blackening PDF 300
19.1 Blacken . . . 302
19.2 Unblacken . . . 302
19.3 Open Blackened Version . . . 303
19.4 Export Blackened Version . . . 303

20 Clipboard: Collect Documents 304
20.1 Add Documents . . . 305
20.2 Create Clipboard . . . 306
20.3 Empty Clipboard . . . 306
20.4 Remove Clipboard . . . 306
20.5 Export Documents . . . 307
20.6 Send Documents . . . 307
20.7 Clipboard Permissions . . . 308
20.8 Open Document . . . 309
20.9 Delete Document . . . 309
20.10 Show Classification . . . 310
20.11 Search for Clipboard . . . 310
20.12 Search Documents in Clipboard . . . 310

21 Notes 311
21.1 Write New Note . . . 311
21.2 Edit Note . . . 312
21.3 Delete Note . . . 312

22 Linking / Attachments 314
22.1 Linking . . . 315
22.1.1 Create Link . . . 315
22.1.2 Remove Link . . . 315
22.1.3 Open Link . . . 315
22.1.4 Export Link . . . 316
22.1.5 Send Link . . . 316
22.2 Email Attachments . . . 317

23 Sharing Documents over the Internet 318
23.1 Enable Remote Access . . . 318
23.2 Share Documents . . . 319
23.3 Start Download . . . 321
23.4 Shared Documents Overview . . . 322
23.5 Delete Downloads . . . 323
23.6 Retrieve Download Link . . . 323

24 Direct Links to Documents and Folders 324
24.1 Copying a Link to a Document . . . 324
24.2 Send Document Link via Email . . . 325
24.3 Copying a Link to a Folder . . . 325
24.4 Send Folder Link via Email . . . 326

25 Activities and History 327
25.1 Display Activities . . . 328
25.2 View History . . . 328

26 Trash and Erasure Features 329
26.1 Trash . . . 329
26.1.1 Starting and Exiting the Trash View . . . 329
26.1.2 Moving Documents to the Trash . . . 329
26.1.3 Restoring Documents . . . 330
26.2 Erase Documents . . . 330
26.2.1 Review and Release . . . 331
26.2.1.1 Check and Modify Retention Periods . . . 332
26.2.1.2 Release Documents for Erasure . . . 332
26.2.2 Permanently Erase Documents . . . 333
26.2.3 View Erasure Log . . . 335

27 Send Document via Email 337

28 Resubmission / Reminder 339
28.1 Set Resubmission Date . . . 340
28.2 Display Resubmissions on Launch . . . 341

29 Print Documents (Paper) 342

30 Snapshot 343
30.1 Configure Snapshot Shortcut . . . 343
30.2 Create Snapshot . . . 344

31 Backup 347
31.1 Important Notes . . . 347
31.2 Automatic Backup . . . 348
31.3 Backup under Windows . . . 350
31.3.1 oneClick Backup (Software) . . . 350
31.3.2 Console Programme for Data Backup . . . 352
31.4 Backup under Linux . . . 353
31.4.1 oneClick Backup (Software) . . . 353
31.4.2 Console Programme for Data Backup . . . 355
31.5 Backup under Synology (NAS) . . . 356
31.6 Backup under QNAP (NAS) . . . 357

32 Restore 359
32.1 Restore under Windows . . . 359
32.1.1 oneClick (Software) . . . 359
32.2 Restore under Linux . . . 360
32.2.1 oneClick (Software) . . . 361
32.2.2 Restore via Console . . . 362
32.3 Restore under Synology (NAS) . . . 362
32.4 Restore under QNAP (NAS) . . . 363

33 PDF/A Printer 365
33.1 Settings (Windows) . . . 365
33.1.1 Select Print File . . . 366
33.1.2 Letter Template . . . 366
33.1.3 Search for Classification . . . 366
33.1.4 Archive File . . . 366
33.1.5 Print File . . . 367
33.1.6 Send File via Email . . . 367
33.1.7 Open File . . . 367
33.1.8 Close Print dialog after Processing . . . 367
33.1.9 Execute Programme . . . 367

33.2 Archive PDF/A . . . 367
33.3 Automatic Archiving . . . 368
33.3.1 Copy Classification to Clipboard . . . 369
33.3.2 Recognise Attributes via Dummy Text . . . 370
33.3.3 Archive Using Dark Process . . . 371
33.4 Call Email Client with Dummy Text . . . 372

34 Libre- + OpenOffice Add-on 373
34.1 Archive Document . . . 373
34.2 Edit Document . . . 376
34.3 Re-Archive Document . . . 378

35 Microsoft Office Add-in 379
35.1 Archive Document . . . 379
35.2 Edit Document . . . 381
35.3 Re-Archive Document . . . 383
35.4 Archive Emails from Outlook . . . 383
35.4.1 Send and Archive . . . 384
35.4.2 Archive Single Email . . . 386
35.4.3 Archive Several Emails Consecutively . . . 387
35.4.4 Archive Several Emails Simultaneously (Mass Classification) . . . 388
35.4.5 Archive Attachments . . . 389

36 Thunderbird Add-on 391
36.1 Send and Archive . . . 392
36.2 Archive Single Email . . . 393
36.3 Archive Several Emails Consecutively . . . 394
36.4 Archive Attachments . . . 395

37 ecoMAILZ Plugin 397
37.1 Search & Filters . . . 397
37.2 Copy to ecoDMS . . . 399
37.3 Download . . . 401
37.4 Download (PDF) . . . 402

38 ecoDMS Server 405
38.1 postgreSQL Database . . . 405
38.2 Container Storage System . . . 405
38.3 Stop ecoDMS Server . . . 405
38.3.1 Windows: Explanation . . . 405
38.3.2 Ubuntu / DebiTo: Explanation . . . 406
38.4 Start ecoDMS Server . . . 406
38.4.1 Windows: Explanation . . . 406
38.4.2 Ubuntu / DebiTo: Explanation . . . 407

39 WORKZ Add-on 408
39.1 Installation and License Activation . . . 408
39.2 WORKZ Settings Dialog . . . 409
39.3 Activate and Assign Permissions for Process Control . . . 410
39.3.1 Funktionen aktivieren . . . 410
39.3.2 Assign Permissions for Features . . . 410
39.4 Managing Acknowledgements and Approvals . . . 411
39.5 Configure Notifications for Users . . . 412
39.6 File Import . . . 413
39.6.1 Set up Import . . . 413
39.6.2 Configure File Import . . . 413
39.6.2.1 Execution Mode . . . 415
39.6.2.1.1 One-time . . . 415
39.6.2.1.2 Recurring . . . 415
39.6.2.2 Archiving Mode . . . 416
39.6.2.2.1 Classify . . . 416
39.6.2.2.2 Copy To The Following Scaninput . . . 416
39.6.2.2.3 Finalize Documents . . . 416
39.6.2.3 Import Folder . . . 416
39.6.2.4 Include Subfolders . . . 417
39.6.2.5 Transfer Filename to . . . 417
39.6.2.6 Action After Archiving . . . 417
39.6.3 Configured File Imports . . . 417
39.6.3.1 Available Actions / Features . . . 417
39.6.3.1.1 Stop Import . . . 417
39.6.3.1.2 Start Import (One-time) . . . 418
39.6.3.1.3 Start Import (Recurring) . . . 418
39.6.3.1.4 Edit . . . 418
39.6.3.1.5 Delete . . . 418
39.7 Email Import . . . 419
39.7.1 Set Up Microsoft 365 Mail Import . . . 419
39.7.2 IMAP Mail-Import einrichten . . . 421
39.7.3 Configure Email Import . . . 423
39.7.3.1 Execution Mode . . . 423
39.7.3.1.1 One-time . . . 423
39.7.3.1.2 Recurring . . . 423

39.7.3.2 Archiving Mode . . . 424
39.7.3.2.1 Classify . . . 424
39.7.3.2.1.1 Classification for Emails . . . 424
39.7.3.2.1.2 Classification for Attachments . . . 424
39.7.3.2.1.3 Link Email Attributes to Classification . . . 424
39.7.3.2.2 Copy to the Following Scaninput . . . 425
39.7.3.2.3 Finalize Documents . . . 425
39.7.3.2.4 Use email classification for attachments . . . 425
39.7.3.2.5 Link Attachments with Email Document . . . 425
39.7.3.3 Email Filter . . . 426
39.7.3.4 Attachment Filter . . . 426
39.7.3.5 Archive... . . . 426
39.7.3.6 Action after Archiving . . . 427
39.7.4 Configured Email Imports . . . 427
39.7.4.1 Available Actions / Features . . . 427
39.7.4.1.1 Stop Import . . . 427
39.7.4.1.2 Start Import (one-time) . . . 427
39.7.4.1.3 Start Import (recurring) . . . 428
39.7.4.1.4 Edit . . . 428
39.7.4.1.5 Delete . . . 428
39.8 Acknowledgement . . . 428
39.8.1 Configure Acknowledgements . . . 429
39.8.2 Acknowledge . . . 431
39.8.3 Acknowledge Manually . . . 432
39.9 Approval . . . 434
39.9.1 Configure Approval . . . 434
39.9.2 Approve . . . 437
39.9.3 Reject Approval . . . 439
39.9.4 Create Manual Approval . . . 441
39.10 Digital Stamp . . . 443

40 ecoDMS ScanApp 444
40.1 Requirements for Using the ScanApp . . . 444
40.2 Connect ScanApp to ecoDMS . . . 445
40.2.1 Step 1: Prepare Barcode on PC . . . 445
40.2.2 Step 2: Establish Connection via Smartphone | Create Profile . . . 446
40.2.3 Step 3: Complete Login . . . 447

41 Login Credentials **449**
41.1 Default User 449
41.2 System Administrator 449
41.3 PostgreSQL Database 450
41.4 Scaninput Folder (Linux Distributions) 450

1 Getting started with ecoDMS (burns)

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



Figure 1.1: ecoDMS: Document Management System

1.1 Installation as standalone or network solution

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

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

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

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

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

a) Customers who wish to install the default settings at a later date can download the necessary backup file at `www.ecodms.de/en/download/database-pre-configurations`

1.2 First login and server connection

1. To log in to ecoDMS for the first time, open the Connection Manager to start the connection via the desktop client.
2. Enter your user name, password, and server address to connect to the server and start managing your documents.
   a) As an administrator, use the following login credentials with all necessary permissions when you first login:
      - Username: ecodms
      - Password: ecodms
      - Server IP address:
        - For a local standalone solution, you can use "localhost" as your server address.
        - For a network application, you must enter the respective IP address for the ecoDMS server
   b) For security reasons, change the password for the default user as soon as you have logged in for the first time.
   c) For more information and default users, refer to the chapter "Access Data" in the ecoDMS manual.

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

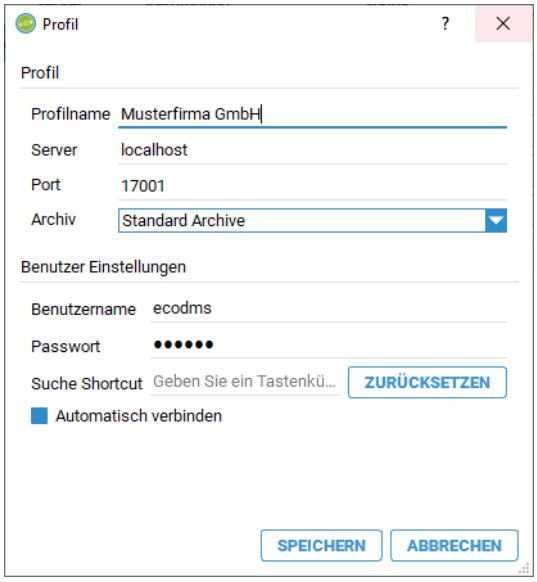


Figure 1.2: Connection Manager - Example Settings for Local Installation (Single Seat)

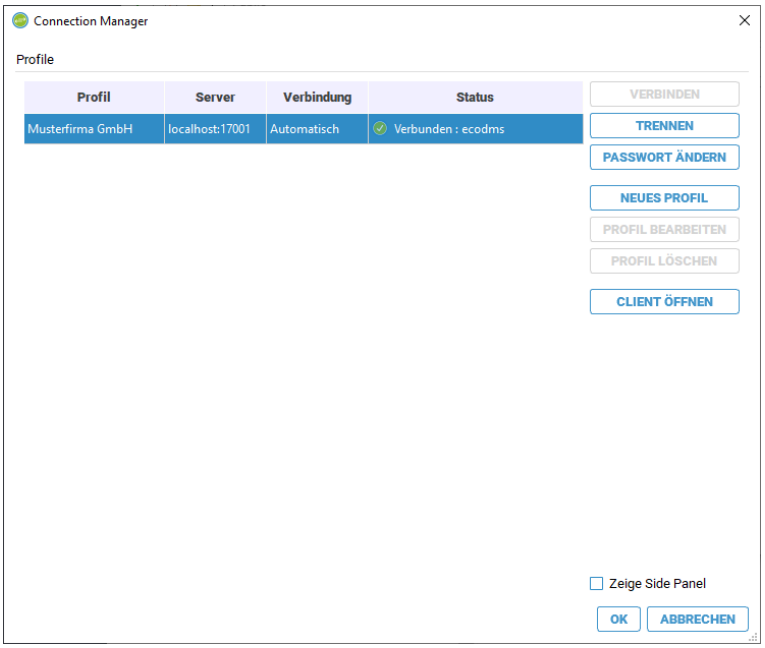


Figure 1.3: Connection Manager - Example Profile for Local Installation

1.3 User management and initial setup of structures

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

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

1. Options - Users:
    a) Create users: In the ecoDMS client, create users to control access to your documents. Specify who can access which documents.
    b) Assign roles: Create roles in ecoDMS Client to group permissions for user groups. This allows you to manage permissions more efficiently.
    c) Specify permissions: In ecoDMS client, assign groups and roles (permissions) to users to specify who can execute which actions with documents.
2. Options - Settings:
    a) Create folders and document types: In ecoDMS Client, create folders and document types to better organize your documents. Make sure you differentiate between folders and document types.
        i. Examples for document types: Invoice, delivery note, agreement, policy, tax declaration, reminders, etc.
        ii. Examples for folders: Suppliers, customers, insurances, employees, etc.

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

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

1.4 Archiving documents in ecoDMS

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

There are several ways of archiving documents in ecoDMS:

- For example, you can use a scanner to scan and archive paper documents via the Inbox feature in ecoDMS.
- You can also drag and drop documents from the file explorer to ecoDMS for long-term storage.
- There are add-ons and plugins to archive documents and emails straight to ecoDMS from applications such as Microsoft Office and LibreOffice.
- The version control feature lets you save and edit different document versions.

For more information on archiving methods, refer to this ecoDMS manual.

1.4.1 Scan Process

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

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

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

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

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

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

1.4.2 Archive & Classify Digital Files

- You can save virtually any file format in ecoDMS. You can drag and drop documents, which are already saved on your computer, into the archive.
- ecoDMS carries out full-text recognition automatically in the background for readable files.
- Depending on the document, you can classify either manually or automatically with the template designer. As an option, you can also work with mass classification. This allows you to classify any number of documents simultaneously with the same information.
- With the right classification attributes, you can assign the document type, the customer folder, the date, the responsibilities and much more information to the document, all of which can be edited at any time. Apart from the full-text search, you can use these attributes to create exact filters to search for documents and to access the required data and information quickly.

2 License Activation + Software Status

- An internet connection is required to activate a license via the ecoDMS settings.
  - If the computer (ecoDMS server) does not have internet access, the license can be activated using a form on the ecoDMS website: `https://www.ecodms.de/en/support/license-activation`
- To transfer your ecoDMS software license to another computer or reuse it after uninstalling the server software, you must first deactivate the license:
  - **Self-deactivation:** Use the integrated administrator function in the ecoDMS software's settings dialog to deactivate the license. A detailed guide is written in this chapter of the manual.
  - **Support request:** If you are unable to deactivate the license yourself, our support team is happy to assist. Please use the provided form at `https://www.ecodms.de/en/support/licence-restoration`

The purchased ecoDMS license is activated and managed by the administrator through the ecoDMS settings dialog. On the License in the Settings, you can display and manage your license information.

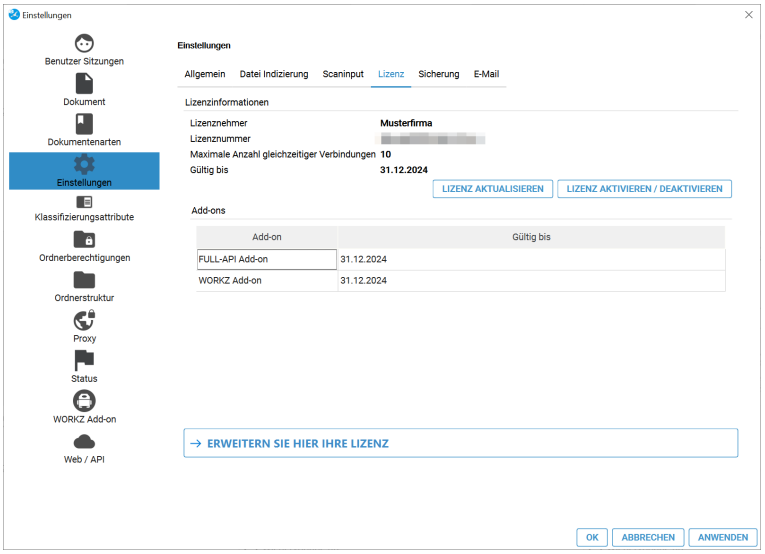


Figure 2.1: Settings - Settings - License (here: Full Version with Full API and WORKZ Add-on)

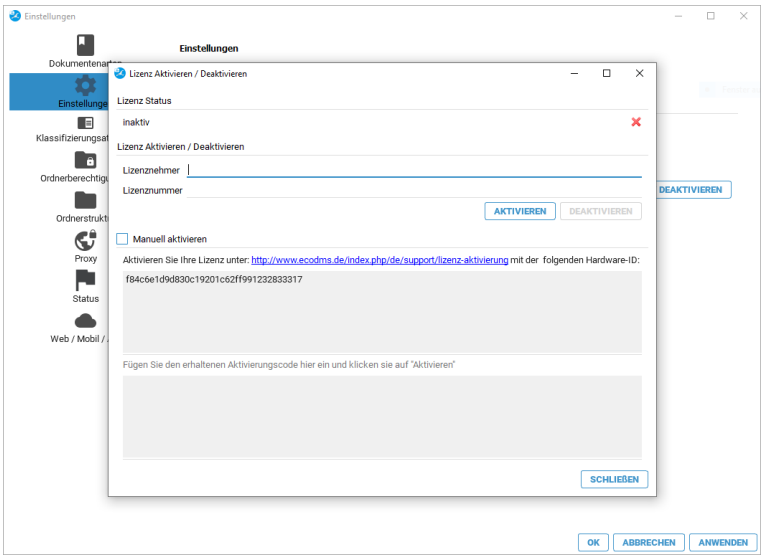


Figure 2.2: Settings- Settings - License Activation

2.1 Activate License via Settings dialog

The activation of a license is only permitted for one server instance. To transfer your ecoDMS software license to another computer or reuse it after uninstalling the server software, you must first deactivate the license.

This is how you can activate the license directly through the settings dialog in ecoDMS:

1. Select the tab "Settings - License" in the settings dialog.
2. Click "Activate License".
3. Enter your license information in the "Activate / Deactivate License" window.
   a) **Licensee:** Enter the licensee here. Make sure the spelling is correct. You received the name of the licensee via email after you purchased your license(s).
   b) **License Number:** Enter the license number here. Make sure the spelling is correct. You received the license number via email after you purchased your license(s).
4. Click "Activate".
   a) The license will be activated now.
5. Exit all ecoDMS programmes and reconnect all connected profiles via the Connection Manager (Disconnect / Connect).

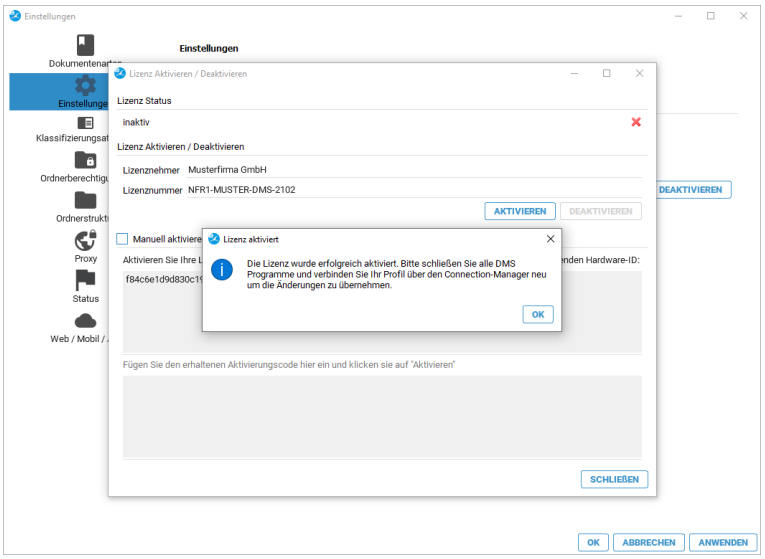


Figure 2.3: Settings - Settings - License Activation Successful

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

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

1. Open the Settings dialog and select the "Settings - License" tab.
2. Click "Update License"
    a) The license will be updated now.
3. To activate the new license information, users must close the ecoDMS client, disconnect and then re-establish the connectio via the Connection Manager.

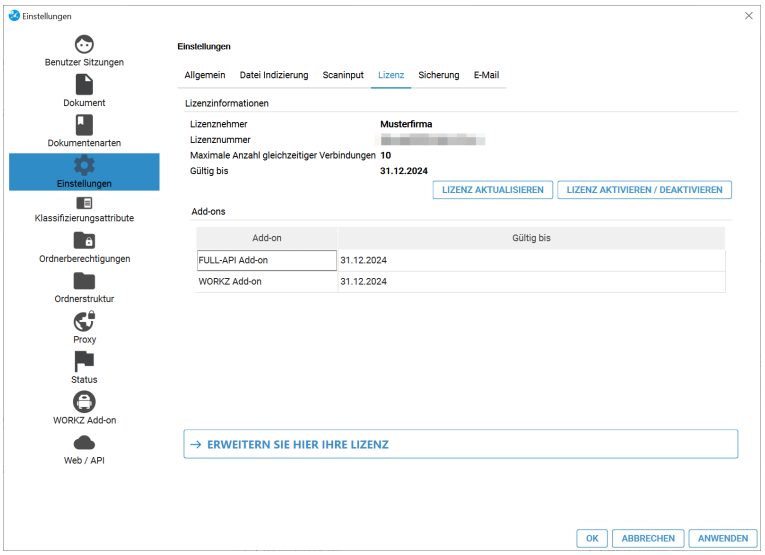


Figure 2.4: Settings - Settings - License (Here: Full Version with Full API and WORKZ Add-on)

2.3 Activate Licenses (ecoDMS without Internet Access)

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

1. Select the tab "Settings - License" in the settings dialog.
2. Click "Activate License".
3. Enter your license information in the "Activate / Deactivate License" window.
   a) **Licensee:** Enter the licensee here. Make sure the spelling is correct. You received the name of the licensee via email after you purchased your license(s).
   b) **License Number:** Enter the license number here. Make sure the spelling is correct. You received the license number via email after you purchased your license(s).
4. Enable the field "Activate manually".

5. Note the displayed Hardware ID.
    a) for example: Copy it to Clipboard.
6. Enter the written address into your web-browser: `https://www.ecodms.de/en/support/license-activation`
7. Now you must enter your license information and the hardware id.
    a) **Licensee:** Enter the licensee here. Make sure the spelling is correct. You received the name of the licensee via email after you purchased your license(s).
    b) **License Number:** Enter the license number here. Make sure the spelling is correct. You received the license number via email after you purchased your license(s).
    c) **Hardware-ID:** Enter your hardware id here. Please refer to the ecoDMS settings dialog to get the necessary Hardware ID (Clipboard).
8. Click "Activate License".
9. If the activation is successful, you will get your personal activation code.
    a) Note the displayed code.
        i. for example: Copy it to Clipboard.
10. Enter the Activation Code in the ecoDMS settings dialog.
11. Click "Activate".
    a) The license will be activated now.
12. To activate the new license information, users must close the ecoDMS client, disconnect and then re-establish the connection via the Connection Manager.

2.4 Deactivate License

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

1. Open the Settings dialog and select the "Settings - License" tab.
2. Click "Deactivate".
    a) The license is deactivated now.

2.5 License Details and Validity

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

To view your license details, complete the following steps:

1. Open the Settings dialog and select the "Settings - License" tab.
2. The following license information displays:
   - Licensee
   - License number
   - Maximum concurrent connections
   - "Valid until" specifies the end of the update period.
   - The add-on area displays the expiry date of any enhancements you purchased.
     - Following the expiry date, the add-ons are automatically deactivated.

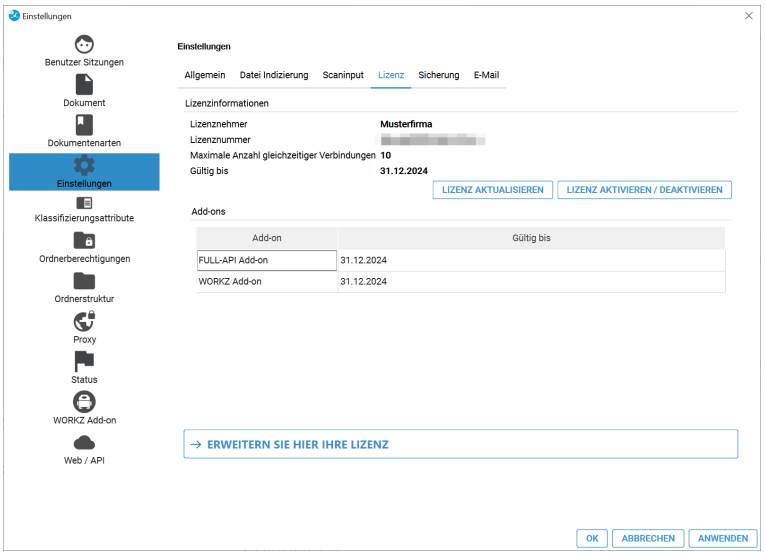


Figure 2.5: Settings - Settings - License (Here: Full Version with Full API and WORKZ Add-on)

2.6 Status of Software and License

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

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

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

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

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

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

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

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

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

3 Icon Overview

This section provides a compact and easy-to-understand overview of the icons used in ecoDMS. The symbols help you quickly navigate the user interface and make operating the system easier.

3.1 Connection Manager

	No Connection
	Connecting
	Connection Established

3.2 Inbox

	Save
	Save As
	Save as PDF
	Scan New Document
	Add Pages to Document
	Copy Text from Document
	Reload Workspace
	Zoom Out (Page)
	Zoom In (Page)
	Fit to Page

	Rotate Left (Page)
	Rotate Right (Page)
	Rotate 180 Degrees (Page)
	Delete Selected Page(s)
	Add Page(s)
	Export Selected Page(s)
	Reverse Page Order
	Overview
	Request Document (F5)
	Delete Document from Server (F8)
	Share Document (F7)
	Split Document into Individual Pages
	Unlock Document
	Search for Matching Classification Template

3.3 File

	Archive
	Link Document
	Set Reminder
	Activities
	Deadlines
	Reload Documents
	Move to Trash

	Exit

3.4 Activities

	Activities
	View
	Download
	Export Originals
	Send Document via Email
	Copy Internal Link to Clipboard
	Send Internal Link via Email
	Share Document via Internet
	Shared Documents

3.5 View

	Search Folder
	Continue Folder Search
	Jump to Folder
	Reload Workspace
	Reset Workspace
	Save Workspace Settings
	Load Workspace Settings

3.6 Options

	Settings
	Users
	Configure Toolbar
	Reset Search

3.7 Classification

	Classification
	Mass Classification
	Edit Templates

3.8 Data Export

	All Data Exports
	Create New Export
	Update Export Status
	Perform Export Download
	Remove Export from List

3.9 Versions

	Open Version
	Open PDF Version
	Export

	Export Version
	Export PDF Version
	Send Document via Email
	Lock Document
	Unlock Document
	Add New Version
	Finalize Version

3.10 Preview Window

	Toggle Full Screen
	Edit PDF
	Redact PDF
	Navigation: First Page
	Navigation: Previous Page
	Navigation: Next Page
	Navigation: Last Page

3.11 Trash

	Trash View Off (Normal View Active)
	Trash View On (Only documents in the trash are visible)

3.12 E-Invoices

	View Validation Report
	Status - Green: The file meets the requirements and can be accepted.
	Status - Yellow: Warnings were detected; a review is recommended.
	Status - Red: Errors were found; the file should not be accepted.

3.13 Resubmissions

Icon and Color	Days untill Resubmission
none	>7
	<=7
	<=3
	<1 (in addition, the document appears under the status "ToDo")

3.14 Layout: Table + Cards

	Switch to Card View - Currently in Table View
	Switch to Table View - Currently in Card View

3.15 WORKZ Add-on

The WORKZ Add-on is a paid, optional Addon for ecoDMS.

3.15.1 Email Import

Icon	Feature
	Server Settings
	Classification for Emails

	Classification for Attachments
	Link Email Attributes with Classification
	Define Interval for Recurring Import
	Type: One-time
	Type: Recurring
	Actions: Stop Import
	Actions: One-time Execution
	Actions: Recurring Execution

3.15.2 File Import

Icon	Feature
	Klassifizierung für Dateien
	Define Interval for Recurring Import
	Type: One-time
	Type: Recurring
	Actions: Stop Import
	Actions: One-time Execution
	Actions: Recurring Execution

4 Layout + Document Overview

- Recommended screen resolution: at least 1280 x 1024 pixels.xel.
- These settings apply only to the current workstation and are not saved in the user profile.
- The preview feature requires the full version of ecoDMS and can be tested in the demo version. It is not available in the Free4Three version.

The layout of the ecoDMS user interface and the sorting of documents can be customized individually for each user at every workstation.**

4.1 Document View (Layout)

ecoDMS offers two different views for displaying your documents:

- Card View (modern)
- Table View (classic)

You can switch between these views at any time - just click the corresponding icon at the bottom right of the document overview.

4.1.1 Card View: The Modern Display in Cards

How to switch to Card View::
Click on the "Card View" icon at the bottom right of the document overview.

	Switch to Card View - Currently, Table View is active.
	Switch to Table View - Currently, Card View is active.

The Card View displays your documents clearly in individual cards. Each card provides a quick overview of:

- Document preview (PDF)

- Key classification information
- Overview of previous activities
- Directly accessible features for the document
- Notes (view, edit, create)
- Version Management

4.1.1.1 Zoom Levels

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

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



Figure 4.1: Slider to Adjust Zoom Levels in the Cards View

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

4.1.1.1.1 First Zoom Level

1. The individual document tiles contain
    a) the DocID
    b) classification information (without icons)
    c) and a Share icon to open more features
2. Click the Share icon in a tile to open more features for the selected document. For more information about individual features, refer to the corresponding chapter in this manual.
    a) Display: Open Document
    b) Download: Download Document
    c) Email: Send Document by Email
    d) Share Link: Share Documents via Internet
    e) Internal Link: Copy Internal Link to Clipboard

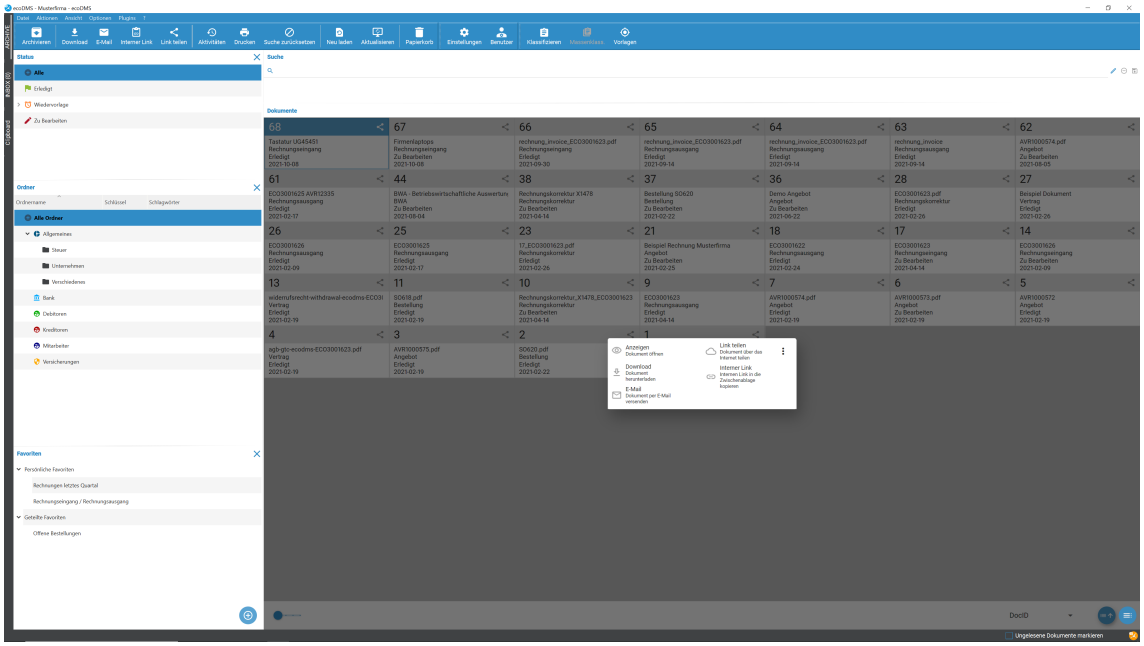


Figure 4.2: ecoDMS: First zoom level in the modern Card View

4.1.1.1.2 Second Zoom Level

1. The individual document tiles contain
    a) the DocID
    b) classification information (with icons)
    c) a small document preview
    d) and tabs with more features
2. Click one of the tabs to open more features for the selected document. For more information about individual features, refer to the corresponding chapter in this manual.
    a) Display: Open Document
    b) Download: Download Document
    c) Email: Send Document by Email
    d) Share Link: Share Documents via Internet
    e) Internal Link: Copy Internal Link to Clipboard

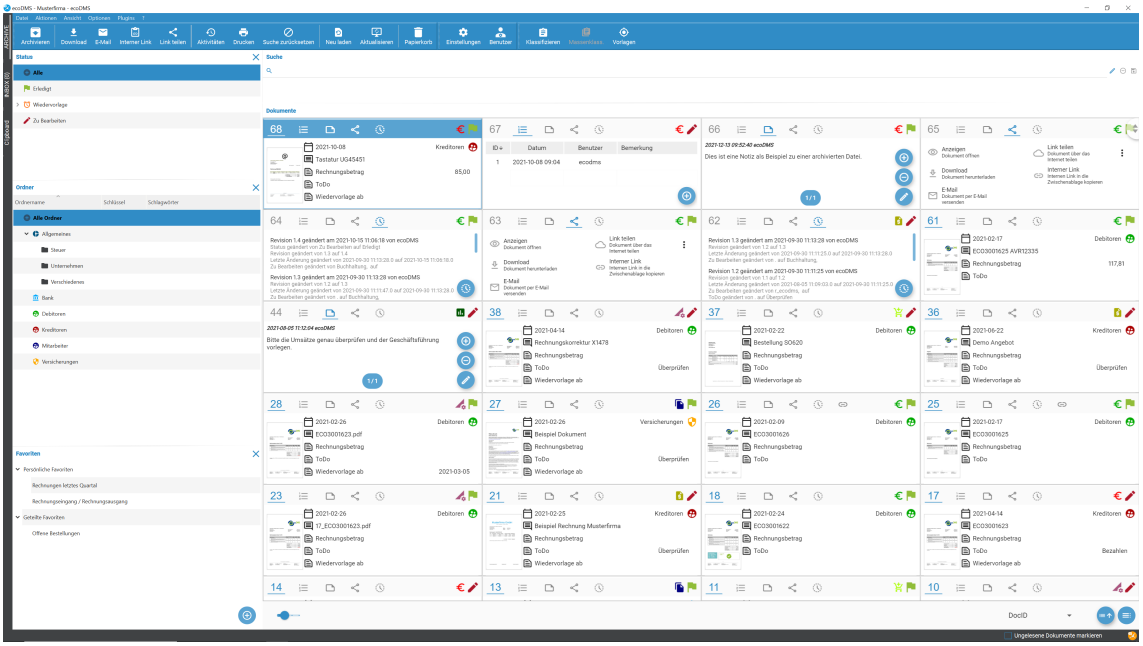


Figure 4.3: ecoDMS: Second zoom level in the modern Card View

4.1.1.1.3 Third Zoom Level

1. The individual document tiles contain
    a) the DocID
    b) classification information (with icons)
    c) a medium-sized document preview with full-screen feature
    d) icon for file format
    e) icon for information about existing notes
    f) and tabs for further features
2. Click one of the tabs to open more features for the selected document. For more information about individual features, refer to the corresponding chapter in this manual.
    a) Display: Open Document
    b) Download: Download Document
    c) Email: Send Document by Email
    d) Share Link: Share Documents via Internet
    e) Internal Link: Copy Internal Link to Clipboard

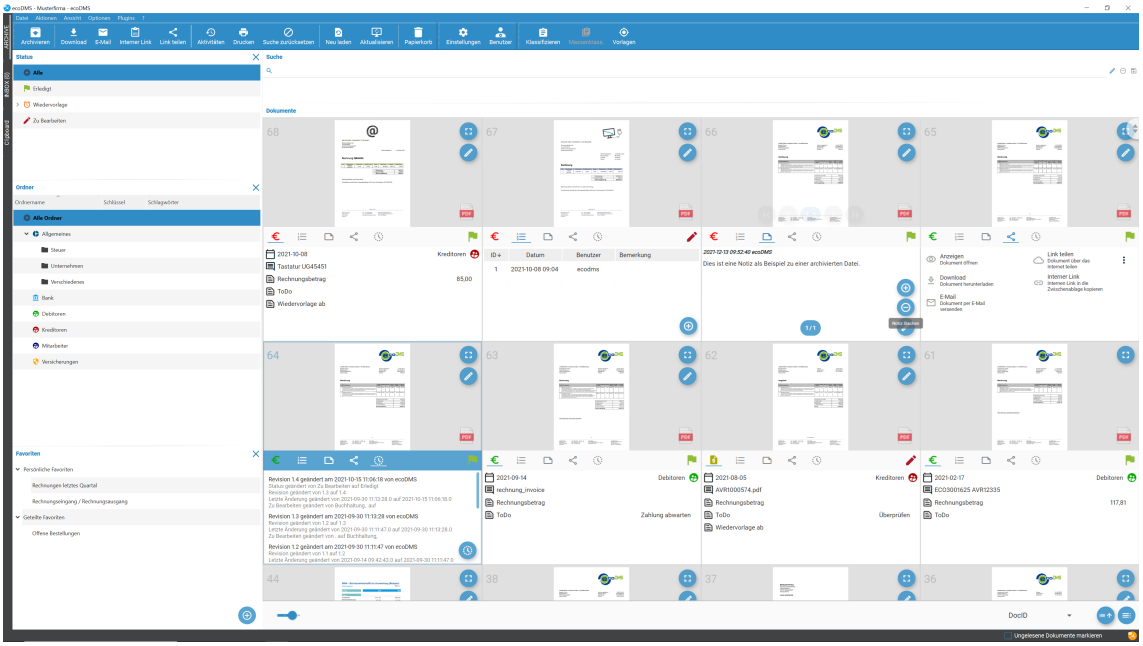


Figure 4.4: ecoDMS: Third zoom level in the modern Card View

4.1.1.1.4 Fourth Zoom Level

1. The individual document tiles contain
   a) the DocID
   b) classification information (with icons)
   c) a large document preview with full-screen feature
   d) icon for file format
   e) icon for information about existing notes
   f) and tabs for further features
2. Click one of the tabs to open more features for the selected document. For more information about individual features, refer to the corresponding chapter in this manual.
   a) Display: Open Document
   b) Download: Download Document
   c) Email: Send Document by Email
   d) Share Link: Share Documents via Internet
   e) Internal Link: Copy Internal Link to Clipboard

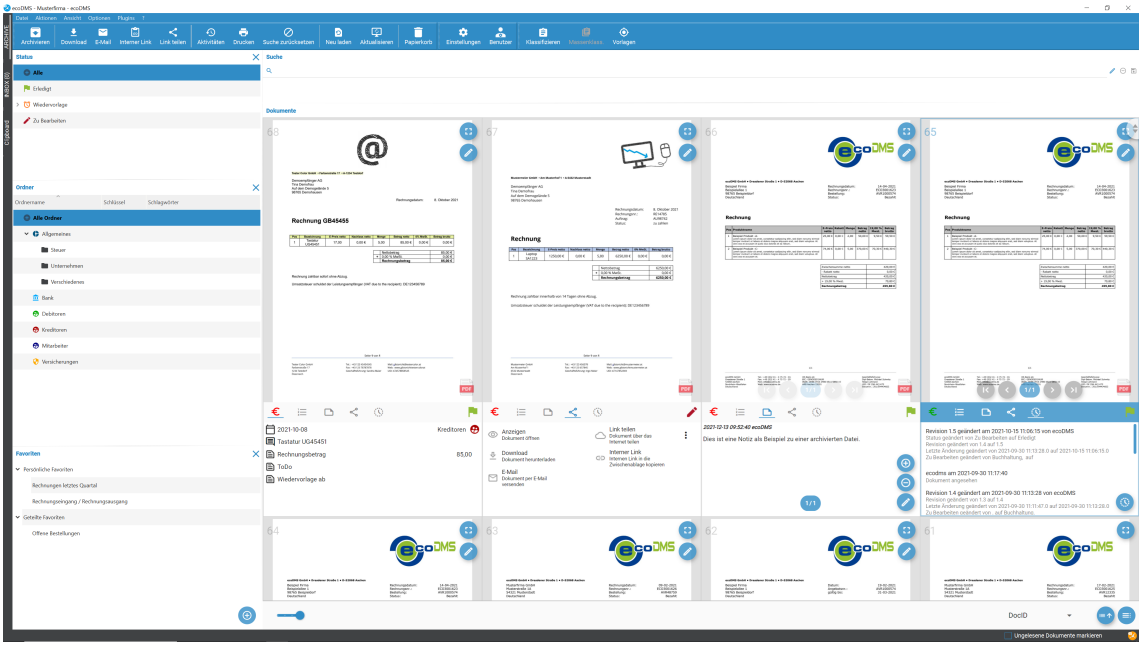


Figure 4.5: ecoDMS: Fourth Zoom Level in Modern Card View

4.1.1.2 Sort Card View

- The Sort button is below the card view.
- The available sorting options are ascending and descending order.
- You can sort by all available classification attributes of ecoDMS.

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

1. Below the card view, use the picklist to select the attribute by which you want to sort the documents
2. Use the Sort button to sort in descending or ascending order

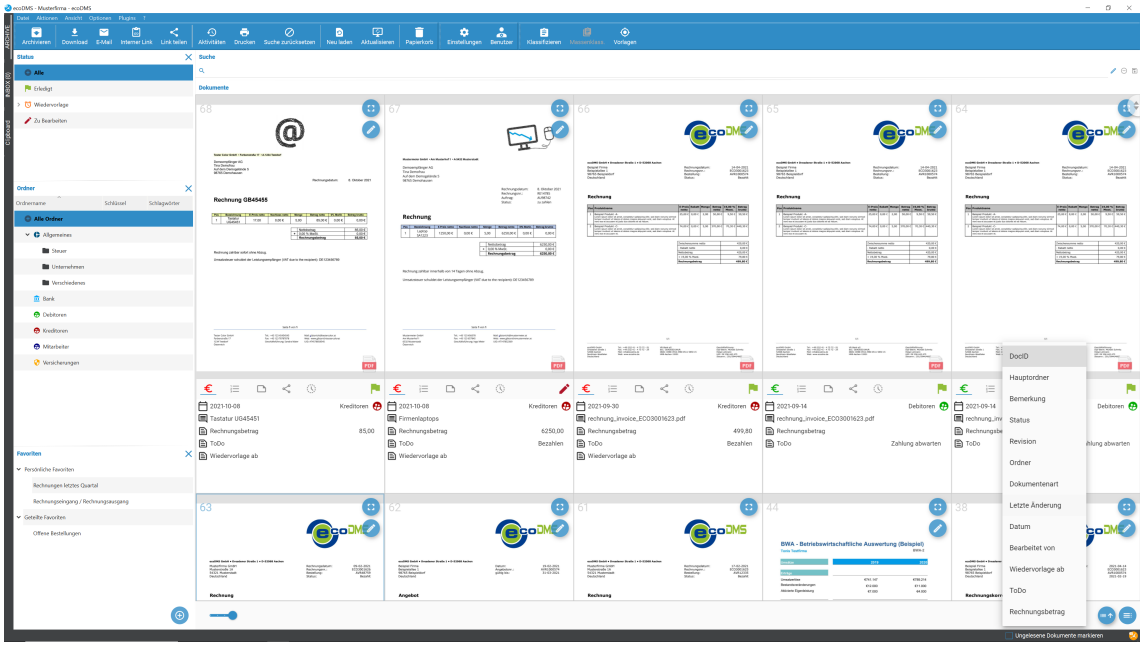


Figure 4.6: Sort Documents in Card View (Select Classification Attributes)

4.1.1.3 Table View: The Classic Display

How to switch to Table View:

Click on the "Table View" icon at the bottom right of the document overview.

	Switch to Card View - Currently, Table View is active.
	Switch to Table View - Currently, Card View is active.

In Table View, all documents are displayed in a list format - each document appears in its own row with the corresponding classification data. When you select a document, a detail window opens with the following information:

- Document preview (PDF)
- Activity history
- Features for the document
- Notes (view, edit, create)
- Version Management

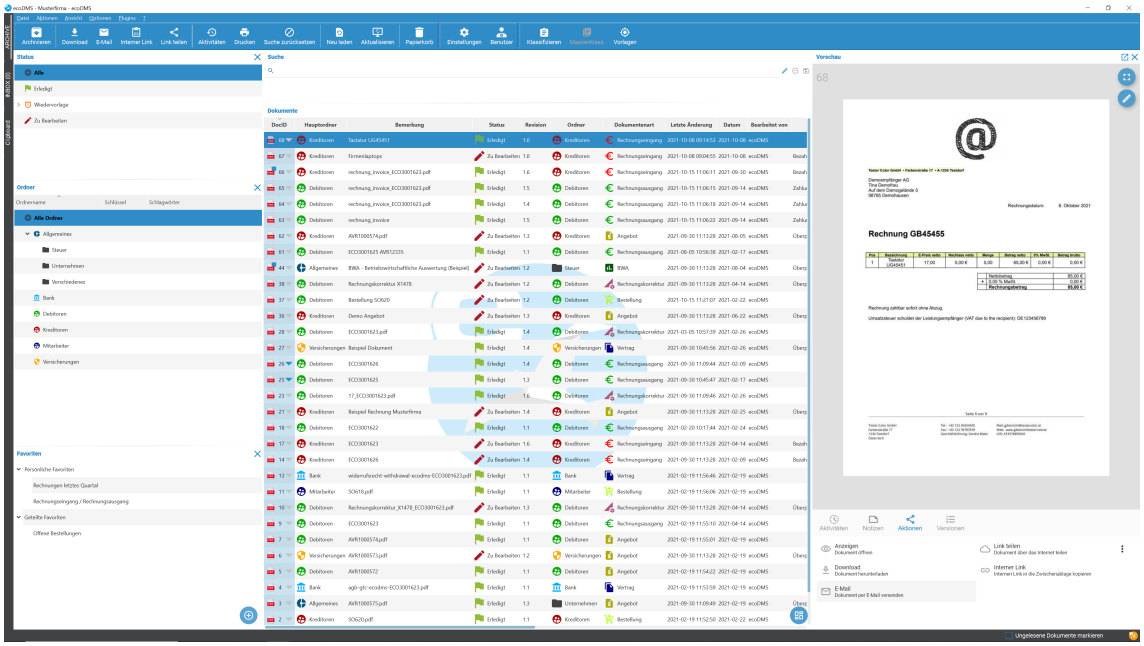


Figure 4.7: Tabellenansicht in ecoDMS: Die klassische Darstellung

4.1.2 Configure Table

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

4.1.2.1 Hide Columns

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

1. Right-click a column ribbon in the table.
2. Select the "Show/Hide Columns" command
3. A list containing the available columns opens
    a) If the checkbox is disabled, the column is not displayed in the table.

4.1.2.2 Show Columns

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

1. Right-click a column ribbon in the table.
2. Select the "Show/Hide Columns" command
3. A list containing the available columns opens
    a) If the checkbox is enabled, the column is displayed in the table.

4.1.2.3 Adjust Columns to Content

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

1. Right-click a column ribbon in the table.
2. Select the "Adjust Columns to Content" command
3. The columns are adjusted to the current contents.

4.1.2.4 Adjust Columns to Content (Automatic)

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

1. Right-click a column ribbon in the table.
2. Select the "Adjust Columns to Content (Automatic)" command
3. The columns are automatically adjusted to the contents.

4.1.2.5 Show All Columns

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

1. Right-click a column ribbon in the table.
2. Select the "Show All Columns" command

4.1.3 Sort Table

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

1. Click the title of the column you want to sort by.
    a) ecoDMS sorts the displayed documents according to the selected column.
2. The arrow above the column title indicates whether the sorting order is ascending or descending.
    a) To switch between descending and ascending order, click the column again.

4.2 Highlight Unread Documents

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

1. At the bottom right of ecoDMS Client, there is an entry called "Highlight Unread Documents".
2. If you enable the checkbox, unread documents are highlighted until they are opened for the first time ("Show" function).

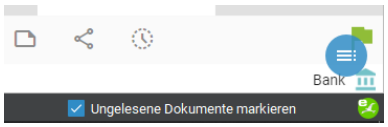


Figure 4.8: Highlight Unread Documents

4.3 Configure Toolbars

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

1. In the ecoDMS menu, click "Options - Configure Toolbars".
2. The "Configure Toolbars" dialog opens.

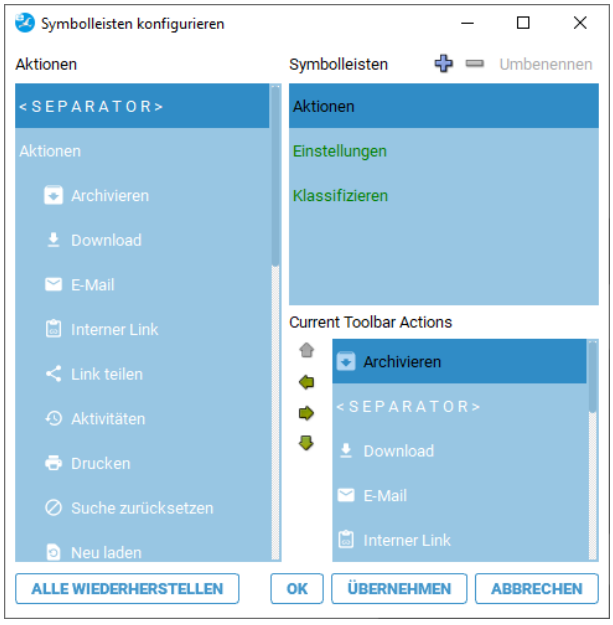


Figure 4.9: Configure Toolbars

4.3.1 Create New Toolbar

To create a new toolbar:

1. In the Toolbars area, click the + Icon.
2. The client creates a toolbar with the name "Custom Toolbar".
3. Overwrite this name with your description.
4. Then press "Enter".

4.3.2 Delete Toolbar

You can delete the toolbars you have created.

1. Select the toolbar you want to delete in the Toolbars area.
2. Now click the - icon.
3. You have deleted the toolbar.

4.3.3 Add Toolbar Actions / Icons

You can add more actions / icons to the toolbars:

1. Select the toolbar you want to edit in the Toolbars area.
2. Select the icons in the "Actions" area. Click the Right Arrow to add the selected icons to your toolbar.
3. You can repeat this process to add more icons.

4.3.4 Remove Toolbar Actions / Icons

You can delete actions / icons in custom toolbars:

1. Select the toolbar you want to edit in the Toolbars area.
2. In the Assigned Toolbar Actions area, select the icon you want to delete. Now click the Left Arrow to delete the selected icons from your toolbar.
3. You can repeat this process to delete more icons.

4.3.5 Change the Order of Toolbar Icons/Actions

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

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

4.3.6 Restore All

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

4.4 Manage Desktop

There are several functions to help you manage your desktop.

4.4.1 Save Desktop Settings

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

1. Click "View - Save Desktop Settings"
2. Select the storage location for your "Desktop Settings".
3. Confirm your selection with "OK".

4.4.2 Load Desktop Settings

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

1. Click "View - Load Desktop Settings".
2. Select the saved file on your file system.
3. Confirm your selection with "OK".

4.4.3 Reset Desktop

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

1. In the menu click "View - Reset Desktop".
2. Confirm then the message in the dialog with "OK".
    a) The desktop will now be reset to the initial state.

4.4.4 Reload Desktop

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

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

1. Click the "Update" icon in the toolbar **or**
2. In the menu click "View - Reload Desktop".

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

4.4.5 Minimise / Maximise / Restore Client

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

4.5 Windows / Area Visibility

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

- Status
- Favorites
- Folder
- Preview

4.5.1 Hide Windows

1. Right-click the toolbar or menu bar
2. Remove the ticks for all entries you do not want to show

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

4.5.2 Show Windows

1. Right-click the toolbar or menu bar
2. Tick all entries you want to show

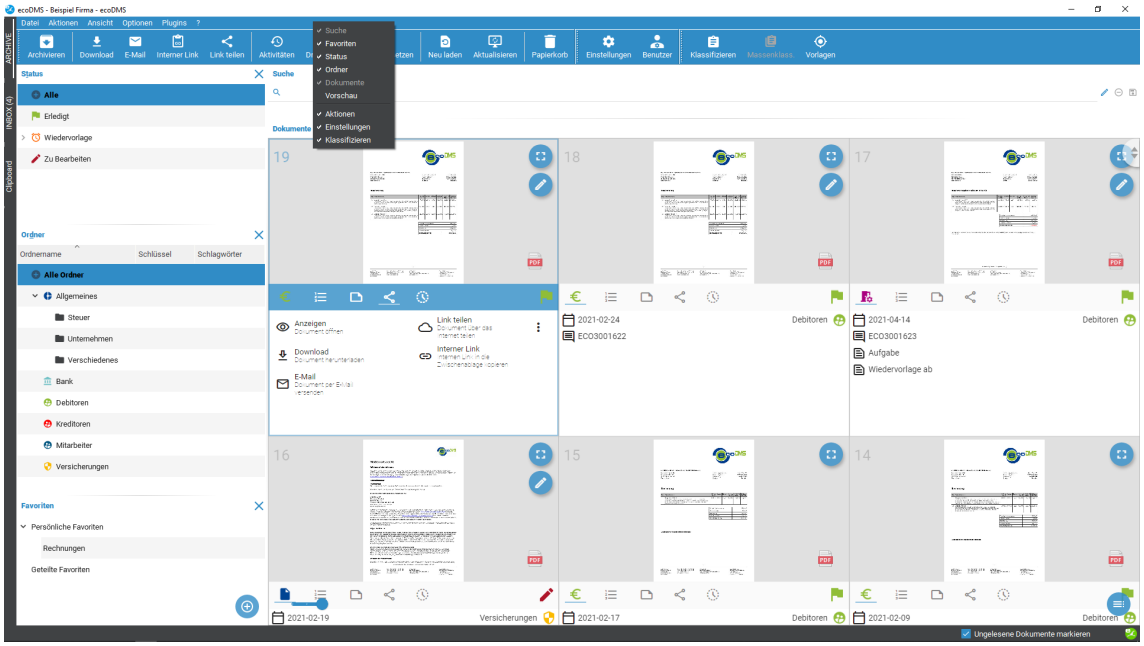


Figure 4.10: Visibility of Windows in ecoDMS (Here: Card View)

4.6 Show/Hide Notifications

- ecoDMS displays a notification when saving and executing certain functions (e.g. when saving the user administration).
- You can disable these notifications by enabling the checkbox "Do not show this dialog again".
- If you want to restore all warnings, click "View -> Reset Desktop" in the main menu.

5 Login, Connection Manager

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

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

5.1 Opening the Connection Manager

There are several ways to open the Connection Manager:

1. **Via the Desktop**
    a) If the Connection Manager icon is not displayed in the system tray (usually at the bottom right near the date):
        i. You can open the Connection Manager by double-clicking the desktop icon.
    b) If the icon is active in the taskbar:
        i. You can also open the Connection Manager by double-clicking the "Desktop Icon."
2. **Via the Program Management**
    a) If the Connection Manager is not visible in the system tray:
        i. You can start it through the program management.
        ii. The Connection Manager icon will then appear in the system tray.
    b) Right-click the Connection Manager icon in the system tray and select "Profiles."
        i. The Connection Manager program interface will open.
3. **Via the System Tray**
    a) Right-click the Connection Manager icon in the system tray and select "Profiles."
        i. The Connection Manager program interface will open.

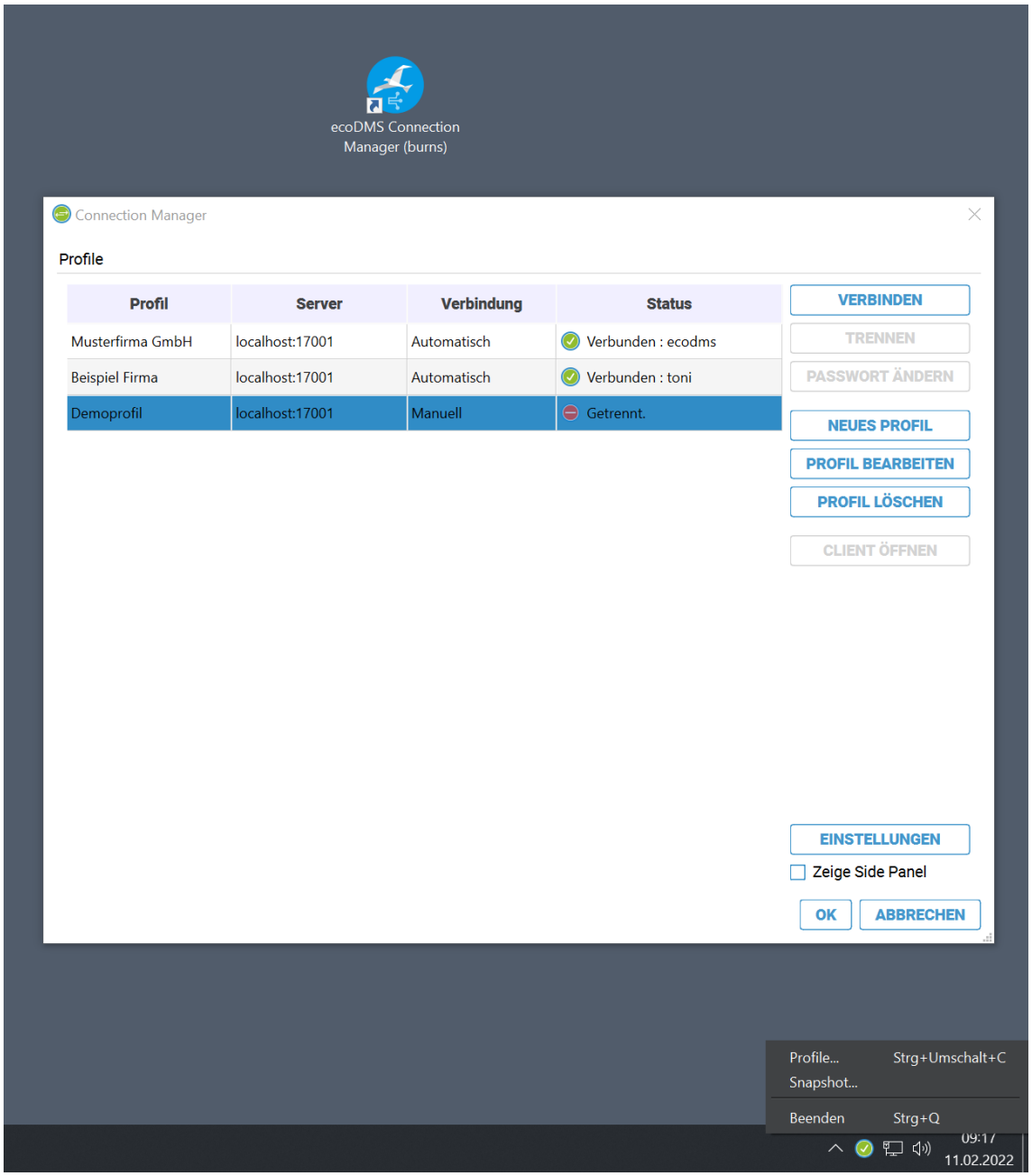


Figure 5.1: Connection Manager

5.2 Exit Connection Manager

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

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

Attention: The connection with ecoDMS Server is only terminated if ecoDMS Client is closed and the connections have been disconnected in the Connection Manager at the respective workstation. Simply disconnecting the Connection Manager or closing the client will not unblock a license. To do this, close or disconnect all ecoDMS components and the Connection Manager at the workstation.

Note: You can find the Connection Manager on your toolbar. In Windows the icon usually displays next to the time. Depending on the number of other applications running on your PC, Windows hides some icons. Use the arrow to display the hidden icons. The same applies to Ubuntu and macOS.

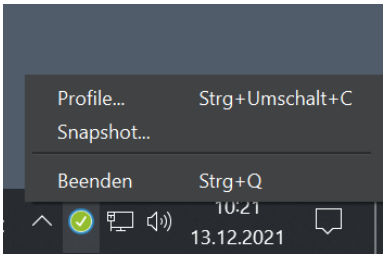


Figure 5.2: Connection Manager - Exit

5.3 Profile Icons - Description

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

	No Connection
	Connecting
	Connection Established

5.4 Client-Server Communication

ecoDMS Server and its clients communicate via TLS encryption.

5.5 Access from Outside

In order to access ecoDMS from outside,

- you must activate ecoDMS Server port accordingly.

- In the case of a firewall, the access to port 17001 must be approved in a default installation of ecoDMS.
- Alternatively, you can allow access via VPN connection
- or use the ecoDMS Web client with enabled remote access (Settings - Web Service) (Refer to the ecoDMS Web Client manual for more details).

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

5.6 Create Profiles and Log In

Important Notes::

- You can create as many profiles as you like.
- The number of concurrent connections depends on your license.
- If the maximum number is exceeded, an error message will appear.
- After several incorrect login attempts, access will be blocked for approximately 10 minutes.

With the ecoDMS Connection Manager, you can connect to the ecoDMS Server using so-called profiles. Here's how to create a new profile:

1. Open the ecoDMS Connection Manager
2. Click on "New Profile"
3. Provide the following information:
   a) **Profile Name:** Any name, e.g. company name or server name, to easily identify the desired profile (e.g. also when using Addons and Plugins)
   b) **Server:** IP address of the ecoDMS Server or "localhost" for local installation.
   c) **Port:** Default is "17001".
   d) **Check Connection:** Click "Check Connection" so that the archive is loaded.
   e) **Archive:** After a successful connection, the "Standard Archive" will be loaded (other archives can be selected if available from "older installations").
   f) **Username & Password:** Enter your login credentials (see the Manual 41 or contact your administrator).
      i. After successful verification, username and password can be saved in the profile – for automatic or manual login.
   g) **Shortcut Search (OPTIONAL):** Use a defined shortcut key to search ecoDMS directly from any application using selected text – results will be displayed in the ecoDMS Client (see also 16.6).

h) **Connect Automatically:** Check this box if the profile should be connected automatically at every start (uses a license / concurrent connection).

   i. The connection is only fully terminated when all clients are closed and disconnected in the Connection Manager.

i) **Save**: The connection will be established and you can begin working with the ecoDMS Client.

j) **Cancel**: Cancels the process.

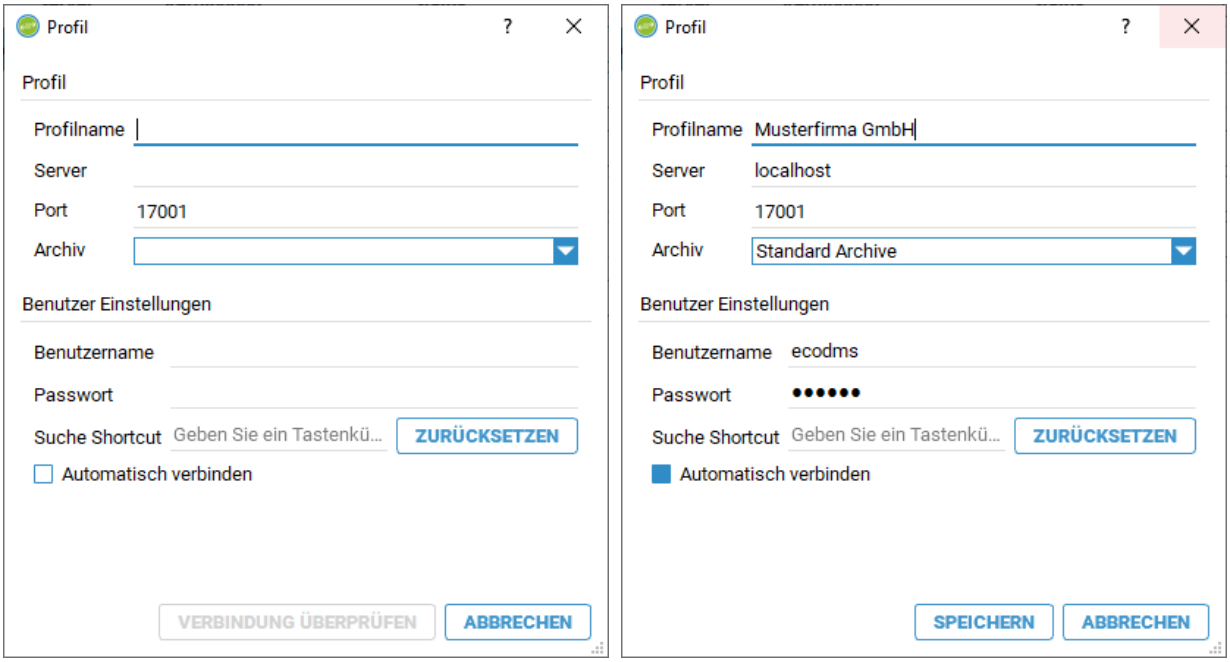


Figure 5.3: Connection Manager - Create and Edit Profile

5.7 Connect Profile

There are two ways to connect a profile:

1. **Connect Automatically:** If the "Connect Automatically" option is active, the profile connects automatically when the Connection Manager starts.
2. **Connect Manually:** Without automatic connection, you must connect the profile manually. Depending on the profile, the user data is either already entered or must be provided.
   a) Select the desired profile in the Connection Manager.
   b) Click on "Connect".

5.8 Multi-Factor Authentication for Login

- The chapter 6.2.2 describes the activation of multi-factor authentication (MFA) in detail.
- ATTENTION: The time must be synchronized on the server:

```
Example:
Smartphone: UTC+1: 15:00, Server UTC-9 04:00 - works
Smartphone: UTC+1 15:00, Server UTC+1 14:45 - does not work
```

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.

5.8.1 Set up the Authentication App

To use an authentication app to log in to ecoDMS, proceed as follows:

1. Install a matching app on your device (e.g. smartphone, tablet)
   a) Examples: Google Authentificator, Mircosoft Authentificator, Apple Keychain
2. Open your authentication app
3. Add an account in the app and scan the provided ecoDMS barcode
   a) The administrator can provide a barcode of this type for each user (see 6.2.2.2).
   b) Already connected profiles can display the barcode in the Connection Manager (see 5.8.2)
   c) The barcode is also displayed the first time you connect with MFA.

5.8.2 Display Activation Barcode

If (for example) you want to use a new or additional device to create the authentication code, this device must first be connected to the ecoDMS MFA function. The "MFA Barcode" button is available in the Connection Manager for this purpose.

1. Make sure that your profile in the Connection Manager is connected to the document management system.
   a) If your profile is not connected, please contact your ecoDMS administrator. An administrator can create the required barcode as a PDF via the ecoDMS user management (see 6.2.2.2).
2. Select your profile
3. Click the "MFA barcode" button
4. Enter your known ecoDMS password

5. The window for multiple authentication with the barcode is displayed
6. Open your authentication app (e.g. Google Authenticator, Microsoft Authenticator, Apple Keychain)
7. Add a new account
8. Scan the displayed barcode with the app

5.8.3 Connect Automatically

1. If a profile has the "Connect automatically" setting, the multi-factor authentication query only occurs the first time you connect after activating the MFA feature.
2. Depending on the settings, the code is provided either by authentication app, email or by scanning a barcode.
   a) Validity of the codes via app: 30 seconds
   b) Validity of the codes by e-mail: 5 minutes
   c) Blocking occurs after 6 incorrect entries
3. Enter the code in the displayed window in the "OTP" area to continue with the login to the document management system.

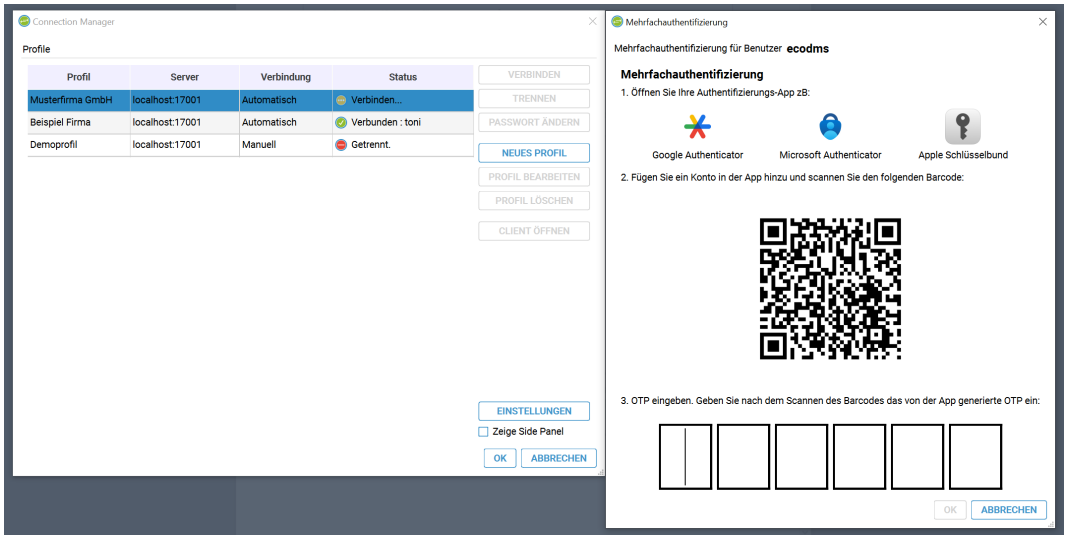


Figure 5.4: ecoDMS Connection Manager - Login via Multi-Factor Authentication (MFA) - Connect Automatically

5.8.4 Connect Manually

1. If MFA is enabled and the "Connect manually" setting is saved in the profile, multi-factor authentication takes place as soon as a user wants to reconnect to the document management system.
2. If a user clicks on "Connect" after entering the user data, the security code has to be entered in the next step.
   a) The barcode for the app is only displayed in the query dialog the first time the profile is connected. After that, only the OTP is queried.

3. Depending on the settings, the code is provided either by authentication app or email.
   a) Validity of the codes via app: 30 seconds
   b) Validity of the codes by e-mail: 5 minutes
   c) Blocking occurs after 6 incorrect entries
4. Enter the code in the displayed window in the "OTP" area to continue with the login to the document management system.

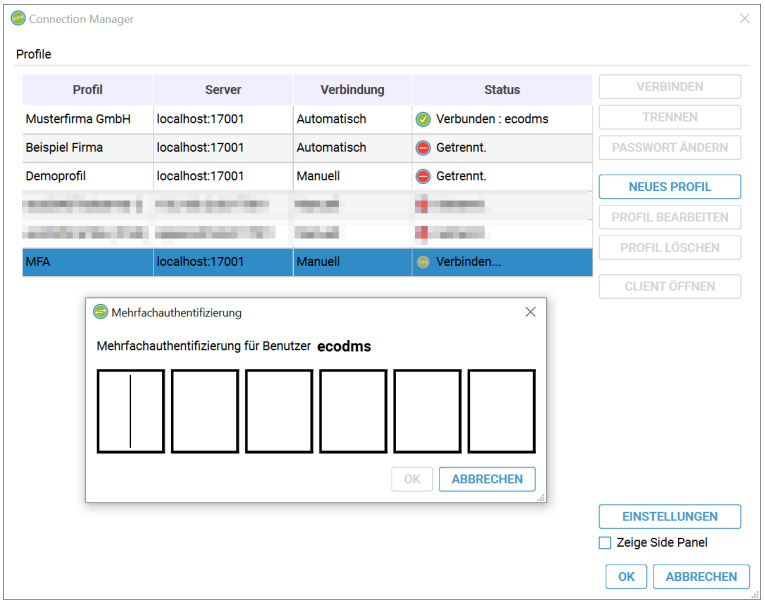


Figure 5.5: ecoDMS Connection Manager - Login via Multi-Factor Authentication (MFA) - Connect Manually

5.9 Disconnect Profile

- The connection to the ecoDMS Server is only fully terminated when all clients are closed and the connections are disconnected in the Connection Manager.
- Simply closing the Connection Manager or the clients is not enough to release the license.
- All ecoDMS components and the Connection Manager must be completely closed or disconnected on the work-station.

To end the connection to ecoDMS Server:

1. Open the ecoDMS Connection Manager.
2. Select the profile in the table.
3. Click "Disconnect" to disconnect the profile from the server.

5.10 Edit Profiles

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

1. Open the ecoDMS Connection Manager.
2. Select the profile in the table.
3. Click "Disconnect" to disconnect the profile from the server.
4. Click the "Edit Profile" button.
5. Enter the appropriate information in the dialog (see 5.6).

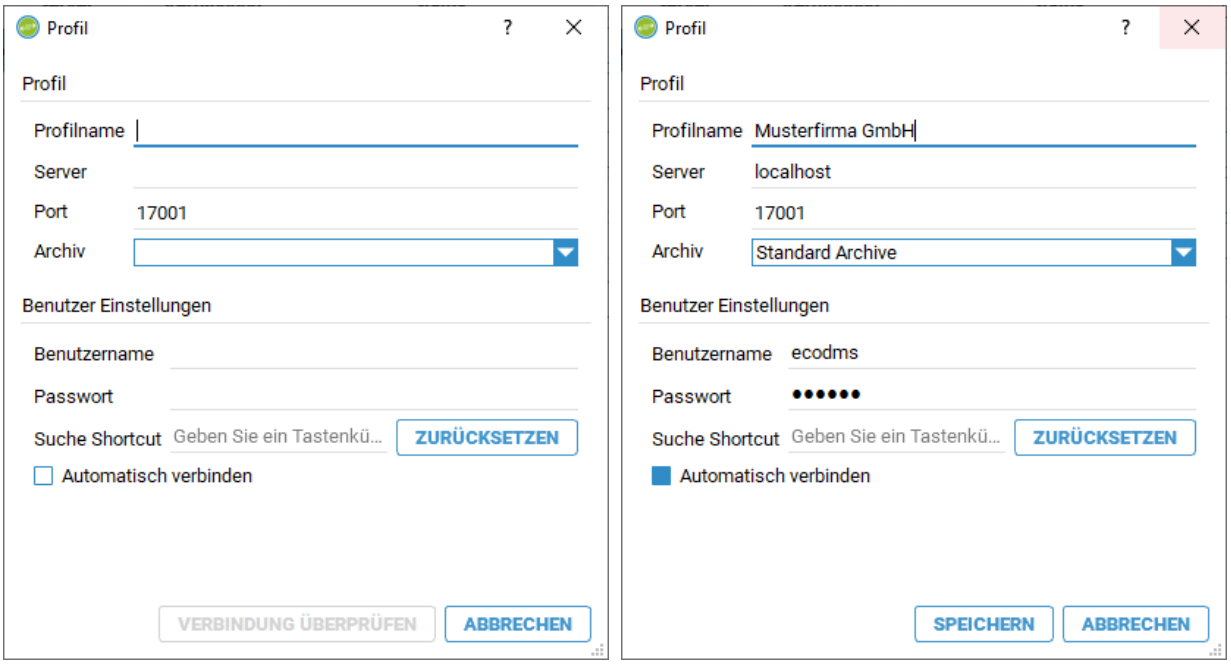


Figure 5.6: Connection Manager - Create and Edit Profile

5.11 Delete Profile

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

1. Open the ecoDMS Connection Manager.
2. Select the profile in the table.
3. Click "Disconnect" to disconnect the profile from the server.
4. Click the "Delete Profile" button.
5. Confirm the warning message with "Yes" to permanently remove the profile. Click "No" to cancel the operation.

5.12 Change Password

Please refer to section 6.5 in this manual.

5.13 Open ecoDMS

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

1. Double-click the ecoDMS icon on your desktop or on your toolbar **or**
2. Select the ecoDMS programme file in the programme manager of your operating system **or**
3. Click the button "Open Client" in the Connection Manger.

Then the programme starts. The ecoDMS start screen displays.



Figure 5.7: ecoDMS Desktop Icon

5.14 Exit ecoDMS

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

1. Click the "Exit" icon of the title bar. **or**
2. Select "File - Exit" from the menu. **or**
3. Use this keyboard shortcut: CTRL+ Q

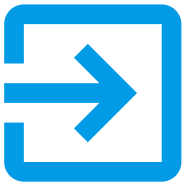


Figure 5.8: Exit ecoDMS Software

6 Users, Groups, Passwords

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

Roles / Group System

- ecoDMS uses a Roles System. Roles are the users, groups and permissions within the system a role can also include more users and act as a group. System permissions and user groups can or should be assigned to each user. The system permissions decide which functions are available to the user. These can be different depending on the user.
- Moreover, we recommend that a role (user group) is created for each team in the company. For example, a common role can be assigned to all employees in the Accounting department. The same applies to the management, sales an all other departments and groups in a company. This structure allows a detailed and straightforward assignment of folder and document permissions. You have the following options to assign "roles" and "groups".

Default User

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

Save Settings

Changes in user and role management only take effect after the respective users restart the client. If you want to hide this message box in future, enable the checkbox "Do not show this message again".

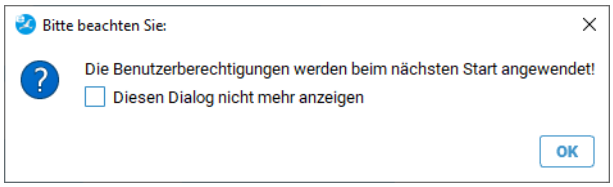


Figure 6.1: Meldung - Die Benutzerberechtigungen werden beim nächsten Start angewendet

6.1 Permissions

In the following the system privileges are explained. You can also read here how you can assign user permissions.

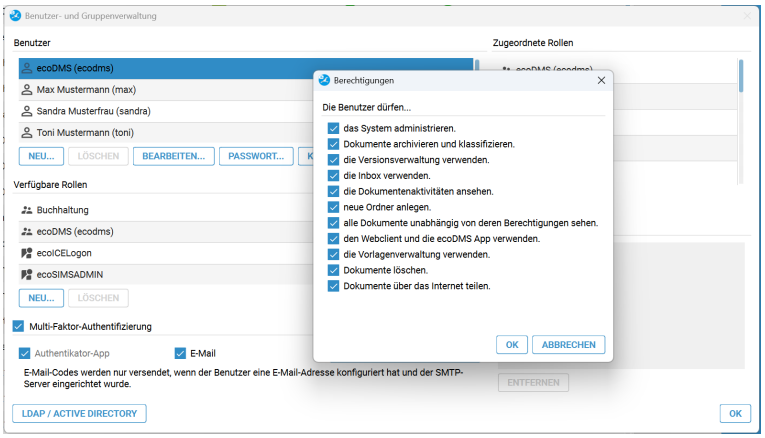


Figure 6.2: User and Group Management: System Permissions

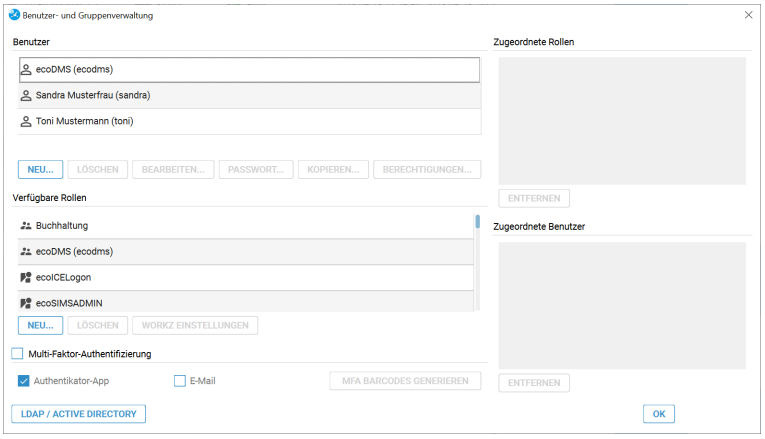


Figure 6.3: User and Group Management

6.1.1 System Permissions

The user is allowed to...

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

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

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

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

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

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

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

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

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

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

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

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

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

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

8. **Use The Web Client And The ecoDMS ScanApp = ecoSIMSWEBCLIENT**

   The role "ecoSIMSWEBCLIENT" is required in order to be allowed to use the web services of ecoDMS. These include, among others, the web client and the ecoDMS ScanApp.

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

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

10. **erase documents. = ecoSIMSDELETE**

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

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

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

12. **ecoSIMSUSER**

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

13. **scanner**

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

6.1.2 Assign Permissions via dialog

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

1. Select the user in the "Users" area of the "User and Group Management".
2. Click the "Permissions" button.
3. The available permissions are displayed in a new dialog. Select the permissions by checking them.
4. Save your settings with "OK" or cancel the operation with "Cancel".

6.1.3 Delete Permissions via dialog

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

1. Select the user in the "Users" area of the "User and Group Management".
2. Click the button "Permissions".
3. The available permissions are displayed in a new dialog. Disable the permissions by removing the check mark.
4. Save your settings with "OK" or cancel the operation with "Cancel".

6.1.4 Assign Permissions via Drag & Drop

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

1. Method

1. Select the user in the "Users" area of the "User and Group Management".
2. Select the roles separately in the "Available Roles" window and drag them via Drag & Drop to the "Assigned Roles" area.

2. Method

1. Select the role in the "Available Roles" window of the "User and Group Management".
2. Select the users separately in the "Users" area and drag them via Drag & Drop to the "Assigned Users" area.

6.1.5 Delete Permissions Directly

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

1. Method

1. Select the user in the "Users" area of the "User and Group Management".
2. Select the roles you want to delete separately in the "Available Roles" window.
3. Click the "Remove" button.

2. Method

1. Select the role in the "Available Roles" window of the "User and Group Management".
2. Select the users you want to delete separately in the "Assigned Users" area.
3. Click the "Remove" button.

6.2 User Management

ecoDMS provides several options for creating and managing users.

1. **You can create and manage roles (users) directly from the User and Group Management.**
   and/or
2. **If you use LDAP or Active Directory services, you can connect them with ecoDMS.**

This section explains how to create and manage the roles (users) directly from ecoDMS.

To open User and Group Management, click:

1. Menu -> Options -> Users **or**
2. Toolbar -> "Users" icon



Figure 6.4: Icon: User and Group Management

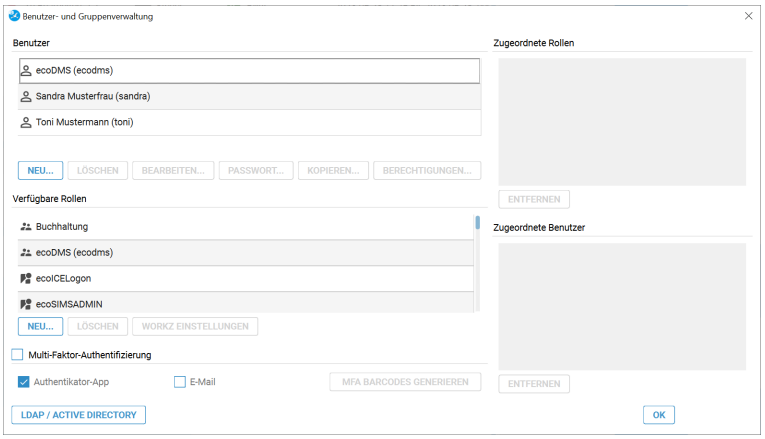


Figure 6.5: User and Group Management

6.2.1 Create New User

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

To add a new user, complete the following steps:

1. In the "User" window, click the "New" button.
2. A dialogue box opens. Enter the following user data:
   a) **Name (mandatory field):** Enter the name of the user. As a rule, you enter first name and surname.
   Example:

   ```
   Sandra Musterfrau
   ```

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

   ```
   mm
   ```

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

   ```
   sandra
   ```

   d) **E-Mail:** To receive email notifications, users must enter their email address in ecoDMS (also refer to 39.5 and 7.4.6). Entering an email address is optional.

   Example:

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

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

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

3. Confirm your entry with "OK"

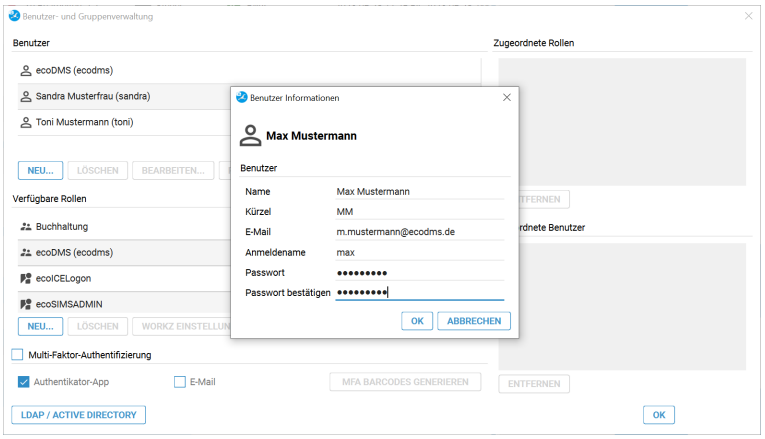


Figure 6.6: User and Group Management: Create New User

6.2.2 Multi-Factor Authentication (MFA)

- The section 5.8 describes login using multi-factor authentication (MFA) in detail.
- If you use the ecoDMS API, please also note the information in chapter

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.

6.2.2.1 Enable MFA

MFA can be activated globally for all users by the administrator:

1. Log in to ecoDMS with your administrator credentials.
2. Navigate to "User and group Management".
3. Activate the "Multi-factor authentication" checkbox.
4. Select the desired MFA methods:
   a) **Authentication app:** Enabled by default. Users need a smartphone app that generates temporary codes. These apps are usually available free of charge in the stores of the respective device manufacturer
   b) **Email:** Enable this option if users do not have an app or would also like to receive a code by email.
      i. For MFA by e-mail, a valid e-mail address must be defined in the user profile and the SMTP server must be configured.

5. If MFA has been newly enabled, the process must be completed by the administrator by entering an OTP code in order to save.

6.2.2.2 Generate MFA Barcodes

1. Click the "Generate MFA barcodes" button to create barcodes for the login.
2. The barcodes are created as a PDF for all available users
3. The user uses the smartphone to scan the appropriate barcode for activation in the respective authentication app (see 5.8)

6.2.3 Edit User

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

1. Select the user you want to edit in the "User" area of the "User and Group Management" section.
2. Click the "Edit" button.
3. The "User Information" dialog box opens. Here you can edit the following information:
   a) **Name (mandatory field):** Enter the name of the user. As a rule, you enter first name and surname.
   Example:
   ```
   Max Mustermann
   ```
   b) **Acronym:** Here you can enter a short form of the name. This is optional.
   Example:
   ```
   mm
   ```
   c) **E-Mail:** To receive email notifications, users must enter their email address in ecoDMS (also refer to 39.5 and 7.4.6). Entering an email address is optional.
   Example:
   ```
   m.mustermann@ecodms.de
   ```
   d) **Sign-in name:** You cannot change the sign-in name.
4. Confirm your entry with "OK"

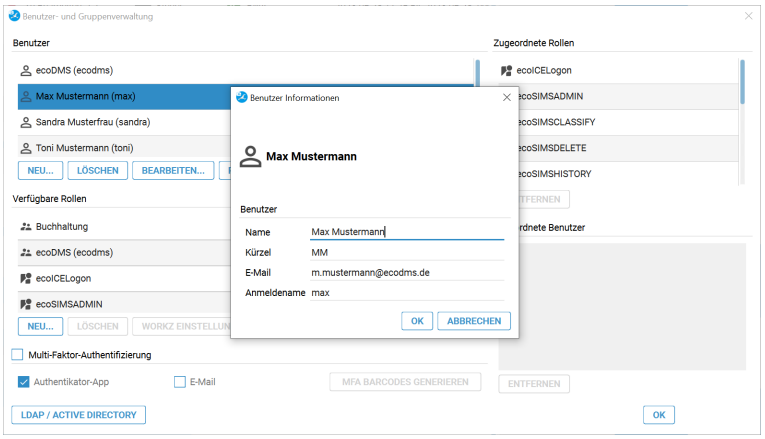


Figure 6.7: User and Group Management: Edit User

6.2.4 Copy User

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

1. Select the user you want to copy in the "Users" area of the "User and Group Management".
2. Click the button "Edit".
3. A dialog opens. Enter the user information.
   a) **Name (mandatory field):** Enter the name of the user. As a rule, you enter first name and surname.
   Example:

   ```
   Max Mustermann
   ```

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

   ```
   mm
   ```

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

   ```
   max
   ```

   d) **E-Mail:** To receive email notifications, users must enter their email address in ecoDMS (also refer to 39.5 and 7.4.6). Entering an email address is optional.

   Example:

   ```
   m.mustermann@ecodms.de
   ```

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

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

4. Confirm your entry with "OK" or cancel the operation with "Cancel".
5. The new user is created. You can see the same permissions like the copied user in the "Assigned Roles" area.

6.2.5 Erase User

Please note:

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

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

1. Select the user in the "Users" window of the User and Group Management section.
2. Then click "Erase".
3. Select to which role you want to transfer the user permissions.
4. Confirm your selection with "OK".
5. To complete the erasure procedure, confirm with "Yes" when prompted.
6. The user is now irrevocably erased from the system. You cannot undo this operation.

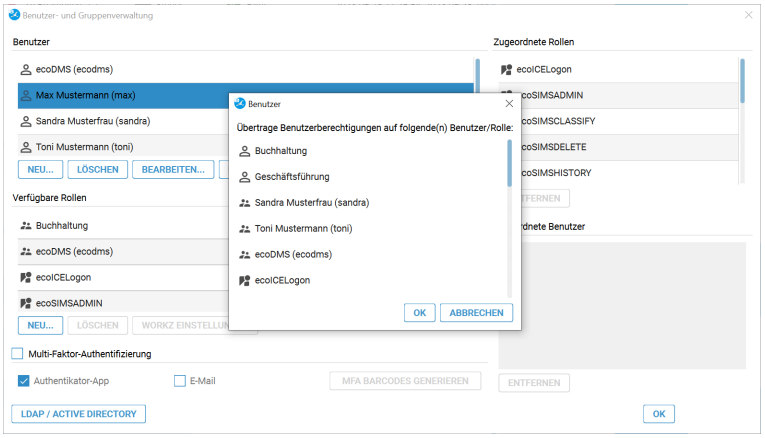


Figure 6.8: User and Group Management: Erase Users and Transfer Permissions

6.3 LDAP / Active Directory Management

- **Licensing: You require a license for the full version in order to use LDAP and Active Directory. You can test the functions in the free trial version before making a purchase. If you do not enter a valid license for the full version after the trial phase, you can no longer register with the LDAP/AD users you created.**
- **Recommendation: With the LDAP/AD menu you can filter by members/users of an AD/LDAP group and assign the same permissions to them. We therefore recommend you already create groups with the respective users for ecoDMS in LDAP/AD. Then you can create a filter for each group so that the users are displayed in the dialog. The same permissions can now be assigned to all members of this group.**
- **Login: The users are then registered in the Connection Manager with the user login credentials from the LDAP/AD.**

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

- Active Directory (AD) is the Microsoft Windows server directory service. You can use this component to configure a network according to the company structures. To do this, different configurations and devices such as, for example, services, users, groups, permissions, scanners and printers, including their settings, are administered in a central network. With active directory, the responsible administrators can organise, provide and monitor this information.
- Since Windows Server 2008, active directory consists of five different roles. One of these roles is the LDAP directory. LDAP stands for Lightweight Directory Access Protocol and provides, among others, information on users and their associated groups. You can use this protocol and a specific syntax to request information from an LDAP directory.

6.3.1 LDAP/ Active Directory Open dialog

1. Open the User and Group Management in ecoDMS Client.
2. Click "LDAP / Active Directory".
3. The "LDAP / Active Directory" dialog opens where you can manage services and users.



Figure 6.9: Symbol: User and Group Management

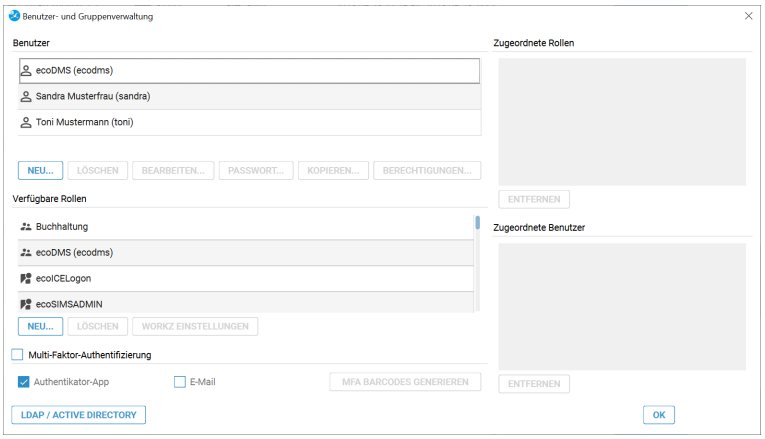


Figure 6.10: User and Group Management

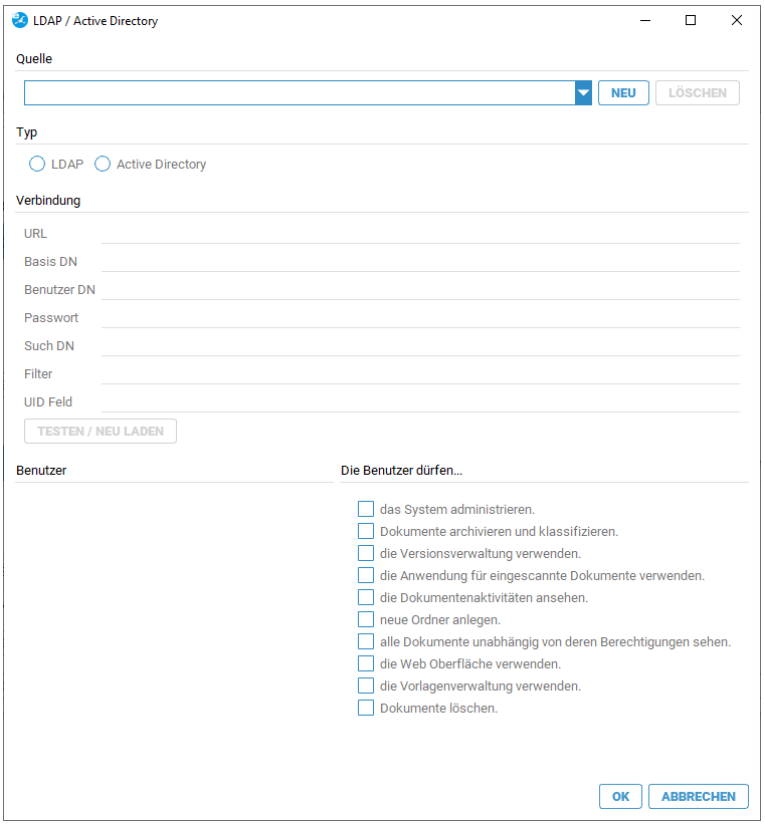


Figure 6.11: User and Group Management: LDAP / Active Directory

6.3.2 Create / Edit LDAP Profile

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

1. Open the LDAP / Active Directory dialog in the user and group management function.
2. Click "New".
3. The "New Profile" dialog opens.
    a) Assign a name to the profile in the "Name" entry field.

b) Select "LDAP" as "Type".

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

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

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

```
ldap://server01
```

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

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

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

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

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

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

h) **Email Field:** Here you can call user email addresses. To receive email notifications, users must enter their email address in ecoDMS (also refer to 39.5 and 7.4.6). Entering the email addresses is optional. The email address you configured there is used for LDAP/AD users. If an email address is saved for an LDAP/AD user, ecoDMS displays the email address in the user list behind the username, such as Max Mustermann (m.mustermann@ecodms.de).

Example values LDAP

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

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

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

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

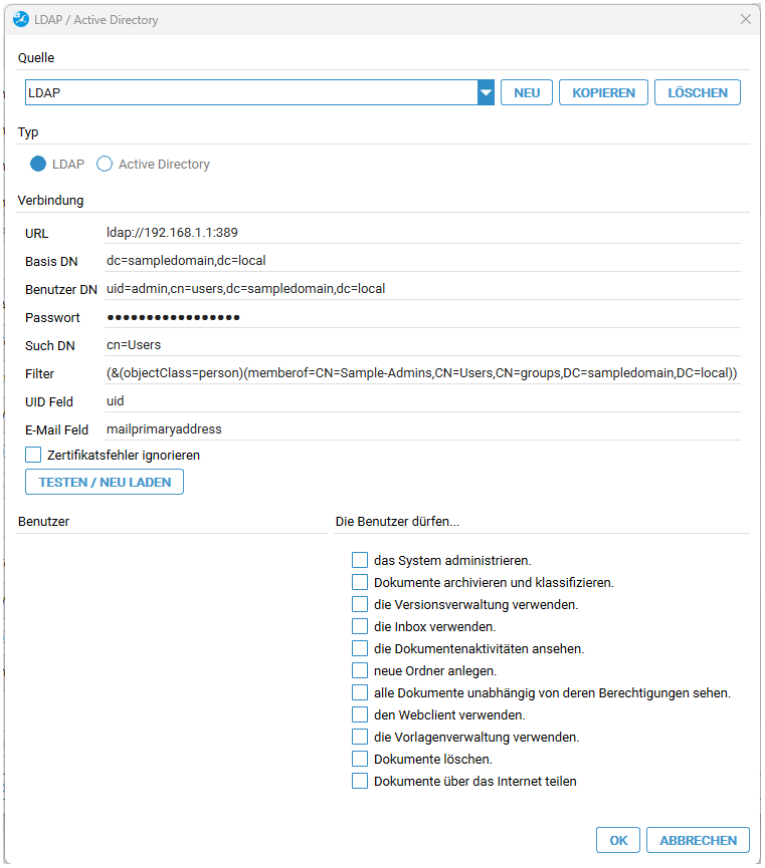


Figure 6.12: User and Group Management: Create new LDAP profile (example)

6.3.3 Create /Edit Active Directory Profile

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

1. Open the LDAP / Active Directory dialog in the user and group management function.
2. Click "New".
3. The "New Profile" dialog opens.
   a) Assign a name to the profile in the "Name" entry field.
   b) Select "Active Directory" as "Type".
   c) Confirm your entry with "OK" or cancel the operation with "Cancel".
4. Now enter the existing connection data of "Active Directory" in the "Connection" area.
   a) **URL:** Enter the host name or the IP address of the LDAP server used for user authentication. Example:

   ```
   ldap://server01
   ```

   b) **Base DN:** Enter the Base DN of your LDAP server here. The Base DN specifies from which place in a directory structure to start the search for specific objects.
   c) **User DN:** Enter the user name which ecoDMS uses for authentication with the LDAP server.
   d) **Password:** Enter the matching password here.

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

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

g) **UID Field:** In this field you can define the method with which you create the LDAP request to determine the user data.

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

```
userPrincipalName
```

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

h) **Email Field:** Here you can call user email addresses. To receive email notifications, users must enter their email address in ecoDMS (also refer to 39.5 and 7.4.6). Entering the email addresses is optional. The email address you configured there is used for LDAP/AD users. If an email address is saved for an LDAP/AD user, ecoDMS displays the email address in the user list behind the username, such as Max Mustermann (m.mustermann@ecodms.de).

Example values Active Directory

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

5. Click "Test / Reload" to check the entries and to load the user / group list.
6. Then assign the respective system permissions to the users. You can read more on permissions in the Permissions section.
7. Confirm the settings with "OK" or cancel the operation with "Cancel".

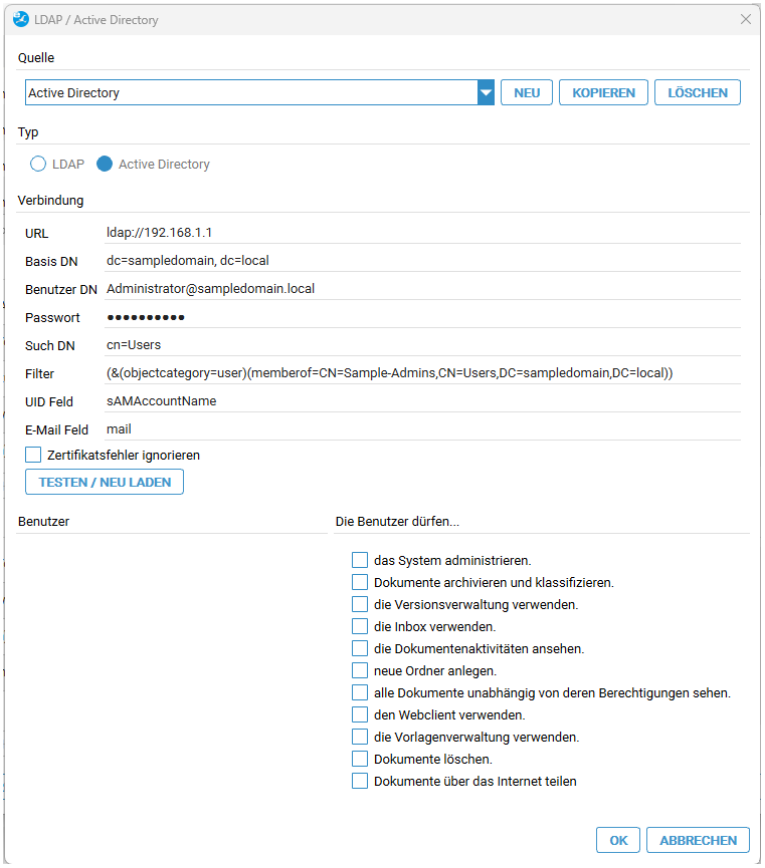


Figure 6.13: User and Group Management: Create new Active Directory profile (example)

6.4 Custom Groups (Roles)

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

6.4.1 Create Custom Group

To create your custom user group:

1. Click the "New" button in the "Available Roles" window of the User and Group Management.
2. A dialog opens. Enter the group / role name in the field "Role Name".
3. Save the role with "OK" or cancel the operation with "Cancel".

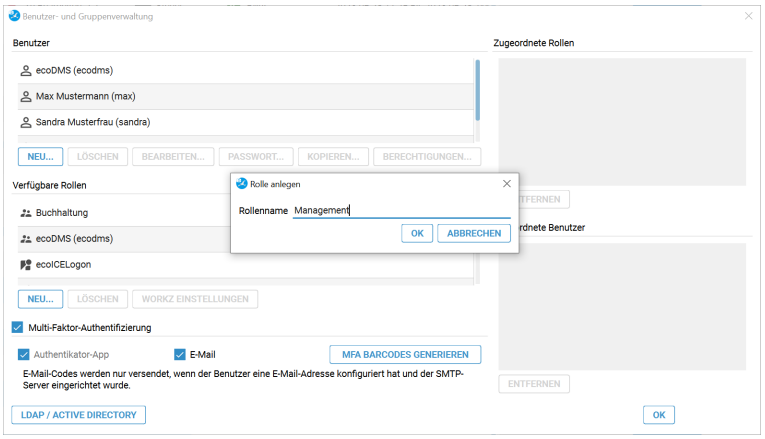


Figure 6.14: User and Group Management: Create New Role (Group) (Here: Accounting)

6.4.2 Assign Users to Group

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

1. Method

1. Select the user in the "Users" area of the "User and Group Management".
2. Select the groups (roles) separately in the "Available Roles" window and drag them via Drag & Drop to the "Assigned Roles" area.

2. Method

1. Select the group (role) in the "Available Roles" window of the "User and Group Management".
2. Select the users separately in the "Users" area and drag them via Drag & Drop to the "Assigned Users" area.

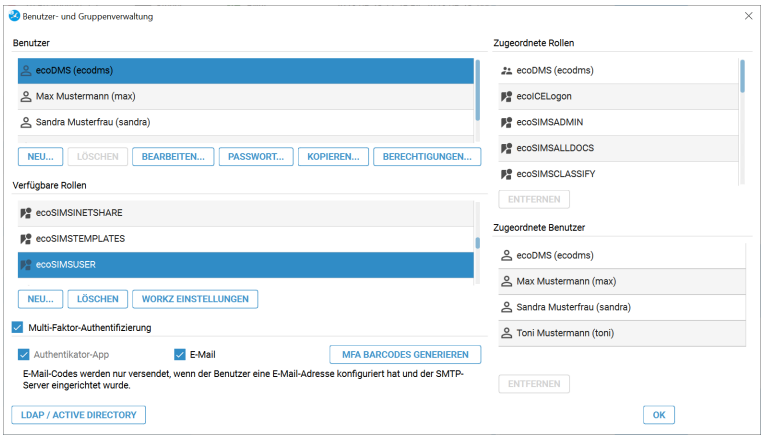


Figure 6.15: User and Group Management

6.4.3 Delete Users from Group

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

1. Method

1. Select the user in the "Users" area of the "User and Group Management".
2. Select the groups (roles) you want to delete separately in the "Available Roles" window.
3. Click the "Remove" button.

2. Method

1. Select the group (role) in the "Available Roles" window of the "User and Group Management".
2. Select the users you want to delete separately in the "Assigned Users" area.
3. Click the "Remove" button.

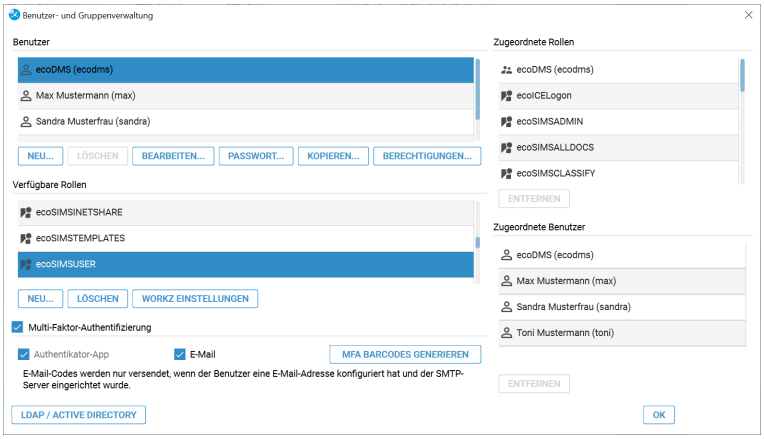


Figure 6.16: User and Group Management

6.4.4 Delete Custom Groups

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

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

6.4.5 Example: Custom Groups

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

6.5 Change Passwords

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

6.5.1 Change Password As Administrator

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

1. Select the user in the "User" area of the user and group management section
2. Click the "Password" button
3. A dialog opens. Enter the following information:
   a) **New password:** Enter the new password for the user
   b) **Confirm password:** You must confirm the password for security reasons
4. Confirm your entry with "OK" or abort the process with "Cancel"
5. Once you have successfully made the changes, the message "Your password has been changed successfully." appears
6. Confirm the message with "OK"

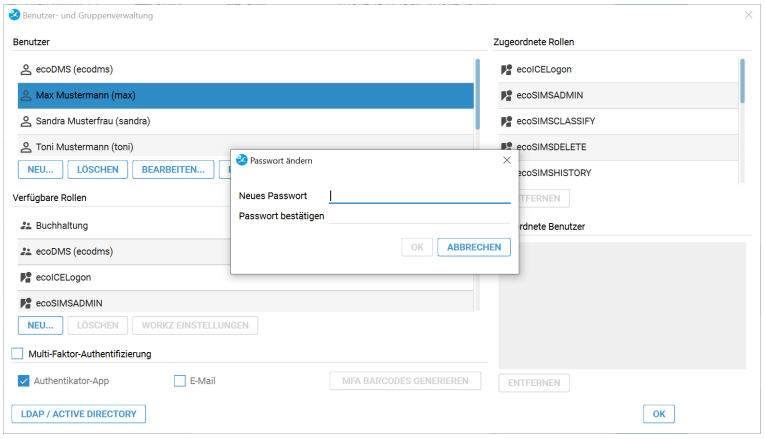


Figure 6.17: User and Group Management: Change User Password as Administator

6.5.2 Change Your User Password

Use the Connection Manager to change your password.

1. Open the ecoDMS Connection Manager
2. Connect with your user name and valid password
3. Click the button "Change Password"
4. A dialog opens. Enter the new password information
   a) **Password:** Enter the new user password here
   b) **Confirm Password:** The password must be confirmed for safety here
5. Confirm your entry with "OK" or cancel the operation with "Cancel"

6. The new password is now valid

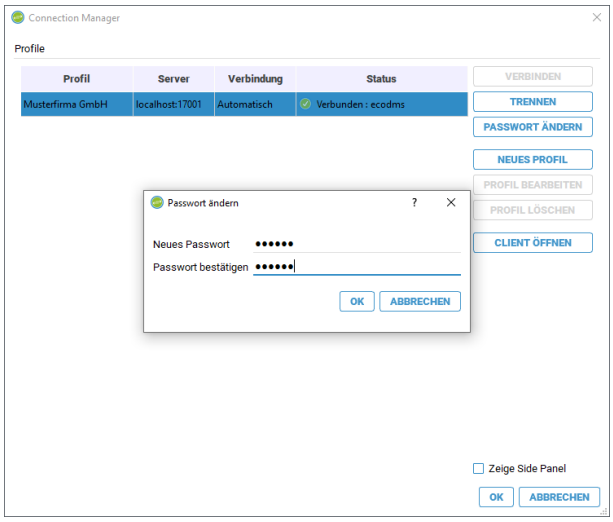


Figure 6.18: Connection Manager: Change Own User Password

6.5.3 System Administrator: Change Password

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

1. Open the ecoDMS Connection Manager
2. Connect with your user name of the system administrator and the valid password
    a) Refer to the chapter "Login Credentials" for the default login credentials of the "ecoSIMSAdmin" user
3. Click the "Change Password" button
4. Enter the following password information:
    a) **Password:** Enter the new user password here
    b) **Confirm Password:** The password must be confirmed for safety here
5. Confirm your entry with "OK" or cancel the operation with "Cancel"
6. The new password is now valid

6.5.4 User is locked: Reset Password

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

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

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

2. Complete the steps from the "Change Password as Administrator" section
3. The user can now access the system again. To do so, the user simply needs to log in with the user name and the new password

7 Settings

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

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

1. Menu -> Options -> Settings
2. Toolbar -> Settings Icon
3. Shortcut: CTRL + Alt + S



Figure 7.1: Symbol: Settings

7.1 Benutzer Sitzungen

In diesem Bereich verwalten Administratoren alle aktiven Verbindungen (Desktop, Web, Mobil). Dies dient der Übersicht und der gezielten Freigabe von Lizenzen für andere Benutzer.

- **Automatisches Timeout:** Inaktive Sitzungen werden standardmäßig nach 10 Minuten automatisch getrennt und aus der Liste entfernt.
- **Manuelles Beenden:** Administratoren können Sitzungen jederzeit manuell trennen, um zeitgleiche Verbindungen freizugeben.

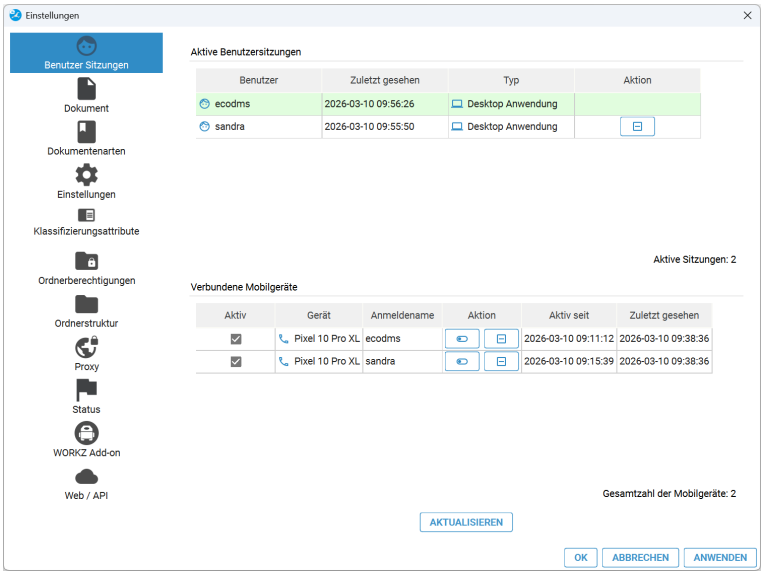


Figure 7.2: Einstellungen: Benutzer Sitzungen - Übersicht

7.1.1 Aktive Benutzersitzungen

Hier werden alle aktuell angemeldeten Desktop- und Web-Clients gelistet.

7.1.1.1 Sitzung beenden:

1. Gewünschten Benutzer auswählen (der eigene Benutzer kann nicht beendet werden).
2. In der Spalte Aktionen auf das Löschen-Icon klicken.
3. Bestätigen Sie mit Ja, um die Verbindung zu lösen und die Lizenz freizugeben.

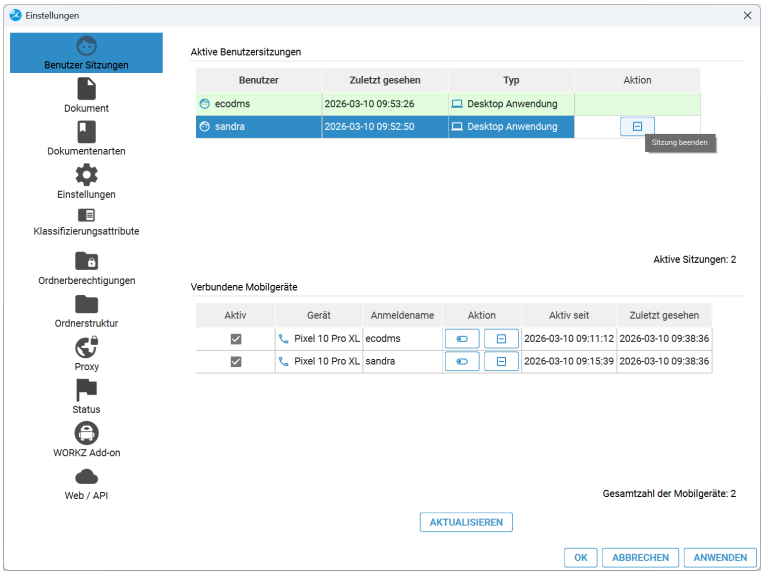


Figure 7.3: Einstellungen: Benutzer Sitzungen - Sitzung beenden (hier: Desktop)

7.1.2 Verbundene mobile Geräte (ecoDMS ScanApp)

Listet alle Mobilgeräte auf, die via ScanApp mit ecoDMS verbunden sind (inkl. Gerätename, ID und Status).

7.1.2.1 Geräteverbindung aktivieren & trennen:

1. Wählen Sie das entsprechende Gerät aus.
2. Nutzen Sie die Schalter im Bereich "Aktion"
   a) **Aktivieren:** Schalter auf der linken Seite.
      i. Ist ein Gerät aktiviert, erscheint ein Häkchen in der Spalte "Aktiv".
      ii. Über das Gerät können nun Dokumente via ecoDMS ScanApp in die Inbox geladen werden.
   b) **Deaktivieren:** Minus-Symbol auf der rechten Seite.
      i. Bestätigen Sie mit Ja, um die Verbindung zu trennen.

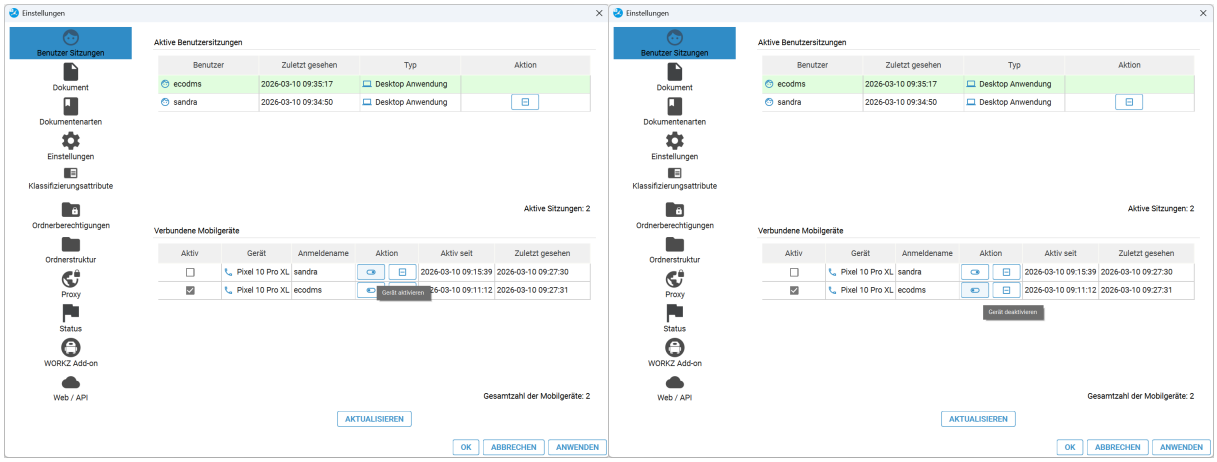


Figure 7.4: Einstellungen: Benutzer Sitzungen - Gerät aktivieren / deaktivieren

7.1.3 Aktualisieren

- Klicken Sie auf Aktualisieren, um die Ansicht manuell auf den neuesten Stand zu bringen. Das System prüft sofort alle aktiven Verbindungen und korrigiert die Listen.

7.2 Document

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

7.2.1 Settings

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

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

       ```
       yyyy-MM-dd
       ```

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

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

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

       ```
       _
       ```

2. Click "Apply" to save the settings or click "Cancel" to abort the process.

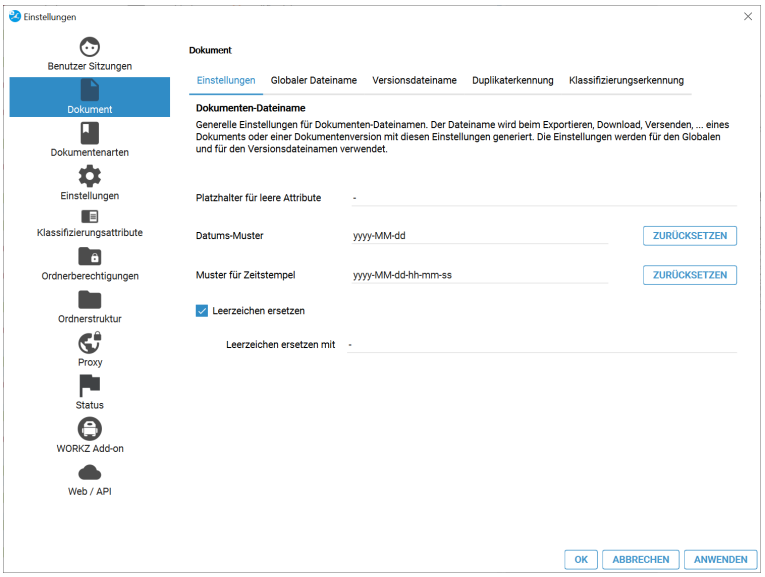


Figure 7.5: Settings: Document File Name (General Settings)

7.2.2 Global File Name

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

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

- The maximum length for the file name is 100 characters.
- Trailing spaces are truncated.
- The following characters are allowed for the name (others are removed)

  a-z

  A-Z

  0-9

  ä ü ö

  Ä Ü Ö

  ß

  . - *

7.2.2.1 Add Selected Attribute

1. Select the attribute you need in the required order from the list of available classification attributes
2. Click the "Add Selected Attribute" button.
3. The "File Name" section lists the attributes you want to use for the file name.
4. Click "Save" to save your settings or click "Cancel" to abort the process.

7.2.2.2 Add Text Field

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

1. Click the "Add Text Field" button.
2. The text field is inserted in the "File Name" section
3. Enter text using the permitted characters
4. Click "Save" to save your settings or click "Cancel" to abort the process.

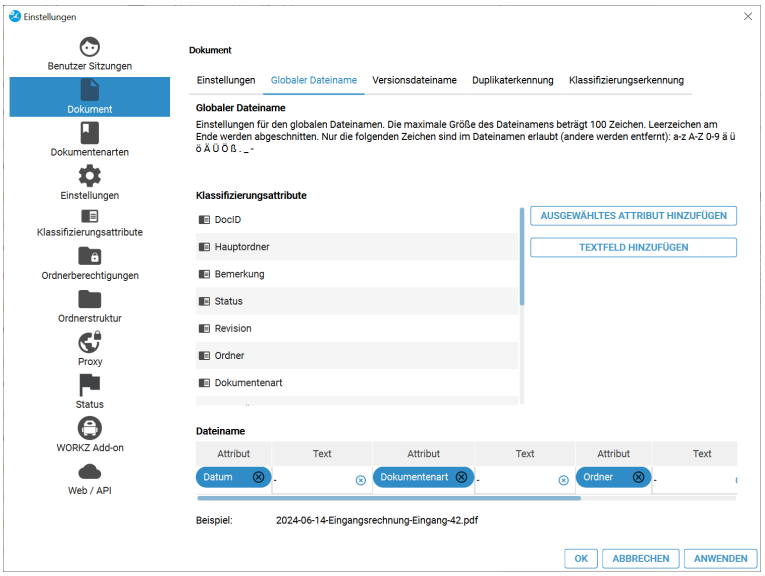


Figure 7.6: Settings: Global File Name (Here: Example Values)

7.2.3 Version File Name

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

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

- The maximum length for the file name is 100 characters.
- Trailing spaces are truncated.
- The following characters are allowed for the name (others are removed)

  a-z

  A-Z

  0-9

  ä ü ö

  Ä Ü Ö

  ß

  . - *

7.2.3.1 Add Selected Attribute

1. Select the attribute you need in the required order from the list of available classification attributes and version information
2. Click the "Add Selected Attribute" button

3. The "File Name" section lists the attributes you want to use for the file name
4. Click "Save" to save your settings or click "Cancel" to abort the process

7.2.3.2 Add Text Field

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

1. Click the "Add Text Field" button
2. The text field is inserted in the "File Name" section
3. Enter text using the permitted characters
4. Click "Save" to save your settings or click "Cancel" to abort the process.

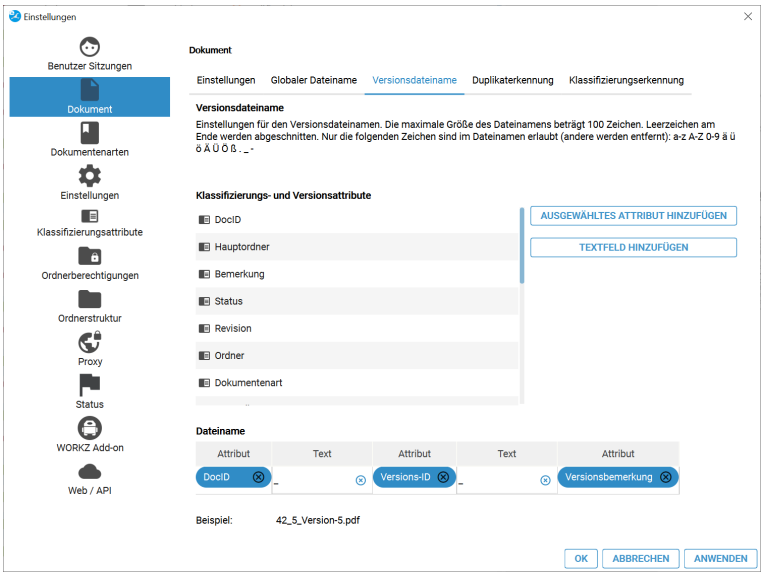


Figure 7.7: Settings: Version File Name (Here: Standard)

7.2.4 Duplicate Detection

- If you archive several documents at the same time, the check is carried out one after the other
- When using the API, please read the Swagger documentation.
- During dark processing (automatic archiving in the background: dark process), the document is sent to the inbox when the duplicate is detected.
- The duplicate detection for the scan input can be activated / deactivated in the settings under "Settings -> Scan input" (12.2.1.2)
- If the user is not authorized to access the document that is already in the archive, a message appears stating that a duplicate has been found. No preview is then shown here.
- Documents from the recycle bin are not taken into account.
- Attachments are not taken into account.

The duplicate detection feature in ecoDMS helps you to identify duplicate documents in the system. Before a new document can be archived in ecoDMS, it first runs through this automatic detection. If one or more duplicates are found, ecoDMS displays them. The user can then decide whether the new document should be archived or not.
This is how the duplicate detection is enabled and configured:

1. Activate the duplicate detection via the "Activated" checkbox
2. The "Sensitivity" slider is used to define the required match of documents for duplicate detection:
    a) **Low:** There may be minor discrepancies in the documents
        i. When archiving documents, any existing discrepancies to the already archived documents are displayed flashing in the duplicate dialog
    b) **High:** The documents must match exactly.
3. Save the process with "OK" or "Apply".

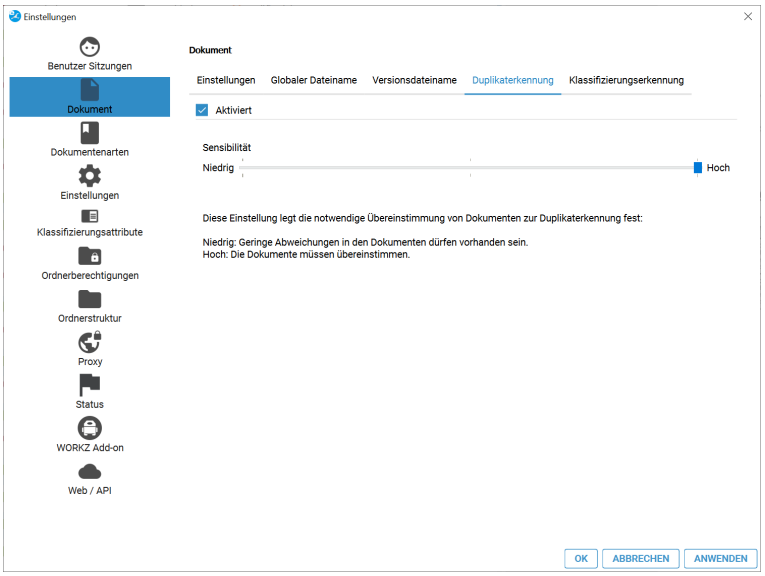


Figure 7.8: Settings: Document - Duplicate detection

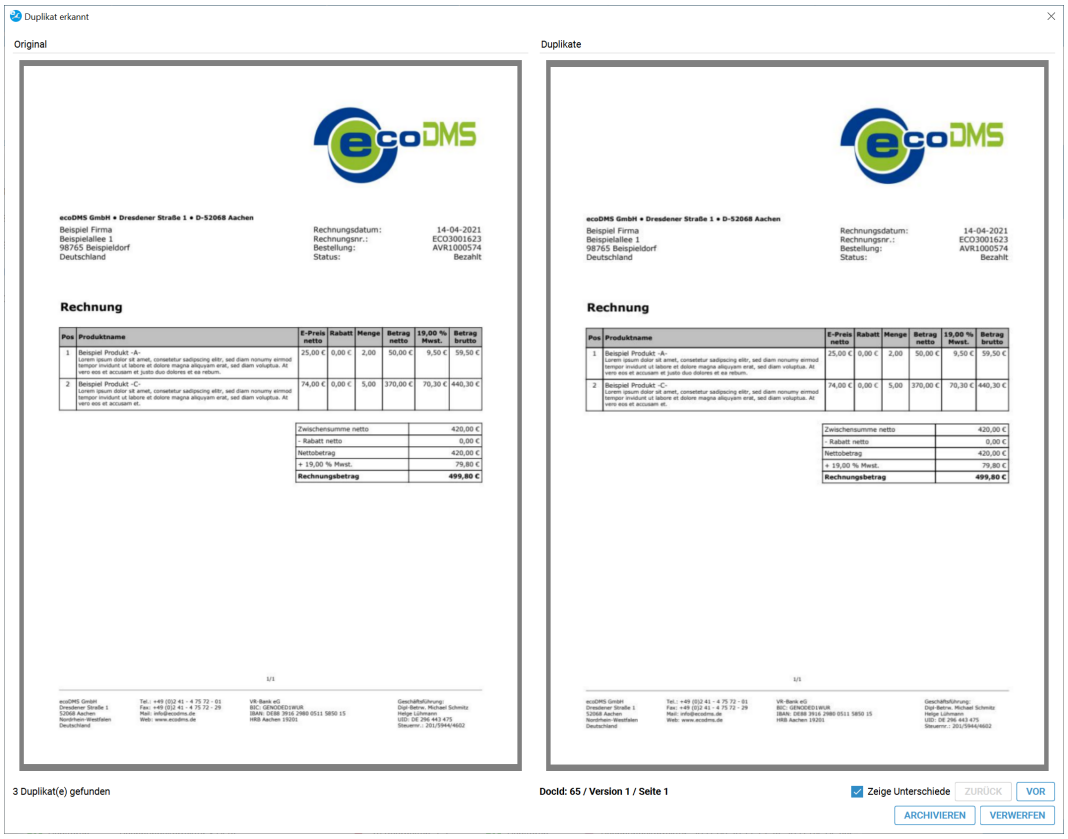


Figure 7.9: Duplicate detection (example)

7.2.5 Classification Detection

With the "classification detection" in ecoDMS, the classification attributes of a document are automatically pre-assigned by comparing them with similar, already archived and classified documents (see 7.2.5).

1. Enable classification recognition via the "Activated" checkbox

2. The "Sensitivity" slider is used to define the necessary match of classification proposals. A higher sensitivity means that more matches of existing classifications are required for a classification proposal.
   a) **Low:** For a classification proposal, there may be minor deviations to already archived and classified documents.
   b) **High:** For a classification proposal, the documents must match documents that have already been archived and classified.
3. Save the process with "OK" or "Apply".

7.2.5.1 Date Detection

- If classification detection is activated, the system also searches for a suitable date in the document.
- For example, if an invoice date is found in the document for invoices, this is automatically set in the "Date" classification attribute.
- This is independent of the sensitivity settings and also independent of any other similar documents found.

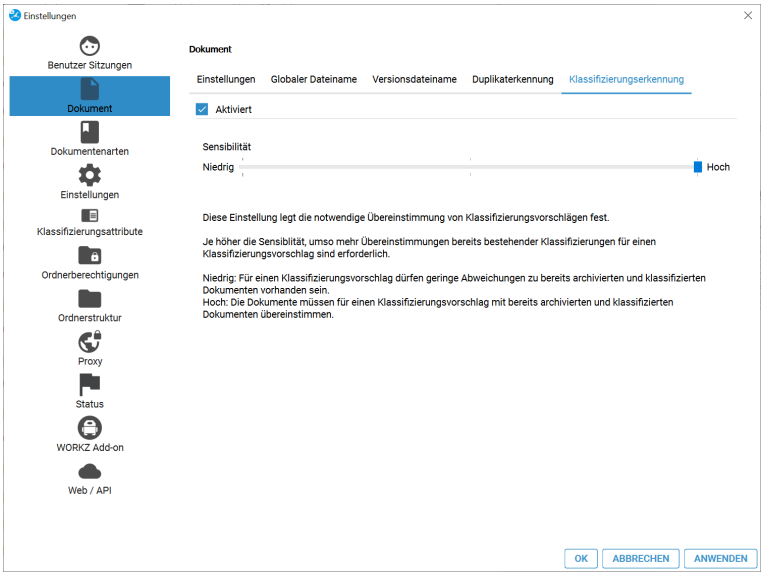


Figure 7.10: Settings: Document - Classification Detection

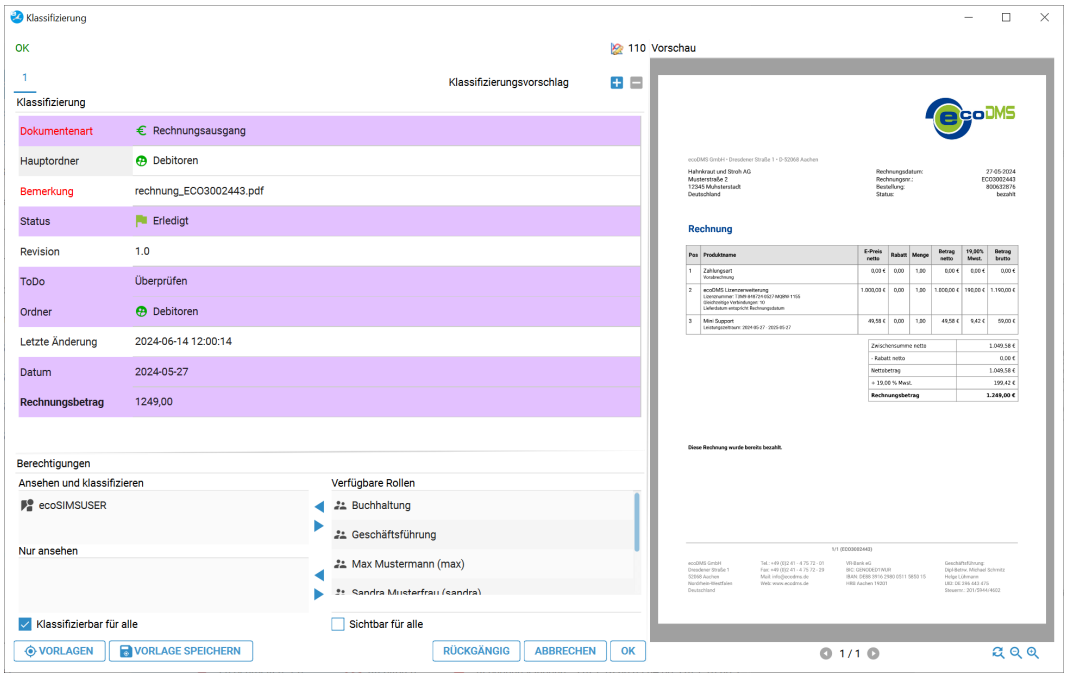


Figure 7.11: Classification Detection (Example)

7.3 Document Types & Retention Periods

The document type is a central component of classification in ecoDMS. It describes the specific type of a document (e.g., Incoming Invoice, Outgoing Invoice, Quotation, Contract).

1. **Change compared to traditional folder structures:**
   a) In a traditional file system, deep subfolder structures such as Customers -> SampleComp -> Invoices are often created for customers or suppliers. In ecoDMS, this nesting is no longer necessary:
      i. Folders: Serve exclusively as a high-level folder structure (e.g., Customers or Suppliers folders).
      ii. Document Types: Replace previous subfolders. Subcategorization takes place during archiving via the Document Type attribute.
   b) Note: Do not create categories such as Invoices or Contracts as subfolders in the folder structure, but always as a document type.
2. **Advantages and recommendation:**
   a) It is recommended to assign a suitable document type to every archived document during classification. This simplifies management and enables precise filtering by specific document types during research.

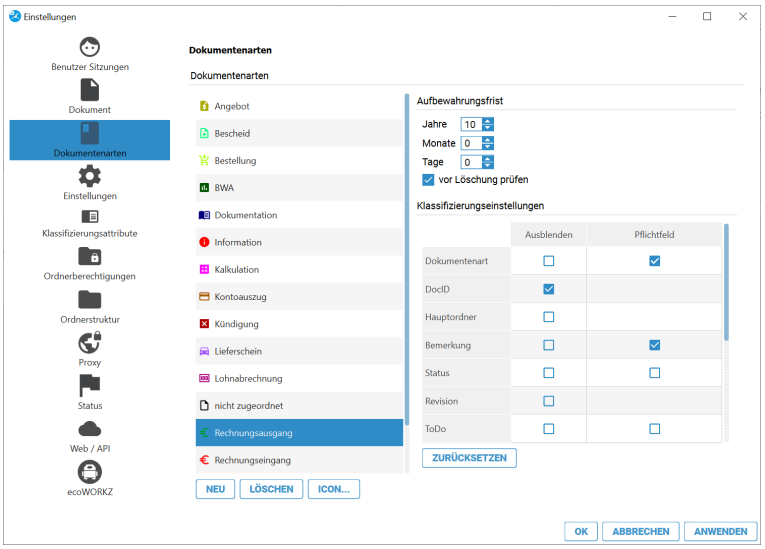


Figure 7.12: Settings - Document Types

7.3.1 Examples of Typical Document Types

```
Inquiry | Quotation | Cover Letter | Order | Notice | Certificate | Purchase Order | BWA |
    Documentation | Photo | Payslip | Expert Opinion | Information | Calculation | Bank
    Statement | Termination | Delivery Note | Reminder | Policy | Incoming Invoice | Outgoing
    Invoice | Contract | Certificate | Reference / Report Card
```

7.3.2 Practical Example: Interaction of Classification and Full-Text Search

In practice, the combination of folder, document type, and attributes replaces manual filing in nested subfolders. For example, if you are looking for all invoices from 2026 whose invoice number starts with RN26 and that are in the To Edit status, enter the following line directly into the search field:

```
RN26* AND 2026 AND "To Edit"
```

Functionality in the Background

- OCR full text: The wildcard term RN26* captures the invoice number base recognized in the body text (e.g., RN26089).
- Classification & attributes: ecoDMS automatically includes assigned features such as the status ("To Edit") and the year (2026) in the full-text index.
- Boolean operator: The AND links all three conditions exactly with one another.
- Result: The system delivers the desired document without requiring a deep navigation process through subfolders.

7.3.3 Create New Document Type

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

1. Select the tab "Document Types" in the settings dialog.
2. Click the "New" button
3. Click in to the field "New Document Type".
4. Overwrite the entry with your custom name.
5. Repeat this process to create more "document types".
6. Click "Apply" to save the process in the settings dialog.
7. Per default, ecoDMS creates document types without a retention period but with a confirmation prompt. This means that documents can be removed from the archive if required, but for security reasons this process is subject to prior verification.
   a) If you do not want to verify the matching documents with this document type prior to deleting them, you can disable the checkbox.

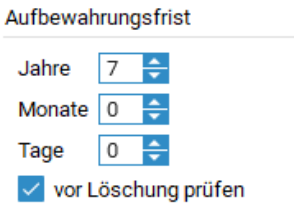


Figure 7.13: Settings- Document Types - Retention Period (Check before Erasure)

7.3.4 Retention Period

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

- Please note that the retention periods entered here for document types are automatically applied to other documents with the same classification.
- Although you can move documents to the Trash during the retention period, you cannot delete the documents from the system.
- If a document is reclassified as a different document type, the new retention period applies; however, you can always view the original retention period in the document history.

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

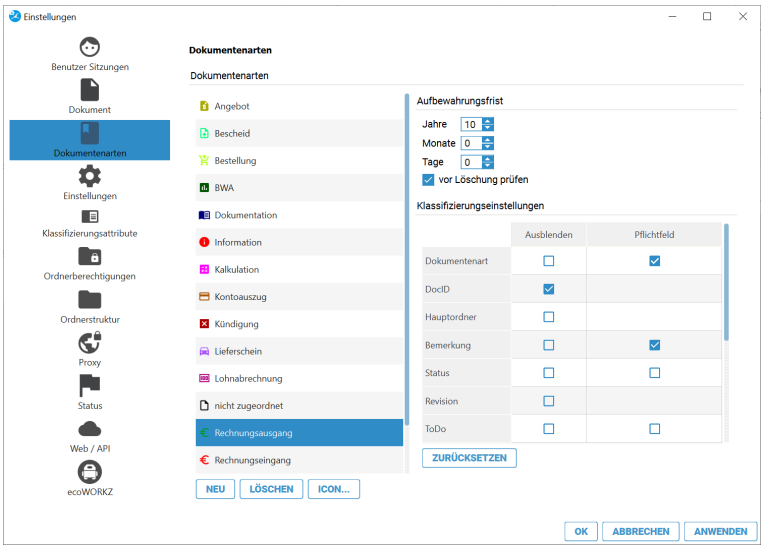


Figure 7.14: Settings - Document Types Incl. Retention Period

7.3.4.1 Create a Retention Period

To create a retention period:

1. Select the document type in "Settings - Document Types".
2. Enter the retention time in the "Retention period" area. Here you have the following fields:
   a) Years
   b) Months
   c) Days
3. The default setting in ecoDMS for each new document type is "Check before deletion." This means that documents can be removed from the archive if required, but for security reasons this process is subject to prior verification in the Trash.
   a) If you do not want to verify the matching documents with this document type prior to deleting them, you can disable the checkbox.
4. After saving, the retention period is automatically saved for all documents with this "Document Type".
5. Click "Apply" to save the process in the settings dialog.

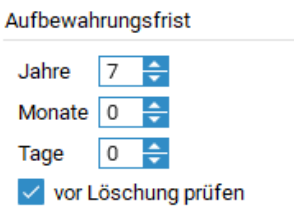


Figure 7.15: Settings- Document Types - Retention Period (Check before Erasure)

7.3.5 Classification Settings

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

1. Hide non-required classification attributes.
2. Specify required fields for classification.
    a) You cannot select default attributes (e.g. DocID, revision, main folder, etc.) as required fields
3. Specify the order of attributes.

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

7.3.5.1 Set Configuration

For the configuration, complete the following steps:

1. Select the Document Type in the "Settings - Document Types" dialog.
2. In the classification settings area, make the following settings:
    a) **Hide:** For the classification, you can hide all attributes that you do not want to display by enabling the checkbox in the "Hide" column.
    b) **Required Field:** All attributes required for the Classification of the selected Document Type can be declared as required fields in the "Required Field" column by enabling the checkbox. During Classification the fields marked as required fields must be filled in. Otherwise you will not be able to save the Classification for the Document Type.
    c) **Order:** If you require a specific order of attributes for the Classification of the selected Document Type, you can specify this here:
        i. Grab the attribute with the mouse and drag it to the required position. The attributes can be moved up or down.
3. You can repeat this process for further document types.
4. Click "Apply" to save the process in the settings dialog.

7.3.6 Rename Document Type

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

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

2. Overwrite the existing name.
3. Click "Apply" to save the process in the settings dialog.

7.3.7 Delete Document Type

> The document type "not assigned" is a system document type and can therefore not be deleted.

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

1. Select the document type in "Settings - Document Types".
2. Click the "Delete" button.
3. Click "Apply" to save the process in the settings dialog.

7.3.8 Assign Icons

You can replace the default icon with a custom icon:

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

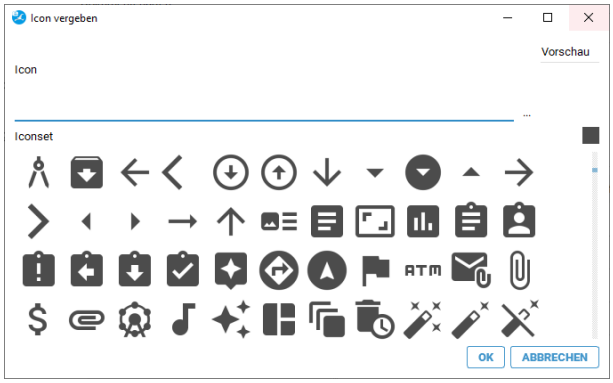


Figure 7.16: Settings - Integrated Icon Collection

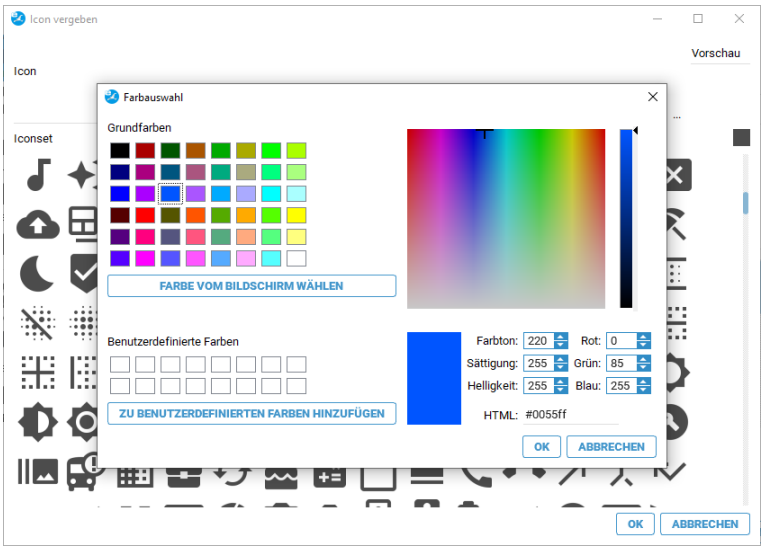


Figure 7.17: Settings - Integrated Icon Collection - Choose Color

7.4 Settings

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

7.4.1 General

In this area you can define several, general settings:

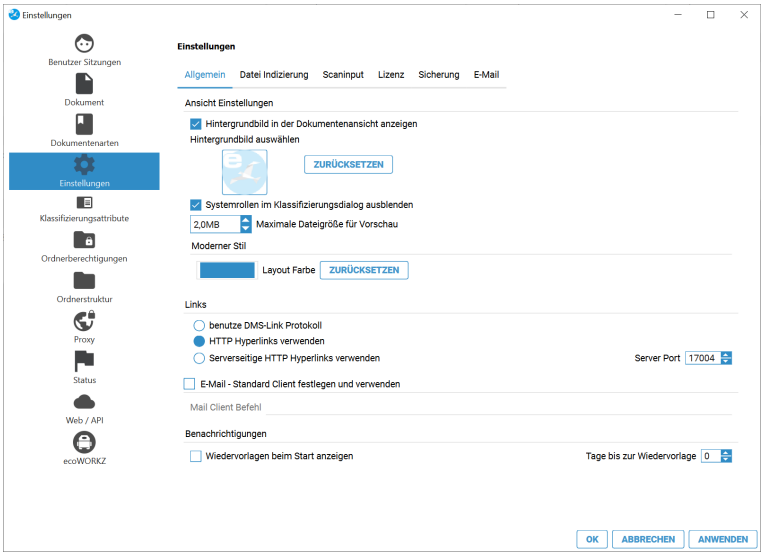


Figure 7.18: Settings - Settings - General

7.4.1.1 Display Background Image in the Document View

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

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

1. Click the thumbnail preview of the current background image to change it
2. The file manager of your operating system opens
   a) Select the file with the background image from the target folder of your operating system
   b) Permitted file formats for the background image are: *.png, *.jpg, *.jpeg, *.bmp, *.svg

7.4.1.2 Hide System Roles in Classification dialog

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

1. Select the tab "Settings - General" in the settings dialog.
2. Activate the function "Hide System Roles in Classification dialog" by setting a check mark in this row.
3. Click "Apply" to save the process in the settings dialog.

7.4.1.3 Maximum File Size for Preview

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

1. Select the "Settings - General" tab.
2. Enter the maximum file size for the preview.
3. Save the process by clicking "Apply" in the settings dialog.

7.4.1.4 Layout Color

- You can customize the Color of ecoDMS Client. For example, if you are using several ecoDMS instances, like private DMS and work DMS, you can assign a custom Color to each instance. This allows you to better distinguish the two instances from each other.

  Example:

  - Private ecoDMS: Orange
  - Business ecoDMS: Blue

- Click "Reset" in the "Modern Style" area to reset the layout Color to the original Color (ecoDMS blue).

To change the layout Color, complete the following steps:

1. In the settings dialog, select the "Settings - General" tab
2. In the "Modern Style" area, click the current layout Color
3. Select the new Color in the Color dialog
4. Confirm your selection with "OK"
5. The Color you chose is applied to ecoDMS Client
6. Save the process by clicking "Apply" in the settings dialog

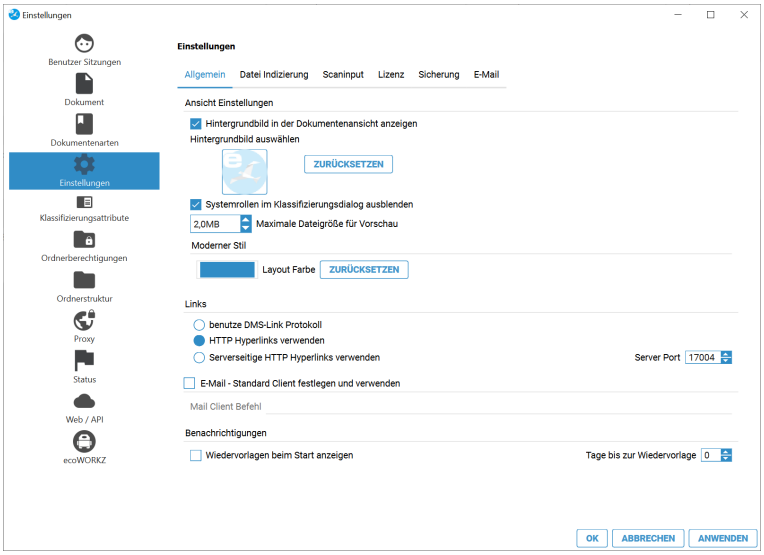


Figure 7.19: Settings - Settings - General - Layout Color (Default: Blue)

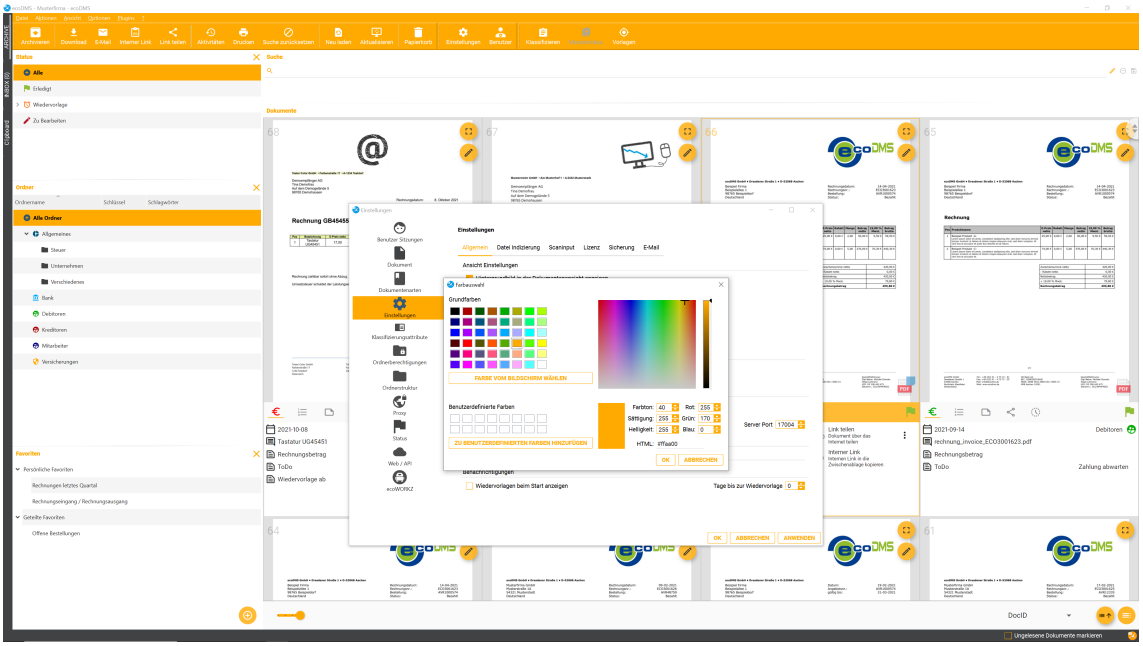


Figure 7.20: Settings - Settings - General - Layout Color (Changed, Example: Orange)

7.4.1.5 Links

- **Attention on terminal servers:** If you are running ecoDMS on a terminal server, we recommend using central (server-side) HTTP hyperlinks. "Normal HTTP hyperlinks" cannot be guaranteed for terminal servers.
- The link feature is only used for INTERNAL document calls. This requires access to the ecoDMS server!
- Use the link feature to send folder and document links to other ecoDMS users and/or copy them to the clipboard.
- To ensure the links are called properly, configure the correct ecoDMS server port in the settings.
- For more information on how to call such links, refer to the feature description in this manual: 24

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

1. Use DMS-Link protocol

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

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

2. Use HTTP Hyperlinks

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

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

3. Use Central HTTP Hyperlinks

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

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

7.4.1.6 Archiving As A Version With The ALT Key Pressed

When dragging documents (drag & drop), the ALT key determines the archiving status. Depending on the setting in your system, one of the following methods applies:

1. Default (stored this way for initial installation as of version 26.01):
   - Drag Only: The document remains editable (new versions possible).
   - ALT + Drag: The document is finalized (no further changes possible).
2. Setting After Updates:
   - Drag Only: The document is finalized (no further changes possible).
   - ALT + Drag: The document remains editable (new versions possible).

- macOS: When dragging and dropping documents, the Option key (⌥) determines the archiving status.

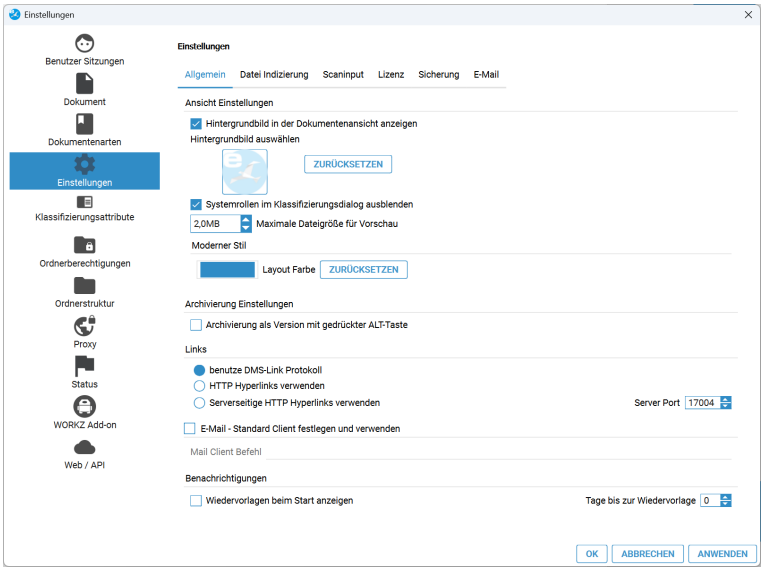


Figure 7.21: Settings - General - Archiving Settings

7.4.1.7 Email - Set and Use Default Client

ecoDMS uses your default email program to send documents. Some email clients do not support this feature. In this case, you can define a custom syntax to call any email client. This setting then applies to all users. Proceed as follows:

1. Open the settings dialog and select the tab "Settings - General".
2. Select the "Email - Set and Use Default Client" checkbox.
3. Enter the syntax in the "Mail Client Command" field.

a) Example Thunderbird:

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

b) Example Office 365:

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

4. Click "Apply" to save the settings.

7.4.1.8 Display Resubmissions at Startup

Pending resubmissions can be displayed automatically when starting ecoDMS. A window appears with the number of affected documents. The message reads: "There are X documents that reach the resubmission date." You specify how many days into the future ecoDMS checks via the number of days. Entering "5" causes the system to check the next 5 days. How to enable the feature:

1. Open the settings dialog and select the tab "Settings - General".
2. Select the "Display Resubmissions at Startup" checkbox.
3. Enter the desired number of days in the "Days Until Resubmission" field.
4. Click "Apply" to save the settings.

7.4.2 File Indexing

To refresh the display, click "Reload Display".

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

7.4.2.1 Indexing Status

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

1. **Progress:** The percentage rate for the full text recognition of all archived documents in ecoDMS.
2. **Total Documents:** The number of total archived documents in ecoDMS.
3. **Proceeded Documents:** The number of already indexed documents.
4. **Remaining Documents:** The number of documents which are indexed not yet.
5. **Failed Documents:** The number of documents which cannot be indexed because they are, for example, unreadable or defective.

7.4.2.2 OCR Options

You

- This feature only takes effect after activation. It only applies to newly archived documents. Documents that have already been archived are not re-indexed.

can activate full-text indexing as default for all new documents. ecoDMS then also re-reads documents that have already gone through other OCR software. ecoDMS then saves its own text information.

1. Select the "Discard existing OCR from documents and re-create" checkbox for this feature.

7.4.2.3 OCR Language Support

- This feature only takes effect after activation. It only applies to newly archived documents. Documents that have already been archived are not re-indexed.
- Please note that multiple languages require respective processing power, which may have an impact on performance.
- If you deselect all languages, ecoDMS automatically uses the default languages for text recognition.

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

- German (Default)
- English (Default)
- French
- Spanish
- Dutch
- Turkish
- Italian

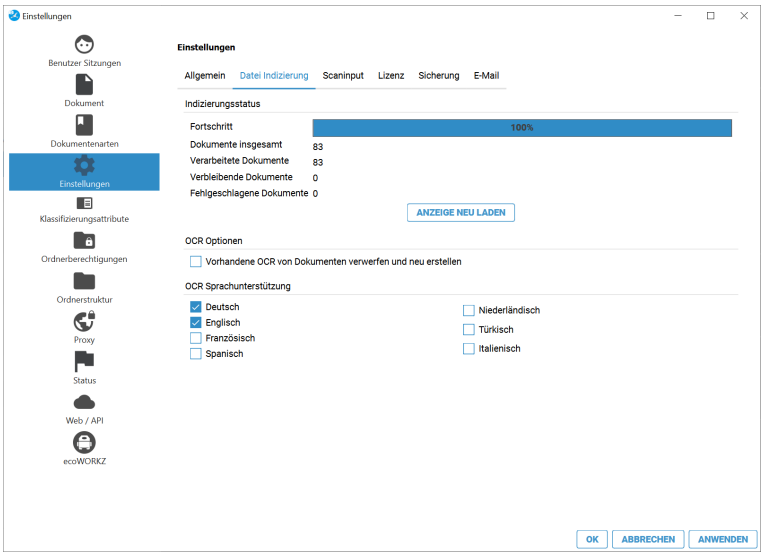


Figure 7.22: Settings - Settings - File Indexing

7.4.3 Scaninput

Refer to the separate chapter in this manual: 12.2

7.4.4 Lizenz

Refer to the separate chapter in this manual: 2

7.4.5 Backup

Refer to the separate chapter in this manual: 31

7.4.6 Email / SMTP Settings

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

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

   ```
   demoserver
   ```

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

   ```
   25
   ```

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

   ```
   STARTTLS
   SSL/TLS
   None
   ```

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

```
sampleuser
```

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

```
12345
```

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

```
sampleuser@demoserver.de
```

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

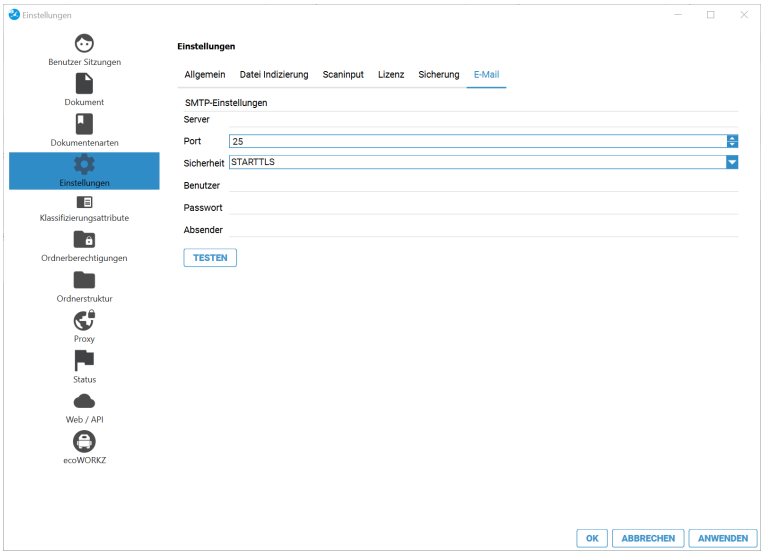


Figure 7.23: Settings - Settings - Email - SMTP Settings

7.5 Classification Attributes

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

Various types of attributes are available to create custom classification attributes. Please note the following:

- Once you have created an attribute, it cannot be deleted, but it can be renamed, edited and / or disabled.
- You cannot use the same attribute name multiple times.

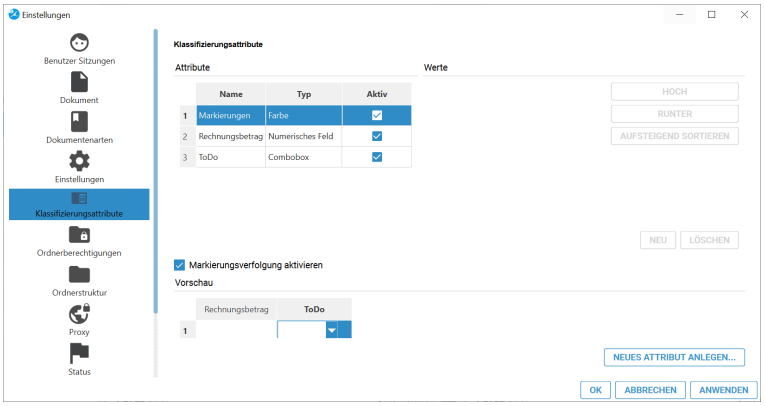


Figure 7.24: Settings - (Own) Classification Attributes

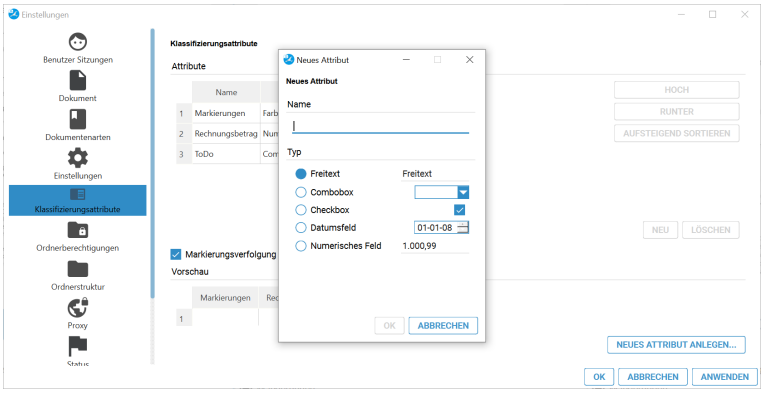


Figure 7.25: Settings - Classification Attributes - Create New Attribute

7.5.1 PDF Highlight Tracking

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

1. Select the "Classification Attributes" tab in the "Settings" dialog.
2. Select "Enable PDF highlight tracking".
3. Click "Apply" to save the setting.
4. A classification attribute displays which shows the highlight colors saved for a document.

7.5.2 Free Text

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

1. Select the tab Classification Attributes in the settings dialog.
2. Click the button "Create New Attribute".
3. A dialog opens. Enter a name for the attribute in the "Name" field.
4. Select "Free Text" in the "Type" area
5. Confirm your entry with "OK" or cancel the operation with "Cancel".
   a) The window is closed and the attribute you created is listed in a table in the "Attributes" area.
6. Click "Apply" to save the process in the settings dialog.

7.5.3 Combobox

The standard attribute ‘Status’ is an example for a Combobox.

The "Combobox" enables you to assign fixed values, which are displayed as a selection list during classification.

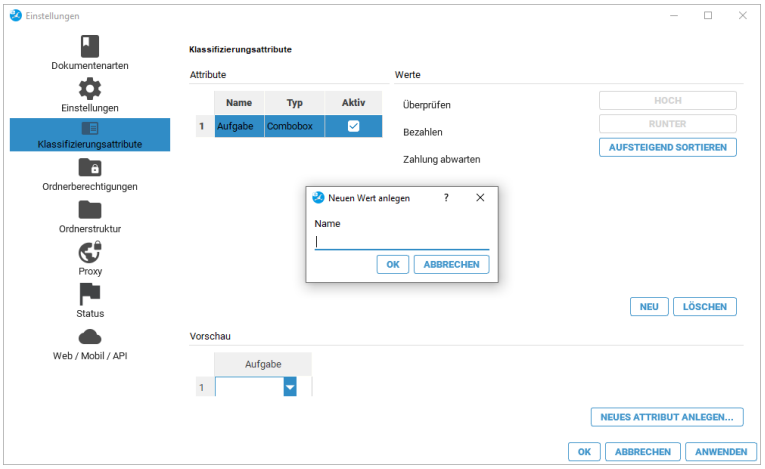


Figure 7.26: Settings - Classification Attribute - Combobox Values

1. Select the tab Classification Attributes in the settings dialog.
2. Click the button "Create New Attribute".
3. A dialog opens. Enter a name for the attribute in the "Name" field.
4. Select "Combobox" in the "Type" area
5. Confirm your entry with "OK" or cancel the operation with "Cancel".
   a) The window is closed and the attribute you created is listed in a table in the "Attributes" area.
6. Select the attribute in the "Attribute" area.

7. Now click "New" in the "Values" area.
8. A new dialog. Enter the value name here.
    a) You can create any number of values.
9. Use the buttons "Up", "Down", "Descending" and "Ascending" to move the value positions up and down and sort the values in a specified order.
10. Click "Apply" to save the process in the settings dialog.

7.5.3.1 Combobox: Sort Values

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

1. Select the tab Classification Attributes in the settings dialog.
2. Select the attribute in the "Attribute" area.
3. Now you have the following options to sort the values.
    a) Now click "Ascending" in the "Values" area to sort the values in ascending order.
    b) Now click "Descending" in the "Values" area to sort the values in descending order.
    c) Select a value and move it with the button...
        i. "Up" in order upwards
        ii. "Down" in order downwards
4. Click "Apply" to save the process in the settings dialog.

7.5.3.2 Combobox: Delete Values

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

1. Select the tab Classification Attributes in the settings dialog.
2. Select the attribute in the "Attribute" area.
3. Select the value you want to delete in the "Value" area.
4. Click "Delete".
5. Click "Apply" to save the process in the settings dialog.

7.5.4 Checkbox

The "checkbox" can be ticked during classification.

1. Select the tab Classification Attributes in the settings dialog.
2. Click the button "Create New Attribute".

3. A dialog opens. Enter a name for the attribute in the "Name" field.
4. Select "Checkbox" in the "Type" area
5. Confirm your entry with "OK" or cancel the operation with "Cancel".
    a) The window is closed and the attribute you created is listed in a table in the "Attributes" area.
6. Click "Apply" to save the process in the settings dialog.

7.5.5 Date Field

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

1. Select the tab Classification Attributes in the settings dialog.
2. Click the button "Create New Attribute".
3. A dialog opens. Enter a name for the attribute in the "Name" field.
4. Select "Date Field" in the "Type" area
5. Confirm your entry with "OK" or cancel the operation with "Cancel".
    a) The window is closed and the attribute you created is listed in a table in the "Attributes" area.
6. Click "Apply" to save the process in the settings dialog.

7.5.6 Numeric Field

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

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

To create a "Numeric Field":

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

2. Click the button "Create New Attribute".
3. A dialog opens. Enter a name for the attribute in the "Name" field.
4. Select "Numeric Field" in the "Type" area
5. Confirm your entry with "OK" or cancel the operation with "Cancel".
    a) The window is closed and the attribute you created is listed in a table in the "Attributes" area.
6. Click "Apply" to save the process in the settings dialog.

7.5.7 Activate / Deactivate Attributes

Attributes that are no longer required cannot be erased, but they can be deactivated so that they are no longer displayed during classification. However, deactivation is not possible for standard attributes. This feature is only available for user-defined classification attributes. Proceed as follows:

1. Select the "Classification Attributes" tab in the settings dialog.
2. Mark the attribute in the "Attributes" area.
    a) **Activated**: Place a checkmark in the "Activated" column to enable the attribute and thus display it for classification.
    b) **Deactivated**: Place a checkmark in the "Deactivated" column to disable the attribute and thus hide it for classification.
3. Save the process by clicking "Apply" in the settings dialog.

7.5.8 Rename Attributes

User-defined classification attributes can be renamed if required. Proceed as follows:

1. Select the "Classification Attributes" tab in the settings dialog.
2. Mark the attribute in the "Attributes" area with a double-click on the name.
3. Enter the new name for the attribute.
4. Save the process by clicking "Apply" in the settings dialog.

7.6 Folder Permissions

Using folder permissions, you centrally control access to the documents stored in the archive. Assigning rights ensures that confidential content (e.g., from HR or executive management) remains protected and users only receive access to structures relevant to them.

1. **Basic Rules and Visibility**

a) Default access (No permissions set): If a folder has no assigned permissions, it is visible and accessible to all users.

b) Restricted access: If a user or group lacks permission for a folder, this folder, including all contained documents, is completely invisible. Opening or editing is not possible.

c) Priority of folder permissions: Folder permissions take priority over document permissions. If a user does not have access to the folder, they cannot view the documents located within it – even if permission exists at the document level. However, additional, more fine-grained permissions can be granted for individual documents if required.

2. **Inheritance of Rights and Individual Adjustment**

a) Inheritance to subfolders: Permissions of a main folder automatically apply to all existing and future created subfolders.

b) Individual permissions: Inheritance can be adjusted at the subfolder level if needed. Every main and subfolder can receive differing permissions.

3. **Special Features of System Roles**

a) ecoSIMSAdmin role: Users with the administrator role ecoSIMSAdmin see the folder structure in the user interface, but have no insight into the document content contained within.

b) scanner role: If a folder receives specific permissions, access must also be granted to the scanner role. If this permission is missing, automatic Classification Templates cannot access the folder during the scan process for security reasons.

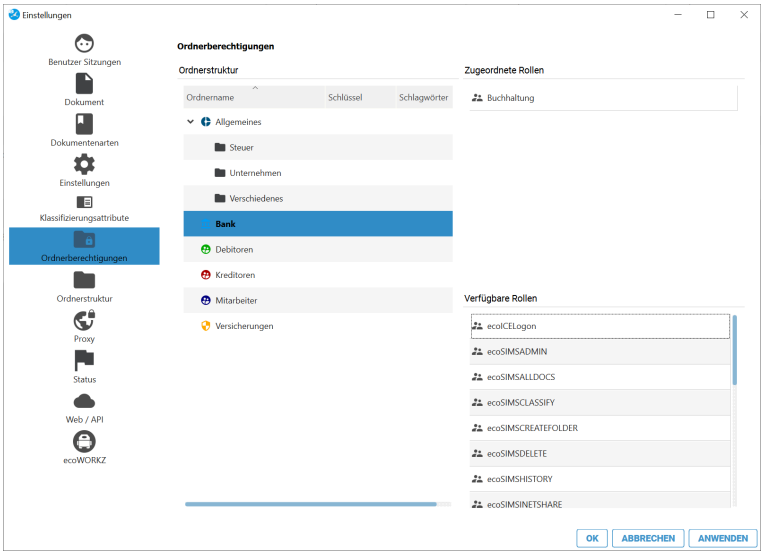


Figure 7.27: Settings - Folder Permissions

7.6.1 Assign Folder Permissions

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

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

2. Select the required folder in the Folder Structure.
3. Drag and drop the appropriate "roles" from the "Available Roles" window into the "Assigned Roles" window.
4. You can repeat this operation for other folders.
    a) Each time you change folders, the system prompts you to save your settings.
    b) Confirm the message with "Yes" or cancel the operation with "No".
5. Click "Apply" in the settings dialog to save the operation.

7.6.2 Remove Folder Permissions

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

1. Select the "Folder Permissions" tab in the settings dialog.
2. Select the required folder in the Folder Structure.
3. Drag and drop the appropriate "roles" from the "Assigned Roles" window into the "Available Roles" window.
4. You can repeat this operation for other folders.
    a) Each time you change folders, the system prompts you to save your settings.
    b) Confirm the message with "Yes" or cancel the operation with "No".
5. Click "Apply" in the settings dialog to save the operation.

7.6.3 User Example

Case 1:

1. The "Accounting" role (group) is assigned to the "Tax" folder.
2. The "Accounting" role consists of users "Peter Smith", "John Doe" and "Sandy Sample".
3. The user "Peter Smith" archives a document with the following classification:
    a) Folder: Tax
    b) Document type: Incoming invoices
    c) Status: ToDo
    d) Permissions: For classify by all users

Explanation for case 1:

1. As the folder has a permission for the "Accounting" role (group), the archived document is now visible and for classification by all 3 members of the role.
2. Other users, which are not part of the role (group) "Accounting", can neither see the folder nor the document.

Case 2:

1. The "Accounting" role (group) is assigned to the "Tax" folder.
2. The "Accounting" role consists of users "Peter Smith", "John Doe" and "Sandy Sample".
3. The user "Peter Smith" archives a document with the following classification:
   a) Folder: Tax
   b) Document type: Incoming invoices
   c) Status: ToDo
   d) Permissions: For classify for "Peter Smith"

Explanation for case 2:

1. As the folder has a permission for the "Accounting" role (group) and "Peter Smith" is part of this role, he may view and classify the document.
2. The user "John Doe" and "Sandy Sample" may also access the folder, but cannot see the document archived by "Peter Smith", as only he received a permission for the document in the classification.
3. Other users, which are not part of the "Accounting" role (group), can neither view the folder nor the document.

7.7 Folder Structure

- The folder structure in ecoDMS serves as a broad orientation framework. To keep administrative effort low, the folder hierarchy is kept as flat and minimalist as possible.

Principle of Flat Storage:

- No nested subfolders: Detailed folder trees (e.g., Customers -> Company X -> 2026 -> Invoices) are completely eliminated.
- Restriction to main categories: Only create a few general folders for central company areas (e.g., Customers, Suppliers, HR).
- Outsourcing fine structure: Precise sorting, assignment, and subsequent research are handled via classification (document types and other attributes) and full-text search, rather than folder paths.
- Access control: Folders additionally serve as a bracket for permissions. Rights are assigned at the top folder level and inherited downwards. Folders without read permissions remain invisible to the respective users.

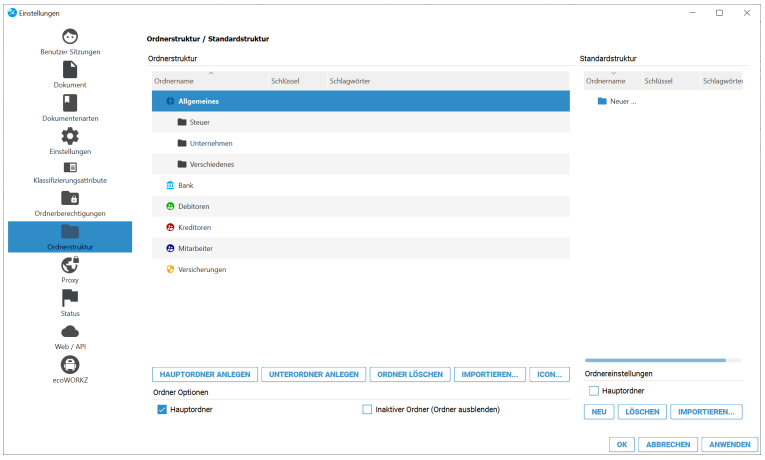


Figure 7.28: Settings - Folder Structure

7.7.1 Creating Main Folders

Notes:

- Main folders are automatically displayed in the classification.
- Folders cannot be moved later.

Main folders are the top level in your folder structure. Here's how to create one:

1. Open the settings dialog -> go to the Folder Structure tab.
2. Click on Create Main Folder.
3. In the new dialog::
   a) **Name:** Enter a suitable folder name.
   b) **Key:** (OPTIONAL ALPHANUMERIC FIELD) e.g., customer number or project number.
   c) **Tags:** OPTIONAL for better searchability (Info: 7.7.4)
   d) **Jump to new folder:** Check this box if you want to start working with this folder right away.
4. Click OK.
5. Finally, click Apply.

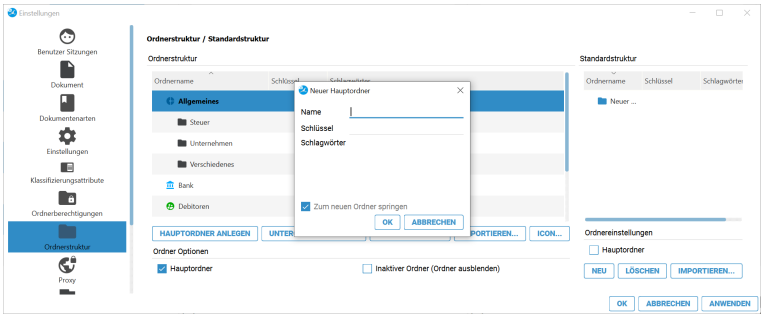


Figure 7.29: Settings - Folder Structure - Create New Main Folder

7.7.2 Convert Existing Folder to Main Folder

Note:

- Documents that are already assigned will remain unchanged for revision purposes.

You can convert an existing folder into a main folder:

1. Open the settings dialog -> go to the Folder Structure tab.
2. Open the Folder Structure tab.
3. Select the folder.
4. Enable the Main Folder option.
5. Save by clicking Apply.

7.7.3 Creating Subfolders

Subfolders can be selected as storage targets in the classification within the folder structure. The associated main folder is automatically recognized by the system. Creating folders is also possible directly through the classification dialog or the folder structure, provided the appropriate permissions are granted. Folders that have been created cannot be moved within the folder structure.

1. Open the settings dialog -> go to the Folder Structure tab.
2. Select the desired main folder.
3. Click on Create Subfolder.
4. In the new dialog::
   a) **Name:** Enter a suitable folder name.
   b) **Key:** (OPTIONAL ALPHANUMERIC FIELD) e.g., customer number or project number.
   c) **Tags:** OPTIONAL for better searchability (Info: 7.7.4)

d) **Jump to new folder:** Check this box if you want to start working with this folder right away.

5. Click OK.
6. Finally, click Apply.

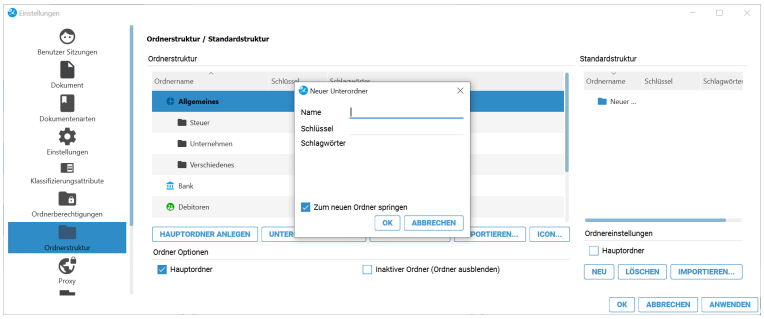


Figure 7.30: Settings - Folder Structure - Create New Subfolder

7.7.4 Using and Capturing Tags

Tags help with searching and automatically categorizing documents.

- **Automatic Categorization:** ecoDMS recognizes the tags in the document text and sorts it into the correct folder when all tags appear exactly as specified.
- **Manual Categorization:** When searching, you can also search by tags, e.g., by location, name, project number, etc.
- **Examples:** Customer number, address details, project information, VAT number...

1. Open the settings dialog -> go to the Folder Structure tab.
2. Double-click on the Tags field of the desired folder.
3. Enter (new) tags.
4. Finally, click Apply.

7.7.4.1 Automatic Categorization of the Folder (Tags)

When a document is archived via the PDF/A printer, scanning, or an Office plugin, and no template is recognized, ecoDMS can still automatically assign the document to the correct folder - provided the tag recognition feature is enabled. The automatic categorization occurs under the following conditions:

1. The document contains all the previously captured tags.
2. ecoDMS correctly recognizes these terms in the document.
3. The automatic folder recognition is enabled in the ecoDMS settings.

Important Notes for Using Tags:

- Use unique terms, such as a VAT ID or a customer number.
- Enter tags without separators like commas or hyphens.
- All tags are linked with "AND," meaning they must appear completely and exactly in the same spelling in the document.
- Enable the Automatic Folder Recognition feature to allow recognition by tags. For more details, see the section [sec:Folder Recognition Enable/Disable].
- If you do not want automatic categorization based on tags, this feature must be disabled in the settings. In this case, the automatic template recognition should also be turned off (though this is not recommended).

7.7.4.2 Manual Categorization of the Folder (Tags)

- When manually searching for a folder - whether within the folder structure in the ecoDMS client or during the classification of a document - tags can be used as search criteria.
- The user does not need to know the exact folder name.
- Instead, they can specifically search for the correct folder based on address data, customer numbers, or other unique terms that have been saved as tags.
- This method allows for a quick and precise folder selection - even without knowing the exact folder name.

7.7.5 Rename Folder

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

1. Select the tab Folder Structure in the settings dialog.
2. Select the folder you want to rename in the Folder Structure by double-clicking in the "Folder" column.
3. Enter the new name.
4. Click "Apply" to save the process in the settings dialog.

7.7.6 Delete Folder

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

1. Select the tab Folder Structure in the settings dialog.
2. Select the folder you want to delete in the Folder Structure.
3. Click "Delete Folder".
4. Click "Apply" to save the process in the settings dialog.

7.7.7 Change Key

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

1. Select the tab Folder Structure in the settings dialog.
2. Select the key you want to change in the Folder Structure by double-clicking in the "Key" column.
3. Enter the new key.
4. Click "Apply" to save the process in the settings dialog.

7.7.8 Import a Folder Structure

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

1. Select the tab Folder Structure in the settings dialog.
2. Click the "Import" button in the Folder Structure.
3. Select the XML file and open it.
4. Click "Apply" to save the process in the settings dialog.

7.7.8.1 Valid XML Items

1. name (folder name)
2. key (e.g. a customer number)
3. buzzwords (keywords)

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

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

7.7.8.2 XML Sample

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

```
                    <folder name="Subfolder 03a"></folder>
                </folder>
            </ecoDMSFolders>
```

7.7.9 Assign Icons

You can replace the default icon with a custom icon:

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

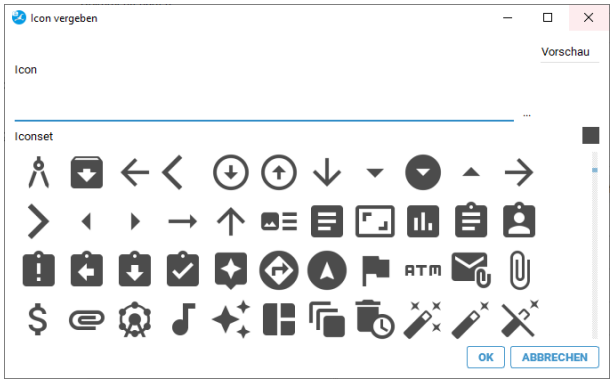


Figure 7.31: Settings - Integrated Icon Collection

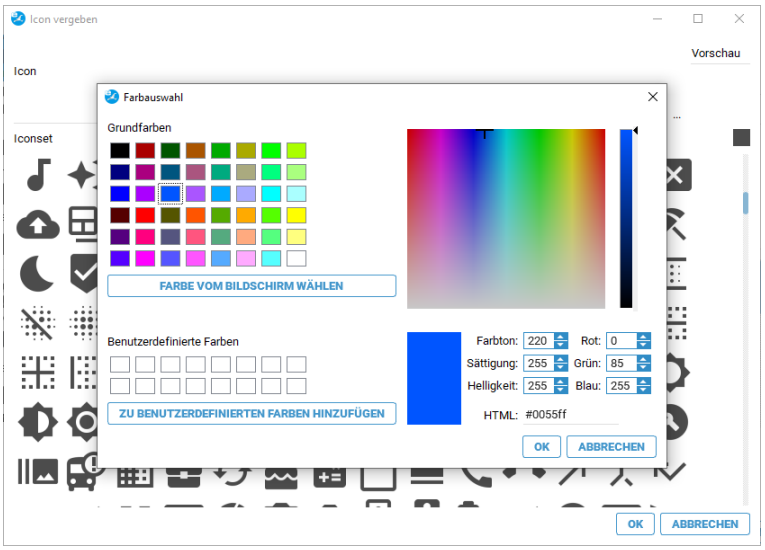


Figure 7.32: Settings - Integrated Icon Collection - Choose Color

7.7.10 Inactive Folder (Hide Folder)

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

1. Select the tab Folder Structure in the settings dialog.
2. Select the folder in the Folder Structure.
3. Enable "Inactive Folder (Hide Folder)" in the "Folder Options".
4. Click "Apply" to save the process in the settings dialog.

7.7.11 Default Structure

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

1. You want to create a Customers main folder in ecoDMS. All customers should be listed below this folder.
2. For each customer you simultaneously want to create a fixed substructure. The substructure is the same for each customer.
3. To save you from creating such a substructure for each customer from scratch, the structure can be defined in a default structure.

7.7.11.1 Create a New Folder in the Default Structure

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

1. Select the tab Folder Structure in the settings dialog.
2. In the Folder Structure, select the folder / main folder below which you want to create the "default structure".
3. Click "New" in the "Default Structure".
   a) A folder is automatically created.
   b) Create a default structure with any number of folders
   c) If you want to declare a folder as a "main folder" in the default structure, check the "Main Folder" checkbox.
   d) The structure can contain any number of main folders and subfolders.
4. Click "Apply" to save the settings
5. Now create your new structure for the folder you selected in the folder structure
   a) The new folders automatically contain the default structure you created
6. Click "Apply" to save the process in the settings dialog.

7.7.11.2 Import a Default Structure

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

1. Select the tab Folder Structure in the settings dialog.
2. Click the "Import" button in the "Default Folder Structure".
3. Select the XML file and open it.
4. Click "Apply" to save the process in the settings dialog.

7.7.11.2.1 Valid XML Items

1. name (folder name)
2. key (e.g. a customer number)
3. buzzwords (keywords)

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

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

7.7.11.2.2 XML Sample

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

```
            </folder>
            <folder name="Folder 02">
                  <folder name="Subfolder 01a"></folder>
                  <folder name="Subfolder 02a"></folder>
                  <folder name="Subfolder 03a"></folder>
            </folder>
      </ecoDMSFolders>
```

7.7.11.3 Delete Folder from Default Structure

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

1. Select the tab Folder Structure in the settings dialog.
2. Select the folder in the "Default structure".
3. Click "Delete".
4. Click "Apply" to save the process in the settings dialog.

7.7.12 Folder Structure: Additional Functions in ecoDMS

There are various functions and commands for the folders created in ecoDMS.

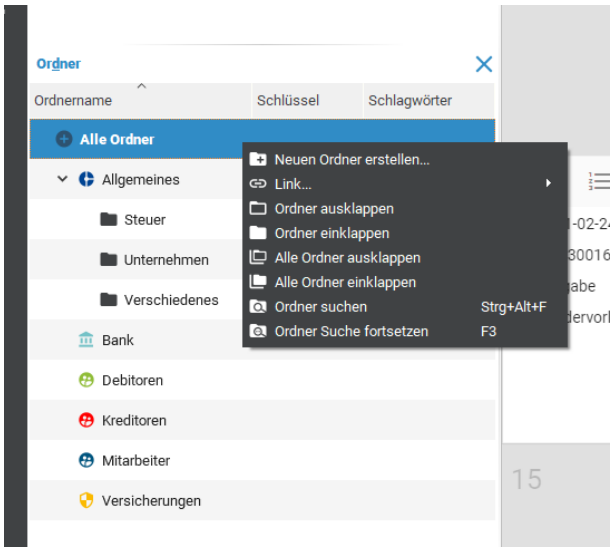


Figure 7.33: Folder Structure - Functions when right-clicking on a Folder

7.7.12.1 Create New Folder

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

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

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

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

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

3. A dialog opens. Enter the following information:

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

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

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

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

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

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

7.7.12.2 Skip to Folder

1. Select the document in the ecoDMS table.

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

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

7.7.12.3 Expand / Collapse Folders

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

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

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

2. Click "Expand Folder".

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

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

2. Click "Collapse Folder".

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

1. Right-click on a folder in the folder structure.
2. Click "Expand All Folders".

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

1. Right-click on a folder in the folder structure.
2. Click "Collapse All Folders".

7.7.12.4 Order of the Folder Structure

You can change the order of the folders:

1. In the folder structure, click the column ribbon of the column you want to sort
    a) The arrow displays the sort direction (ascending or descending)

7.7.12.5 Hide Column(s)

The folder structure contains various columns:

1. Folders
2. Key
3. Keywords

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

1. Right-click the ribbon line in the "Folder" window (column names).
2. Select "Show/Hide Column(s)".
3. Disable the columns by removing the checkmark (tick).

7.7.12.6 Show Column(s)

The folder structure contains various columns:

1. Folders
2. Key
3. Keywords

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

1. Right-click the ribbon line in the "Folder" window (column names).
2. Select "Show/Hide Column(s)".
3. Enable the required columns by setting the mark (tick).

7.8 Proxy

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

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

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

1. Select the Proxy tab in the settings dialog.
2. Enable the "Use Proxy" checkbox.
3. Enter the following information in the "Proxy Settings":
   a) **Proxy:** Enter the IP address or the DNS name of the Proxy.
   b) **Port:** Here you enter the associated Port number.
4. As an option, you can enter the login information to authenticate the Proxy.
   a) **User Name:** Enter the user name.
   b) **Password:** Enter the matching password here.

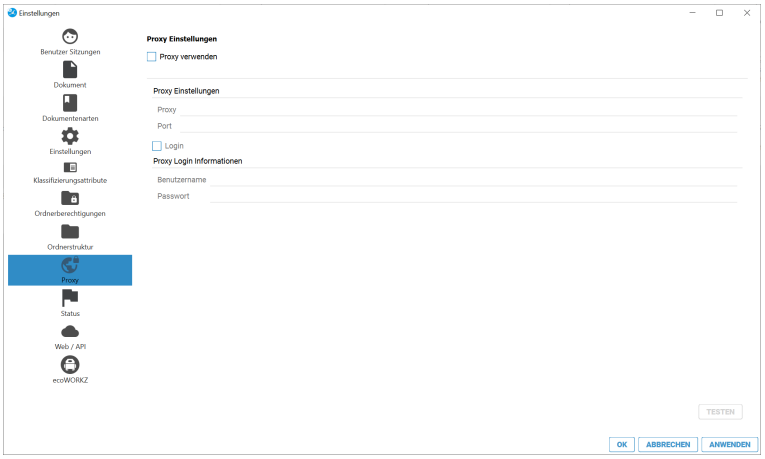


Figure 7.34: Settings - Proxy (Function is currently disabled)

7.9 Status

A status provides information about the processing status of a document. Moreover, you can execute a manual ad-hoc workflow using the status. If, for example, the status "To Do" is assigned to a document, which is then handed over to

a user group / person, the employee responsible will recognise from the status that the document needs processing. Once the document has been processed, the status can be changed to "Done", for example. There are three types of document status. These cannot be deleted but they can be renamed. You can find more information on statuses in the chapter on "Classifications".

1. Done
2. Resubmission
    a) The "Resubmission" status has substatuses in the front end. These are fixed integrated filters. This is why they are not displayed in the settings dialog.
        i. Expired
        ii. Next 7 days
3. To Do

Tip:

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

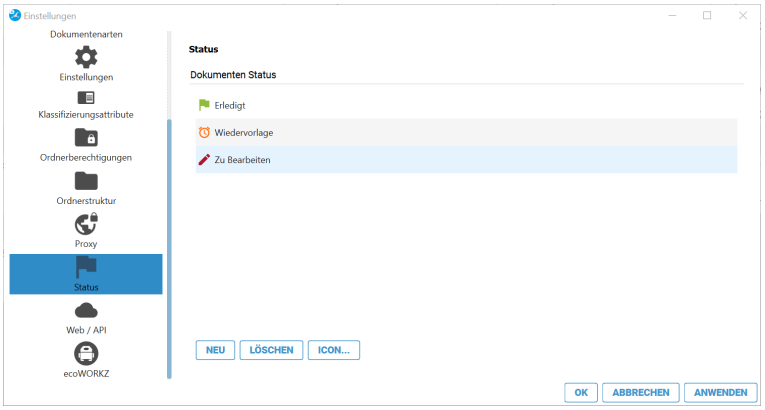


Figure 7.35: Settings - Statuses

7.9.1 Create New Status

To create a new Status, complete the following steps:

1. Select the tab Status in the settings dialog.
2. Click the "New" button

3. Click in to the field "New Status".
4. Overwrite the entry with your custom name.
5. Repeat this process to create more "document types".
6. Click "Apply" to save the process in the settings dialog.

7.9.2 Rename Status

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

1. Select the tab Status in the settings dialog.
2. Select the Status.
3. Overwrite the entry with your custom name.
4. Repeat this process to create more "document types".
5. Click "Apply" to save the process in the settings dialog.

7.9.3 Delete Status

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

1. Select the tab Status in the settings dialog.
2. Click the "Delete" button
3. Repeat this process to delete more statuses.
4. Click "Apply" to save the process in the settings dialog.

7.9.4 Assign Icons

You can replace the default icon with a custom icon:

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

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

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

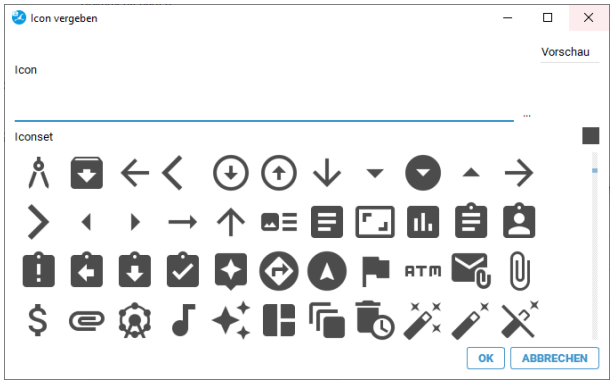


Figure 7.36: Settings - Integrated Icon Collection

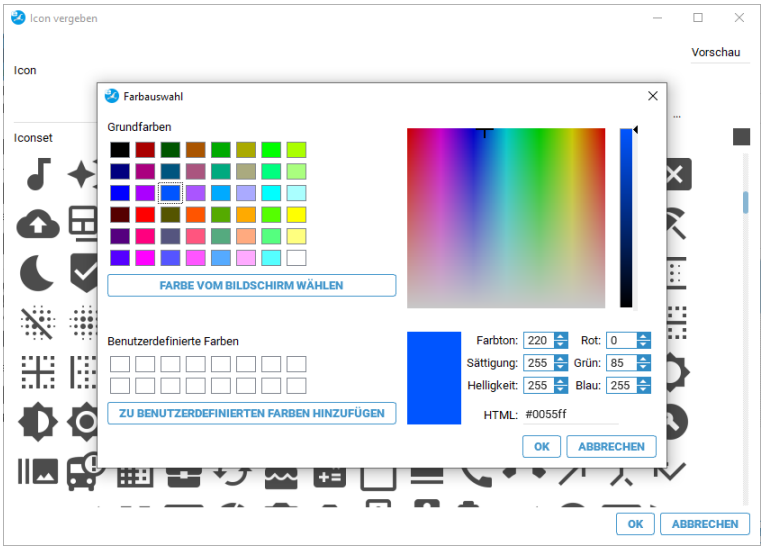


Figure 7.37: Settings - Integrated Icon Collection - Choose Color

7.10 Web / API

In this area, you manage and activate the interfaces for external access to ecoDMS (desktop app, web client, ScanApp and REST API).

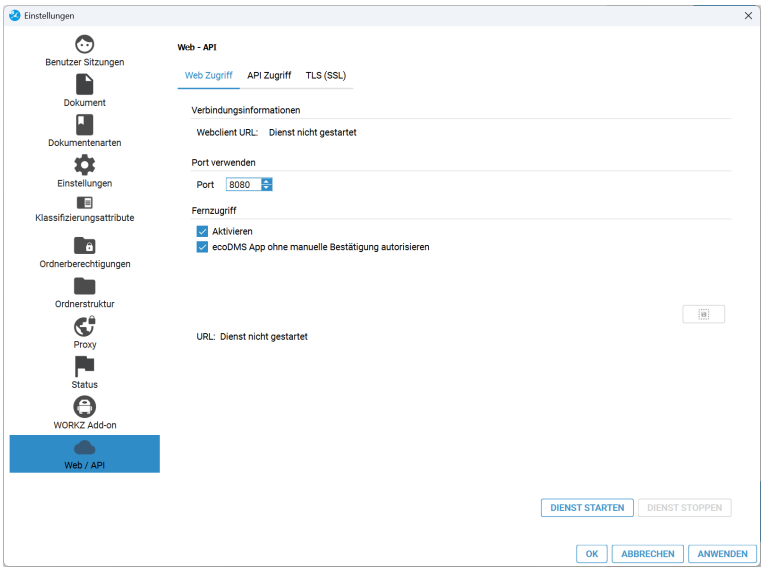


Figure 7.38: Settings - Web Access (Not Started)

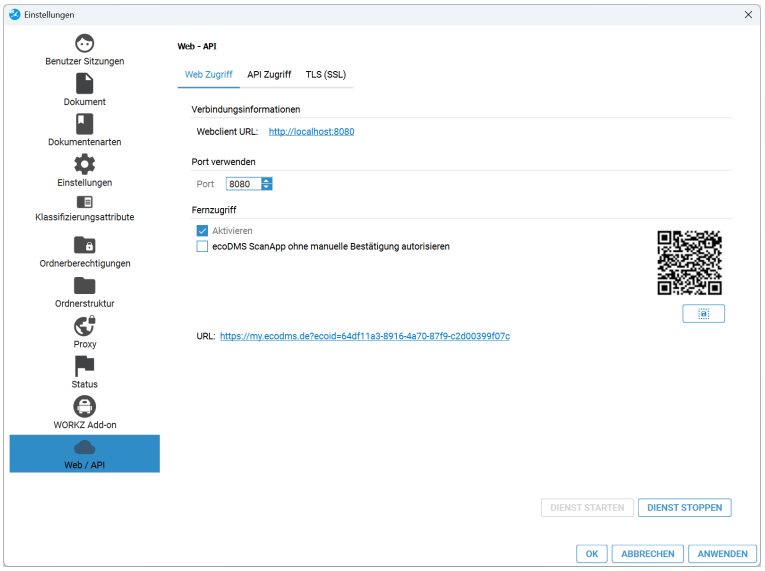


Figure 7.39: Settings - Web Access (Activated)

7.10.1 Web Access (Web Client / Remote Access / ecoDMS ScanApp)

In order for ecoDMS to be accessible via the browser or the ScanApp, the web service must be active.

- **Web Access:** Allows the use of the web client within your own local network (LAN/WLAN).
- **Remote Access (Optional):** Must be additionally activated to use ecoDMS outside your own network.
  - **Application Examples for Remote Access:**
    * Mobile access via smartphone, tablet, or laptop (cellular network).
    * Use of the ecoDMS ScanApp while on the go.
    * Access from external networks (e.g., while traveling, in the home office...).

7.10.1.1 Start Web Service

To use or configure web access, the corresponding services must be managed in the ecoDMS client.

1. **Open Settings:** Log in as an administrator and navigate to Settings -> Web / API - Web Access.
2. **Use Port:** By default, port 8080 is set (optionally changeable).
3. **Remote Access:**

   - Note on Activation: If remote access is grayed out, the web service must first be stopped in order to make the change.

   a) **Activate:** Check this box if access from outside the network should be allowed.

   b) **Authorize ecoDMS ScanApp Without Manual Confirmation:** This feature controls how new mobile devices are added to the system.

      i. **Activated:** Mobile devices connect to the archive immediately after scanning the activation barcode. Manual approval by the administrator is not required; the device is directly marked as "Active" in the user sessions (see 7.1.2).

      ii. **Deactivated (Default):** For security reasons, every new device must be manually approved by an administrator.

         A. ***Manual Activation (if automatic authorization is off):*** *Navigate to the user sessions - Connected Mobile Devices. Find the new device in the list. Toggle the switch in the "Actions" column to Active.*

   c) ***Url:*** *Here, ecoDMS shows the link to access the web client from outside (remote access).*

   d) ***Barcode:*** *The barcode contains the link to access the web client from outside (remote access).*

4. **Activate Service:** Click "Start Service" to start web access with the selected settings. This process may take some time.
5. **Web Client URL:** Here, ecoDMS shows the link to access the web client within your own network (internal).
6. Click "Apply" to save the process or cancel it with "Cancel."

7.10.1.2 Stop Web Service

To stop the web service, proceed as follows:

1. Navigate to Web / API - Web Access.
2. Click Stop Service.
3. Once the service is stopped, the web client URL will be displayed as "not available."
4. Confirm by clicking Apply.

7.10.2 API Access

- The ecoDMS API is not required for the general operation of the document management system.
- Each ecoDMS full version license (Private / Business Edition) includes a number of free API connects for testing purposes.
- To purchase the unlimited API, you need to purchase ecoDMS ONE. ecoDMS ONE is the full package for business customers and comprises our software solution ecoDMS, incl. WORKZ add-on and API, as well as ecoMAILZ.

The ecoDMS API is intended for developers. The ecoDMS API allows you to call functions from the ecoDMS document management system using the API REST service. For example, ecoDMS can be connected to third-party systems via programming (e.g. CRM software, ERP systems, etc.). The core functions of ecoDMS Server, such as "archive", "classify", or "download", can be accessed via the API. The individual functions are accessed via the REST web services. This provides each function with a unique address which is expressed as a URL and which can be used, among others, in internet browsers.

- The Swagger documentation (s. 7.10.2.3) describes the commands available for programming.
- The activation of the API service is managed via this menu item in the ecoDMS settings dialog box.

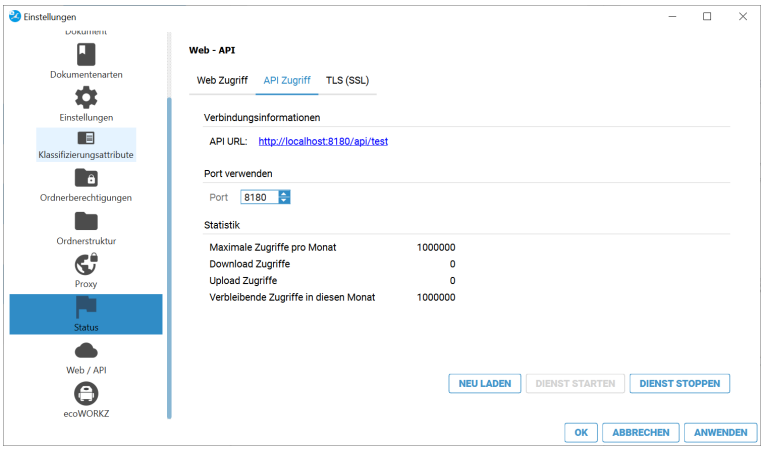


Figure 7.40: Settings: API Access (API REST Service)

7.10.2.1 Activation

To use the ecoDMS API, you must enable the service in the Settings of ecoDMS Client.

7.10.2.1.1 Start API Service

How to activate API service:

1. Open the Settings in ecoDMS Client as administrator
2. Click the tab "WEB / API" -> API Access
3. **Use Port:** The default setting for the port is "8180". Modify the port if necessary.

4. **API key::** When using multi-factor authentication (MFA) (see 5.8 + 6.2.2), the appropriate API key can be enabled, generated and copied here.
5. **Start Service:** Click "Start Service" to initiate API access with your settings. This process may take a while.
6. **API URL:** This is where ecoDMS displays the link to call the ecoDMS API in your network (internal).
7. Click "Apply" to save or "Cancel" to abort the process.

7.10.2.1.2 Stop API Service

How to stop API service:

1. Open the Settings in ecoDMS Client as administrator
2. Click the tab "WEB / API" -> API Access
3. **Dienst stoppen:** Click "Stop Service" to disable the API access. This process may take a while.
4. **API URL:** If the API service is inactive, no URL is displayed.
5. Click "Apply" to save or "Cancel" to abort the process.

7.10.2.2 Statistik

API connects are accesses to the ecoDMS API. Each time you use the API to load or save a document, an API connect is consumed. The statistics display the following values for ecoDMS API:

1. **Maximum number of accesses per month:** Available number of monthly API connects
2. **Download accesses:** Number of already downloaded or retrieved documents via the ecoDMS API in the current month
3. **Upload accesses:** Number of already archived or uploaded documents via the ecoDMS API in the current month
4. **Remaining accesses in this month:** Number of remaining API connects in the current month

7.10.2.3 Swagger Documentation

You can use the Swagger UI for access testing and for API documentation.

7.10.2.3.1 Start Swagger UI

1. Start the Swagger UI with the following command in the browser:

```
/api/startDebug
```

2. If the API key is activated in the client, startDebug must be called with the API key as an additional parameter.

```
Beispiel:
http://localhost:8180/api/startDebug?apiKey=dGhpc2lzdGhlYXBpa2V5
```

3. To start Swagger, the API service is restarted in the background.

a) This may take several seconds.

4. You are automatically redirected to the swagger-ui homepage.

For more details on how to use Swagger, go to the project website: `swagger.io`



Figure 7.41: Example for API Documentation

7.10.2.3.2 Stop Swagger UI

When you are using the API port productively or if it is available to everyone, it makes sense to stop Swagger.

1. Stop the Swagger UI with the following command:

```
<server-name>/api/stopDebug
```

2. To stop Swagger, the API service is restarted in the background.
   a) This may take several seconds.

7.10.3 TLS (SSL)

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

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

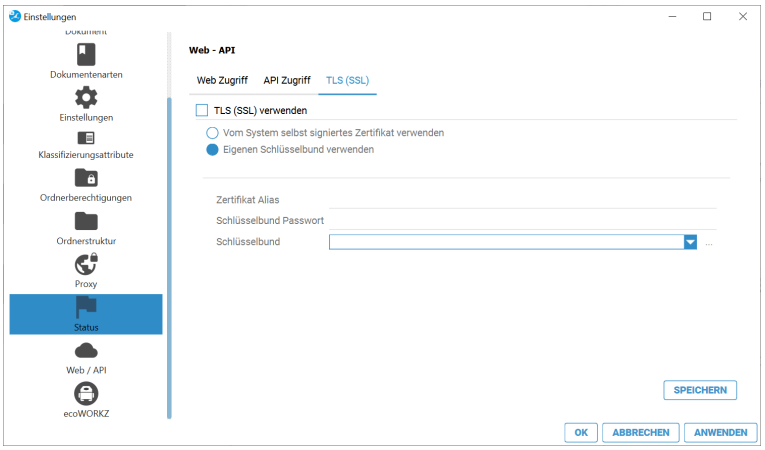


Figure 7.42: Settings: TLS (SSL)

7.10.3.1 Use a Self-Signed Certificate Generated by the System

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

1. Select the tab "Web - Mobile - API -> TLS (SSL)" in the settings dialog.
2. Enable the command "Use TLS (SSL)" with a check mark.
3. Click "Use a self-signed certificate generated by the system".
4. Click "Apply" to save the process in the settings dialog.

7.10.3.2 Use My Keystore

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

1. Select the tab "Web - Mobile - API -> TLS (SSL)" in the settings dialog.
2. Enable the command "Use TLS (SSL)" with a check mark.
3. Click "Use my keystore".
4. Enter the following information:
   a) **Certificate Alias:** Enter the name of the certificate.
   b) **Keystore Password:** Enter the keystore password.
   c) **Keystore:** The keystore for the TLS (SSL) encryption must be in the format JSSE (Java KeyStore). Here the keystore is uploaded and selected.
      i. Click the button "..." to select the keystore on your filesystem.
      ii. Confirm your selection and upload the keystore.
      iii. Select the keystore from the list.
5. Click "Apply" to save the process in the settings dialog.

8 Archiving

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

Information

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

Document origin

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

Archiving formats

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

8.1 Function: Archiving

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

1. Start the "Archive" function. To do this you have the following options:

a) **Menu**: Select "File - Archive" from the menu bar

b) **Icon**: Click the icon "archive" on the toolbar

c) **Right-click:** In the ecoDMS table: Right-click "Archive"

d) **Keyboard shortcut:** CTRL + A



Figure 8.1: Icon - Archive

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

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

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

3. To load the file(s), click "Open".

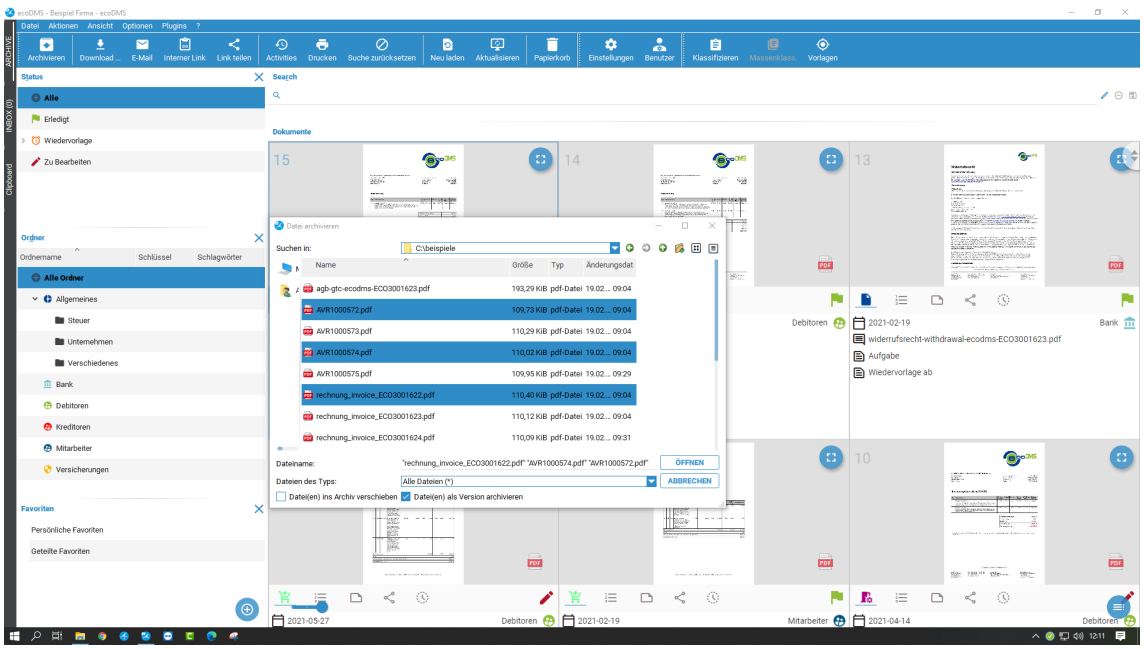


Figure 8.2: Function: Archive (here: Archive file(s) as version)

4. As the user, you must now classify the document(s). If you selected several documents, you are asked to select the classification method.

> Refer to the "Classification" chapter in this manual for more details about classification and the variou methods.

   a) **Classify Individually**: The documents are classified one by one.

   b) **Mass classification:** All selected documents receive the same classification.

c) **No classification:** (Method is not recommended.) The documents are archived but not classified. However, the documents can also be classified later.

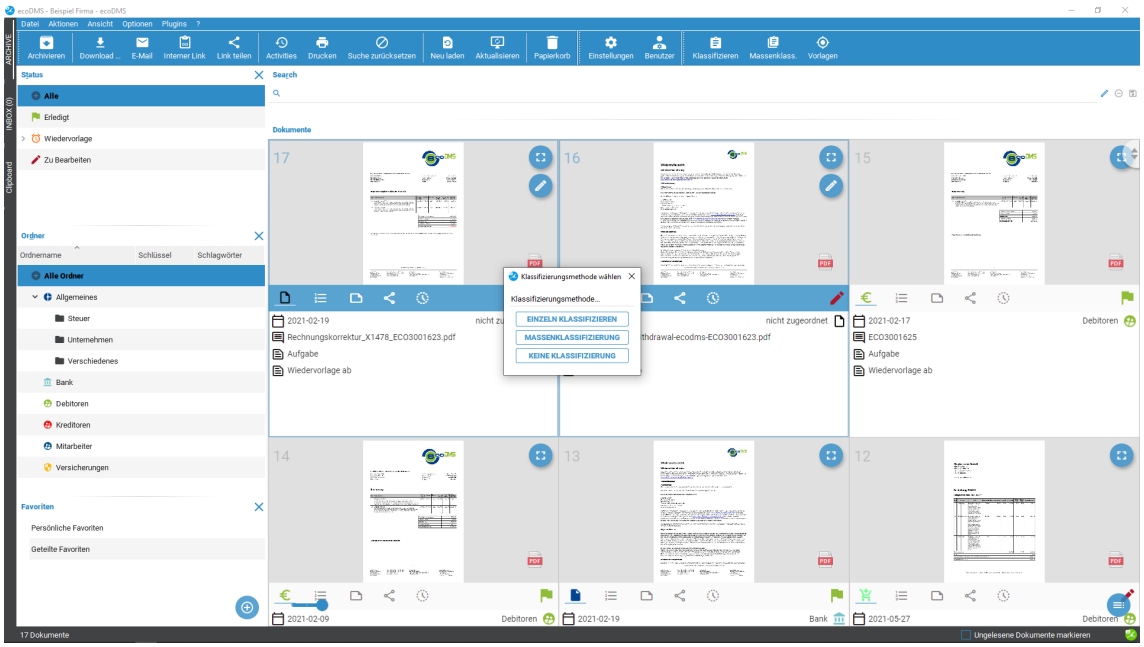


Figure 8.3: Select Classification Method

8.2 Drag and Drop

You can move documents into ecoDMS with the drag & drop function:

1. Select one or several documents you want to archive (on the desktop, for example).
2. The following additional functions are available:
   a) **Move File(s) to Archive** = Press the "Shift (Default)" shortcut
      i. ecoDMS moves the file(s) to the archive and removes them from the file system.
   b) **Archive File(s) as Version** = Press the "Alt" shortcut
      i. ecoDMS archives the file(s) as versioned document(s), so that you can add more versions to the archived document.
   c) **Move and Archive File(s) to Archive**: Press shortcut "Shift (Default)" AND shortcut "Alt"
3. Move documents to the document view or directly to the desired target folder in the ecoDMS folder structure.
4. If you selected several documents, you are asked to select the classification method.

If you selected several documents, you are asked to select the classification method. To read more about the individual methods, refer to the "Classification" chapter in this manual.

1. **Individual Classification:**
    a) Each file is classified individually one after the other.
    b) **Note:** The Save and Continue button is only enabled once a change has been made to the classification. If no change is made for the first document, you must navigate to the next document using the + / - buttons.
    c) Click the "Save and Continue" button to save the current classification and display the next document in the classification dialog
        i. If classification templates are detected, ecoDMS displays the matching attributes
        ii. Attention: Depending on your settings, the search may return various templates for one file.
        iii. Before you save, make sure you choose the correct template(s).
        iv. If there are several classification options for one document, they are displayed as a tab in the classification dialog (For more information, refer to chapter 13.7.2).
2. **Mass Classification:** All selected documents receive the same classification. The classification is assigned once.
3. **No Classification:** (Method not recommended) The documents were archived but not classified). However, the documents can also be classified later on.

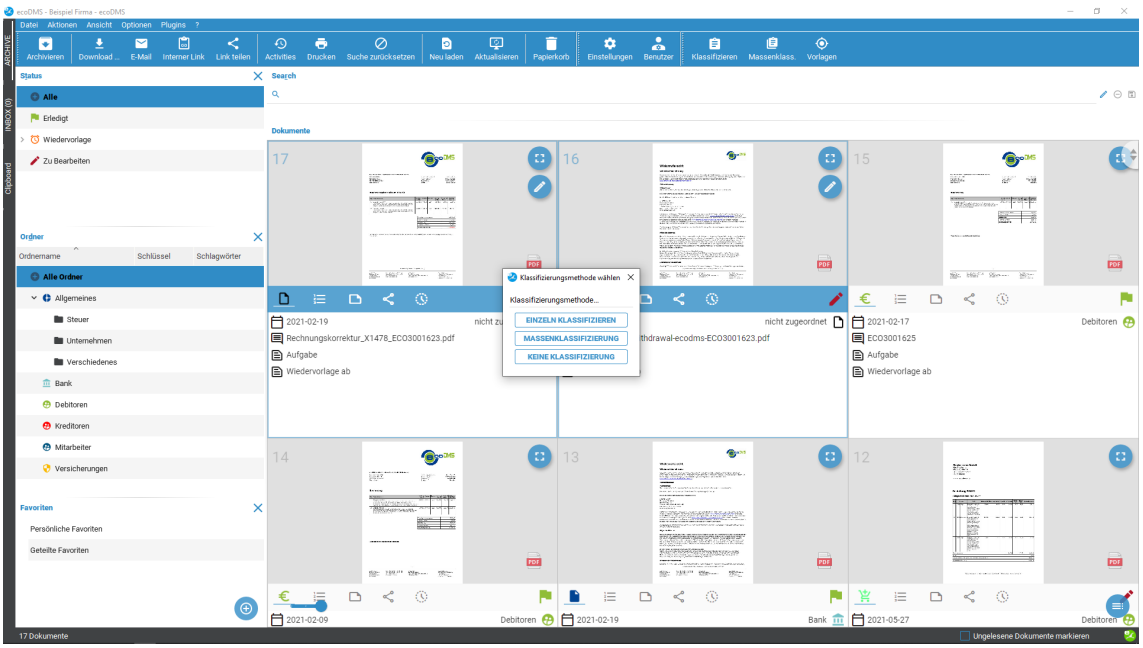


Figure 8.4: Select Classification Method

8.3 Move File(s) to Archive

You can archive files in ecoDMS and simultaneously delete them from the data carrier or the file system. To do this, ecoDMS has the following functions:

1. **Archiving with the drag & drop function**
   a) Select one or several documents you want to archive (on the desktop, for example).
   b) Press the "Shift" shortcut and drag the documents from your filesystem to the ecoDMS table via drag & drop.
      i. ecoDMS archives the file(s) as versioned document(s), so that you can add more versions to the archived document.
2. **Archiving using the dialog**
   a) Select one or several documents you want to archive via the "Archive" function (Default Archiving) in ecoDMS and activate the function "Archive File(s) as Version" in the dialog.
      i. ecoDMS archives the file(s) as versioned document(s), so that you can add more versions to the archived document.

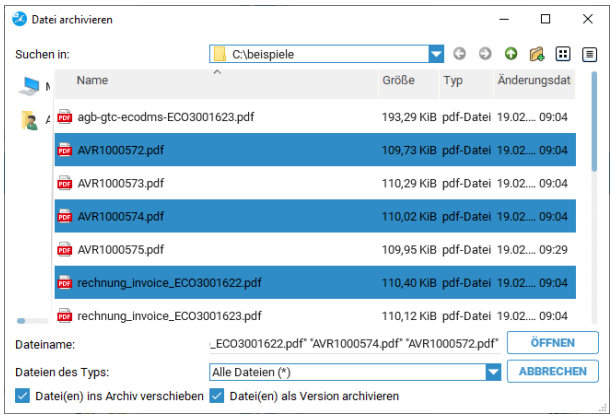


Figure 8.5: Move File(s) to Archive

8.4 Archive File(s) as Version

You can archive documents in ecoDMS in a way that allows you to add more versions to them later on. To do so, ecoDMS has the following options:

1. **Drag and drop from the file system**
   a) Select one or more documents in the file system
   b) Press and hold the Alt key and drag and drop the document(s) into ecoDMS
      i. straight into the card view
      ii. straight into the table view
      iii. straight onto a folder in the folder tree

2. **ecoDMS Function**

   a) Execute the "Archive" function. To do so, you have the following options:

      i. **Menu**: Click "File - Archive" in the menu

      ii. **Icon**: Click the "Archive" icon on the toolbar

      iii. **Right mouse-click:** In the ecoDMS table: Right-click - "Archive"

      iv. **Keyboard shortcut:** CTRL + A

   b) Select one or more documents in the file system dialog and enable "Archive File(s) as Version"

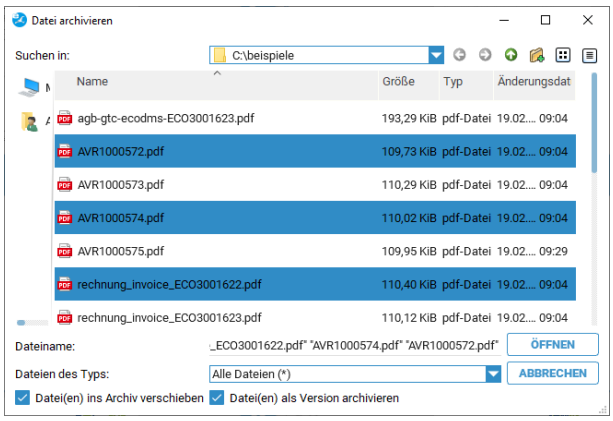


Figure 8.6: Archive File(s) as Version

3. **Office and Email Plugins**

   There is a separate entry in this manual about how to use the ecoDMS plugins.

9 e-Invoices

ecoDMS includes features for processing e-Invoices. These include:

- Import
- Conversion
- Archiving
- Quality Control

The following overview describes the key features:

- Processing from Various Sources: e-Invoices can be imported into ecoDMS using standard archiving features.
- Automatic Conversion: XML-based invoices are automatically converted into readable PDF files.
- Quality Control and Validation Report: Each converted invoice is accompanied by a validation report documenting the data quality and highlighting potential errors or warnings.
- Archiving: PDF invoices, XML files, and validation reports are fully stored in ecoDMS.
- Automatic Classification: With ecoDMS classification templates, invoices can be automatically assigned and archived.
- Validation: Incorrect or unsupported XML formats are detected.

9.1 Supported Formats

ecoDMS supports the following types of e-Invoices:

- Invoice Formats:: UBL Invoice, UBL CreditNote, CII
- Standards: EN16931, XRechnung, Peppol BIS 3, ZUGFeRD/FACTUR-X
- Versions: Various versions from 2.0 to 3.0.x for EN16931/XRechnung
- Profiles: Different complexity levels of ZUGFeRD/FACTUR-X

These formats are processed in compliance with European standards. More detailed information about the formats can be found in the ecoDMS knowledge base online.

9.2 Importing

XRechnung and ZUGFeRD invoices can be imported into ecoDMS in various ways, including:

- Desktop Client
- Web Client
- Scan Input Directory
- SidePanel

The invoices are automatically read, converted, and archived during the import process.

9.3 Archiving and File Access

ecoDMS automatically converts e-Invoices into readable PDF files during import. The following contents are archived:

- PDF Invoice
- XML File
- Validation Report
- Original File

The XML files and validation reports are embedded as attachments within the PDF files. All archived documents can be accessed directly through the ecoDMS user interface.
The specific access and display options vary depending on the invoice format:

9.3.1 XRechnung

- Standard View (Table): In the ecoDMS table view, you can access the PDF invoice, which contains the embedded attachments (XML and validation report).
- Extended View: Expanding the table entry reveals the attachments as separate files: ecodms-validation-report.html + x-rechnung.xml
- Original File: The original XML file can be accessed through the version management feature.

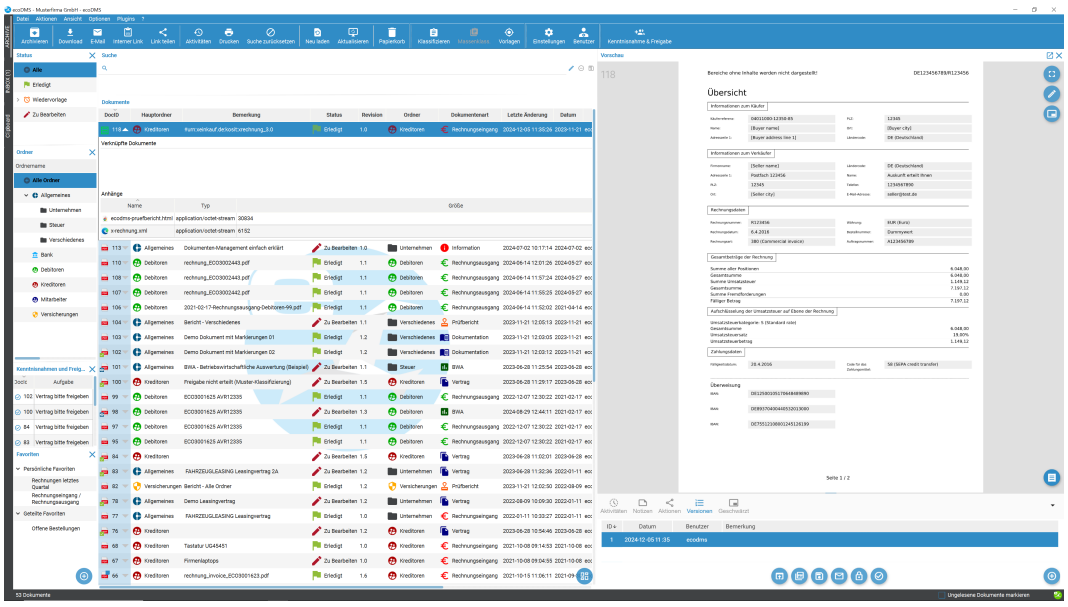


Figure 9.1: ecoDMS Table View with Archived e-Invoice, Validation Result (DocID Icon), Attachments, and a Preview (here: XRechnung)

9.3.2 ZUGFeRD

- Standard View (Table): In the table view, you can access the PDF invoice, which contains the embedded attachments (XML and validation report).
- Extended View: Expanding the table entry reveals the attachments as separate files: ecodms-validation-report.html + factur-x.xml
- Original File: The original PDF file can be accessed through version management.

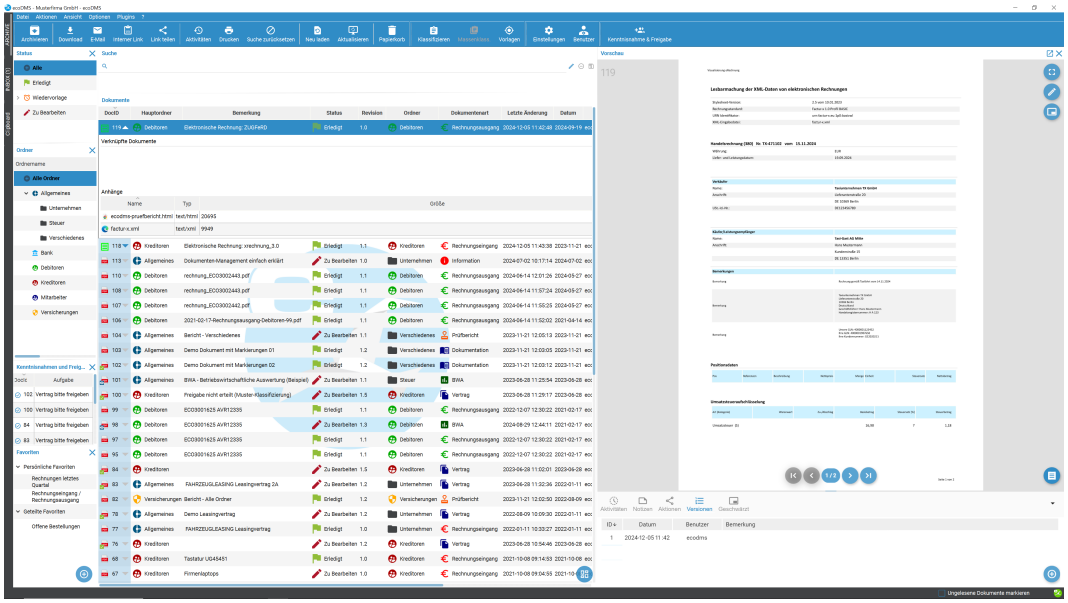


Figure 9.2: ecoDMS Table View with Archived e-Invoices, Validation Result (DocID Icon), Attachments, and a Preview (here: ZUGFeRD)

9.4 Document Status and Validation Results

An icon next to the DocID indicates the validation status:

	Status - Green: The file complies with the requirements and can be accepted.
	Status - Yellow: Warnings were detected; a review is recommended.
	Status - Red: Errors were found; the file should not be accepted.

9.5 Validation Report

- The validation reports are automatically stored in the archive and linked to the respective PDF invoice.
- Direct access to the validation report is available through the preview window (Icon: Show validation report, located at the bottom right of the preview window in the table view).



Figure 9.3: Icon: Show Validation Report (Preview Window)

For each detected e-Invoice, ecoDMS automatically generates a validation report containing the following information:

- General Information:
  - Reference number
  - Time of validation
  - Invoice issuer, invoice number, invoice date
  - Detected data type
- Compliance Check:
  - Error and warning notices
  - Result of the formal validation
- Assessment:
  - Recommendation on whether the invoice should be accepted or rejected
- Detected Content:
  - Evaluation of the data from the invoice document

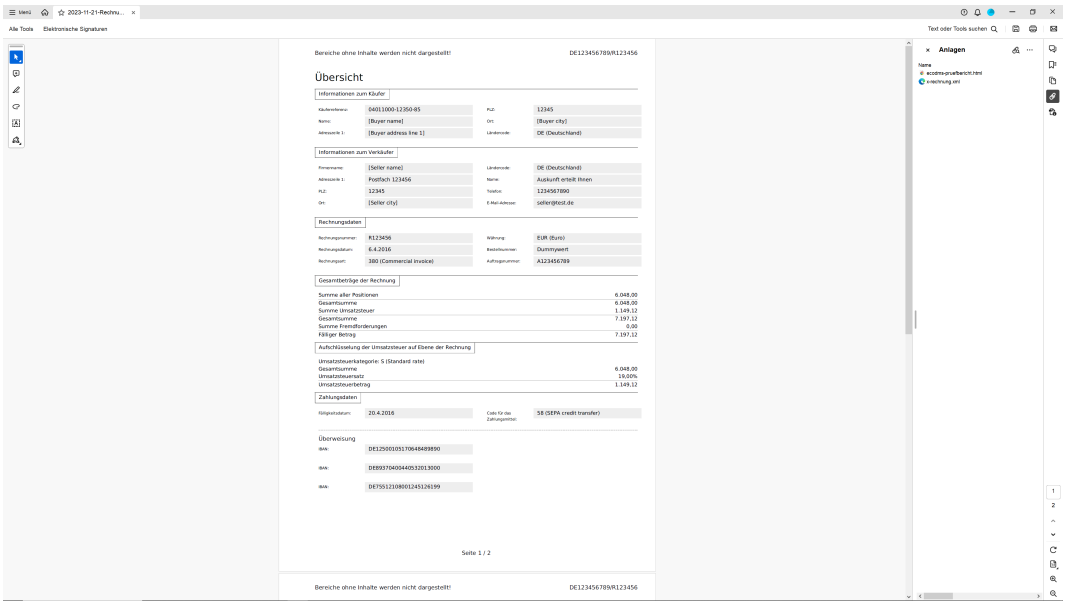


Figure 9.4: PDF of XRechnung (UBL) with Validation Report and XML Attachment (Example)

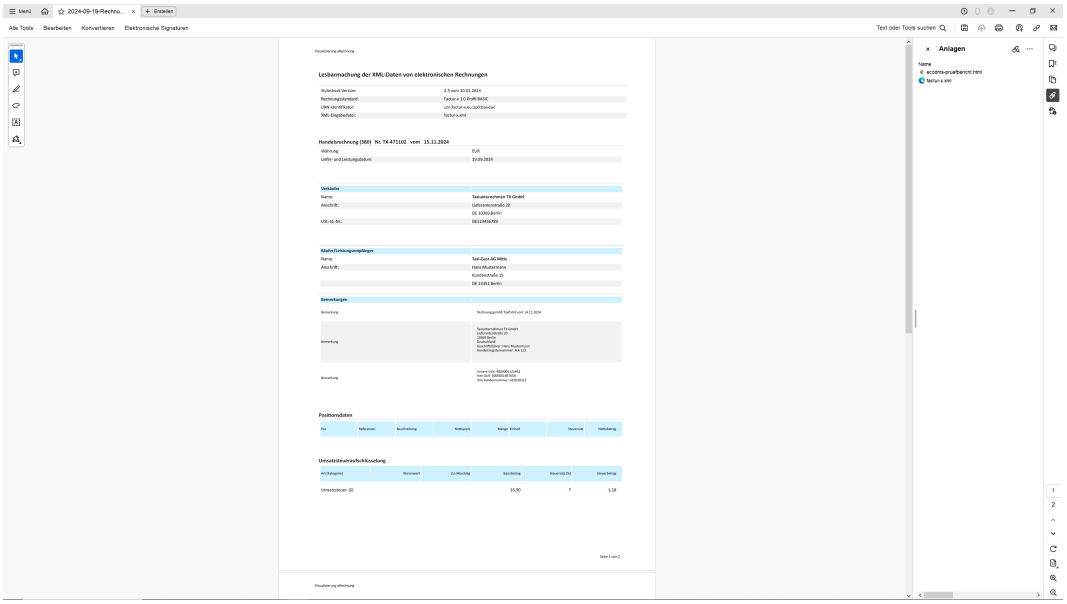


Figure 9.5: PDF of ZUGFeRD Invoice with Validation Report and XML Attachment (Example)

9.6 Scan Input and Inbox

- When adding XML files to the scan input directory, the system automatically checks their format.
- Files that do not comply with the defined schema are tagged with a timestamp and the suffix '.notsupported' or 'notvisualizable' and remain in the scan input directory.
- These files are not automatically imported into the system to prevent incorrect data transfer.

ecoDMS offers automated processing of e-Invoices via the scan input directory and the inbox. Incoming documents are checked and processed.

- Supported e-Invoice formats (see 9.1) can be directly placed in a scan input directory on the ecoDMS Server.
- ecoDMS retrieves the files from the scan input directory and loads them -depending on the configuration- into the inbox.
- If classification templates are recognized, the system applies them to the e-Invoices as well. This allows documents to be directly stored in the ecoDMS archive, including automatic classification. Alternatively, the recognized classification information from the templates is displayed in the inbox.

9.6.1 Features in the Inbox

In addition to standard functions, the following specialized features are available for e-Invoices in the inbox:

- Validation Report for Detected e-Invoices:
  - Each detected e-Invoice already receives a validation report in the inbox.
  - This is available as a link above the document preview. Clicking the link opens the HTML file of the validation report.
- Validation Status Based on Background Color:

  The status of the validation is indicated by the background color of the validation report's link line:

	Status - Green: The file complies with the requirements and can be accepted.
	Status - Yellow: Warnings were detected; a review is recommended.
	Status - Red: Errors were found; the file should not be accepted.

- e-Invoice Type in the Link Line:
  - The type of the e-Invoice is also displayed in the line, e.g.
    * EN16931 XRechnung (UBL Invoice) 3.0.x
    * ZUGFeRD FACTUR-X BASIC WL

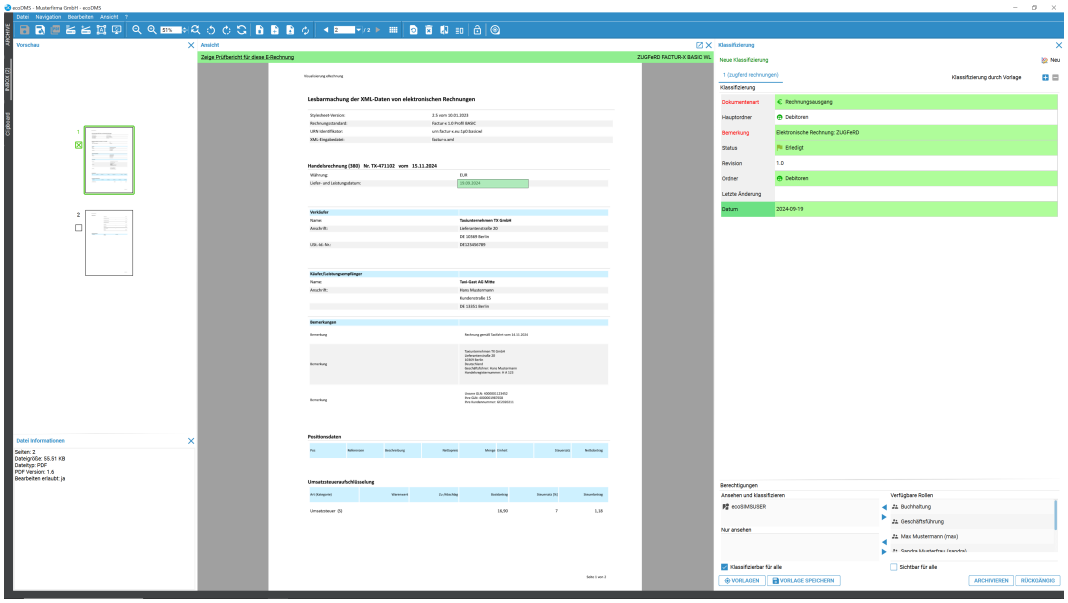


Figure 9.6: ecoDMS Inbox with an e-Invoice, Validation (green = valid), Link to the Validation Report, and Recognized Classification (here: ZUGFeRD)

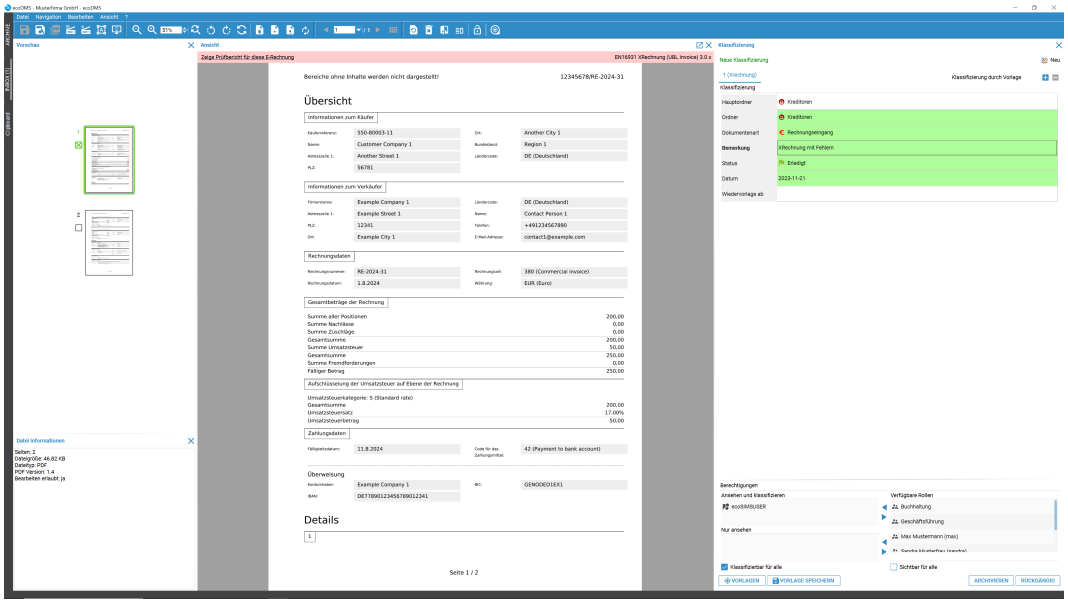


Figure 9.7: ecoDMS Inbox with an e-Invoice, Validation (red = invalid), Link to the Validation Report, and Recognized Classification (here: XRechnung)

10 Duplicate Detection

- The maximum number of displayed preview images for duplicates is 5.
- Duplicate detection must be activated in the ecoDMS settings.
- For further details, please refer to the chapters 7.2.4+12.10
- If several documents are archived, the check is carried out one after the other
- If the user is not authorised to access the document that is already in the archive, a message appears informing the user that a duplicate has been found. In this case, no preview is shown.
- Documents from the recycle bin are not taken into account.
- Attachments are not taken into account.

The duplicate detection feature in ecoDMS helps to identify duplicate documents in the system. If this detection is enabled in the ecoDMS settings, each new document to be archived is first checked to see if it has already been archived. If one or more duplicates are found, ecoDMS displays them in a dialog. Depending on the sensitivity setting, similar documents can also be found and the differences displayed in the preview window.

1. When one or more duplicates are detected, decide whether the new document
    a) should be saved in ecoDMS (= Archiving)
    b) or not (= Delete)

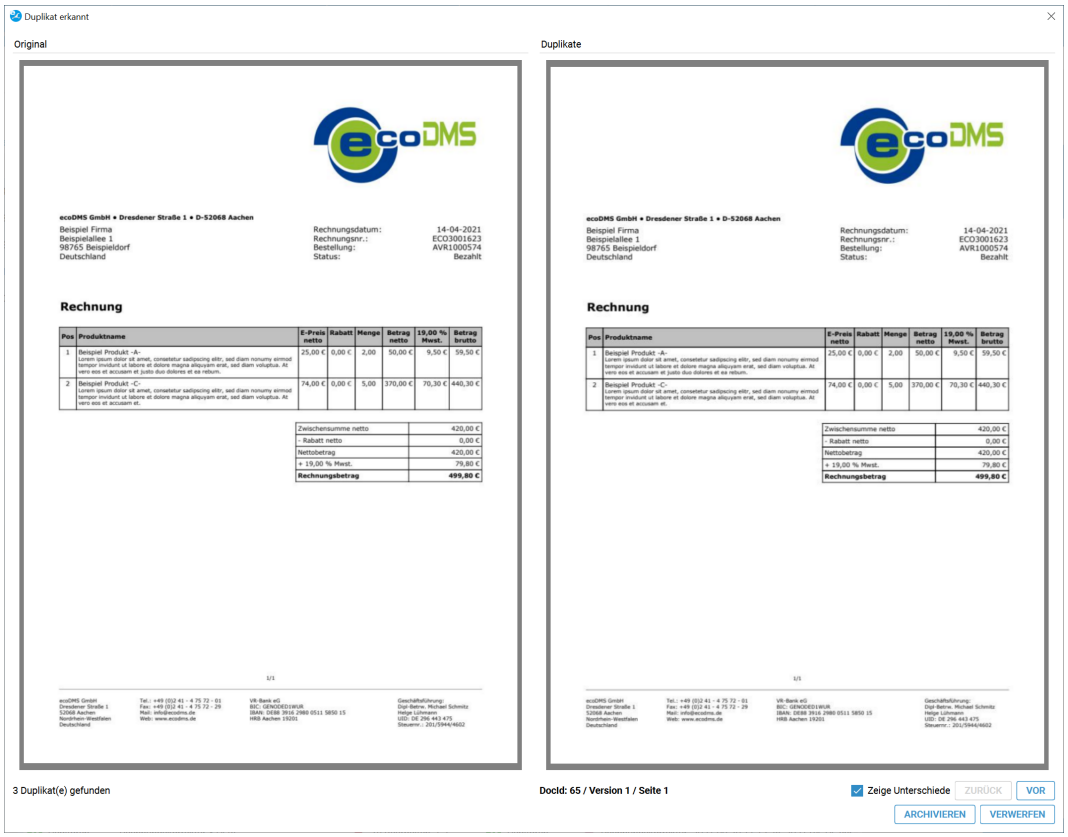


Figure 10.1: Duplicate Detection for Archiving via ecoDMS Client (Example)

11 Side Panel

Use the side panel to archive files from the file system with drag and drop. ecoDMS does not need to be open because the Side Panel is positioned on the right side of the monitor above the Connection Manager after activation. You can drag and drop the files you want to archive onto the panel. Depending on the documents you select and file recognition, the documents are automatically assigned (classified) during the archiving process.

- This feature requires a license for the full version of ecoDMS but can also be tested in the trial version. This feature is not enabled in the Free4Three version.
- Please note that these settings refer to the individual workstation and are not stored in the user profile.
- When archiving, the files must be on a local hard disk.
- Network drives (share directories) are only supported during archiving if they are an immediate part of the system.
- You cannot archive directly from a simple share directory.
- ecoDMS always stores archived files in the original format. During the archiving process, ecoDMS by default converts TIFF, PNG, JPG and non-readable PDF files to a searchable PDF file.

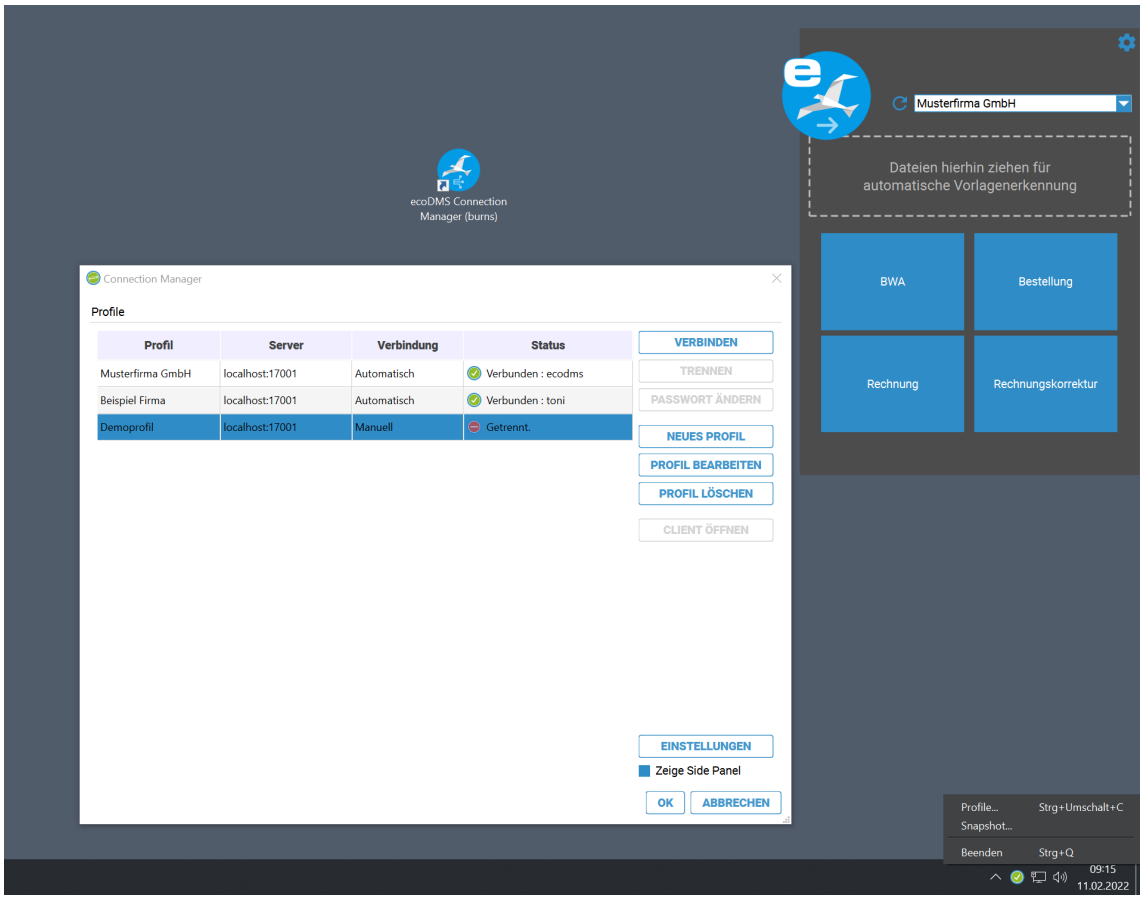


Figure 11.1: Connection Manager with enabled Side Panel

11.1 Enable / Disable Side Panel

Use the Connection Manager to activate the Side Panel in a workstation. Complete the following steps:

1. Open the Connection Manager at your workstation.
2. Enable the function "Show Side Panel".
3. The side panel is placed on the right of the screen after you have enabled it in the Connection Manager.
    a) You can hide or display it as required with a single click.
    b) To disable the side panel, deactivate the function.

11.2 Enable Classification Templates

If you want to classify documents during the archiving process, drag them onto an existing classification template in the side panel. The classification is automatically applied to the document. By default, the side panel displays all available classification templates. You can customise which templates to use for each seat.

1. On the top right of the side panel, click the "Settings" icon (gear)

2. Enable or disable the classification templates, as required
    a) All enabled templates are displayed in the side panel
    b) The other templates remain enabled, but are not available for selection in the side panel

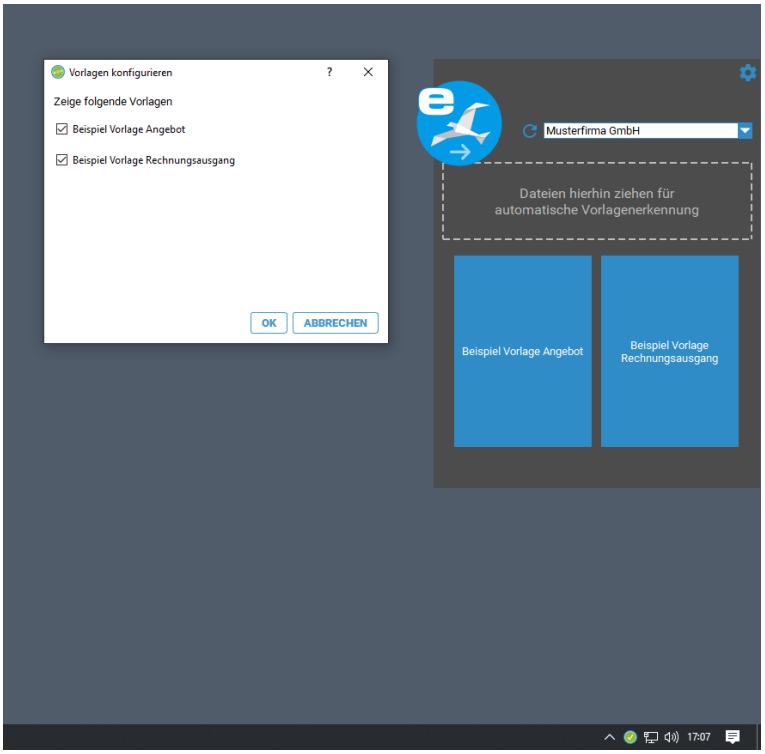


Figure 11.2: Side Panel - Settings - Configure Templates

11.3 Specify Target Profile

Depending on the setting, you can configure and link several profiles in the Connection Manager. Before you finally archive a document, make sure the correct profile is selected for archiving.

1. To do this, select the profile in the respective list in the side panel.

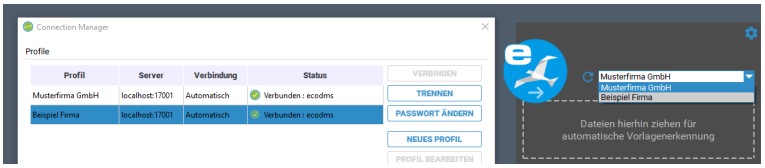


Figure 11.3: Side Panel - Select Target Profile

11.4 Automatic Archiving (Dark Process)

You can drag documents to a specific classification template in the Side Panel. The documents are then automatically archived without any need for action by the user. During classification ecoDMS fills in the recognised attributes according to the selected template.

1. Drag the document you want to archive onto the blue box of the required classification template in the side panel.
2. ecoDMS automatically classifies and archives the document in the background.
3. During the assignment process, all attributes that match the specifications in the classification template and/or can be assigned based on the template, are populated.

11.5 Automatic Pre-Classification (Classification dialog)

During archiving via the Side Panel, the matching classification template can also be determined by the system. Complete the following steps:

1. Drag the file you want to archive onto the area with a dashed frame "Drop files here
2. Then the Classification dialog opens.
   a) If one or more matching templates were found, the assignment of the recognised attributes will be carried out automatically.
3. Check the displayed classification.
   a) As an option you can make changes and/or remove the irrelevant tabs if one or more matching templates were found.
4. Complete the archiving process with "OK".

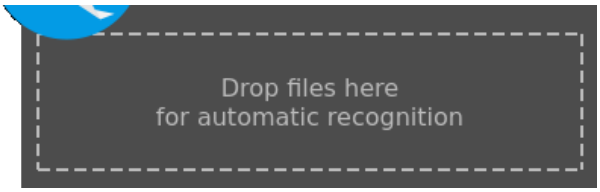


Figure 11.4: Side Panel - Automatic Classification Recognition

12 Inbox for Incoming Email Processing

The inbox is an area in the document management system where the corresponding documents are displayed after scanning. Documents can also be manually added here. The inbox serves for incoming mail processing and allows documents to be reviewed and prepared before final archiving.

Tips:

1. Ensure that the individual pages are lying the right way round. The text should always be readable from left to right. This is important for full-text indexing. If necessary, you can rotate the pages.
2. Choose the matching scan process: You can either scan documents via the ecoDMS Scaninput folder or via a TWAIN/WIA/SANE interface. Alternatively, you can import documents manually.
3. The ecoDMS Scaninput folder is the easiest option for scanning documents. You can use it when you have a network scanner or a USB scanner with the "Scan-to-Folder" feature.
4. If you want to use a TWAIN/WIA/SANE scanner, you must configure the scanner in ecoDMS. For more information, refer to the ecoDMS documentation.
5. The inbox provides several different editing functions. You can also copy, cut, and paste pages. Depending on the structure and type of a PDF file, the file can suppress these functions.
6. The archiving process saves the scanned documents to ecoDMS in the original format and also as searchable PDF/A-documents.
7. Scan the documents in the appropriate resolution: For archiving purposes we recommend scanning the documents with 200-300 DPI in black and white.

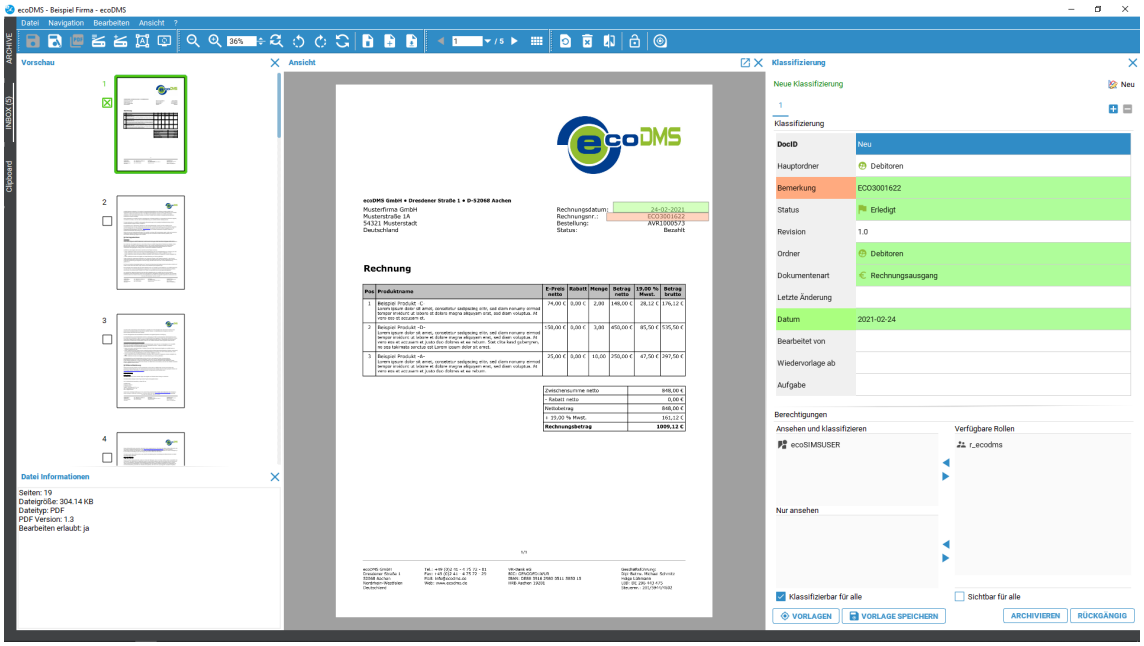


Figure 12.1: ecoDMS Inbox for Scanned Documents

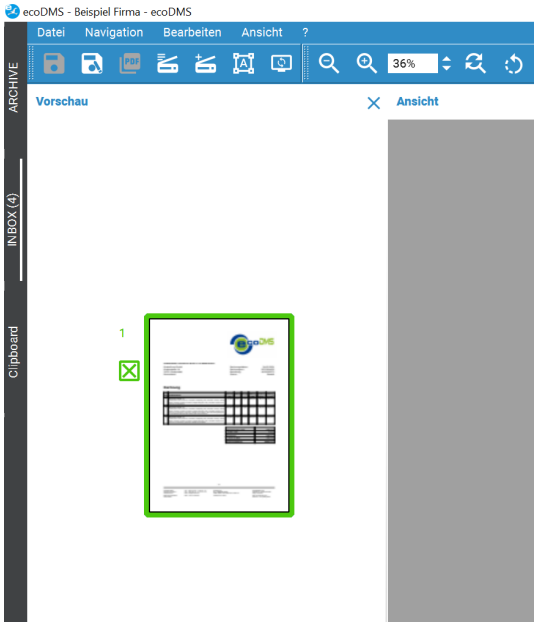


Figure 12.2: ecoDMS Client Tabs - Inbox

12.1 Supported File Formats

You can insert and process the following file formats in the Scaninput folder and in the inbox of ecoDMS:

- PDF
- JPEG / JPG
- PNG

- TIF / TIFF
- XML (X-Invoice)

12.1.1 Handling Faulty Files in Scaninput

The system automatically checks all documents in the Scaninput folder for readability and integrity. This process ensures that only technically flawless files are archived.

1. **Verification Process and Retry:** The Scaninput process attempts to capture and read a file a total of three times. If the file is damaged or does not meet the standard, the process is aborted after the third failed attempt.
2. **Marking Faulty Files:** Files that could not be read are automatically renamed by the system. They receive the suffix "[Date].notsupported" following the pattern: Filename.[Date].notsupported. These files are ignored in subsequent runs and are not archived.
3. **Processing Time:** Processing a file may take some time and also depends on the number of documents simultaneously present in the Scaninput.
4. **Recommendation:** Manually check files with the .notsupported suffix for damage and ensure they are in a valid PDF or TIFF format before resubmitting them for processing.

12.2 Scaninput

The Scaninput folder of ecoDMS enables a server-side scanning process. This means you can, for example, send the desired documents directly from a network-enabled scanner to this path on the ecoDMS server. The Scaninput folder retrieves the scanned documents, splits them into individual files when separator sheets are detected, and then transfers them to the inbox in the ecoDMS Client. If Classification Templates with automatic archiving are active, the recognized documents are immediately transferred to ecoDMS for final archiving.

12.2.1 Create Scaninput Folder

ecoDMS includes a central Scaninput folder by default, where incoming documents are stored. In the Full Version of ecoDMS, administrators have the option to set up additional Scaninput subfolders – up to 20. These additional folders can be individually configured and assigned different access permissions. They are suitable, for example, for organizing and separating documents of different users, departments, or scanners.

1. Select the Settings - Scaninput tab in the settings dialog.
2. Click "New".
3. Enter the name for the new Scaninput folder in the Scaninput folder Name entry field.

> Only use characters allowed by the file system. We recommend you do not use umlauts and/or special characters.

4. As an option, you can now assign the further settings to this folder.
5. Click "Apply" to save the process in the settings dialog.
6. You can create a total of 20 Scaninput subfolders in this way.

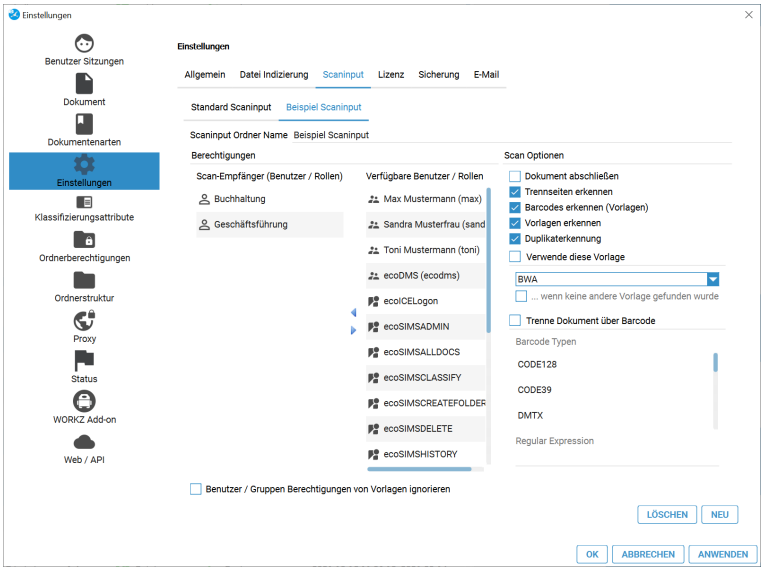


Figure 12.3: Settings - Settings - Create Scaninput

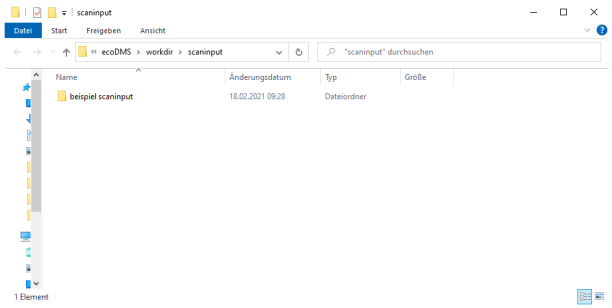


Figure 12.4: Dateisystem (ecoDMS Server): ecoDMS - workdir - Scaninput

12.2.1.1 Permissions (Scan Recipients)

Each Scaninput folder can be given a separate permission. The scanned documents are then visible for the stored scanning receiver only.

1. If the Scan Recipients window remains empty, the documents which were scanned via this folder are visible to all users in the Inbox.
2. If users and/or groups are dragged into the Scan Recipients field, the documents scanned via this folder automatically receive the permission stored there, and are thus only visible for these users.
   a) Exception: Users with the role "ecoSIMSALLDOCS". They can view all documents / folders independent of their permissions.

12.2.1.1.1 Ignore Users / Groups of Templates Here you can specify how to handle permissions from classification templates (templates designer) if you set additional Scaninput folder permissions.

1. **Function enabled:** If you enable this checkbox, documents are pre-classified as usual when ecoDMS recognises a classification template. However, the permission in a template is removed and replaced by the permission stored in the Scaninput folder.
2. **Function disabled:** If you do not enable the "Ignore Users / Group Permissions from Templates" checkbox, the permissions stored in the template continue to apply when a classification template is recognised. If the "Classification Template" does not contain the user who scanned the document, the document is not visible to this user in the Inbox.

12.2.1.2 Scan Options

For each Scaninput folder you can define different scan options:

12.2.1.2.1 Finalise Document Per default, all documents archived through the Scaninput folder are archived with the "Not Finalised" status. This means that you have the option to add further versions through version management in ecoDMS Client (not via inbox). To archive these documents as "Finalised", thus preventing the addition of further versions, you can select the "Finalise Document" function for the affected Scaninput folder.

12.2.1.2.2 Recognise Separator Pages To scan several documents simultaneously, we recommend you use the official ecoDMS separator pages for document separation. The software splits the documents automatically into individual files. If you want ecoDMS to recognise the separator pages, you must enable this feature for each Scaninput folder.

12.2.1.2.3 Recognise Barcodes (Templates) Use the template designer to create barcodes. If you want the system to recognise the barcodes during the scan process, enable the function "Recognise Barcodes (Templates)" for the respective Scaninput folder.

12.2.1.2.4 Recognise Templates The template designer enables automatic classification and archiving of documents. If you want ecoDMS to recognise the classification templates during the scan process via the Scaninput folder, you must enable this feature for the respective Scaninput folder.

12.2.1.2.5 Duplicate Detection

- To activate this feature, duplicate detection must also be activated globally in the ecoDMS settings.
- For more information about duplicate detection in ecoDMS, please refer to the chapter 7.2.4.

The duplicate detection feature in ecoDMS helps you to identify duplicate documents in the system. These instructions show you how to activate the duplicate detection for scan input folders so that it also works for documents that are scanned via such folders.

1. Enable duplicate detection via the "Duplicate detection" checkbox for the desired scan input folder
2. Save the process with "OK" or "Apply"

12.2.1.2.6 Use This Template

- Each Scaninput folder can have its own classification template. As soon as a document is received through this folder and appears in the inbox, the template is applied automatically.
- If you want all documents from a specific Scaninput folder to be classified the same way, you can select a fixed template. This template will then be used for all incoming documents in that folder, regardless of whether other templates might be more suitable.
- In this case, the system will use only the selected template for that folder.

12.2.1.2.7 Separate Documents with Barcodes To separate several documents into individual files, you can use individual barcodes. These can be created with any application. If you want ecoDMS to recognise the barcodes during the scan process, enable the following settings:

1. Enable the function "Separate Documents with Barcodes".
   a) This automatically enables the prerequisite function "Recognise Separator Pages".
2. Select one or more barcode types that ecoDMS should recognise.
3. **Optional experts function:** As an option, you can further limit and describe the barcode by entering regular expressions. The following expressions serve as an example:
   a) Barcode starts with
   ```
   TEXT(.*)
   ```
   b) Barcode contains
   ```
   (.*)TEXT(.*)
   ```
   c) Barcode ends with
   ```
   (.*)TEXT
   ```
   d) Barcode starts with "VC", followed by 5 digits and ends with "-V01"
   ```
   VC[0-9]{5}\-V01
   ```

12.2.2 Delete Scaninput Folder

Custom Scaninput folders can also be deleted. In this case the folders are removed in the settings dialog. The Standard Scaninput folder cannot be deleted. To delete, complete the following steps:

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

2. Select the "Scaninput folder" tab you want to delete.
3. Click the "Delete" button.
    a) The "Scaninput folder" is now deleted in the settings dialog.

For safety reasons, the folders remain in the file system. To delete the folders in the file system, the administrator merely needs to select the folder in the file system and remove it manually. Before deleting, ensure that there are no documents in the "Scaninput folder".

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

12.2.3 Scaninput: Scan Documents

- The Scaninput folder of ecoDMS allows a server-side scanning process. This means you can, for example, send documents to this folder on the ecoDMS Server from a network-compatible scanner. The Scaninput folder calls the scanned documents, splits them into individual files where it detects separators, and transfers them to the inbox in ecoDMS Client. If classification templates with automatic archiving are enabled, the recognized documents are transferred straight to ecoDMS for final archiving.
- ecoDMS recommends the Scaninput folder as the scanning method because only this method executes all server-side processes (including automatic template recognition).

12.2.3.1 Target Path for Scaninput Folders

In order to access this folder, the permissions must be adjusted accordingly. The Scaninput folder is stored at the specified data path that was chosen during the installation of ecoDMS Server:

1. Under Ubuntu/Debian it is always at:

```
/opt/ecodms/workdir/scaninput
```

2. Standard Windows:

```
\%ProgramData%\ecodms\workdir\scaninput
```

If you have created custom Scaninput folders, they are subfolders in the respective data path.

12.2.3.2 Scan Process

1. In your scanner, setup the destination path for the Scaninput folder to which you want to scan the documents.
2. Scan you documents to the "Scaninput Folder".

3. ecoDMS receives the documents from the Scaninput folder after just a few seconds.
    a) This is the reason why the documents are displayed in the folder just for a few seconds.
    b) It can take a few minutes to retrieve the documents, depending on the file size.

12.2.3.3 Manual Access

You can also manually insert supported file formats (see 12.1) into the Scaninput folder — completely without a scanner.

1. Access the desired Scaninput folder from your workstation. Use the address of the target path for this.
2. Place the files in the Scaninput folder.
3. The client receives the documents from the Scaninput folder within a few seconds.
    a) For this reason, the documents are only displayed in the folder for a few seconds.
    b) Depending on the file size, retrieving the documents via the client may take a few minutes.

12.3 Separator Pages for the Scan Process

Notes:

- The document management system recognizes separator pages and empty pages and automatically hides them.
- You can enable and disable this option via the ecoDMS interface (refer to 12.2.1.2).

Advantages of a separator page:

- Automatic document separation: You no longer need to separate documents manually in ecoDMS.
- A quicker scanning process: You can scan multiple documents in one process without having to feed each document separately into the scanner.
- More clarity: The documents are saved to separate files during the archiving process, which improves the organization in ecoDMS.

Separator pages help you scan multiple documents in a batch scan. They indicate the beginning of a new document to ecoDMS. The system automatically splits the documents and reads them in separately.

1. ecoDMS provides a PDF template for separator shee `www.ecodms.de/en/download/ecodms-archive/separator-sheet`
    a) Print this template double-sided.
    b) Ensure that the letter "T" is visible on both the front and back of a DIN A4 sheet.
2. Insert a separator page at the end of a one or multiple page document. Then insert the next document behind the separator page.
3. Repeat this procedure until all documents in the batch have been scanned.

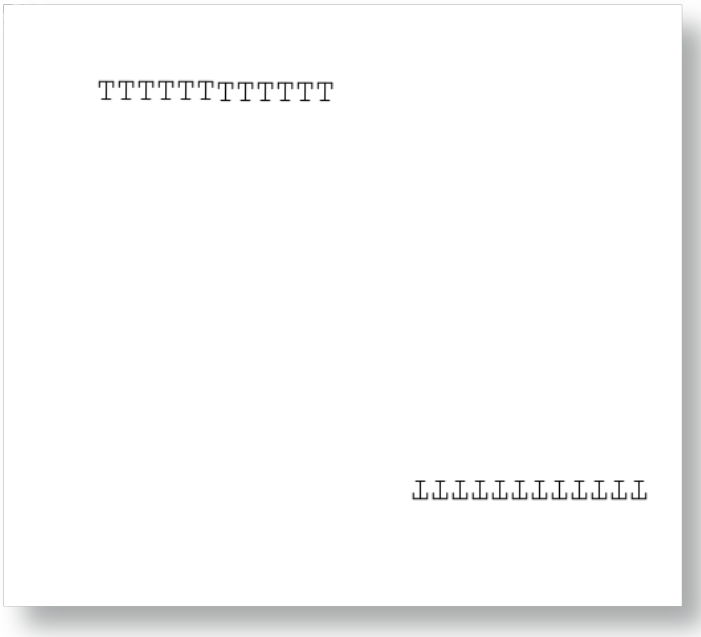


Figure 12.5: Separator Page

12.4 TWAIN/WIA/SANE: Scan Documents

You can scan documents straight to the ecoDMS inbox via a TWAIN/WIA/SANE interface.

- The TWAIN/WIA/SANE interface is compatible with many but not all scanner models.
- If you scan via TWAIN/WIA/SANE interface, the pre-classification is only possible via the function "Search Matching Classification Template".
- You can only scan TIFF files with this interface.
- The Scaninput folder is recommended as the scanning method because only with this method all processes on the server (including automatic template recognition) can be carried out.

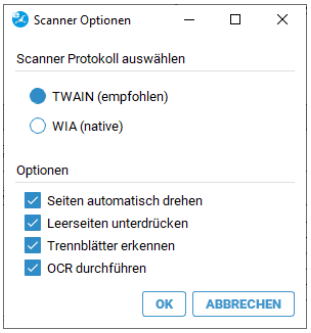


Figure 12.6: ecoDMS Inbox: TWAIN/WIA/SANE Interface Options

12.4.1 Select Scanner

To use the interface, you have to select a scanner. Complete the following steps:

1. Click the menu "File - Scan - Select Scanner"
    a) The Select Scanner dialog opens.
2. Choose from the list of available scanners the required device.
3. Confirm this process with "OK" or cancel it with "Cancel".

12.4.2 Configure Scanner

After you have chosen a scanner, you have to configure it. Complete the following steps:

1. Click the menu "File - Scan - Settings"
    a) The "Scanner Options" dialog opens.
2. Select the matching scanner log according to the operating system and the scanner.
    a) TWAIN
        i. WIA
        ii. SANE
        iii. ...
3. Enable the required functions for the scan process in the "Options".
    a) **Rotate pages automatically**
        i. The system automatically rotates pages that were scanned in upside down. Enable this feature for the rotation process.
    b) **Suppress empty pages**
        i. The system can automatically detect and remove empty pages. Enable this feature for the rotation process.
    c) **Detect separator pages**
        i. To scan in several documents simultaneously, we recommend you use the official ecoDMS separator pages for document separation. The software splits the documents automatically into individual files. Enable this feature to detect the separator pages.
    d) **Execute OCR**
        i. OCR recognition converts the scanned TIFF file into a searchable PDF.
4. Confirm your configuration with "OK" or cancel it with "Cancel".

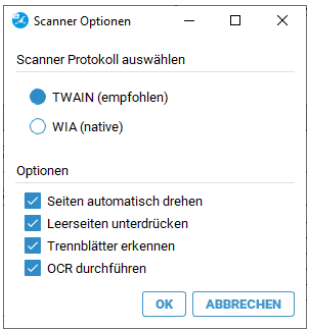


Figure 12.7: ecoDMS Inbox: TWAIN/WIA/SANE Interface Options

12.4.3 Scan New Document

To scan a completely new document, complete the following steps:

1. Select the function "Scan New Document" with one of the following options:
   a) Click the menu "File - Scan - Scan New Document" **or**
   b) Click the toolbar icon "Scan New Document" **or**
   c) Enter this shortcut: F10
2. If several scanners are connected, you must select a source in the next step.
   a) If only one scanner is connected, the respective scanner window opens. The window is different for different scanners.
3. Start scanning process.
4. The scanned pages are loaded as a new document in the last position in the Inbox.



Figure 12.8: Icon - Scan New Document

12.4.4 Add Pages to Document

To scan a completely new document, complete the following steps:

1. Call up the document in the client.
2. Select the function "Add Pages to Document" with one of the following options:
   a) Click the menu "File - Scan - Scan New Document" **or**
   b) Click the toolbar icon "Scan New Document" **or**
   c) Enter this shortcut: F10

3. If several scanners are connected, you must select a source in the next step.
    a) If only one scanner is connected, the respective scanner window opens. The window is different for different scanners.
4. Start scanning process.
5. The scanned pages will be added to the existing document.

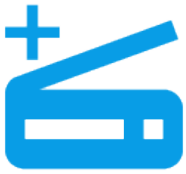


Figure 12.9: Icon - Add Page(s) to Document

12.5 Request Scans

After scanning, the scanned documents are retrieved via the Inbox and prepared for archiving. When starting the programme, the available documents are loaded automatically one after the other. While working with the Inbox, the user can also request the documents manually. To display the scanned documents in ecoDMS, they must first be classified and archived through the Inbox.

To view and update the documents and classifications manually in the Inbox, you have the followings options:

1. To do this, click the icon "Request Documents (F5)" on the toolbar **or**
2. Enter this shortcut: F5 **or**
3. When the Inbox restarts, it automatically retrieves and updates the documents and classifications.



Figure 12.10: Icon - Request Documents

12.6 Display Overview of All Scans

The "Inbox Overview" window offers an overview of all documents available to the user in the inbox. Scanned documents are displayed as a preview. Apart from the document preview, the overview displays the number of pages in a file. There is also an option to remove documents that are not required. This is possible because the inbox is not the final archive but a preliminary step.

1. Click the Overview icon on the toolbar to open the preview of all available documents in the inbox.



Figure 12.11: Display Overview of All Scans (Icon)

2. Click the icon to open an overview of all documents in the inbox that are available for this user.

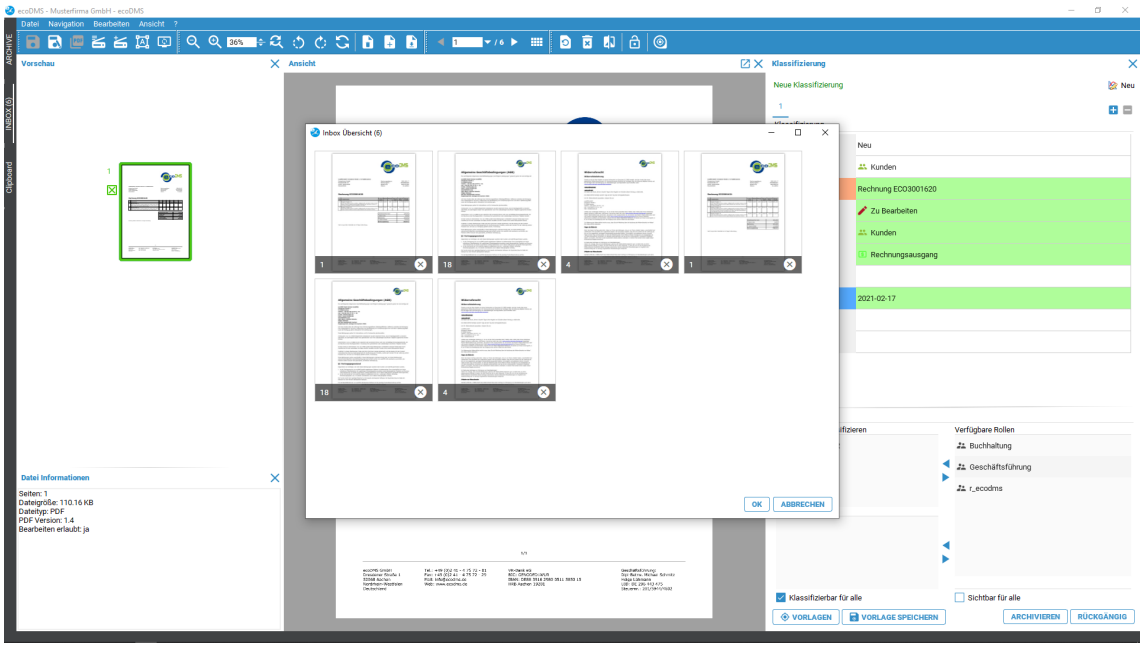


Figure 12.12: Übersicht aller eingescannten Dokumente in der Inbox

12.6.1 Delete Documents

Documents that are not required can be removed from the inbox and deleted irrevocably. This is possible because the inbox is not the final archive but a preliminary step. You cannot undo this operation. To restore deleted documents, you must scan them again and retrieve them through the inbox. This is how to delete a document from the inbox via the overview:

1. Click the X icon below the document you want to delete.
2. Confirm the confirmation prompt with "Yes" or abort the deletion process with "No".

12.7 Classification

Via Classification you can assign, for example, the virtual destination folder in ecoDMS, the document type, the status, the responsibilities and many more archiving details to each file you archive. These details allow documents to be

systematically filed and easily retrieved through keyword search as an alternative and/or in addition to the full-text search.

- Die Inbox von ecoDMS verfügt über einen eigenen Klassifizierungsdialog, so dass die eingescannten Dokumente direkt in der Inbox (automatisch via Vorlagen Designer oder manuell durch den Benutzer) klassifiziert werden können.
- Die Klassifizierung im Allgemeinen ist detailliert im Kapitel "Klassifizierung" in diesem Handbuch beschrieben.

12.7.1 Copy & Paste Content & Barcodes

You can select document content or a barcode from the document, and copy it for the classification. To do so, complete the following steps:

1. In the Classification dialog, select the input or date field to which you want to copy the contents or the barcode information.
2. The following options are available for copying content:
   a) Overwrite existing text in the attribute of a free text field (for example, comment):
   Press the CTRL key and Right-click an area to select it in the scanned document.
   b) Add texts to an existing text in the attribute of a free text field (for example, comment):
   Press the CTRL key and the Shift key and Right-click an area to select it in the scanned document.
   c) Barcode in a document can be decoded and entered as text:
   To decode barcodes in a document, press and hold the CTRL + Alt keys and select the area while pressing the right mouse button.

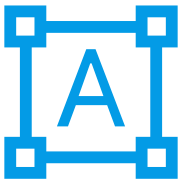


Figure 12.13: Icon - Copy Text from Document

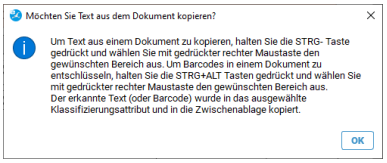


Figure 12.14: Explanation: Copy Text from Document

12.7.1.1 Date Formats

ecoDMS recognises the following date formats:

1. yyyy.MM.dd
2. dd.MM.yyyy
3. dd.MM.yy
4. dd. MMM yyyy
5. dd. MMMM yyyy
6. dd MM yyyy
7. dd MMMM yyyy
8. dd.MMyyyy
9. ddMMyyyy
10. ddMM.yyyy

12.7.2 Default Classification (For User Workstation)

To classify scanned documents, you can define a default classification on your workstation. This is loaded per default when a document is scanned in and retrieved with the Inbox at your workstation.

- The default classification is loaded exclusively in the Inbox at your workstation if no other classification template is recognised.
- If you select the "Reset Classification" function in the Classification dialog, the default classification will not be loaded again for the next documents.
- Please note that these setting refer to the individual workstation and is not stored in the user profile.

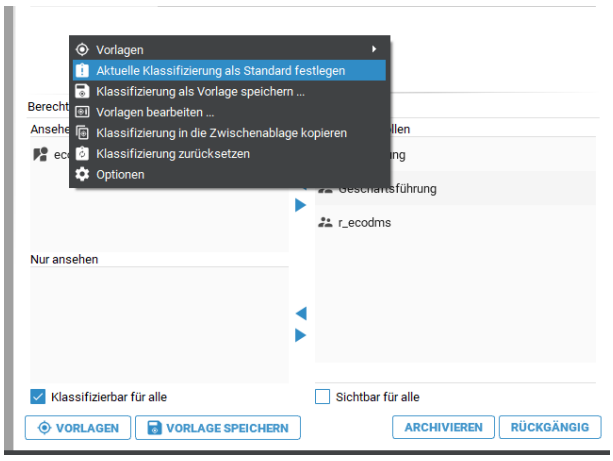


Figure 12.15: Set Default Classification in Inbox

12.7.2.1 Create Default Classification

To create a default classification for your workstation, complete the following steps:

1. In the Inbox Classification dialog, specify the classification information and/or the permissions which you want to store as the default settings.
2. Right-click the "Permissions" window.
3. Click "Specify current classification as default".

12.7.2.2 Delete Default Classification

If you defined a default classification at your workstation, you can delete it again if necessary. For future classifications, the default classification will no longer be loaded in the Inbox. To delete a default classification at your workstation, complete the following steps:

1. In the Classification dialog, go to any document in the Inbox with the mouse.
2. Right-click the "Permissions" window.
3. Click "Reset Classification".

12.8 Automatic Document Recognition: Search for Classification Templates

Tip: For information on how to create, edit, or load a classification template, refer to the manual under [chap:Classification-Templates]. Additional guidance on manually applying a template in the Inbox can be found under 14.4.2

Classification templates help ecoDMS automatically recognize and correctly assign documents. The system uses specific characteristics of a document—such as tags, barcodes, layout, metadata, or marked fields. When a new document is imported into the ecoDMS archive and its properties match an existing template, the document is automatically classified and, depending on the configuration, archived immediately.
Documents in the Inbox can be classified in two ways:

- *Automatically via a matching classification template*
- *Manually via the classification dialog*

If needed, you can also manually search and apply a suitable template. This is particularly useful when a document was not automatically recognized during import—e.g., after scanning or importing via TWAIN, WIA, SANE, or other sources. **Here's how:**

1. Open the Inbox in ecoDMS.

2. Select the desired document.
3. Perform one of the following actions:
   a) Click the "Search for matching classification template" icon in the Inbox toolbar
   b) Or press the F4 key on your keyboard
4. ecoDMS will search all available templates and assign the matching one to the document—if a match is found.



Figure 12.16: Search for Matching Classification Template in the Inbox (Icon)

12.9 Classification Detection

- Classification detection must be activated in the ecoDMS settings.
- If a classification template is found for this document, the classification data from the template is filled in instead.
- Classification dectections are highlighted in a purple color.
- For further details, please refer to the chapter 7.2.5

With the "Classification Detection" feature in ecoDMS (see7.2.5), documents can be automatically pre-assigned with classifications based on their similarity to already archived and classified documents. If this detection is enabled in the ecoDMS settings, the system first checks whether a suitable classification is found for each new file received in the inbox. You can also customize the suggestion if required.

12.9.0.1 Date Detection

- If classification detection is activated, the system also searches for a suitable date in the document.
- For example, if an invoice date is found in the document for invoices, this is automatically set in the "Date" classification attribute.
- This is independent of the sensitivity settings and also independent of any other similar documents found.

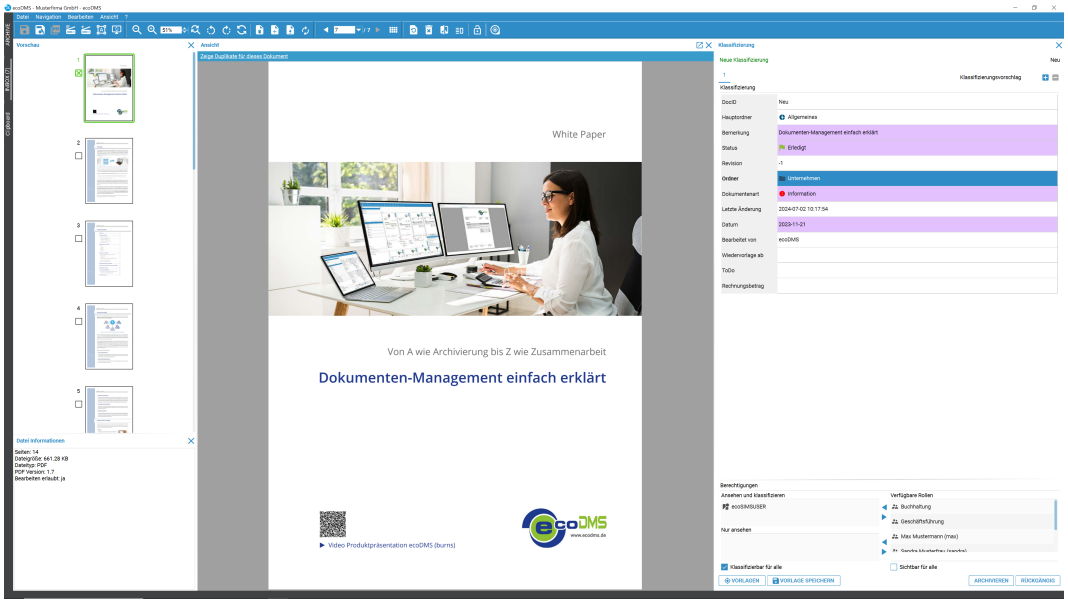


Figure 12.17: Classification Detection in the ecoDMS Inbox for Scanned Documents (Example)

12.10 Duplicate Detection

- The maximum number of displayed preview images for duplicates is 5.
- Duplicate detection must be activated in the ecoDMS settings (see 7.2.4)
- Duplicate detection via scan input: The detection must be enabled both in the general ecoDMS settings and in the scan input settings of the respective folder.
- The duplicate detection for the scan input can be activated / deactivated in the settings under "Settings -> Scan input" (12.2.1.2).
- During dark processing (automatic archiving in the background: dark process), the document is sent to the inbox when the duplicate is recognized.
- If the user is not authorized to access the document that is already in the archive, a message appears informing the user that a duplicate has been found. In this case, no preview is shown.
- Documents from the recycle bin are not taken into account.
- Attachments are not taken into account.

The duplicate detection feature in ecoDMS helps to identify duplicate documents in the system. If this detection is enabled, each new inbox document is first checked to see if it has already been archived in ecoDMS. If one or more duplicates are found, ecoDMS displays information in the inbox. Depending on the sensitivity setting, similar documents can also be found and the differences displayed in the preview window.

1. If duplicates are found, the inbox displays a "Show duplicates for this document" message at the top of the preview window
2. Click on this information

3. If one or more duplicates are detected, decide whether the new document should
   a) remain in the inbox for further archiving (= Close)
   b) should be deleted (= Delete)
      i. Then confirm the deletion process

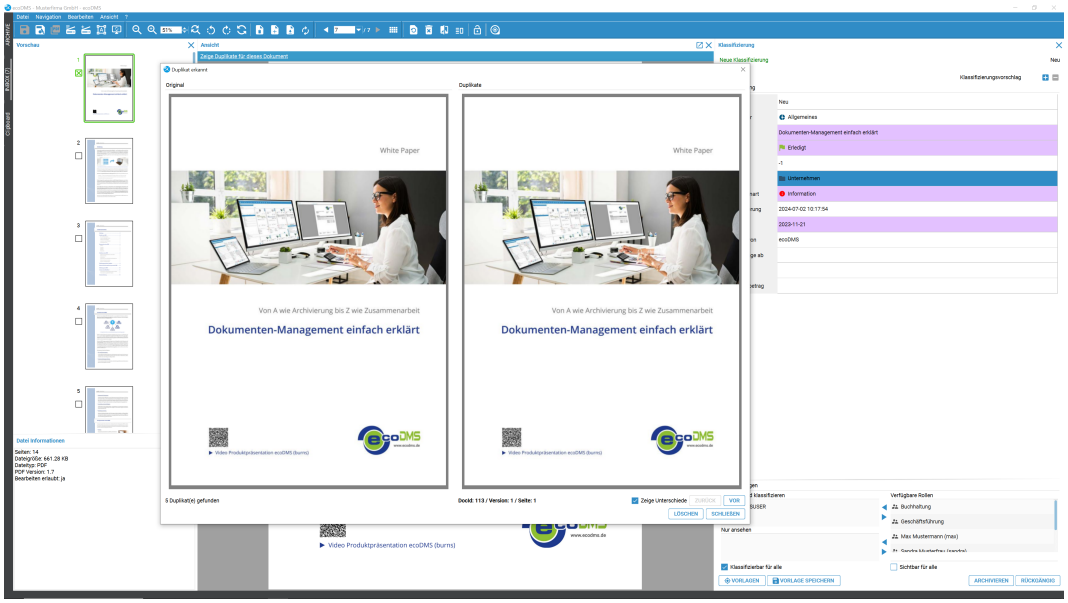


Figure 12.18: Duplicate Detection when Archiving in the ecoDMS Inbox (Example)

12.11 Archive Scanned Documents

To archive the scanned documents via the Inbox, complete the following steps:

1. Click the button "Archive" in the Classification dialog.

   - This process cannot be undone.
   - Later changes to the document are now no longer possible because of audit-proof.

2. The documents are archived as "Finalised" files. You can add any versions.

   - After the archiving process, the scanned PDF or TIFF files are automatically converted into the (readable) PDF/A format.
   - The quality and size of the file determine the conversion time and the feasibility.
   - After successful conversion, the PDF/A can be opened in ecoDMS Client. Until then the original file remains.
   - You can open the PDF/A via the table. You can retrieve the original files via the version management function.

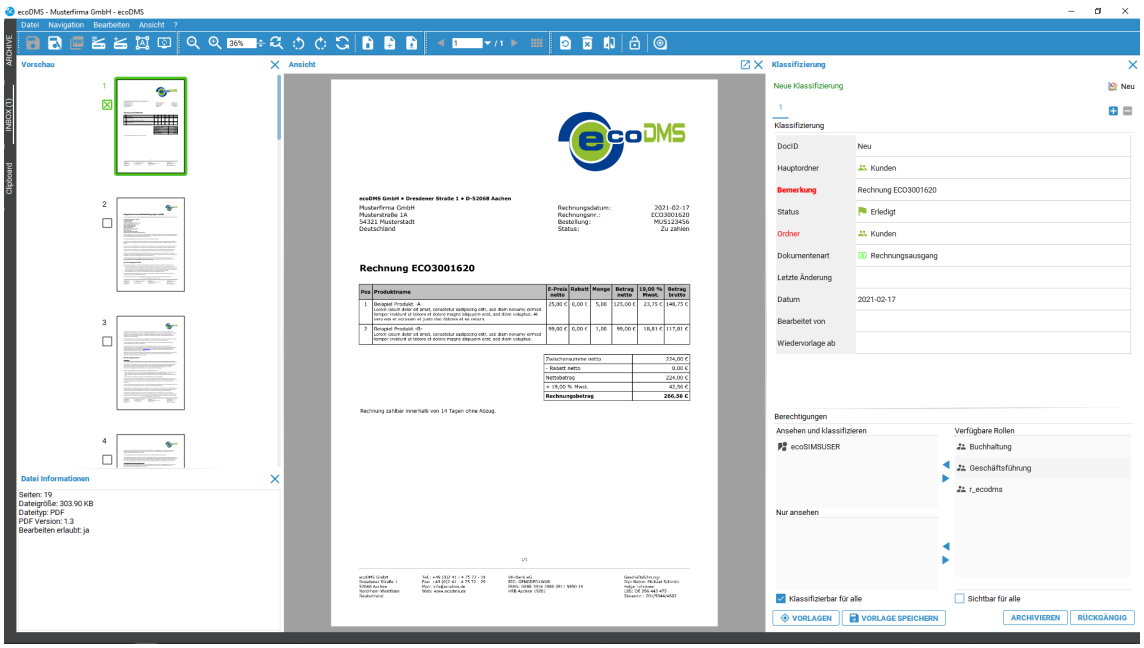


Figure 12.19: Classification & Archiving via Inbox

12.12 Display Statistics

This feature is exclusively available to ecoDMS administrators.

The statistics document and display the processes of a scanned document in a flow chart. Using the statistics, you can trace each step of the route a document takes from scanning to archiving. The documents are displayed in the statistics until they are archived. To open the statistics, complete the following steps:

1. In the menu bar, click "Edit - Display Statistics".
2. The Statistics dialog opens.

- **Process list:** In this area, select the document whose processes you want to view.
- **Reload Process List:** Clicking this button refreshes all available processes.
- **Reload View Clicking:** this button refreshes the view for the selected process.
- **Reload View Automatically:** Enabling this feature automatically refreshes the progress of the respective document processes.



Figure 12.20: Statistics

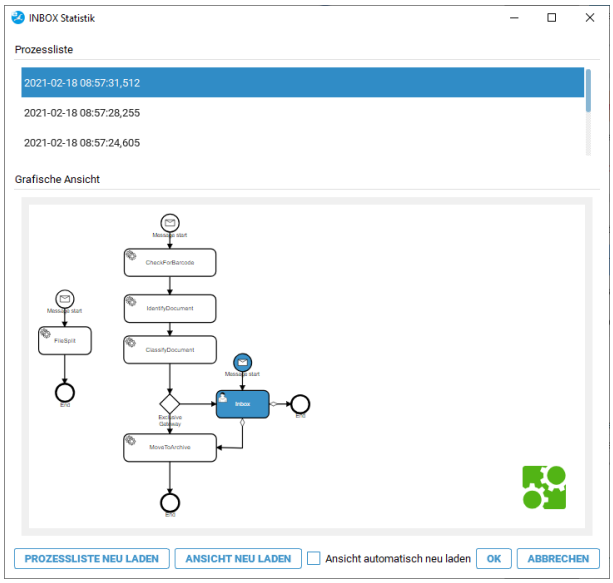


Figure 12.21: Inbox - Statistics (Example)

12.13 Next Document

The documents are loaded and displayed one after the other in this application. You can switch between the documents. To skip to the next document, you have the following options:

1. Click the toolbar icon "Next Document" **or**
2. Click the menu "Navigation - Next Document" **or**
3. Enter this shortcut: CTRL + Arrow right



Figure 12.22: Icon - Next Document

12.14 Previous Document

The documents are loaded and displayed one after the other in this application. You can switch between the documents. To skip to the next document, you have the following options:

1. Click the toolbar icon "Previous Document" **or**
2. Click the menu "Navigation - Previous Document" **or**
3. Enter this shortcut: CTRL + Arrow left



Figure 12.23: Icon - Previous Document

12.15 Import Documents

TIFF and PDF files can be imported into the Inbox.

12.15.1 Import Documents (Drag & Drop)

- Please note that in this case the separator function and the automatic template recognition do not work.
- Template recognition can, however, be performed manually after loading via the function "Search matching classification templates" in the toolbar.

Use this feature to drag and drop TIFF or PDF files from the file system into the Inbox. Complete the following steps:

1. Select the documents you want to import from your file system.
2. Drag the selected documents via drag and drop into the user interface of the scan programme. The import process may take a while depending on the file size.
   a) If you press the "Shift" key on your keyboard at the same time, the file(s) will be added to the inbox and removed from the file system
3. The documents are displayed as individual files in the scan programme and can be processed consecutively.

12.15.2 Import Documents (Menu)

- Please note that in this case the separator function and the automatic template recognition do not work.
- Template recognition can, however, be performed manually after loading via the function "Search matching classification templates" in the toolbar.

Use this feature to drag and drop TIFF or PDF files from the file system into the Inbox.
To import, complete the following steps:

1. Select the "Import" function. To do this, you have the following options:
   a) Click "File - Import" in the menu or
   b) Enter this key command: CTRL+I
2. A dialog opens.
   a) Select the TIFF or PDF file on your file system.
   b) Then confirm your selection with "Open".
   c) The document is now loaded into the client.



Figure 12.24: Icon - Import Documents

12.16 Select / Highlight Multiple Pages

In a multi-page document, you can highlight multiple pages on which you want to execute inbox operations (such as deleting pages, moving pages, etc.).

1. You can select multiple pages using the CTRL key.
2. Once you have selected a page, the checkbox to the left of the page is enabled and the page is highlighted in blue.
3. The last page you select is highlighted in green.

12.17 Split Document in Two

- When you split a document in two or into separate pages, ecoDMS applies the classification of the original document. You can modify this if necessary.
- There are several ways to split a document:
  - Separate Documents with Barcode
  - Separate Documents with Separator Page
  - Split Documents Inside the Inbox

With this feature you can insert pages from a PDF or TIFF document separately or as a document.

1. Select the pages you want to split in the "Thumbnails". (Press and hold the "CTRL" key to select several documents).
2. Use the function "Split Document". To use the function, there are several options:
   a) Click the toolbar icon "Split Document" **or**
   b) Enter this shortcut: F7
3. The dialog shows the modified current document and the new document.
4. Confirm the process with "OK" or cancel it with "Cancel".
5. The divided pages are inserted in the last position in the client.
6. In order to classify and archive a document, save the changes first.
   a) Click the save icon.



Figure 12.25: Icon - Split Document

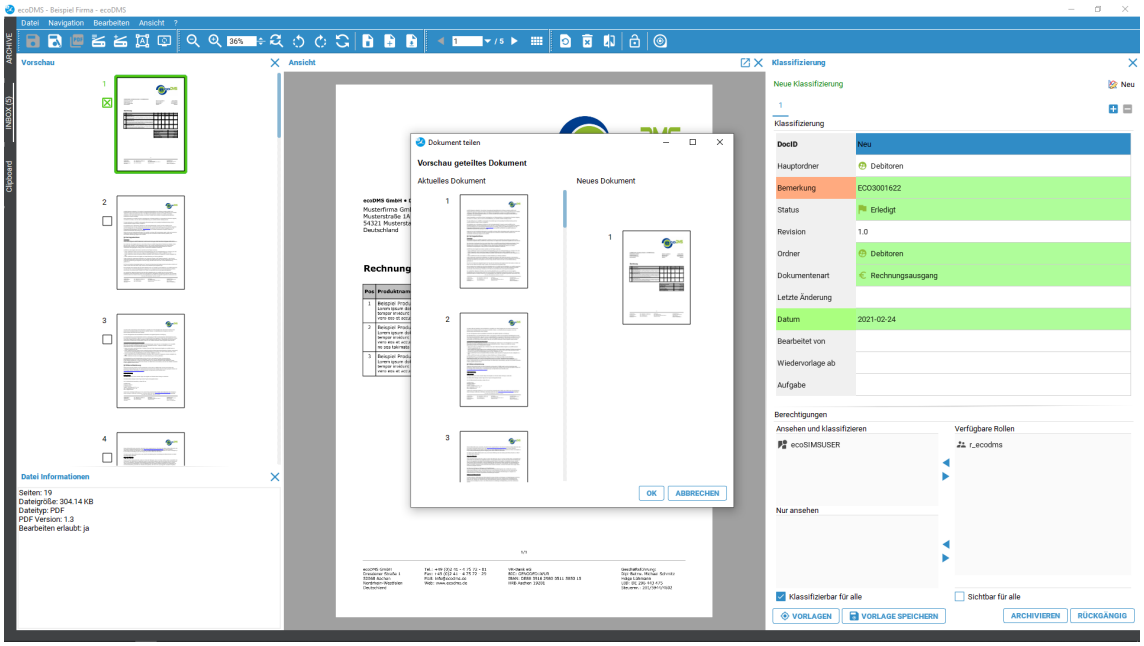


Figure 12.26: Inbox - Split Document

12.18 Split Document into Separate Pages

When you split a document in two or into separate pages, ecoDMS applies the classification of the original document. You can modify this if necessary.

To split multi-page documents into single pages and archive them in sequence to the document management system, use the "Split into single pages" feature.

1. Open a multi-page PDF in the inbox
2. Click the "Split into single pages" icon
3. Confirm the message "Do you want to split file into single pages?" with "Yes".
4. The file is separated and the pages are saved to the inbox as separate documents.



Figure 12.27: Icon - Split into Single Pages

12.19 Invert Page Order

Use this feature to invert the page order in a document. If you scan a document with the last page first, you can use it to correct the order.

1. Open a multi-page PDF in the inbox
2. Execute the "Invert Page Order" feature using one of the following options:
   a) Icon - Invert Page Order
   b) Menu - Edit - Invert Page Order
   c) Right-click a page - Invert Page order
   d) Keyboard shortcut: CTRL+Alt+N
3. Speichern Sie die Änderung ab



Figure 12.28: Icon - Invert Page Order

12.20 Move One or Multiple Pages

In a multi-page PDF, you can select one or multiple pages and move them to another position.

1. Press CTRL and select the pages you want to move.
2. Move the selection to another position.
   a) If, for example, you select pages 6, 10, and 20 and pull them to page 1, this is the new order: 1, 6, 10, 20, 2, 3, 4, 5, 7, ...

12.21 Unlock Documents

This feature is exclusively available to ecoDMS administrators.

You can only edit and classify documents if the server connection is stable and the documents are not checked out by another user. Otherwise the documents are locked in the inbox. If required, the administrator can unlock the documents. If the document is checked out by another user, ecoDMS displays the name of this user above the document preview in the inbox. Documents should only be unlocked following prior consultation. To unlock a document, complete the following steps:

1. Select the document.
2. Click the "Unlock Document" icon on the toolbar.



Figure 12.29: Icon - Unlock Document

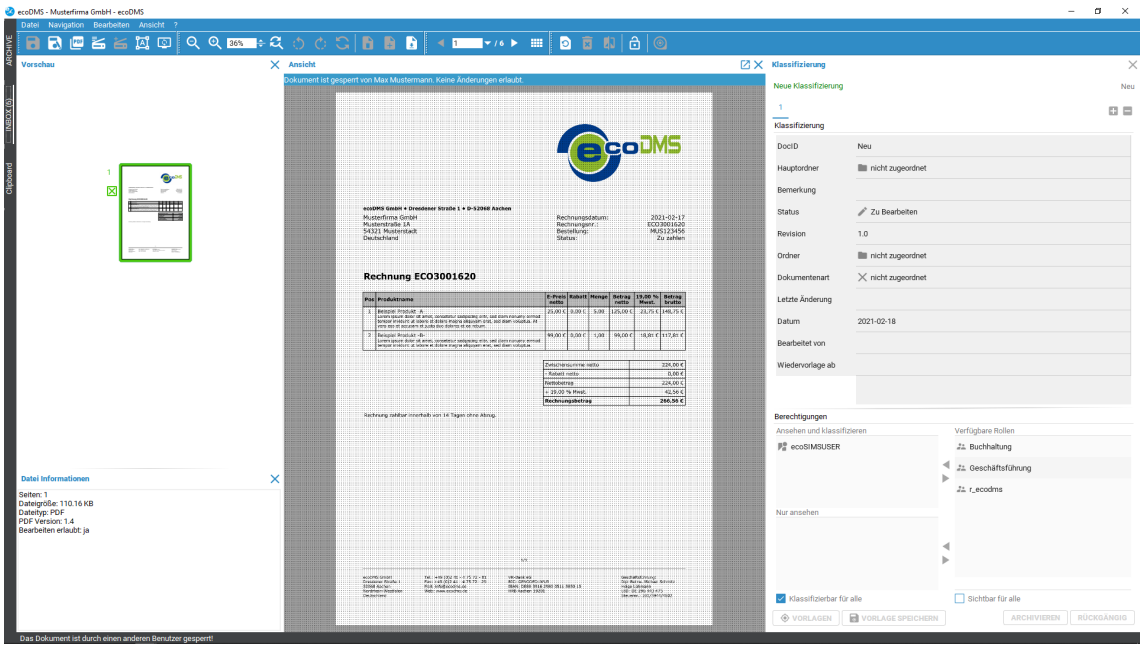


Figure 12.30: Document Locked By Another User (Inbox)

12.22 Edit Documents

You can use various functions to edit the documents requested via this application before they are archived.

12.22.1 Copy, Cut and Paste Pages

The Inbox provides several different editing functions. You can copy, cut and paste pages. Depending on the structure and type of a PDF file, the file can suppress these functions.

12.22.1.1 Cut

If a document includes multiple pages, selected pages can be cut and pasted in another position or document. To do so, complete the following steps:

1. Select the pages you want to cut in the "Thumbnails". (Press and hold the "CTRL" key to select several documents).
2. Use the function "Cut". To use the function, there are several options:
   a) Click the menu "Edit - Cut" **or**
   b) Right-click a selected page - "Cut" **or**
   c) Enter this shortcut: CTRL + X
3. The selection is cut and copied to the clipboard.
4. In order to classify and archive a document, save the changes first.
   a) Click the Save icon.



Figure 12.31: Icon - Cut

12.22.1.2 Paste

Pages that are cut and copied are automatically copied to the clipboard and can be inserted anywhere in this application.

1. Select the pages you want to cut in the "Thumbnails". (Press and hold the "CTRL" key to select several documents).
2. Use the function "Paste". To use the function, there are several options:
   a) Click the menu "Edit - Paste" **or**
   b) Right-click a selected page - "Paste" **or**
   c) Enter this shortcut: CTRL + V
3. The selection is pasted to the document.
4. In order to classify and archive a document, save the changes first.
   a) Click the save icon.



Figure 12.32: Icon - Paste

12.22.1.3 Copy

Pages that are copied are automatically copied to the clipboard and can be inserted anywhere in this application.

1. Select the pages you want to copy in the "Thumbnails". (Press and hold the "CTRL" key to select several documents).
2. Use the function "Copy". To use the function, there are several options:
   a) Click the menu "Edit - Copy" **or**
   b) Right-click a selected page - "Copy" **or**
   c) Enter this shortcut: CTRL + C
3. The selection is copied to the clipboard.
4. In order to classify and archive a document, save the changes first.
   a) Click the save icon.



Figure 12.33: Icon - Copy

12.22.2 Rotate Pages

If necessary, you can rotate the pages of a document.

12.22.2.1 Rotate Left

Use this tool to rotate selected page(s) 90 degrees to the left.

1. Select the pages you want to rotate in the "Thumbnails". (Press and hold the "CTRL" key to select several documents).
2. Use the function "Rotate Left". To use the function, there are several options:
   a) Click the menu "View - Rotate Left" **or**
   b) Right-click a selected page - "Rotate Left" **or**
   c) Click the toolbar icon "Rotate Left" **or**
   d) Enter this shortcut: CTRL + Shift + L
3. In order to classify and archive a document, save the changes first.
   a) Click the save icon.



Figure 12.34: Icon - Rotate Left

12.22.2.2 Rotate Right

Use this tool to rotate selected page(s) 90 degrees to the right.

1. Select the pages you want to rotate in the "Thumbnails". (Press and hold the "CTRL" key to select several documents).
2. Use the function "Rotate Right". To use the function, there are several options:
   a) Click the menu "View - Rotate Right" **or**
   b) Right-click a selected page - "Rotate Right" **or**
   c) Click the toolbar icon "Rotate Right" **or**
   d) Enter this shortcut: CTRL + Shift + R
3. In order to classify and archive a document, save the changes first.
   a) Click the save icon.

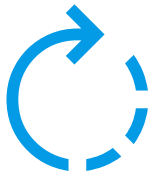


Figure 12.35: Icon - Rotate Right

12.22.2.3 Rotate 180 Degrees

Use this tool to rotate selected page(s) by 180 degrees.

1. Select the pages you want to rotate in the "Thumbnails". (Press and hold the "CTRL" key to select several documents).
2. Use the function "Rotate 180 degrees". To use the function, there are several options:
   a) Click the menu "View - Rotate 180 degrees" **or**
   b) Right-click a selected page - "Rotate 180 degrees" **or**
   c) Click the toolbar icon "Rotate 180 degrees" **or**
   d) Enter this shortcut: CTRL + R
3. In order to classify and archive a document, save the changes first.

a) Click the save icon.



Figure 12.36: Icon - Rotate 180 degrees

12.22.3 Export Pages

You can export selected pages of a TIFF document and save them in a file.

1. Select the pages you want to export in the "Thumbnails". (Press and hold the "CTRL" key to select several documents).
2. Use the function "Export Selected Page(s)". To use the function, there are several options:
   a) Click the menu "Edit - Export Selected Page(s)" **or**
   b) Right-click a selected page - "Export Selected Page(s)" **or**
   c) Click the toolbar icon "Export Selected Page(s)" **or**
   d) Enter this shortcut: CTRL + E
3. Select the path and enter a file name.
4. Confirm your entry with "Save" or cancel the process with "Cancel".



Figure 12.37: Icon - Export Selected Page(s)

12.22.4 Add Pages

You can add more pages to existing TIFF files.

1. Select the document.
2. Use the function "Add Page(s)". To use the function, there are several options:
   a) Click the menu "Edit - Add Page(s)" **or**
   b) Right-click a selected page - "Add Page(s)" **or**
   c) Click the toolbar icon "Add Page(s)" **or**
   d) Enter this shortcut: Ins

3. Select the path and choose the file.
4. Confirm your selection with "Open" or cancel the process with "Cancel".
5. In order to classify and archive a document, save the changes first.
    a) Click the save icon.



Figure 12.38: Icon - Add Selected Page(s)

12.22.5 Delete Pages

You can delete selected pages.

1. Select the pages you want to delete in the "Thumbnails". (Press and hold the "CTRL" key to select several documents).
2. Use the function "Delete Selected Page(s)". To use the function, there are several options:
    a) Click the menu "Edit - Delete Selected Page(s)" **or**
    b) Right-click a selected page - "Delete Selected Page(s)" **or**
    c) Click the toolbar icon "Delete Selected Page(s)" **or**
    d) Enter this shortcut: Del
3. Confirm the message with "Yes" or cancel the process with "No".
4. In order to classify and archive a document, save the changes first.
    a) Click the save icon.



Figure 12.39: Icon - Delete Selected Page(s)

12.22.6 Move Pages

You can change the order of pages within a document. To move page(s), complete the following steps:

1. Select the pages you want to move in the "Thumbnails". (Press and hold the "CTRL" key to select several documents).

2. Move the page(s) by dragging them to the new position.
3. In order to classify and archive a document, save the changes first.
    a) Click the save icon.

12.22.7 Swap Pages

You can change the order of pages within a document. To swap the position of page(s), complete the following steps:

1. Select the pages you want to swap in the "Thumbnails". (Press and hold the "CTRL" key to select several documents).
2. Move the page onto another page.
3. When the two pages touch, two arrows appear which signal and execute the swap.
4. In order to classify and archive a document, save the changes first.
    a) Click the save icon.

12.22.8 Zoom Pages / View

The software includes various zoom functions for page display.

12.22.8.1 Zoom Out

The software includes various zoom functions for page display. To zoom out, complete the following steps:

1. Select the page which you want to view in the "Thumbnails".
2. Use the function "Zoom Out". To use the function, there are several options:
    a) Click the menu "View - Zoom Out" **or**
    b) Click the toolbar icon "Zoom Out" **or**
    c) Enter a percentage value for the view in the spinbox **or**
    d) Click the bottom arrow in spinbox **or**
    e) Enter this shortcut: Alt + -



Figure 12.40: Icon - Zoom Out

12.22.8.2 Zoom In

The software includes various zoom functions for page display. To zoom in, complete the following steps:

1. Select the page which you want to view in the "Thumbnails".
2. Use the function "Zoom In". To use the function, there are several options:
   a) Click the menu "View - Zoom In" **or**
   b) Click the toolbar icon "Zoom In" **or**
   c) Enter a percentage value for the view in the spinbox **or**
   d) Click the top arrow in spinbox **or**
   e) Press the right mouse button and select the area which you want to zoom in in the "view" window **or**
   f) Enter this shortcut: Alt + +



Figure 12.41: Icon - Zoom In

12.22.8.3 Fit

The software includes various zoom functions for the display of pages. To fit in, complete the following steps:

1. Select the page which you want to view in the "Thumbnails".
2. Use the function "Fit". To use the function, there are several options:
   a) Click the menu "View - Fit" **or**
   b) Click the toolbar icon "Fit" **or**
   c) Double click on the page in the "View" window **or**
   d) Enter this shortcut: Strg + Z



Figure 12.42: Icon - Fit

12.22.9 Select Pages

You have various options to select or mark the pages of a document.

12.22.9.1 Select All Pages

This feature selects all pages of the displayed document simultaneously.

1. Click into the "View".
2. Use the function "Select All Pages". To use the function, there are several options:
    a) Click the menu "Edit - Select All Pages" **or**
    b) Right click on a page - "Select All Pages" **or**
    c) Enter this shortcut: CTRL + Alt + A

12.22.9.2 Select Even Pages

With this feature you can select all pages with even numbers in a document.

1. Click into the "View".
2. Use the function "Select All Pages". To use the function, there are several options:
    a) Click the menu "Edit - Select Even Pages" **or**
    b) Right click on a page - "Select Even Pages" **or**
    c) Enter this shortcut: CTRL + Alt + G

12.22.9.3 Select Odd Pages

With this feature you can select all pages with odd numbers in a document.

1. Click into the "View".
2. Use the function "Select Odd Pages". To use the function, there are several options:
    a) Click the menu "Edit - Select Odd Pages" **or**
    b) Right click on a page - "Select Odd Pages" **or**
    c) Enter this shortcut: CTRL + Alt + U

12.22.9.4 Undo Selection

This feature can undo the selection of pages in a document.

1. Click into the "View".
2. Use the function "Undo Selection". To use the function, there are several options:
    a) Click the menu "Edit - Undo Selection" **or**
    b) Right click on a page - "Undo Selections" **or**
    c) Enter this shortcut: CTRL + Shift + A

12.22.9.5 Reverse Selection

All pages are marked, except the one(s) you have already selected.

1. Click into the "View".
2. Use the function "Reverse Selection". To use the function, there are several options:
   a) Click the menu "Edit - Reverse Selection" **or**
   b) Right click on a page - "Reverse Selections" **or**
   c) Enter this shortcut: CTRL + Shift + U

12.22.9.6 Next Page

With this feature the next page of the current document is displayed in the "View" window.

1. Click into the "View".
2. Use the function "Next Page". To use the function, there are several options:
   a) Click the menu "Navigation - Next Page" **or**
   b) Right click on a page - "Next Page" **or**
   c) Enter this shortcut: CTRL + Shift + Arrow down

12.22.9.7 Previous Page

With this feature the previous page of the current document is displayed in the "View" window.

1. Click into the "View".
2. Use the function "Next Page". To use the function, there are several options:
   a) Click the menu "Navigation - Next Page" **or**
   b) Right click on a page - "Next Page" **or**
   c) Enter this shortcut: CTRL + Shift + Arrow down

12.23 Close Documents

You can close documents.

- Closed documents are not removed from the server.
- Every time the programme launches, all available, scanned documents are automatically retrieved.
- With a click on the icon "Request Documents" all available, scanned documents are automatically reloaded.

You have various options for closing a document.

1. Use the function "Close". To use the function, there are several options:
   a) Click the menu "File - Close" **or**
   b) Enter this shortcut: CTRL + Alt + C

12.23.1 Close All Documents

If you do not want to exit the application but want to close all opened documents, you have the following options:

- Closed documents are not removed from the server.
- Every time the programme launches, all available, scanned documents are automatically retrieved.
- With a click on the icon "Request Documents" all available, scanned documents are automatically reloaded.

1. Use the function "Close". To use the function, there are several options:
   a) Click the menu "File - Close All" **or**
   b) Enter this shortcut: CTRL + Shift + C

12.24 Delete Documents

When the documents are displayed in this scan programme, they have not yet been stored in ecoDMS. Therefore, documents that are not required can be deleted again after scanning. You cannot undo this operation.

12.24.1 Delete Document (Overview)

For more information, please refer to the section "Display Overview of All Scans".

12.24.2 Delete Document (User)

Documents that should not be archived can be removed from the server. To do so, complete the following steps:

1. Select the document.
   a) Click the icon "Delete Document from Server" on the toolbar or
   b) Press "F8" on your keyboard.
2. The system will ask you to confirm the delete process.
   a) The document is deleted irrevocably if you confirm the process with "Yes".
   b) Click "No" to abort the process.



Figure 12.43: Icon - Delete Document from Server

12.24.3 Delete All Documents (Admin)

For security reasons, this feature is only available to users who have been assigned the system roles "ecoSIMSAdmin", "ecoSIMSCLASSIFY" and "ecoSIMSALLDOCS". Otherwise the function is not visible.

To remove all documents from the scan programme, you require special system permissions in addition to the standard permissions. To delete all documents, complete the following steps:

1. Select "Edit -> Delete All Documents..." from the menu.
2. The system will ask you to confirm the delete process.
    a) All available documents in the scan programme are deleted irrevocably if you confirm the process with "Yes".
    b) Click "No" to abort the process.

12.25 Storage Functions

There are various functions for saving documents and/or changes. By default, this part of the application is provided for archiving of scanned documents. In addition to the archiving function, the software also includes other functions to save documents. These can be used in parts independently of the archive function.

12.25.1 Save Changes

The Classification dialog is enabled if you make changes to a scanned document (for example: Rotate Pages, Delete Pages...). To unlock the document for Classification, the changes must be saved first. Complete the following steps:

1. Make the required modifications to the document.
2. Use the function "Save". To use the function, there are several options:
    a) Click the menu "File - Save" **or**
    b) Click the toolbar icon "Save" **or**
    c) Enter this shortcut: CTRL + S



Figure 12.44: Icon - Save

12.25.2 Save as PDF

This feature requires a licence of the ecoDMS full version but can be tested during the demo time. In the Free4Three version this feature is not enabled.

The scanned documents can be saved as a PDF file locally, on a data carrier or in the file system.

1. Select the document.
2. Use the function "Save as PDF". To use the function, there are several options:
    a) Click the menu "File - Save as PDF" **or**
    b) Click the toolbar icon "Save as PDF"
3. Use the file name and the destination to specify the PDF in the dialog that opens.
4. You can also save the file as a searchable PDF.
    a) To do so, enable the command "Save as searchable PDF".
        i. This feature is only included in the ecoDMS full version.
5. Click "Save" to save the PDF or "Cancel" to cancel the process.



Figure 12.45: Icon - Save as PDF

12.25.3 Save As

The scanned documents can be saved on a data carrier or in the file system.

1. Select the document.
2. Use the function "Save as". To use the function, there are several options:
    a) Click the menu "File - Save as" **or**
    b) Click the toolbar icon "Save as"
3. Use the file name and the destination to specify the file in the dialog that opens.
4. Click "Save" to save the file or "Cancel" to cancel the process.



Figure 12.46: Icon - Save as PDF

13 Classification

Via Classification you can assign, for example, the virtual destination folder in ecoDMS, the document type, the status, the responsibilities and many more archiving details to each file you archive. These details allow documents to be systematically filed and easily retrieved through keyword search as an alternative and/or in addition to the full-text search. The following chapter describes various methods and options for document classification.

- Viewing and using this feature requires specific system permissions.
- A document may only be classified and versioned if the user has a permission to classify the specified document.
- Administrators can define the appropriate classification attributes and mandatory fields for each document type via the settings dialog. The display and order of the attributes therefore depends on the settings.
- You can install server and client in different languages. The view of the classification attributes and messages depends on the language you have selected for the ecoDMS server component.
- The preview in the classification dialog is only displayed for PDFs and files that are archived via the ecoDMS Plugins or the PDF/A printer.

13.1 Classification dialog

You have several methods and options to classify documents. The Classification dialog is very important. This includes all stored Classification Information. For almost any archiving the Classification Dialog Box is relevant.

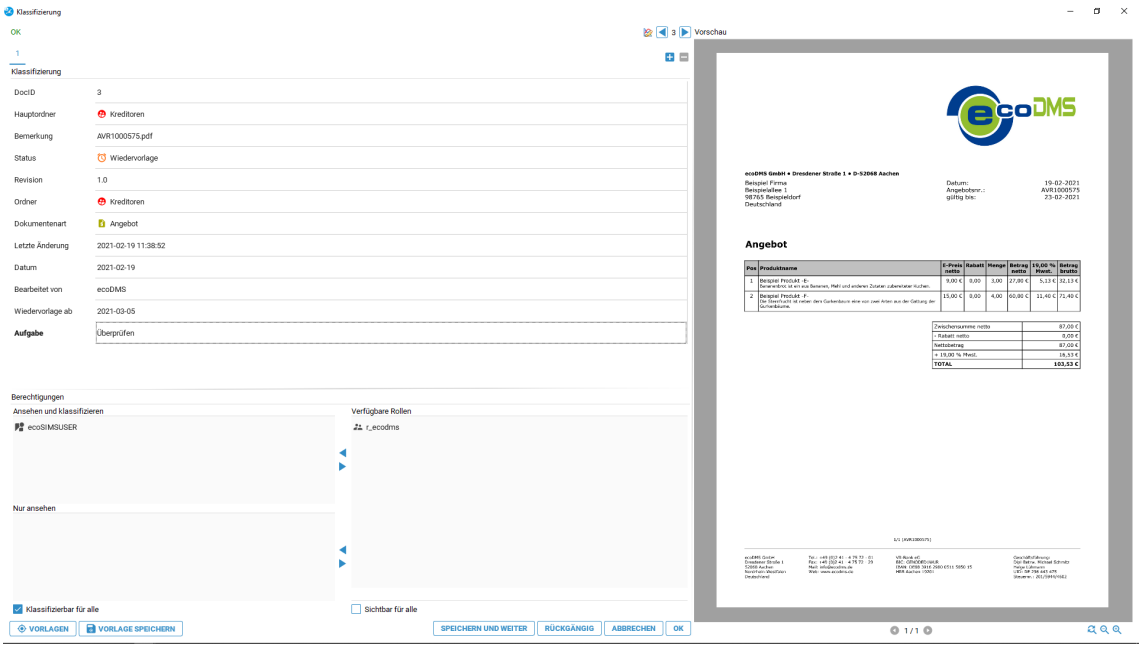


Figure 13.1: Classification dialog with Preview

13.1.1 Open Classification dialog

To open the classification dialog in ecoDMS, complete the following steps:

1. Select the documents
    a) Press and hold the CTRL key to select several documents at once
2. Select the "Classify" function using one of the following methods:
    a) **Card view:** Double-click in the document information area (1st tab on the card)
    b) **Table view:** Right-click one of the selected documents in the table -> Classify
    c) **Toolbar:** Click the Classify icon on the toolbar.
    d) **Keyboard shortcut:** CTRL + K



Figure 13.2: Icon - Classify

13.1.2 Change order of Attributes

Administrators can define the appropriate classification attributes and mandatory fields for each document type via the settings dialog. The display and order of the attributes therefore depends on the settings. Please refer to the section "Settings -> Document Types & Retention Periods" for more details.

13.1.3 Show/Hide Attributes

Administrators can define the appropriate classification attributes and mandatory fields for each document type via the settings dialog. The display and order of the attributes therefore depends on the settings. Please refer to the section "Settings -> Document Types & Retention Periods" for more details.

13.1.4 Undo

The "Undo" button reverts all previously made classification settings and returns the classification of the selected document to its last saved state. If, for example, ecoDMS recognises a "classification template", you can reset the automatic Classification by clicking the Undo button for the specific document.

13.1.5 OK

To save the classification, click "OK"

13.1.6 Save and Continue

If you have opened several documents for classification, click the "Save and Continue" button to save the change(s) made to the document and to edit the next one.

13.1.7 Skip Between Documents

If you have selected several documents for simple classification, you can use the keys (in the upper area of the classification window) to skip between documents.

13.1.8 Cancel - Message

If you have not saved your changes to the classification, a message displays. Click "Yes" to save and "No" to discard the changes.

13.2 Classify

There are various classification attributes available for the Classification (assignment / assignment of meta data) of archived documents. A distinction is made between "standard attributes" that are integrated in the system and "user-defined attributes". The following chapters explain the "Standard Attributes".

13.2.1 DocID

DocID stands for "Document Identification Number". A sequential document identification number is automatically allocated to each archived document. The user cannot edit or enter the DocID manually.

13.2.2 Main Folder

The main folders are determined by the folder structure and are allocated automatically. The user cannot create the main folder manually.

- If you have not yet selected a folder, the entry "Not assigned" is displayed. As soon as you have selected a folder from the folder structure, the system automatically recognises and enters the associated main folder.
- For more information on this topic, please refer to the chapter on "Settings - Folder Structure".

13.2.3 Folder

- Tip: If the folder window is open, you can jump directly to the required folder by entering the first letters or numbers of the folder name (also see Folder Search).
- Information: A user can only see the folders, documents and classifications for which the user has a permission.

Folders are determined by the folder structure and can either be selected manually or automatically via classification templates and/or via the "folder recognition". The folder determines the virtual file destination in ecoDMS. If you have not yet selected a folder, the entry "Not assigned" is displayed. You can also create folders directly through the Classification dialog or the folder structure if you have the according permission. In the following you will learn how to select a folder:

13.2.3.1 Classification dialog

1. Open the Classification dialog for the document(s).
2. Select the entry field for the "Folder" attribute.
3. Open the Folder Structure:
   a) Either by double-clicking the entry field **or**
   b) By entering the letter "e" (edit).
4. Select the folder
   a) by double-clicking it in the Folder Structure **or**
   b) by entering the folder name, the key, or deposited keywords into the Folder Structure.
      i. In this case an input window opens.
      ii. ecoDMS selects the folder you searched for. Use the "F3" key to continue the search.
      iii. Confirm your entry selection with the "Enter" key.

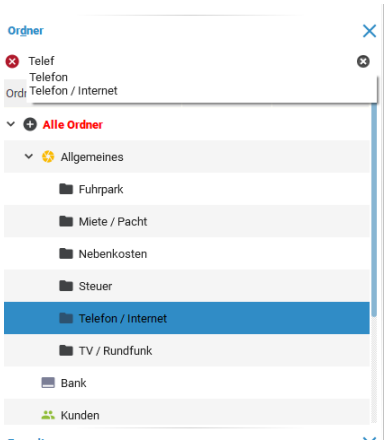


Figure 13.3: Searching for Folders

13.2.3.1.1 Copy & Paste Text If a document preview is displayed in the Classification dialog, you can select the preview contents and use it for classification. In the Inbox this information can be copied from the "View" window. To do so, complete the following steps:

1. In the Classification dialog, select the entry field for the "Folder" attribute.
2. Press the "CTRL" key and Right-click the area where you want to paste the content, in the "preview".
3. If you enter the "Folder" attribute, the Folder Structure opens. The copied content is recorded as a search term for the folder.
4. Select the folder and confirm your selection with "Enter".

- The preview in the classification dialog is only displayed for PDFs and files that are archived via the ecoDMS Plugins or the PDF/A printer.

13.2.3.2 Table View (ecoDMS)

- The table is the outdated document view in ecoDMS.
- There is a new, modern document view which clearly displays all information and functions in form of cards.

1. Select the document in the ecoDMS table.
2. Select the "Folder" attribute.
3. Open the Folder Structure:
   a) Either by double-clicking the entry field **or**

b) By entering the letter "e" (edit).

4. Select the folder
   a) by double-clicking it in the Folder Structure or
   b) by entering the folder name, the key, or deposited keywords into the Folder Structure.
      i. In this case an input window opens.
      ii. ecoDMS selects the folder you searched for. Use the "F3" key to continue the search.
      iii. Confirm your entry and selection with the "Enter" key.

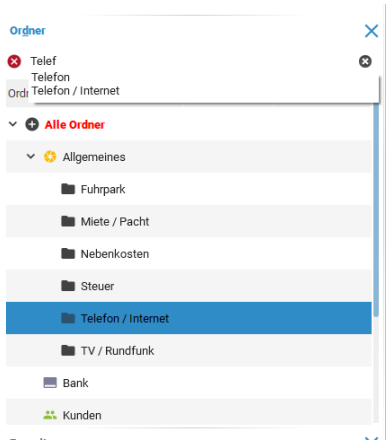


Figure 13.4: Searching for Folders

13.2.3.3 Drag & Drop Classification in ecoDMS

1. Press and hold the CTRL key to select several documents at once
2. Select the documents in ecoDMS
3. Grab your selection in the area of a DocID
4. Now drag it onto a folder in the folder tree

13.2.4 Comment

The "Comment" box is a free text box which can be filled with any content. You can either enter the comment manually or ecoDMS can automatically enter the comment via the classification templates, which can be recognised from the file name. In the following you will learn how to enter the attribute.

13.2.4.1 Classification dialog

1. Open the Classification dialog for the document(s).
2. Select the entry field for the "Comment" attribute.
   a) Either by double-clicking **or**
   b) By entering the letter "e" (edit).

3. Enter the comment.

13.2.4.1.1 Copy & Paste Text If a document preview is displayed in the Classification dialog, you can select the preview contents and use it for classification. In the Inbox this information can be copied from the "View" window. To do so, complete the following steps:

1. In the Classification dialog, select the entry field for the "Comment" attribute.
2. You now have the following options to apply the text from the preview
   a) CTRL + hold right mouse button over text = text is inserted and appended to any existing text
   b) CTRL + SHIFT + hold right mouse button held over text = text is inserted and overwrites any existing text

- The preview in the classification dialog is only displayed for PDFs and files that are archived via the ecoDMS Plugins or the PDF/A printer.

13.2.4.2 Table View (ecoDMS)

- The table is the outdated document view in ecoDMS.
- There is a new, modern document view which clearly displays all information and functions in form of cards.

1. Select the document in the ecoDMS table.
2. Select the entry field for the "Comment" attribute.
   a) Either by double-clicking or
   b) By entering the letter "e" (edit).
3. Enter the comment.

13.2.5 Status

A status provides information about the processing status of a document. As a default, 3 statuses are deposited in ecoDMS:

1. Done
2. Resubmission (please read the chapter "Resubmissions")
3. ToDo

These can be renamed or enhanced by the administrator, but not deleted. You can either assign a status manually or ecoDMS recognises it automatically through the classification templates. In the following you will learn how to manually select the Status:

13.2.5.1 Classification dialog

1. Open the Classification dialog for the document(s).
2. Select the entry field for the Status attribute.
   a) Either by double-clicking **or**
   b) By entering the letter "e" (edit).
3. Select the Status.
   a) If you select Resubmission, the calendar opens to enter the resubmission date.
   b) Select the date in the calendar.
      i. Use the arrow keys (left, right) to switch between the months.
      ii. You can change the month and the year using the navigation in the calendar ribbon.
      iii. Click "Today" to set the current day.
      iv. You can also enter the date directly. The first number is entered in the calendar.
   c) Confirm your entry and selection with "OK".

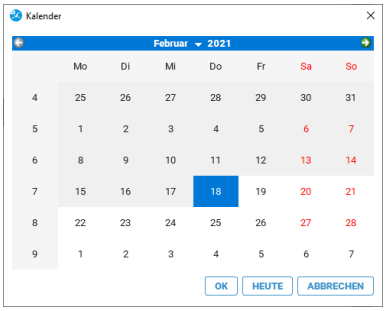


Figure 13.5: Calendar - Select Date

13.2.5.2 Table View (ecoDMS)

- The table is the outdated document view in ecoDMS.
- There is a new, modern document view which clearly displays all information and functions in form of cards.

1. Select the document in the ecoDMS table.
2. Select the entry field for the Status attribute.
   a) Either by double-clicking **or**
   b) By entering the letter "e" (edit).
3. Select the Status.
   a) If you select Resubmission, the calendar opens to enter the resubmission date.

b) Select the date in the calendar.

i. Use the arrow keys (left, right) to switch between the months.

ii. You can change the month and the year using the navigation in the calendar ribbon.

iii. Click "Today" to set the current day.

iv. You can also enter the date directly. The first number is entered in the calendar.

4. Confirm your entry and selection with "OK".

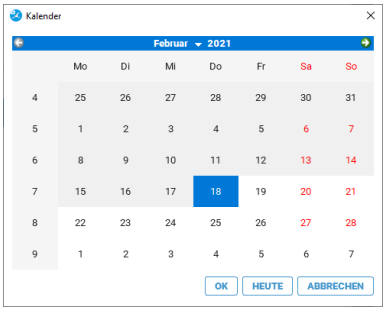


Figure 13.6: Calendar - Select Date

13.2.5.3 Drag & Drop Classification in ecoDMS

1. Press and hold the CTRL key to select several documents at once.
2. Select the documents in ecoDMS.
3. Grab your selection in the area of a DocID.
4. Now drag it onto a status.
5. If you select Resubmission, the calendar opens to enter the resubmission date.

a) Select the date in the calendar.

i. Use the arrow keys (left, right) to switch between the months.

ii. You can change the month and the year using the navigation in the calendar ribbon.

iii. Click "Today" to set the current day.

iv. You can also enter the date directly. The first number is entered in the calendar.

6. Confirm your entry and selection with "OK".

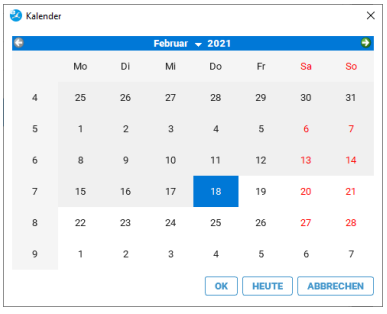


Figure 13.7: Calendar - Select Date

13.2.6 Revision

The revision is automatically assigned by the system. The revision increments by one with each change to the classification of a document. At the same time an entry is made in the document history. The revision number shows how often a file was changed within the classification after archiving. The user cannot change the DocID. The revision only refers to changes within the Classification. ecoDMS records any change to the classification attributes of a document in a history. All processing and archiving steps are thus automatically logged and can be reproduced at any time.

13.2.7 Document Type

When assigning documents, the type of document (e.g. incoming invoices, outgoing invoices, agreement, offer is specified in Document Type. We recommend you select the Document Type when classifying each document you archive. This makes the handling and the retrieval of documents much easier. You can either assign a status manually or ecoDMS recognises it automatically through the "classification templates". If you have not yet selected a Document Type, the entry "Not assigned" is displayed. In the following you will learn how to manually select the Document Type:

13.2.7.1 Classification dialog

1. Open the Classification dialog for the document(s).
2. Select the entry field for the Document Type attribute.
    a) Either by double-clicking **or**
    b) By entering the letter "e" (edit).
3. Select the Document Type.

13.2.7.2 Table View (ecoDMS)

- The table is the outdated document view in ecoDMS.
- There is a new, modern document view which clearly displays all information and functions in form of cards.

1. Select the document in the ecoDMS table.
2. Select the entry field for the Document Type attribute.
    a) Either by double-clicking **or**
    b) By entering the letter "e" (edit).
3. Select the Document Type.

13.2.8 Last Change

If a change is made to the classification after the archiving process, the date and time of the last change to the document is displayed here. The classification attribute is automatically allocated and cannot be entered manually by the user.

13.2.9 Date

The date is automatically assigned when archiving, but it can be changed if necessary. We recommend you store the actual postal date of receipt of the document as date in ecoDMS. When searching for documents, the actual date can be included in the search. You can either assign a status manually or ecoDMS recognises it automatically. In the following you will learn how to manually select the "date":

13.2.9.1 Classification dialog

1. Open the Classification dialog for the document(s).
2. Select the entry field for the "Date" attribute.
   a) Either by double-clicking **or**
   b) By entering the letter "e" (edit).
3. The calendar dialog opens. Select the date in the calendar.
   a) Use the arrow keys (left, right) to switch between the months.
   b) You can change the month and the year using the navigation in the calendar ribbon.
   c) Click "Today" to set the current day.
   d) You can also enter the date directly. The first number is entered in the calendar.
4. Confirm your entry and selection with "OK".

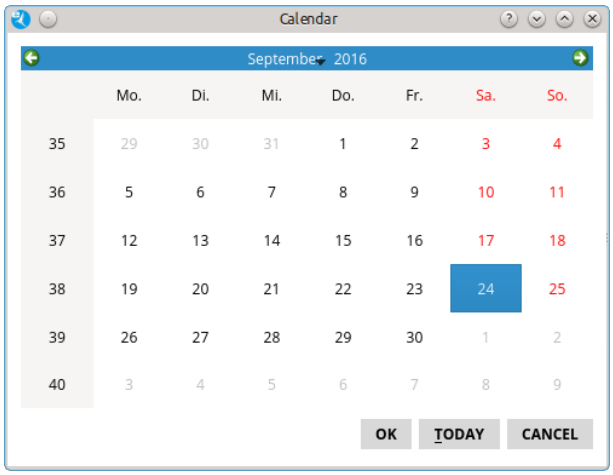


Figure 13.8: Calendar - Select Date

13.2.9.1.1 Copy & Paste Text If a document preview is displayed in the Classification dialog, you can select the preview contents and use it for classification. In the Inbox this information can be copied from the "View" window. To do so, complete the following steps:

1. In the Classification dialog, select the entry field for the "Date" attribute.
2. Press the "CTRL" key and Right-click the area where you want to paste the content, in the "preview".

ecoDMS recognises the following date formats:

1. yyyy.MM.dd
2. dd.MM.yyyy
3. dd.MM.yy
4. dd. MMM yyyy
5. dd. MMMM yyyy
6. dd MM yyyy
7. dd MMMM yyyy
8. dd.MMyyyy
9. ddMMyyyy
10. ddMM.yyyy

- The preview in the classification dialog is only displayed for PDFs and files that are archived via the ecoDMS Plugins or the PDF/A printer.

13.2.9.2 Table View (ecoDMS)

- The table is the outdated document view in ecoDMS.
- There is a new, modern document view which clearly displays all information and functions in form of cards.

1. Select the document in the ecoDMS table.
2. Select the entry field for the "Date" attribute.
   a) Either by double-clicking **or**
   b) By entering the letter "e" (edit).

3. The calendar dialog opens. Select the date in the calendar.
    a) Use the arrow keys (left, right) to switch between the months.
    b) You can change the month and the year using the navigation in the calendar ribbon.
    c) Click "Today" to set the current day.
    d) You can also enter the date directly. The first number is entered in the calendar.
4. Confirm your entry and selection with "OK".

13.3 Permissions

To ensure that the documents can only be viewed and edited by authorised persons, you can assign individual permissions to each document and each folder in ecoDMS. This ensures confidentiality of the documents. You can assign permissions in the Classification dialog.

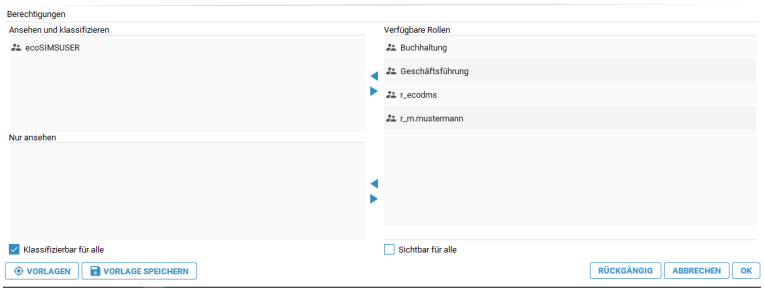


Figure 13.9: Classification dialog - Permissions

13.3.1 Assign Permissions

You assign permissions via drag & drop. The window on the right displays all available users. These can be dragged to the two boxes on the left. This specifies who may view a document and who may also classify the document.

- Please note that at least one user must be entered in the "View and Classify" box.

13.3.1.1 View and Classify

This window contains all "roles" (users, groups) that are allowed to view and classify the document after the Classification is saved. Please note that at least one user or role (group) must be assigned in this permission window. To assign "roles" to this window, complete the following steps:

1. Select the "roles" (users, groups) in the "Available Roles" window.
    a) If you hold the "CTRL" key, you can select several roles simultaneously.
2. Drag and drop the "roles" into the "View and Classify" window.
    a) Alternatively, you can assign the "roles" to the window with the upper arrow icon (arrow right).

13.3.1.2 View Only

This window contains all "roles" (users, groups) that are only allowed to view but not classify the document after the Classification is saved. To assign "roles" to this window, complete the following steps:

1. Select the "roles" (users, groups) in the "Available Roles" window.
    a) If you hold the "CTRL" key, you can select several roles simultaneously.
2. Drag and drop the "roles" into the "View Only" window.
    a) Alternatively, you can assign the "roles" to the window with the lower arrow icon (arrow left).

13.3.1.3 For Classification by All Users

If the "For Classification by All Users" function is enabled, the document can be viewed and classified by all users after the classification has been saved. Exception: The associated folder limits access with more permissions:

- The "ecoSIMSUSER" role is entered by the system in the "View and Classify" window when the command is enabled.

13.3.1.4 For View by All Users

If you enable the "For View by All Users" function, all users can view the document after you save the classification. Exception: The associated folder limits access with more permissions.

- The "ecoSIMSUSER" role is entered by the system in the "View Only" window when the command is enabled.

13.3.2 Remove Permissions

To remove permissions, complete the following steps:

13.3.2.1 View and Classify

This window contains all "roles" (users, groups) that are allowed to view and classify the document after the Classification is saved. Please note that at least one user or role (group) must be assigned in this permission window. To remove a profile from the "Roles" window, complete the following steps:

1. Select the "roles" (users, groups) in the "View and Classify" window.
    a) If you hold the "CTRL" key, you can select several roles simultaneously.
2. Drag and drop the "roles" into the "Available Roles" window.
    a) Alternatively, you can assign the "roles" to the window with the upper arrow icon (arrow right).

13.3.2.2 View Only

This window contains all "roles" (users, groups) that are only allowed to view but not classify the document after the Classification is saved. To remove "roles" from this window, complete the following steps:

1. Select the "roles" (users, groups) in the "View Only" window.
    a) If you hold the "CTRL" key, you can select several roles simultaneously.
2. Drag and drop the "roles" into the "Available Roles" window.
    a) Alternatively, you can assign the "roles" to the window with the lower arrow icon (arrow right).

13.3.2.3 For Classify by All Users

If the "For Classify by All Users" command is disabled, the document cannot be viewed and classified by all users after the Classification is saved (please note the folder permission):

- The "ecoSIMSUSER" role is removed from the system in the "View and Classify" window when the command is disabled.

13.3.2.4 For View by All Users

If the "For View by All Users" command is disabled, the document cannot be viewed by all users after the Classification is saved (please note the folder permission).

- The "ecoSIMSUSER" role is removed from the system in the "View Only" window when the command is disabled.

13.4 Preview

- For mass classification, there is no preview window in the Classification dialog.
- This feature requires a licence of the ecoDMS full version but can be tested during the demo time. In the Free4Three version this feature is not enabled.

When archiving via the Office Plugins or the PDF/A Printer and when generally saving PDF files, a preview is also displayed inside the Classification dialog. From this preview window, you can use text passages and date fields for the classification.

13.5 Classification Detection

- Classification detection must be enabled in the ecoDMS settings.
- Classification detections are highlighted in a purple color.
- For further details, please refer to the chapter 7.2.5

With the "Classification Detection" feature in ecoDMS, documents can be automatically classified based on their similarity to already archived and classified documents. If this detection is enabled in the ecoDMS settings, the system first checks whether a suitable classification is found for each new document which has to be archived. You can also customize the proposal if required.

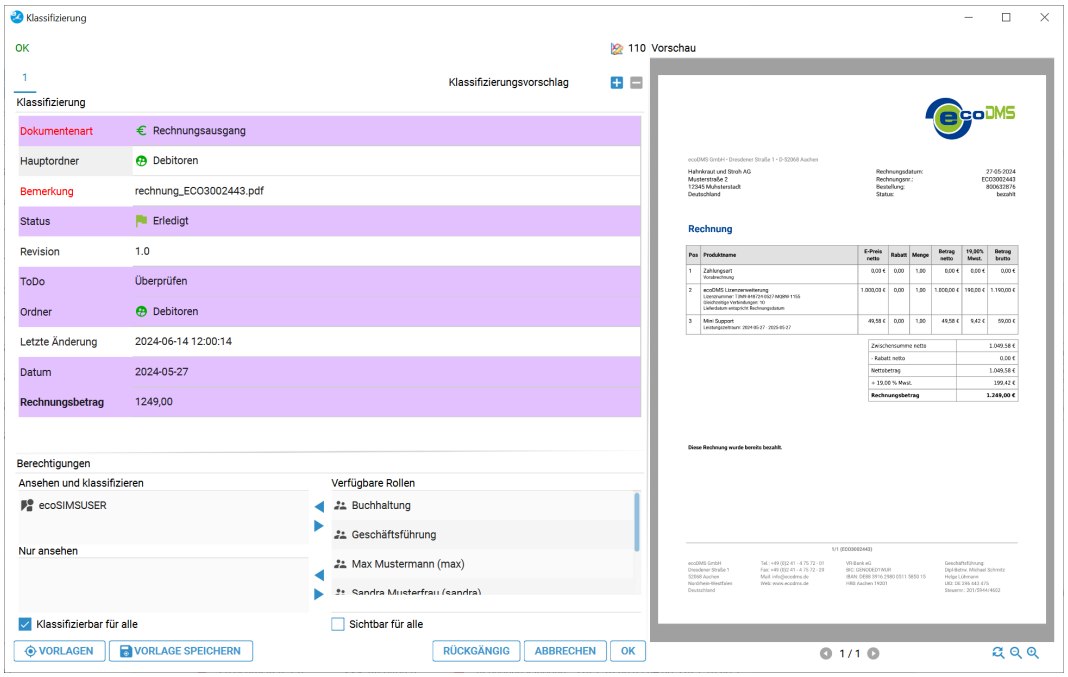


Figure 13.10: Classification Detection for Archiving via ecoDMS Client (Example)

13.6 Mass Classification

When mass classifying, you can classify several documents simultaneously with the same information. There are several ways to open this feature. When using the mass classify function, only fill in the boxes which you want to apply to all the documents you want to classify. All other classification attributes are not overwritten.

13.6.1 Massenklassifizierung öffnen

1. Select the documents.
    a) Press and hold the CTRL key to select several documents at once.
2. Wählen Sie nun die Funktion "Massenklassifizieren" aus. Hierzu können Sie eine der folgenden Aufrufe nutzen:
    a) **Table view:** Right-click one of the selected documents in der Tabelle -> Massenklassifizieren
    b) **Toolbar:** Das Massenklassifizieren-Icon in der Symbolleiste anklicken
    c) **Keyboard shortcut:** CTRL + Shift + K



Figure 13.11: Icon - Massenklassifizieren

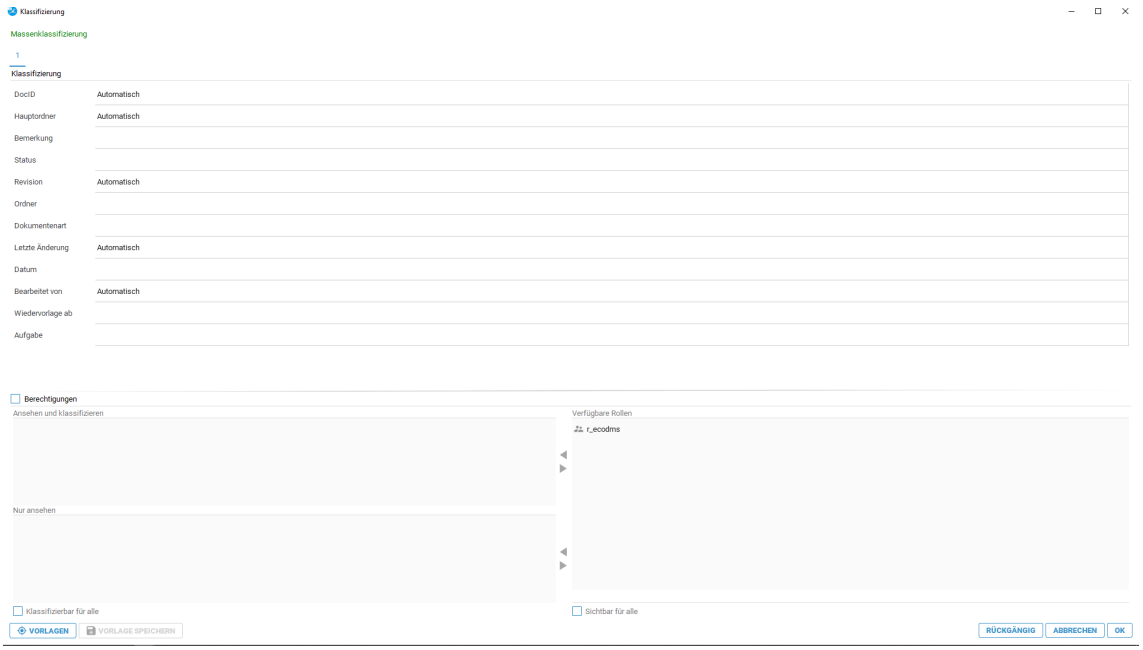


Figure 13.12: Massenklassifizierung (hier: blanko)

13.6.2 Permissions in Mass Classification

Through mass classification you can align the permissions of the selected documents. This is an optional process. The permissions can also be omitted during mass classification. However, the user will always require a permission to classify the selected documents.

1. Start Mass Classification.
2. Activate the "Permission" by selecting the box.
3. Assign permissions as usual.

13.7 Multiple Classification

Multiple classification allows a document to be classified several times (internal linking) without repeatedly saving it to the archive. This allows you to deposit different classifications for one document. The document is saved once in the database, but it can be assigned any number of classifications in the user interface. For example, you can assign a file to various folders in ecoDMS. The DocID for the document is then referenced several times in ecoDMS due to the different links.

- To assign additional classifications to a document, you must first create the document on separate tabs. You can edit and remove the tabs, if required, as long as you did not confirm the classification with "Save" or "OK".
- You can only edit and delete individual tabs until ecoDMS has saved and completed the classification.
- Editing a classification is still possible after saving. To do this, you require a permission for this classification entry.
- To delete such an entry, carry out the standard ecoDMS deletion process (delete function).



Figure 13.13: Icon - Classification

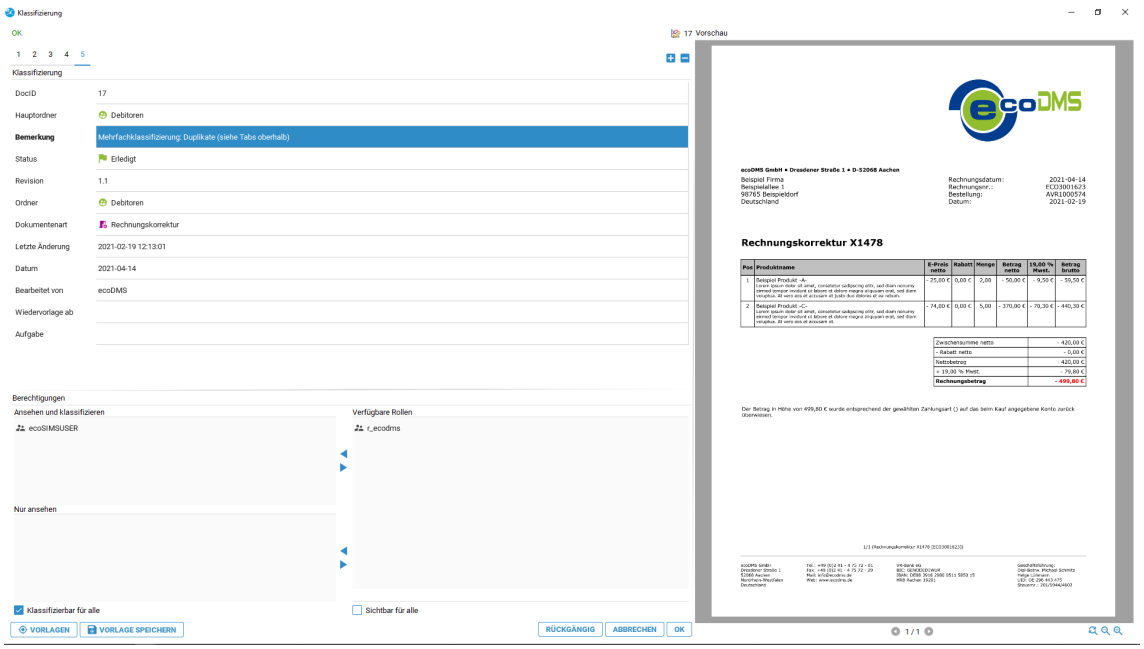


Figure 13.14: Multiple Classification

13.7.1 Multiple Classification / Add Tab

To assign further classifications to a document, complete the following steps:

1. Select document in the ecoDMS table.
2. Select the "Classify" function. You have following options:
   a) Right-click one of the selected documents - Classify **or**
   b) Click the "Classify" icon in toolbar **or**

c) Enter this shortcut: CTRL + K

3. Enter the Classification Information (if not yet available)
4. To add "Multiple Classification" click the icon "Add Multiple Classification".
   a) Another classification window opens as a tab
5. Enter the additional information
   a) If necessary, you can add as many tabs as you like.
6. Save classification with "OK", or cancel the process with "Cancel".

13.7.2 Multiple Classification / Remove Tab

To remove a non-saved classification tab to a document, complete the following steps

1. To remove "Multiple Classification" click the icon "Remove Multiple Classification".
   a) The selected "Tab" will be deleted.
2. Save classification with "OK", or cancel the process with "Cancel".

13.7.3 Show Multiple Classification

If "Multiple Classifications" were saved to a document the DocID for the respective document in ecoDMS is assigned several times. When you open the Classification dialog for one of the multiple archived documents, the dialog shows all available tabs for which the user has permission.

1. Select document in the ecoDMS table.
2. Select the "Classify" function. You have following options:
   a) Right-click one of the selected documents - Classify **or**
   b) Click the "Classify" icon in toolbar **or**
   c) Enter this shortcut: CTRL + K

13.8 Batch Classify Multiple Documents

In ecoDMS you can batch classify multiple documents with different information.

1. To do so, select your documents using the CTRL key
2. Click "Classify"
   a) Card View and Table View: Button in the Icon bar -> "Classify"
   b) Table View: Right-click -> "Classify"
3. Execute the classification for the first document.

4. Click "Save and Continue"
    a) The classification of the current document is saved and the next selected document displays in the classification dialog

13.9 Undo Classification

You can undo a classification if necessary. All classification attributes of the selected document are then returned to the state it was last saved in.

- For newly archived documents all classification attributes are reset in this case.
- For already archived documents, the classification is reset to the last saved state.

To undo the classification of a document, complete the following steps:

1. Classify an ecoDMS document via the Classification dialog.
2. Click "Undo".

14 Classification Templates (Template Designer)

- **Full Version required:** The feature requires a license for the ecoDMS Full Version but can be tested in the Free Trial. In the Free4Three version, only one Classification Template is available.
- **Quality:** Automatic recognition depends on file type, content, readability, and the quality of the documents.

A Classification Template is a type of rule set that determines how incoming documents are automatically recognized and categorized. This allows documents to be automatically assigned to the appropriate folder, document type, user, and more.

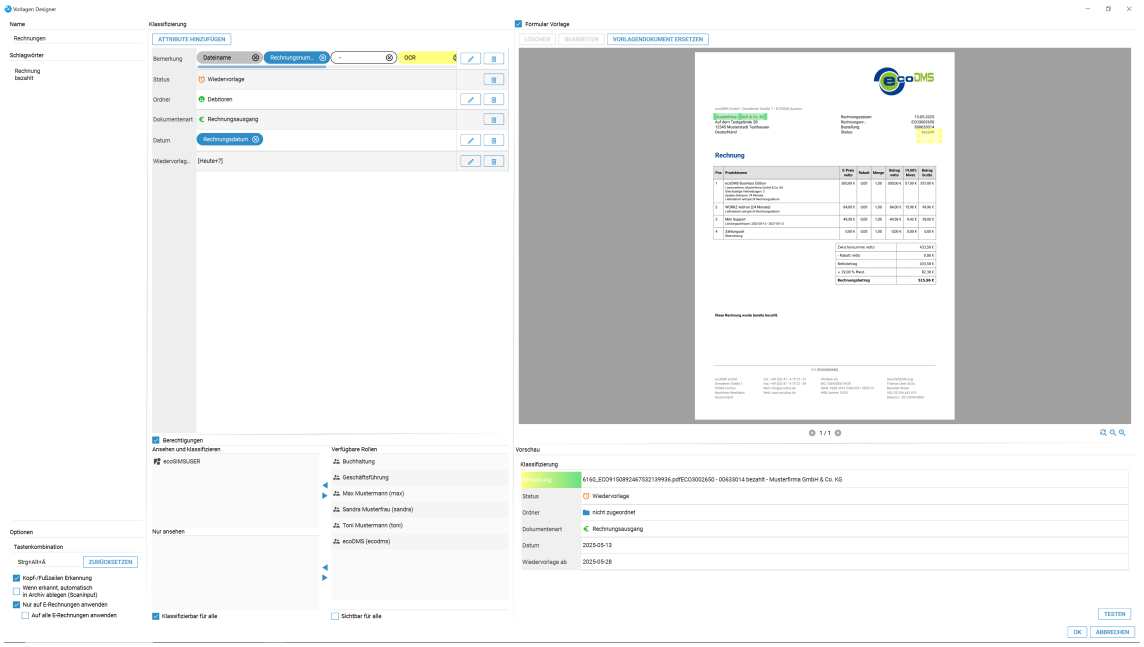


Figure 14.1: Template Designer – Example Classification Template

14.1 Frequently Asked Questions (FAQs) and Notes

With Classification Templates, documents can be automatically recognized, assigned, and stored in the archive.

14.1.1 What does a Classification Template do?

A Classification Template helps the system automatically recognize a document. It checks for specific features such as tags, barcodes, layout, metadata, or markings within the document. When a new document is added to the ecoDMS archive and these features are present, it is automatically classified and – depending on the settings – immediately archived.

14.1.2 Where can I find the templates?

You can access the template management in the classification dialog of a document – depending on your permissions, with different features.

14.1.3 What permissions do I need?

- To create or edit templates, you need the system permission **...use template management. = ecoSIMSTEMPLATES**
- To use the templates, the standard system permission is sufficient: ...**archive and classify documents. = ecoSIMSCLASSIFY**
- For details about the permissions, refer to the manual under 6.1.1.

14.1.4 What is the template document?

Important: For automatic recognition to work reliably, you should use clear and easily identifiable tags. These should appear directly in the document and clearly indicate that it is a matching document.

- A template document is a file in the archive that serves as an example. This file is tagged and can be prepared in the Template Designer so that specific areas of the document – e.g., the date, invoice number, or order number – are marked.
- When a similar document is later added to the archive, ecoDMS automatically reads the marked information and uses it to fill in the appropriate fields in the classification.

14.1.5 Supported File Types and Plugins

The automatic detection works for PDF and TIFF files, e.g., with:

- Standard archiving or Drag & Drop
- Scans via scan input
- PDF/A Printer (no macOS)

- LibreOffice/OpenOffice Plugin
- MS Office/Outlook Plugin (Windows only)
- Thunderbird Plugin (no macOS)

14.1.6 Caution with Multiple Classifications!

If multiple Classification Templates fit a document, ecoDMS displays them as tabs in the classification dialog.

- **Important:** Delete tabs that do not fit before archiving the document.
- **Otherwise:** The document will be archived multiple times – with different classifications and DocIDs.

Tip: Use unique identification features to avoid confusion.

14.2 Open Template Management

The Template Management can be opened via the following ways. Choose one:

1. **Classification dialog:**
   a) Open the classification dialog for any document.
   b) Click the "Templates" button to open the Template Management.
2. **Toolbar:**
   a) Select any document in ecoDMS.
   b) b) Click the "Templates" icon in the toolbar to open the Template Management.



Figure 14.2: Open Template Management (Icon)

14.3 Create Template

With templates ecoDMS can automatically recognize documents and assign them correctly. The system compares certain characteristics in the document with the stored criteria. The template creation takes place via the classification dialog of a document. **Follow these steps:**

14.3.1 Select Document

Select a document in the ecoDMS archive that should serve as the basis (master) for your new template.

14.3.2 Create a Template in the Designer

1. Open the classification dialog of the desired document and click **"Save Template".**
2. In the following window (Template Designer), define the recognition criteria for the template.

14.3.3 Name (Name Template)

Give the template a meaningful name so you can easily find it again or assign it manually if needed. Name is a required field.

14.3.4 Keywords

Keywords form the important basis of the assignment. They are specific terms that must appear in the document for the template to be recognized.

Important notes on using keywords:

- Exact match: All keywords must appear in the document exactly as entered – including uppercase and lowercase letters.
- Do not use separators: Enter keywords without commas or hyphens.
- Automatic AND connection: All entered terms must appear in the document. Only then will the template be applied.

```
Example:
Document content: UID: 123456789 and invoice
Entry of keywords: UID: 123456789 invoice
```

- **Tip:** *Especially in the header or footer area of documents like invoices, there are often clear terms, e.g. IBAN, UID, customer number or VAT ID. Also terms like "invoice", "paid" or "open" are helpful for automatic recognition.*

14.3.4.1 Enter Keywords Manually

Enter the appropriate keywords manually.

14.3.4.2 Adopt Keywords from Preview

```
CTRL + right mouse button (hold)
```

Fügt den markierten Text als zusätzliches Schlagwort hinzu.

```
CTRL + SHIFT + right mouse button (hold)
```

Replaces existing keywords with the new text.

14.3.4.3 Expert Feature: Regular Expressions (RegEx)

Advanced users can use RegEx commands (regular expressions) to define more complex search criteria.

- Each expression must be on its own line.
- – RegEx expressions can be combined with simple keywords.

Specification	Code
Document contains "invoice"	`REGEX:\b(invoice)\b`
Document contains "invoice" or "delivery note"	`REGEX:\b(invoice|delivery note)\b`
Document does not contain "contract"	`!REGEX:\b(contract)\b`
Document contains "invoice" but not "contract"	`REGEX:\b(invoice)\b !REGEX:\b(contract)\b`

14.3.4.4 Use Barcodes for Recognition

- You can also define barcodes with the command BAR:.
- During template recognition (only via Scaninput!) the detected barcodes are compared with those in the keywords.
- If a barcode matches here, the template will be applied to the document.

```
BAR:1234567
BAR:ABC1234
```

14.3.5 Options

In this section you can OPTIONALLY define additional features for your Classification Template.

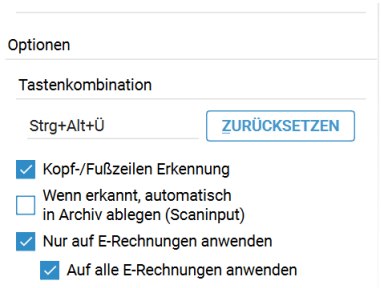


Figure 14.3: Template Designer - Options

14.3.5.1 Shortcut

Here you can define a shortcut to quickly select the template later in the classification dialog.

- As soon as you enter this shortcut in the classification dialog, the associated template will be loaded automatically. The fields will then be filled in directly with the appropriate information.

- By clicking the "Reset" button, you can remove the shortcut at any time.

```
Example:
Ctrl+Alt+J
```

14.3.5.2 Header and Footer Recognition (Text Recognition)

When this feature is enabled, ecoDMS automatically recognizes the text in the upper and lower areas of a document — that is, in the headers and footers. Depending on the resolution and quality of the document, ecoDMS analyzes approximately 10–20% of the top and bottom page areas for recognition. The detected text is stored in the background and used for the automatic assignment of the template..

- **Without user-defined keywords:** The text in the header or footer must match the text in the template exactly for the document to be recognized automatically.
- **With user-defined keywords:** In this case, both the defined keywords and the recognized header/footer text must match the template.

Note: Custom keywords are optional. However, they can be added to make recognition even more precise.

14.3.5.3 Automatically Archive When Recognized (Scaninput)

- Automatic archiving only works for documents that are imported via the Scaninput folder and correctly recognized by the template.
- If the feature is not enabled, the document is not recognized, or, for example, a mandatory field is not filled in, it will still end up in the Inbox when received via Scaninput, so that you can manually classify and archive it.

When creating a Classification Template, you can specify whether a document should be automatically archived after successful recognition. To enable automatic archiving:

1. In the Template Designer, check the box
2. "Automatically archive when recognized" in the "Options" section.
3. Then select the desired target archive where the recognized document should be stored.

14.3.5.4 Special Features for e-Invoices

You can create dedicated Classification Templates for e-Invoices and enable them selectively. Special options are available for this purpose:

14.3.5.4.1 Only Apply for e-Invoices

This setting is the first step to restrict a Classification Template to e-Invoices.

If you activate this option, the template will only be used when:

- it is an e-Invoice such as ZUGFeRD or XRechnung, and
- the defined criteria such as Keywords or header/footer recognition (if enabled) apply.

14.3.5.4.2 Apply to all e-Invoices (without Keyword check)

This option is only available if "Only apply for e-Invoices" was previously activated. It ensures that the template is always used as soon as an e-Invoice is detected — without further checks such as Keywords or headers/footers.

Procedure:

1. Activate the option "Only apply for e-Invoices".
   a) This specifies that the template applies exclusively to e-Invoices.
2. Then activate "Apply to all e-Invoices".
   a) This ensures the template is automatically used for every e-Invoice — regardless of whether Keywords are detected.
3. When activating, a message appears:
   a) "This template is applied to all e-Invoices. Keywords are deactivated for automatic template recognition. Continue?"
4. Confirm with "Yes" to activate the feature — or with "No" to cancel.

Important Notes:

- Keywords as well as header and footer recognition are ignored.
- The template is always applied as soon as an e-Invoice is detected.
- If multiple templates with this setting are active, they are applied in parallel. In the classification dialog, these appear as separate tabs (Multiple Classification, see 13.7.2)
  - Unnecessary classifications can be manually removed before final archiving.

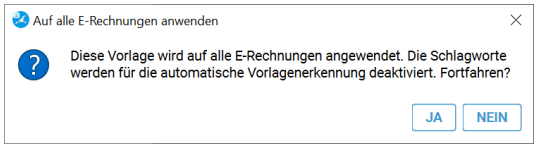


Figure 14.4: Template Designer – Confirm Message: Apply to all e-Invoices

14.3.6 Classification / Select Attributes

In this area, you define which fields should be automatically filled when using a Classification Template. You also specify which information is automatically transferred into the template – for example: an invoice number, a date, the file name, and much more. Depending on the type of field, different options are available to automatically enter the appropriate content.

14.3.6.1 Add Attributes

1. Clicking this button opens a list of all available classification attributes.
2. Check the desired attributes to add them to the template.
3. Depending on the selected attribute, you can now set how and with which content the field is automatically populated.

14.3.6.2 Permissions

In this area, you define which users or groups have access to the document created with this template (see 13.3).

- **You can show or hide the permissions dialog:**
  - Activate the checkmark next to the title "Permissions" to display the settings.
  - Remove the checkmark to hide them.
- **If the "Permissions" area is shown:**
  - You can specifically define which users or groups are allowed to view, edit or classify the document.
- **If the "Permissions" area is hidden:**
  - In this case, no specific permission assignment is made.
  - The system then automatically assigns the standard permission "View and Classify" to all users with the role ecoSIMSUSER.

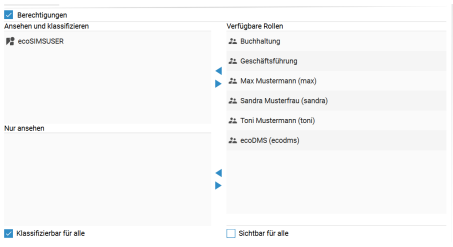


Figure 14.5: Template Designer - Permissions

14.3.6.3 Text Fields (e.g. Comment)

In text fields, you can insert any texts. A typical example is the field Comment. For automatic filling, the following options are available:

- **Free Text Field:** Manual text entry (explanation under 14.3.7.1)
- **File Name:** Insert the file name (explanation under 14.3.7.2)
- **e-Invoice:** Read contents from the XML (explanation under 14.3.7.3)
- **OCR**: Pick content from a marked position in the document (explanation under 14.3.7.4)

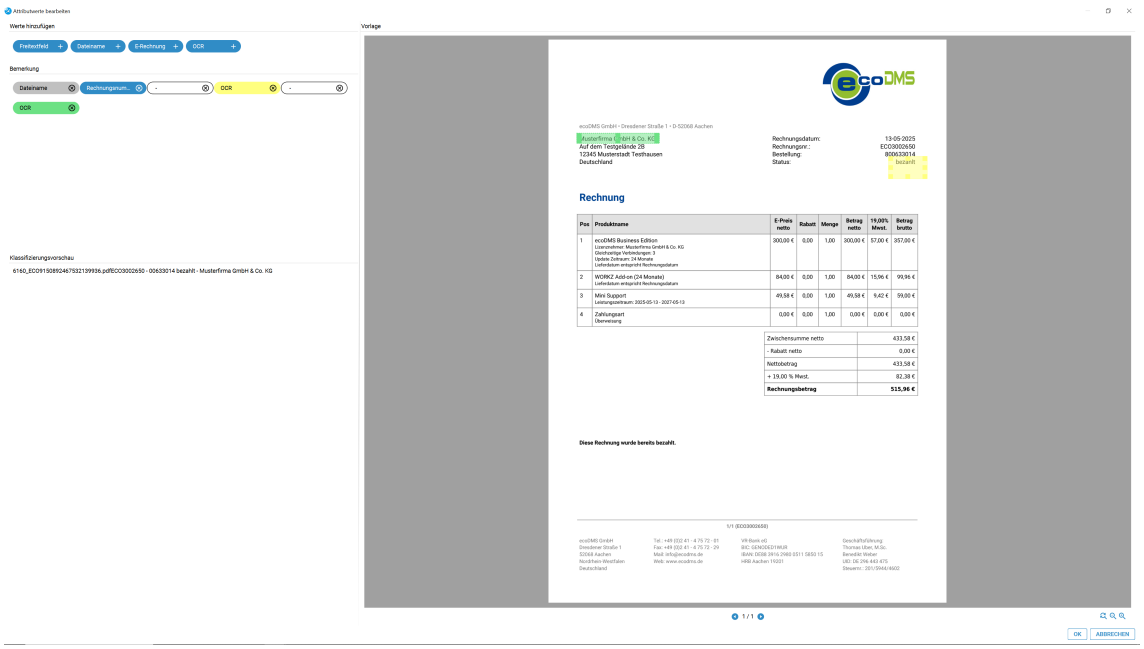


Figure 14.6: Template Designer - Example: Text Fields -> here: Add Different Values

14.3.6.4 Folder

ecoDMS can automatically place the file in a suitable storage folder in the archive based on certain information. The following options are available for this:

- **Folder**: Select folder from the folder structure (explanation under 14.3.7.6)
- **e-Invoice:** Read folder from the XML (explanation under 14.3.7.3)
- **OCR**: Pick folder from a marked position in the document (explanation under 14.3.7.4)

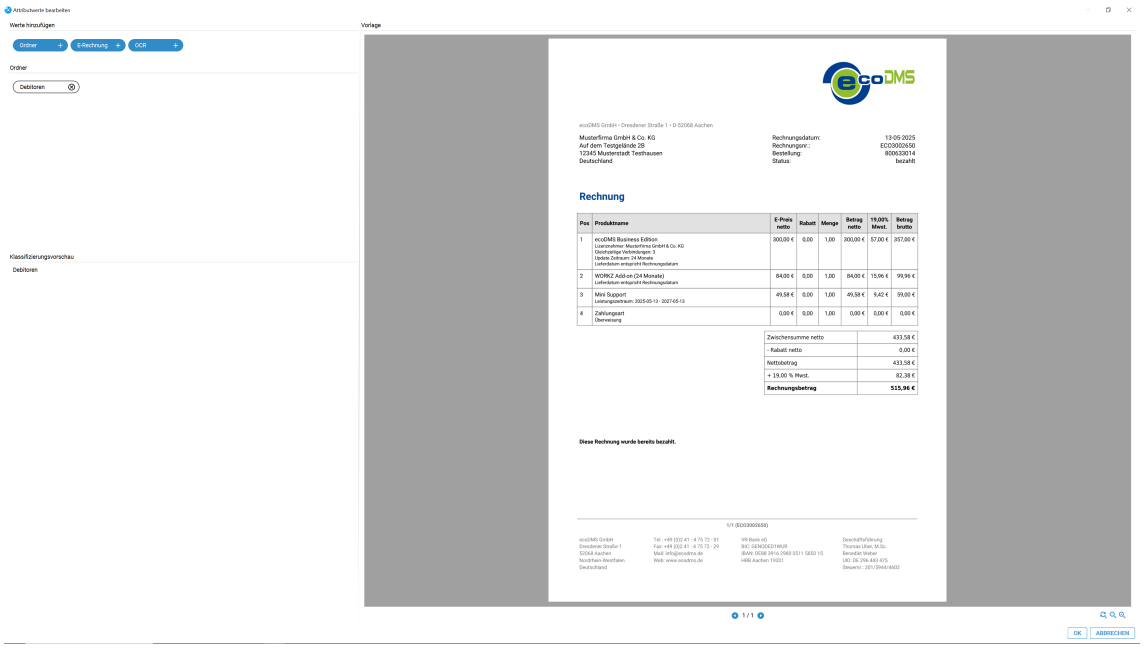


Figure 14.7: Template Designer - Example: Folder -> here: Target Folder from Folder Structure

14.3.6.5 Date Fields

Date information such as invoice date, due date, or a follow-up date can be automatically read from the file and transferred to the corresponding fields. ecoDMS supports the following options for automatic filling:

- **Date**: Store fixed or dynamic date (explanation under 14.3.7.5)
- **e-Invoice:** Read date from the XML; If no date is detected in the document, the current date will be set. (explanation under 14.3.7.3)
- **OCR**: Pick date from a marked position in the document; If no date is detected in the document, the current date will be set. (explanation under 14.3.7.4)

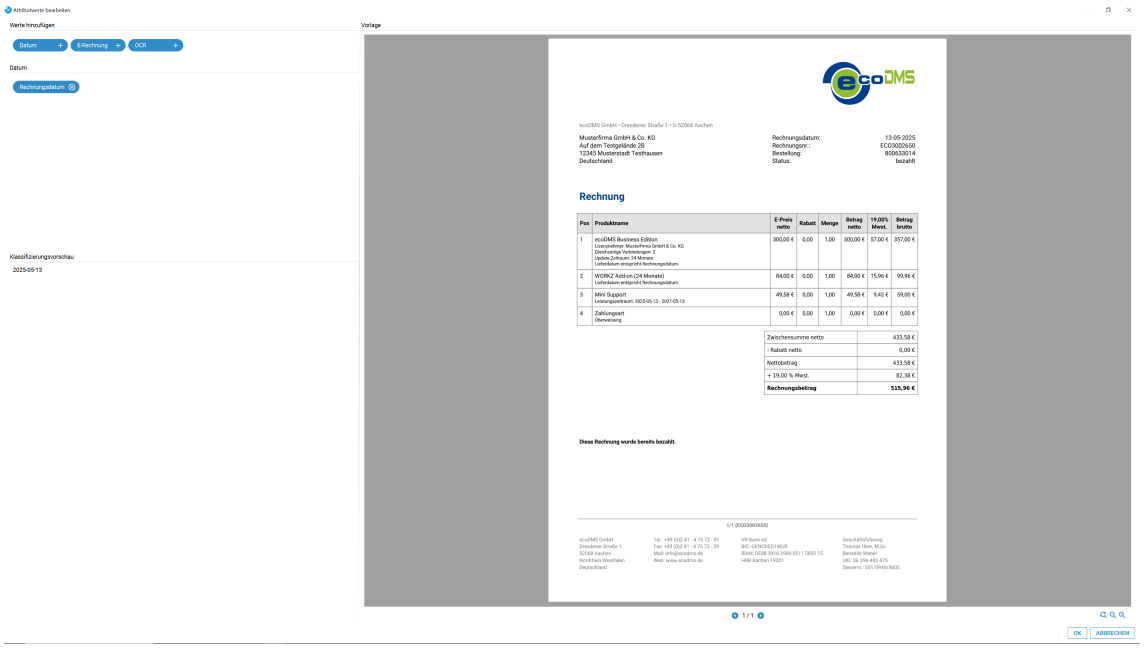


Figure 14.8: Template Designer - Example: Date Fields -> here: Pick Invoice Date from XML

14.3.7 Classification / Attribute Values (Chips)

Depending on the selected attribute, different values are available – we call these "chips."

- **Add:** Click on a chip to add it and immediately see its related options.
- **Edit:** To edit a value, simply click on the corresponding chip in your selection.
- **Delete:** To remove a chip, click the small "x" next to it.

14.3.7.1 Free Text Field

You enter the text manually. There is no automatic filling – the text always remains the same as you set it.

14.3.7.2 File Name

The name of the archived file is automatically transferred into the field – for example, "invoice_12345.pdf"

14.3.7.3 e-Invoice (XML Data)

For electronic invoices in XML format, you can automatically read data such as invoice number, invoice recipient, invoice date, IBAN, and more. This information is taken directly from the XML file and entered into the template. When selecting this feature, ecoDMS displays a list of found values from the stored XML file. These can be added as values for automatic classification with a click.

14.3.7.4 OCR (Text Recognition)

With text recognition (OCR), content can be taken directly from a PDF document. This works, for example, as follows:

- **Recognize invoice amount:** The amount is automatically detected on the last or second to last page.
- **Search for text patterns:** Using so-called RegEx expressions, patterns such as barcodes or numbers can be specifically searched.
- **Take text sections or data:** You can also mark specific text areas or date information in the document that should be taken.

14.3.7.4.1 How to Mark a Position in the Document

1. Select OCR as the criterion.
2. A window with suitable settings for the selected attribute opens (see 14.3.7.4.2)
3. Once the settings are confirmed, a colored box appears in the preview.
4. Drag this box to the desired text in the document.
5. Make sure that the entire text is contained within the box.

14.3.7.4.2 Additional OCR Settings

Depending on the field, you can further refine the recognition.

14.3.7.4.2.1 Search Settings

- **Search on the last page:** Useful if the value is always found on the last page.
- **Pages - Offset:** Specifies on which page the searched content is located.

> Examples:
> "0" = last page
> "-1" = second to last page

14.3.7.4.2.2 Date Format

You can specify the desired date format, e.g.:

```
dd.mm.yyyy
```

10.12.2018

```
mm/dd/yyyy
```

12/30/2018

```
d-M-yy
```

8-12-18

Explanation of abbreviations::

- d = day (1–31), dd = with leading zero
- M = month (1–12), MM = with leading zero
- yy = two-digit year, yyyy = four-digit year
- ddd = abbreviated weekday (e.g. Mon), dddd = full weekday name (e.g. Monday)

14.3.7.4.2.3 Allowed Characters (e.g. for Folders & Text Fields)

You can specify which characters should be accepted. Enter them without hyphens or spaces.

Only Numbers:

For example, enter:

```
0123456789
```

From the following content in the document

```
ABC#1234 ecD24!
```

you get

```
123424
```

Only Letters:

For example, enter:

```
AaBbCcDdEeFfGg
```

From the following content in the document

```
ABC#1234 ecD24!
```

you get

```
ABCecD
```

Combinations of letters, numbers, and special characters are also possible.

14.3.7.4.2.4 Allowed Characters: RegEx (Regular Expressions – Expert Feature!)

- RegEx works only in free text fields.
- Each expression must be on its own line.

RegEx allows you to extract content based on patterns – regardless of where exactly they appear in the marked area.

Here are some examples of RegEx you can use:

1. **Extract Subtotal:**

```
REGEX:(?<=Subtotal:)\s*(\d{0,3}\.{0,1}\d{1,3},\d{2})
```

For example, finds from "Subtotal: 289,95" -> 289,95

(?<=Subtotal:) looks for the string "Subtotal:"

([\s]*) placeholder for one or more whitespace characters

This REGEX extracts amounts up to 999,999,999.99. You can increase the upper limit by repeating the part \d{0,3}.{0,1}.

2. **Extract name::**

```
REGEX:(?i)(?<=Name)([\s]*)\b([\S]*)\b
```

For example, finds from "Name Mustermann" -> Mustermann

(?i) makes the search case-insensitive, so "Name", "name", or "NAME" are all recognized equally.

(?<=Name) looks for the word "Name" before the actual term to extract.

([\s]*) placeholder for one or more whitespace characters

\b([\S]*)\b placeholder for the following term up to the next whitespace

3. **Extract term (e.g. on next line) including umlauts::**

```
REGEX:(?i)(?<=Payment Type)([\s])+(\p{L}+)
```

This regular expression finds a term like "Überweisung" (german for "Bank Transfer") that directly follows the word "Payment Type" – even if it starts on the next line.

(?i) makes the search case-insensitive so "Payment Type", "payment type", or "PAYMENT TYPE" are recognized equally.

(?<=Payment Type) looks for the word "Payment Type" before the actual term to extract.

([\s])+ allows spaces or line breaks after "Payment Type", so the searched term can also be on the next line.

\s: stands for any whitespace (space, tab, line break, etc.).

+: means one or more occurrences of the preceding element.

(\p{L}+): This is the second capture group and the actual interesting part that captures the searched information.

\p{L}: stands for any Unicode letter. This is important because it covers not only English letters (a-z, A-Z) but also umlauts (ä, ö, ü) and other letters from various languages.

+: means one or more letters occurring consecutively.

14.3.7.4.2.5 Use the Following Information (Folder Recognition)

ecoDMS can automatically assign a folder based on content at a specific position in the document. You can specify which of these values should be used:

- Folder name

- Key
- Keywords

Simply activate the appropriate checkboxes.

14.3.7.4.2.6 Selection is a Barcode

ecoDMS automatically recognizes the content of a barcode and enters it into the corresponding field. Both classic barcodes and modern 2D barcodes are supported.

If you want to mark a barcode in the document, proceed as follows:

1. Click on "Options".
2. Activate "Selection is a Barcode".

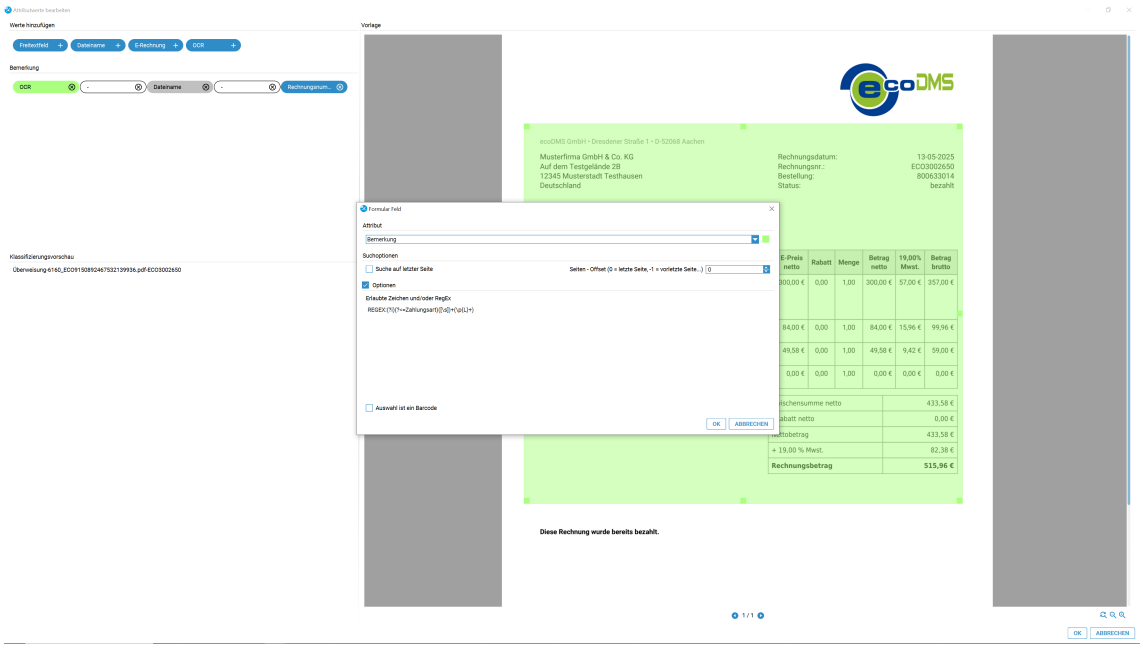


Figure 14.9: Template Designer – Example: Form Template -> Mark Area + Assign RegEx

14.3.7.5 Date

With the "Date" option, you can specify in a Classification Template which date is set automatically during archiving. You have two options: a fixed date or a dynamically calculated date.

14.3.7.5.1 Fixed Date If a fixed date should be set for all documents – for example, a recurring reminder date that is always the same – you can select this directly in the calendar. This date remains the same for all documents using the template. Here's how:

1. Click the "Edit" button for the desired date attribute.
2. Then select the value "Date".
3. In the displayed calendar, click the desired date.

4. Clicking "Today" automatically enters the current date.
5. The selected date is then permanently saved in the Classification Template.

14.3.7.5.2 Dynamic Date Alternatively, you can use a dynamic date – meaning the date automatically adjusts depending on when the document is archived. This is useful, for example, for reminder dates.

1. Click the "Edit" button for the desired date.
2. Then click the value "Date".
3. In the calendar, select "Dynamic Date".
4. Now choose a suitable option, for example:
   a) Today, Yesterday, Tomorrow
   b) This Week, Last Week
   c) This Month, Next Year, This Quarter, etc.
   d) Only for the resubmission date all classification attributes of the "date" type are listed additionally.
   e) If the attribute was not recognized/filled, the current date is set. In both cases, the entry under "Advanced Options" (always in days) is taken into account.
5. Under "Advanced – Options" you can additionally specify how much the date should be shifted – e.g. +3 days, -1 week, or +2 months. ecoDMS then automatically calculates the appropriate date:

   Examples:

   ```
   Reminder Date = Today + 7 days
   [TODAY] 2021-12-16 + 7 = 2021-12-23
   ```

   ```
   Reminder Date = Month + 2 months
   [MONTH] 2021-12-22 + 2 = 2022-02-22
   ```

   ```
   Reminder Date = Year + 10 years
   [YEAR] 2021-12-31 + 10 = 2031-12-31
   ```

6. Confirm your selection with "OK" or cancel the process with "Cancel".

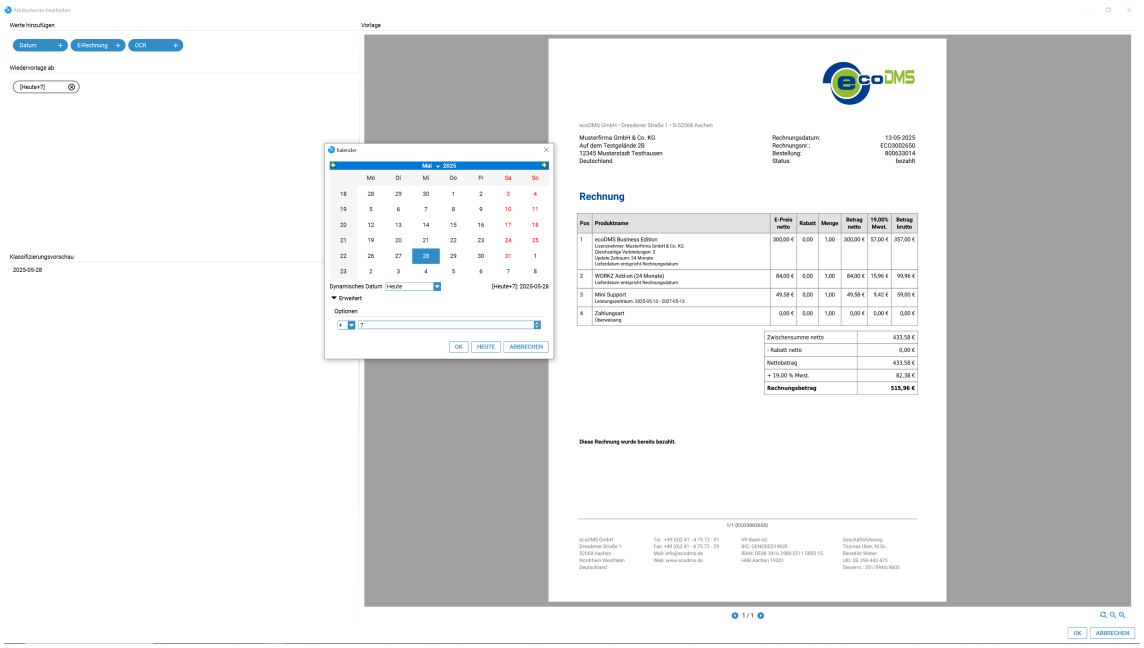


Figure 14.10: Template Designer – Dynamic Reminder Date -> here: TODAY + 7 Days

14.3.7.6 Folder

For the "Folder" attribute, you can define the archive folder in which a document should be automatically stored as soon as a template is recognized. Here's how it works:

1. Click the "Edit" button for the desired folder attribute.
2. Then click the value "Folder".
3. The folder structure of ecoDMS will open.
4. Double-click the desired target folder to select it.
5. The selected folder is then permanently saved in the template.
6. All documents to which this template is applied will automatically be classified with this folder.

14.3.8 Test Template

Below the form template in the overview is a Classification Template preview. This preview is filled with data by clicking the Test button. It should be noted that some system attributes may not be filled by the template (because they are not specified in the template). The following standard values are always displayed in the test preview:

- Folder: not assigned
- – Status: To edit
- Document type: not assigned

These values are also visible in the test preview to ensure a complete overview.
Attributes that are not editable by the user are not shown in the preview, such as:

- DocID, Revision, Last change, Edited by

This ensures that the test preview remains clear and focuses on relevant information.

14.4 Select Template (Manually)

The recognition of a Classification Template in ecoDMS can be triggered either automatically by the system—based on the document content and configuration—or manually by the user. This section describes how to manually select and apply a template to a document.

14.4.1 Selection in the Classification Dialog

1. Open the classification dialog for the desired document.
2. You have three ways to manually select a Classification Template:
   a) Using the "Templates" button:
      i. In the classification dialog, click the "Templates" button.
      ii. Select the desired template from the list and click "Apply".
   b) Using the context menu:
      i. Right-click in the "Permissions" area.
      ii. Select "Templates" to choose an appropriate template.
   c) Using a keyboard shortcut:
      i. If a template has been linked to a keyboard shortcut, you can use it directly to call up the template.

14.4.2 Apply Template in the Inbox

After scanning or importing documents into the Inbox—e.g., via TWAIN, WIA, SANE, or other sources—you can manually assign the appropriate template. You can learn more about this function under 12.8.

1. Open the ecoDMS Inbox.
2. Select the desired document.
3. Now you have the following options:
   a) Click the "Find Matching Classification Template" icon in the Inbox menu
   b) Or press the F4 function key on your keyboard.



Figure 14.11: Manually Start Template Recognition in the Inbox for the Current Document

14.5 Edit Template

If you have the required permission, you can edit existing Classification Templates as needed.

1. Open the classification dialog for any document.
2. Click the "Templates" button.
3. In the template management view, select the template you want to edit.
4. Click "Edit".
5. Make the necessary changes.
6. Save the changes by clicking "OK" or cancel with "Cancel".

14.6 Replace Template Document (Master)

A template document is a sample document that shows the system how similar documents should be recognized and classified automatically. If you want to replace the linked PDF document in an existing Classification Template with another one, follow these steps:

1. Open the document that should serve as the new template.
2. Open the classification dialog for this document.
3. Click the "Templates" button.
4. In the list, select the desired template.
5. Click "Edit".
6. In the **enabled** "Form Template" section, click "Replace Template Document".
    a) The previously linked template document will now be replaced with the currently opened document.
7. Confirm the change with "OK" or cancel with "Cancel".

14.7 Copy Template

If you have the required permission, you can duplicate existing Classification Templates and adjust them if needed.

1. Open the classification dialog for any document.
2. Click the "Templates" button.
3. In the template management view, select the template you want to copy.
4. Click "Copy".
5. Assign a name to the new template.

6. The Template Designer opens automatically.
    a) Make any necessary changes to the copied template.
7. Save the template by clicking "OK" or cancel with "Cancel".

14.8 Delete Template

With appropriate permissions, you can delete Classification Templates that are no longer needed.

1. Open the classification dialog for any document.
2. Click the "Templates" button.
3. In the template management view, select the template you want to delete.
4. Click "Delete".
5. Confirm the action with "OK" or cancel with "Cancel".

15 Display, Download, Export, Preview)

You can open archived documents from ecoDMS and download (export) them.

15.1 Download / Export

1. Select the documents in ecoDMS.
    a) Press and hold the CTRL key to select several documents at once
2. Select the "Download" function using one of the following options:
    a) **Table view:** Right-click one of the selected documents - Download
    b) **Toolbar:** "Download" icon
    c) **Menu:** File -> Download
    d) **Keyboard shortcut:** CTRL + E
3. A new window opens. Select the destination path for exporting.
    a) Enable the checkbox "Export as Zip-archive" in the dialog if you want to export data as ZIP-archive.
    b) Now name the Zip-archive.
    c) If you wish to take any markings into account when downloading, select the desired colors. Please read the explanations in this manual under 18.5.3.
4. Confirm your entry by clicking the "Open" button.
    a) Depending on the data volume the export may take some time.



Figure 15.1: Icon - Download

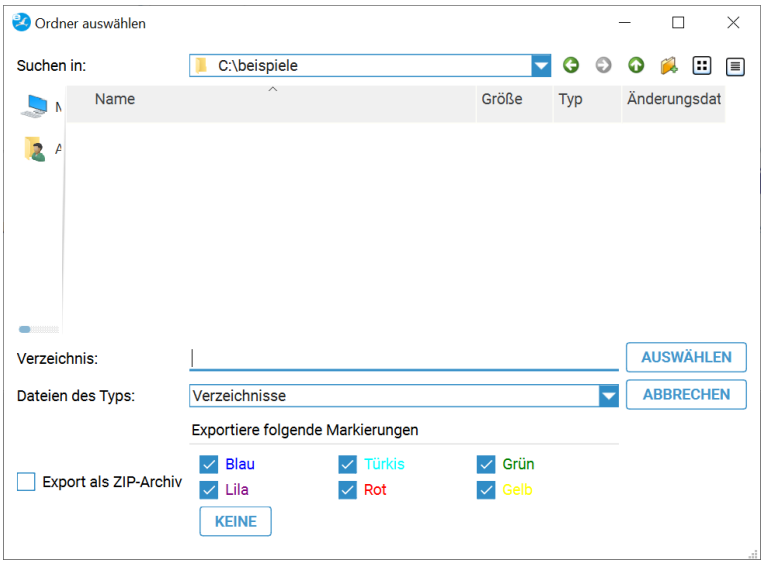


Figure 15.2: Download Documents from ecoDMS (here: incl. Markers)

15.2 Download via Drag and Drop

If you want to download documents, you can drag the documents from ecoDMS into the file system with the mouse (but you cannot move them!)

1. Click and press the left mouse button to select the documents in the table
2. Drag your selection to a location in your file system (e.g. on the desktop).

15.3 Exporting Originals via the Context Menu

With ecoDMS, you can easily retrieve archived documents using the DocID and send them via email or export them as usual. Additionally, ecoDMS offers a dedicated export function for original files that are accessible via the version management system. This feature allows you to specifically export originals of archived documents via the context menu. Follow these steps:

1. Select documents: Highlight one or more documents that you want to export.
2. Access the export function: Right-click on the selected documents. In the context menu, navigate to Actions and select the Export Originals option.
3. Specify the destination folder: After selecting the function, the Choose Folder window will appear. Here, you can define the target directory where the exported files will be saved.
4. Utilize export options: If desired, enable the Export as ZIP Archive option to save the exported original files collectively in a ZIP file.
5. Specifics of exported files: Depending on the document type, ecoDMS displays different contents when opening the exported original file, for example:

a) ZUGFeRD files: When opening an exported original file, the PDF is displayed, while the original XML file is only available as an attachment.

b) XRechnungen: The original XML file is directly displayed.

c) Office documents: For documents archived using an Office plugin, the original Office file is provided.

d) Image Files: ecoDMS converts images into PDFs. When exporting, you will receive the original image file (e.g., JPG, PNG, etc.).

15.4 Reload Documents

When you start ecoDMS, documents and classifications are automatically retrieved and refreshed.

New files and classifications continually enter ecoDMS. To reload the overview of visible documents and classifications on your workstation, complete the following steps:

1. Toolbar: Click the "Reload" icon



Figure 15.3: Icon - Reload Documents

15.5 View Documents

Open Single Document Directly:

- Table view: Double-click the DocID of a document
- Card view: Double-click the preview of a document

To open documents in ecoDMS, complete the following steps:

1. Select one or more documents in ecoDMS.
   a) Press and hold the CTRL key to select several documents at once.
2. Execute the "Open" function using one of the following options:
   a) Menu: File -> Open

b) Table view: Right-click -> Actions -> Open

c) Card view: Actions tab -> View (Open Document)

d) Keyboard shortcut: CTRL + S



Figure 15.4: Icon - View Document(s)

15.6 Preview Pane

- The preview only displays PDF documents.
- Depending on file size and volume, it may take a while for the documents to display.
- Please note that all settings for the document preview are saved to your workstation and not to your user profile.
- Viewing a preview (table view + map view) requires a license of the ecoDMS full version, but can be tested within the demo version. This feature is not enabled in the Free4Three version.

ecoDMS has four types of document preview:

- Document preview in a tile (Card view)
- Document preview in a separate preview pane
- Document preview during classification

The preview pane is a separate pane in the ecoDMS client. It is not the preview in the card view or during classification, but a separate area in ecoDMS. You can enable and set up this area for each workstation. In addition to the simple card preview, the preview pane provides more features.

15.6.1 Show/Hide Preview Pane

In the Table view, the separate preview pane usually displays automatically. In the Cards view, the separate preview pane is usually hidden.

You can show or hide the preview pane on your workstation in the Cards or the Table view. To do so, complete the following steps:

1. Right-click the ribbon of ecoDMS Client.
   a) The menu displays all available panes you can show and hide.
2. Enable "Preview" to show the preview pane.
   a) Disable "Preview" to hide the preview pane.

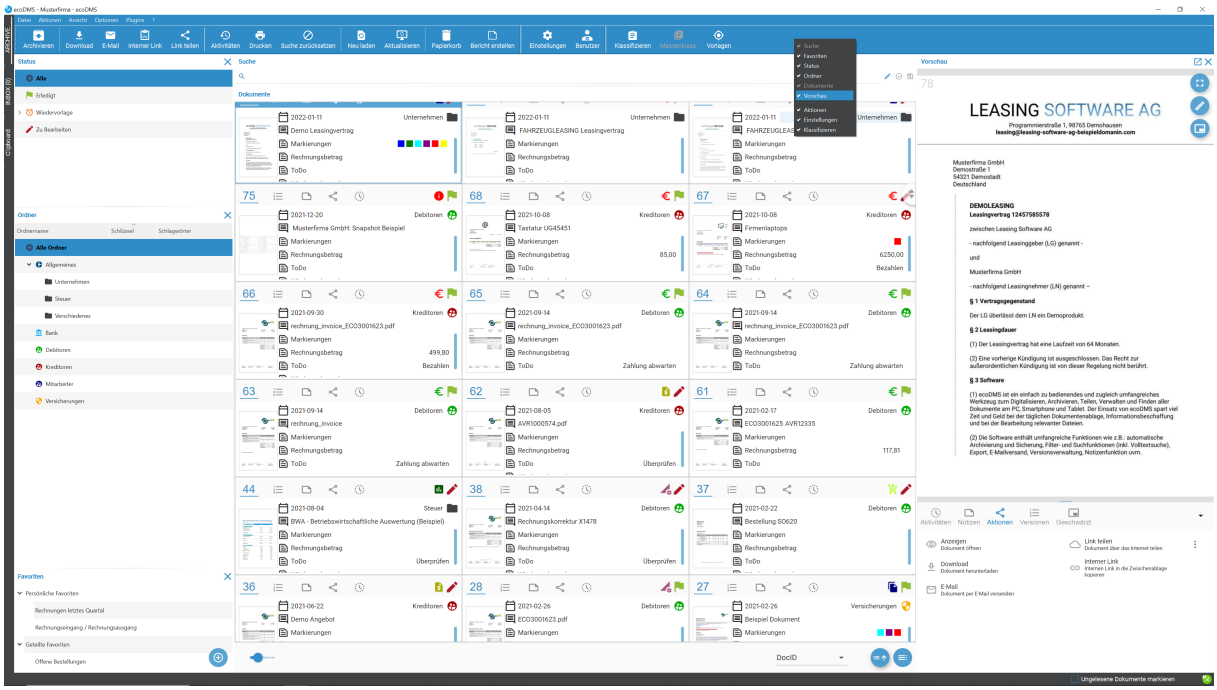


Figure 15.5: Show Preview Pane (here: in Addition to Cards View)

15.6.2 Scalability: Preview in Focus

- Please note that these settings are saved to your workstation and not to the user profile.

If you want to have the document preview in focus, you can scale the preview pane on your workstation and minimize the feature area below the document preview.

15.6.2.1 Scale Preview Pane

You can scale the width and height of the preview pane. Use the mouse to move the boundaries between the upper preview and the feature tabs below up and down. Moreover, you can scale the width of the entire window (preview including feature area).

15.6.2.2 Minimize Feature Area (Tabs)

Minimize the tabs below the preview pane to make more room for the document preview. To do so, complete the following steps:

1. To do so, click the arrow in the ribbon of the feature area to minimize it.
2. Click the arrow again to maximize the feature area.

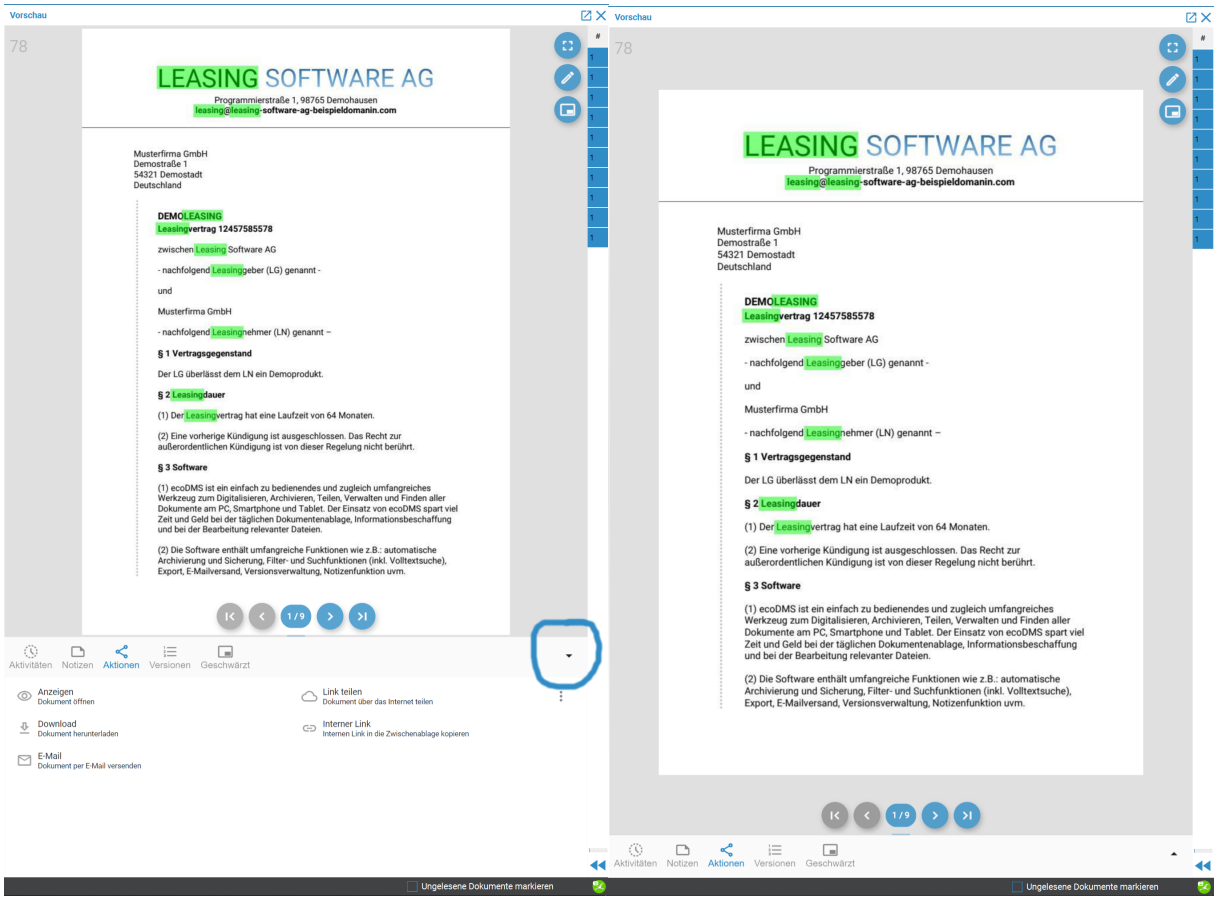


Figure 15.6: Preview Pane: Minimize / Maximize Feature Area

15.6.3 Load / No PDF Preview

- Please note that these settings are saved to your workstation and not to the user profile.

To load or close the preview pane for the PDF preview, complete the following steps:

1. Right-click the title bar of the "Preview" pane.
2. Click "Quality of Preview"
   a) Display preview: Enable "Preview" (check)
   b) Do not display preview: Disable "Preview" (uncheck)

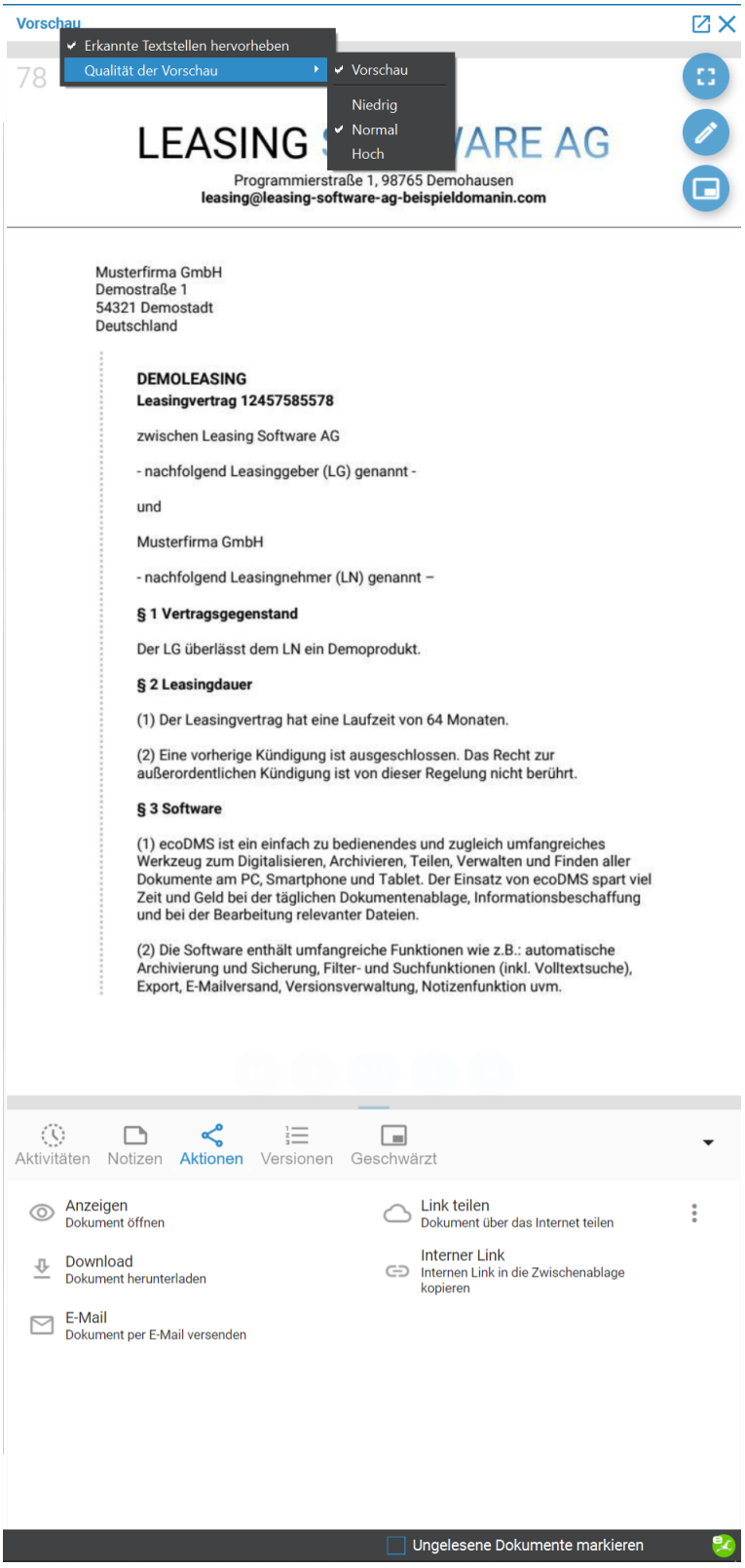


Figure 15.7: Preview Pane: Load Preview / No Preview

15.6.4 Preview Quality

- Please note that these settings are saved to your workstation and not to the user profile.
- The higher the quality, the better the document recognition process.
- Please note that a better quality slows down the loading time.

To configure the preview quality, complete the following steps:

1. Right-click the title bar of the "Preview" pane.
2. Click "Quality of Preview"
3. Select a quality. You can choose the following values:
    a) Low
    b) Normal
    c) High

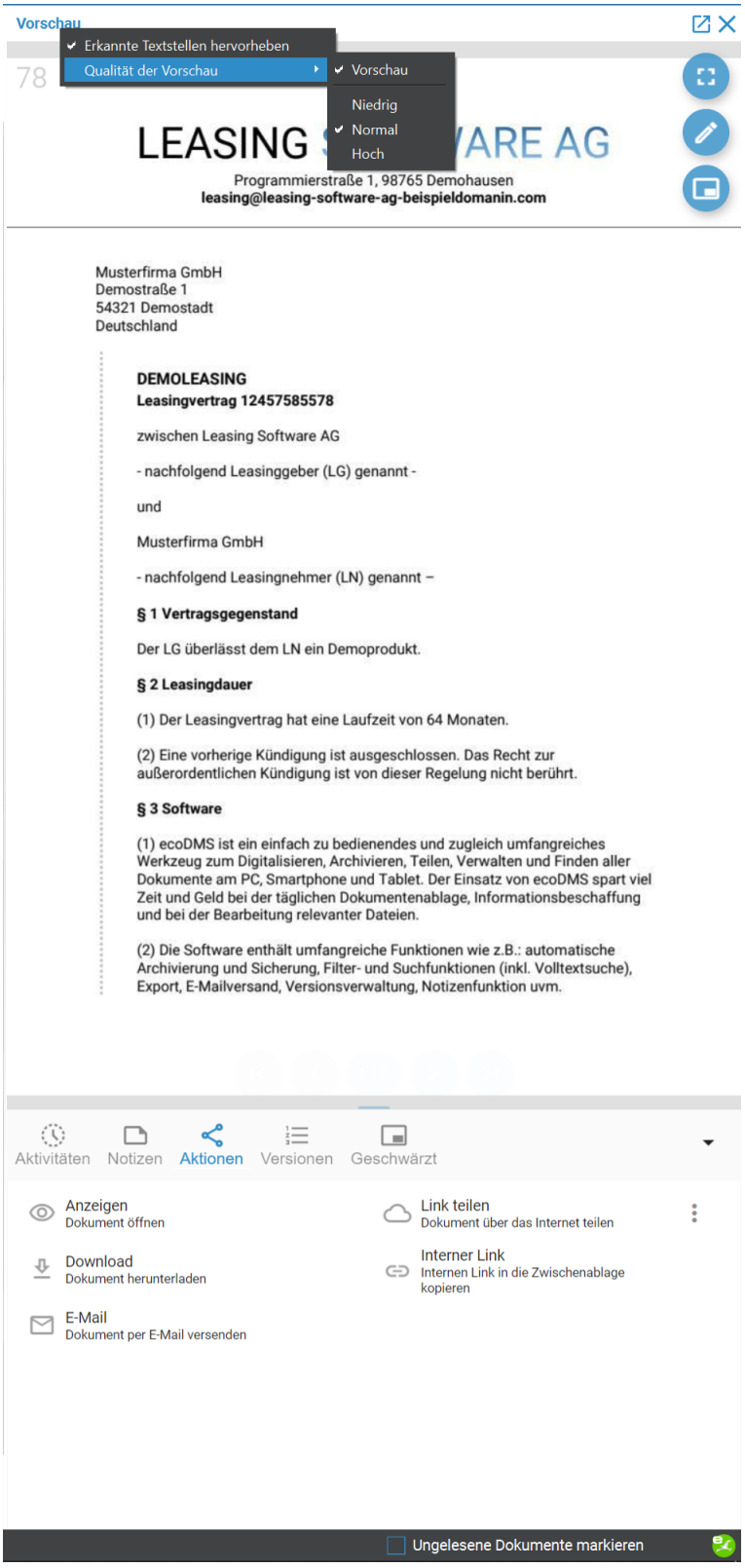


Figure 15.8: Preview Pane: Quality of Preview

15.6.5 Highlight Recognized Text

- Please note that these settings are saved to your workstation and not to the user profile.

In a full-text search, ecoDMS highlights the recognized search terms in the preview pane. If a keyword occurs multiple times within a document, ecoDMS also displays an overview of the text snippets containing the term in the preview pane. Click the mouse to skip to the required passages. To manage the setting, complete the following steps:

1. Right-click the title bar of the "Preview" pane.
   a) To enable "Highlight Search Results": Check
   b) Erkannte Stellen hervorheben deaktivieren: Uncheck

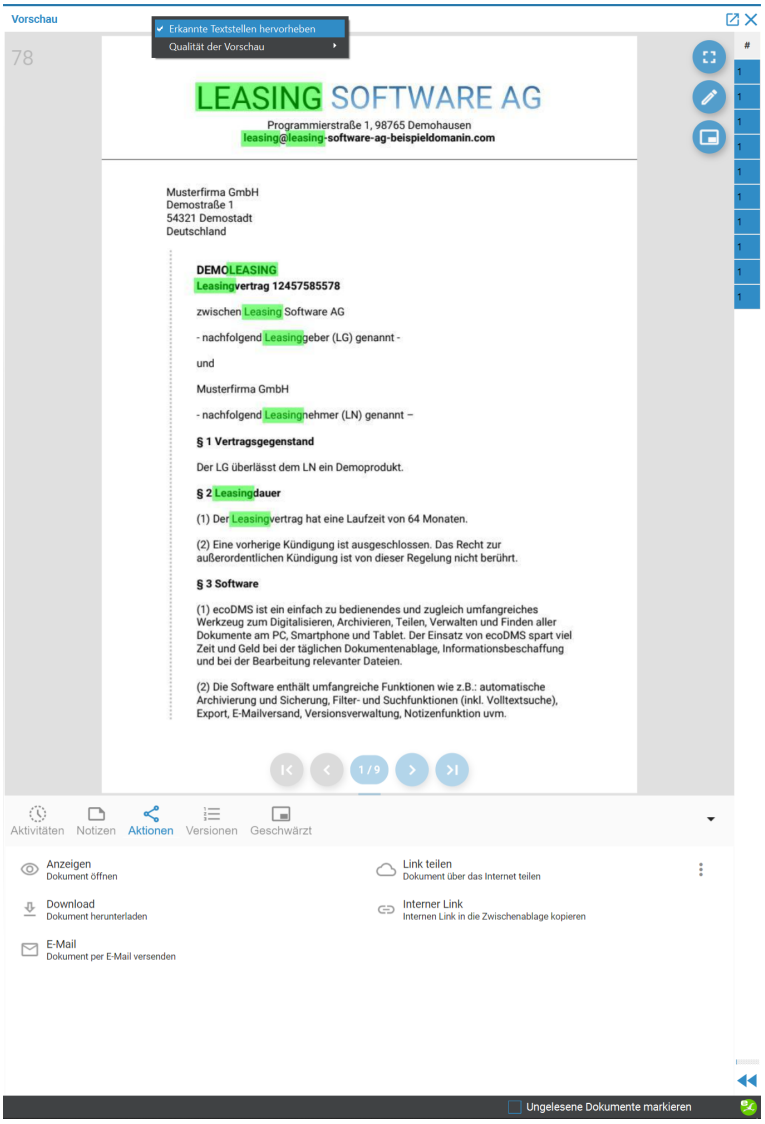


Figure 15.9: Preview Pane: Highlight Search Results

15.6.6 Zoom Preview

In the Preview pane you can zoom the displayed document.

- Zoom in and out by holding CTRL and scrolling up or down with the mouse.

15.6.7 Preview Full Screen

To view the preview in full screen mode, complete the following steps:

1. Click the Full Screen icon in the Preview window.
2. ecoDMS displays the preview in full screen mode.
   a) If a document has several pages, users can toggle from page to page.



Figure 15.10: Icon - Preview Full Screen

15.7 Data Export Plugin

- Only users (administrators) with the ecoSIMSAdmin role / permission can access this feature. For all other users this feature is not visible.
- When exporting data, the administrator can export all documents regardless of their permission.
- The documents are exported with all associated information and versions.
- The exported files are saved as ZIP files.
- The export duration depends on the technical system environment and the data volume.
- A complete and clean export process always takes some time.
- An offline reader is also exported to retrieve and view the documents offline" (without a connection to ecoDMS).
- This feature requires a license for the full version of ecoDMS but can also be tested in the trial version. This feature is not enabled in the Free4Three version.

Use the data export plugin, which is integrated in ecoDMS by default, to export and save selected documents and their classification attributes to any data carrier.

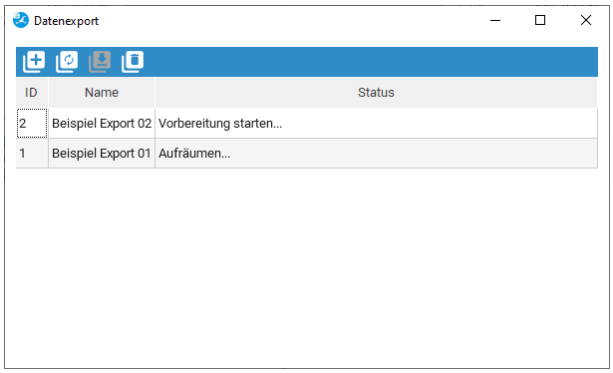


Figure 15.11: Plugin: Data Export

15.7.1 Open Plugin

The data export plugin is integrated in ecoDMS. Click the following menu items to load the plugin:

1. Menu: Plugins -> Data Export -> All Data Exports

15.7.2 Select and Download Data

1. Open data export:
    a) Menu: Plugins -> Data Export -> All Data Exports
    b) Menu: Plugins -> Data Export -> Create New Export
2. Select the "Create New Export" function using one of the following options:
    a) Menu: Plugins -> Data Export -> All Data Exports -> Create New Export (icon in the data export window)
    b) Menu: Plugins -> Data Export -> Create New Export
3. Enter the "export criteria"
    a) This operation is the same as the "Advanced Search"
    b) You can also choose from the saved favorites

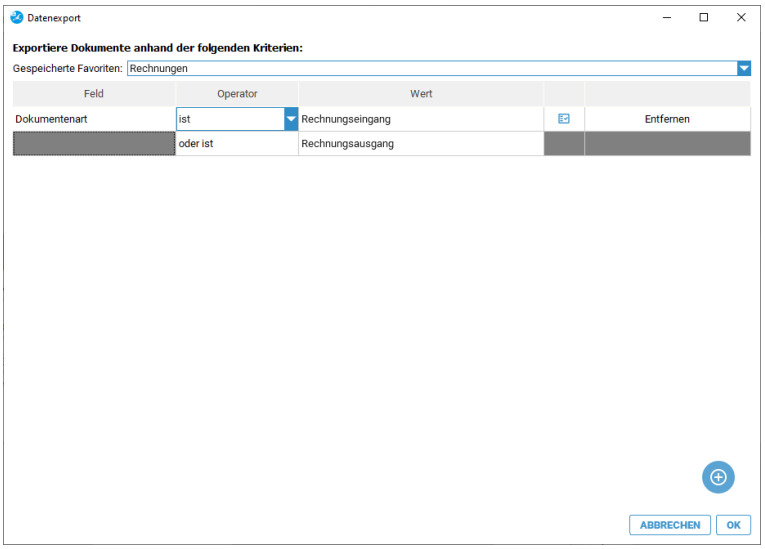


Figure 15.12: Plugin: Data Export - Enter Criteria

4. Assign a name to the "export" and click "OK" to continue.

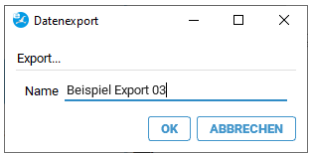


Figure 15.13: Plugin: Data Export - Assign Name for Export

5. Now switch to the data export window.
   a) This window displays all available exports.
   b) It may take some time for ecoDMS to read in the files and prepare them for "export". The wait time depends on the data volume.
   c) During preparation, you can call the current status manually with the "Update Export Status" icon. The available statuses are:
      i. Start preparation...
      ii. Prepare database...
      iii. Prepare files...
      iv. Preparation complete.
      v. Packing data...
      vi. Clean up...
      vii. Ready for download.
   d) You can start exporting when the status "Ready for download" displays.
6. Click the "Start Export Download" icon.
7. A dialog opens. Select the language for the installation and confirm your selection.

8. The export is executed.
    a) The duration depends on the data volume.

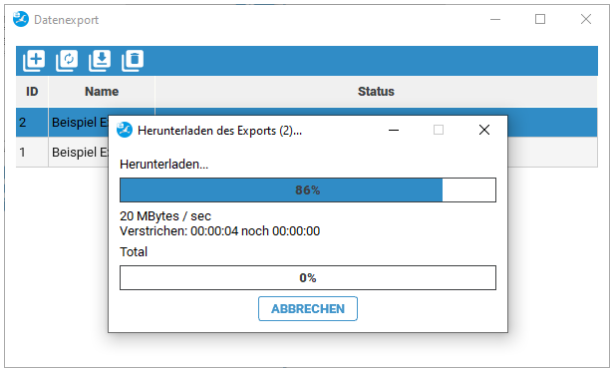


Figure 15.14: Plugin: Data Export - Download Process

15.7.3 Remove Export from List

To delete a request for data export from the list, complete the following steps:

1. Select the desired export in the Data Export window.
2. Click the "Remove Export from List" icon.
3. Confirm the confirmation prompt.
4. You have now deleted the "Export" request.



Figure 15.15: Icon - Remove Export from List

15.7.4 Access Exported Documents

After the Data Export ecoDMS deposits a "ZIP file" in the selected destination folder.

1. Unpack the zip file.
2. Click through the folders until you find the "Archives" folder.
    a) This is where all exported documents / files and versions (if available) are archived.

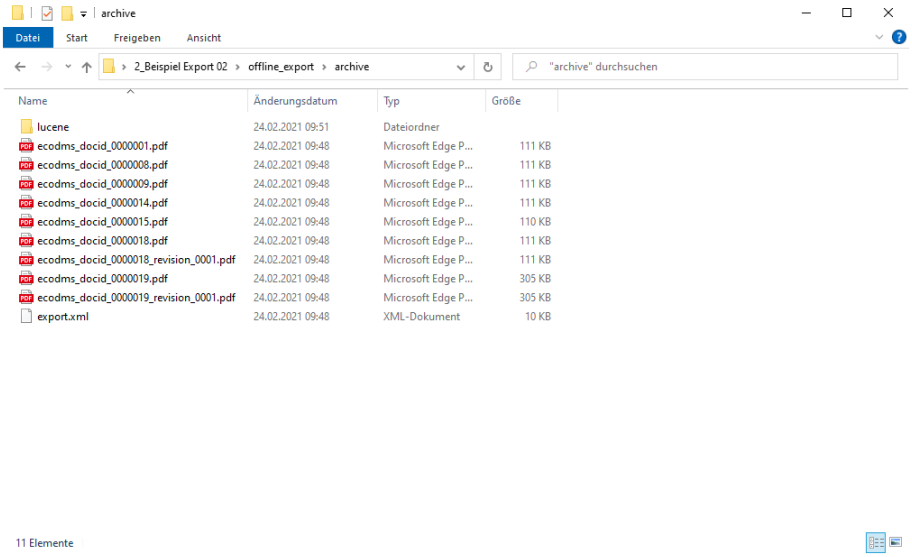


Figure 15.16: Plugin: Data Export - File System - Offline Export - Archive

15.7.5 Access XML Information

The Data Export also creates a XML file named "export.xml". The file includes all available classification and version information to the exported documents.

1. Unpack the zip file.
2. Click through the folders until you find the "Archives" folder.
   a) Here you will find the XML-file including all information.

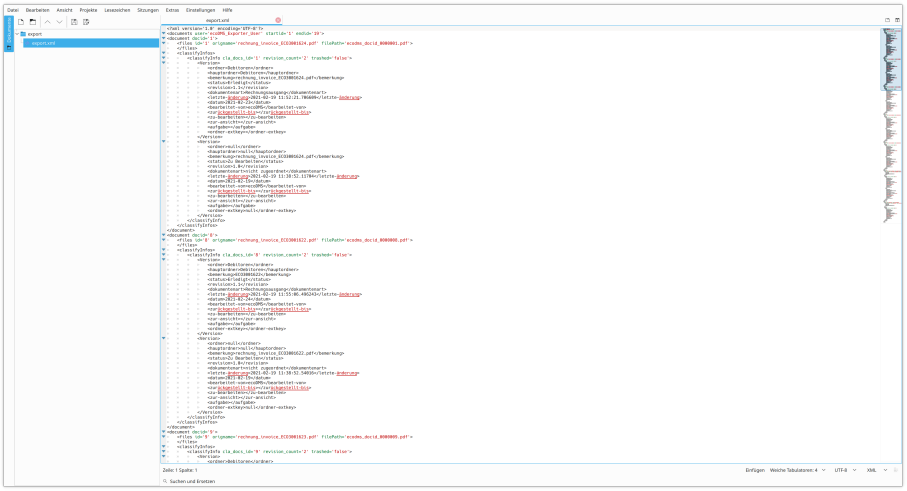


Figure 15.17: Plugin: Data Export - XML File (Example)

15.8 Offline Client

- **The executable file "ecodmsclient.exe" to start the ecoDMS Offline Client is located in the "offline_export" folder.**
- **You can only start the offline client under Windows.**
- **This feature requires a license for the full version of ecoDMS but can also be tested in the trial version. This feature is not enabled in the Free4Three version.**

The data export plugin automatically saves an offline client. You can use the offline client under Windows and execute simple standard searches (full text search, status, folder). This client does not require access to ecoDMS Server. You can copy the entire folder, which was created when exporting data, to any data carrier to allow external access to the exported documents without login and without an ecoDMS installation.

15.8.1 Start Offline Client

After the Data Export ecoDMS deposits a "ZIP file" in the selected destination folder.

1. Unpack the zip file.
2. Click through the folders to the folder which contains the "ecodmsclient" application.
3. Double-click the ecoDMS file to start the offline client.
    a) Now all common search functions, structures and exported documents are available offline.

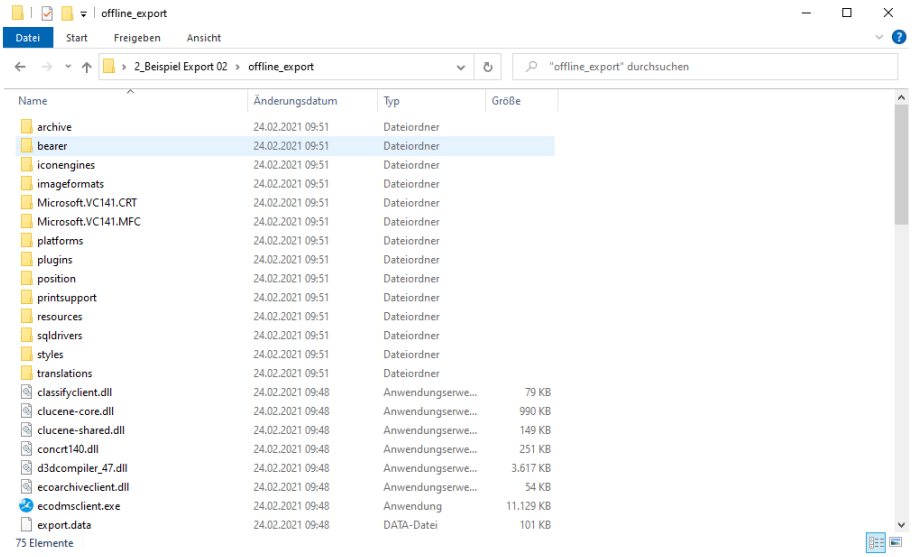


Figure 15.18: Plugin: Data Export - Filesystem - Unzipped File

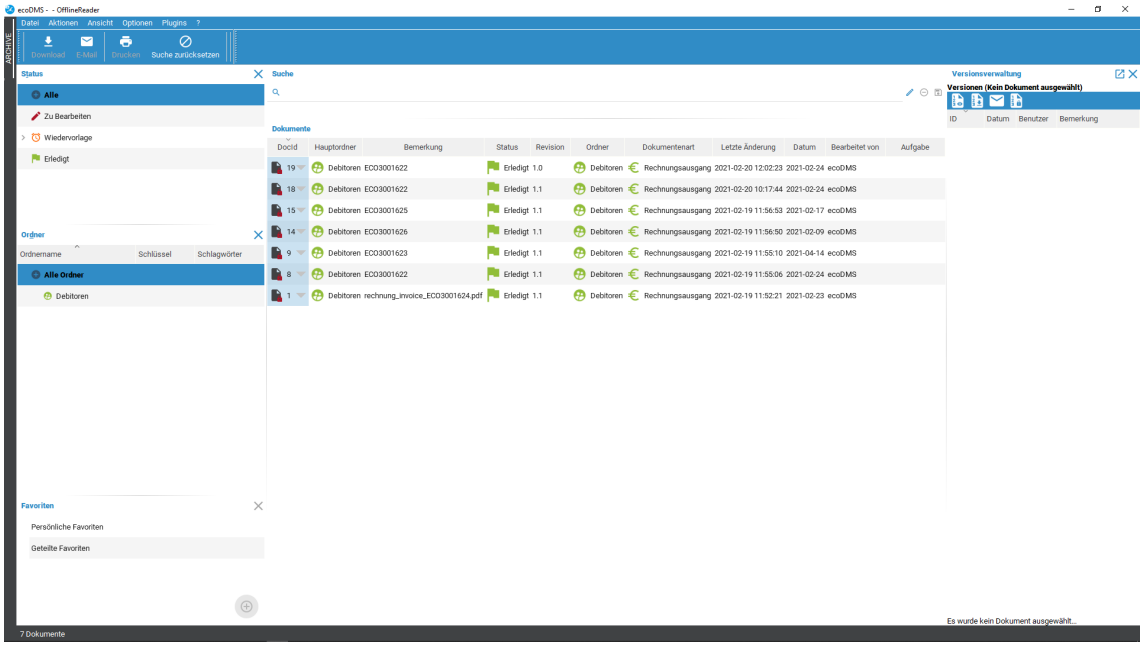


Figure 15.19: Example for an ecoDMS Offline Client (Data Export Plugin)

16 Search, Filters, and Favorites

For quickly finding archived documents, ecoDMS offers various search and filter options. The combination of folder structure, classification, and OCR full-text search enables targeted access to documents without having to click through rigid folder structures. Recurring search queries can also be saved as favorites.

How Indexing Works:

- **Automatic OCR recognition:** ecoDMS automatically performs full-text indexing for all readable documents.
- **Format conversion:** File formats that are not directly readable (e.g., JPG, PNG, TIFF, or image-based PDFs) are automatically converted into searchable PDF/A files whenever possible.
- **Captured data:** In addition to the body text, the system simultaneously indexes all metadata, classification attributes, and notes.
- **System limits:** The accuracy of text recognition depends on the resolution, formatting, and alignment quality of the source file. A 100-percent recognition rate cannot be technically guaranteed.

16.1 Full-Text Search

Full-text search forms the central tool for document research in ecoDMS. Since the system indexes both the body text via OCR as well as metadata, classification attributes, and notes in the background during archiving, manual searching through rigid folder structures is no longer necessary. Entering a search term into the search field searches all document contents and classifications simultaneously.

Preview Display:

- Recognized search terms are highlighted in color in the preview window.
- If a term occurs multiple times, the preview window lists all text occurrences (s. 15.6).
- Please also note how indexing works under 16.

16.1.1 Simple Full-Text Search

1. Enter the search terms in the search field:

```
Rechnung Musterfirma
```

2. Press Enter.

3. ecoDMS displays all documents containing the entered terms.

Note: If multiple words are entered without operators, ecoDMS automatically links them with an AND condition.

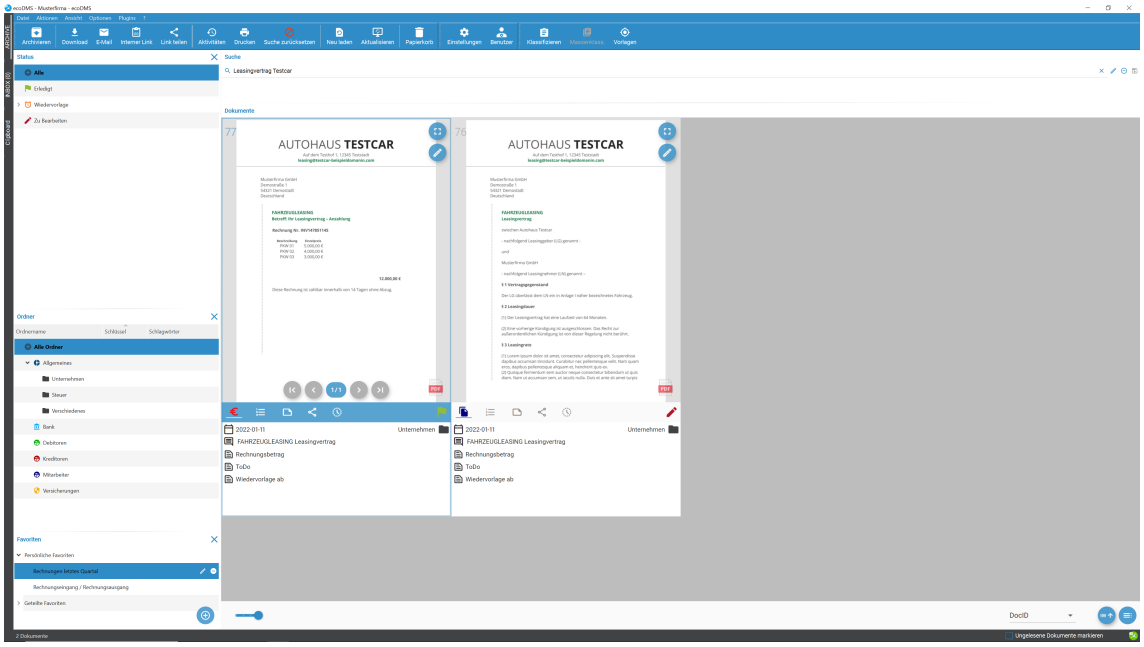


Figure 16.1: Example of Simple Full-Text Search (Card View)

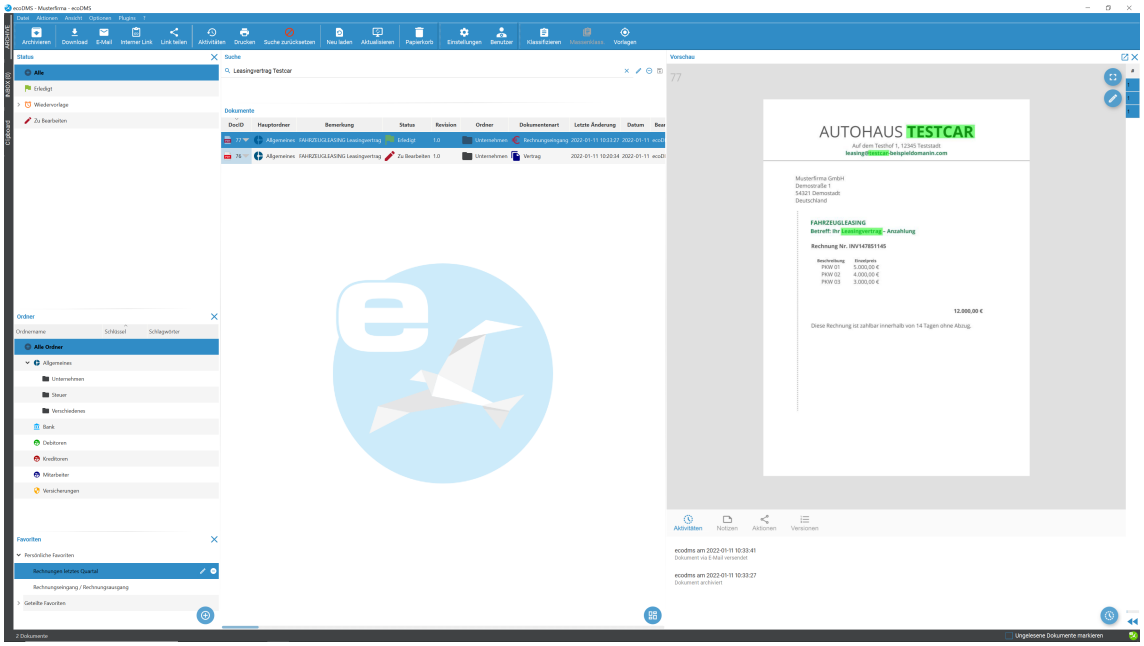


Figure 16.2: Example of Simple Full-Text Search (Table View and Activated Preview Window)

16.1.2 Placeholders / Wildcard Search

Placeholders replace single or multiple characters in cases of unclear spelling or variable word endings.

1. Enter the search term with the desired placeholders into the search field.
    a) Question mark (?)
        i. Syntax: Replaces any single character
        ii. Example:

```
Me?er
```

        iii. Functionality & Hits: Finds e.g., Meier, Meyer, Mejer
    b) Asterisk (*)
        i. Syntax: Replaces any number of characters
        ii. Example:

```
RN26*
```

        iii. Functionality & Hits: Finds words starting with this prefix, e.g., RN26001, RN26089
2. Press Enter.
3. ecoDMS displays all documents matching the entered criteria.

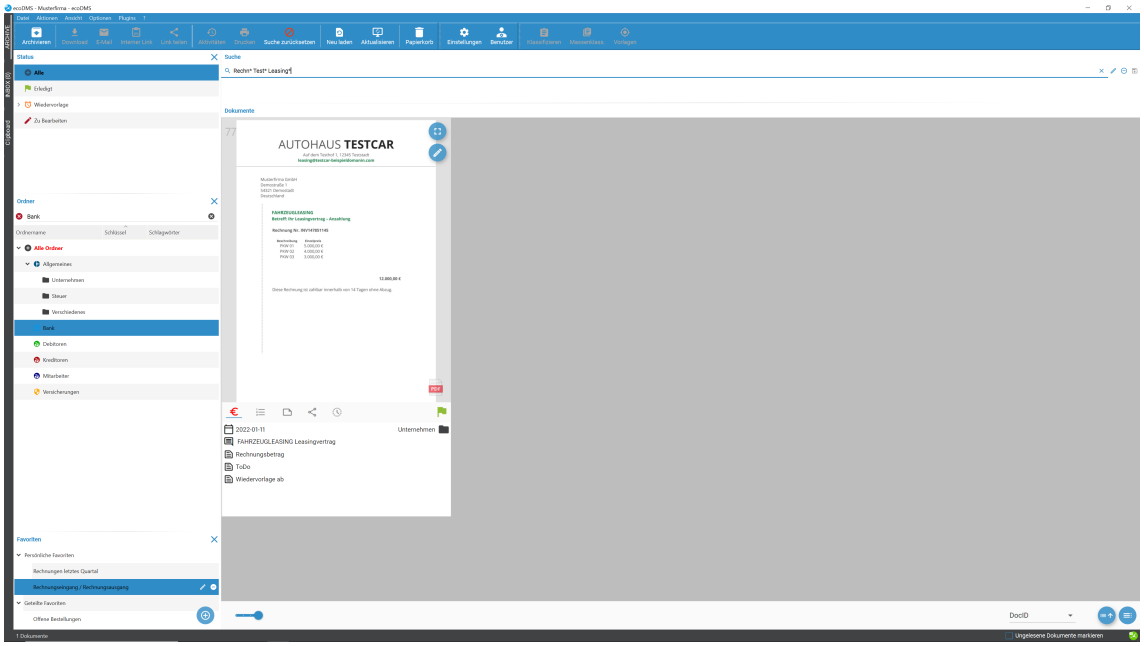


Figure 16.3: Example of Wildcard Full-Text Search (Card View)

16.1.3 Fuzzy Search: Fuzzy Search

Fuzzy search accounts for variations in spelling as well as character deviations from OCR recognition.

1. **Tilde symbol (~):** Place a tilde (~) directly at the end of the search term:

```
Meier~
```

2. Press Enter.

3. ecoDMS displays results that resemble the entered term (e.g., Meier, Meyer, Maier).

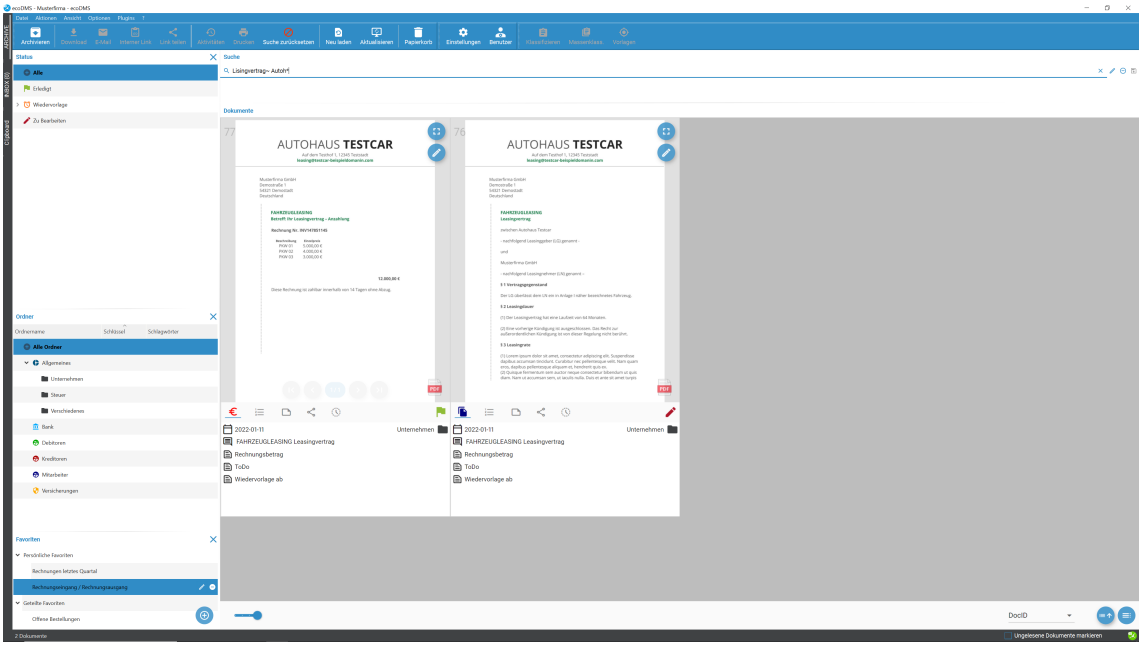


Figure 16.4: Example of Fuzzy Full-Text Search (Card View)

16.1.4 Boolean Operators

Use Boolean operators to combine or specifically exclude search terms. Operators must be entered in capital letters.

1. Enter the search terms with the desired operators into the search field.
   a) AND (or +): AND connection
      - Syntax: Compulsorily links two or more terms together.
      - Example:

```
Sample AND Demo
```

      - Alternative:

```
+Sample +Demo
```

      - Functionality & Hits: Finds only documents that contain both the term Sample and the term Demo.

   b) OR: OR connection
      - Syntax: Links terms alternatively with each other.
      - Example:

```
Sample OR Demo
```

- Functionality & Hits: Finds documents that contain at least one of the two terms (Sample or Demo).

a) NOT (or -): Exclusion

- Syntax: Excludes subsequent terms from the search results. The minus sign is placed directly in front of the word to be excluded.
- Example:

```
Sample NOT Demo
```

- Alternative:

```
Sample -Demo
```

- Functionality & Hits: Finds documents containing the term Sample, but excludes all documents that additionally contain the word Demo.

2. Press Enter.
3. ecoDMS displays all documents matching the entered criteria.

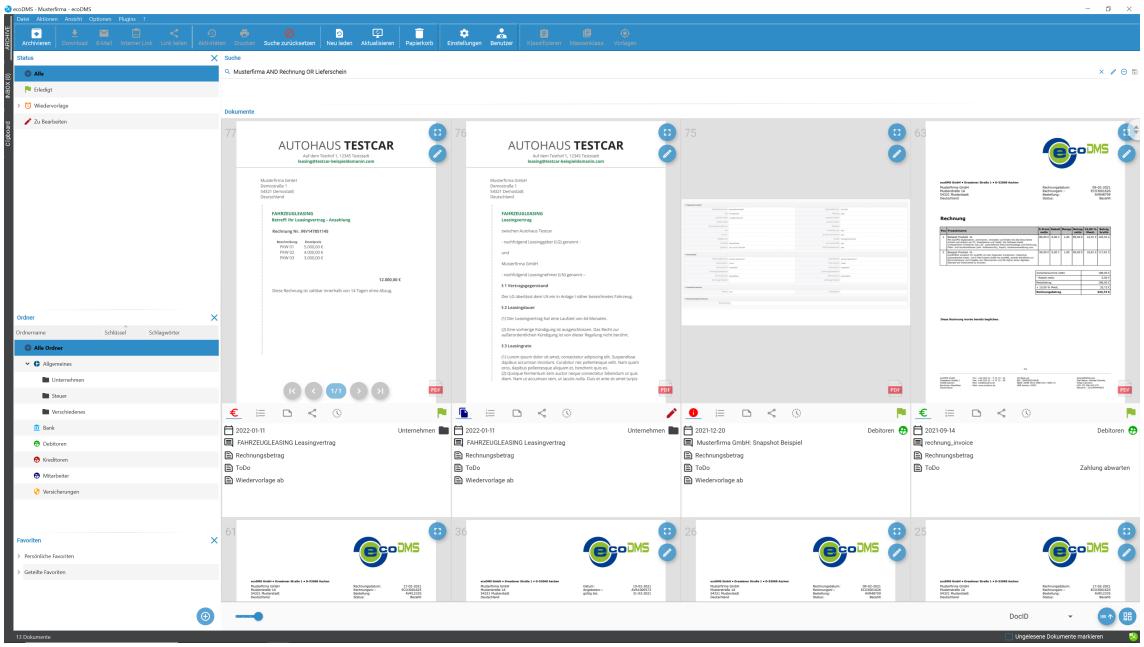


Figure 16.5: Example of Full-Text Search with Boolean Operators (Card View)

16.2 Advanced Search

The Advanced Search allows you to use a variety of values for your search query in ecoDMS. You can use all available classification attributes, highlight colors (PDF Editor) and the full-text search.

16.2.1 Enter Search Criteria and Start Search

1. Click the Edit icon to the right of the search box to open the Advanced Search dialog (dialog name: Edit Search)
2. Enter your search criteria. The following fields are available:
   a) **Field:** Displays all searchable attributes and values you can select. Select an entry from the list.
   b) **Operator:** Specify the operator for the search. Depending on the field, the operators you can select vary. The following operators are available:
      i. contains
      ii. does not contain
      iii. greater / equal
      iv. greater than
      v. is
      vi. is not
      vii. smaller / equal
      viii. smaller than
   c) **Value:** Defines the search criterion in detail. Select from the values belonging to the "field" (e.g. the folder tree or a list of all document types)
   d) **Icon (Multiple Selection):** Depending on the attribute, this feature allows you to select several values and inserts them as OR operation into the search query
      i. In the multiple selection dialog, click "Add value" to add further values in the form of an OR operator
      ii. Confirm your selection with "OK" or abort the process with "Cancel"

> Example multiple selection:
> Search for the document type "Incoming Invoice" **OR** "Outgoing Invoice" **OR** "Invoice Correction".

3. To add more search criteria, click the "Add Criterion" button. ecoDMS then inserts a new row for your search query. This is an "AND" operator.

> Example for combining several rows with the AND operator:
> **Row 1:** Search for the document type "Incoming Invoice" OR "Outgoing Invoice" OR "Invoice Correction".
> **AND**
> Row 2: Status of the document is "To Do"
>
> Results: ecoDMS only displays documents whose document type is **either** "Incoming Invoice" **or** "Outgoing Invoice" **or** "Invoice Correction" **or** whose status is "To Do".

4. Click "OK" to start the search. To cancel, click "Cancel".

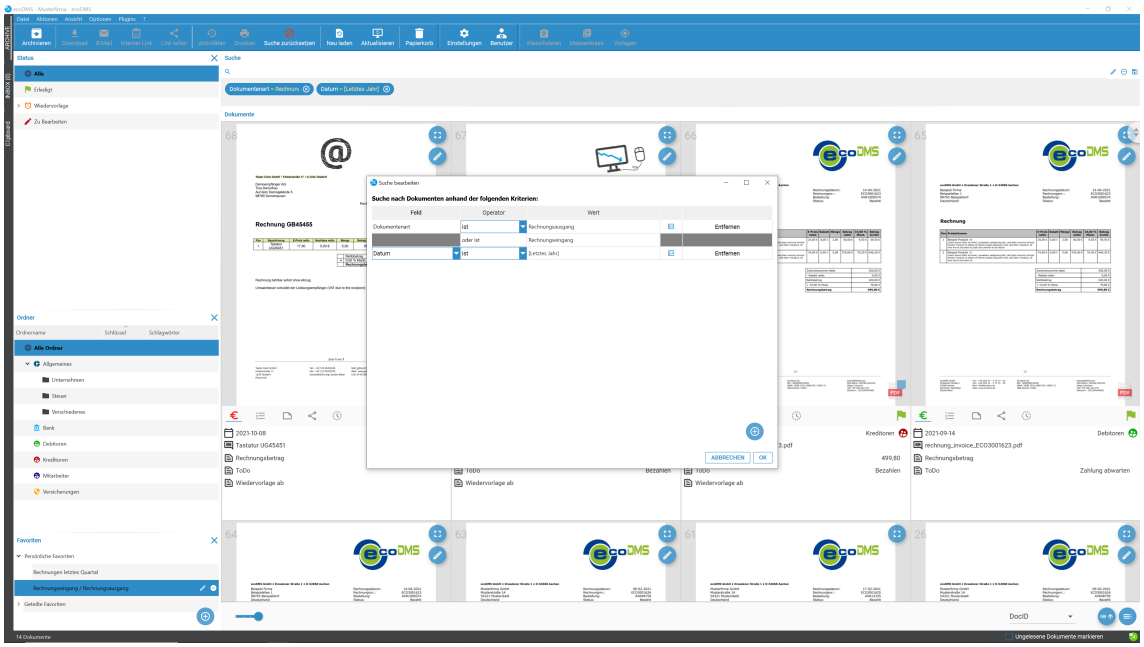


Figure 16.6: Advanced Search - Example for Assigning Search Criteria (AND + OR Operators)

16.2.2 Remove Search Criteria

1. Open the Extended Search dialog.
2. Select the search line you want to delete.
3. Click on the corresponding "Remove" button.

16.3 Favorites

You can save recurring search queries as favorites. Click a favorite to search with the saved criteria. The favorites are saved by default for personal use in the "Personal Favorites". Administrators can also create and save global search queries. These are shared with specific users or groups in the "Shared Favorites". In addition, you can use the favorites as a basis for data export and load them in the Data Export plugin dialog.

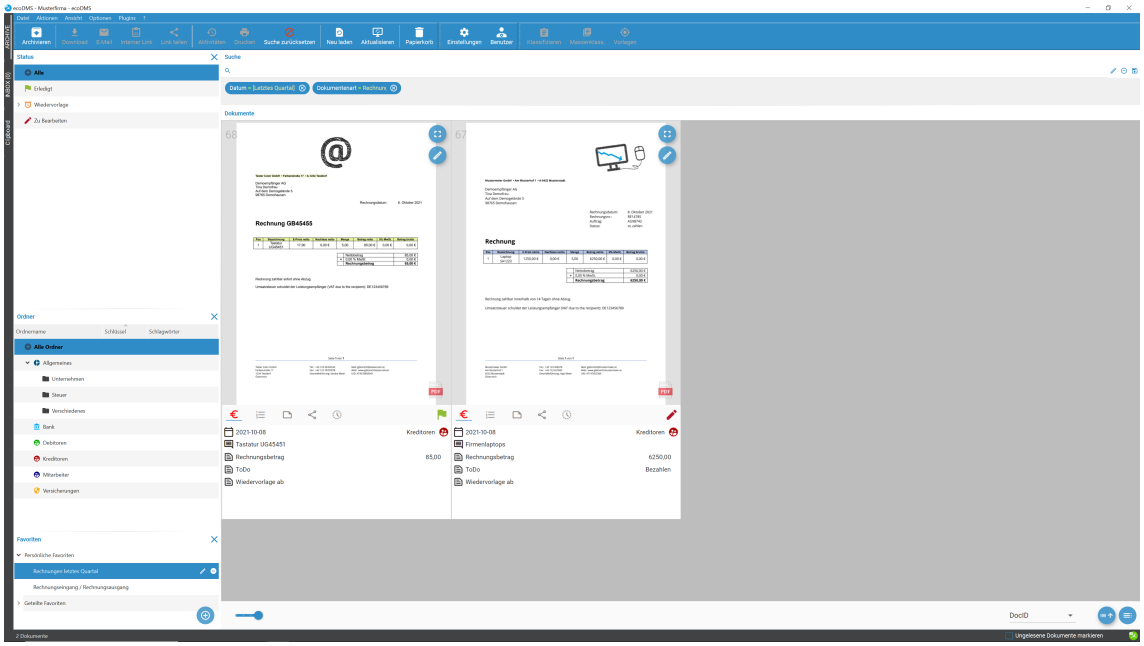


Figure 16.7: Favorites - Saved Search Queries

16.3.1 Personal Favorites

Create a search query using one of the following steps:

1. Click the Edit icon to the right of the search box to open the "Edit search" dialog
   a) In the "Favorites" window, click the "Create New Favorite" icon to open the "New Favorite" dialog
   b) Enter the search criteria as described for the Advanced Search
2. To confirm your entry, complete the following steps:
3. **Via the Edit icon ("Edit Search" dialog)**
   a) Click "OK" to start the search
      i. Now click the "Save as Favorite" icon to the right of the search line
   b) **Via the Favorites window ("New Favorite" dialog)**
      i. Click "Apply" or "OK"
4. Now enter a name under which you want to save the favorite
5. Confirm your entry with "OK" to save the entry in the "Personal Favorites", or abort the process with "Cancel"

16.3.2 Shared Favorites

Administrators can create search queries and make them available as shared favorites to specific users or groups.

1. In the "Favorites" window, click the "Create New Favorite" icon to open the "New Favorite" dialog
2. Enter the search criteria as described for the Advanced Search

3. Enable the checkbox for the "Show permissions" area
4. Drag the users and/or groups, with whom you want to share the search query in the "Shared Favorites", into the "Assigned Roles" area
5. Click "Apply" or "OK" to confirm your entry
6. Now enter a name under which you want to save the favorite
7. Confirm your entry with "OK" to save the entry in the "Personal Favorites" for the selected users / groups, or abort the process with "Cancel" without saving

16.3.3 Edit Favorites

- You can edit personal favorites.
- Shared filters can only be edited by the responsible administrator.

1. Select an entry in the "Favorites" window
2. Click the "Edit Favorite" icon
3. Make your edits
4. Confirm your entry with "OK" to save the entry, or abort the process with "Cancel"

16.3.4 Delete Favorites

- You can delete personal favorites.
- Shared filters can only be deleted by the responsible administrator.

1. Select an entry in the "Favorites" window
2. Click the "Delete Favorite" icon
3. Confirm the "Delete Favorite" message box with "Yes" or abort the process with "No"

16.4 PDF Highlight Tracking

Use the Advanced Search to find documents with highlight colors that were created with the PDF Editor. You can include the highlight colors when you open the search. For more information, please read the short description in this manual in section 18.5.4.

16.5 Dynamic Date Search

To allow a simplified, date-based search, ecoDMS provides predefined searches in Advanced Search and Favourites Search.

You can select the following parameters for the search:

- Yesterday
- Today
- Tomorrow
- Last Week
- This Week
- Next Week
- Last Month
- This Month
- Next Month
- Last Quarter
- This Quarter
- Next Quarter
- Last Year
- This Year
- Next Year

To include the dynamic date search in your search query / favourites, complete the following steps:

1. Open the Advanced Search window or the Favourites window.
2. Select the "Date" field and an operator (default: "IS")
3. Click into the"Value" box.
4. The calendar opens
5. In the "Dynamic Date" field, select a parameter from the drop-down list
6. ecoDMS now highlights the selected period in Color in the calendar
7. Confirm your selection with "OK" or abort the process with "Cancel"
8. ecoDMS saves the selected parameter as a value, which you can use for a search

a) If you save the dynamic date search as a favourite, ecoDMS automatically adjusts the selected period
b) Periods, e.g. the last quarter, always remain up-to-date when using a favourite
c) If, for example, you use the filter "Last Quarter"
    i. in April, ecoDMS displays the results from January to March
    ii. in August, ecoDMS displays the results from April to June

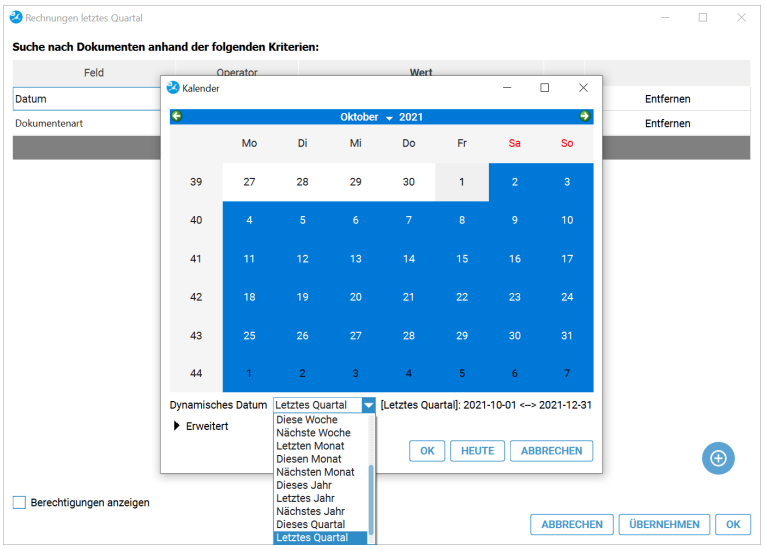


Figure 16.8: Dynamic Date Search: Select Parameters

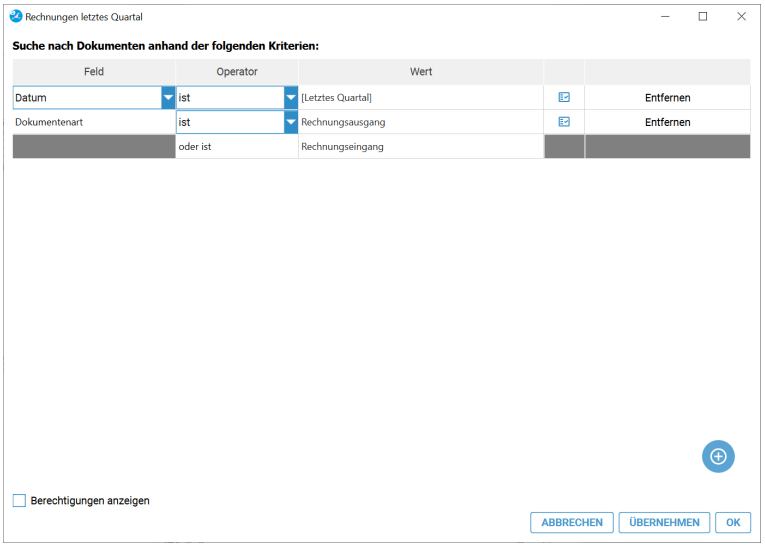


Figure 16.9: Example of a Favourite with Dynamic Date Search (Here: Invoices From the Last Quarter)

16.6 Shortcut Search

Use a user-defined keyboard shortcut in the Connection Manager (see 5.6) to start the full-text search from any application (e.g. from a webpage, an enterprise resource planning system, an email, etc.). To do so, simply highlight the search terms in the corresponding programme and then enter the user-defined keyboard shortcut. Entering the shortcut automatically starts the full-text search in ecoDMS. The system searches through the archived documents for the selected terms. The matching documents immediately display in ecoDMS.

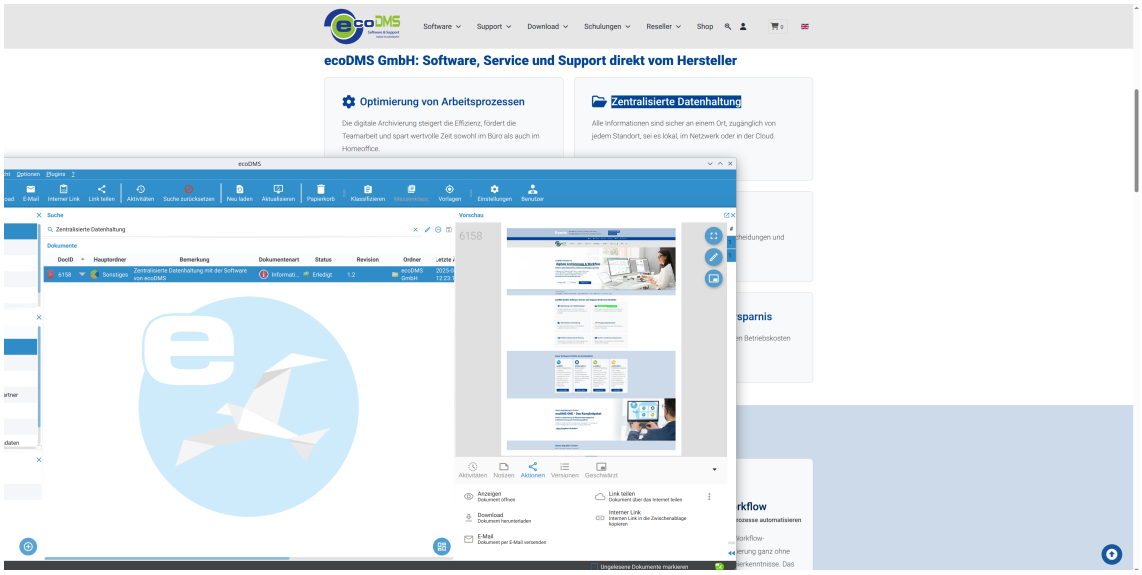


Figure 16.10: Example of a shortcut search:
The terms "Centralized Data Storage" are highlighted on a website and passed to the full-text search in ecoDMS using the example shortcut "Ctrl + Alt + G".

16.6.1 Change Shortcut

You can create an individual shortcut for each profile in the Connection Manager. Complete the following steps:

1. Open the Connection Manager.
2. Enter the desired shortcut in the "Shortcut Search" field.
3. Save the profile.

16.6.2 Reset Shortcut

To reset your shortcut, complete the following steps:

1. Open the Connection Manager.
2. Click "Reset" in the shortcut line.
   a) ecoDMS clears your input, so you can enter a new shortcut.
3. Save the profile.

16.6.3 Execute Search Shortcut

1. Select a search term (e.g. on a website, in the enterprise resource planning system, etc.)
2. Type in the ecoDMS shortcut you specified
3. The selected search term populates the full-text search in ecoDMS

16.7 Filter by Status

You can filter documents by status in the "Status" window in ecoDMS.

- For example, if you click the "To Do" status, only documents with this status display.
- **You can combine this filter with more filters in any way you like.**

16.8 Filter by Folder

You can filter documents by folder in the "Folders" window in ecoDMS.

-

The system has the following default statuses:
–All: Displays all results, regardless of their status, and overrides any filters that may have been set in the status window
–Done: Displays results with the status "Done" set in the classification
–Resubmission: Displays results with the status "Resubmission" set in the classification
–Expired: Displays results with the status "Resubmission" set in the classification and whose resubmission date has already been reached or has expired
–Next 7 days: Displays results with the status "Resubmission" set in the classification and whose resubmission date lies within the next 7 days
–To do: Displays results with the status "To Do" set in the classification

For example, if you click the fictitious main folder "Debtors", all documents assigned to this main folder display. This also includes documents from the associated subfolders.

- **You can combine this filter with more filters in any way you like.**

- **All folders:** Displays all results, regardless of their folder association, and overrides any filters that may have been set in the folder tree
- You can also search for folders within the folder tree (refer to the chapter Browse Folder Tree)

16.8.1 Browse Folder Tree

You can browse the folder tree almost everywhere:

- "Folder" window
- Classification dialog
- Table view
- Settings...

The folder tree can contain various values. As an option, you can assign individual keys and keywords to each folder. If you are looking for a folder, you can use the folder name, the key and the keywords as search criteria. To do so, you have the following options:

1. Simply enter the search term anywhere within the folder tree. It can consist of letters and/or numbers.
2. An input field appears in the overview. When you start entering your search term, the system automatically suggests matching documents. The search includes folder names and their keys, as well as keywords.
3. You can continue the folder search with "F3".

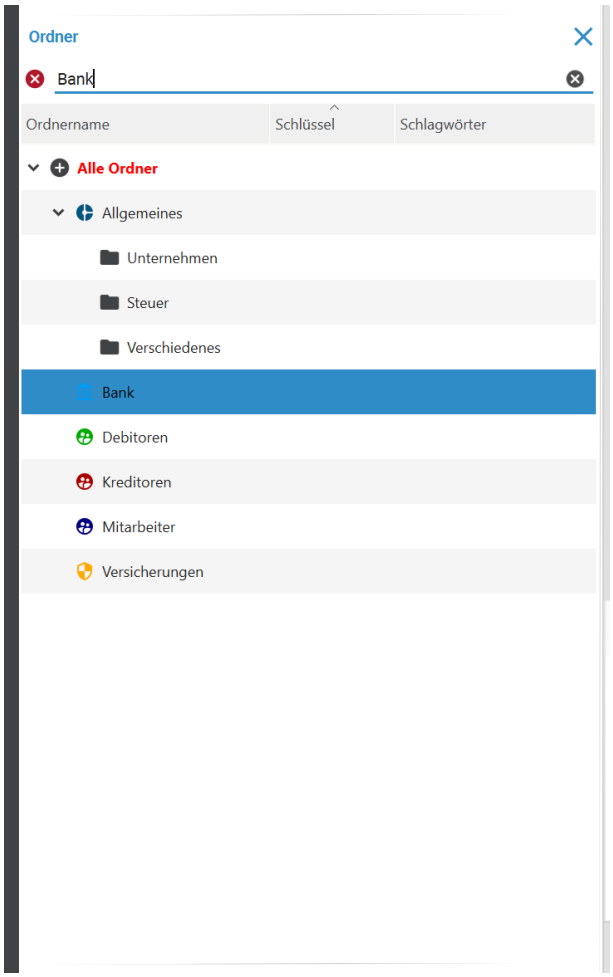


Figure 16.11: Window - Select Folder (Search)

16.9 Stop Search Query

- You can delete search criteria specified in the "Search" area by clicking the "Delete search" icon.
- Remove text in the full-text search of the "Search" area by clicking the "x" to the right of the search terms (Function name: Delete Text, only visible if entries are in the search box)
- To reset all active filters (e.g. full-text search + status + folder), click the "Reset search" icon on the toolbar

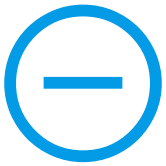


Figure 16.12: Icon - Delete Search (to the Right of the Search Box)



Figure 16.13: Icon - Reset Search

17 Version Management

ecoDMS allows you to archive any number of document versions. This means that the original persists. As an option you can add a comment to each version.

- To access version control, you require a system permission: "**use version control. = ecoSIMSVERSIONING**"
- Editing, writing a version note and creating further versions is only possible if you have permission to classify this document.
- Please note that you cannot create further versions of a finalised document.
  - A document must be enabled for versioning from the beginning.
- Each version is stored individually within version control.
- The latest or finalised version always opens and displays in the preview
- Original files and any available PDF/A files can be stored in the version control
  - PDF/A files are automatically created when archiving PDF, TIFF, JPG and PNG files
  - Moreover, the ecoDMS Office and email plugins generate a PDF in addition to the original file during archiving
  - ecoDMS opens the PDFs (if available) and displays them in the preview
  - The quality and size of a file determine the duration and feasibility of the conversion to the PDF/A format
  - After successful conversion, users can access both the original and the searchable PDF/A through version control

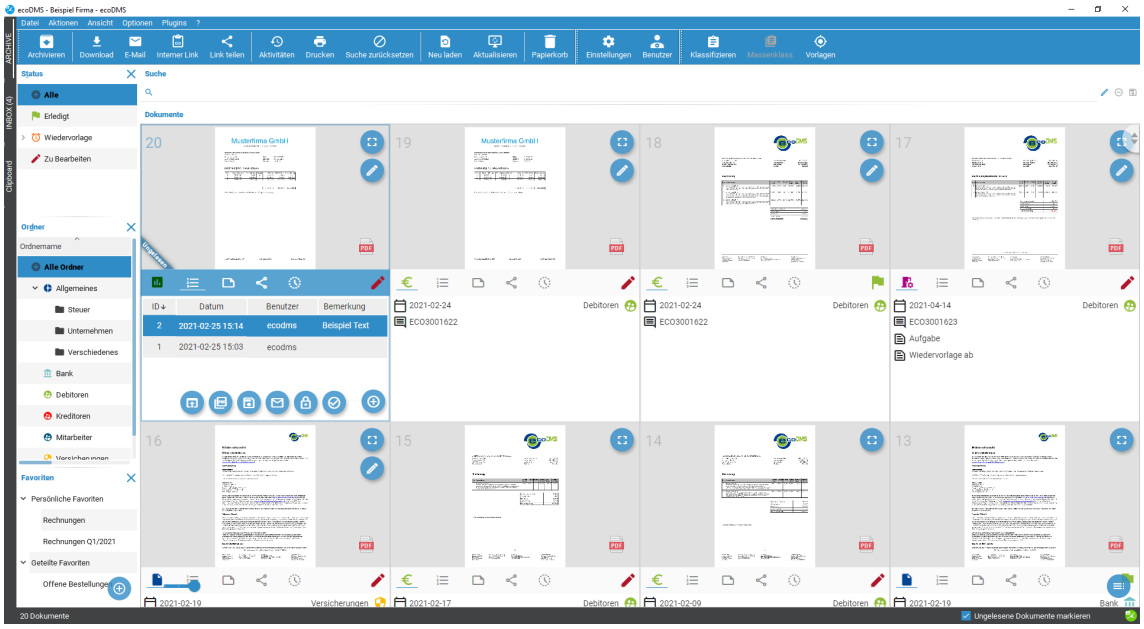


Figure 17.1: Versions of a Document (Here: Card View)

17.1 Create Initial Version

Please refer to the chapter "Archiving -> Archive File(s) as Version".

17.2 Add New Version

To add a new version to the document, ecoDMS provides various options:

1. Select the respective document in ecoDMS
   a) Click the "Add New Version" icon on the "Versions" tab
   b) Select a file in the file system and click "Open"
2. If the document was archived with an Office plugin, complete the following steps:
   a) Select the respective document in ecoDMS
   b) On the "Versions" tab, click the version you want to edit
   c) Now edit the document in Office and save it in Office with the ecoDMS button (refer to the corresponding plugin chapter in this manual for more details).

17.3 Comment

You can add comments to each version. You can create these short texts either directly through version management or - when archiving via the Office Plugins - through the classification dialog.

1. 1. Select the respective document in ecoDMS 2. Click to select the "Comment" field for the version you want to comment on 3. Enter the comment 4. Confirm your entry with "Enter"

17.4 Open Version

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

1. Select a document
2. Now select the version on the "Versions" tab
3. Click the "Open Version" icon
    a) If there is also a PDF next to the original file, ecoDMS also displays the "Open PDF Version" icon

17.5 Export Version

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

1. Select a document
2. Now select the version on the "Versions" tab
3. Click the "Export" or the "Export Version" icon
    a) If there is also a PDF next to the original file, ecoDMS displays two different options when you click the export icon:
        i. Export version -> Original file
        ii. Export PDF version -> PDF
4. Select the destination path in the file system dialog and start exporting
5. If you are using Windows as your operating system, you can now rename the file
6. Confirm the file export with "OK"

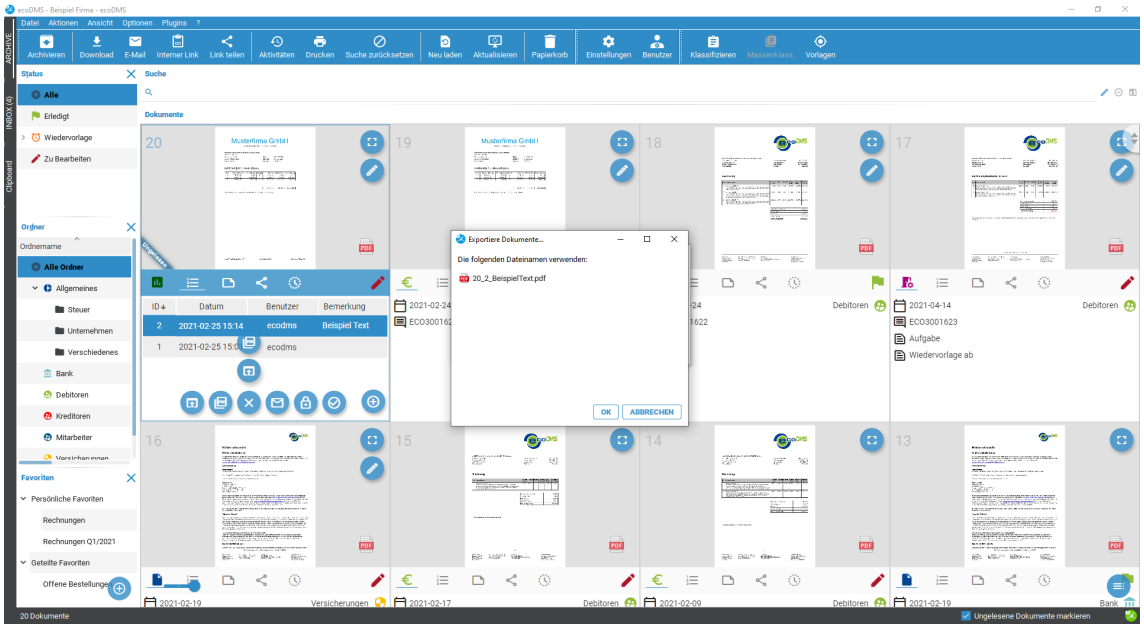


Figure 17.2: Export Version and Rename File (Here: Card View)

17.6 Send Email

You can send the PDF version (or, if not available, the original file) via email. To do so, complete the following steps:

1. Select

- Depending on the application, you cannot send attachments directly from ecoDMS. This is not an error in ecoDMS. For more information on this topic for Ubuntu, please refer to https://bugs.launchpad.net/ubuntu/+source/xdg-utils/+bug/1019259. As a workaround, the administrator can deposit a script for opening the mail client in the settings dialog, where it is available for all users (c.f. "Settings" chapter).
- You can only rename the email attachment before sending if you have a Windows client.

   a document

2. Now select the version on the "Versions" tab
3. Click the "Send Document via Email" icon
4. If you are using Windows as your operating system, you can now rename the file
   a) To rename a file, simply double-click the name, enter the new name and confirm with "Enter"
   b) Confirm your entries with "OK" to continue, or abort the process with "Cancel"
   c) ecoDMS opens the default email programme of your computer and attaches the file in the message window

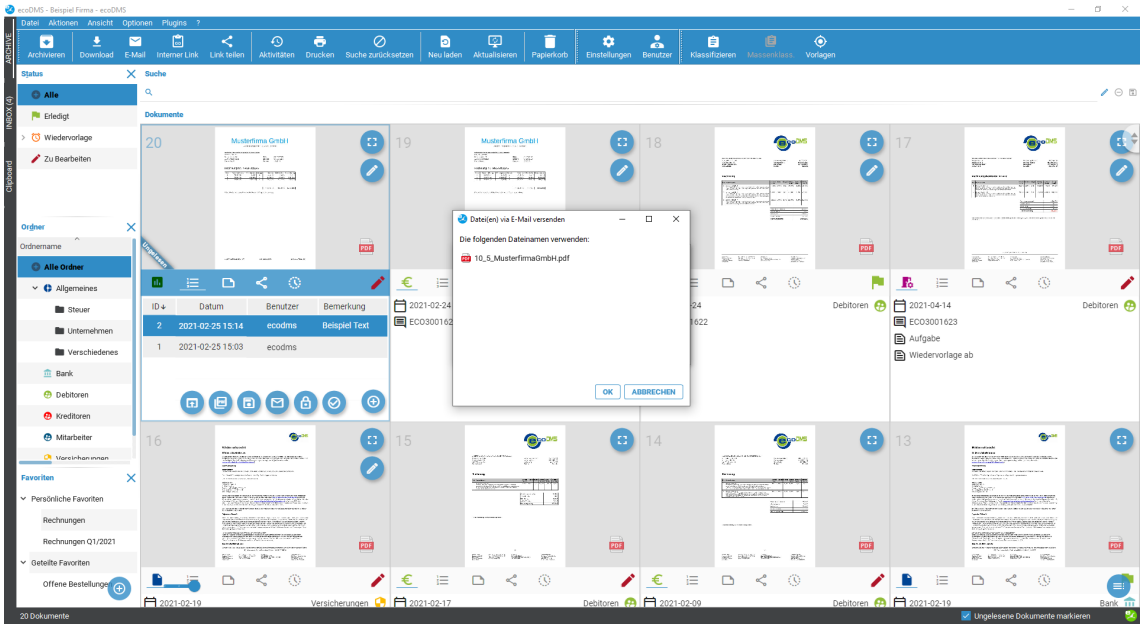


Figure 17.3: Send Version via Email and Rename File (Here: Card View)

17.7 Finalise Document (Version)

To finalise work on a document and prevent the addition of further versions, use the "Finalise Document" function. Finalising a document cannot be undone.

1. Select a document
2. Select the final version on the "Versions" tab
3. Click the "Finalise Document" icon
4. The selected version - unless it is the latest version - is stored as the main version of the document. This version also displays in the preview of the document, for example. You cannot add another version.

17.8 Check-Out Document

To prevent several users from working on a document simultaneously and saving different versions, ecoDMS includes a so-called check-in and check-out process. As long as a document is locked, other users can continue to access the versions but cannot save any new versions.

1. Select a document
2. Select a version on the "Versions" tab
3. Click the "Check-Out Document" icon
    a) Other users cannot add new versions to the document until you check-in the document.

17.9 Check-In Document

To prevent several users from working on a document simultaneously and saving different versions, ecoDMS includes a so-called check-in and check-out process. As long as a document is locked, other users can continue to access the versions but cannot save any new versions. You need to check-in the document again to enable editing for other users.

1. Select a document
2. Select a version on the "Versions" tab
3. Click the "Check-In Document" icon
    a) Other users can now file new versions again

18 PDF Editor, Annotations, Highlight Colors, Highlight Report

- This feature requires a license for the full version of ecoDMS, but you can test it in the trial version. This feature is not enabled in the Free4Three version.
- Start the PDF Editor from the document preview:
  - Preview in the Cards view
  - Preview in a separate preview pane
- To edit a file in the PDF Editor,
  - there must be a preview of the document in ecoDMS (PDF)
  - the document must be enabled for classification for the respective user
  - new versions can be added to the document (document is not finalised)
  - the user has the permission to archive, classify, and create and manage versions of documents
- The continuation mode (Scroll pages) is enabled by default in the PDF editor: The most recent setting is saved for each user and client installation.

Use the PDF editor in ecoDMS to edit PDF documents that are archived in ecoDMS. This also includes documents that ecoDMS converted to PDF, for example, image files, Office documents, or documents that were created with a PDF printer. The following features are available:

- Add annotations, for example, time stamps or images
- Highlight text in different colors (text marker)
- Highlight any areas with colors
- Generate highlight reports

All modifications with the PDF editor are saved in a new version of the document. The original document remains unchanged. This ensures you can access earlier document versions at any time.

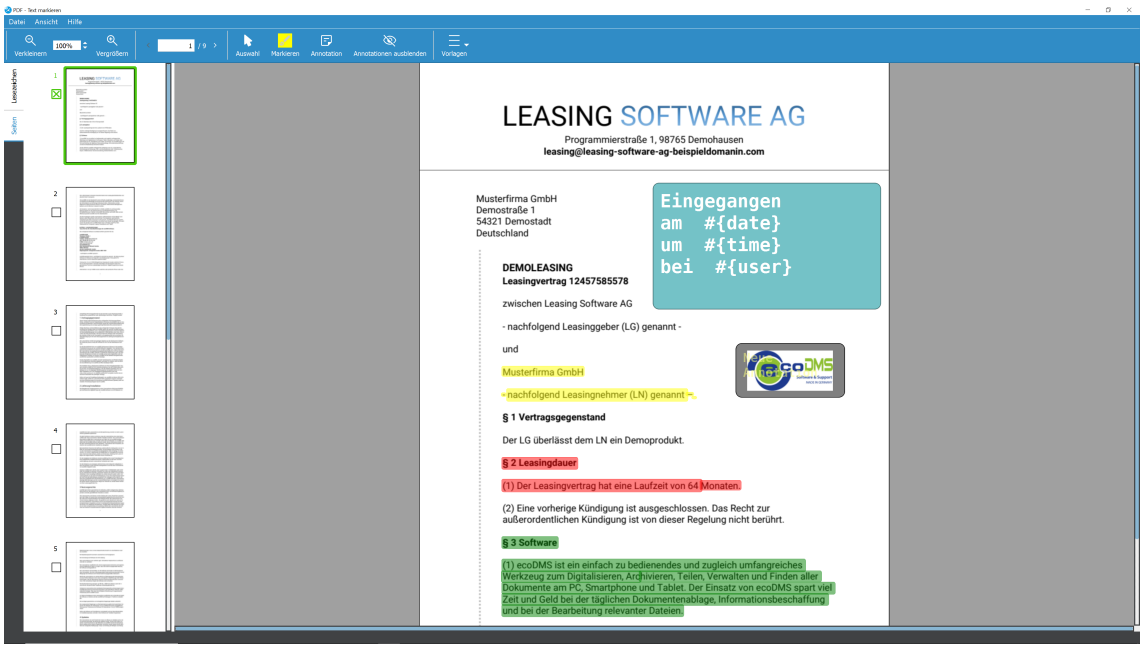


Figure 18.1: PDF Editor with Sample Annotations and Highlight Colors

18.1 Open PDF Editor

To edit a file in the PDF Editor,

- there must be a preview of the document in ecoDMS (PDF)
- the document must be enabled for classification for the respective user
- new versions can be added to the document (document is not finalised)
- the user has the permission to archive, classify, and create and manage versions of documents

If the requirements for using the PDF editor are met, an "Edit PDF" icon displays in the preview (Card View and Preview Pane).

1. To open the PDF Editor, click the "Edit PDF" icon.

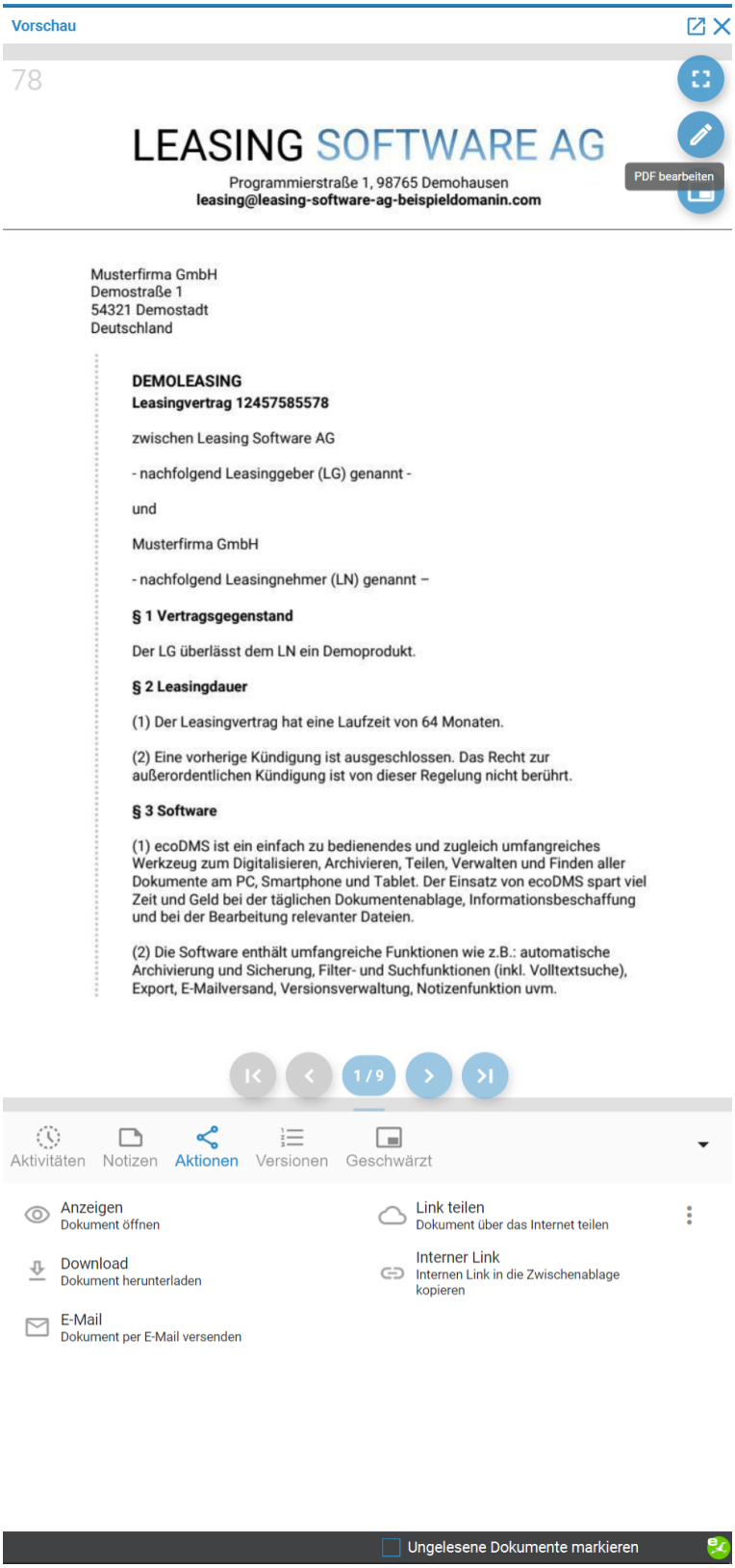


Figure 18.2: Open PDF Editor (here: Preview Pane)

18.2 Save PDF

After editing the PDF, complete the following steps to save it:

1. Click "File - Save and Quit" in the header menu of the PDF Editor.
    a) Alternative keyboard shortcut: CTRL+ Q
2. ecoDMS creates a new version for this document and saves this file as a PDF in the archive.
3. The original file also remains in the version control system.

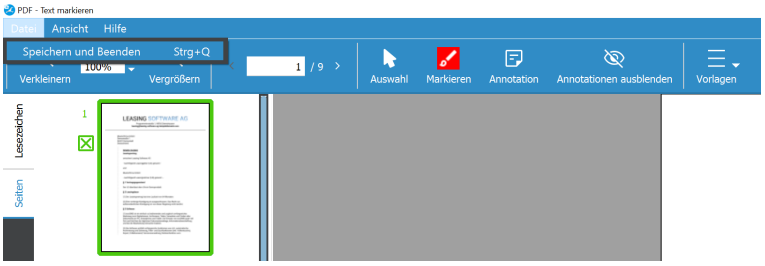


Figure 18.3: PDF Editor: File - Save and Exit

18.3 Continuation Mode (Scroll Pages)

- The continuation mode (Scroll pages) is enabled by default in the PDF editor: The most recent setting is saved for each user and client installation.
- If this feature is NOT enabled, you must click each page of a multi-page document to scroll.

The continuation mode allows you to scroll pages within a document. To enable or disable the feature:

1. Click "View" in the Header Menu of the PDF editor.
    a) Enabled: Check "Continuation mode"
    b) Disabled: Un-check "Continuation mode"

18.4 Annotations

- All users with document and PDF Editor permissions can remove, edit or add to the annotations.
- You cannot edit encrypted documents in the PDF Editor.

Use the PDF editor to apply user-defined annotations. These can include, for example, comments with individual text, images, timestamps or user information.

18.4.1 Create New Annotation

1. In the PDF Editor, click "Annotation" to insert a new field (a new virtual stamp) into the document.
   a) You can add any number of annotations.
2. Enter your content. You can use your own text, placeholders, colors and background images.
   a) The size of the field automatically adjusts to the content.
   b) You can also resize the box manually by moving the edges of the box.

18.4.2 Appearance

You can choose the appearance of an annotation.

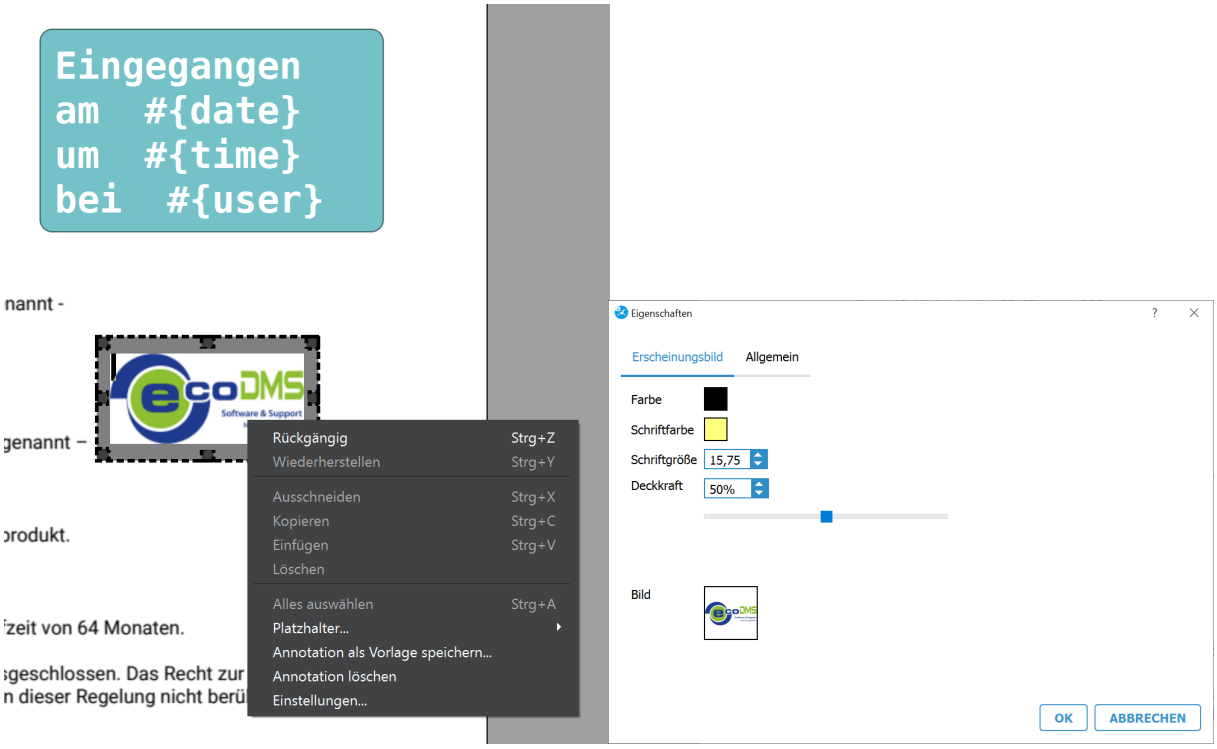


Figure 18.4: PDF Editor: Configure Annotation Appearance (Right-click - Preferences)

18.4.2.1 Font

To configure the font color and the font size, complete the following steps:

1. Right-click the annotation.
2. Select "Preferences".
3. In the "Properties" window, make the settings on the "Appearance" tab.

a) Font color: Select the font color in the Select Color dialog box.

b) Font size: Enter the font size or select the font size using the arrow keys in the input box.

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

18.4.2.2 Background Color

To modify the background color of the field, complete the following steps:

1. Right-click the annotation.
2. Select "Preferences".
3. In the "Properties" window, make the settings on the "Appearance" tab.
   a) Color: Select the color in the Color dialogue box.
4. Confirm your selection with "OK" or abort the process with "Cancel".

18.4.2.3 Background Image

> The following file types are permitted: .jpg, .jpeg, .png and .bmp

You can add a background to an annotation. This way you can create virtual stamps with a custom image.

1. Right-click the annotation.
2. Select "Preferences".
3. In the "Properties" window, make the settings on the "Appearance" tab.
   a) Pixmap: Select an image from your drive.
4. The file is now in the background of the annotation.
   a) You can also resize the field and the background image manually by moving the edges of the box
   b) The background image automatically resizes to fit the size of the field
5. Confirm your selection with "OK" or abort the process with "Cancel".

18.4.2.4 Opacity

To modify the opacity of the field (background and font), complete the following steps:

1. Right-click the annotation.
2. Select "Preferences".
3. In the "Properties" window, make the settings on the "Appearance" tab.
   a) Opacity: Enter the opacity as a percentage (%) or select the opacity using the arrow keys in the input box.
4. Confirm your selection with "OK" or abort the process with "Cancel".

18.4.3 Placeholder

1. Right-click the annotation.
2. KlickClick "Placeholder"
3. You can add the following placeholders to an annotation:
   a) User
   b) Date
   c) Time
4. Save the edited document in the PDF editor. ecoDMS automatically populates the appropriate values and displays them in the preview of the new version.

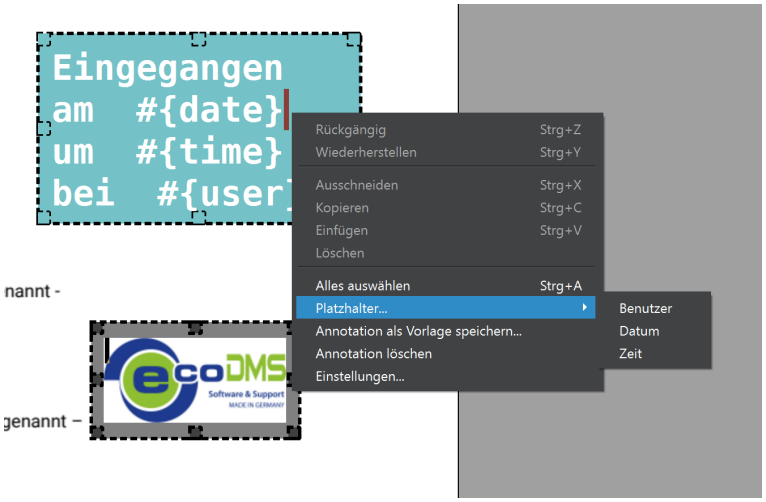


Figure 18.5: PDF Editor: Right-click - Placeholder

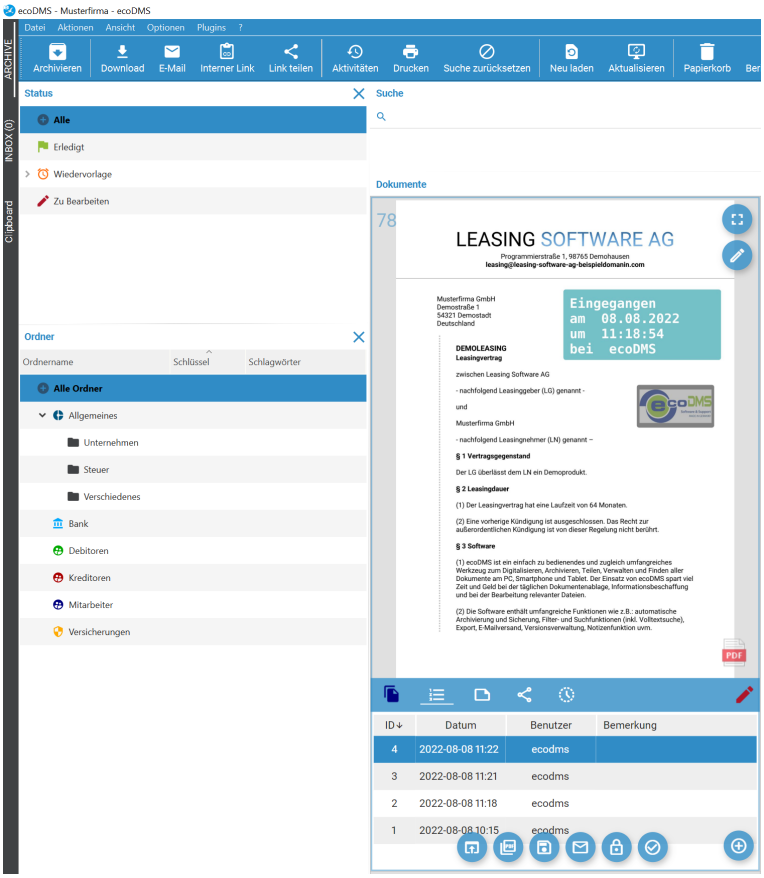


Figure 18.6: PDF Editor: Saved Annotations with Populated Placeholders (here: Preview Pane)

18.4.4 Templates

- All users with access to the PDF Editor can create, view, use and edit templates
- Examples for templates are:
  - Paid on <Date> at <Time> by <User>
  - Reviewed on <Date> at <Time> by <User>
  - Shared on <Date> at <Time> by <User>

You can save recurring annotations as a template for all users with access to the PDF Editor. You can also save virtual stamps, for example.

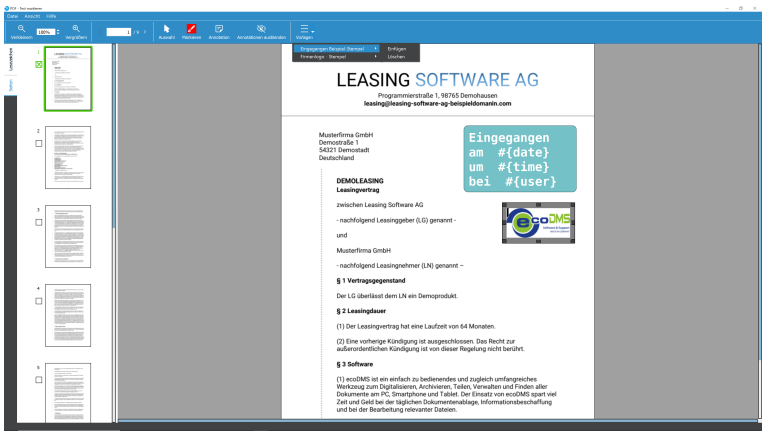


Figure 18.7: PDF Editor: Saved Annotations with Populated Placeholders (here: Preview Pane)

18.4.4.1 Save Annotation As Template

1. Create and fill an annotation with content
2. Right-click the annotation.
3. Click "Save Annotation As Template".
4. Assign a name to the template and confirm the entry with "OK".
5. The annotation is now available in the "Templates" chooser.



Figure 18.8: PDF Editor: Right-click - Save Annotation as Template

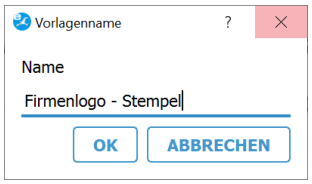


Figure 18.9: PDF Editor: Assign Template Name (Annotation)

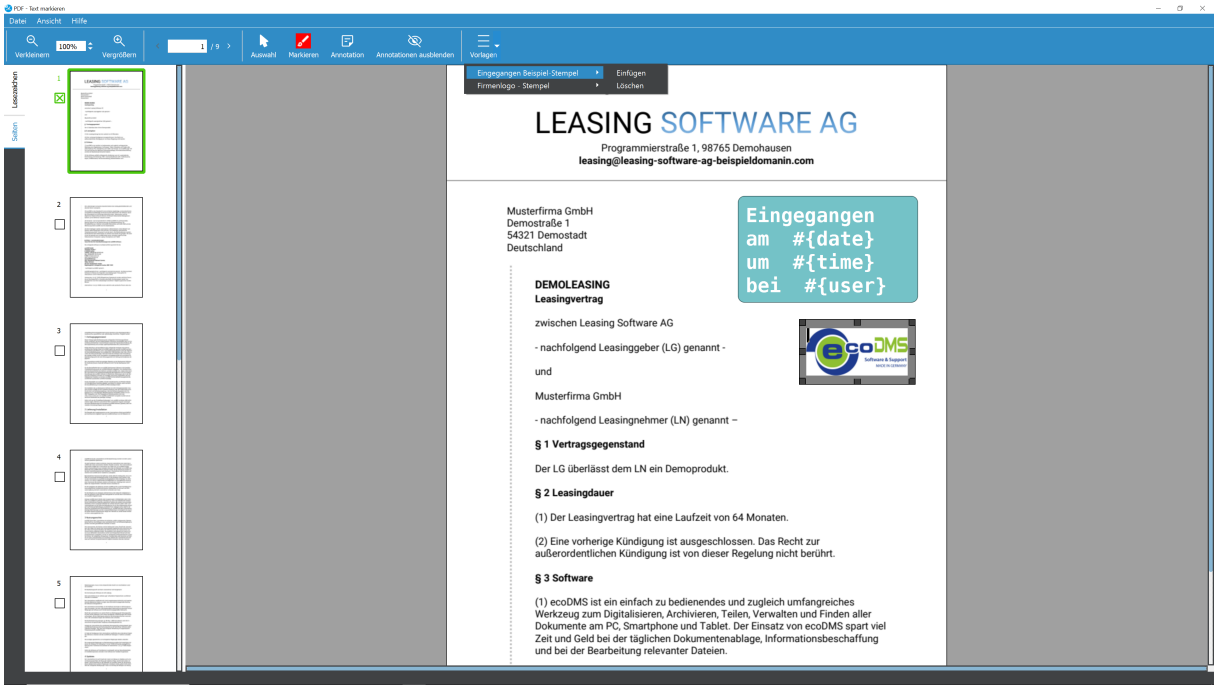


Figure 18.10: PDF Editor: Insert Templates (Annotation)

18.4.4.2 Delete Template

When you execute the delete function, the selected template is immediately deleted for all users. You cannot undo this operation.

To delete an annotation template in the PDF Editor, complete the following steps:

1. Open the PDF Editor for a document.
2. Click the "Templates" button
3. Select a template
4. Click "Delete"

18.4.5 Delete Annotation

To remove an annotation, complete the following steps:

1. Right-click the annotation.
2. Click "Delete Annotation".
3. The field is removed.



Figure 18.11: PDF Editor: Right-click - Delete Annotation

18.4.6 Show/Hide Annotations

The ribbon of the PDF Editor has a "Hide Annotations" or "Show Annotations" button (depending on the current setting).

1. Click "Hide Annotations" to hide all annotations and highlight colors.
   a) If you hide annotations, you cannot create new annotations.
2. Click "Show Annotations" to show all annotations and highlight colors.

18.5 15.5 Highlight Colors + Highlight Report

To highlight important information in a document and leave comments, you can use color highlights to highlight document passages. You can filter and download (export) documents based on these highlight colors. You can also create a highlight report in PDF format. The report contains a summary of all highlight colors and information such as the date of the highlight report generation, the color of the highlight, the DocID, the classification attribute, the highlighted area, the user, and the comment (note).

18.5.1 Highlight Areas

- All users with permission to access the document and the PDF - Editor can also remove and edit highlight colors.
- You cannot edit encrypted documents in the PDF - Editor.

In ecoDMS können Dokumente mit farbigen Markierungen versehen werden, um wichtige Informationen zu kennzeichnen und Kommentare zu hinterlassen.

18.5.1.1 Highlight Text

- You can also view the highlights you save in the PDF in a normal PDF reader.
- You can use them as often as you want with many different colors.

To highlight text passages in a document, complete the following steps:

1. Open the document in the PDF editor.
2. Click the "Highlight Text" button.
3. Choose a color.
4. Press and hold the left mouse button and move the mouse across the text you want to highlight.
5. Once you have made all highlights, you can save the changes. ecoDMS creates a new document version.
    a) To save the file, click "File - Save and Close.

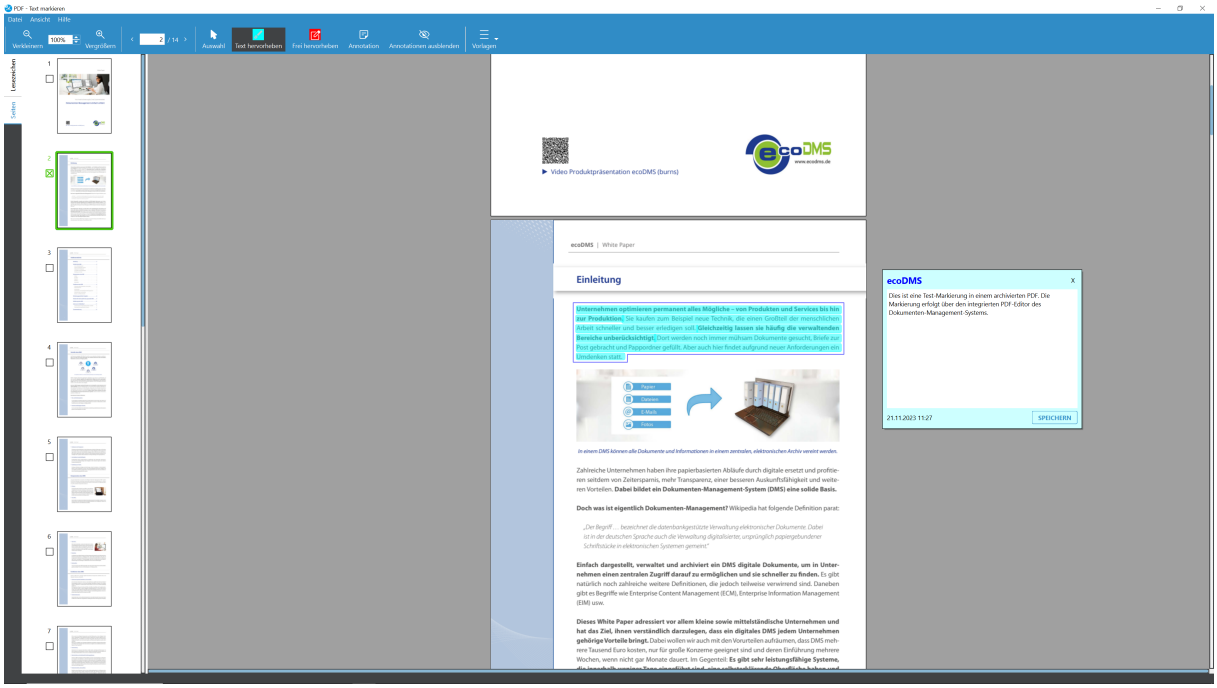


Figure 18.12: Highlight Colors: Highlight Text Passages in a Document (Example)

18.5.1.2 Free Highlight

- You can also view the highlights you save in the PDF in a normal PDF reader.
- You can use them as often as you want with many different colors.

To highlight any areas in a document in color, complete the following steps:

1. Open the document in the PDF editor.
2. Click the "Free Highlight" button.
3. Choose a color.
4. Press and hold the left mouse button and move the mouse across the area in the document you want to highlight.
5. Once you have made all highlights, you can save the changes. ecoDMS creates a new document version.
    a) To save the file, click "File - Save and Close".

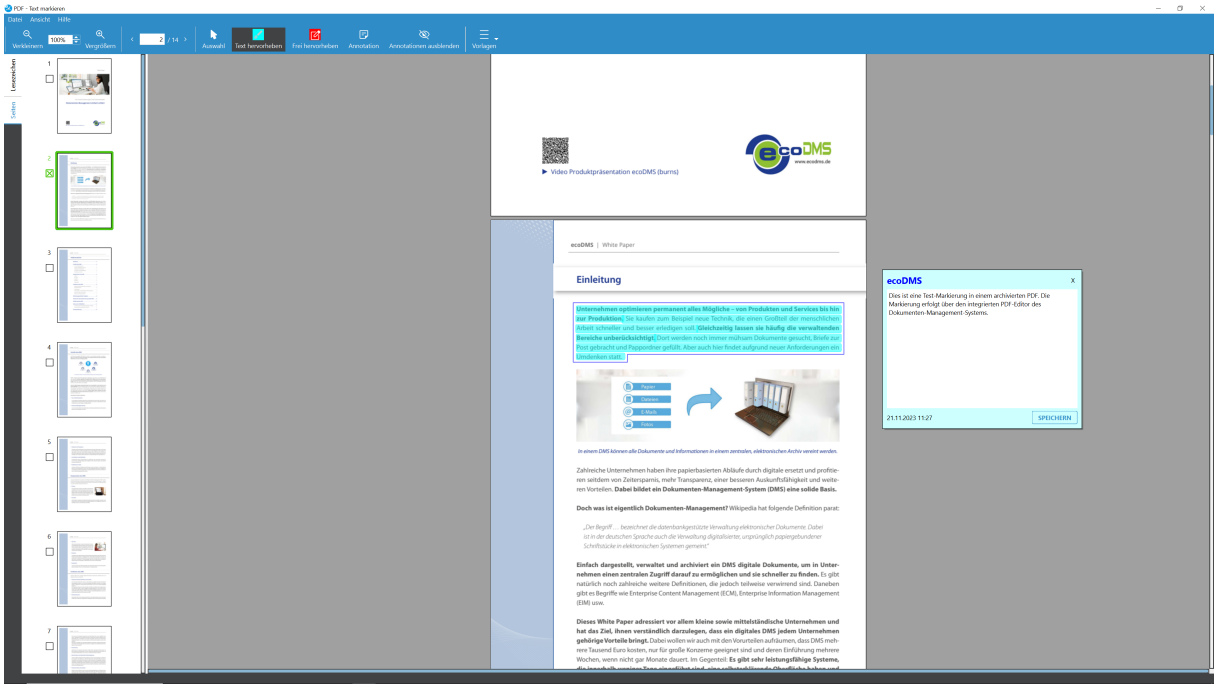


Figure 18.13: Figure 15.13: Highlight Colors: Highlight Any Areas in a Document (Example)

18.5.1.3 Add Notes / Comments

ecoDMS saves the notes you create together with the highlights in the PDF and you can view them in a normal PDF reader.

1. Highlight the text area which you want to comment on.
2. Double-click the Highlight.
3. Enter the note in the Note window.
4. Click Save.
5. Once you have created all highlights and notes, save your edits. ecoDMS creates a new document version.
    a) To save the file, click "File - Save and Close".

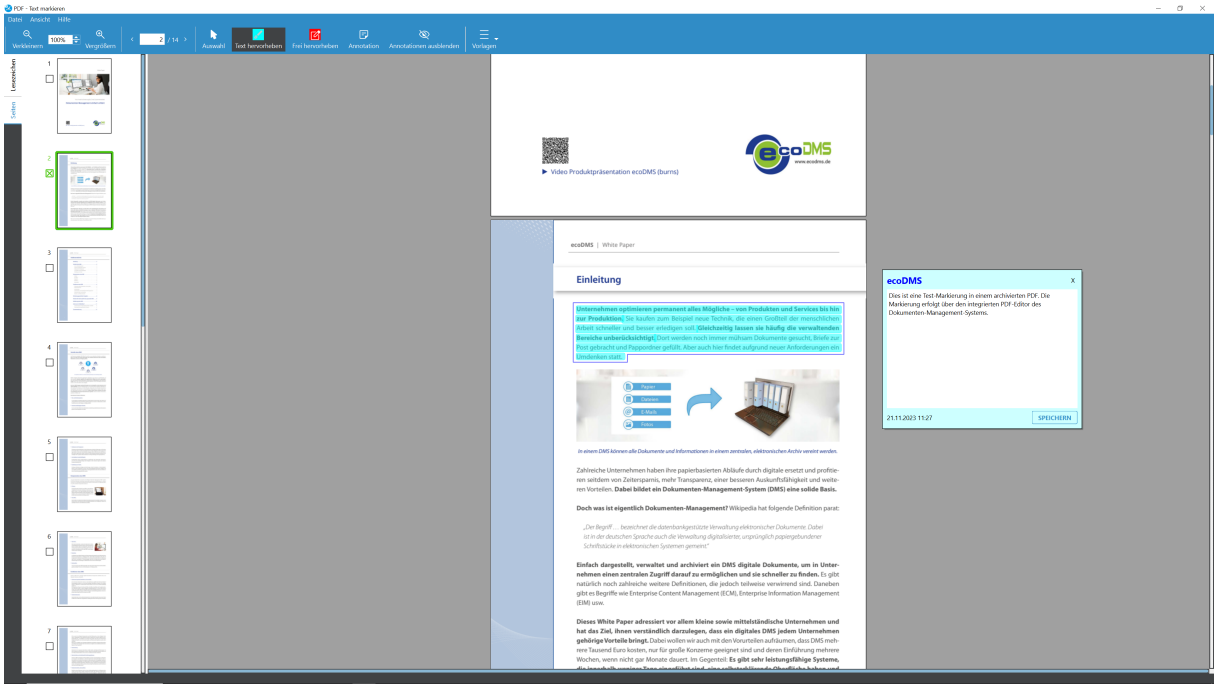


Figure 18.14: Figure 15.14: Highlight Colors: Create Notes / Comments for a Highlight Color

18.5.2 Generate Highlight Report

A highlight report in ecoDMS is a summary of all highlight colors added to a document. The report contains a summary of all information, such as the date of the highlight report generation, the color of the highlight, the DocID, the classification attribute, the highlighted area, the user, and the comment (note).

To

Pre-requisites:

- PDF Highlight Tracking must be enabled in the Settings.
- The user must have the permissions for the documents that are added to the highlight report.

create a highlight report, complete the following steps:

1. Select a folder whose documents you want to include in the highlight report.
   a) You can also select "All Folders" if you want to include all folders for which you have permissions.
2. In the ecoDMS ribbon, click "Generate Report".
3. Choose the highlight colors you want to list in the report.
4. Enable the "Archive report in ecoDMS" feature if you want to archive the highlight report straight to ecoDMS.
5. Click "OK".

Result: The highlight report is created as a PDF file and contains the following information:

1. Name of the selected folder
2. Date of highlight report
3. Highlight color
4. DocID
5. Comment (classification attribute)
6. Highlighted area
7. Author
8. Note

For multiple classifications, the classification attributes are separated with a comma.

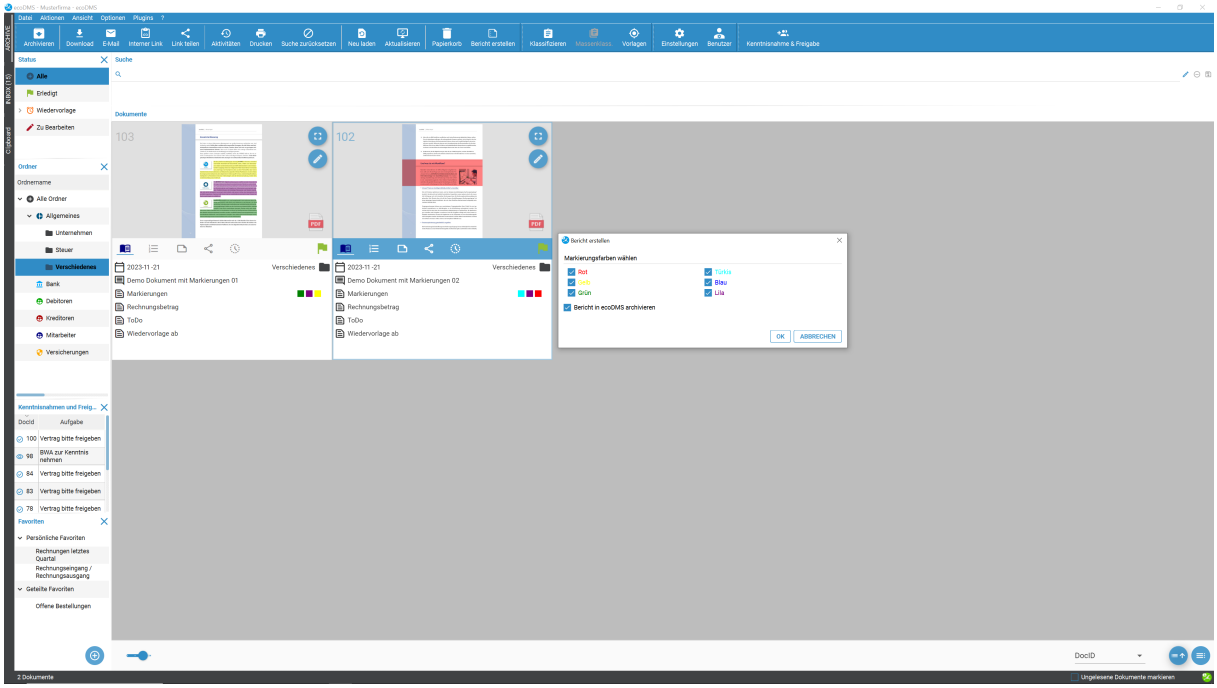


Figure 18.15: Create Highlight Report

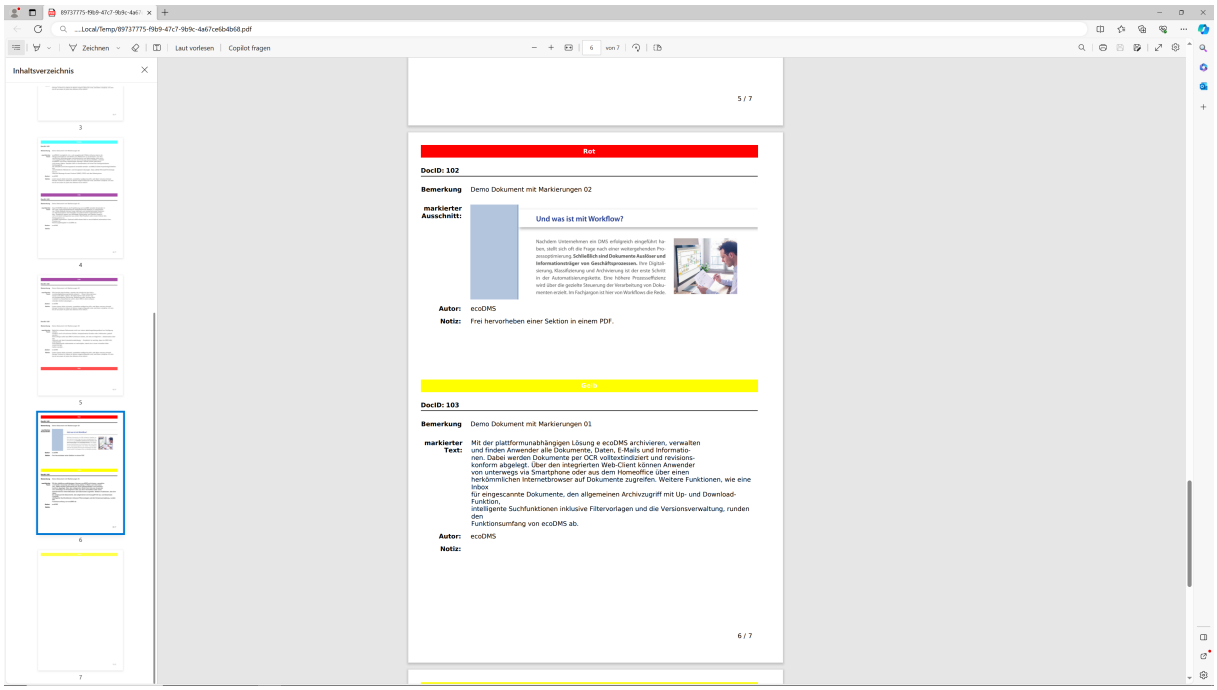


Figure 18.16: Example of a Highlight Report

18.5.3 Include Highlight Colors in Download

You can include highlight colors created in ecoDMS with the PDF editor when downloading documents.

Pre-requisites:
PDF Highlight Tracking must be enabled in the Settings.

This is how to do it:

1. Select the documents you want to download.
2. Click "Download".
3. Select the destination folder.
4. Select the highlight colors.
5. Click "OK"..

Result:
ecoDMS exports all selected documents. If the documents have highlight colors, only the selected highlight colors will be displayed in the downloaded PDFs.

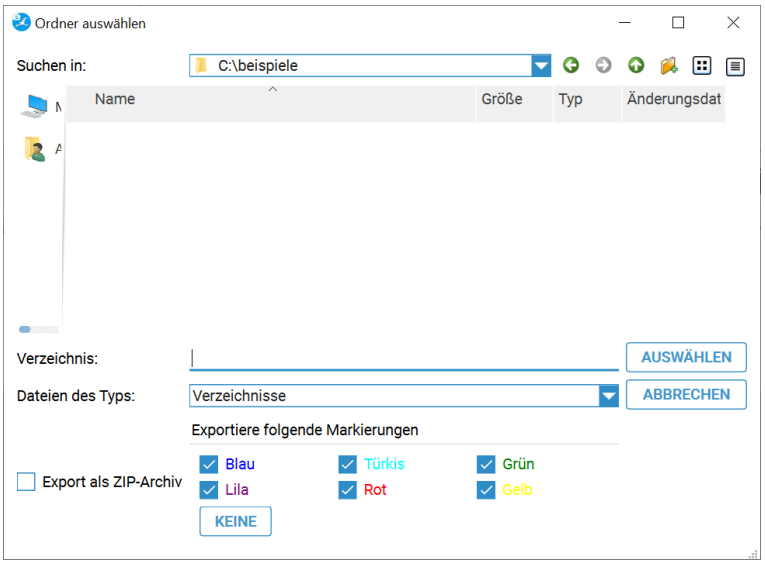


Figure 18.17: Downloading Documents from ecoDMS (here: incl. Highlight Colors)

18.5.4 Include Highlight Colors in Filters

When filtering documents, you can include highlight colors created with the PDF editor. You can find documents that contain specified highlight colors.

Pre-requisites:
PDF Highlight Tracking must be enabled in the Settings.

This is how to do it:

1. Click the Edit icon to the right of the search box to open the Advanced Search dialogue.
2. In the "Field" column, select the "Highlight Colors" attribute.
3. Set the matching operator for the search query.
4. Enter the highlight color as a value.
5. Click "OK" to start the search or "Cancel" to abort the process.

Result:
ecoDMS only displays documents with the filter criteria. For example, you can find all documents with the highlight color red.

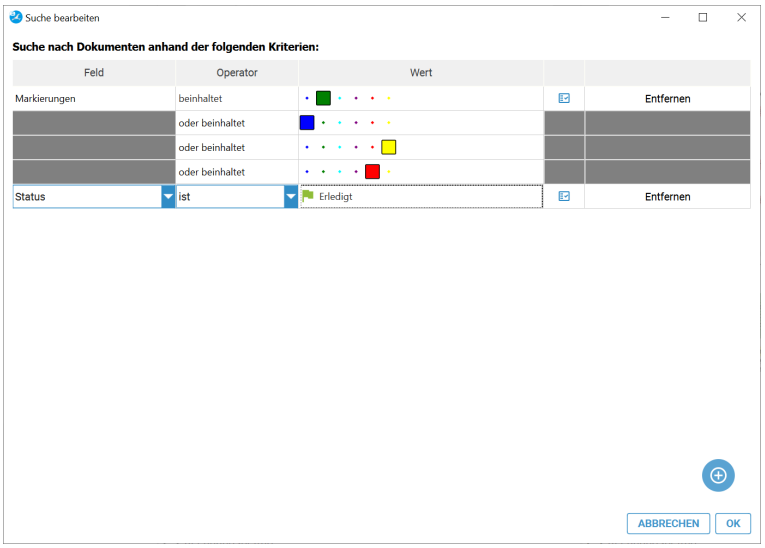


Figure 18.18: Example: This example searches for documents with the "Done" status that contain the colors "green, blue, yellow or red" as highlight colors.

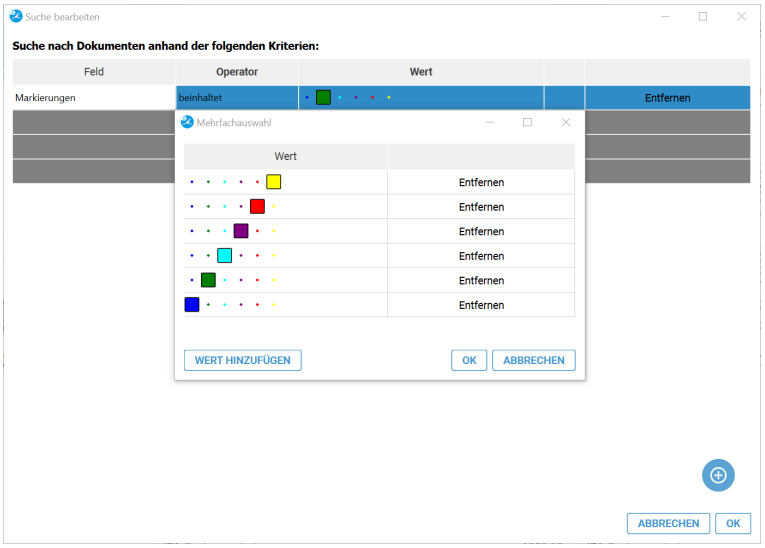


Figure 18.19: Highlight Color Tracking: Advanced Search with OR Operation for All Colors

19 Blackening PDF

- This feature requires a license for the full version of ecoDMS, but you can test it in the trial version. This feature is not enabled in the Free4Three version.
- The "Blackening PDF" feature is only available in the preview pane (not in the Card preview) for the visible documents (PDFs).
- The blackened information is saved in the "Blackened Versions" tab, which you can only see in the preview pane.
- Every time you save a document with the "Blackening PDF" feature, ecoDMS creates a new entry on the "Blackened Versions" tab.
- You cannot edit encrypted documents in the PDF Editor.

Occasionally, parts of documents need to be blackened for special purposes. Blackening passages is important if, for example, you pass on documents to third parties. For internal use of the documents, the blackened passages are removed. In the internal view the document is fully visible. In such cases you can use the "Blackening PDF" feature of ecoDMS.

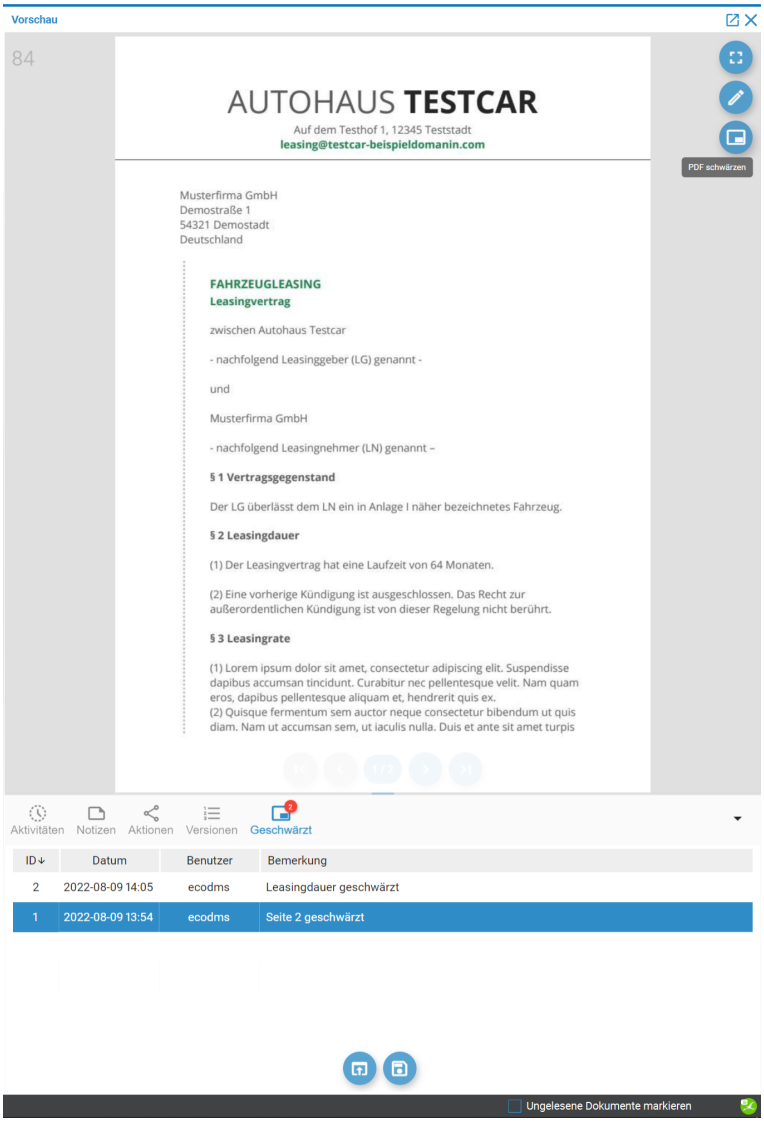


Figure 19.1: Preview Pane: Blackening PDF (Icon) + "Blackened Versions" Tab

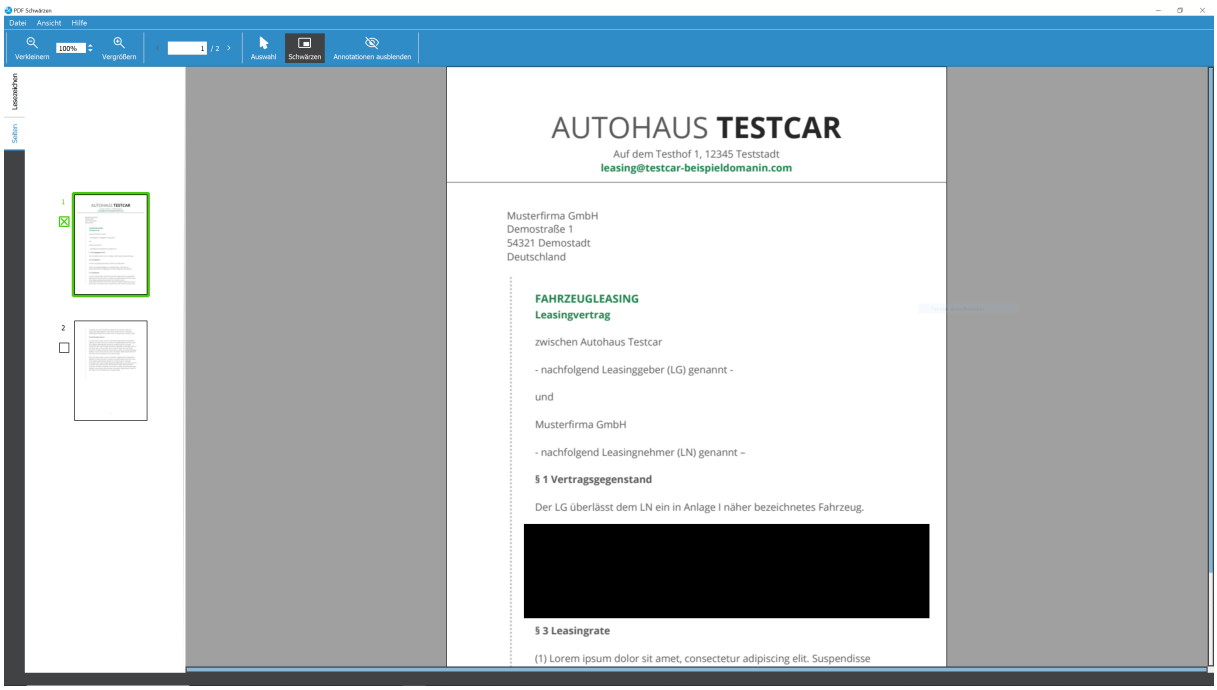


Figure 19.2: PDF Editor "Blackening PDF"

19.1 Blacken

- For each redacted version you can enter a note on the "Blackened Versions" tab.
- A badge displays the number of blackened versions.
- You cannot edit a blackened version and a blackened version does not display in the preview.

To blacken a PDF, complete the following steps:

1. In the preview pane, click "PDF Blackening".
2. In this PDF Editor, click "Blacken".
3. Select the area in the document which you want to blacken.
4. You can blacken any number of passages in a document.
5. Click "File - Save and Close" to save the document.
6. The redacted version of this document displays on the "Blackened Versions" tab below the document preview in the preview pane.

19.2 Unblacken

You can only undo a redaction as long as the current version is open. To do so, complete the following steps:

1. Right-click the blacked out area in the PDF Editor and select "Unredact"

19.3 Open Blackened Version

You can save different versions of a redacted document. They display on the "Blackened Versions" tab below the document preview in the preview pane. To open a version, complete the following steps:

1. Go to the "Blackened Versions" tab below the document preview in the preview pane.
2. Select a version by
    a) double-clicking the entry
    b) or opening the entry by clicking "Open Version"

19.4 Export Blackened Version

You can save different versions of a redacted document. They display on the "Blackened Versions" tab below the document preview in the preview pane. To export a version, complete the following steps:

1. Go to the "Blackened Versions" tab below the document preview in the preview pane.
2. Select a version by
3. Click "Export Version"

20 Clipboard: Collect Documents

- This feature requires a license for the full version of ecoDMS but can also be tested in the trial version. This feature is not enabled in the Free4Three version.
- Storing files in the clipboard has no effect on existing access permissions or classifications of individual documents.
- You can add up to 200 documents to each clipboard.
- When you open the clipboard, the documents load one after the other. This process may take a while depending on the number and size of the file(s).

Use the Clipboard tab in ecoDMS to collect archived documents in a kind of virtual folder. Each user can create several clipboards and fill them with documents. You can also share a clipboard with other users / groups. Moreover, you can export the collected documents and send them by email.

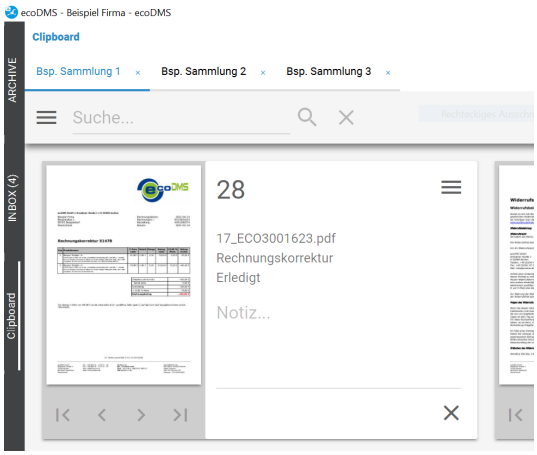


Figure 20.1: Tabs in ecoDMS Client - Clipboard

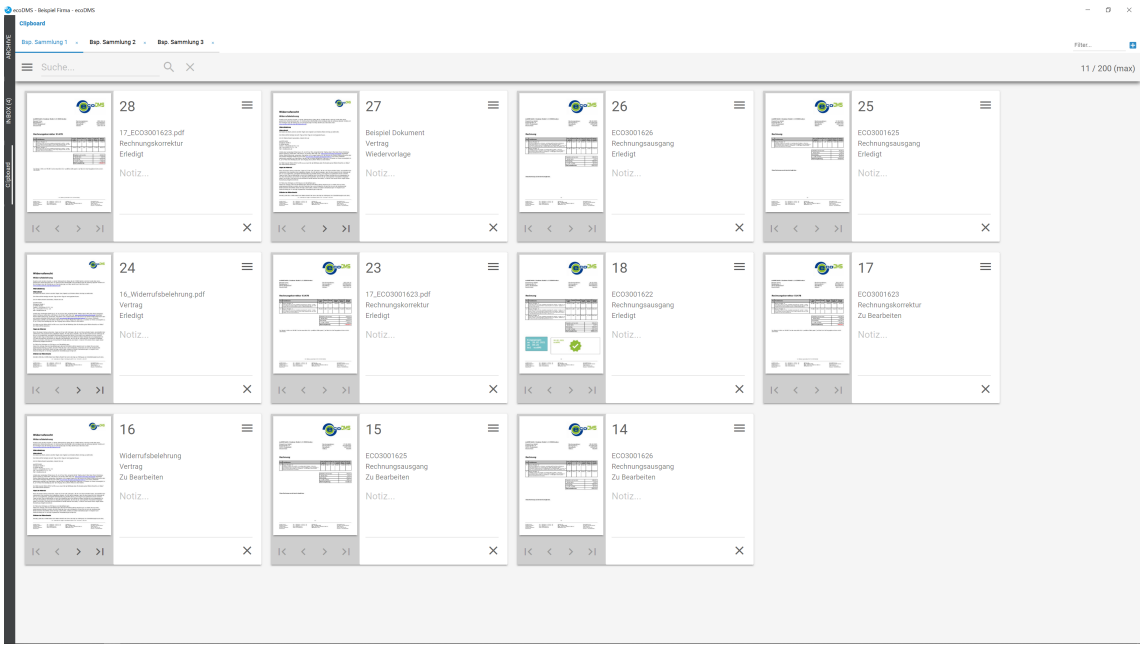


Figure 20.2: Clipboard - Example Document Collection

20.1 Add Documents

You can add up to 200 documents to each clipboard. To drag one or more documents to a clipboard, complete the following steps:

1. Select the documents
    a) Press and hold the CTRL key to select several documents at once
2. Drag&drop the documents onto the Clipboard tab
    a) If there are several clipboards, they display when you move the documents onto the Clipboard tab. Simply drag the documents straight onto the desired clipboard

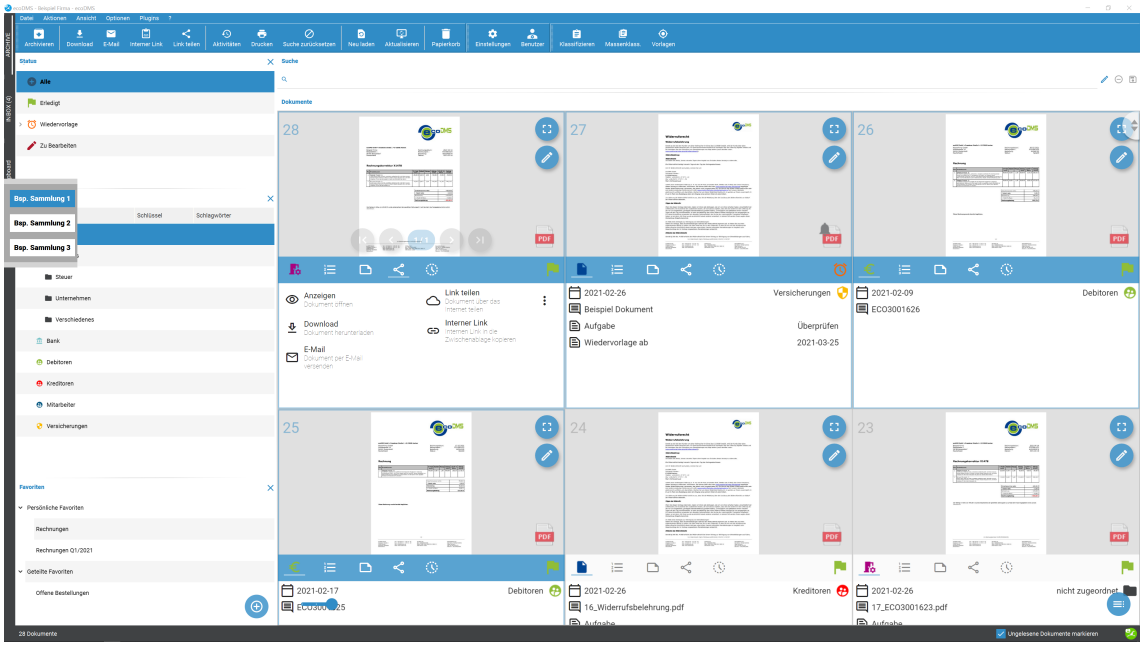


Figure 20.3: Clipboard - Drag and Drop Documents onto a Clipboard

20.2 Create Clipboard

ecoDMS has a default clipboard. You can add more clipboards.

1. Click the Menu icon on the Clipboard tab -> New Clipboard
    a) Alternatively, you can create a new clipboard by using the "Plus" icon at the top right of the Clipboard window
2. ecoDMS creates another tab with the name "New Clipboard"
3. Double-click the name of the clipboard to rename it

20.3 Empty Clipboard

To remove all documents from a clipboard, complete the following steps

1. Open the clipboard
2. Click the Menu icon on the Clipboard tab -> Empty Clipboard
3. All documents are immediately removed from the selected clipboard
    a) You cannot undo this operation
    b) The files are only removed from the clipboard, not from the archive.

20.4 Remove Clipboard

To delete a clipboard, complete the following steps:

1. Open the clipboard
2. Click the Menu icon on the Clipboard tab -> Remove Clipboard
    a) Alternatively, you can click the X icon next to the clipboard name
3. Confirm the confirmation prompt "Delete Clipboard - Delete Clipboard XXX" with "Yes", or abort the process with "No"
4. The clipboard is irrevocably deleted
    a) You cannot undo this operation

20.5 Export Documents

To export the documents on a Clipboard, complete the following steps:

1. Open the clipboard
2. Click the Menu icon on the Clipboard tab -> Export Clipboard
3. In the dialog of your file system, select the destination folder for the export
    a) If you want to export all documents as a ZIP file, enable the "Export as ZIP Archive" function

20.6 Send Documents

To send the documents on a Clipboard via email, complete the following steps:

1. Open the clipboard
2. Click the Menu icon on the Clipboard tab -> Send Clipboard
3. If you are using Windows as your operating system, you can now rename the file
    a) To rename a file, simply double-click the name, enter the new name and confirm with "Enter"
    b) Confirm your entries with "OK" to continue, or abort the process with "Cancel"
4. ecoDMS opens the default email programme of your computer and attaches the file in the message window

- Depending on the application, you cannot send attachments directly from ecoDMS. This is not an error in ecoDMS. For more information on this topic for Ubuntu, please refer to https://bugs.launchpad.net/ubuntu/+source/xdg-utils/+bug/1019259. As a workaround, the administrator can deposit a script for opening the mail client in the settings dialog, where it is available for all users (c.f. "Settings" chapter).
- You can only rename the email attachment before sending if you have a Windows client.

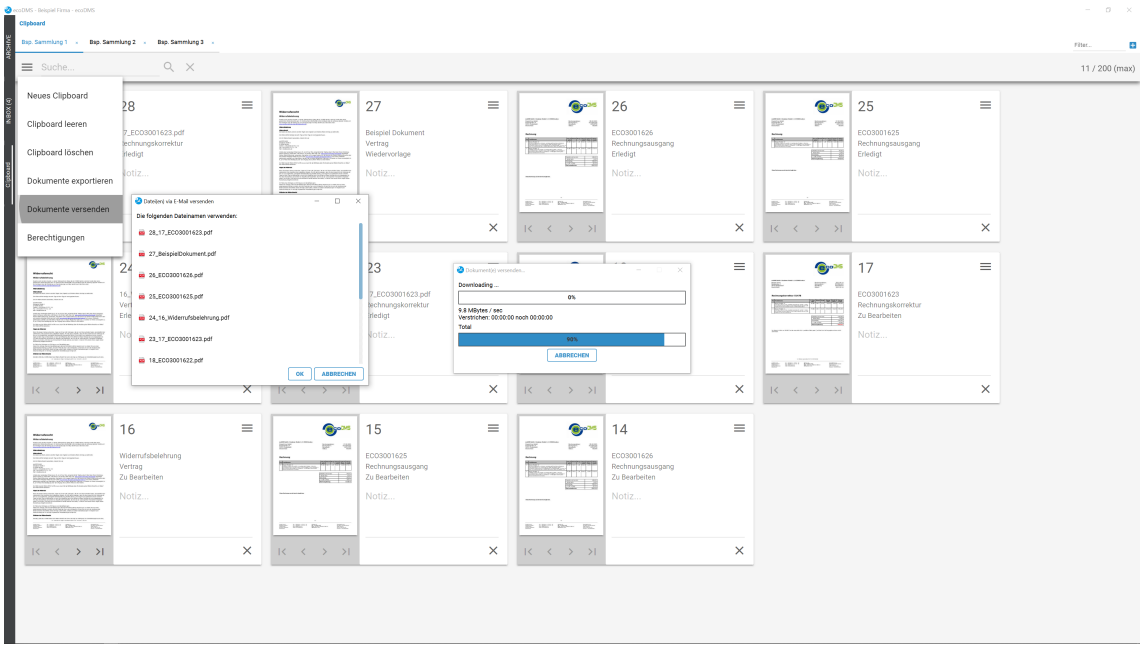


Figure 20.4: Clipboard - Send Documents by Email and Rename Files Beforehand

20.7 Clipboard Permissions

- Existing document and folder permissions are independent of clipboard permissions.
- Users can only see the documents for which they have permissions (classification, folder permission).

A clipboard, on the other hand, can be shared with other users. The user who creates a clipboard can assign read and write permissions.

1. Open the clipboard
2. Click the Menu icon on the Clipboard tab -> Permissions
3. In the Permissions dialog, assign the respective read and write permissions for the clipboard

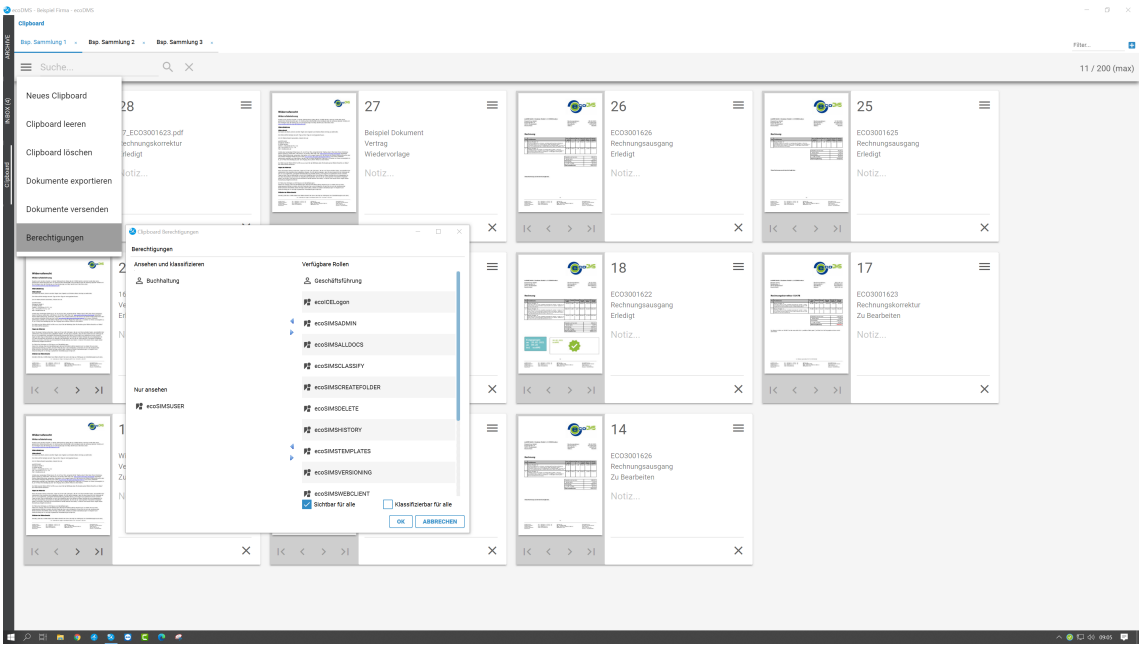


Figure 20.5: Clipboard - Share Clipboard with Other Users (Permissions)

20.8 Open Document

- To enlarge the preview of a document in the clipboard, simply click the preview image.
- To open the file, ecoDMS uses the default application on your computer for the specified file type.

The clipboard displays a separate card view for each document. Each entry contains the DocID, the comment, the document type, the status and an optional note. PDFs also have a preview in which you can scroll through the individual pages. Whether or not a preview is available, you can always open the file from the clipboard. To do so, complete the following steps:

1. Open the menu in the upper right corner of the document on the clipboard -> Open Document
2. ecoDMS opens the document

20.9 Delete Document

To remove a document from the clipboard, complete the following steps:

1. Open the menu in the upper right corner of the document on the clipboard -> Delete Card
    a) Alternatively, you can click the X icon in the lower right corner of the document card
2. The document is immediately removed from the selected clipboard
    a) You cannot undo this operation

b) The file, in this case, is only removed from the clipboard, not from the archive

20.10 Show Classification

1. If you have the permission, you can use the classification dialog as usual.
2. Please note that changes to the classification will also have an effect outside the clipboard.
3. This dialog is where you specify the classifications for all DocIDs in ecoDMS.

To open the classification dialog for a document from the clipboard, complete the following steps:

1. Open the menu in the upper right corner of the document on the clipboard -> Show Classification
2. ecoDMS opens the classification dialog for the document

20.11 Search for Clipboard

If there are several clipboards, you can filter them by name.

1. Enter the name of the tab you want to search for in the "Filter" search box
   a) The search box is in the top right corner of the clipboard window
2. Confirm your entry with "Enter"
3. ecoDMS displays the retrieved clipboard tabs
   a) To stop filtering, simply delete the entry

20.12 Search Documents in Clipboard

Use a full-text search to search for documents within a clipboard.

1. Enter the search term in the search box of the clipboard
2. Confirm your entry with "Enter"
3. The matching results are displayed in the clipboard
4. The "X icon" ends the search process in the clipboard

21 Notes

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

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

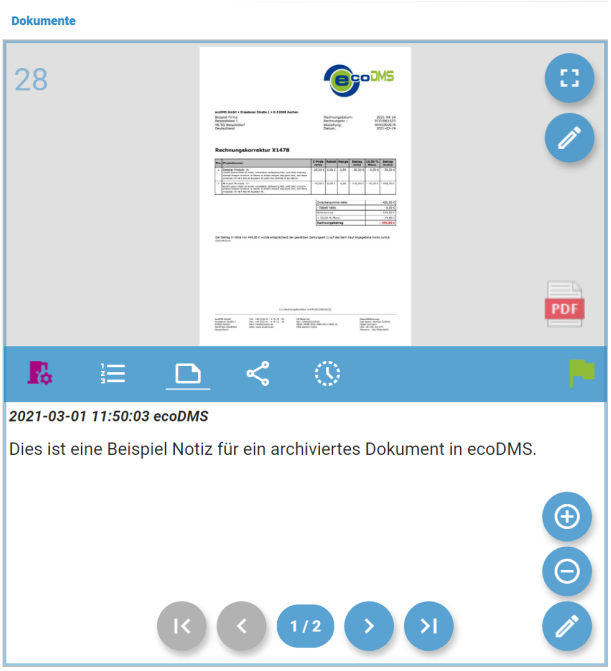


Figure 21.1: Notes - Card View (Example)

21.1 Write New Note

To write a note, complete the following steps:

1. Select a document
2. Open the "Notes" tab of the document
3. Click the "New Note" icon
4. Enter a text

5. Click "Save" to save your entry

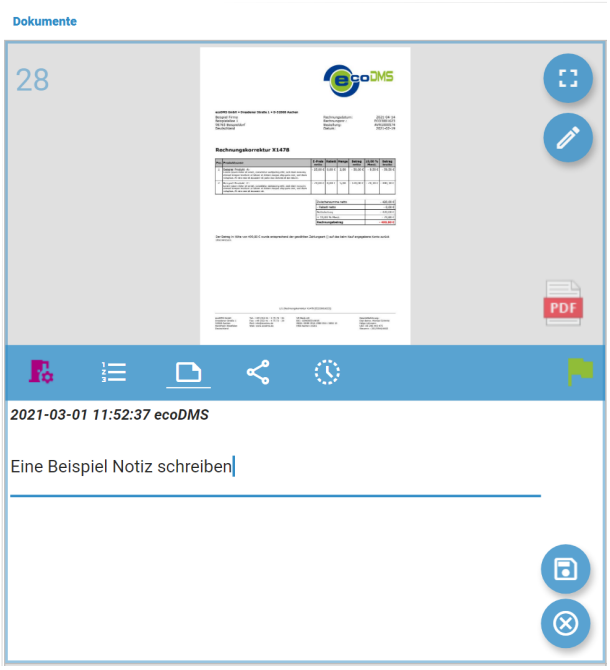


Figure 21.2: Notes - Enter Text (Card View)

21.2 Edit Note

To edit a note, complete the following steps:

1. Select a document
2. Open the "Notes" tab of the document
3. If there are several notes, select a note using the arrow keys
4. Click the "Edit Note" icon
5. Make your changes
6. Click "Save" to save your entry

21.3 Delete Note

To delete a note, complete the following steps:

1. Select a document
2. Open the "Notes" tab of the document
3. If there are several notes, select a note using the arrow keys

4. Click the "Delete Note" icon
5. The note is immediately and irrevocably deleted
    a) You cannot undo this operation

22 Linking / Attachments

- This feature requires a license of the ecoDMS Full Version but can be tested within the Free Trial. In the Free4Three version, this feature is not activated.
- This feature is only available in the table view.

With this feature, you link multiple documents in ecoDMS, with one serving as the main document. Linked documents appear collapsed under the main document and can be expanded if needed. Email attachments can also be expanded in the "Attachments" area of the main email.

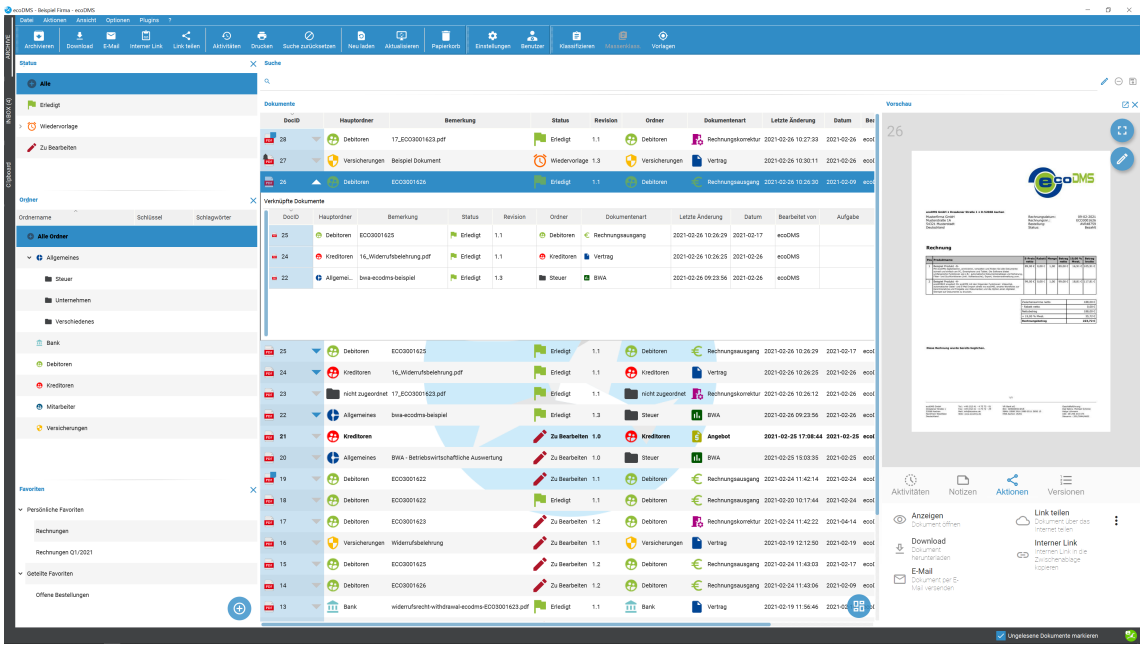


Figure 22.1: Linked Documents - Example in the Table View

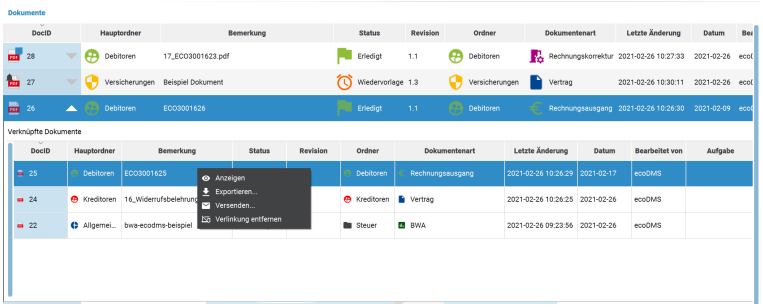


Figure 22.2: Linked Documents - Features

22.1 Linking

With this feature, you can link multiple documents in ecoDMS – similar to a virtual paperclip. One document is set as the main document. You can attach any number of additional documents to this main document. In the table view of ecoDMS, the linked documents are displayed collapsed under the main document and can be expanded if needed.

22.1.1 Create Link

To link documents, complete the following steps:

1. Select the "main document" and click the arrow next to the DocID
2. Select the documents you want to link to the main document
    a) Press and hold the CTRL key to select several documents
3. Drag and drop the selected documents into the extended "Linked Documents" area of the main document

22.1.2 Remove Link

To undo the link of a document, complete the following steps:

1. Select the "main document"
2. Expand the linked documents by clicking the arrow next to the DocID
3. Right-click the link you want to delete -> Remove Link

22.1.3 Open Link

- To open the file, ecoDMS uses the default application on your computer for the specified file type.

To open the file of a linked document, complete the following steps:

1. Select the "main document"
2. Expand the linked documents by clicking the arrow next to the DocID
3. Select the links
    a) Press and hold the CTRL key to select several documents at once
4. Right-click -> Display
    a) Alternatively, you can open a document by double-clicking the DocID

22.1.4 Export Link

To export linked documents, complete the following steps:

1. Select the "main document"
2. Expand the linked documents by clicking the arrow next to the DocID
3. Select the links
    a) Press and hold the CTRL key to select several documents at once
4. Right-click -> Export
5. In the dialog of your file system, select the destination folder for the export
    a) If you want to export all documents as a ZIP file, enable the "Export as ZIP Archive" function

22.1.5 Send Link

To send linked documents as email attachments, complete the following steps:

1. Select the "main document"

- Depending on the application, you cannot send attachments directly from ecoDMS. This is not an error in ecoDMS. For more information on this topic for Ubuntu, please refer to https://bugs.launchpad.net/ubuntu/+source/xdg-utils/+bug/1019259. As a workaround, the administrator can deposit a script for opening the mail client in the settings dialog, where it is available for all users (c.f. "Settings" chapter).
- You can only rename the email attachment before sending if you have a Windows client.

2. Expand the linked documents by clicking the arrow next to the DocID
3. Select the links
    a) Press and hold the CTRL key to select several documents at once
4. Right-click -> Send

5. In the dialog of your file system, select the destination folder for the export
    a) If you want to export all documents as a ZIP file, enable the "Export as ZIP Archive" function
6. If you are using Windows as your operating system, you can now rename the file
    a) To rename a file, simply double-click the name, enter the new name and confirm with "Enter"
    b) Confirm your entries with "OK" to continue, or abort the process with "Cancel"
7. ecoDMS opens the default email programme of your computer and attaches the file in the message window

22.2 Email Attachments

When archiving emails (e.g., via the Thunderbird Plugin or the MS Office/Outlook Plugin of ecoDMS), the attachments are directly stored with the message as expandable elements in the table view.

1. The email is saved as the main document.
2. The attachments are stored in the "Attachments" area of the main email.
3. These attachments are initially collapsed but can be expanded if needed.
4. This way, related documents remain clear and well organized – similar to a paperclip holding several pages together.



Figure 22.3: WORKZ Add-on -> Email Import -> "Link Attachments with Email Document" -> here: Result in the table view

23 Sharing Documents over the Internet

- To use this feature, you first need to enable remote access in the ecoDMS settings dialog.
- In addition, you require the system permissions for sharing documents via the internet.
- This feature requires a license for the full version of ecoDMS but can also be tested in the trial version. This feature is not enabled in the Free4Three version.
- ecoDMS recommends you assign secure access settings (password, etc.) because you are providing archived data to externals.

Users with the relevant permissions can share documents with third parties via the internet and make them available for external download. To download these documents, the recipient requires a unique download link and the matching password. All necessary sharing settings are made in advance by the responsible user in the ecoDMS. The sharing period can also be configured by setting a date.

23.1 Enable Remote Access

To share documents from ecoDMS via the internet, you must enable remote access in the Settings.

To learn more about the web settings and the associated remote access of the ecoDMS web client, refer to the chapter "Web Access > Remote Access" in the Web Client manual.

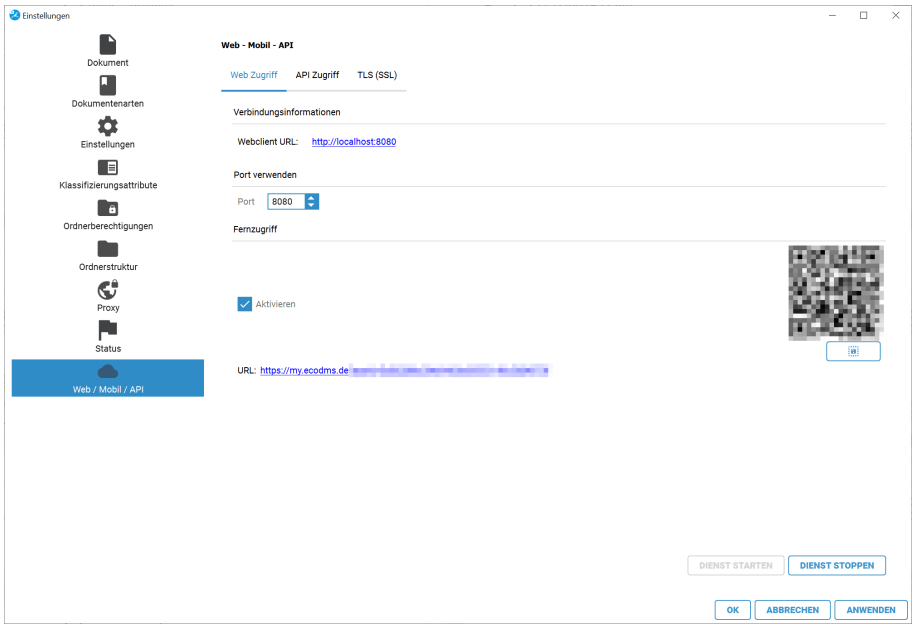


Figure 23.1: Enable Remote Access in ecoDMS Settings

23.2 Share Documents

To provide selected documents for download, complete the following steps:

1. Select the documents
   a) Press and hold the CTRL key to select several documents at once
2. Start the "Share Documents" dialog using one of the following options:
   a) Toolbar -> "Share Link" icon
   b) Menu -> Actions -> Share Document via Internet
   c) Table view: Right-click -> Actions -> Share Document via Internet
   d) Keyboard shortcut: CTRL + T
3. **Password:** Assign a secure password.

   - The password is required to start the download.
   - ecoDMS recommends you assign a password.
   - The password must have at least 8 characters.
   - This is an optional field, not a mandatory field.

4. **Maximum Download Count:** Enter how often the documents you provide may be downloaded.

You can restrict the number of possible downloads here. For example, you can specify that the provided documents may be downloaded a maximum of two times. In this case, enter "2" as the value. When the maximum number of downloads has been reached, the files cannot be downloaded again.

5. **Share until:** Here you can enter a relevant description.

   a) ecoDMS recommends you define an end date for sharing the selected files.
   b) Once this date has expired, the documents can no longer be downloaded.

6. **Comment:** Here you can enter a relevant description.

   a) Entering a comment is optional.
   b) A comment may be a note about the purpose of the download (e.g. Quarterly figures for the accountant).

7. **OK**: Save and copy the download link to the clipboard

   a) As soon as you click the OK button, ecoDMS creates the associated download link and copies the link to the clipboard.
   b) You can no longer make changes after you click OK. If you want to make changes, you must delete the download (see "Delete External Downloads") and create a new download.

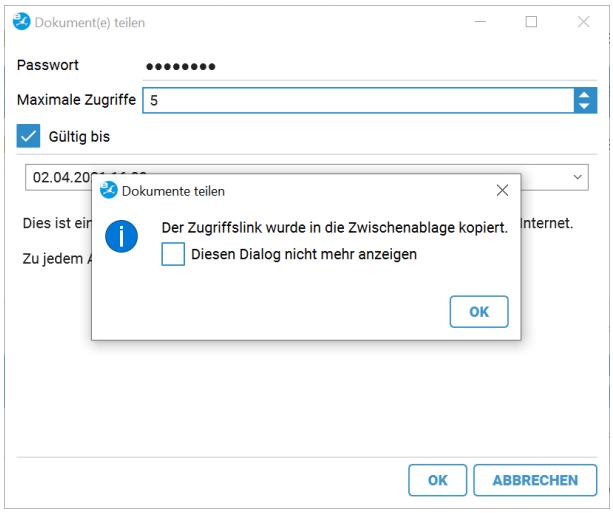


Figure 23.2: Share Document(s) - Settings with Clipboard Information

23.3 Start Download

To start downloading the shared documents, recipients need the generated download link. Moreover, the ecoDMS server must be accessible and remote access must be enabled.

1. Copy the download link to the web browser.
2. If a password was assigned, ecoDMS requests the recipient to enter this password.
    a) Enter the password in the input box.
3. The download starts automatically.

a) Click the "Download Cloud" to start downloading manually.
b) If there are several files for download, these are zipped to a ZIP file while retaining their original format.
c) A single file is not zipped for download.
d) The file formats in the ecoDMS table are used for download.

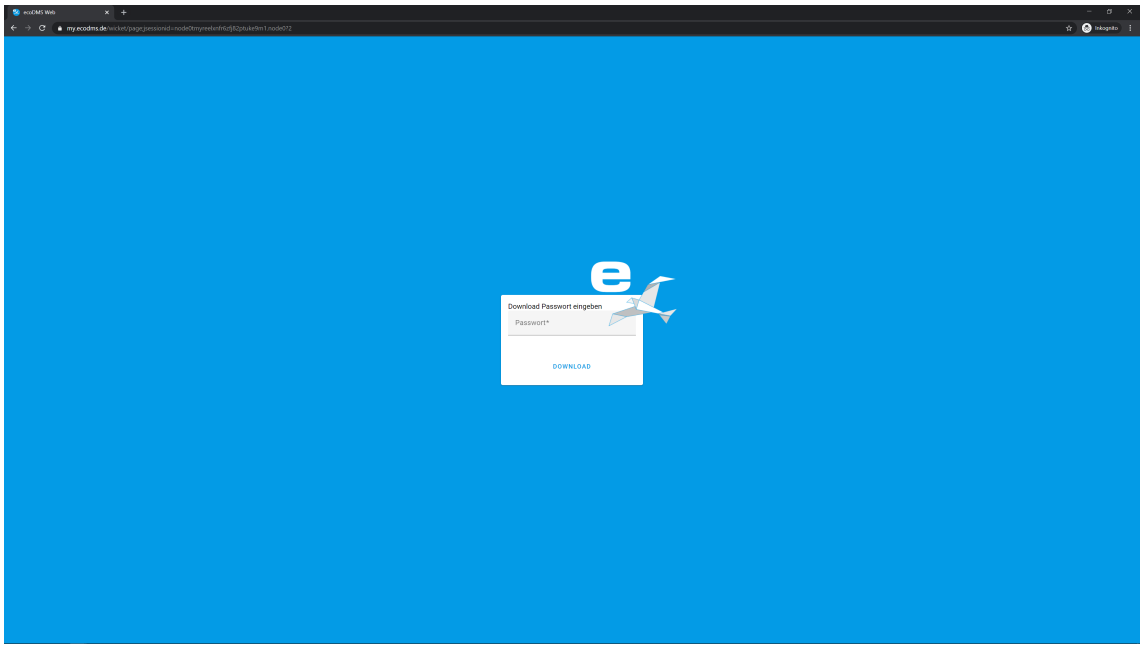


Figure 23.3: Share Document(s) - Download - Login

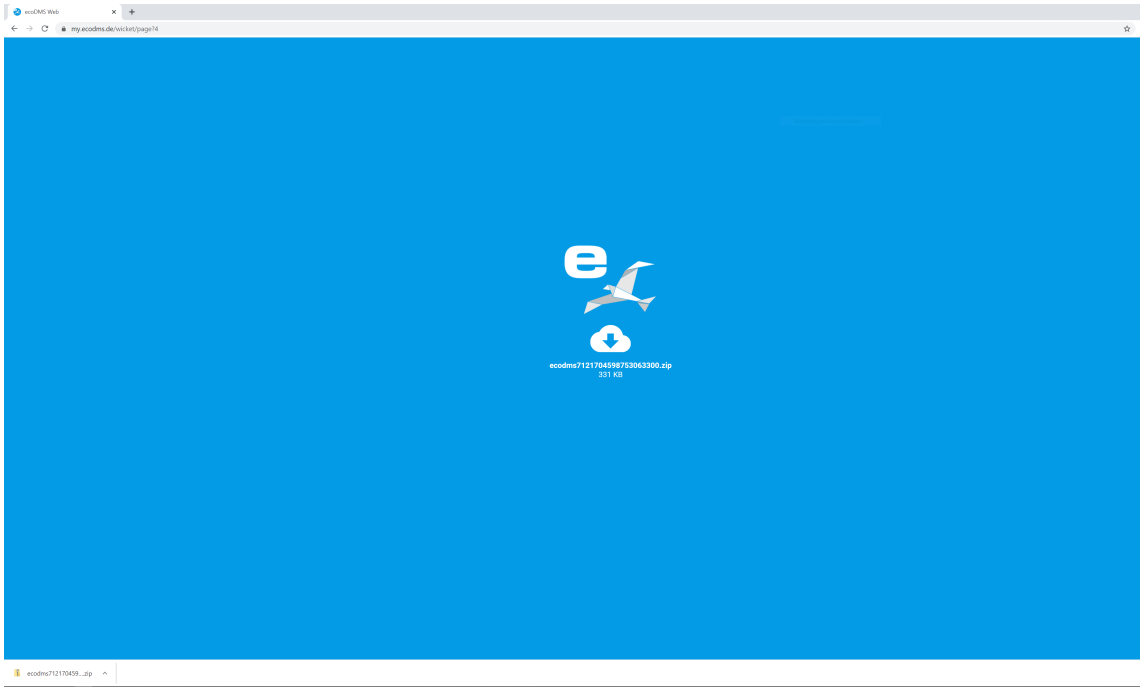


Figure 23.4: Share Document(s) - Download - ZIP File

23.4 Shared Documents Overview

ecoDMS has an overview of shared documents and their respective settings and downloads in form of a list. The list shows all information in a table. You cannot modify the list entries. If you need to modify any settings, you must delete the entry from the list (Actions column) and re-create the entry with the "Share Document(s)" function.

1. Open the list by clicking "Menu > Actions > Shared Documents..."

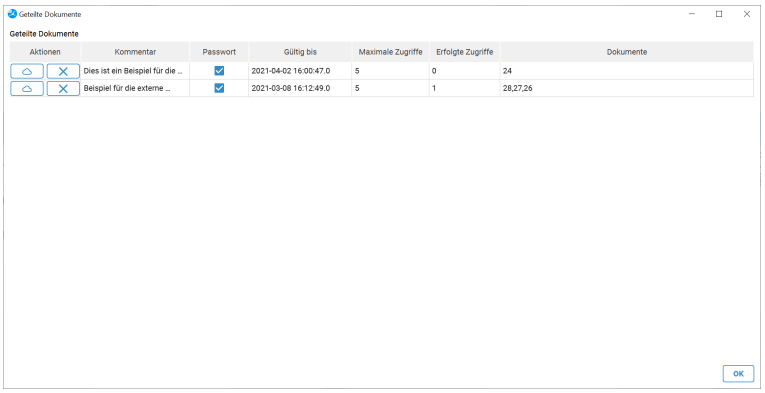


Figure 23.5: Share Document(s) - Overview of Shared Documents

23.5 Delete Downloads

You can stop external sharing of documents. To do so, you must delete the respective download job from the "Overview of Shared Documents". To do so, complete the following steps:

1. 1. Open the "Overview of Shared Documents" by selecting "Menu > Share > Shared Documents".
2. Click the "X" icon in the "Actions" column.
3. Confirm the delete prompt with "Yes".
4. The download link is now irrevocably removed.

23.6 Retrieve Download Link

You can retrieve the respective download link in the dialog for the Overview of Shared Documents. To do so, complete the following steps:

1. 1. Open the "Overview of Shared Documents" by selecting "Menu > Share > Shared Documents".
2. In the "Actions" column, click the cloud icon.
3. The download link is now automatically copied to the clipboard.

24 Direct Links to Documents and Folders

With ecoDMS, you can easily create internal links to archived documents or folders. This allows them to be opened directly from other programs (e.g. inventory management or customer management systems). A single click on the link opens either the document or the corresponding folder directly in the ecoDMS client.

- The link function must first be activated by
  and information in this manual: 7.4.1.5.
- The type of link depends on the settings c

```
dms-link://DESKTOP-5F074KC:17001/o
```

```
http://localhost:17003/openDoc?ope
```

```
http://DESKTOP-5F074KC:17004/rest/
```

24.1 Copying a Link to a Document

Would you like to create a link to a document and paste it elsewhere (e.g., in a browser or another software)? Here's how:

1. Select the document
2. Use one of the following methods to copy the link:
   - Card view: Tab Actions -> Internal Link
   - Menu: Actions -> Copy internal link to clipboard
   - Toolbar: Click the link icon
   - Table view: In the preview window -> Tab Actions -> Internal Link
   - Right-click (table view): Copy internal link to clipboard
   - Keyboard shortcut: Ctrl + Alt + L



Figure 24.1: Icon - Copy Internal Link to Clipboard

24.2 Send Document Link via Email

A new window of your default email program will automatically open with the inserted link.

Would you like to send the link directly via email? Here's how:

1. Select the document
2. Use one of the following options:

- Menu: Actions -> Send internal link via email
- Right-click (table view): Send internal link via email
- Keyboard shortcut: Ctrl + Alt + M



Figure 24.2: Icon - Send Internal Link via Email

24.3 Copying a Link to a Folder

- The link can be pasted into, for example, a web browser or another application.
- Clicking the link opens the ecoDMS client.
- The linked folder is automatically selected in the folder structure, and all documents it contains (provided the user has the necessary permissions) will be displayed.

With a folder link, you can specifically reference a particular folder in ecoDMS when you want to directly access documents from another program.
Here's how to create a folder link:

1. Select the folder in the ecoDMS folder structure
2. Right-click on the folder -> "Copy link to clipboard"

24.4 Send Folder Link via Email

- Your default email program will automatically open.
- The link will be inserted directly into the email.
- Clicking the link opens the ecoDMS client, where the linked folder is automatically selected, and the associated documents are immediately visible.

Would you like to share a folder link via email? Here's how:

1. Select the folder in the ecoDMS folder structure
2. Right-click on the folder -> "Send link via email"

25 Activities and History

ecoDMS documents all modifications to the classification and document assignment. It also records all user actions. This makes all processing and archiving steps traceable. ecoDMS logs every event with date, time and user name.

ecoDMS documents the following user actions with a timestamp and username:

- Document
  - archive
  - viewed
  - send via email
  - share via internet
  - download / export

ecoDMS also logs the following details for documents shared via internet:

- User name of the user who shared the documents
- Time of download (internet user)

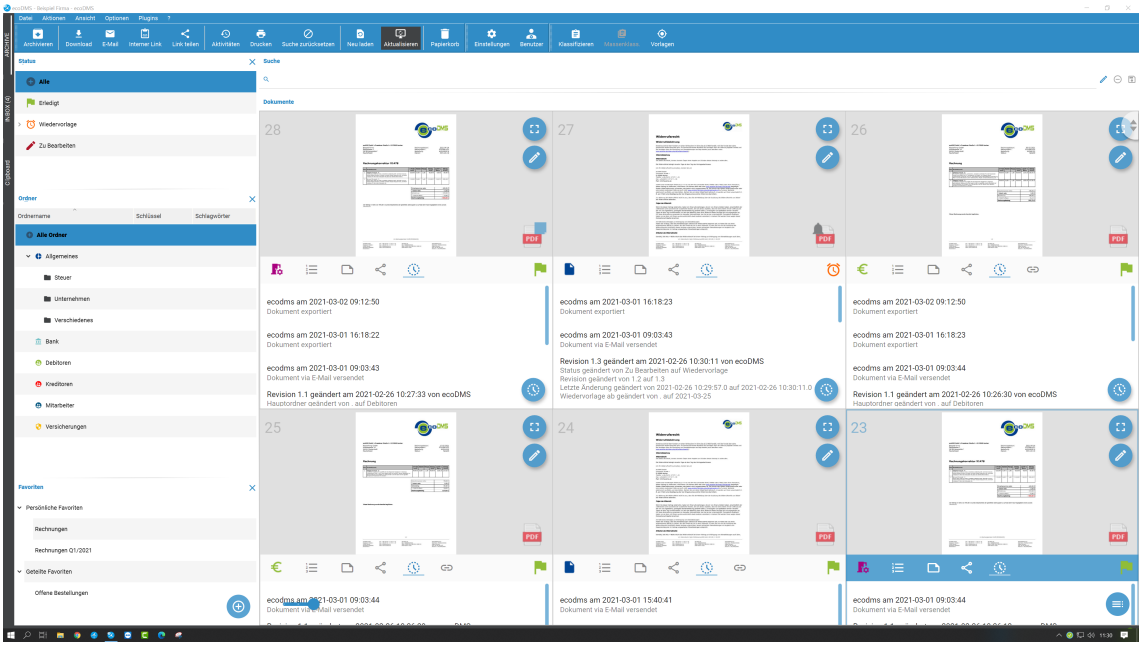


Figure 25.1: Document Activities in the Card View

25.1 Display Activities

Note: You need the appropriate system permission to view a document's activity log.

There are two ways to view the activities related to a document, depending on the interface you are using. Follow these steps:

1. Wählen Sie das gewünschte Dokument aus.
   a) Card View:

      Open the document card and switch to the "Activities" tab.

   b) Table View:

      Open the preview window and click on the "Activities" tab.

25.2 View History

Note: To view a document's history, you must have the appropriate system permission.

The dialog for viewing the history can be accessed in different ways. Choose the option that suits you best:

1. Select a document
   a) Card view: "Activities" tab -> "Show document history" icon
   b) Table view: Right-click -> Activities
   c) Table view: Preview window -> "Activities" tab -> "Show Document History" icon
   d) Toolbar: "Activities" icon

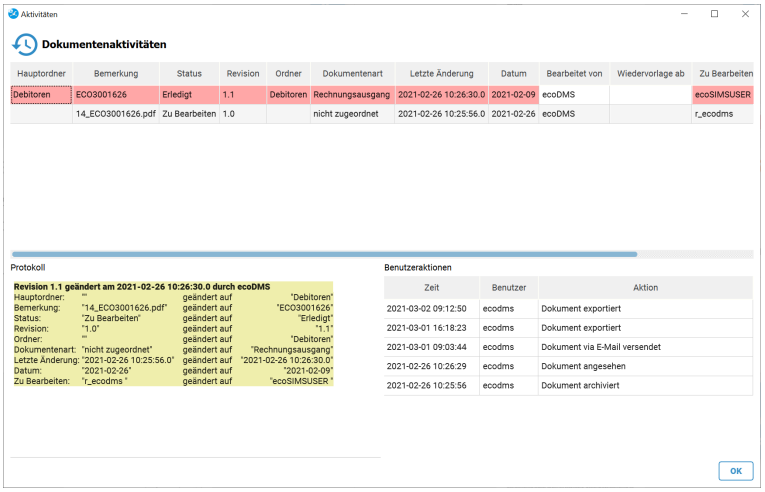


Figure 25.2: Document Activities (History) - dialog

26 Trash and Erasure Features

ecoDMS offers a multi-step erasure process that aligns with the legal requirements for data protection and GoBD. As a result, archived documents and users can be erased when needed. Initially, the affected documents are moved to a virtual trash. Depending on the retention period and user rights, authorized users can later erase the documents permanently.

26.1 Trash

With the "Move to Trash" feature, you can remove documents no longer needed from the main view.

- **Moving and Restoring Documents:** If a user has the permission to classify a document, they can also move it to the trash and restore it from there.
- **Trash is not permanent erasure:** Documents moved to the trash are not erased, but only placed in a virtual trash.
- **Search Features in the Trash:** You can also use the search functions of ecoDMS in the trash.
- **Classification in the Trash:** Documents cannot be classified in the trash. To change the classification, you must first restore the document from the trash.
- **Deleting Folders:** When documents are moved to the trash, the classification and folder assignment remain. If you want to delete the folder, all associated documents—both in the main view and in the trash—must be reclassified into another folder. This requires restoring the documents from the trash first. Reclassification is not possible in the trash.

26.1.1 Starting and Exiting the Trash View

Click the trash icon in the ecoDMS toolbar to switch between the standard view and the trash view.

	Trash view off (standard view active)
	Trash view active (only documents from the trash visible)

26.1.2 Moving Documents to the Trash

There are several ways to move documents to the trash:

1. Select documents:

a) If you want to select multiple documents, hold down the CTRL key while clicking the documents.

2. In the table view:
   a) Right-click -> "Move to Trash"
   b) Menu: File -> "Move to Trash"
   c) Shortcut: CTRL + Del
3. In the card view:
   a) Menu: File -> "Move to Trash"

26.1.3 Restoring Documents

To restore documents from the trash, you also have several options:

1. Select documents:
   a) If you want to select multiple documents, hold down the CTRL key.
2. Right-click -> "Restore"
3. Menu: File -> "Restore"
4. Shortcut: CTRL + Ins

26.2 Erase Documents

> This feature is only available in the full version of ecoDMS. It can be tested in the demo version, but is not included in the Free4Three version.

ecoDMS provides a multi-stage erasure process, enabling authorized users with the appropriate system permission ("The user may erase documents") to permanently erase documents.

1. Erased
2. For Review
3. For Erasure

Stages of the Erasure Process

1. **Move Documents to Trash**
    a) Documents that are no longer needed can be moved from the main view to the trash.
    b) This can be done by any user with the appropriate classification permission.
2. **Respect Retention Periods**
    a) If a retention period is set, the document cannot be erased permanently until this period has expired.
    b) The retention period can be defined individually based on the document type.
3. **Review**
    a) Once the retention period has expired, the document appears in the For Review tab, provided that a review is required for that document type.
    b) In this phase, authorized users can either extend the retention period or release the document for erasure.
4. **Release for Erasure**
    a) After the review is complete, authorized users can release the document for permanent erasure.
    b) The document is then moved to the For Erasure tab.
5. **Final Erasure**
    a) Documents in the For Erasure tab can be permanently erased.
    b) Before erasure, an erasure log must be created, including a PIN code and a re
6. **Erased Documents**
    a) After final erasure:
        i. All text data is anonymized.
        ii. The document is replaced with the erasure log.
    b) Only super administrators with the permission "View all documents regardless of access rights" have access to this information.

26.2.1 Review and Release

In the settings dialog, a review check can be activated in addition to the retention period ("Review before erasure"). After the retention period expires, these documents will appear in the For Review tab of the trash.

Tip: By default, only documents already in the trash are shown. To also display expired documents from the main view, uncheck the "In Trash" checkbox.

26.2.1.1 Check and Modify Retention Periods

1. Open the For Review tab in the trash.
2. Select one or more documents (hold the CTRL key for multiple selections).
3. Choose:
   a) Right-click -> Retention Period, or
   b) Menu -> File -> Retention Period
4. In the dialog, you will see the retention periods for all selected documents.
5. To edit, click on an entry and adjust the retention period.
6. Close the dialog or save the changes.

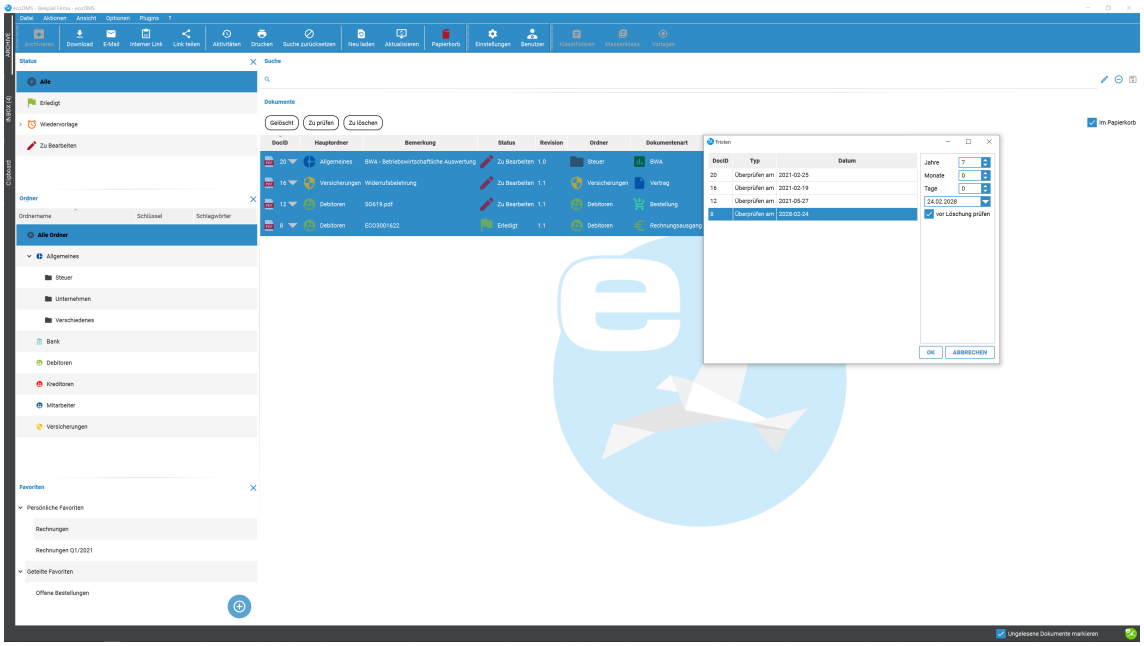


Figure 26.1: Trash - Check Documents and Their Retention Periods

26.2.1.2 Release Documents for Erasure

After successful review, documents can be released for permanent erasure:

1. Select the desired documents in the For Review tab.
2. Right-click -> Release for Erasure.
3. The documents move to the For Erasure tab.

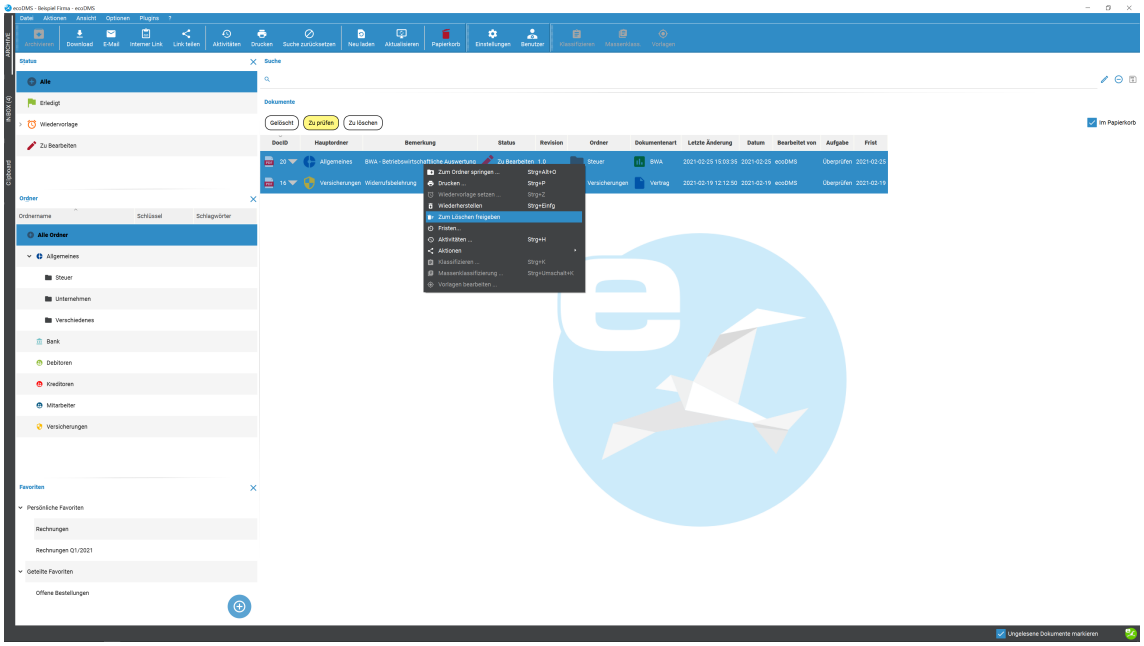


Figure 26.2: Trash - Release Documents for Erasure

26.2.2 Permanently Erase Documents

Documents in the For Erasure tab can be removed and replaced with an erasure log as follows:

1. Select the desired entries (hold the CTRL key for multiple selections).
2. Right-click -> Erase.
3. The dialog "Permanently Erase Document" appears:
   a) **PIN-CODE:** enter
   b) **Confirm PIN-CODE:** The red-highlighted code must be entered here.
   c) **Reason for the erasure:** enter

   > These details will then be displayed in an erasure log, along with the erasure date, time, and the user who performed the action, instead of the document.

   d) Confirm with OK or cancel the action.

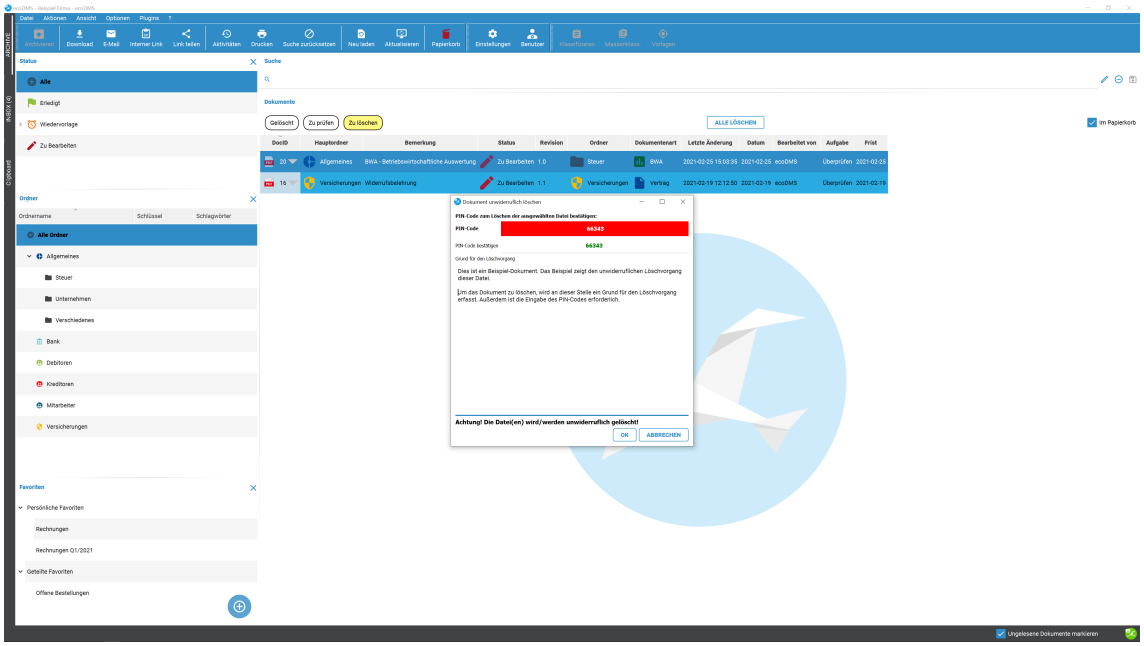


Figure 26.3: Trash: Create Erasure Log

4. After successful erasure, the documents appear in the Erased tab.

Only users with the system permission "View all documents regardless of access rights" (ecoSIMSALLDOCS) can view these entries along with the log.

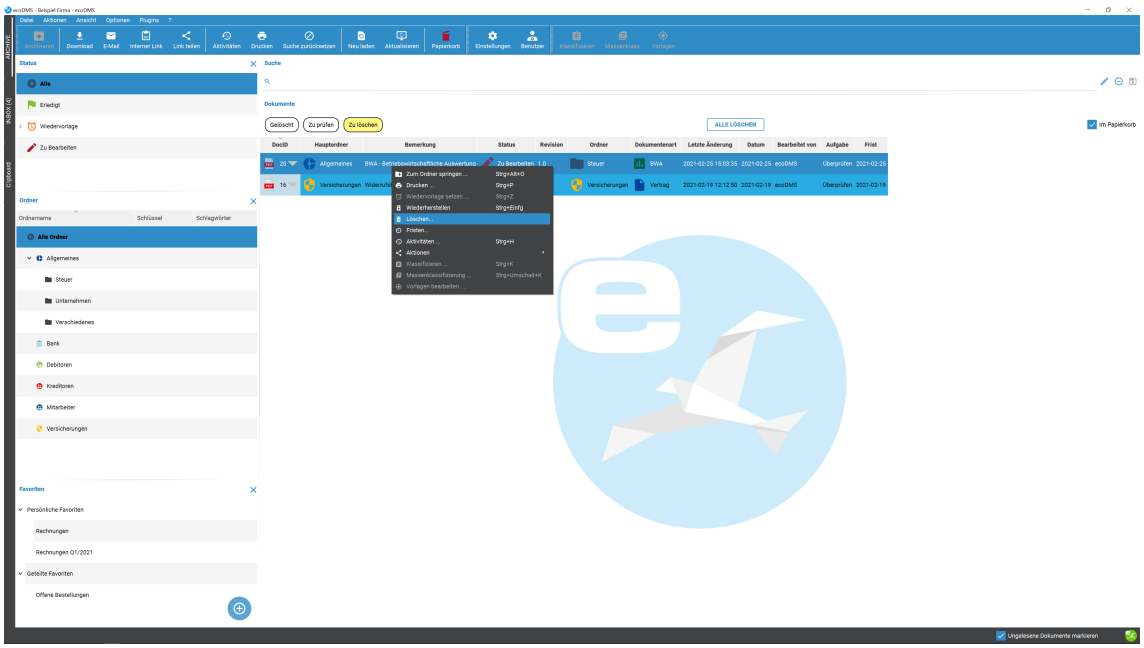


Figure 26.4: Trash: Permanently Erase Documents (Select Feature)

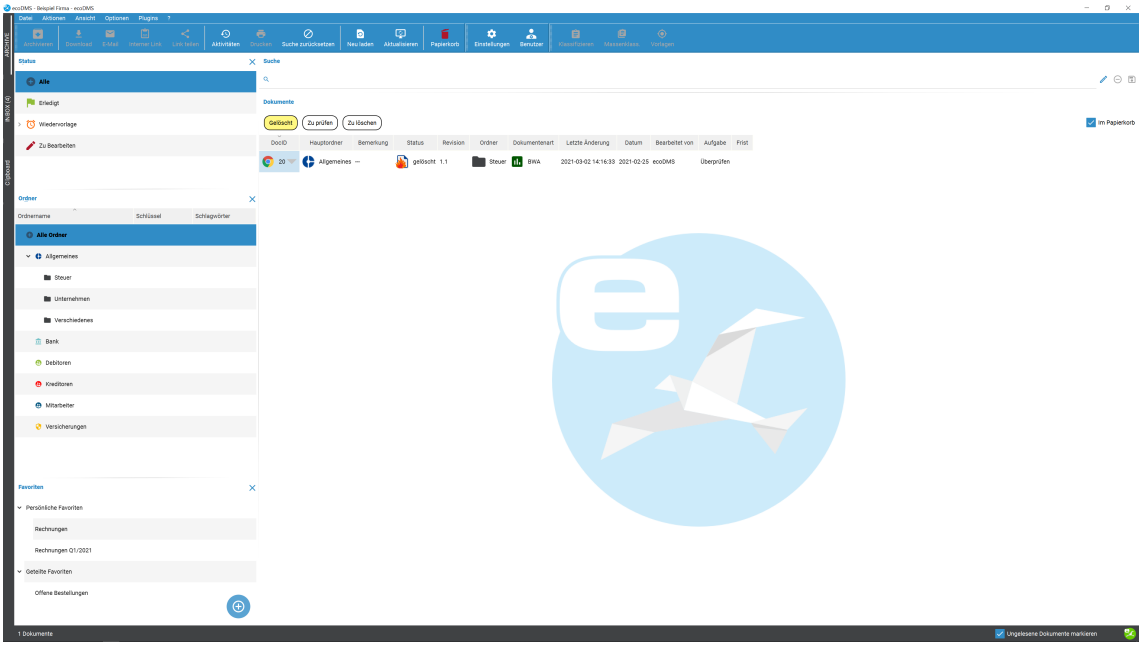


Figure 26.5: Trash: Erased Documents

26.2.3 View Erasure Log

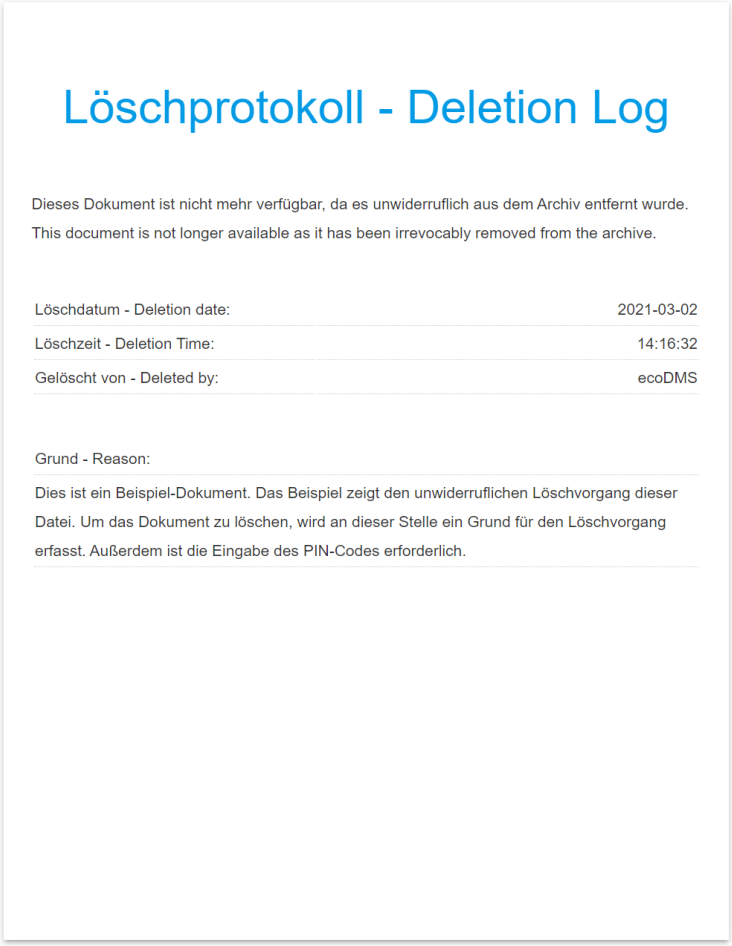
Erased documents are replaced by an erasure log, which contains:

- Erasure date and time
- Name of the executing user
- Reason for the erasure

Additionally, all personal data and content are anonymized (e.g., in the comments field of the classification).

How to View the Log:

1. Go to the Erased tab in the trash.
2. Select the desired document.
3. Execute the View function:
   a) Double-click on the DocID, or
   b) Right-click -> View
4. The log will open as an HTML page in your default browser.



Löschprotokoll - Deletion Log

Dieses Dokument ist nicht mehr verfügbar, da es unwiderruflich aus dem Archiv entfernt wurde.
This document is not longer available as it has been irrevocably removed from the archive.

Löschdatum - Deletion date:	2021-03-02
Löschzeit - Deletion Time:	14:16:32
Gelöscht von - Deleted by:	ecoDMS

Grund - Reason:

Dies ist ein Beispiel-Dokument. Das Beispiel zeigt den unwiderruflichen Löschvorgang dieser Datei. Um das Dokument zu löschen, wird an dieser Stelle ein Grund für den Löschvorgang erfasst. Außerdem ist die Eingabe des PIN-Codes erforderlich.

Figure 26.6: Trash: Erasure Log

27 Send Document via Email

To send archived documents from ecoDMS as email attachments, complete the following steps:

1. Select

- Depending on the application, you cannot send attachments directly from ecoDMS. This is not an error in ecoDMS. For more information on this topic for Ubuntu, please refer to https://bugs.launchpad.net/ubuntu/+source/xdg-utils/+bug/1019259. As a workaround, the administrator can deposit a script for opening the mail client in the settings dialog, where it is available for all users (c.f. "Settings" chapter).
- You can only rename the email attachment before sending if you have a Windows client.

the documents

a) Press and hold the CTRL key to select several documents at once

2. Select the function "Send Document via Email" with one of the following options
   a) Card view: "Actions" tab - Send Document via Email
   b) Menu -> Actions -> Send Document via Email
   c) Toolbar: "Email" icon
   d) Table view: Preview window ->"Actions" tab - Send Document via Email
   e) Table view: Right-click -> Actions -> Send Document via Email
   f) Keyboard shortcut: CTRL+ M
3. If you are using Windows as your operating system, you can now rename the file
   a) To rename a file, simply double-click the name, enter the new name and confirm with "Enter"
   b) Confirm your entries with "OK" to continue, or abort the process with "Cancel"
4. ecoDMS opens the default email programme of your computer and attaches the file in the message window

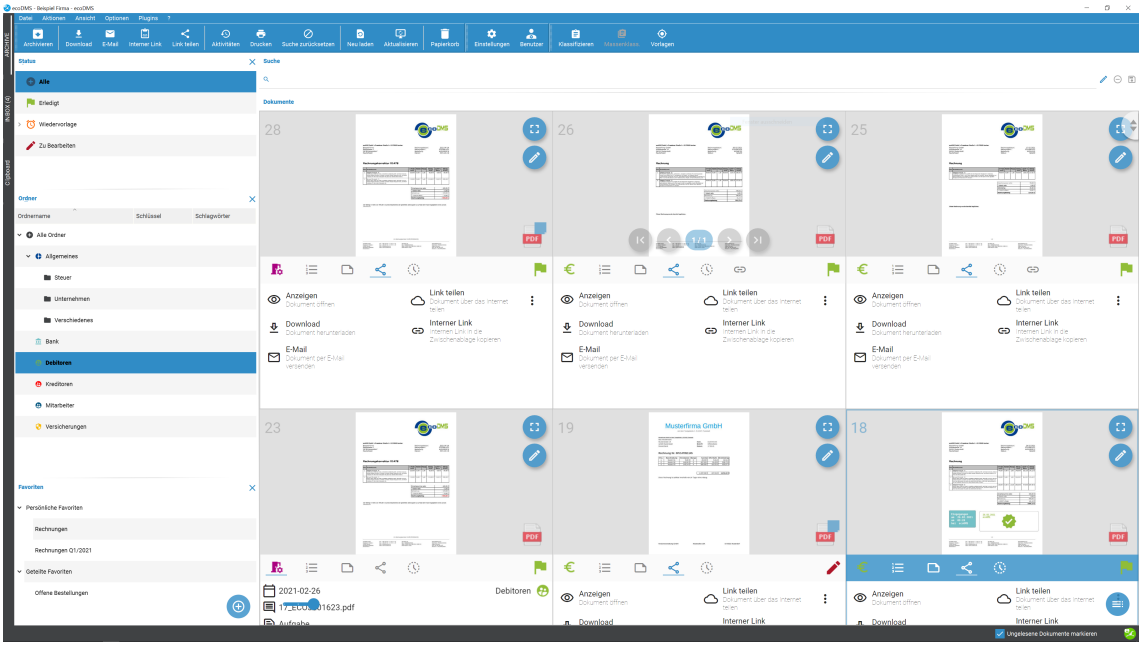


Figure 27.1: Actions - Send Document via Email



Figure 27.2: Icon - Send Document via Email

28 Resubmission / Reminder

With the reminder feature in ecoDMS, you can mark documents that you want to review or edit at a later time. Here's how it works:

1. Set status: Select the "Reminder" status in the classification.
2. Set date: Enter the date when you would like to be reminded about the document.

ecoDMS will automatically highlight the document at the chosen time, ensuring you can review it in a timely manner.

Reminder Phases: ecoDMS reminds you of the document shortly before the deadline. When this is the case, a resubmission icon is displays for the DocID. The document also displays automatically under the "To Do" status before the deadline. In the table view, the document row is also highlighted in Color.

Icon and Color	Days untill Resubmission
none	>7
	<=7
	<=3
	<1 (in addition, the document appears under the status "ToDo")

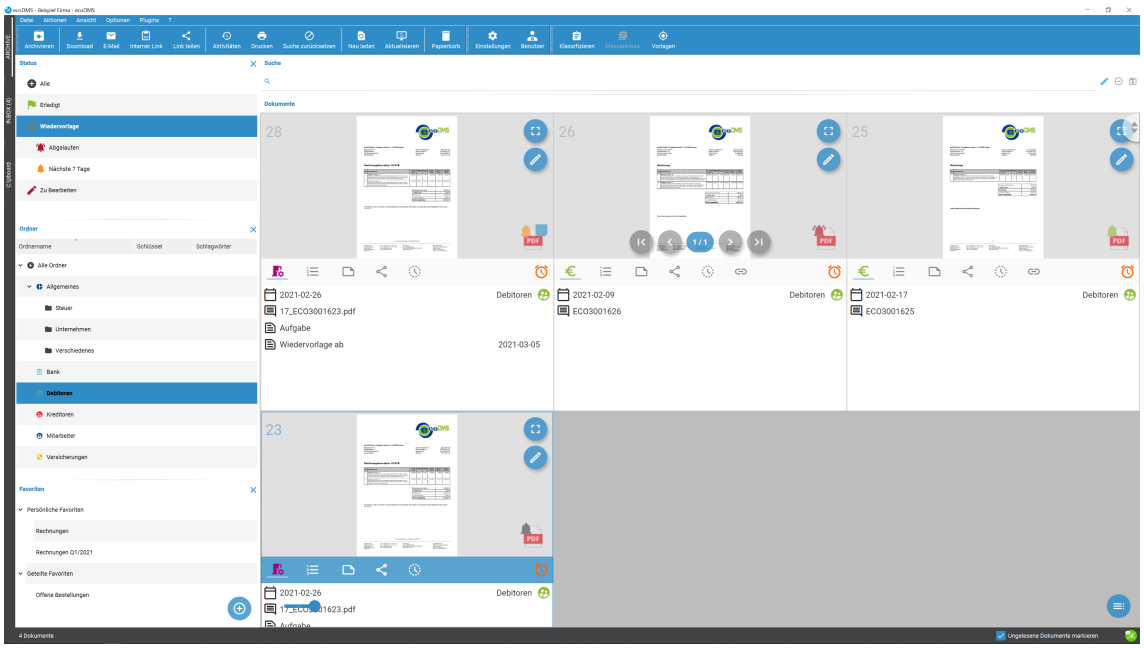


Figure 28.1: Resubmission phases (Here: Card View)

28.1 Set Resubmission Date

There are several options for resubmitting a document: Choose from the following options:

1. Classification dialog:
    a) Open the Classification dialog of the respective document
    b) Set the status to "Resubmission"
    c) Select the resubmission date in the calendar and confirm your entry with "OK"
2. Menu:
    a) Select the documents.
        i. Press and hold the CTRL key to select several documents at once
    b) Click "File - Set Resubmission" in the menu or
    c) Select the resubmission date in the calendar and confirm your entry with "OK"
3. Table view:
    a) Select the documents.
        i. Press and hold the CTRL key to select several documents at once.
    b) Right-click - Set Resubmission
    c) Select the resubmission date in the calendar and confirm your entry with "OK"
4. Status window (drag & drop):
    a) Select the documents.

i. Press and hold the CTRL key to select several documents at once.

b) Drag and drop documents to the "Resubmission" status

c) Select the resubmission date in the calendar and confirm your entry with "OK"

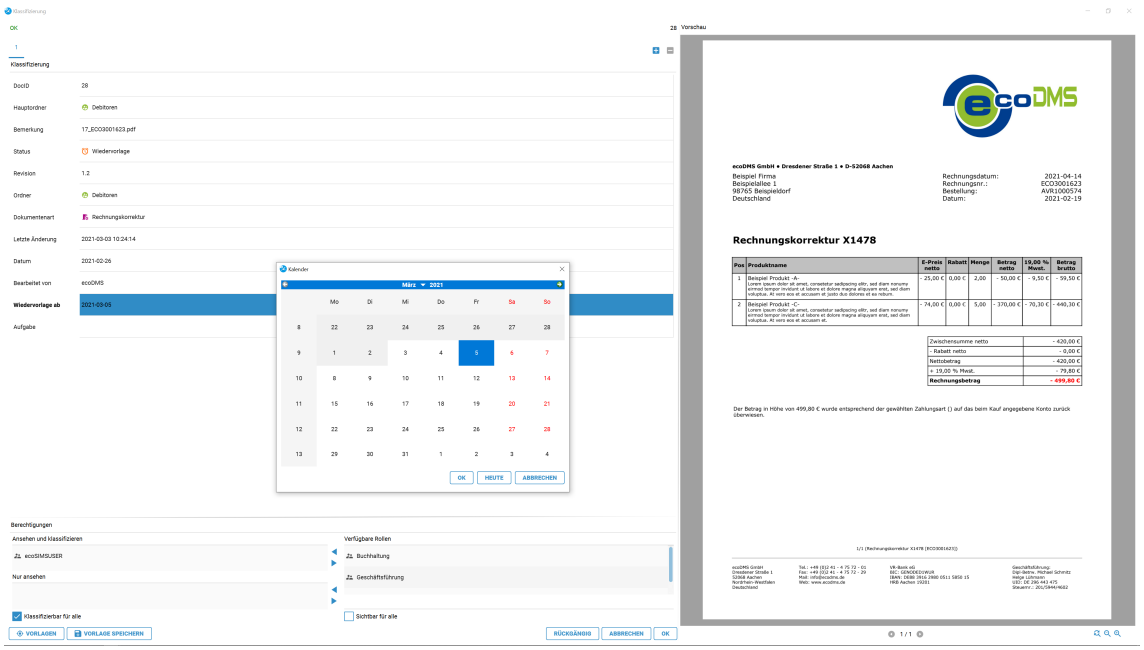


Figure 28.2: Set Resubmission Date (Here: Classification dialog)

28.2 Display Resubmissions on Launch

When starting ecoDMS, due reminders can be automatically displayed in a notification dialog. This feature is activated centrally via the settings dialog and can be configured by the responsible administrator for all users. For more information on how to enable this function, see 7.4.1.8

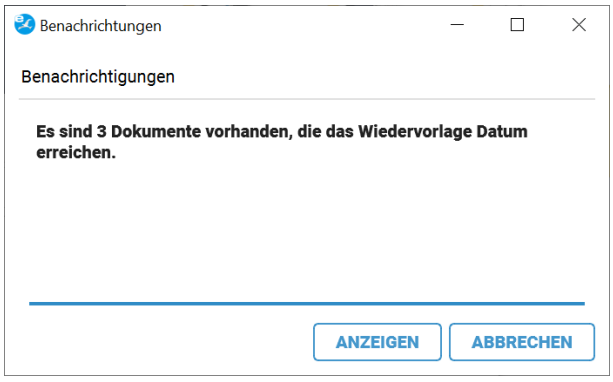


Figure 28.3: Display Resubmission on Launch (Here: Notification)

29 Print Documents (Paper)

- **This feature is only available under Windows.**
- The documents must be printable files.
- The necessary programmes to open the files must be on your computer.
- To start the printing process, the documents are opened consecutively and then closed automatically.

Selected documents can be printed on paper straight from ecoDMS. To do so, there is a print function in ecoDMS under Windows. Click the following menu items to call the print function:

1. Select the documents.
    a) Press and hold the CTRL key to select several documents at once.
2. Select the "Print" function using one of the following options:
    a) Toolbar: "Print" icon
    b) Menu -> File -> Print
    c) Table view: Right-click -> Print
    d) Keyboard shortcut: CTRL + P



Figure 29.1: "Print" icon

30 Snapshot

With the "Snapshot to Archive" feature, you can take screenshots of your workspace and immediately archive them in ecoDMS. This feature is built into the ecoDMS Connection Manager and can be activated using a custom keyboard shortcut. You can capture any area of the screen as a snapshot. The captured image is then saved as a searchable PDF in ecoDMS. It is also possible to recognize and apply classification templates during this process.

30.1 Configure Snapshot Shortcut

To use the snapshot feature, you need a keyboard shortcut. To create a shortcut, complete the following steps:

1. Open the Connection Manager to manage the profiles (refer to manual: 5.1)
2. Click "Settings"
3. Assign a keyboard shortcut for the snapshot feature of ecoDMS (for example: Alt Gr + F8)
4. Click "OK" to save the settings or click "Cancel" to abort the process

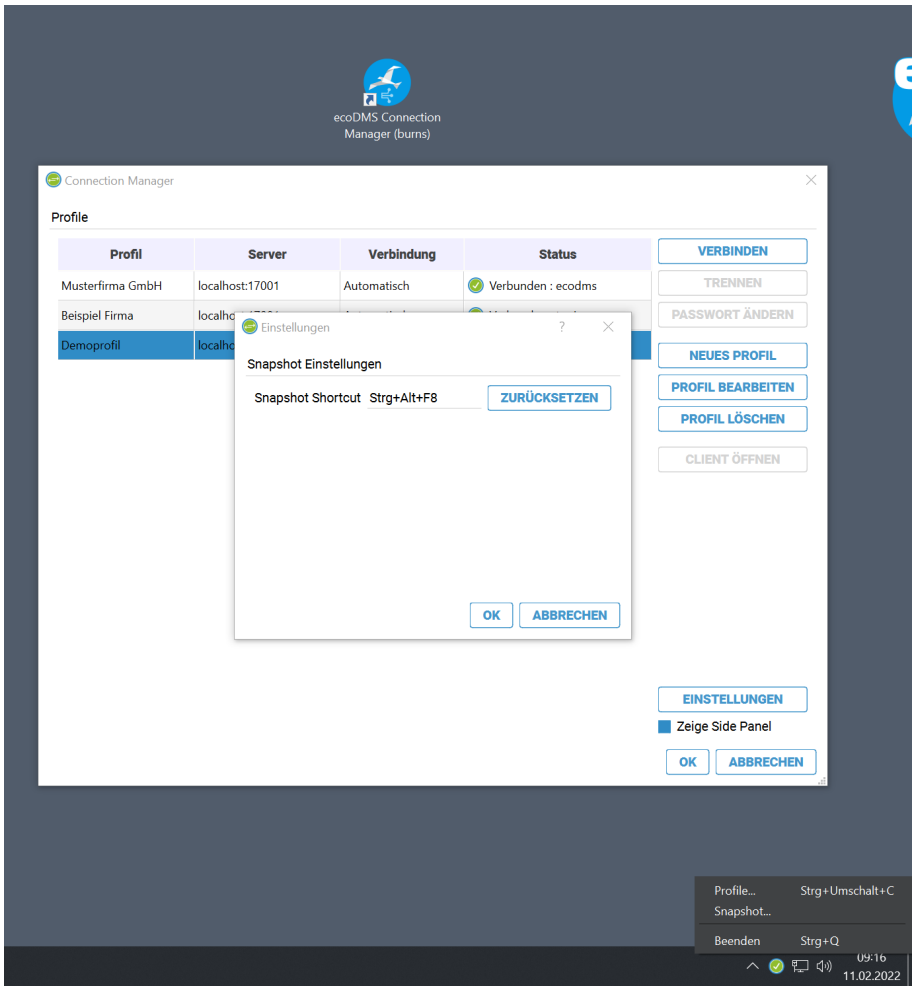


Figure 30.1: Snapshot - Settings for Assigning a Shortcut in the Connection Manager

30.2 Create Snapshot

To create a snapshot on your screen, comlete the following steps:

1. Open the application or website where you want to create a snapshot.
2. Press the configured shortcut for "Snapshot 2 Archive"
3. The screen is highlighted
4. Now select the area you want to snapshot by holding the mouse button, or press ESC to cancel
5. ecoDMS creates a snapshot of the highlighted section in white and opens the classification dialog box
6. Fill in the classification information
    a) If the snapshot matches an existing classification template, automatic classification / archiving is also available (refer to: 14)
7. When archiving, ecoDMS stores the snapshot image as a searchable PDF so you can use readable information in full-text searches

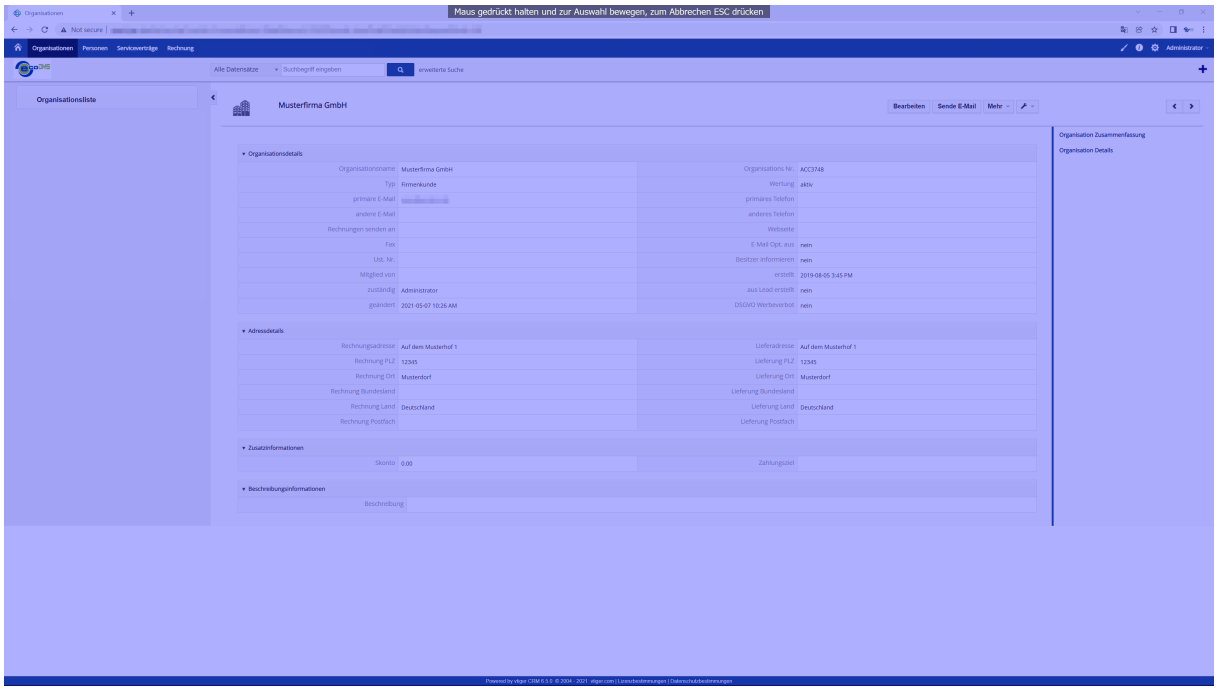


Figure 30.2: Snapshot - Highlighted Screen after Entering the Shortcut

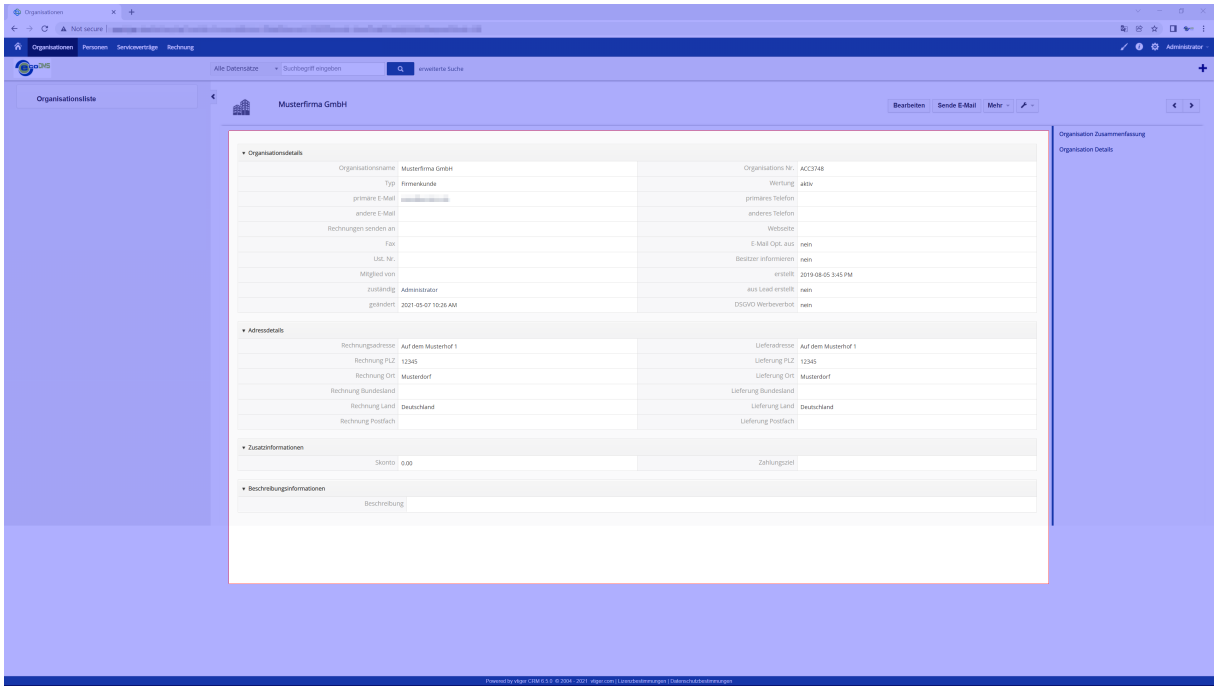


Figure 30.3: Snapshot - Selected Area for Archiving in ecoDMS

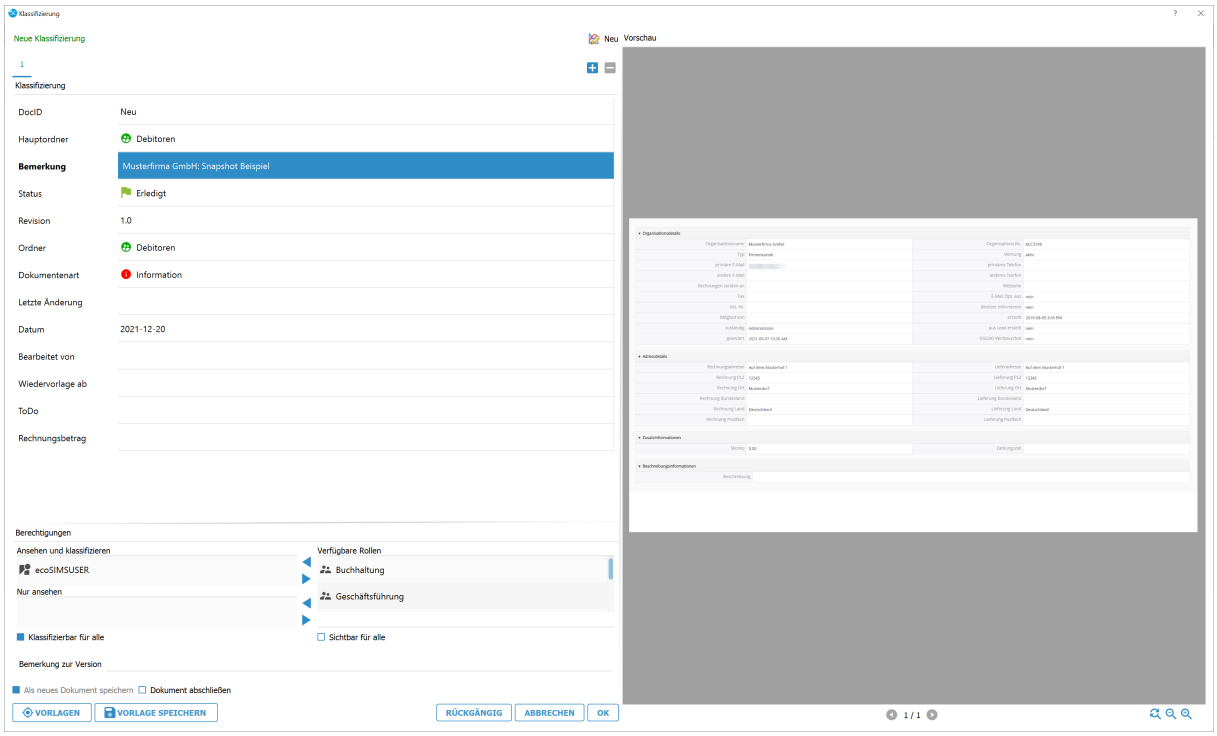


Figure 30.4: Snapshot - Classification of the Selected Area for Archiving in ecoDMS

31 Backup

ecoDMS includes various functions for backing up data. You can backup your data manually or the system can create a backup fully automatically. Depending on the operating system and your own needs, you can choose from individual backup functions in ecoDMS.

31.1 Important Notes

1. We recommend you backup your data every day.
2. You should store the data backup on an external data carrier.
3. While you run the data backup, no other users should be working with ecoDMS or be connected to ecoDMS Server.
4. The size and the time to complete the backup depends on the amount of data / data size. Depending on the data volume this operation can take a while.
5. Ensure that enough space is available on the destination path to save your backup.
6. ecoDMS saves all settings, user data and classifications in a database.
    a) We use the free, cross-platform postgreSQL component as a database.
    b) The archived files and documents are stored safely encoded in containers within the user's ecoDMS server.
7. The default data volume of such a container is approx. 500 MB. This is a fixed value specified by ecoDMS.
    a) As soon as the data volume is reached, the system automatically creates a new container.
8. During the backup process the containers can be backed up separately and independent of the postgreSQL database.
9. In the settings dialog, you can configure automated, time-controlled backups.
    a) ecoDMS then performs the backup automatically at the specified time.
    b) Data backups can be configured as required.
        i. For example, you can make a full backup of the entire database and the containers.
        ii. Alternatively, you can also make an incremental data backup. In this case ecoDMS will complete the existing backup with the latest changes in the selected rhythm.
10. The oneClick Backup component is an inherent part of ecoDMS Server installation.
    a) With a mouse-click you can manually initiate a full backup of the entire database and container.

b) The generated backup file (.zip) can be used to restore data if necessary.

11. As an option, the backup and restore function can also be carried out via console applications.
    a) To do this, either use the integrated ecoDMS script or create your own scripts to call this feature.
12. We recommend you completely clear the Inbox before backing up your data.
    a) Background: If the backup is restored on a different operating system (e.g. Windows -> Linux), the paths to the files in the Inbox are no longer correct. You can only delete them from the server via the dialog which displays.

31.2 Automatic Backup

In the settings dialog, you can configure automated, time-controlled backups. ecoDMS then performs the backup automatically at the specified time. Data backups can be configured as required. For example, you can make a full backup of the entire database and the containers. Alternatively, you can also make an incremental data backup. In this case ecoDMS will complete the existing backup with the latest changes in the selected rhythm.

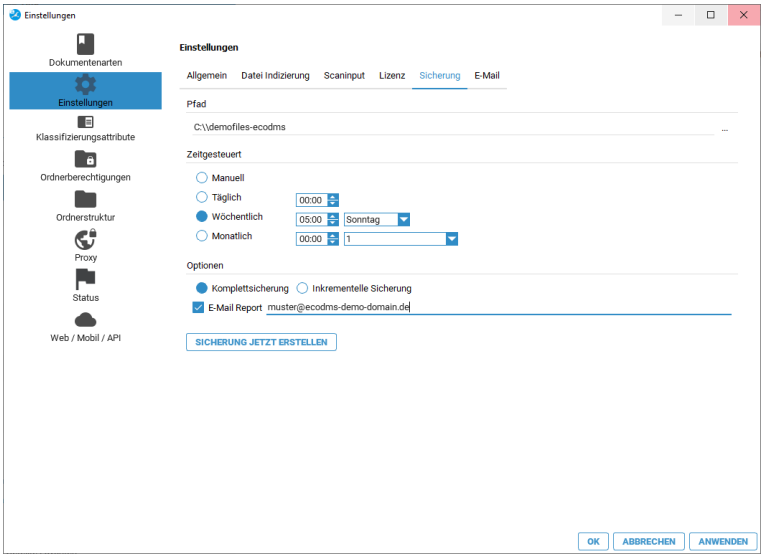


Figure 31.1: Settings dialog - Backup

This section describes possible settings for automatic backup.

1. Click "Options - Settings" in ecoDMS Client.
2. Now click "Settings" and open the "Backup Tab".
    a) Make the required settings in this window.
3. **Path for Windows and Linux distributions:** Select the target path for saving backups. ecoDMS saves the backups you create in the selected folder. ecoDMS Server provides the local data carriers for storing backups.
    a) **Target Path for NAS systems via Docker image:** If you want to use the ecoDMS backup and restore function on your NAS, you require a folder for backup and restore (see installation manual). The backup and restore

folders should be stored separately from the actual ecoDMS data and backed up accordingly. The mount paths are:

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

i. In the settings dialog of ecoDMS Client, select the "/srv/data/backup" path on the "Backup" tab and confirm with a double-click.

ii. The Path box should then display the entry "/srv/data/backup".

4. Select the intervals for your data backup.
   a) **Manually:** Enable this setting to manually start the data backup. In this case the backup is created when you click the "Create Backup Now" button.
   b) **Daily:** Enable this setting to execute the backup process every day at the same time.
      i. Enter the time at which you want ecoDMS to backup the data.
   c) **Weekly:** Enable this setting to execute the backup process every week on the same day and at the same time.
      i. Enter the time at which you want ecoDMS to backup the data.
      ii. Select the weekday.
   d) **Monthly:** Enable this setting to execute the backup process every month on the same day and at the same time.
      i. Enter the time at which you want ecoDMS to backup the data.
      ii. Select the day of the month.
5. Enable the type of backup you require. For example, you can make a full backup of all containers. Alternatively, you can also make an incremental data backup.
   a) **Full backup:** If you enable a full backup, ecoDMS executes a backup of all containers at the specified time.
      i. The backup file is saved in the selected folder as a ZIP file.
      ii. The duration of the data backup depends on the data volume of the archived files and the information.
      iii. This type of data backup may be relatively time-consuming because ecoDMS makes a full backup of the database and all containers.
   b) **Incremental backup:** If you enable the incremental backup, ecoDMS executes the data backup step-by-step. In this case ecoDMS completes the existing backup with the latest changes in the selected intervals.
      i. The incremental backup only saves the data that was changed or added since the last backup.
      ii. If you execute the incremental backup, ecoDMS creates five files/folders plus subfolders in the target folder of the backup:
         A. data, ocr, workdir, backup.sql, version
         B. These files/folders are extended during the next incremental backup and must therefore not be moved, renamed or deleted.

iii. The backup file is saved in the selected folder as an unzipped folder.

iv. To restore this incremental backup again,

A. select these files/folders

B. and create a ZIP file via the context menu.

v. You can use this ZIP file to restore the entire ecoDMS archive.

vi. The duration of the data backup depends on the size of the archived files and the information.

vii. The first execution of the incremental backup may take longer because ecoDMS makes a full backup of the entire database and all available containers.

A. ecoDMS then adds the latest changes and new data to the existing backup in the specified rhythm.

6. **Email Report:** If you enable this feature, ecoDMS sends a process report to the specified recipient after the backup has been executed. You must enter the mail server information on the "Email" tab in the settings dialog (Options - Settings - Settings - Email). ecoDMS sends a report to the recipient(s) via email as soon as the backup has finished.

a) Enter the recipient email address in the entry box. For example:

```
sample@demomail.de
```

b) Separate several email recipients with a semicolon ";". Example:

```
first@demomail.de;second@demomail.de
```

7. **Create backup now:** Click "Create Backup Now" to immediately start the configured data backup (full or incremental backup) regardless of the set interval.

8. Save your settings by clicking "Apply" or abort the process with "Cancel"

9. To close the settings dialog, click the "OK" button.

31.3 Backup under Windows

In the following the data backup process is described for Windows systems.

31.3.1 oneClick Backup (Software)

The ecoDMS oneClick Backup software is an inherent part of ecoDMS Server. With a mouse-click you can manually initiate a full backup of the entire database and container. In this case, the entire ecoDMS database, including all documents, structures, settings, users and attributes etc. are saved in a ZIP file. The generated backup file (.zip) can be used to restore data if necessary.

1. Make sure that no other users are working with ecoDMS or are connected to ecoDMS Server.

a) First, exit all Connection Managers connected to the server.

b) Check and close all other connections to the server (e.g. web client...).

2. Start the "oneClick Backup" programme via "Start -> Programme -> ecoDMS Server -> oneClick Backup"
3. The dialog "oneClick Backup & Recovery" window opens.
4. Click the "..." button to select a destination folder for the data backup. After the data backup has successfully executed, the backup data is stored in a Zip file in the destination folder.
5. You can specify the compression type in the "Compression" area.
   a) Default

   Automatic Mode: In this mode, the system automatically specifies a compression rate.

   b) Best speed:

   The backup is compressed faster than in the default speed. However, in this mode the zip file is larger than in the default mode.

   c) Best compression:

   The backup data is compressed to the smallest possible size. Because of the extreme compression, this backup setting needs much more time than the Default and the Best Speed modes.

   d) No compression:

   The backup is generated without compression. This is the fastest data backup option. Because the data is not compressed, the completed backup might have a very big data volume and therefore it requires a lot of storage space.

6. Click "Start Backup" to start the data backup.

   a) The duration of the backup depends on the data volume and the system environment. For large data volumes, the backup can take a long time.
   b) The operation is complete when "Finished..." is displayed in the last output line in the dialog.

7. Click "Exit" to close the programme.
8. If the operation was successful, you can reconnect the Connection Manager and all other connections to ecoDMS Server.

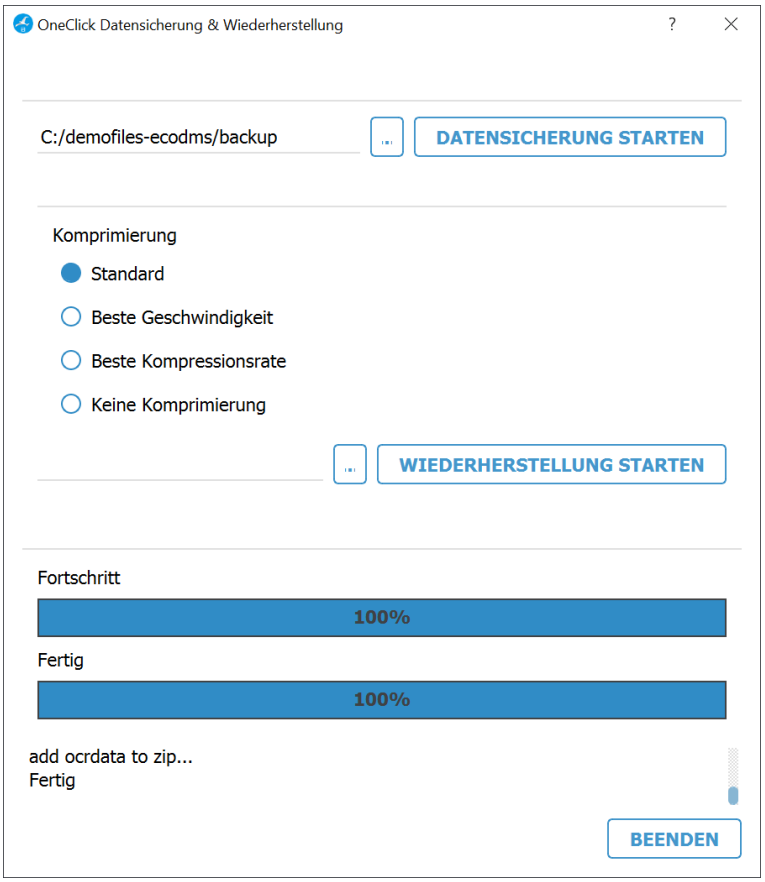


Figure 31.2: oneClick Backup & Restore: Creating Backup

31.3.2 Console Programme for Data Backup

- You must have administrator rights for this programme.
- When the execution runs via the "task planning", you must select the option "Execute with highest privileges".
- Once the server is installed, the programme is located in ecoDMS Server folder.
- You can reimport the backup via "ecoDMS oneClick Backup".

If ecoDMS Server is installed under Windows, a console backup programme is automatically supplied with the oneClick Backup programme. This can be used, for example, for automatic, time-controlled backups.

1. Make sure that no other users are working with ecoDMS or are connected to ecoDMS Server.
   a) First, exit all Connection Managers connected to the server.
   b) Check and close all other connections to the server (e.g. web client...).

2. Syntax-Request:

```
ecoDMSBackupConsole.exe [Backup-Save-Path] [optionally: Compression Rate]
```

3. Parameters:
   - /h displays the programme syntax.
   - Parameter 1 must be a valid folder path. The backup is saved in this folder.
   - Parameter 2 is optional. The compression rate can be selected here.
     - If no parameter is set, the data is zipped with the "default" compression.
     - You can select the following values. The "OneClick Data Backup" chapter provides further explanations.
       * best (best compression)
       * bestspeed (best speed)
       * no (no compression)
4. If the operation was successful, you can reconnect the Connection Manager and all other connections to ecoDMS Server.

31.4 Backup under Linux

In the following the data backup process is described for Ubuntu / Debian systems.

31.4.1 oneClick Backup (Software)

The ecoDMS oneClick Backup software is an inherent part of ecoDMS Server. With a mouse-click you can manually initiate a full backup of the entire database and container. In this case, the entire ecoDMS database, including all documents, structures, settings, users and attributes etc. are saved in a ZIP file. The generated backup file (.zip) can be used to restore data if necessary.

1. Make sure that no other users are working with ecoDMS or are connected to ecoDMS Server.
   a) First, exit all Connection Managers connected to the server.
   b) Check and close all other connections to the server (e.g. web client...).
2. Start the "ecoDMS oneClick Backup" programme as "root" user via the console or via the programme manager:
   a) If you start the programme via the console, you must execute the following command as **root**

```
/opt/ecodms/ecodmsserver/tools
```

3. The dialog "oneClick Backup & Recovery" window opens.
4. Click the "..." button to select a destination folder for the data backup. After the data backup has been successfully executed, the backup data is stored in a Zip file in the destination folder.

5. You can specify the compression type in the "Compression" area.
   a) Default

      Automatic Mode: In this mode, the system automatically specifies a compression rate.

   b) Best speed:

      The backup is compressed faster than in the default speed. However, in this mode the zip file is larger than in the default mode.

   c) Best compression:

      The backup data is compressed to the smallest possible size. Because of the extreme compression, this backup setting needs much more time than the Default and the Best Speed modes.

   d) No compression:

      The backup is generated without compression. This is the fastest data backup option. Because the data is not compressed, the completed backup might have a very big data volume and therefore it requires a lot of storage space.

6. Click "Start Backup" to start the data backup.

   a) The duration of the backup depends on the data volume and the system environment. For large data volumes, the backup can take a long time.
   b) The operation is complete when "Finished..." is displayed in the last output line in the dialog.

7. Click "Exit" to close the programme.
8. If the operation was successful, you can reconnect the Connection Manager and all other connections to ecoDMS Server.

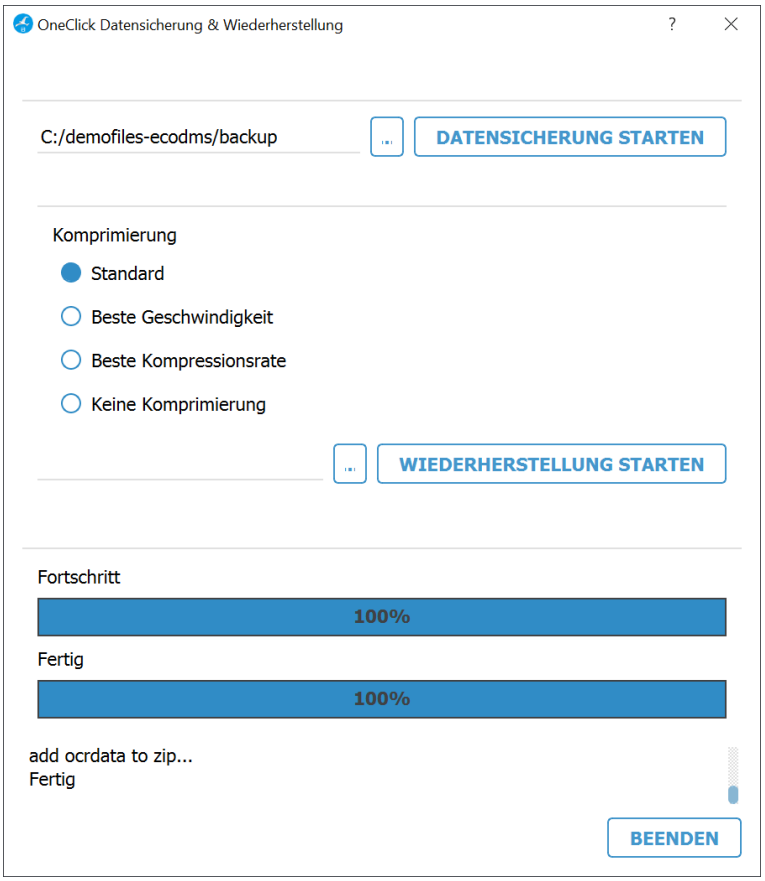


Figure 31.3: oneClick Backup & Restore: Creating Backup

31.4.2 Console Programme for Data Backup

When installing ecoDMS Server, a file called "ecoDMSBackupConsole" is stored under Ubuntu/Debian in the /opt/e-codms/ecodmsserver/tools folder. When this script executes, it creates a backup of the folder /opt/ecosims/workdir and creates a dump for the database (backup.sql). The files are then saved in a pre-defined destination folder as a zip-file.

1. Make sure that no other users are working with ecoDMS or are connected to ecoDMS Server.
   a) First, exit all Connection Managers connected to the server.
   b) Check and close all other connections to the server (e.g. web client...).

   The following commands must be run as root.

2. 2. For data backup, enter the following command at /opt/ecodms/ecodmsserver/tools:

```
./ecoDMSBackupConsole /TargetPath [best|bestspeed|no]
```

   a) The brackets contain the optional parameters for the compression. The degree of compression influences the duration of the compression process.

i. best: the backup is packed with the highest degree of compression
ii. bestspeed: the backup is packed with the fastest compression
iii. no: the backup is packed without compression
iv. If no parameter is given, the data is packed with the default compression.

3. The backup can be recovered as a zip-file using the oneClick Backup, or manually after the zip-file has been extracted.

31.5 Backup under Synology (NAS)

The following describes how to backup ecoDMS data on a Synology NAS system.

1. Start the ecoDMS container if it is not already running.
2. Make sure that no other users are working with ecoDMS or are connected to ecoDMS Server.
   a) First, exit all Connection Managers connected to the server.
   b) Check and close all other connections to the server (e.g. web client...).
3. Open the "backup" folder in the "File Station" of the ecoDMS data folder.
4. Create an empty file "create" and upload it to the "backup" folder.
5. Backup will start automatically after a few seconds.
6. The system then automatically saves the finished backup file in this folder.
7. The system automatically deletes the "create" file after the backup has been processed successfully.

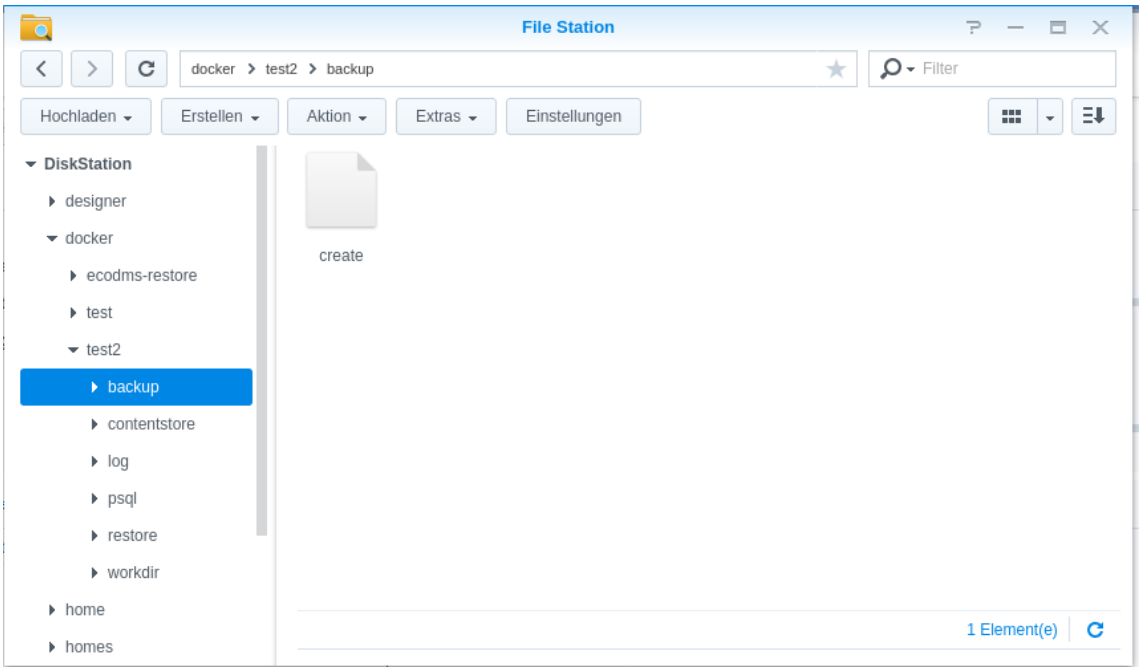


Figure 31.4: Synology - Create Backup

31.6 Backup under QNAP (NAS)

The following describes how to backup ecoDMS data on a Synology QNAP system.

1. Start the ecoDMS container if it is not already running.
2. Make sure that no other users are working with ecoDMS or are connected to ecoDMS Server.
   a) First, exit all Connection Managers connected to the server.
   b) Check and close all other connections to the server (e.g. web client...).
3. Open the "backup" folder in the "File Station" of the ecoDMS data folder.
4. Create an empty file "create" and upload it to the "backup" folder.
5. Backup will start automatically after a few seconds.
6. The system then automatically saves the finished backup file in this folder.
7. The system automatically deletes the "create" file after the backup has been processed successfully.

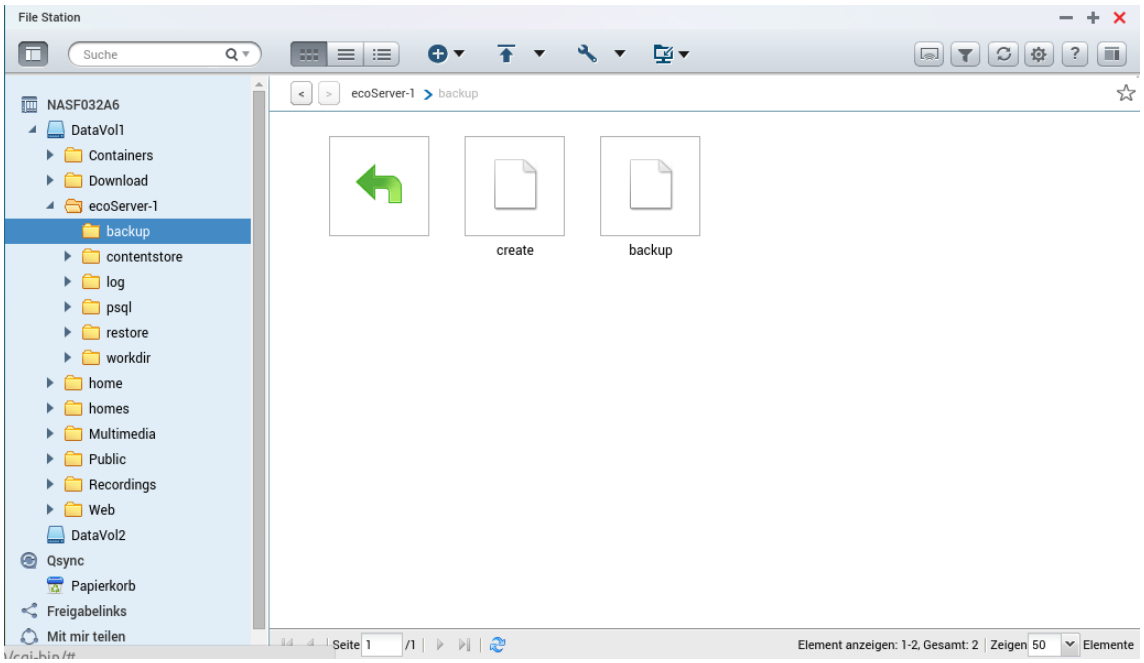


Figure 31.5: QNAP - Create Backup

32 Restore

We recommend you backup your data every day. To do so, you have various options. Under Windows, ecoDMS contains its own user interface to manually backup and restore your data. The backup can also be executed manually with scripts or with your own tools. In this case, you must make a backup of the entire ecoDMS Server folder. If the database is installed separately, it also needs a backup.

1. During the data recovery process, ecoDMS Server is stopped. For this reason, no user should be connected with the system.
2. When the data recovery is imported, the existing data store is deleted irrevocably.
3. The duration of the recovery process depends on the data volume and the system environment. The recovery process may take longer for large data volumes.
4. If you want to restore your data based on an incremental backup, you must first create a ZIP file from the following data of your backup:

   a) data, ocr, workdir, backup.sql, version

      i. select these files/folders

      ii. and create a ZIP file via the context menu.

   b) This ZIP file can then be used for the recovery process.

32.1 Restore under Windows

In the following the data backup process is described for Windows systems.

32.1.1 oneClick (Software)

Use "oneClick Backup" to reimport your ecoDMS data. This programme is automatically installed as well when you install the "ecoDMS Server".

1. Make sure that no other users are working with ecoDMS or are connected to ecoDMS Server.
   a) First, exit all Connection Managers connected to the server.
   b) Check and close all other connections to the server (e.g. web client...).
2. Start the "oneClick Backup" programme via "Start -> Programme -> ecoDMS Server -> oneClick Backup"

3. The dialog "oneClick Backup & Recovery" window opens.
4. Click "..." button to select the zip file with the data backup.
5. Click the "Start Recovery" button to start the data backup.
6. Read the confirmation prompt and confirm with "Yes".
   a) **Please note that a positive confirmation of this message deletes the current database and replaces it with the backup.**
   b) The duration of the recovery depends on the data volume and the system environment. For large data volumes, the recovery can take a long time.
   c) The operation is complete when "Finished..." is displayed in the last output line in the dialog.
7. If the operation was successful, you can reconnect the Connection Manager and all other connections to ecoDMS Server.

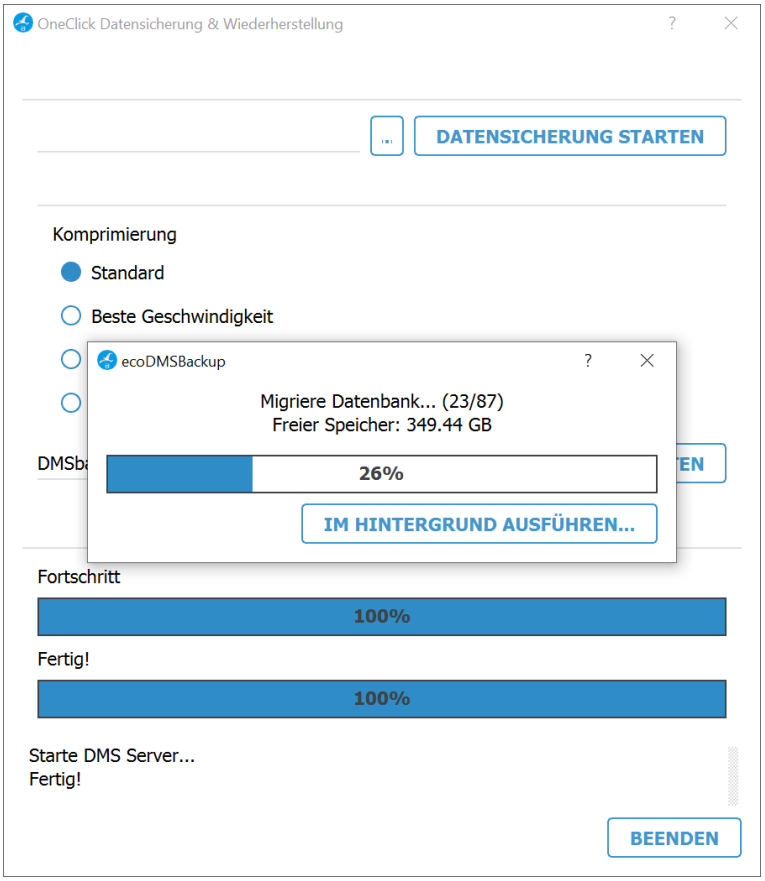


Figure 32.1: oneClick Backup & Restore: Restoring Data

32.2 Restore under Linux

In the following the data recovery process is described for Ubuntu / Debian systems.

32.2.1 oneClick (Software)

Use "oneClick Backup" to reimport your ecoDMS data. This programme is automatically installed as well when you install the "ecoDMS Server".

1. Make sure that no other users are working with ecoDMS or are connected to ecoDMS Server.
   a) First, exit all Connection Managers connected to the server.
   b) Check and close all other connections to the server (e.g. web client...).
2. Start "ecoDMS oneClick Backup" as root in your console or use the software manager:
   a) Software manager:



Figure 32.2: Open ecoDMS oneClick Backup

   b) Console: The following command must be run as root:

```
/opt/ecodms/ecodmsserver/tools
```

3. The dialog "oneClick Backup & Recovery" window opens.
4. Click "..." button to select the zip file with the data backup.
5. Click the "Start Recovery" button to start the data backup.
6. Read the confirmation prompt and confirm with "Yes".
   a) **Please note that a positive confirmation of this message deletes the current database and replaces it with the backup.**
   b) The duration of the recovery depends on the data volume and the system environment. For large data volumes, the recovery can take a long time.
   c) The operation is complete when "Finished..." is displayed in the last output line in the dialog.
7. Click "Exit" to close the programme.
8. If the operation was successful, you can reconnect the Connection Manager and all other connections to ecoDMS Server.

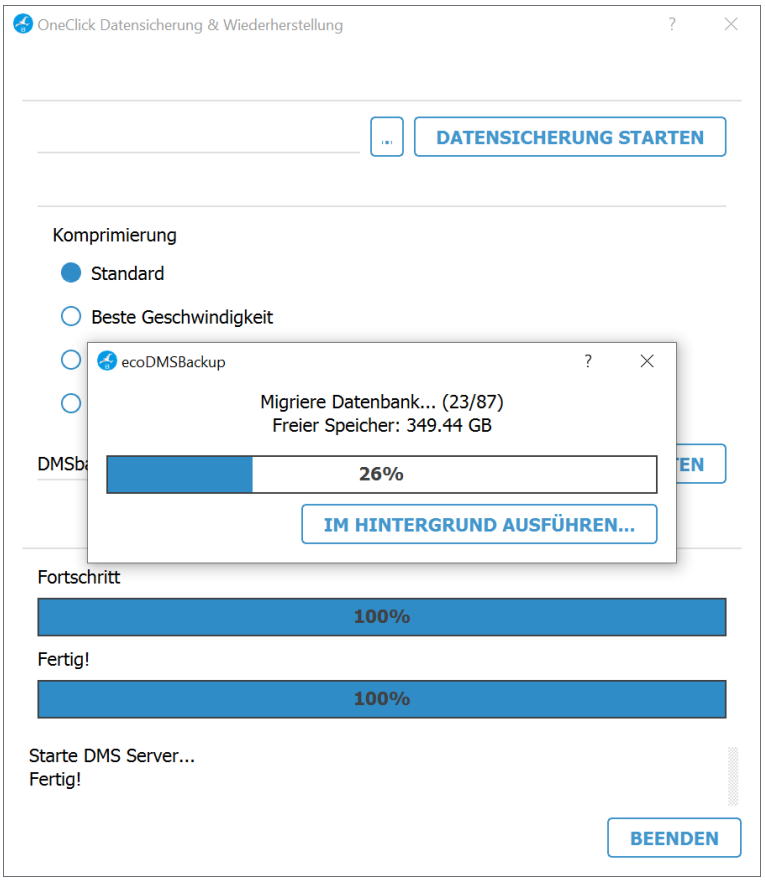


Figure 32.3: oneClick Backup & Restore: Restoring Data

32.2.2 Restore via Console

The following describes how to restore ecoDMS data on a Linux Distribution via Console. The following commands must be run as root.

1. Use the console to open the "tools" folder.

```
/opt/ecodms/ecodmsserver/tools
```

2. Now you need the zip file created via backup. To load the backup, enter the following command:

```
./ecoDMSBackupConsole /PfadzurSicherung.zip restore
```

   a) **Please note that a restore deletes the current database and replaces it with the backup.**

   b) The duration of the recovery depends on the data volume and the system environment. For large data volumes, the recovery can take a long time.

32.3 Restore under Synology (NAS)

The following describes how to restore ecoDMS data on a Synology NAS system.

1. Make sure that no other users are working with ecoDMS or are connected to ecoDMS Server.
    a) First, exit all Connection Managers connected to the server.
    b) Check and close all other connections to the server (e.g. web client...).
2. Stop the ecoDMS container if it is still running.
3. Open the "restore" folder in the "File Station" of the ecoDMS data folder.
4. Copy the backup (created with "oneClick Backup" or "ecoDMSBackupConsole") in the "restore" folder.
5. Rename the backup file to "restore.zip".
    a) Please note the notation (use lower case).
6. Start the ecoDMS container.
7. The data recovery process is executed.
    a) This process may take a while.
    b) If the process is successful, the "restore.zip" file is renamed to "restore-processed.zip".
        i. In case of an error, the system converts the file to "restore-failed.zip".

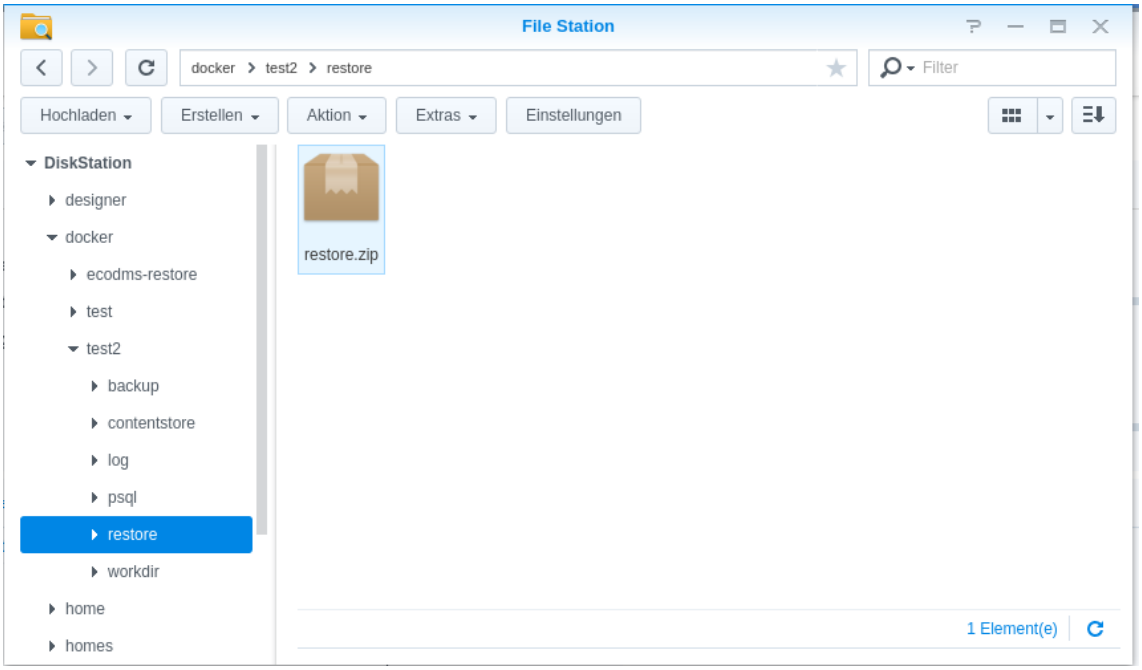


Figure 32.4: Synology - Make Restore

32.4 Restore under QNAP (NAS)

The following describes how to restore ecoDMS data on a QNAP NAS system.

1. Make sure that no other users are working with ecoDMS or are connected to ecoDMS Server.
    a) First, exit all Connection Managers connected to the server.

b) Check and close all other connections to the server (e.g. web client...).

2. Stop the ecoDMS container if it is still running.
3. Open the "restore" folder in the "File Station" of the ecoDMS data folder.
4. Copy the backup (created with "oneClick Backup" or "ecoDMSBackupConsole") in the "restore" folder.
5. Rename the backup file to "restore.zip".
   a) Please note the notation (use lower case).
6. Start the ecoDMS container.
7. The data recovery process is executed.
   a) This process may take a while.
   b) If the process is successful, "restore.zip" file is renamed to "restore-processed.zip".
      i. In case of an error, the system converts the file to "restore-failed.zip".

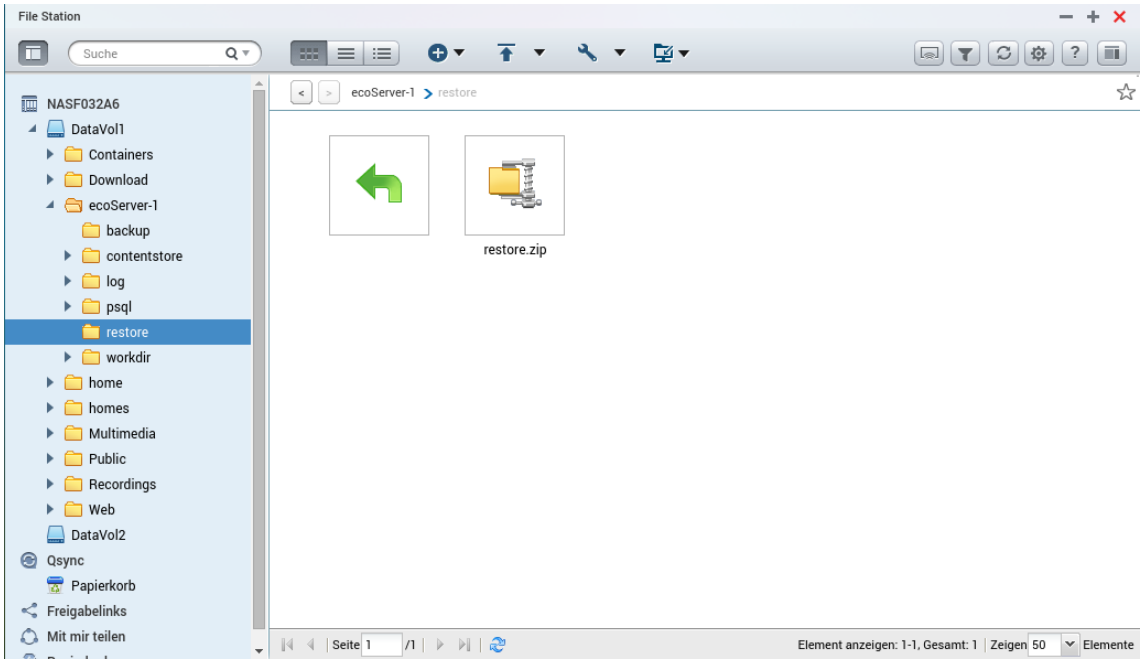


Figure 32.5: QNAP - Make Restore

33 PDF/A Printer

This ecoDMS software is not available for macOS,

The virtual PDF/A Printer from ecoDMS enables easy archiving of documents from printable applications, such as picture and graphic programmes, inventory management systems and many more as a PDF-A document. The PDF/A Printer is a printer driver dedicated to archiving documents in ecoDMS. It forms the interface to external programmes and then allows quick and prompt document archiving. Moreover, a simple click on the print function of the respective programme saves the files directly in the appropriate folder and for the right person.

33.1 Settings (Windows)

The settings for the ecoDMS PDF/A printer are only available under Windows.

You can configure various options for the PDF/A Printer. You can configure several print profiles. The most important thing is not to rename the standard printer. However, you can, of course, give the new print profiles customised names.

1. In the Windows operating system, "Devices and Printers" window.
   a) You can usually find this window in the control panel of your operating system.
   b) Example:
   ```
   Control Panel\Hardware and Sound\Devices and Printers
   ```
2. Select ecoDMS Printer. Now click "Printer Properties" in the current Windows dialog.
3. The "ecoDMS Settings" window opens.
4. Select the "Ports" tab. Click the "Configure Port" button.
   a) You must click this button because the following settings must be performed as administrator.
5. To get to the dialog with ecoDMS Printer options, select the "ECODMS" port.
6. Now click "Configure".

7. Configure the settings for the printer at your work station, which can also be saved as different printers / print profiles. You can save any number of different print profiles with different settings on your PC.

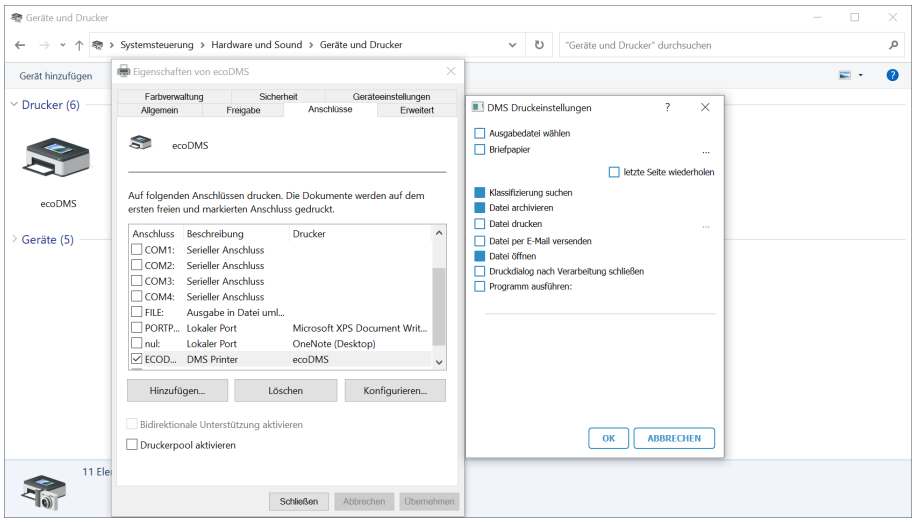


Figure 33.1: PDF/A Printer - Settings

33.1.1 Select Print File

If this feature is enabled, the memory location on the file system is requested for this file when printing with this this print profile (after the PDF/A file has been created). For example, you can save a document as PDF/A file on the file system instead of, or in addition to, the archive.

33.1.2 Letter Template

A letter template can be assigned to the PDF/A files when they are created, so that the PDF/A file appears in the same design as the printed document on physical letter paper.

1. Enable the "Letter Template" function
2. Select the letter template you want to deposit as a background for the created documents, from your file system.
    a) When printing via this print profile, the letter template is added to the PDF/A as a background image.

33.1.3 Search for Classification

If this feature is enabled, ecoDMS searches for matching classification templates when you archive a document via the PDF/A Printer.

33.1.4 Archive File

If this feature is enabled, the document can be classified and archived in ecoDMS when printing with this print profile (after the PDF/A file has been created).

33.1.5 Print File

If this feature is enabled, the document can be printed in paper form when printing with this print profile.

1. Enable the "Print file" function.
2. Select the destination printer.

33.1.6 Send File via Email

If this feature is enabled, the document can be Emailed while printing with this print profile (after creating the PDF/A file).

1. Enable the "Send file via Email" function.
2. If you select this print profile, the email window automatically opens after the PDF/A file has been created.
3. The document is added as an attachment.
4. Recipient, sender and text, etc., can be assigned freely, as usual.

33.1.7 Open File

If this feature is enabled, the finished document is opened after the PDF/A file has been created).

33.1.8 Close Print dialog after Processing

If this feature is enabled, the Print dialog is closed after the specified functions have been processed.

33.1.9 Execute Programme

If this feature is enabled, a programme starts after the specified functions have been processed. You can enter the application you want to start here.

33.2 Archive PDF/A

To archive documents via the PDF/A Printer, complete the following steps:

1. Select the function "Print" in your active programme.

   e.g. File - Print

2. Now select "ecoDMS" as printer.

3. The Classification dialog opens.

   a) You can fill in the attributes either manually or automatically as a classification template.
   b) If ecoDMS recognises templates, the programme fills in the matching attributes and highlights them in green.

4. Archive the file with "OK" or cancel the process with "Cancel".

   You can also execute this step as "dark archiving process" (automatic archiving in background).

5. The file is stored in the PDF/A format and can be accessed via the table in ecoDMS.

   If more print functions are enabled, they are processed consecutively.

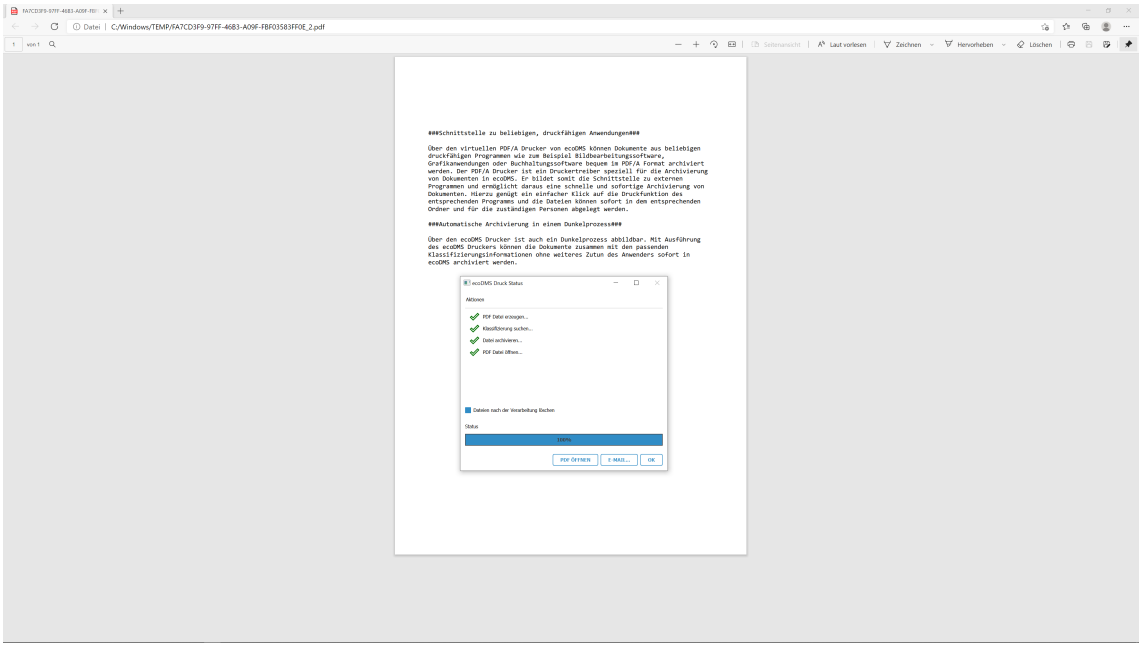


Figure 33.2: PDF/A Printer: Example of completed archiving with open file

33.3 Automatic Archiving

The contents of a classification template can be copied to the clipboard and pasted to any position. In this way you can save, for example, dummy text in documents that is recognised and set for classification in ecoDMS when archiving via the ecoDMS PDF/A printer. You can also carry out a dark process (automatic archiving in the background) via the

PDF/A Printer. In this process, users can archive the documents together with the matching classification information in ecoDMS, without performing any actions.

- When pasting the template from the clipboard, ensure that the individual lines are not damaged by line breaks.
- To hide the "dummy text" during archiving, we recommend you select a white font, for example, on a white background.

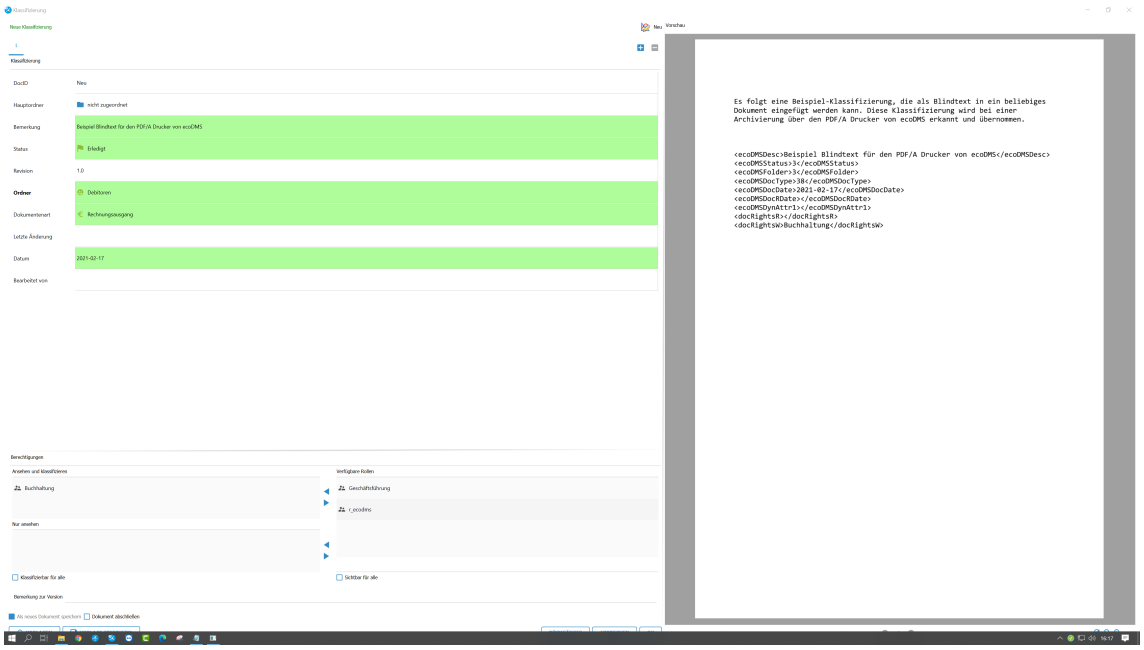


Figure 33.3: PDF/A Printer - Example with Visible "Dummy Text" and the Recognised Classification

33.3.1 Copy Classification to Clipboard

To copy a classification into the clipboard, complete the following steps:

1. Open the "Classification dialog".
2. Enter the attributes and permissions in the Classification dialog according to how they should be assigned during automatic recognition.
3. Right-click the "Permissions" window.
4. Click "Copy Classification to Clipboard".
5. Add any document to the clipboard.

a) If you add the <ecoDMSForceArchive/> command to the entry, the document is classified in a dark process when using the PDF/A Printer. This command only works with ecoDMS PDF/A Printer.

b) In this case, the Classification dialog does not open. The document is classified and deposited in ecoDMS.

Sample Code:

```
<ecoDMSDesc>This is a comment entry.</ecoDMSDesc>
<ecoDMSStatus>1</ecoDMSStatus>
<ecoDMSFolder>4.4</ecoDMSFolder>
<ecoDMSDocType>0</ecoDMSDocType>
<ecoDMSDocDate>2016-03-03</ecoDMSDocDate>
<ecoDMSDocRDate></ecoDMSDocRDate>
<ecoDMSDynAttr1>Payable</ecoDMSDynAttr1>
<ecoDMSDynAttr2>14785666</ecoDMSDynAttr2>
<ecoDMSDynAttr3>Sample Dummy Text</ecoDMSDynAttr3>
<docRightsR></docRightsR>
<docRightsW>ecoSIMSUSER</docRightsW>
```

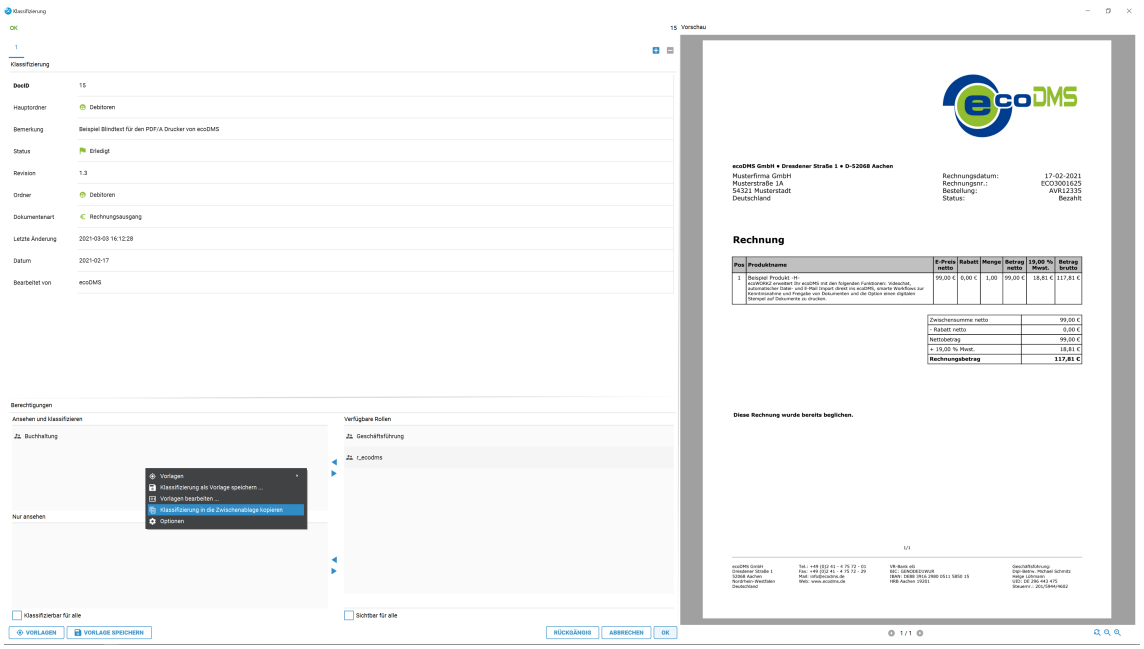


Figure 33.4: PDF/A Printer - Copy Classification to Clipboard

33.3.2 Recognise Attributes via Dummy Text

A folder can automatically be entered for the classification via the ecoDMS folder key, which is for example the customer number. Therefore, the key only has to be entered in the Dummy Text. By archiving via ecoDMS PDF/A Printer

the folder is automatically be recognised and assigned in ecoDMS. This requires that the key is stored in the ecoDMS folder structure. The automatic assignment of a folder with the help of Dummy Text is available as follows:

```
<ecoDMSFolder>SEARCH;[KEY]</ecoDMSFolder>
```

Sample Folder with Key: 123456

```
<ecoDMSFolder>SEARCH;123456</ecoDMSFolder
```

33.3.3 Archive Using Dark Process

Note that the "Open File" function in ecoDMS PDF/A Printer settings is not enabled in this case (refer to the chapter "PDF/A Printer - Settings (Windows)

When using blind text, classification and archiving can proceed automatically. To do this, ecoDMS requires a specified additional instruction. The additional instruction prompts the system to execute the classification and archiving processes in the background. In this case the Classification dialog is not displayed. The document is directly archived with the retrieved classification information when ecoDMS PDF/A Printer is executed.

1. Open the "Classification dialog".
2. Enter the attributes and permissions in the Classification dialog according to how they should be assigned during automatic recognition.
3. Right-click the "Permissions" window.
4. Click "Copy Classification to Clipboard".
5. Add any document to the clipboard.
6. Add the following command to the entry:

   ```
   <ecoDMSForceArchive/>
   ```

   a) This command only works with ecoDMS PDF/A Printer.

   b) In this case, the Classification dialog does not open. The document is classified and deposited in ecoDMS.

Sample code included command to run in the dark process:

```
<ecoDMSDesc>This is a comment entry.</ecoDMSDesc>
<ecoDMSStatus>1</ecoDMSStatus>
<ecoDMSFolder>4.4</ecoDMSFolder>
<ecoDMSDocType>0</ecoDMSDocType>
<ecoDMSDocDate>2016-03-03</ecoDMSDocDate>
<ecoDMSDocRDate></ecoDMSDocRDate>
<ecoDMSDynAttr1>Payable</ecoDMSDynAttr1>
```

```
<ecoDMSDynAttr2>14785666</ecoDMSDynAttr2>
<ecoDMSDynAttr3>Sample Dummy Text</ecoDMSDynAttr3>
<docRightsR></docRightsR>
<docRightsW>ecoSIMSUSER</docRightsW>
<ecoDMSForceArchive/>
```

33.4 Call Email Client with Dummy Text

Using dummy text, you can transfer documents to the email client and enter the addressee, the subject and the name of the attachment using parameters.
You can extend the dummy text with the following line:

```
<ecoMailSubject>Subject</ecoMailSubject>
<ecoMailTo>mail@addressee1.com</ecoMailTo>
<ecoMailCC>mail@addressee2.com</ecoMailCC>
<ecoMailBCC>mail@addressee3.com</ecoMailBCC>
<ecoMailAttachmentName>Attachment name.pdf</ecoMailAttachmentName>
```

- In ecoDMS Printer settings, both options "Search classification" and "Send file via email" must be enabled.
- When printing with ecoDMS Printer, the default email client opens. A ready-to-send email is displayed containing the values defined in the dummy text.

34 Libre- + OpenOffice Add-on

- This feature requires a license for the full version of ecoDMS but can also be tested in the trial version. This feature is not enabled in the Free4Three version.
- To use it, you need a Java installation which is enabled in the Office application (Options -> Advanced -> Java Options [enable]).
- The prerequisite for using this plugin is the installation of the current software components of: ecoDMS Server, ecoDMS Client and ecoDMS PDF/A Printer.

ecoDMS has its own add-on for LibreOffice and OpenOffice. Use the plugin to directly archive documents from the "Writer, Calc and Impress" applications in ecoDMS. When archiving, ecoDMS saves the documents in PDF/A and in the original Office format. You can edit and save the original file as a new version if required.

34.1 Archive Document

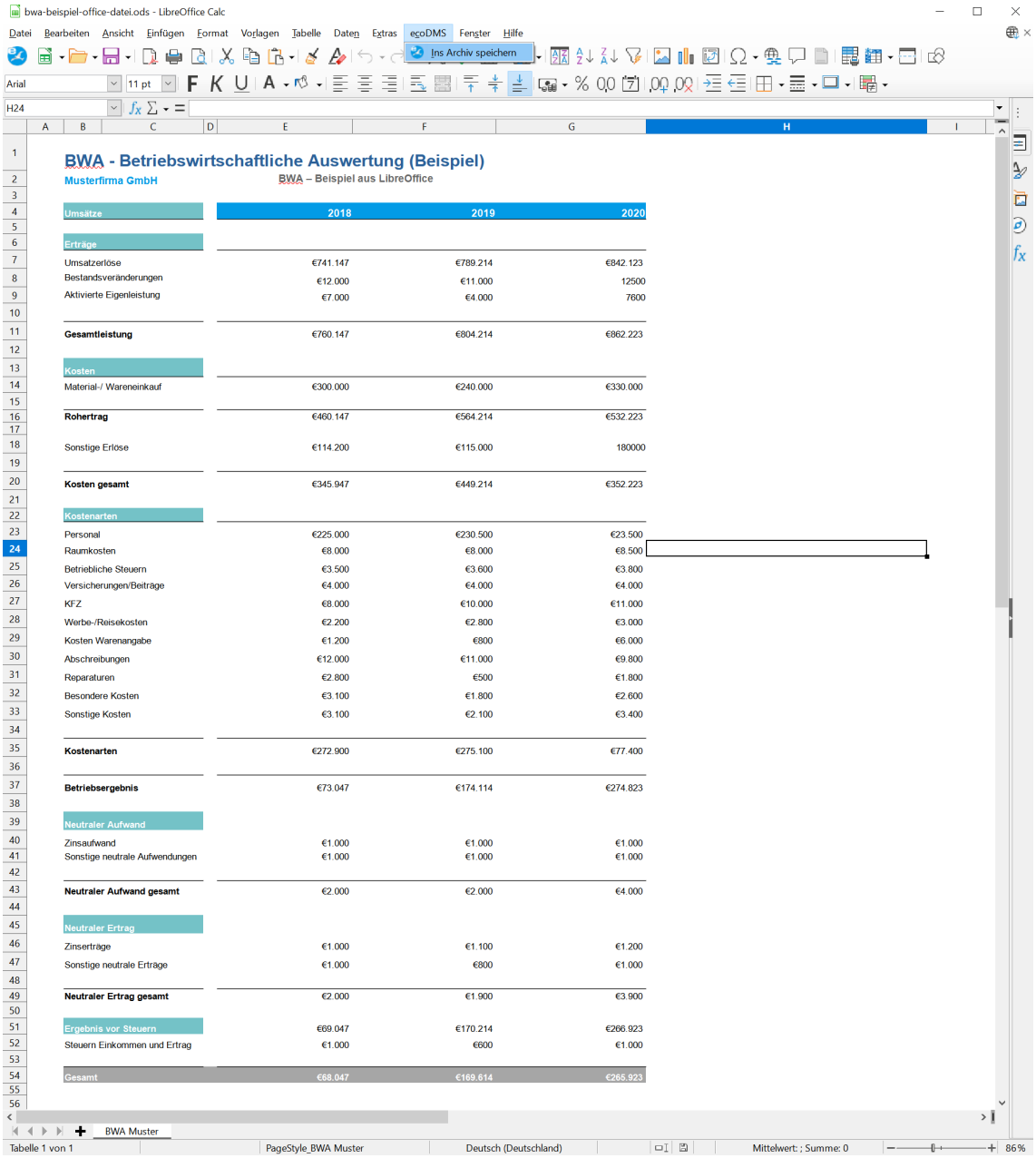
To archive documents from LibreOffice or OpenOffice in ecoDMS, proceed as follows:

1. Create an Office file
2. Select one of the following function calls for archiving
   a) Office toolbar -> ecoDMS Icon (Save to Archive)
   b) Office Menu -> ecoDMS -> Save to Archive
3. Archiving is prepared
   a) If you are connected to the Connection Manager using several profiles, ecoDMS prompts you to select the target profile for archiving
4. The classification dialog opens

- You can either fill in the attributes manually, or automatically via a classification template
- If ecoDMS recognises a template, the programme fills in the matching attributes and highlights them in Color
- Before archiving, please note the following settings:
  - If you tick the "Finalise document" checkbox, you cannot make changes to the document after archiving. If you want to make changes, the document needs to be archived in ecoDMS as a new file.
  - If the "Finalise document" checkbox is NOT ticked, the document can subsequently be opened through version control, edited, and filed as a new version.

5. Archive the files with "OK" or abort the process with "Cancel".

- The file is saved in ecoDMS in the PDF/A format and displays in the preview
- In addition, the original file is archived as a version for the PDF/A in ecoDMS



Umsätze	2018	2019	2020
Erträge			
Umsatzerlöse	€741.147	€789.214	€842.123
Bestandsveränderungen	€12.000	€11.000	12500
Aktivierte Eigenleistung	€7.000	€4.000	7600
Gesamtleistung	€760.147	€804.214	€862.223
Kosten			
Material-/ Wareneinkauf	€300.000	€240.000	€330.000
Rohertrag	€460.147	€564.214	€532.223
Sonstige Erlöse	€114.200	€115.000	180000
Kosten gesamt	€345.947	€449.214	€352.223
Kostenarten			
Personal	€225.000	€230.500	€23.500
Raumkosten	€8.000	€8.000	€8.500
Betriebliche Steuern	€3.500	€3.600	€3.800
Versicherungen/Beiträge	€4.000	€4.000	€4.000
KFZ	€8.000	€10.000	€11.000
Werbe-/Reisekosten	€2.200	€2.800	€3.000
Kosten Warenangabe	€1.200	€800	€6.000
Abschreibungen	€12.000	€11.000	€9.800
Reparaturen	€2.800	€500	€1.800
Besondere Kosten	€3.100	€1.800	€2.600
Sonstige Kosten	€3.100	€2.100	€3.400
Kostenarten	€272.900	€275.100	€77.400
Betriebsergebnis	€73.047	€174.114	€274.823
Neutraler Aufwand			
Zinsaufwand	€1.000	€1.000	€1.000
Sonstige neutrale Aufwendungen	€1.000	€1.000	€1.000
Neutraler Aufwand gesamt	€2.000	€2.000	€4.000
Neutraler Ertrag			
Zinserträge	€1.000	€1.100	€1.200
Sonstige neutrale Erträge	€1.000	€800	€1.000
Neutraler Ertrag gesamt	€2.000	€1.900	€3.900
Ergebnis vor Steuern	€69.047	€170.214	€266.923
Steuern Einkommen und Ertrag	€1.000	€600	€1.000
Gesamt	€68.047	€169.614	€265.923

Figure 34.1: LibreOffice (Here: Calc) - Save Document to Archive (Options)

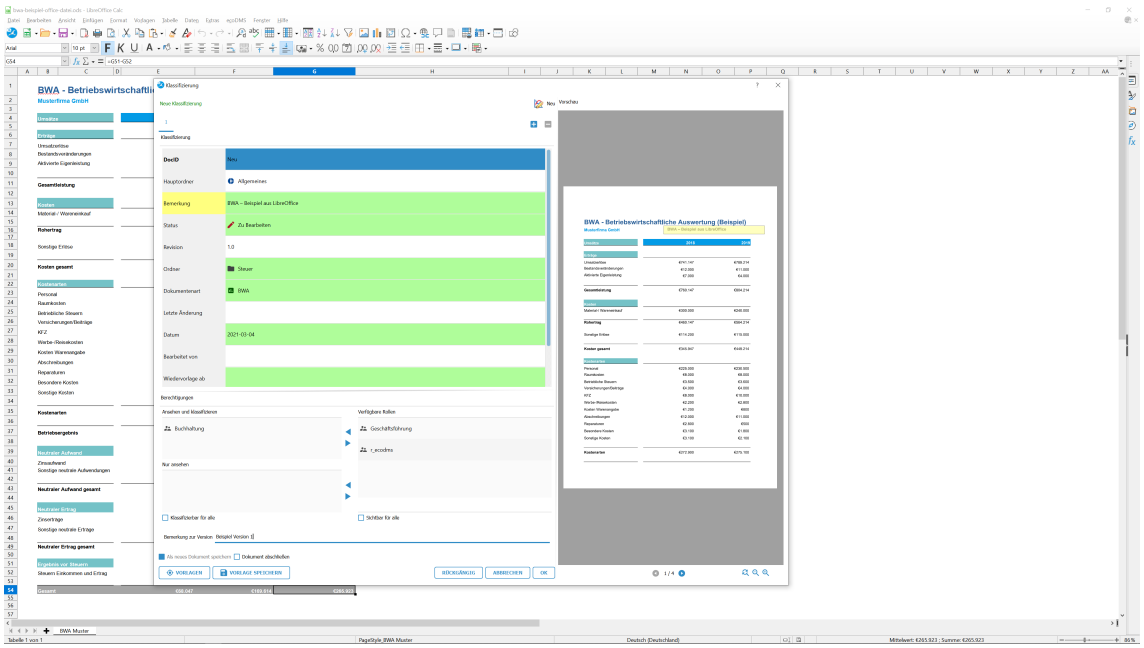


Figure 34.2: LibreOffice (Here: Calc) - Save Document to Archive (Options)

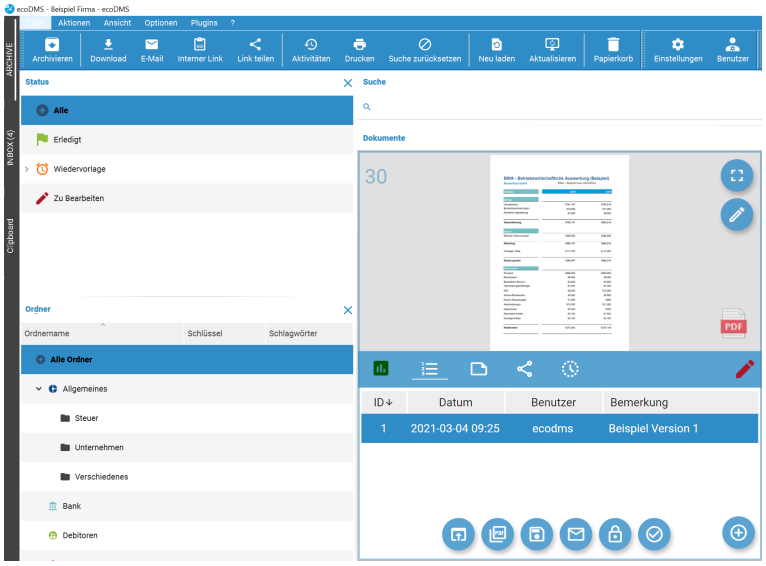


Figure 34.3: LibreOffice - Filing in ecoDMS as PDF/A (Preview) and 1st Version (Original File)

34.2 Edit Document

You can only save a new version if the document is

- not yet finalised in ecoDMS
- not checked out by another user

If an Office document is not yet finalised in ecoDMS, you can open the original file from ecoDMS, edit it with Office and then archived the file as a new version with the ecoDMS plugin.

1. Open an original file from the "Versions" tab in ecoDMS
2. Make your changes in Office
3. Select one of the following function calls for archiving
   a) Office toolbar -> ecoDMS Icon (Save to Archive)
   b) Office Menu -> ecoDMS -> Save to Archive
   c) Use the standard Office save function

   - Office menu -> File -> Save (Ctrl + S)
     - The system automatically detects that the file was opened from ecoDMS and opens the appropriate classification
   - Office menu -> File -> Save As (Ctrl + Shift + S)
     - saves the file as usual in the local file system and not in ecoDMS

4. Archiving is prepared
   a) If you are connected to the Connection Manager using several profiles, ecoDMS prompts you to select the target profile for archiving
5. The existing classification is loaded

   - Before archiving, please note the following settings:
     - If you tick the "Finalise document" checkbox, you cannot make changes to the document after archiving. If you want to make changes, the document needs to be archived in ecoDMS as a new file.
     - If the "Finalise document" checkbox is NOT ticked, the document can subsequently be opened through version control, edited, and filed as a new version.

6. Archive the emails with "OK" or abort the process with "Cancel".

   - The file is saved in ecoDMS in the PDF/A format and displays in the preview
   - In addition, the original file is archived as a new version for the PDF/A in ecoDMS

34.3 Re-Archive Document

You can open the original file of an archived Office file from ecoDMS and store it again as a new document.

1. Open an original file from the "Versions" tab in ecoDMS
2. Make your changes in Office
3. Select one of the following function calls for archiving
   a) Office toolbar -> ecoDMS Icon (Save to Archive)
   b) Office Menu -> ecoDMS -> Save to Archive
4. Archiving is prepared
   a) If you are connected to the Connection Manager using several profiles, ecoDMS prompts you to select the target profile for archiving
5. The existing classification is loaded

   - You can adapt the classification for the new document accordingly

6. Enable the "Save as new document" function in the classification dialog

   - The file is then archived in ecoDMS not as a new version but as a new document
   - In this case ecoDMS applies any changes in the classification to the new document. The classification of the "original version" remains unchanged
   - If you tick the "Finalise document" checkbox, you cannot make changes to the document after archiving
   - If the "Finalise document" checkbox is NOT ticked, the document can subsequently be opened through version control, edited, and filed as a new version

7. Archive the emails with "OK" or abort the process with "Cancel"

   - The file is saved in ecoDMS in the PDF/A format and displays in the preview
   - In addition, the original file is archived as a new version for the PDF/A in ecoDMS

35 Microsoft Office Add-in

- This feature requires a license for the full version of ecoDMS but can also be tested in the trial version. This feature is not enabled in the Free4Three version.
- The prerequisite for using this plugin is the installation of the current software components of: ecoDMS Server, ecoDMS Client and ecoDMS PDF/A Printer.

ecoDMS has its own add-in for Microsoft Office. This allows you to archive documents directly from "Word, Excel, PowerPoint and Outlook in ecoDMS. When archiving, ecoDMS saves the documents in PDF/A and in the original Office format. The original file can be edited and saved as a new version if required.

35.1 Archive Document

To archive documents from MS Office in ecoDMS, proceed as follows:

1. Create an Office file
2. Select one of the following function calls for archiving
   a) Office toolbar -> ecoDMS icon (Archive) (in the Office "Start" tab)
   b) Office menu -> ecoDMS -> Archive (display depends on the MS Office version)
3. Archiving is prepared
   a) If you are connected to the Connection Manager using several profiles, ecoDMS prompts you to select the target profile for archiving
4. The classification dialog opens

- You can either fill in the attributes manually, or automatically via a classification template
- If ecoDMS recognises a template, the programme fills in the matching attributes and highlights them in Color
- Before archiving, please note the following settings:
  - If you tick the "Finalise document" checkbox, you cannot make changes to the document after archiving. If you want to make changes, the document needs to be archived in ecoDMS as a new file.
  - If the "Finalise document" checkbox is NOT ticked, the document can subsequently be opened through version control, edited, and filed as a new version.

5. Archive the emails with "OK" or abort the process with "Cancel".

- The file is saved in ecoDMS in the PDF/A format and displays in the preview
- In addition, the original file is archived as a version for the PDF/A in ecoDMS

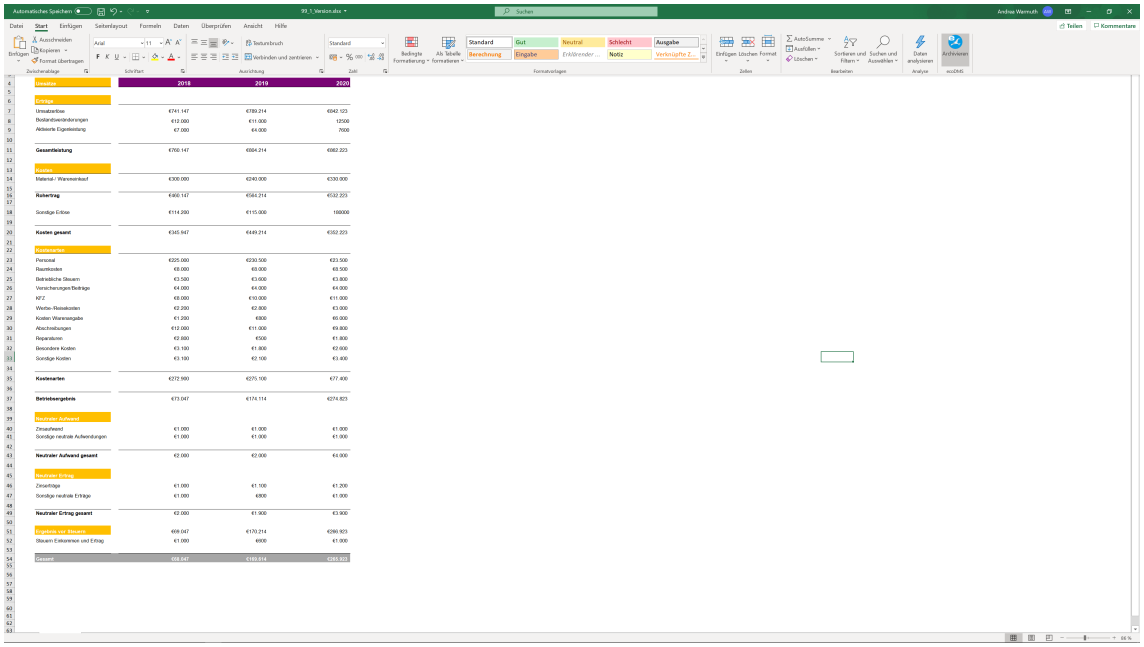


Figure 35.1: MS Office (Here: Excel) - Archive Document

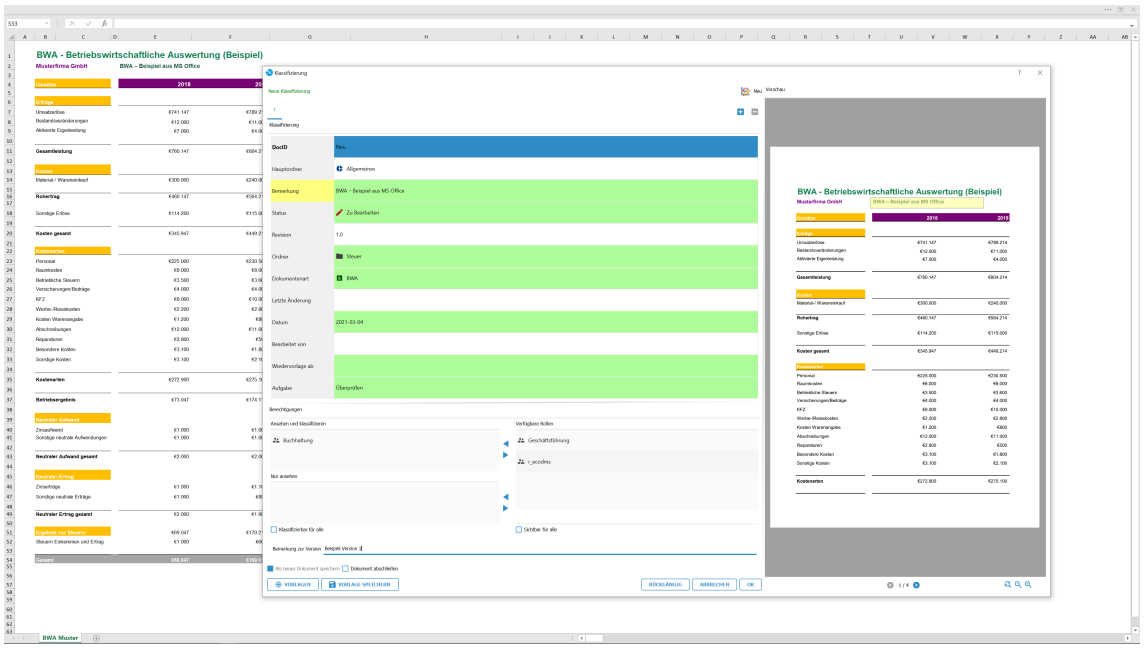


Figure 35.2: MS Office - Classification as First Version (Here: With Recognised Classification Template)

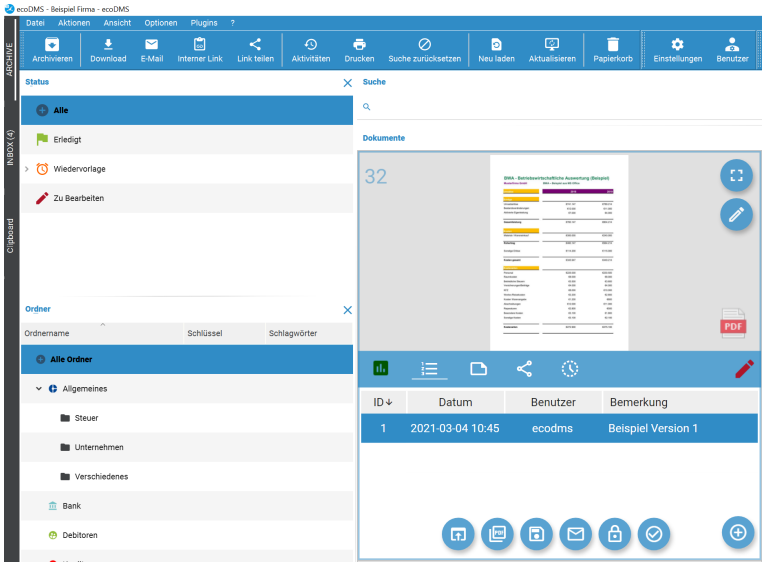


Figure 35.3: MS Office - Filing in ecoDMS as PDF/A (Preview) and 1st Version (Original File)

35.2 Edit Document

You can only save a new version if the document is

- not yet finalised in ecoDMS
- not checked out by another user

If an Office document is not yet finalised in ecoDMS, you can open the original file from ecoDMS, edit it with Office and then archived the file as a new version with the ecoDMS plugin.

1. Open an original file from the "Versions" tab in ecoDMS
2. Make your changes in Office
3. Select one of the following function calls for archiving
   a) Office toolbar -> ecoDMS Icon (Archive)
   b) Office menu -> ecoDMS -> Archive (display depends on the MS Office version)
   c) Use the standard Office save function

   - Office menu -> File -> Save
     - The system automatically detects that the file was opened from ecoDMS and opens the appropriate classification
   - Office menu -> File -> Save As
     - saves the file as usual in the local file system and not in ecoDMS

4. Archiving is prepared
   a) If you are connected to the Connection Manager using several profiles, ecoDMS prompts you to select the target profile for archiving
5. The existing classification is loaded

   - Before archiving, please note the following settings:
     - If you tick the "Finalise document" checkbox, you cannot make changes to the document after archiving. If you want to make changes, the document needs to be archived in ecoDMS as a new file.
     - If the "Finalise document" checkbox is NOT ticked, the document can subsequently be opened through version control, edited, and filed as a new version.

6. Archive the emails with "OK" or abort the process with "Cancel".

   - The file is saved in ecoDMS in the PDF/A format and displays in the preview
   - In addition, the original file is archived as a new version for the PDF/A in ecoDMS

35.3 Re-Archive Document

You can open the original file of an archived Office file from ecoDMS and store it again as a new document.

1. Open an original file from the "Versions" tab in ecoDMS
2. Make your changes in Office
3. Select one of the following function calls for archiving
   a) Office toolbar -> ecoDMS Icon (Archive)
   b) Office menu -> ecoDMS -> Archive (display depends on the MS Office version)
4. Archiving is prepared
   a) If you are connected to the Connection Manager using several profiles, ecoDMS prompts you to select the target profile for archiving
5. The existing classification is loaded

   - You can adapt the classification for the new document accordingly

6. Enable the "Save as new document" function in the classification dialog

   - The file is then archived in ecoDMS not as a new version but as a new document
   - In this case ecoDMS applies any changes in the classification to the new document. The classification of the "original version" remains unchanged
   - If you tick the "Finalise document" checkbox, you cannot make changes to the document after archiving
   - If the "Finalise document" checkbox is NOT ticked, the document can subsequently be opened through version control, edited, and filed as a new version

7. Archive the emails with "OK" or abort the process with "Cancel".

   - The file is saved in ecoDMS in the PDF/A format and displays in the preview
   - In addition, the original file is archived as a new version for the PDF/A in ecoDMS

35.4 Archive Emails from Outlook

In addition to Office documents, you can also archive incoming and outgoing emails from Outlook via the MS Office plugin of ecoDMS.

1. ecoDMS archives the complete email, including any attachments, in the standard mail format EML.
    a) This file is archived as a version
2. The message content (without attachments) is filed as PDF/A
    - The PDF/A is displayed in the preview
3. If the email contains attachments, they are stored individually in ecoDMS as an attachment to the DocID in the table view
    a) Attachments are identified with a Colored arrow next to the DocID in the table
4. During the archiving process, ecoDMS executes automatic full-text recognition
    a) This allows the retrieval of email text and readable attachments via the full-text search

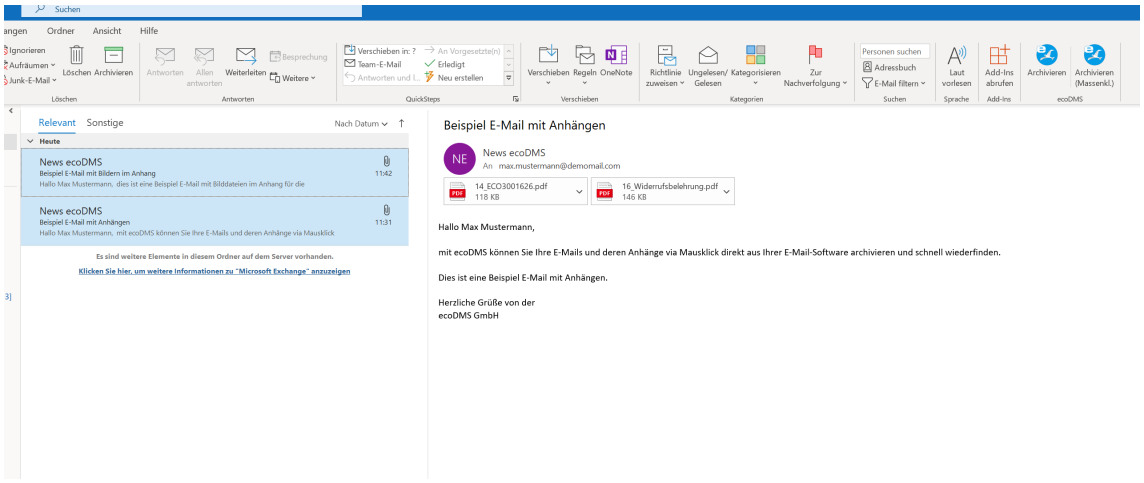


Figure 35.4: MS Office Plugin - Outlook

35.4.1 Send and Archive

You can send outgoing emails and archive them at the same time.

1. Write a message as usual and add attachments as an option
2. Click the "Send and Archive" icon in the Outlook "Message" tab
3. The email is sent and prepared for archiving
    a) If you are connected to the Connection Manager using several profiles, ecoDMS prompts you to select the target profile for archiving
4. The classification dialog opens

- You can either fill in the attributes manually, or automatically via a classification template
- If ecoDMS recognises a template, the programme fills in the matching attributes and highlights them in Color
- Before archiving, please note the following settings:
  - If you tick the "Finalise document" checkbox, no further versions can be added to the email
  - If you do NOT tick the "Finalise document" checkbox, you can add further versions the email in ecoDMS

5. Archive the email with "OK" or abort the process with "Cancel"

- The message content is saved in ecoDMS in the PDF/A format and displays in the preview
- In addition, an EML file of the email is archived as an initial version for the PDF/A in ecoDMS
- If the email contains attachments, they are stored individually in ecoDMS as an attachment to the DocID in the table view

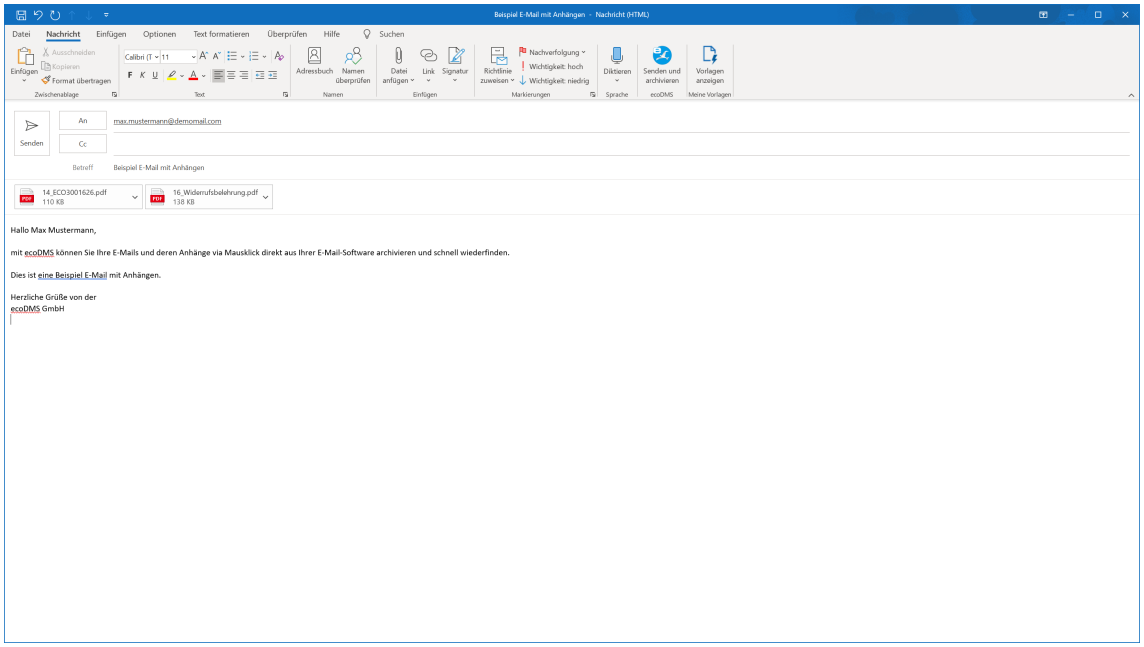


Figure 35.5: MS Office Plugin - Outlook - Send and Archive Email (Here: With Attachment)

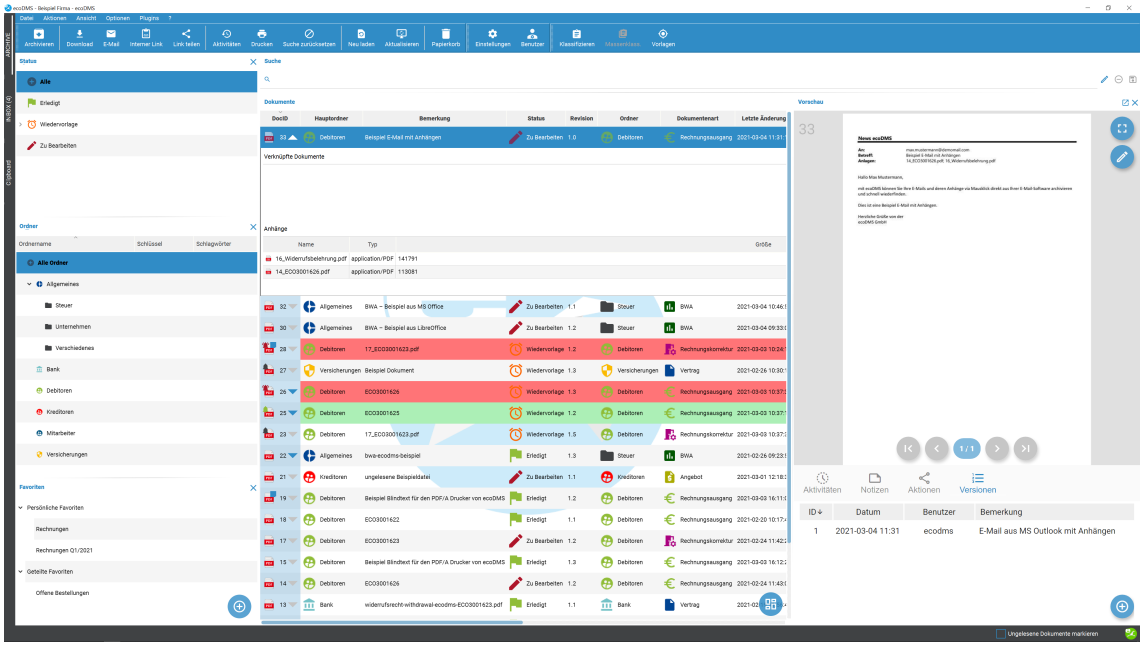


Figure 35.6: MS Office Plugin - Outlook - Archived Email with Attachments in ecoDMS (Here: Table View)

35.4.2 Archive Single Email

To archive an entire email (incl. attachments), complete the following steps:

1. Select or open the email in Outlook
2. Click the ecoDMS "Archive" icon
3. Archiving is prepared
   a) If you are connected to the Connection Manager using several profiles, ecoDMS prompts you to select the target profile for archiving
4. The classification dialog opens

- You can either fill in the attributes manually, or automatically via a classification template
- If ecoDMS recognises a template, the programme fills in the matching attributes and highlights them in Color
- Before archiving, please note the following settings:
  - If you tick the "Finalise document" checkbox, no further versions can be added to the email
  - If you do NOT tick the "Finalise document" checkbox, you can add further versions the email in ecoDMS

5. Archive the email with "OK" or abort the process with "Cancel"

- The message content is saved in ecoDMS in the PDF/A format and displays in the preview
- In addition, an EML file of the email is archived as an initial version for the PDF/A in ecoDMS
- If the email contains attachments, they are stored individually in ecoDMS as an attachment to the DocID in the table view

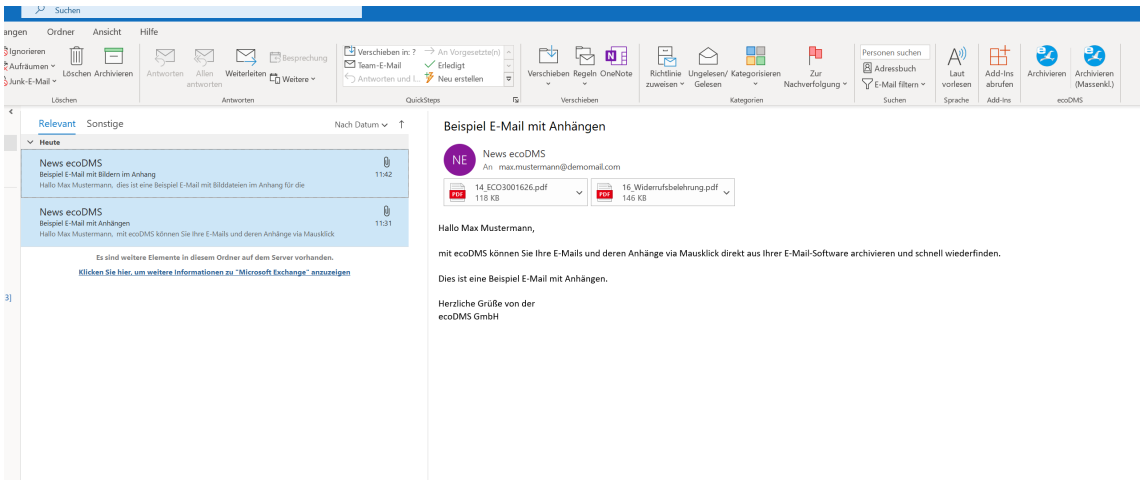


Figure 35.7: MS Office Plugin - Outlook - Archive Email

35.4.3 Archive Several Emails Consecutively

You can archive several emails consecutively. The emails are classified individually, one after the other. To archive several emails consecutively, complete the following steps

1. Highlight the emails in Outlook (hold down the CTRL key for multiple selection)
2. Click the ecoDMS "Archive" icon
3. Archiving is prepared
   a) If you are connected to the Connection Manager using several profiles, ecoDMS prompts you to select the target profile for archiving
4. The classification dialog is opened for each email, i.e. one after the other

- You can either fill in the attributes manually, or automatically via a classification template
- If ecoDMS recognises a template, the programme fills in the matching attributes and highlights them in Color
- Before archiving, please note the following settings:
  - If you tick the "Finalise document" checkbox, no further versions can be added to the email
  - If you do NOT tick the "Finalise document" checkbox, you can add further versions the email in ecoDMS

5. Archive the emails with "OK" or abort the process with "Cancel"

- The message content is saved in ecoDMS in the PDF/A format and displays in the preview
- In addition, an EML file of the email is archived as an initial version for the PDF/A in ecoDMS
- If the email contains attachments, they are stored individually in ecoDMS as an attachment to the DocID in the table view

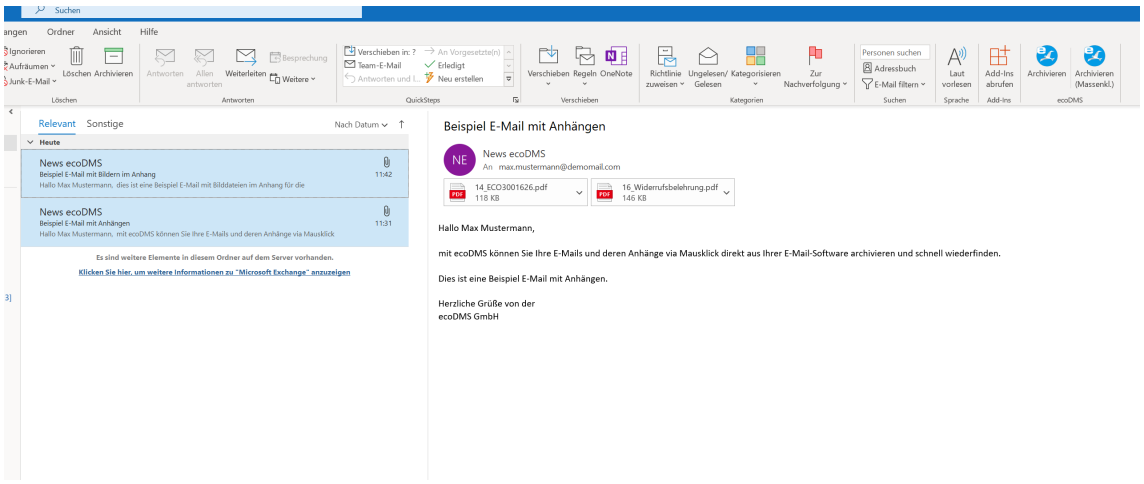


Figure 35.8: MS Office Plugin - Outlook - Archive Email

35.4.4 Archive Several Emails Simultaneously (Mass Classification)

You can archive several emails simultaneously. In this case, ecoDMS performs mass classification for all selected messages and all files receive the same classification. The emails are saved in ecoDMS complete with attachments. To archive several emails with mass classification, complete the following steps:

1. Highlight the emails in Outlook (hold down the CTRL key for multiple selection)
2. Click the ecoDMS "Archive (Mass Classification)" icon
3. Archiving is prepared

a) If you are connected to the Connection Manager using several profiles, ecoDMS prompts you to select the target profile for archiving

4. Classification is now performed as mass classification

a) A mass classification classifies several emails simultaneously with the same information.
b) For mass classification, only fill in the fields that you want to classify for all documents. All other classification attributes are not overwritten.

5. Archive the emails with "OK" or abort the process with "Cancel"

- Each email is saved individually in ecoDMS
- The message content is saved in ecoDMS in the PDF/A format and displays in the preview
- In addition, an EML file of the email is archived as an initial version for the PDF/A in ecoDMS
- If the email contains attachments, they are stored individually in ecoDMS as an attachment to the DocID in the table view

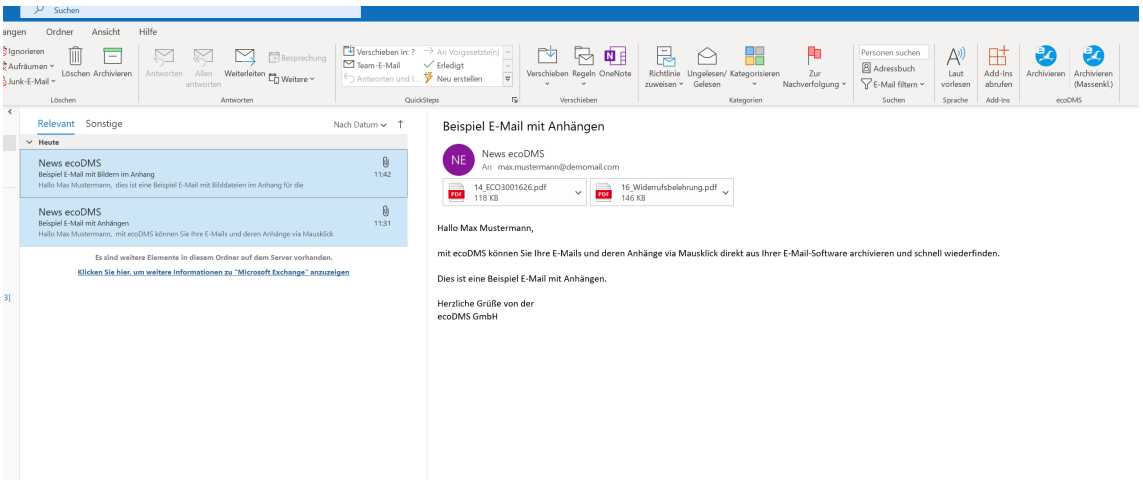


Figure 35.9: MS Office Plugin - Outlook - Archive Email

35.4.5 Archive Attachments

You can archive email attachments in ecoDMS independently, without the message. Classification can be performed individually for each attachment or uniformly as mass classification for all attachments. If the attachments are readable files, ecoDMS automatically creates a full-text index.

1. Open the email in Outlook
2. Click the ecoDMS "Archive Attachment" icon

3. If there are several attachments, you can now select which files you want to archive

   - In this selection dialog, enable the "Mass Classification" function for uniform classification of all selected files
   - For mass classification, only fill in the fields that you want to classify for all documents. All other classification attributes are not overwritten
   - Otherwise, all selected attachments are classified consecutively

4. Archiving is prepared
   a) If you are connected to the Connection Manager using several profiles, ecoDMS prompts you to select the target profile for archiving
5. The classification dialog opens according to your selection
   a) Either for each document individually, i.e. consecutively
   b) Or in form of a dialog for mass classification of all files
6. Archive the attachments with "OK" or abort the process with "Cancel"

   - Each file is saved individually in ecoDMS
   - The attachment is archived in its original format

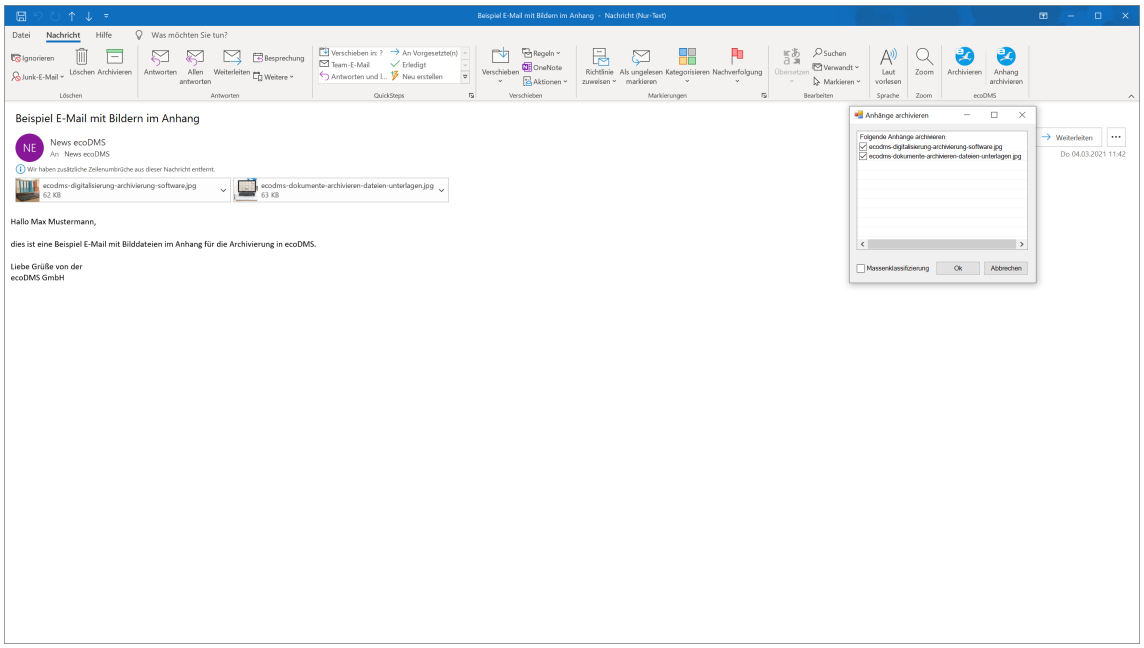


Figure 35.10: MS Office Plugin - Outlook - Archive Email Attachments

36 Thunderbird Add-on

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

1. ecoDMS archives the complete email, including any attachments, in the standard mail format EML.
    a) This file is archived as a version
2. The message content (without attachments) is filed as PDF/A
    – The PDF/A is displayed in the preview
3. If the email contains attachments, they are stored individually in ecoDMS as an attachment to the DocID in the table view
    a) Attachments are identified with an arrow next to the DocID
4. During the archiving process, ecoDMS executes automatic full-text recognition
    a) This allows the retrieval of email text and readable attachments via the full-text search
5. The ecoDMS Thunderbird add-on does not generate PDF/A files for macOS. Only the original email is deposited as an EML file. This is not an error in ecoDMS: https://bugzilla.mozilla.org/show_bug.cgi?id=675709
6. The prerequisite for using this add-on is the installation of the current software components of: ecoDMS Server, ecoDMS Client and ecoDMS PDF/A Printer

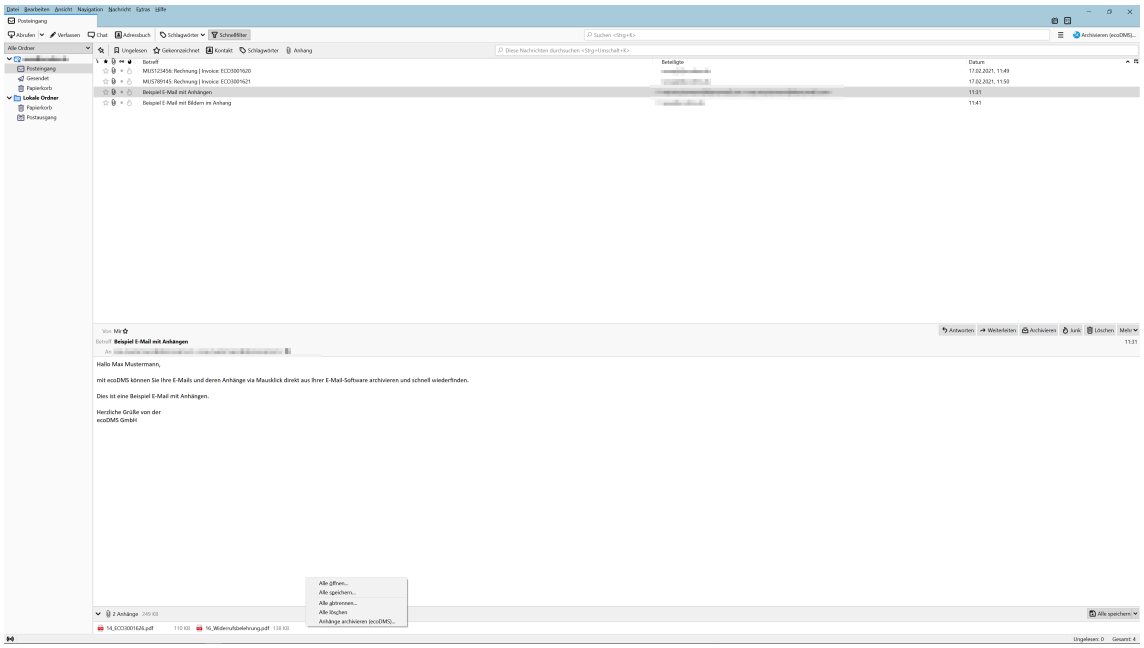


Figure 36.1: Thunderbird Plugin

36.1 Send and Archive

You can send outgoing emails and archive them at the same time.

1. Write a message as usual and add attachments as an option
2. Click the "Send and Archive" icon in Thunderbird
3. The email is sent and prepared for archiving
   a) If you are connected to the Connection Manager using several profiles, ecoDMS prompts you to select the target profile for archiving
4. The classification dialog opens

   - You can either fill in the attributes manually, or automatically via a classification template
   - If ecoDMS recognises a template, the programme fills in the matching attributes and highlights them in Color
   - Before archiving, please note the following settings:
     - If you tick the "Finalise document" checkbox, no further versions can be added to the email
     - If you do NOT tick the "Finalise document" checkbox, you can add further versions the email in ecoDMS

5. Archive the email with "OK" or abort the process with "Cancel"

- The message content is saved in ecoDMS in the PDF/A format and displays in the preview
- In addition, an EML file of the email is archived as an initial version for the PDF/A in ecoDMS
- If the email contains attachments, they are stored individually in ecoDMS as an attachment to the DocID in the table view

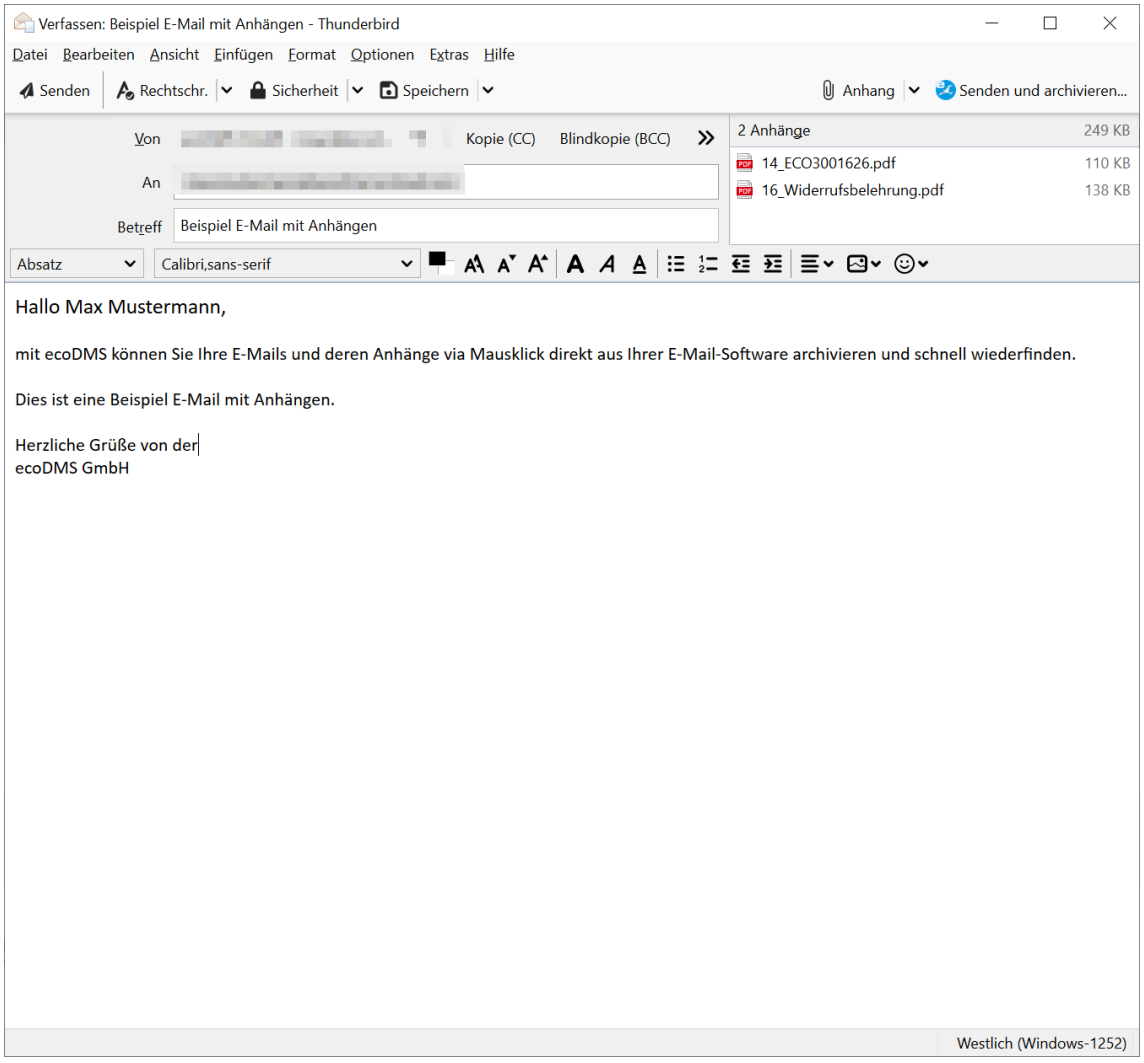


Figure 36.2: Thunderbird Plugin - Send and Archive Email

36.2 Archive Single Email

To archive an entire email (incl. attachments), complete the following steps:

1. Select or open the email in Thunderbird
2. Click the ecoDMS icon "Archive (ecoDMS)"

3. Archiving is prepared
    a) If you are connected to the Connection Manager using several profiles, ecoDMS prompts you to select the target profile for archiving
4. The classification dialog opens

- You can either fill in the attributes manually, or automatically via a classification template
- If ecoDMS recognises a template, the programme fills in the matching attributes and highlights them in Color
- Before archiving, please note the following settings:
    - If you tick the "Finalise document" checkbox, no further versions can be added to the email
    - If you do NOT tick the "Finalise document" checkbox, you can add further versions the email in ecoDMS

5. Archive the email with "OK" or abort the process with "Cancel"

- The message content is saved in ecoDMS in the PDF/A format and displays in the preview
- In addition, an EML file of the email is archived as an initial version for the PDF/A in ecoDMS
- If the email contains attachments, they are stored individually in ecoDMS as an attachment to the DocID in the table view

36.3 Archive Several Emails Consecutively

You can archive several emails consecutively. The emails are classified individually, one after the other. To archive several emails consecutively, complete the following steps:

1. Highlight the emails in Thunderbird (hold down the CTRL key for multiple selection)
2. Click the ecoDMS icon "Archive (ecoDMS)"
3. Archiving is prepared
    a) If you are connected to the Connection Manager using several profiles, ecoDMS prompts you to select the target profile for archiving
4. The classification dialog is opened for each email, i.e. one after the other

- You can either fill in the attributes manually, or automatically via a classification template
- If ecoDMS recognises a template, the programme fills in the matching attributes and highlights them in Color
- Before archiving, please note the following settings:
  - If you tick the "Finalise document" checkbox, no further versions can be added to the email
  - If you do NOT tick the "Finalise document" checkbox, you can add further versions the email in ecoDMS

5. Archive the emails with "OK" or abort the process with "Cancel".

- The message content is saved in ecoDMS in the PDF/A format and displays in the preview
- In addition, an EML file of the email is archived as an initial version for the PDF/A in ecoDMS
- If the email contains attachments, they are stored individually in ecoDMS as an attachment to the DocID in the table view

36.4 Archive Attachments

You can archive email attachments in ecoDMS independently, without the message. If there are several attachments, you can archive them all at once in ecoDMS. Each attachment is classified individually. If the attachments are readable files, ecoDMS automatically creates a full-text index.

1. Open the email in Thunderbird
2. Expand the "Attachments" window
3. If there are several attachments, you can now select which files you want to archive

- Right-click the heading "x Attachments" -> Archive Attachments (ecoDMS) to classify and archive all attachments subsequently
- Right-click a single attachment -> Archive Attachment (ecoDMS) to classify and archive only this attachment

4. Archiving is prepared
   a) If you are connected to the Connection Manager using several profiles, ecoDMS prompts you to select the target profile for archiving
5. The classification dialog opens subsequently for each attachment
6. Archive the attachments with "OK" or abort the process with "Cancel"

- Each file is saved individually in ecoDMS
- The attachment is archived in its original format

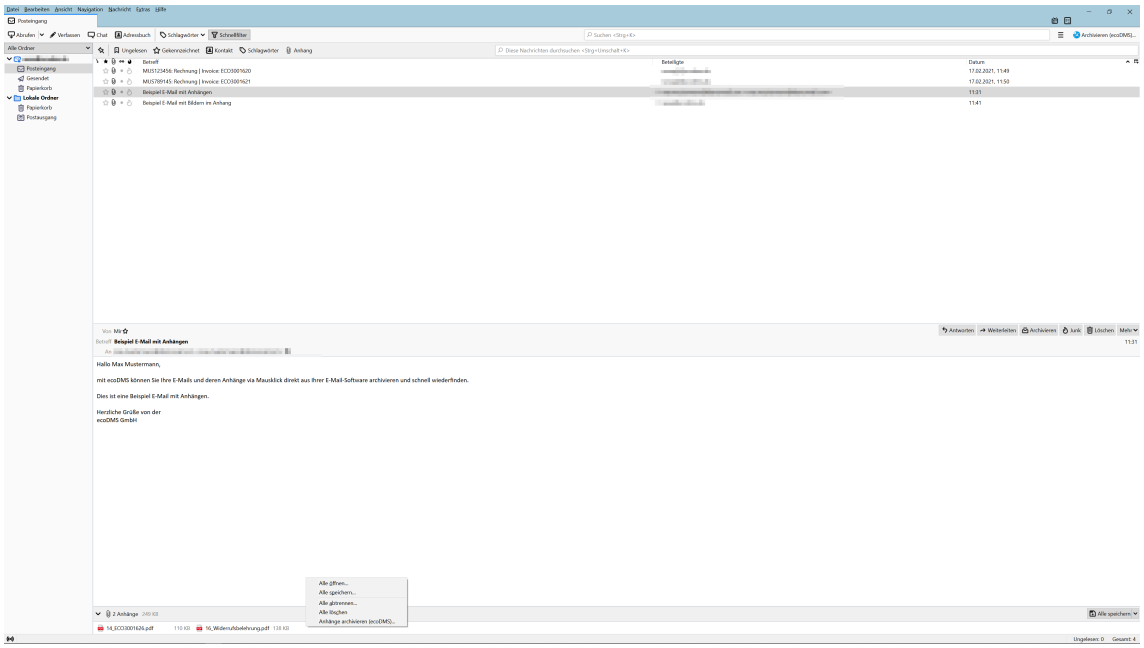


Figure 36.3: Thunderbird Plugin - Archive Attachments

37 ecoMAILZ Plugin

- ecoMAILZ is a stand-alone software that is not included in the standard ecoDMS package. You need to purchase a license for this software. If you have a valid ecoMAILZ license, you can install the ecoMAILZ plugin for the ecoDMS full version for free.
- The ecoDMS installation manual describes how to set up the connection. General settings, such as the configuration of adapters, users, etc., can only be made by an administrator via ecoMAILZ Webclient.
- All ecoMAILZ email features with the exception of the Read Aloud feature are also available in the plugin.
- The user and read permissions of the ecoMAILZ settings in the Webclient apply.
- This chapter focuses on the ecoMAILZ features specific to ecoDMS.
- For all other ecoMAILZ features, refer to the ecoMAILZ manual.

ecoMAILZ integration in ecoDMS: ecoMAILZ is a stand-alone software for automatic and legally compliant archiving of emails and their attachments. Integrating ecoMAILZ into the ecoDMS document management system enables you to manage all your documents and emails from one user interface. You do not need to switch between systems to access your data. The plugin integrates the ecoMAILZ interface with the ecoDMS interface in a separate tab. This allows you to manage all your emails and their attachments from the ecoDMS user interface.

37.1 Search & Filters

The ecoMAILZ plugin for ecoDMS provides the common search features from the Webclient. You can also carry out a cross-archive full-text search between ecoDMS and ecoMAILZ.

- The search and filter features on the ecoMAILZ tab in ecoDMS are the same as in the ecoMAILZ Webclient.
- This chapter focuses on the ecoMAILZ features specific to ecoDMS.
- For all other ecoMAILZ features, refer to the ecoMAILZ manual.

Tip:

- You can also use the full-text search in the ecoDMS client to search for emails in ecoMAILZ.
- To do so, enter the search terms in the ecoDMS search box.
- ecoDMS immediately displays the results in the "Archives" tab.
- The "ecoMAILZ" tab also displays the matching emails.
- The search term you enter is automatically used to search in ecoMAILZ.

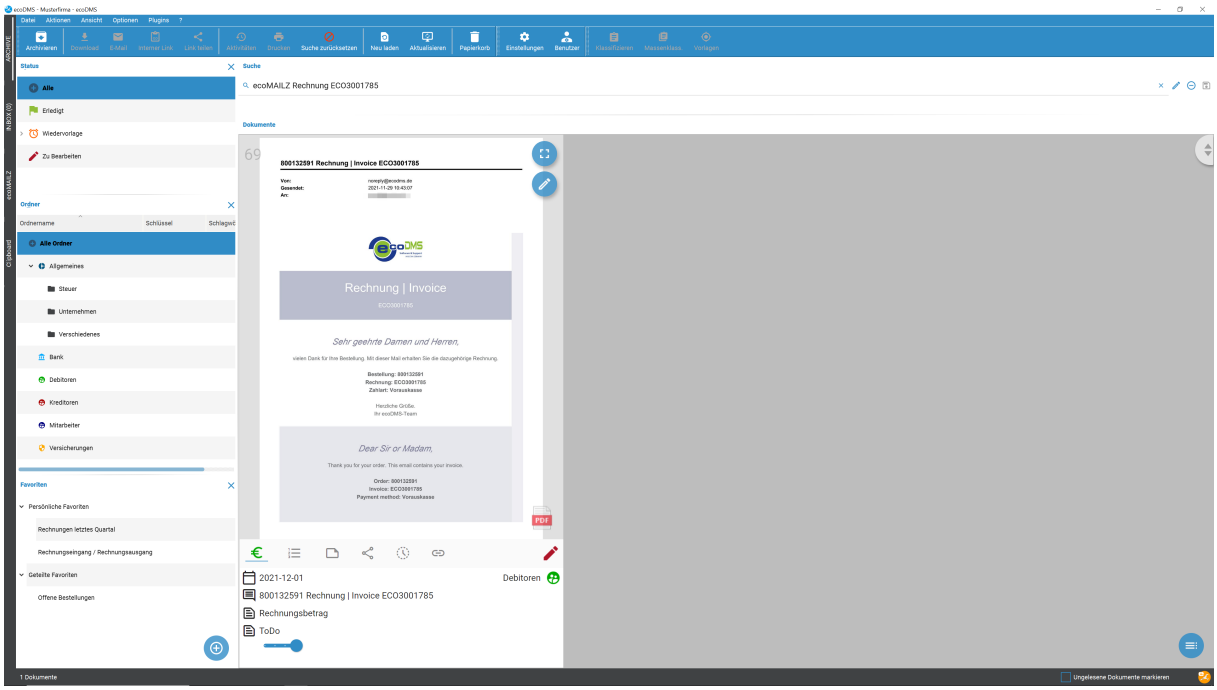


Figure 37.1: ecoMAILZ Plugin in ecoDMS (burns) - Cross-Archive Full-Text Search (Here: Output in the "Archive" Tab of ecoDMS)

37.2 Copy to ecoDMS

- The "Copy to ecoDMS" feature enables users to archive emails (EML files) with attachments in ecoDMS. ecoDMS stores the email including any attachments in the standard EML email format.
- In addition, the message and its attachments are stored in a bundled PDF/A-3 file.
  - **PDF/A-3-format:** You can embed any file type in PDF/A-3. For example, you can add email attachments such as PDF or Office files to a PDF/A-3 document. Thus, if you open a PDF/A-3 file, it contains the plain email text in PDF format and the attachments.
  - In ecoDMS, you can open the PDF/A-3 file in either the card or the table view.
  - In addition, the PDF/A-3 file is displayed in the preview window of ecoDMS.
- If the email contains attachments, they are stored individually in ecoDMS as an attachment to the DocID in the table view
- During the archiving process, ecoDMS executes automatic full-text recognition. This allows the retrieval of email texts and readable attachments via the full-text search.

You can copy your emails - individually, if required - to the document management system via the plugin. To copy the entire email to ecoDMS and archive it, complete the following steps:

1. Select the email in the ecoMAILZ tab of ecoDMS.
2. Click the menu icon in the message.
3. Select the "Copy to ecoDMS" function.
4. The email is prepared for archiving and the classification dialog of ecoDMS opens.
5. Enter the classification information to archive the email in ecoDMS.

   a) ecoDMS displays the PDF of your message in the preview window of the classification dialog box.
   b) For more information on classification and the general operation of the document management system, refer to the ecoDMS manual.

6. In the classification dialog, confirm the classification and the associated archiving process in ecoDMS with "OK".

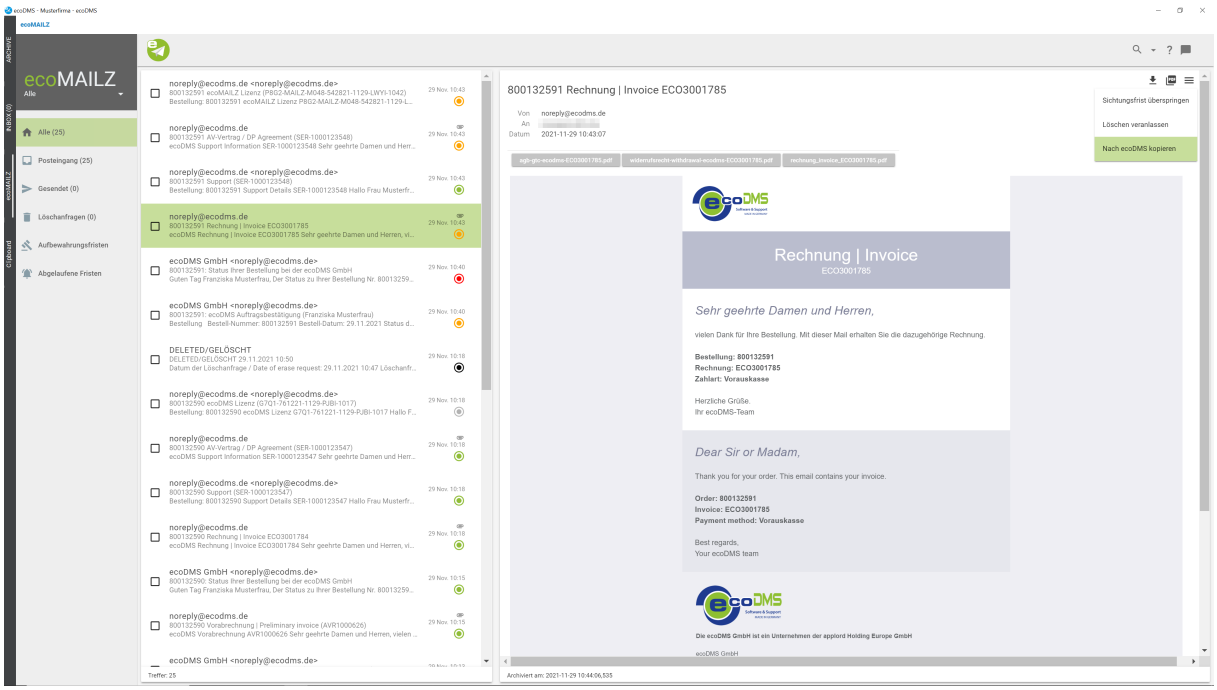


Figure 37.2: ecoMAILZ Plugin in ecoDMS (burns) - Copy to ecoDMS

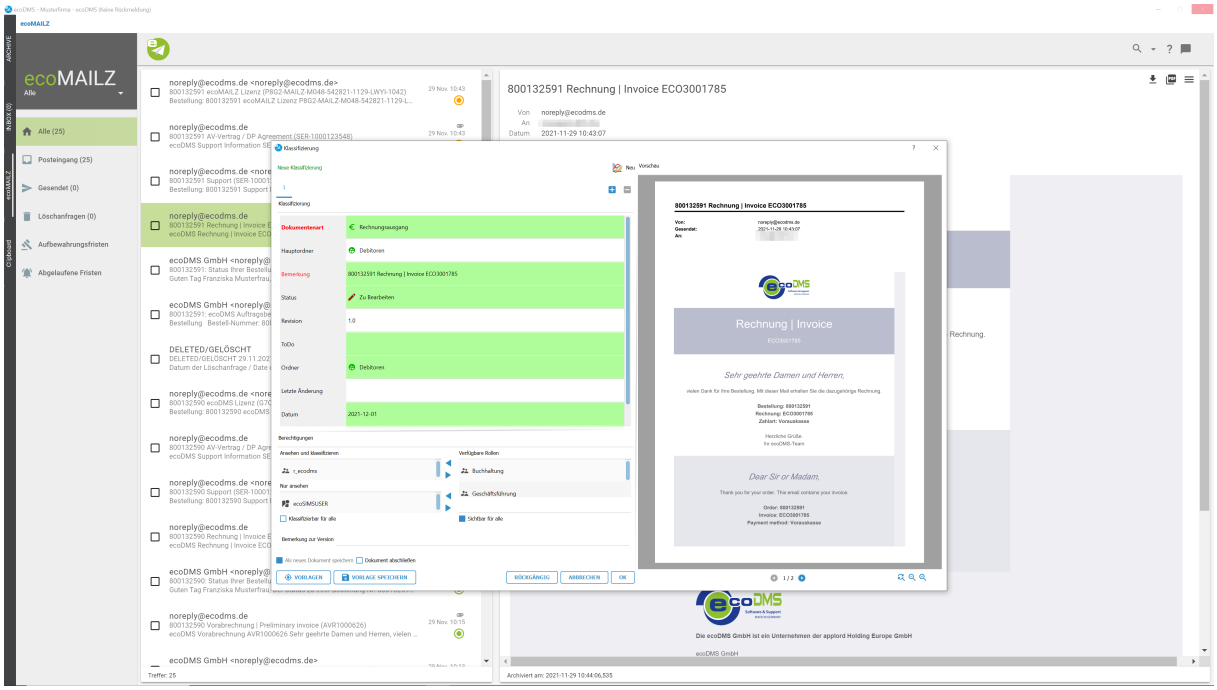


Figure 37.3: ecoMAILZ Plugin in ecoDMS (burns) - Copy to ecoDMS - Classification

37.3 Download

- You download the emails in the original format, including any attachments.
- The email is saved in the default target folder for downloads.

To download emails with the download feature, complete the following steps:

1. Select the email in the ecoMAILZ tab in ecoDMS.
2. Click the "Download" icon in the message (arrow points down).
   a) The icon is located at the top right of the main window of the email.
3. The email is downloaded.
4. ecoDMS displays a dialog with further download options:
   a) **Open:** Click the "Open" button to open the original email file.

      - If the email is already in the download folder, this button is greyed out.
      - As a rule, the default email client on the respective workstation is used to open the email.

   b) **Copy to ecoDMS:** Click the "Copy to ecoDMS" button to archive the original email file in ecoDMS. The classification dialog box opens. Enter the classification information to archive the email in ecoDMS.

      - ecoDMS does not display a preview in the preview window of the classification dialog box (because it is not a PDF file).
      - This process only archives the EML file including any attachments (no PDF).
      - A preview and a PDF/A-3 file are only created with the direct function call "Copy to ecoDMS" in the email menu of the message.
      - For more information on classification and the general operation of the document management system, refer to the ecoDMS manual.

   c) **Display Download Folder:** Click the "Display Download Folder" button to open the folder in the file system.
   d) **Cancel:** If you do not want to execute any of the above mentioned options, click "Cancel".

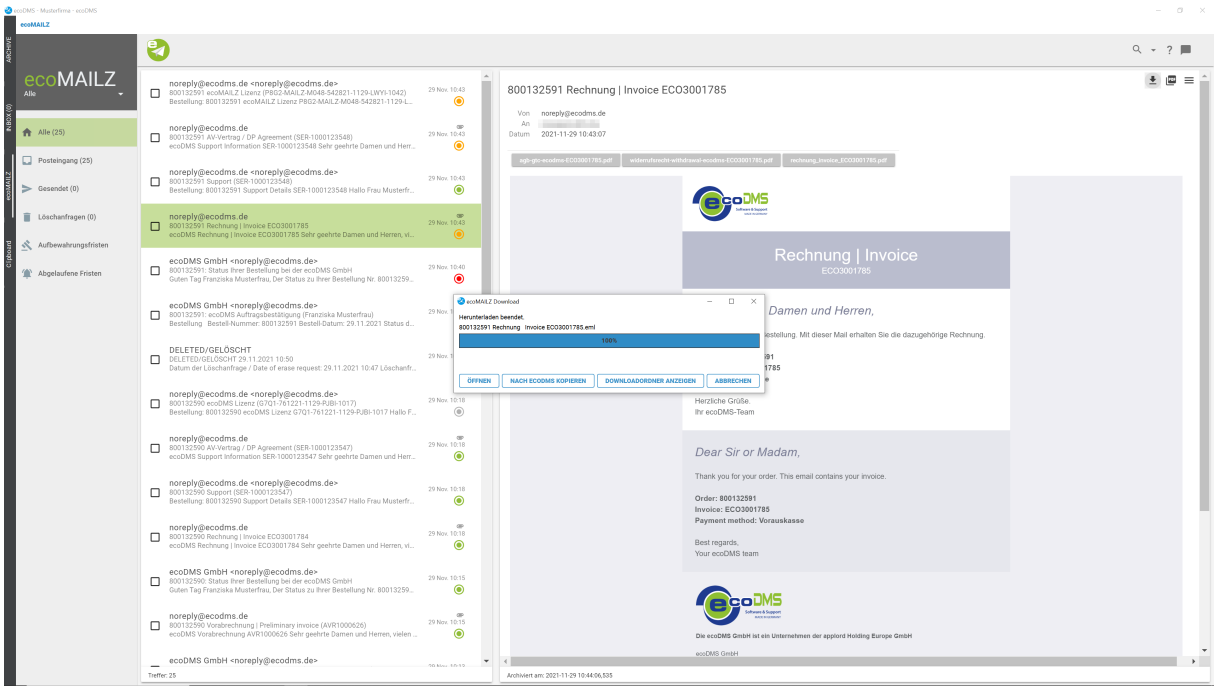


Figure 37.4: ecoMAILZ Plugin in ecoDMS Version 18.09 - Download (Here: Complete Email as EML File)

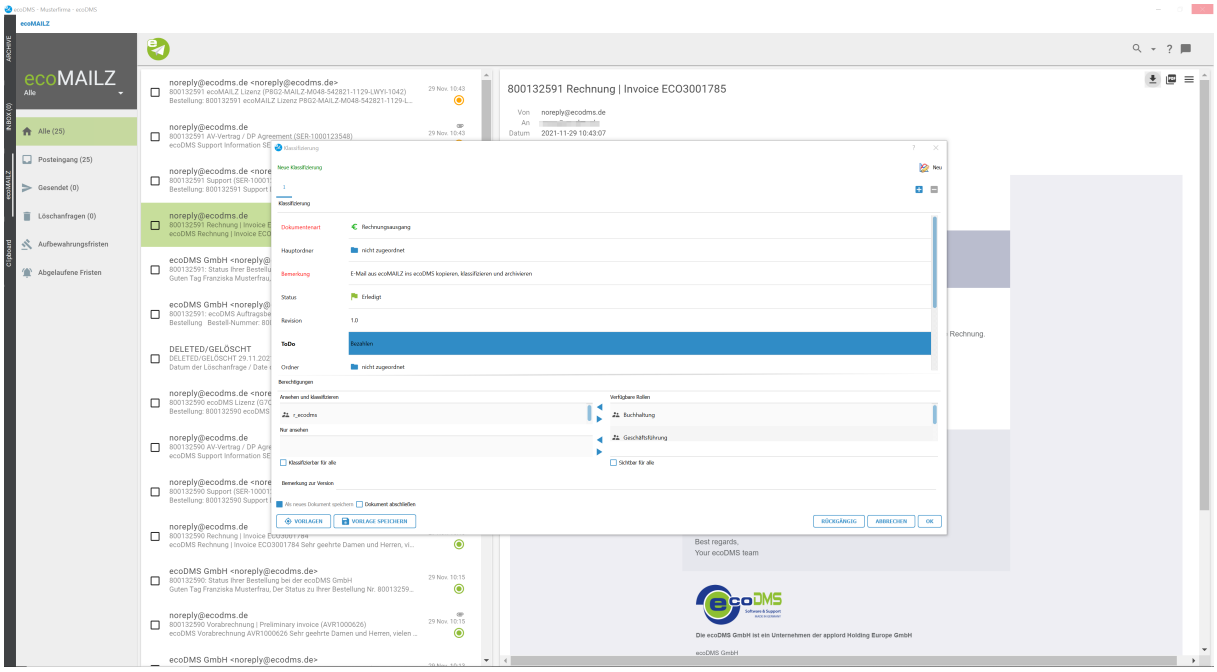


Figure 37.5: Email Options - Download - Classification of the Original Email

37.4 Download (PDF)

To download an email as PDF/A3 file, complete the following steps:

1. Select the email in the ecoMAILZ tab in ecoDMS.
    a) Desktop/PC/Screen: The email is highlighted in green.

2. Click the "Download (PDF)" icon in the email.
   a) The icon is located at the top right of the main window of the email.
3. The message, including any attachments, is converted into a PDF/A-3 file and downloaded. This process may take a while depending on the file content and size.

> **PDF/A-3-format:** You can embed any file type in PDF/A-3. For example, you can add email attachments such as PDF or Office files to a PDF/A-3 document. Thus, if you open a PDF/A-3 file, it contains the plain email text in PDF format and you also have access to the attachments within the PDF/A-3 file (refer to the second figure in this section).

4. ecoDMS displays a dialog with further download options:
   a) **Open:** Click the "Open" button to open the PDF/A-3 email file.

   - If the email is already in the download folder, this button is greyed out.
   - The email opens in the software specified for opening PDF files on your workstation.

   b) **Copy to ecoDMS:** Click the "Copy to ecoDMS" button to archive the PDF file of the email in ecoDMS. The classification dialog box opens. Enter the classification information to archive the email in ecoDMS.

   - ecoDMS displays a preview in the preview window of the classification dialog box.
   - ecoDMS only archives the PDF file.
   - For more information on classification and the general operation of the document management system, refer to the ecoDMS manual.

   c) **Display Download Folder:** Click the "Display Download Folder" button to open the folder in the file system.
   d) **Cancel:** If you do not want to execute any of the above mentioned options, click "Cancel".

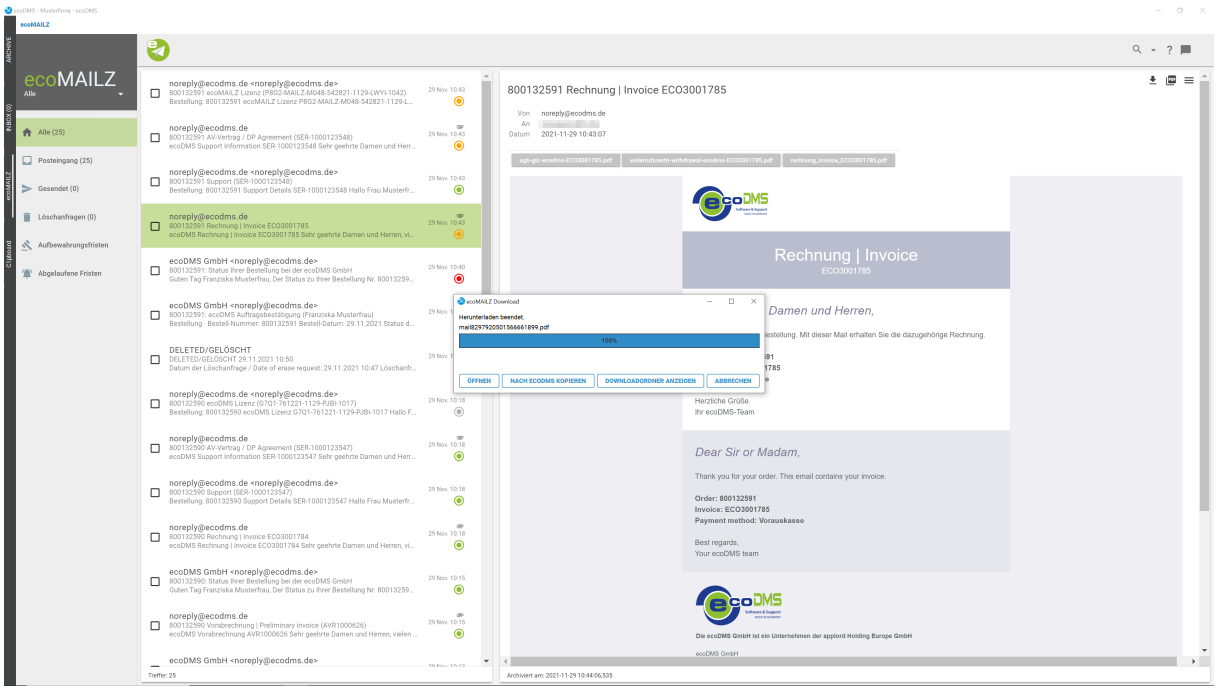


Figure 37.6: Email Options - Download (PDF)

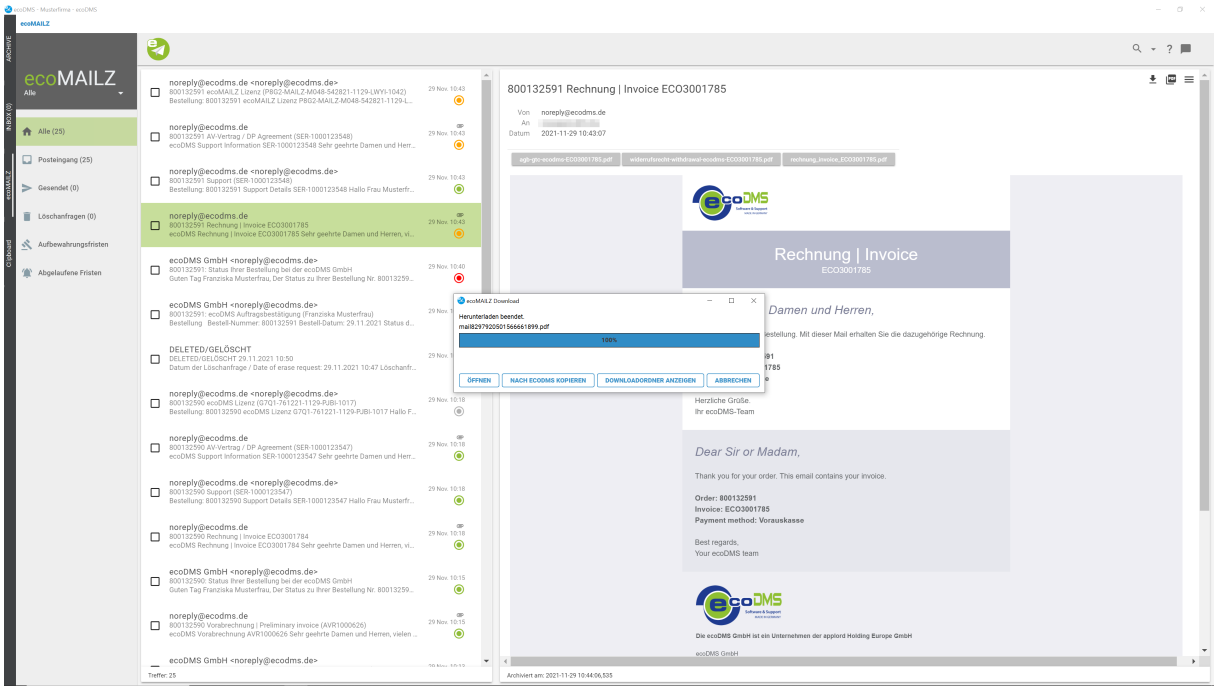


Figure 37.7: Email Options - Download (PDF)- Classification

38 ecoDMS Server

ecoDMS saves all settings, user information and classifications in a database of ecoDMS Server. The archived files and documents are securely encrypted and stored in containers. Spreading information across containers and a database offers more security and flexibility when managing data.

38.1 postgreSQL Database

ecoDMS uses postgreSQL, a free, cross-platform component, as its database. In contrast to most other databases, the database volume of postgreSQL is virtually unlimited. As postgreSQL is an open source database, no additional costs are incurred for using this database.

38.2 Container Storage System

The archived files and documents are stored safely encoded in containers within the user's ecoDMS server. The default data volume of such a container is approx. 500 MB. This is a fixed value specified by ecoDMS. As soon as the data volume is reached, the system automatically creates a new container. The "full" container, of course, will continue to exist. The maximum number of containers is unlimited in ecoDMS. The automatic generation of different containers makes data backup much easier. During the backup process the containers can be backed up separately and independent of the postgreSQL database.

38.3 Stop ecoDMS Server

This chapter describes how ecoDMS Server can be stopped if necessary.

38.3.1 Windows: Explanation

To stop the server under Ubuntu / Debian, complete the following steps:

1. Make sure that no other users are working with ecoDMS or are connected to ecoDMS Server.
    a) First, exit all Connection Managers connected to the server.
    b) Check and close all other connections to the server (e.g. web client...).
2. Open the "Services" manager of your windows system.

3. Select the service "ecoDMS Server 18.09".
4. Click "Stop the service".
    a) The server is stopped (this may take some time).

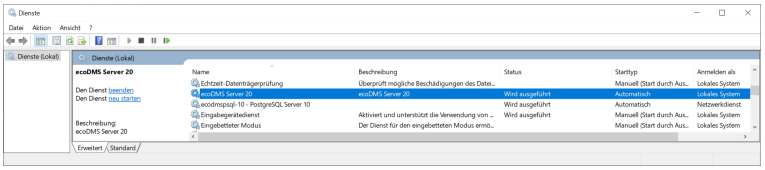


Figure 38.1: Windows - Services - ecoDMS Server

38.3.2 Ubuntu / DebiTo: Explanation

This chapter describes how ecoDMS Server can be started if necessary.

1. Make sure that no other users are working with ecoDMS or are connected to ecoDMS Server.
    a) First, exit all Connection Managers connected to the server.
    b) Check and close all other connections to the server (e.g. web client...).
2. Open the console.
3. Stop the server with the following command:

```
sudo service ecodms stop
```

38.4 Start ecoDMS Server

This chapter describes how ecoDMS Server can be started when needed.

38.4.1 Windows: Explanation

To (re)start the server under Windows, complete the following steps:

1. Make sure that no other users are working with ecoDMS or are connected to ecoDMS Server.
    a) First, exit all Connection Managers connected to the server.
    b) Check and close all other connections to the server (e.g. web client...).
2. Open the "Services" manager of your windows system.
3. Select the service "ecoDMS Server 18.09".
4. Click "Start" to start the service.
    a) The server is started (this may take some time).

5. If the operation was successful, you can reconnect the Connection Manager and all other connections to ecoDMS Server.
    a) Please note that depending on the computer, the server might need some time until it is completely booted and the connection is established.
    b) Please wait a few minutes and then try to connect to the server.

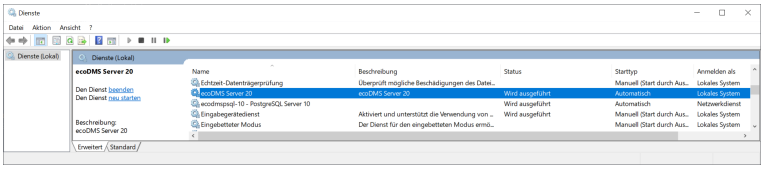


Figure 38.2: Windows - Services - ecoDMS Server

38.4.2 Ubuntu / DebiTo: Explanation

To start the server under Ubuntu / Debian, complete the following steps:

1. Make sure that no other users are working with ecoDMS or are connected to ecoDMS Server.
    a) First, exit all Connection Managers connected to the server.
    b) Check and close all other connections to the server (e.g. web client...).
2. Open the console.
3. Start the server with the following command:

```
sudo service ecodms start
```

4. If the operation was successful, you can reconnect the Connection Manager and all other connections to ecoDMS Server.
    a) Please note that depending on the computer, the server might need some time until it is completely booted and the connection is established. Please wait a few minutes and then try to connect to the server.

39 WORKZ Add-on

- The WORKZ add-on is a paid feature, but can be tested without obligation and free of charge in the ecoDMS demo version.
- It is an optional extension for the document management system.

The WORKZ add-on extends the ecoDMS document management system with features for automating document processes. It enables the automatic archiving of emails and attachments from defined mailboxes, as well as automated file storage from specified folders in the file system. Additionally, it supports the digitization of workflows by introducing acknowledgment and approval processes, which can be marked with digital stamps.

39.1 Installation and License Activation

- The WORKZ add-on does not require manual installation.
- It is activated through the ecoDMS license and can be tested in the demo version of ecoDMS.
- Further installation instructions, especially for Linux, NAS and Updates, can be found in the ecoDMS installation manual.
- The WORKZ add-on can be purchased in the ecoDMS online shop and added to the ecoDMS license.
- The duration of the add-on corresponds to the (remaining) duration of the update period of your ecoDMS license.
- After the duration expires, the add-on will be automatically deactivated.

License activation and management is performed by the administrator via the ecoDMS settings dialog.

- Open the "License" tab in the "Settings" section to view and manage your license information.

Further details on activating and deactivating a license can be found in the Manual under 2.

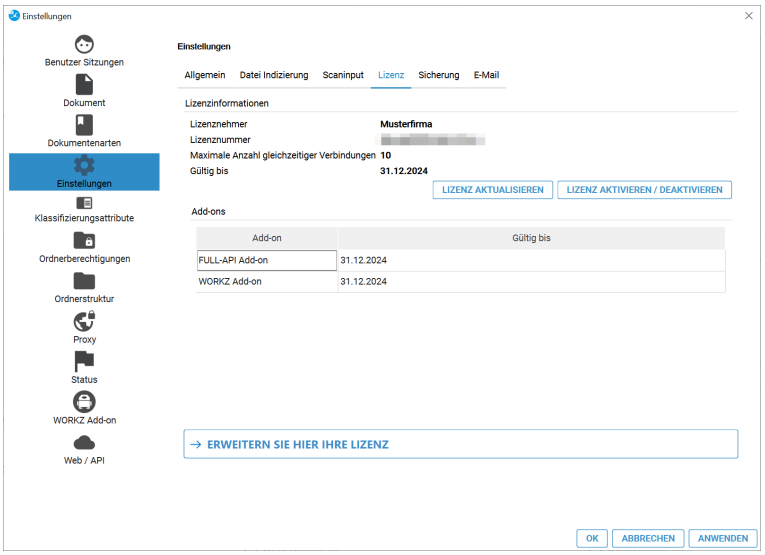


Figure 39.1: Settings - Settings - License (Here: Full Version with Full API and ecoWORKZ Add-on)

39.2 WORKZ Settings Dialog

- To display WORKZ in the Settings dialog, you need three prerequisites:
  1. The add-on is licensed
  2. The user is either an ecoDMS administrator
  3. or has an administrator permission for the WORKZ add-on
- **Note: To apply the settings for WORKZ, users must exit the ecoDMS client, disconnect the connection via the Connection Manager, and then reconnect!**

In the ecoDMS client Settings dialog, use the "WORKZ" tab to configure the WORKZ add-on and assign permissions.

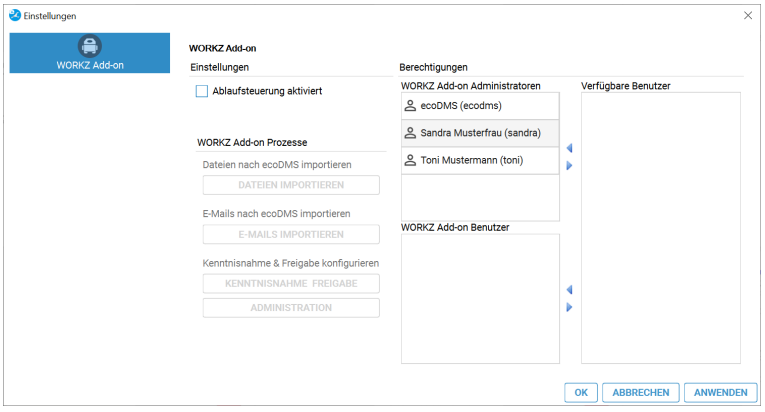


Figure 39.2: Settings - WORKZ Add-on

39.3 Activate and Assign Permissions for Process Control

For more information about individual features, refer to the corresponding chapter in this manual.

Enable Process Control to enable the following features: Acknowledgement and approval, including digital stamp, email import, file import.

39.3.1 Funktionen aktivieren

1. In the ecoDMS Settings, open the "WORKZ" tab (refer to 39.2)
2. Enable **Process control enabled**
3. Confirm the message with "OK"
4. Save the setting with "Apply"
5. To enable the new settings, exit the ecoDMS client, disconnect the connection via the Connection Manager, and then reconnect.

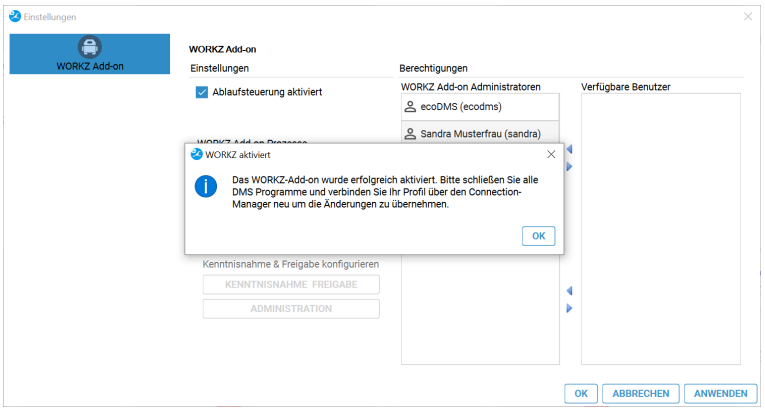


Figure 39.3: Settings - WORKZ Add-on - Enabled

39.3.2 Assign Permissions for Features

– To enable permissions, exit the ecoDMS client and reconnect via the Connection Manager.

If you enable Process Control (refer to 39.3) in the Settings, you can define permissions in the "Permissions" section for the following WORKZ features:

1. Use the arrows to drag the users to the respective areas.
   a) **Available users:** The area "Available Users" lists all available users.
   b) **WORKZ administrators:** All users in this list can access the "WORKZ" tab in the ecoDMS Settings dialog. On the "WORKZ" tab, users can define configurations and processes.
   c) **WORKZ users:** All users in this list have the permission to use the processes assigned to them in the WORKZ add-on.
2. Confirm the settings with "Apply" and/or "OK".
3. Click "Cancel" to exit the Settings.

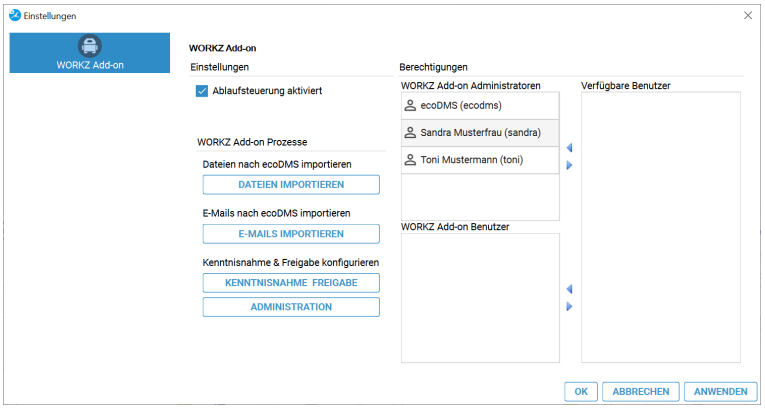


Figure 39.4: Settings - WORKZ Add-on - Permissions

39.4 Managing Acknowledgements and Approvals

As a WORKZ administrator, you can view current approval and acknowledgement processes and intervene in processes, This feature allows you to, for example, stop processes. Moreover, you can see which user has already worked on a process and which operations are still open.

1. Open the ecoDMS Settings
2. Options -> Settings -> Tab: WORKZ Add-on (refer to 39.2)
3. In the "Acknowledgements and Approvals" area, click "Administration".
4. The following features are available for the individual processes:
   a) Green arrow: Approve all / Acknowledge all
   b) Crossed out red circle: Reject all (only visible for approvals)
   c) Red circle with X: Cancel all (for approvals and acknowledgements

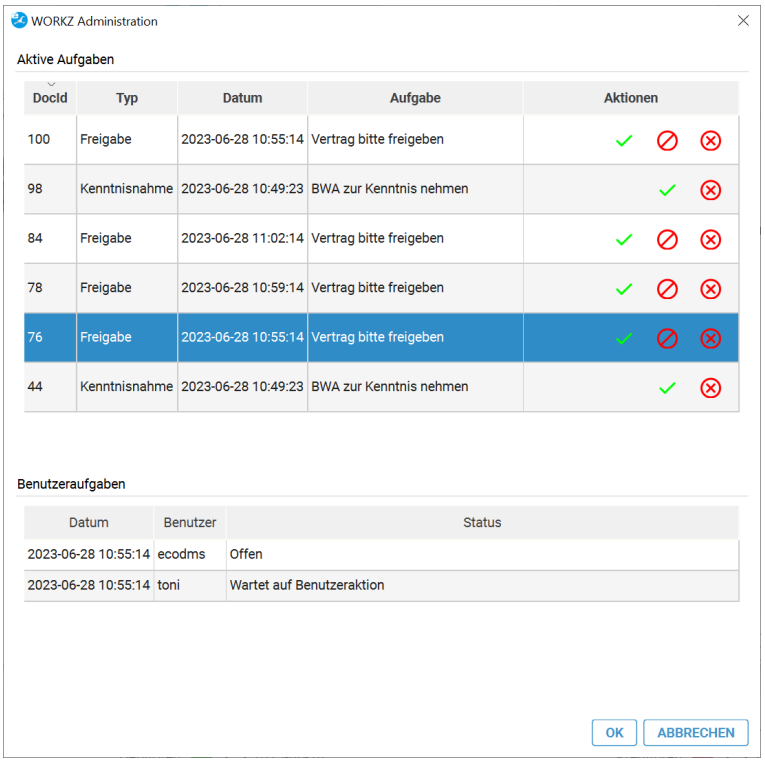


Figure 39.5: Settings - WORKZ Add-on - Permissions

39.5 Configure Notifications for Users

An item is added in the Configuration area for all roles (also individual user roles) when the WORKZ add-on is activated. Here you can configure the type of notification you want to send to the user (role) by email. To receive notifications, users need to have an email address in their profile. To define notifications, complete the following steps:

1. Log on to ecoDMS as administrator.
2. Click Options - User to open User and Group Management (refer to chapter 6.2)
3. Select an entry in the "Available Roles" area
   a) Before the dialog opens, ecoDMS checks whether an SMTP connection is saved in Options - Settings - Settings - Email (refer to chapter 7.4.6). If this is not the case, an error message displays.
   b) Make sure that valid email addresses have already been added to the user / role
4. Select the email notifications you want to send to the individual role (user, user group). The following check boxes are available:
   a) Email notification for new tasks
   b) Email notification for approval / acknowledgement from another user
   c) Email notification when approval from another user is denied
5. Confirm the message with "OK"

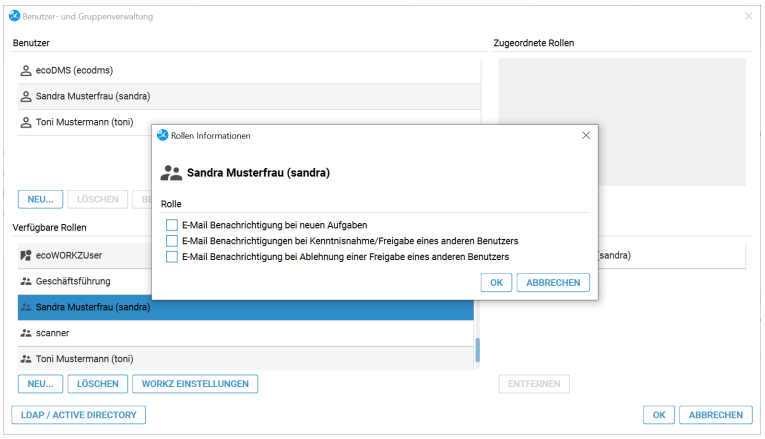


Figure 39.6: User Management - Role Information for Email Notification Settings

39.6 File Import

- Checks before saving:
  - No file import with the same name may exist
  - No file import with the same folder may exist
  - For import mode "recurring": The configured cron must have at least a 10-minute interval
  - For the action "move after retrieval" and "include subfolders", the folder to which files are moved must not be a subfolder of the folder from which files are retrieved

In ecoDMS, files can be automatically imported from a predefined directory located on the same instance as the ecoDMS Server.

39.6.1 Set up Import

1. ecoDMS settings dialog -> Tab "WORKZ Add-on" (see 39.2)
2. In the "WORKZ Add-on Processes" section -> Import files to ecoDMS -> Click the "Import Files" button
3. Right side of the window -> Click "**New**"
4. **Name:** Enter any name for the import here
5. **Configuration:** Make the desired settings according to section 39.7.3,

39.6.2 Configure File Import

Now you can further configure the import

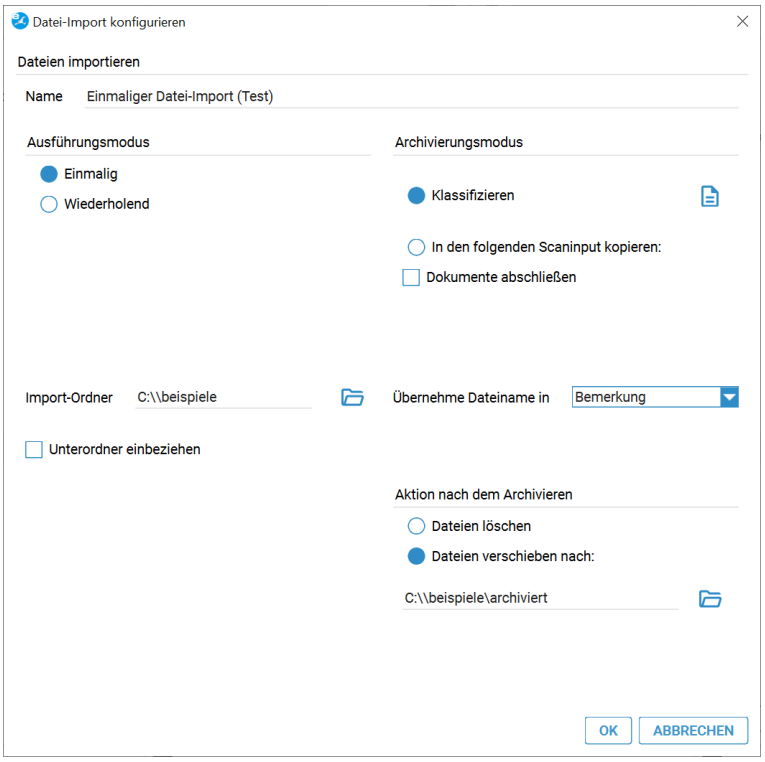


Figure 39.7: WORKZ Add-on – File Import (here: one-time) – Configuration (Example)

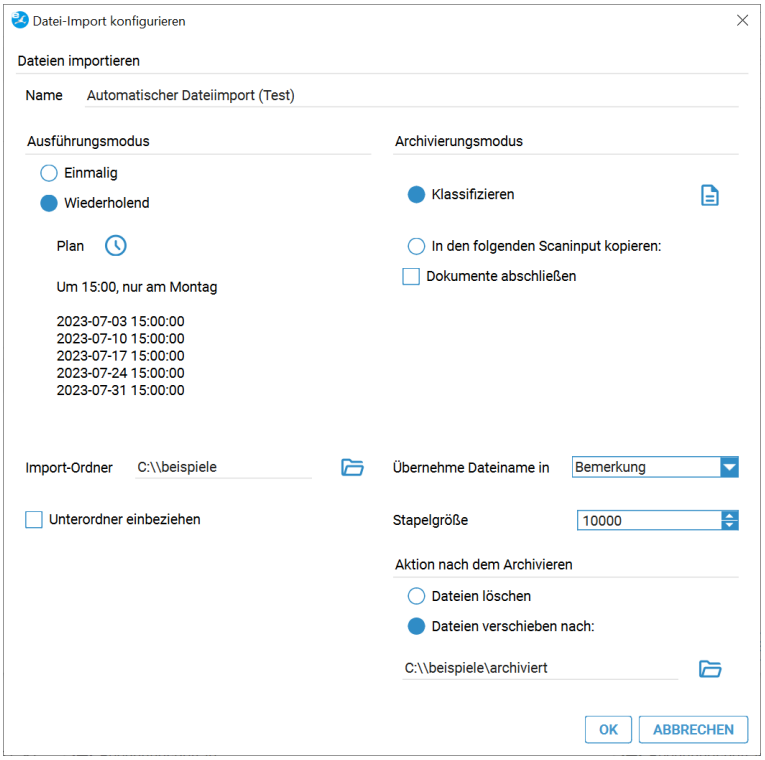


Figure 39.8: WORKZ Add-on – File Import (here: recurring) – Configuration (Example)

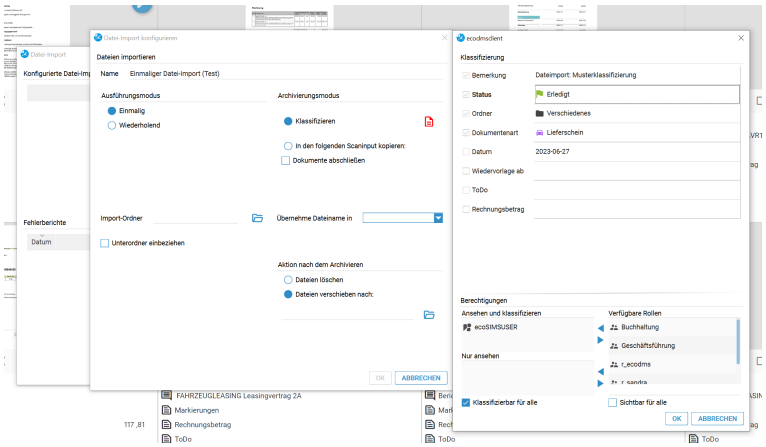


Figure 39.9: WORKZ Add-on – File Import (here: one-time) – Configuration and Classification (Example)

39.6.2.1 Execution Mode

Select how often the WORKZ Add-on should check the folder for new files. Activate the corresponding radio button.

39.6.2.1.1 One-time The import is executed once by manual start.

- Start import (see 39.6.3.1.2):
  - Open the overview of configured file imports
  - Click the "One-time Execution" icon
  - Confirm the subsequent message.

39.6.2.1.2 Recurring The import is automatically repeated at a defined interval.

- Batch size -> Activated as soon as "Recurring" is selected:
  - Specifies how many files are processed and imported into ecoDMS at the same time.
  - The field is located at the middle bottom right .
- Set interval: Click the "Schedule Icon" to define the timing:
  - Start: Start time (e.g., minute or hour) when the import is first executed.
  - Step: Interval between import runs.
    * *Example: Step = 15 -> the import runs every 15 minutes.*
  - Range: Time window during which imports are allowed.
    * *Example: Min = 10, Max = 30 -> the import runs only between minute 10 and 30 of each hour (e.g., from 15:10 to 15:30).*



Figure 39.10: WORKZ Add-on -> File Import -> Icon "Set Interval for Recurring Import"

- Start import (see 39.6.3.1.3):

- Open the overview of configured file imports
- Click the "Recurring Execution" icon and confirm the message.
- From this moment, the import will be automatically executed according to the set schedule.

39.6.2.2 Archiving Mode

You can specify how imported files should be processed:

- Classify uniformly
- Or copy into an ecoDMS Scaninput folder

39.6.2.2.1 Classify

- By clicking the icon, WORKZ opens the classification dialog of ecoDMS.
- The configured information applies to all imported files.



Figure 39.11: WORKZ Add-on -> File Import -> Icon "Classification"

39.6.2.2.2 Copy To The Following Scaninput

If you want to classify the attachments later in the ecoDMS inbox (e.g. using a Classification Template), the files can also be copied to a Scaninput folder.

- Please note the supported file formats according to 12.1.

39.6.2.2.3 Finalize Documents If you activate this checkbox, ecoDMS saves the documents so that no new versions can be added via version management.

39.6.2.3 Import Folder

Note: The directories "workdir" and "Scaninput" are excluded from the import.

- Specify the directory where the files to be archived are located.
- All documents stored there will be automatically imported into ecoDMS.

39.6.2.4 Include Subfolders

- When activated, the import will include not only files in the specified import folder but also all files in its subfolders.

39.6.2.5 Transfer Filename to

- The filename can optionally be transferred during classification into a text field (e.g., attribute "Comment").
- Simply select the desired attribute from the list of available classification fields.

39.6.2.6 Action After Archiving

Specify here what should happen to the files after successful import:

- **Delete files:** The file will be removed from the specified directory after archiving.
- **Move files to:**
  - The files will be moved to a target folder of your choice.
  - After activating the feature, you can select the desired target folder from the list of available directories.

39.6.3 Configured File Imports

This section provides an overview of all configured file imports as well as options to create new imports, edit existing ones, or perform manual actions.

1. ecoDMS settings dialog -> Tab "WORKZ Add-on" (see 39.2)
2. In the "WORKZ Add-on Processes" section -> Import files to ecoDMS -> Click the "Import Emails" button
3. At the top of the new window, you will see a table with all configured imports.
4. Below that is the "Error Reports" section, where any error messages are displayed sorted by date.

	Type: One-time
	Type: Recurring

39.6.3.1 Available Actions / Features

When you select an import in the table, the following features are available to you:

39.6.3.1.1 Stop Import Stops an import currently in progress. Useful, for example, in case of errors or short-term changes.



Figure 39.12: WORKZ Add-on -> File Import -> Icon "Stop Import"

39.6.3.1.2 Start Import (One-time)

> **Note:** The import only begins after the process has been saved and this feature has been actively executed.

Starts an import process one-time. This is primarily used for an import that does not run automatically.



Figure 39.13: WORKZ Add-on -> File Import -> Icon "Execute One-time"

39.6.3.1.3 Start Import (Recurring)

> **Notes:**
>
> - The import only begins after the process has been saved and this feature has been actively executed.
> - This icon is only visible if it is a recurring import.

Starts a file import configured to run recurring.



Figure 39.14: WORKZ Add-on -> File Import -> Icon "Recurring Execution"

39.6.3.1.4 Edit

> - Checks before saving:
>   - No file import with the same name may exist
>   - No file import with the same folder may exist
>   - For import mode "recurring": The configured cron must have at least a 10-minute interval
>   - For the action "move after retrieval" and "include subfolders", the folder to which files are moved must not be a subfolder of the folder from which files are retrieved

Opens the import for editing. You can adjust the settings as during the initial setup.

39.6.3.1.5 Delete Permanently removes the selected import if it is no longer needed.

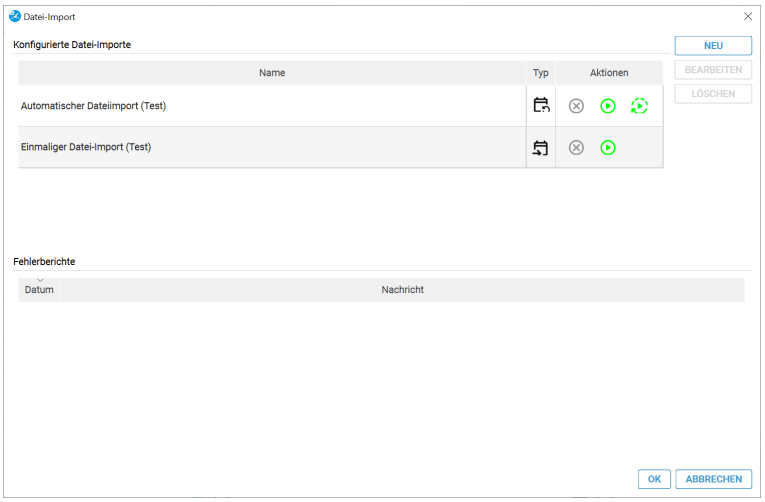


Figure 39.15: WORKZ Add-on – File Import – Process Overview

39.7 Email Import

In ecoDMS, emails can be automatically imported from various sources.

39.7.1 Set Up Microsoft 365 Mail Import

- A connection test must be successful before the data for the email import can be created or changed.
- A separate connection is created for each import.
- To set up and use the import for Microsoft 365, some basic settings in Microsoft Entra are required.
- Please refer to the notes in the ecoDMS knowledge base. Here you can learn more about the necessary app settings in Microsoft Entra.
- You can access the knowledge base at the following link:

```
https://wissensdatenbank.scroll.site/ek
```

1. ecoDMS settings dialog -> Tab "WORKZ Add-on" (see 39.2)
2. In the "WORKZ Add-on Processes" section -> Import emails to ecoDMS -> Click the "Import Emails" button
3. Right side of the window -> Click "**New**"
4. **Name:** Enter any label for the import here
5. **Connection (Microsoft 365):** Imports emails from Microsoft 365
6. **Settings** **:** Click the icon to configure the necessary mail server settings

- **Name:** Enter a name for the import
- **Folder ID (Client):** The Microsoft 365 folder ID (client) is a unique identifier that you assign to a Microsoft 365 folder to identify the resources and users within this folder
- **Application ID (Client):** The Microsoft 365 application ID (client) is a unique identifier that you assign to identify an application or a service within a Microsoft 365 folder to enable interaction between applications or services and the folder
- **Application Password:** Microsoft 365 uses the term "Secret" for classified information such as access keys, login data and other passcodes used to protect applications and services. Enter the secret client key associated with the application created in Microsoft Entra
- **Application User (ID or Email):** A Microsoft 365 application user is a special type of user account used for accessing resources and data with an application
- **Test Connection:** The system checks the mail server configurations.
- After verification, click "OK" to save the import

7. **Import Folder:** After a successful connection test, WORKZ displays all available mail folders on your mail server. Select the folder from which emails should be imported into ecoDMS.
8. **Configuration:** Make the desired settings according to section 39.7.3.
9. **Save** by clicking "OK"

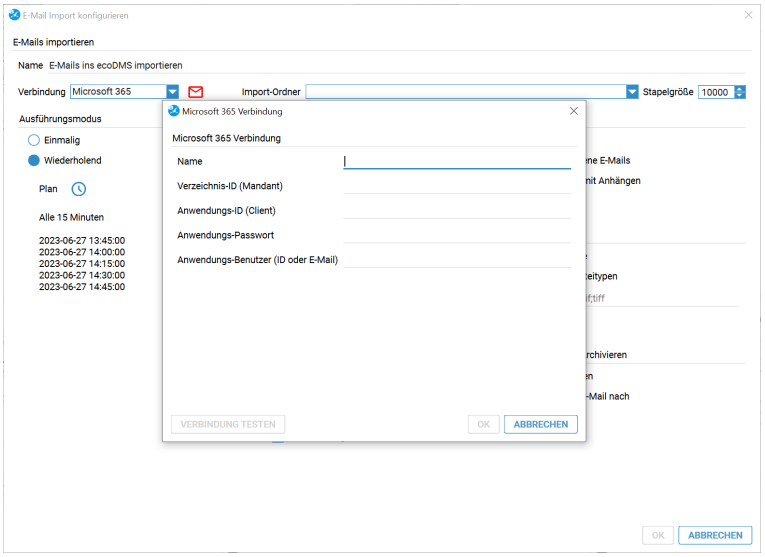


Figure 39.16: WORKZ Add-on - E-Mail Import - Konfiguration - Microsoft 365 Verbindung

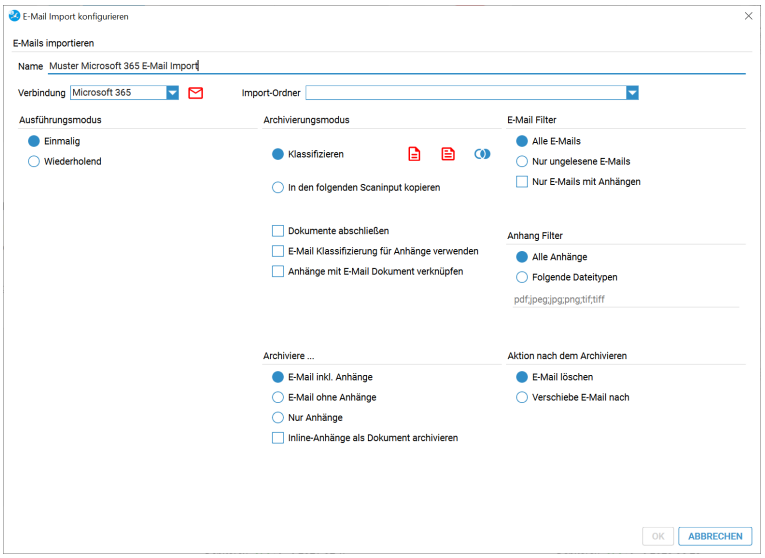


Figure 39.17: WORKZ Add-on - E-Mail Import - Konfiguration - Microsoft 365 (hier: einmalig)

39.7.2 IMAP Mail-Import einrichten

- A connection test must be successful before the data for the email import can be created or changed.
- A separate connection is created for each import.

1. ecoDMS settings dialog -> Tab "WORKZ Add-on" (see 39.2)
2. In the "WORKZ Add-on Processes" section -> Import emails to ecoDMS -> Click the "Import Emails" button
3. Right side of the window -> Click "**New**"
4. **Name:** Enter any label for the import here
5. **Connection (IMAP):** Imports emails from IMAP
6. **Settings** : Click the icon to configure the necessary mail server settings
   - **Name:** Enter a name for the import
   - **Server:** Enter the address of your email server. This can, for example, be an IP address or a server name, depending on your mail server configuration
     - **Port:** Enter the server port for the inbox of your email server
     - **Username:** Enter the username for the email account you want to archive
     - **Password:** Enter the password associated with the username.
     - **Type:** IMAP
     - **Connection Encryption:** Select the encryption: None, SSL/TLS, STARTTLS

- **Ignore Certificate Error (insecure):** If you want to ignore certificate errors when archiving, enable this feature
- **Test Connection:** The system checks the mail server configurations.
- After verification, click "OK" to save the import

7. **Import Folder:** After a successful connection test, WORKZ displays all available mail folders on your mail server. Select the folder from which emails should be imported into ecoDMS.
8. **Configuration:** Make the desired settings according to section 39.7.3.
9. **Save** by clicking "OK"

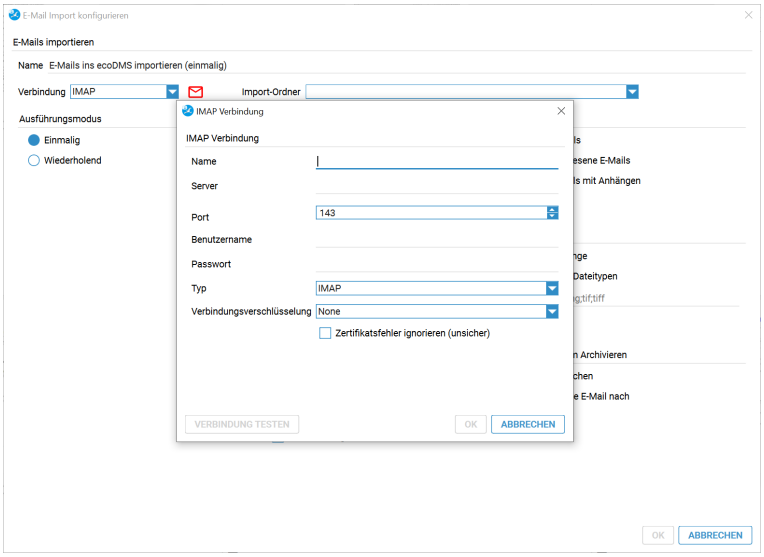


Figure 39.18: WORKZ Add-on – Email Import – Configuration – IMAP Connection

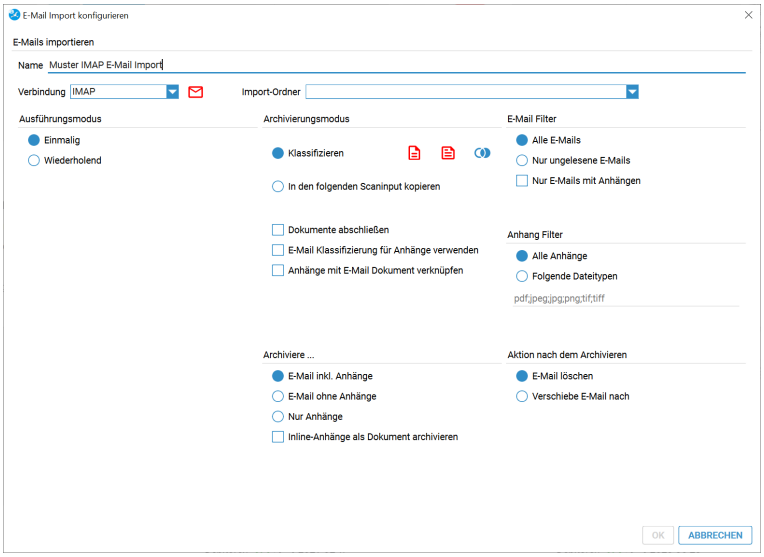


Figure 39.19: WORKZ Add-on – Email Import – Configuration – IMAP (here: one-time)

39.7.3 Configure Email Import

After you have set up the connection to your email account (IMAP or Microsoft 365) with the correct data, you can further configure the email import.

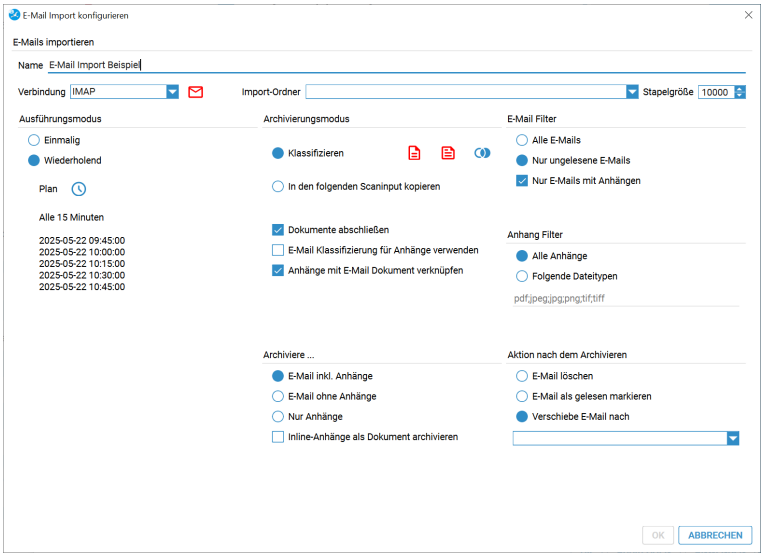


Figure 39.20: WORKZ Add-on -> Configure Email Import

39.7.3.1 Execution Mode

Select how often the WORKZ Add-on should check the folder for new emails. Activate the corresponding radio button.

39.7.3.1.1 One-time The import is executed once by manual start.

- Start import (see 39.7.4.1.2):
  - Open the overview of configured mail imports
  - Click the "One-time Execution" icon
  - Confirm the subsequent message.

39.7.3.1.2 Recurring The import is automatically repeated at a defined interval.

- Batch size -> Activated as soon as "Recurring" is selected:
  - Specifies how many mails are processed and imported into ecoDMS at the same time.
- Set interval: Click the "Schedule Icon" to define the timing:
  - Start: Start time (e.g., minute or hour) when the import is first executed.
  - Step: Interval between import runs.
    - *Example: Step = 15 -> the import runs every 15 minutes.*
  - Range: Time window during which imports are allowed.
    - *Example: Min = 10, Max = 30 -> the import runs only between minute 10 and 30 of each hour (e.g., from 15:10 to 15:30).*



Figure 39.21: WORKZ Add-on -> Mail Import -> Icon "Set Interval for Recurring Import"

- Start import (see 39.7.4.1.3):
  - Open the overview of configured file imports
  - Click the "Recurring Execution" icon and confirm the message.
  - From this moment, the import will be automatically executed according to the set schedule.

39.7.3.2 Archiving Mode

You can define how imported emails and attachments should be processed:

- Classify uniformly
- Or copy to an ecoDMS Scaninput folder

39.7.3.2.1 Classify The following options are available for classification:

39.7.3.2.1.1 Classification for Emails

- Clicking the icon opens the ecoDMS classification dialog via WORKZ.
  - The configured information applies to all imported emails.



Figure 39.22: WORKZ Add-on -> Email Import -> Icon "Classification for Emails"

39.7.3.2.1.2 Classification for Attachments

- Clicking the icon opens the ecoDMS classification dialog via WORKZ.
  - The configured information applies to all imported email attachments.



Figure 39.23: WORKZ Add-on -> Email Import -> Icon "Classification for Attachments"

39.7.3.2.1.3 Link Email Attributes to Classification

- Email data can be automatically transferred into the classification. For each email value, suitable classification attributes can be selected. These values will then be used by default for classifying the emails.
- If you also want to apply the classification to attachments, activate the option "Also apply classification to attachments" by checking the corresponding box at the end of this window.

Subject: is entered into a text field (e.g., Comment)

Received Date: can be saved either as a date (date only) or as text with a timestamp (format: yyyy-MM-dd HH:mm:ss)

Sent Date: can be saved either as a date (date only) or as text with a timestamp (format: yyyy-MM-dd HH:mm:ss)

Sender: Sender is entered as text

Recipient: Recipient as text, multiple recipients separated by commas

CC: CC recipients as text, multiple recipients separated by commas

BCC: BCC recipients as text, multiple recipients separated by commas

Attachment Name: filename of the attachment (applies to attachments only)

If "Use Email Classification for Attachments" is enabled, this value overrides the attachment classification.



Figure 39.24: WORKZ Add-on -> Email Import -> Icon "Link Email Attributes to Classification"

39.7.3.2.2 Copy to the Following Scaninput

If you want to classify the attachments later in the ecoDMS inbox (e.g., using a Classification Template), the attachments can also be copied to a Scaninput folder.

- This feature applies only to email attachments
- Please observe the supported file formats according to 12.1.

39.7.3.2.3 Finalize Documents If you activate this checkbox, ecoDMS saves the documents so that no new versions can be added via Version Management anymore.

39.7.3.2.4 Use email classification for attachments Activate this option if attachments should receive the same classification as the email.

- The separate feature "Classification for attachments" will be automatically deactivated.
- Email and attachment then share a uniform classification.

39.7.3.2.5 Link Attachments with Email Document When importing, emails and their attachments are by default saved as separate documents in ecoDMS. All attachments of an email are collected and shown expandable in the table view in the "Attachments" area. The attachments that should become their own documents (not all attachments of an email have to be) can later be found under "Linked Documents". This is exactly what this feature does (see 22).

1. When you activate the option "Link Attachments with Email Document", the following happens:

a) The email is saved as the main document.

b) b) The attachments are displayed as "linked documents" under the email – with their own classification.

c) c) The attachments are initially collapsed but can be expanded if needed.

d) d) This way, related documents remain clear and well organized – similar to a paperclip holding several pages together.



Figure 39.25: WORKZ Add-on -> Email Import -> "Link Attachments with Email Document" -> here: Result in the table view

39.7.3.3 Email Filter

With the email filter, you define which emails should be imported into ecoDMS at all:

- **All emails:** All emails are imported — regardless of read status.
- **Only unread emails:** Only emails that have not yet been read are imported.

Additionally, you have the option to restrict the import to emails with attachments:

- **Only emails with attachments:** Only emails that contain at least one attachment, matching the attachment filter, are considered.

39.7.3.4 Attachment Filter

The attachment filter determines which types of attachments should be archived:

- **All attachments:** All attachments are archived regardless of file type.
- **Following file types:** Only certain file formats are archived (e.g., PDF, JPG, TIFF).
  - Simply enter multiple desired file extensions separated by semicolons, e.g.

```
pdf;jpg;tiff
```

39.7.3.5 Archive...

Here you select exactly what should be archived from the email:

- **Email including attachments:** The complete email including the previously defined attachments is archived.
- **Email without attachments:** Only the email itself is archived — existing attachments are ignored.
  - Important: If certain attachment file types are specified here, this setting only applies if "ONLY EMAILS WITH ATTACHMENTS" is activated (see 39.7.3.3).
  - Emails without matching attachments will then not be imported.
- **Only attachments:** Only the attachments are archived — the email itself is not saved.
- **Archive inline attachments as document:** Embedded content in the email (e.g., logos or embedded images, or for example also PDF files if defined as inline attachments) are archived as separate documents.

39.7.3.6 Action after Archiving

Here you define what should happen to the emails after successful import:

- **Delete email:** The email is removed from the mail server after archiving.
- **Mark email as read:** This option is relevant if "ONLY UNREAD EMAILS" was previously selected (see 39.7.3.3). The imported email is then marked as read.
- **Move emails to:** After archiving, the email is moved to a folder you specify in the email account. Once you activate this feature, you can select the desired target folder from the list of available folders in the connected email account.

39.7.4 Configured Email Imports

In this section, you get an overview of all already configured email imports as well as options to create new imports, edit existing ones, or perform manual actions.

1. ecoDMS settings dialog -> Tab "WORKZ Add-on" (see 39.2)
2. In the section "WORKZ Add-on Processes" -> Import emails into ecoDMS -> Button "Import emails"
3. At the top of the new window, you see a table with all configured imports.
4. Below is the section "Error reports," where any error messages are displayed sorted by date.

	Type: One-time
	Type: Recurring

39.7.4.1 Available Actions / Features

When you select an import in the table, the following features are available:

39.7.4.1.1 Stop Import Stops a currently running import. Useful, for example, in case of errors or short-term changes.



Figure 39.26: WORKZ Add-on -> Email Import -> Icon "Stop import"

39.7.4.1.2 Start Import (one-time)

> **Note:** The import only begins after the process has been saved and this feature has been actively executed.

Starts an import process one-time. This is mainly used for imports that do not run automatically.



Figure 39.27: WORKZ Add-on -> Email Import -> Icon "Execute one-time"

39.7.4.1.3 Start Import (recurring)

Notes:

- The import only begins after the process has been saved and this feature has been actively executed.
- This icon is only visible if it is a recurring import.

Starts a recurring configured email import.



Figure 39.28: WORKZ Add-on -> Email Import -> Icon "Recurring execution"

39.7.4.1.4 Edit

Opens the import for editing. You can adjust the settings as with the initial setup.

- A connection test must be successful in order to create/change the data for the email import.

39.7.4.1.5 Delete

Permanently removes the selected import if it is no longer needed.

39.8 Acknowledgement

Please note the following information for the ecoWORKZ version:

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

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

39.8.1 Configure Acknowledgements

To configure an acknowledgement process, complete the following steps:

1. Open the ecoDMS Settings
2. Options -> Settings -> Tab: WORKZ Add-on
3. Click the "Acknowledgement & Approval" button.
4. Click "New"
5. **Name:** Enter a process name
6. **Assigned Participants:** Drag users and/or groups participating in the process from "Available Users & Groups" to the "Assigned Participants" pane.
    a) **Group Assignment:** If you select at least one user group or system permission, you have the following options:
        i. **One Member:** From all selected participants, 1 member must confirm the acknowledgement to finalize and end the process
        ii. **All Members:** All selected participants must confirm the acknowledgement to finalize and end the process
7. **Action (Acknowledgement):** Select the "Acknowledgement" radio button.
8. **Classify after Acknowledgement:** Assign the classification information you want to apply to a document after confirming the acknowledgement
9. **Task:** Define the task to give more detailed instructions to the responsible users
10. **Automatic Trigger:** Set up a process so that it automatically applies to the relevant documents once it has started
    a) **Status (which triggers a process):** Choose the status a document needs to have in ecoDMS to trigger an automatic process
    b) **Document Type (which triggers a process):** Choose the document type which a document also needs to have in ecoDMS to trigger an automatic process

    a) Once a document is classified in ecoDMS with the attributes (status and document type) you configure here, the process starts and the responsible users receive a task in the "Acknowledgements and Approvals" pane. "
    b) An "Eye" icon is automatically added to the respective documents once the system has detected a task (Table view: Next to DocID, Card view: Next to File type)
    c) **No Automatic Trigger:** If you do NOT select "Trigger automatically", you must trigger the process manually for your documents in ecoDMS (Feature in program header: "Acknowledgement and Approval")

11. Click "Save" to save or "Cancel" to abort the process.

a) The process is saved to the "Acknowledgement & Approval" pane and can be started from here in the "Active" column

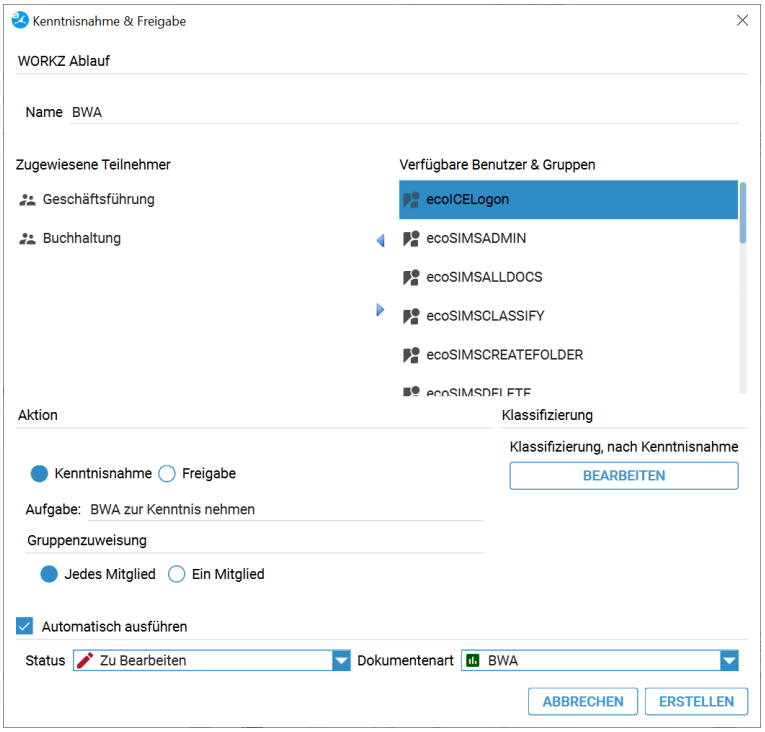


Figure 39.29: WORKZ Add-on - Configure Acknowledgement - Example

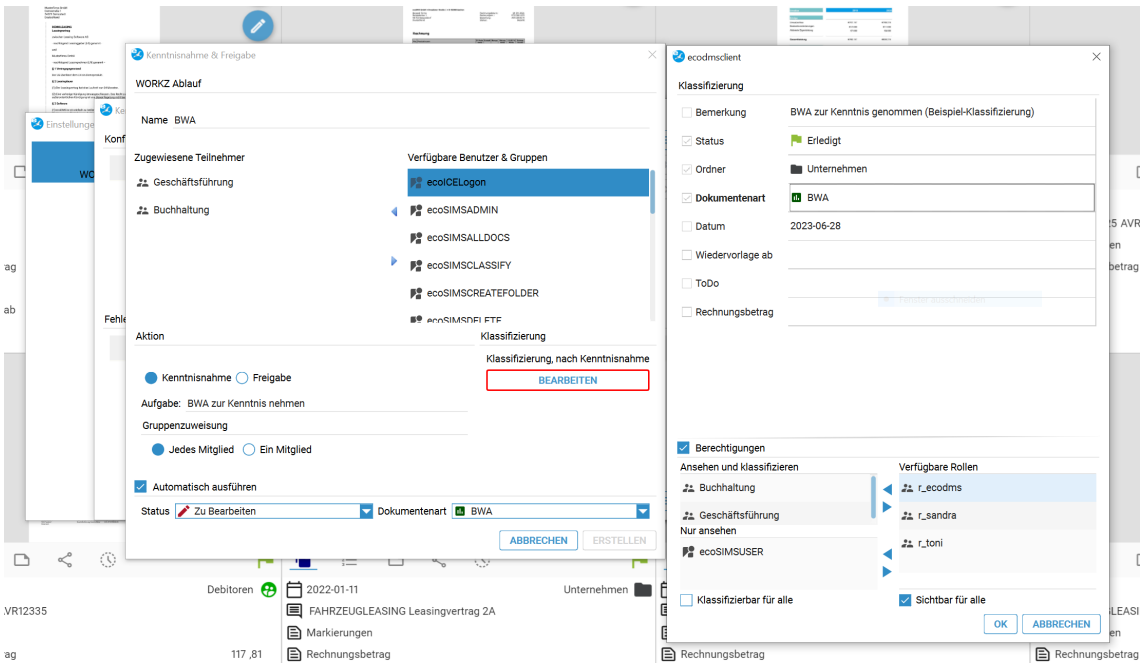


Figure 39.30: WORKZ Add-on - Configure Acknowledgement - Classification Example

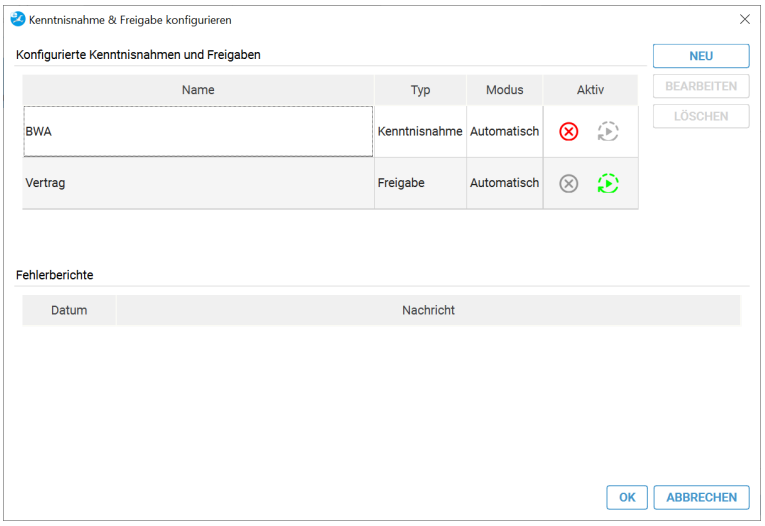


Figure 39.31: WORKZ Add-on - Overview of Configured Acknowledgements and Approvals

39.8.2 Acknowledge

To acknowledge a PDF, complete the following steps:

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



Figure 39.32: WORKZ Add-on - Task Overview in ecoDMS Client - Acknowledgements and Approvals

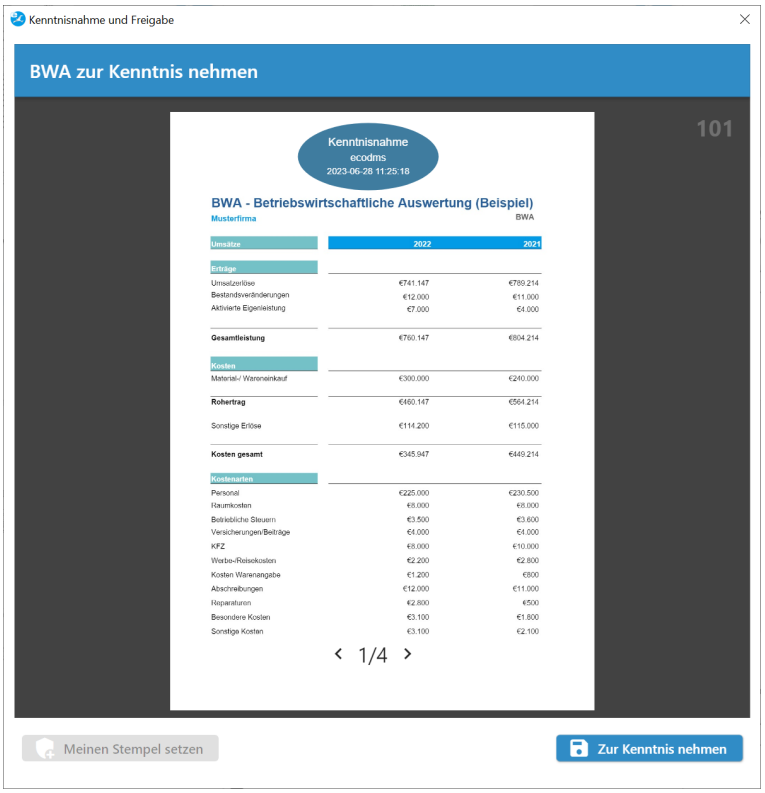


Figure 39.33: WORKZ Add-on - Acknowledge and Apply Stamp (Here: Versionable File)



Figure 39.34: WORKZ Add-on - Acknowledgement History

39.8.3 Acknowledge Manually

Different processes require different measures. You may need to involve other users to work on an archived file that requires additional clarification or action. Therefore, all users with permission for the WORKZ add-on can start manual processes. Use the "Acknowledgement and Approval" feature in the ecoDMS header to start single processes.

- In the list box, choose from all processes you created in the Settings.
- If you edit existing processes here, the changes will not affect the original, saved processes. The edits will only apply to the manual process that you execute.

1. Select the documents in ecoDMS
2. Select the "Acknowledgement & Approval" feature in the ecoDMS header
3. The add-on displays the DocID of the selected documents
4. **ecoWORKZ Process:** The list box lists all available processes.
   a) Choose an existing process.
      i. The fields populate with the template settings, which you can modify for this manual process.
   b) You can also make individual settings instead of using a template
      i. Refer to the following chapters of this manual for more information on how to configure acknowledgements 39.8 and approvals 39.9.
5. **End of Process Email Notification for Initiator:** As a creator of the acknowledgement, you can receive an automatic email message from ecoDMS after the processes is complete. To do so, your email address must be available in your user profile (also refer to chapter 6.2) Enable this feature.
6. Click "Share via WORKZ" to save the process, or click "Cancel" to abort the process.
   a) The Settings display to the respective users as available processes.

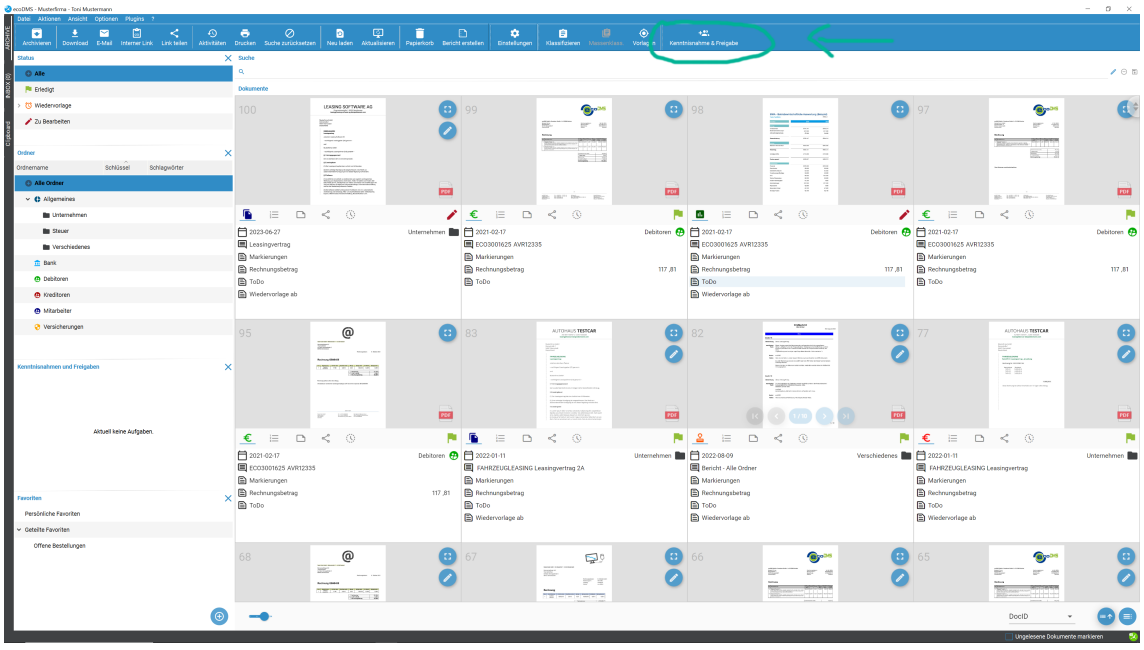


Figure 39.35: WORKZ Add-on - Trigger Manual Approval Process - Feature Button

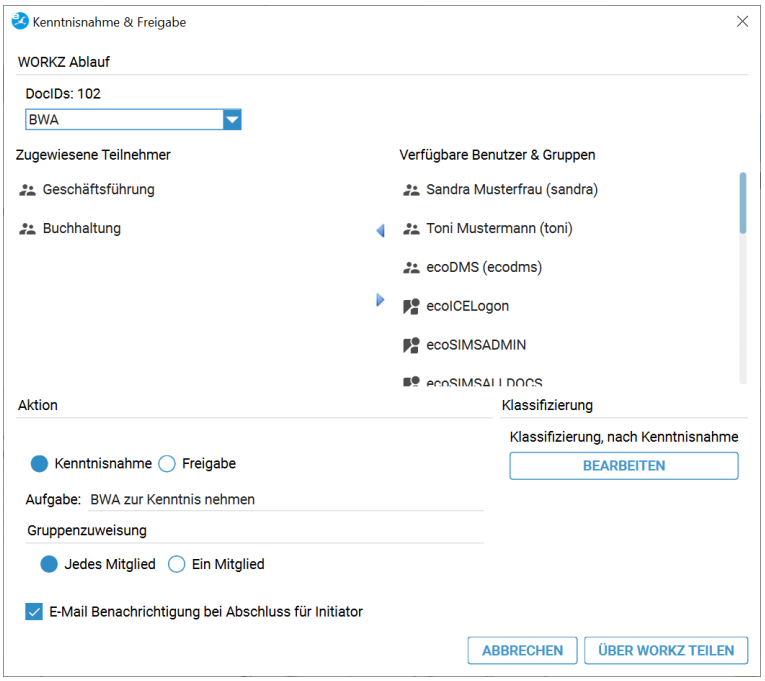


Figure 39.36: WORKZ Add-on - Create Manual Acknowledgement Process

39.9 Approval

Please note the following information for the ecoWORKZ version:

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

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

39.9.1 Configure Approval

To configure an approval, complete the following steps:

1. Open the ecoDMS Settings
2. Options -> Settings -> Tab: WORKZ Add-on
3. Click the "Acknowledgement & Approval" button.

4. Click "New"
5. **Name:** Enter a process name
6. **Assigned Participants:** Drag users and/or groups participating in the process from "Available Users & Groups" to the "Assigned Participants" pane.
    a) **Group Assignment:** If you select at least one user group or system permission, you have the following options:
        i. **One Member:** From all selected participants, 1 member must confirm the acknowledgement to finalize and end the process
        ii. **All Members:** All selected participants must confirm the acknowledgement to finalize and end the process
7. **Action (Approval):** Select the "Approval" radio button.
8. **Classify If Not Approved:** Assign classification information you want to apply to the document following approval.
9. **Classify If Not Approved:** Assign classification information you want to apply to the document if the approval is rejected.
10. **Task:** Define the task to give more detailed instructions to the responsible users
11. **Automatic Trigger:** Set up a process so that it automatically applies to the relevant documents once it has started
    a) **Status (which triggers a process):** Choose the status a document needs to have in ecoDMS to trigger an automatic process
    b) **Document Type (which triggers a process):** Choose the document type which a document also needs to have in ecoDMS to trigger an automatic process

    a) Once a document is classified in ecoDMS with the attributes (status and document type) you configure here, the process starts and the responsible users receive a task in the "Acknowledgements and Approvals" pane.
    b) An "Eye" icon is automatically added to the respective documents once the system
    c) **No Automatic Trigger:** If you do NOT select the "Trigger automatically" feature, you must trigger the process manually for the documents you select in ecoDMS (feature only available in table view).

12. Click "Save" to save or "Cancel" to abort the process.
    a) The process is saved to the "Acknowledgement & Approval" pane and can be started from here in the "Active" column

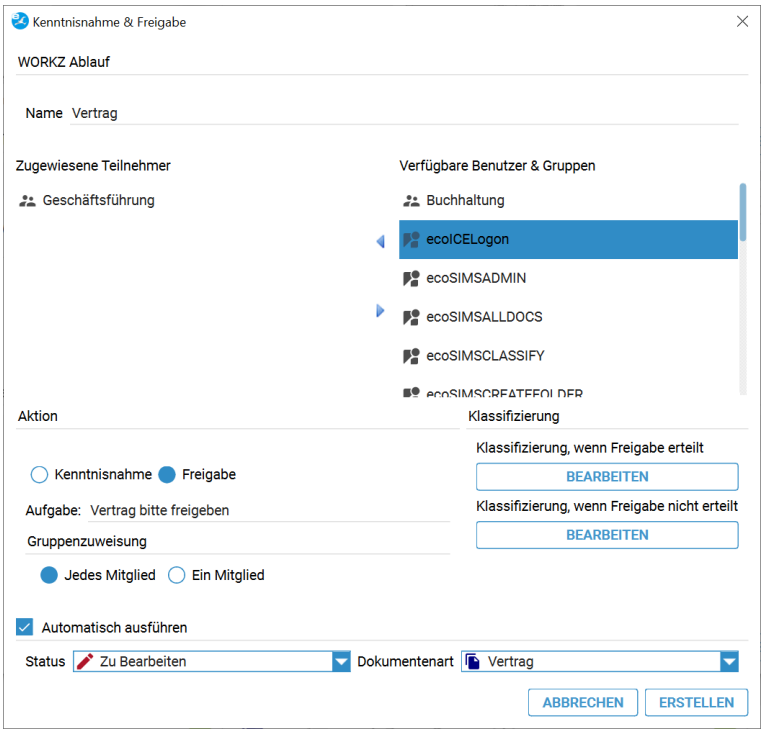


Figure 39.37: WORKZ Add-on - Configure Approval - Example

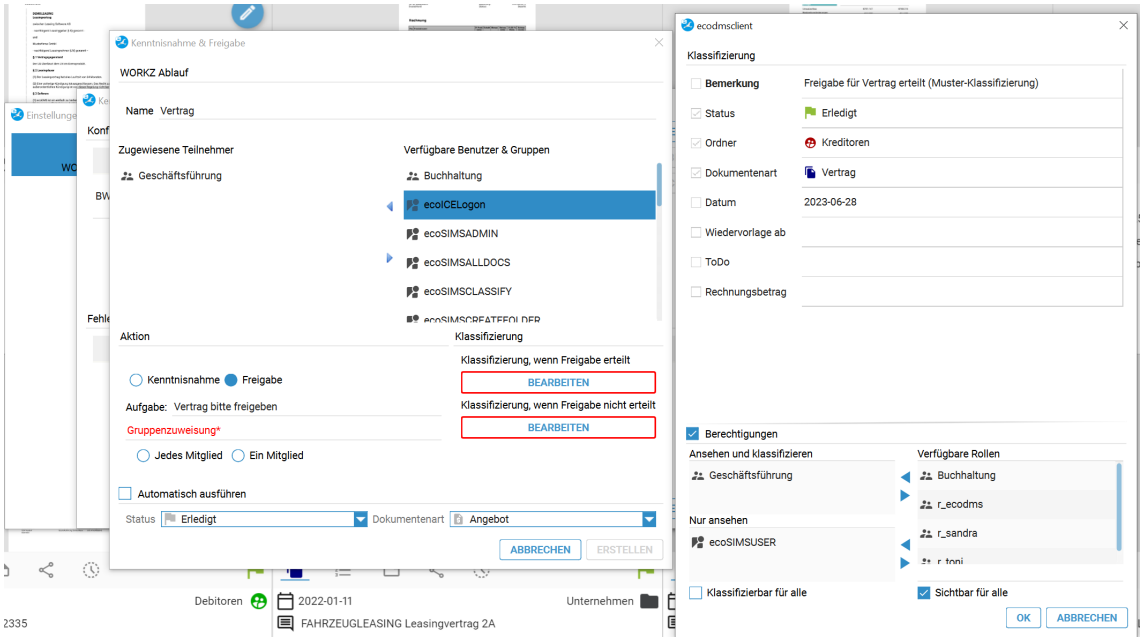


Figure 39.38: WORKZ Add-on - Approved - Classification Example

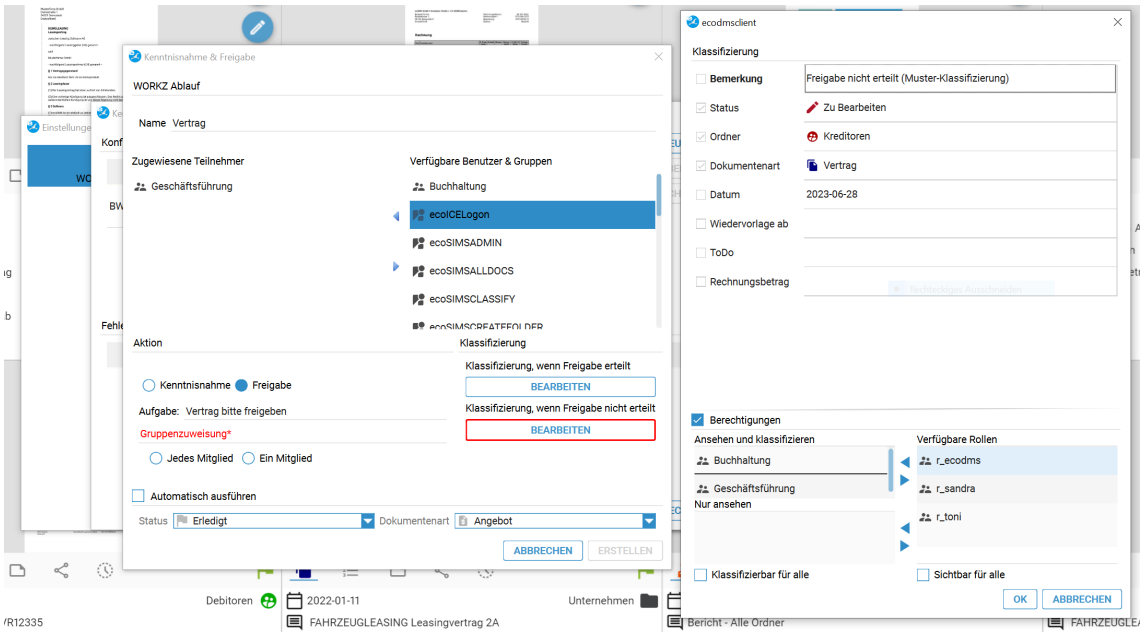


Figure 39.39: WORKZ Add-on - Not Approved - Classification Example

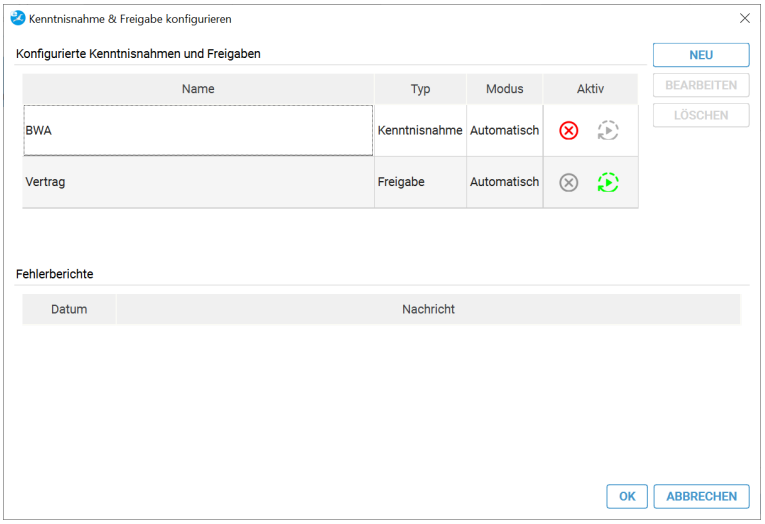


Figure 39.40: WORKZ Add-on - Overview of Configured Acknowledgements and Approvals

39.9.2 Approve

To approve a document, complete the following steps:

1. The "Acknowledgement and Approval" pane displays all open tasks
2. Click the title of the "Approval".
3. **Document:** For PDF files, ecoDMS displays a document preview.
4. **Task:** Process details display above the document
    a) **Approve:** Click this radio button to approve the document

5. **Apply My Stamp:** If you are working with a versionable PDF file, you can apply a digital stamp. The stamp documents the response to the task, which user executed the process and when.
6. To finalize and save the process, click "Execute"
7. The add-on automatically applies the classification attributes you assigned to the process, as soon as the process has been completed by all responsible users
8. The entry automatically disappears from the list of your processes once it has been processed
9. The response is documented in the history
10. If you applied a stamp, ecoDMS creates a new version of this document

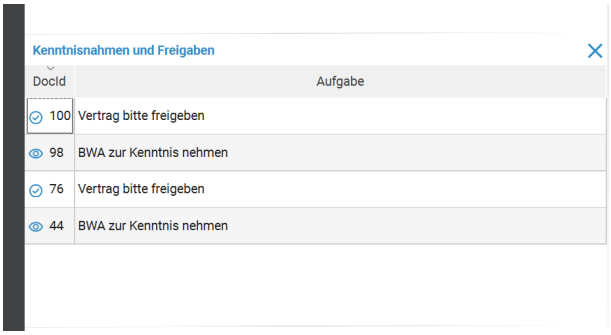


Figure 39.41: WORKZ Add-on - Task Overview in ecoDMS Client - Acknowledgements and Approvals

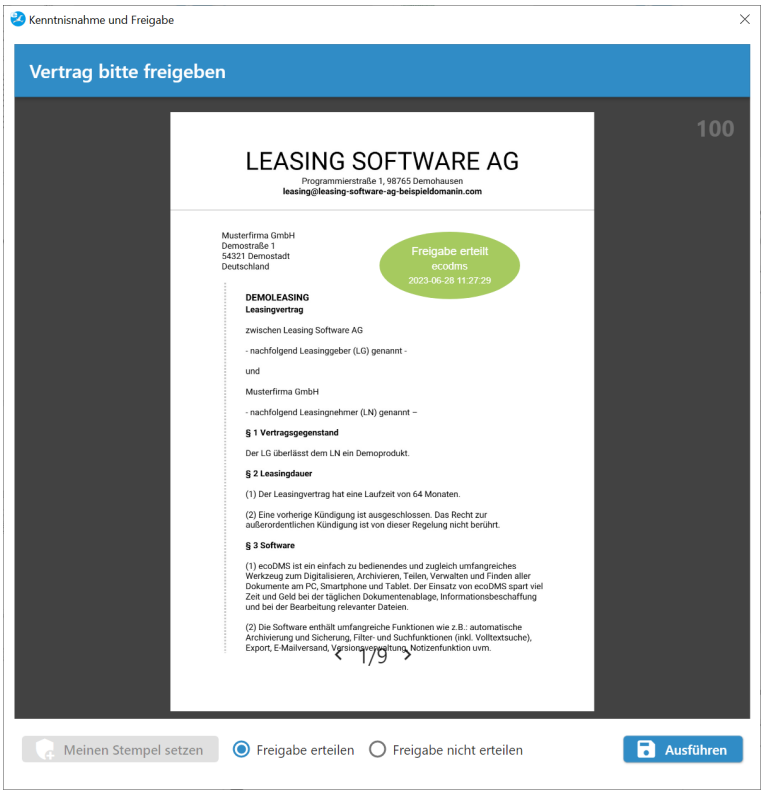


Figure 39.42: WORKZ Add-on - Approve and Apply Stamp (Here: Versionable File)

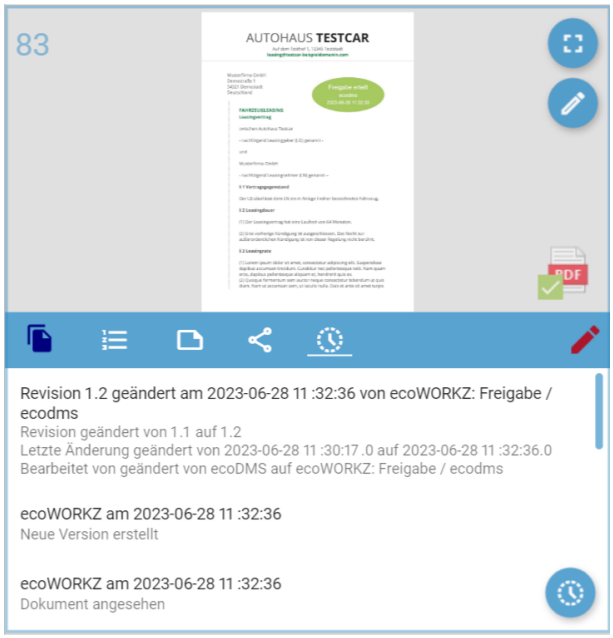


Figure 39.43: WORKZ Add-on - Approval History

39.9.3 Reject Approval

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

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



Figure 39.44: WORKZ Add-on - Task Overview in ecoDMS Client - Acknowledgements and Approvals

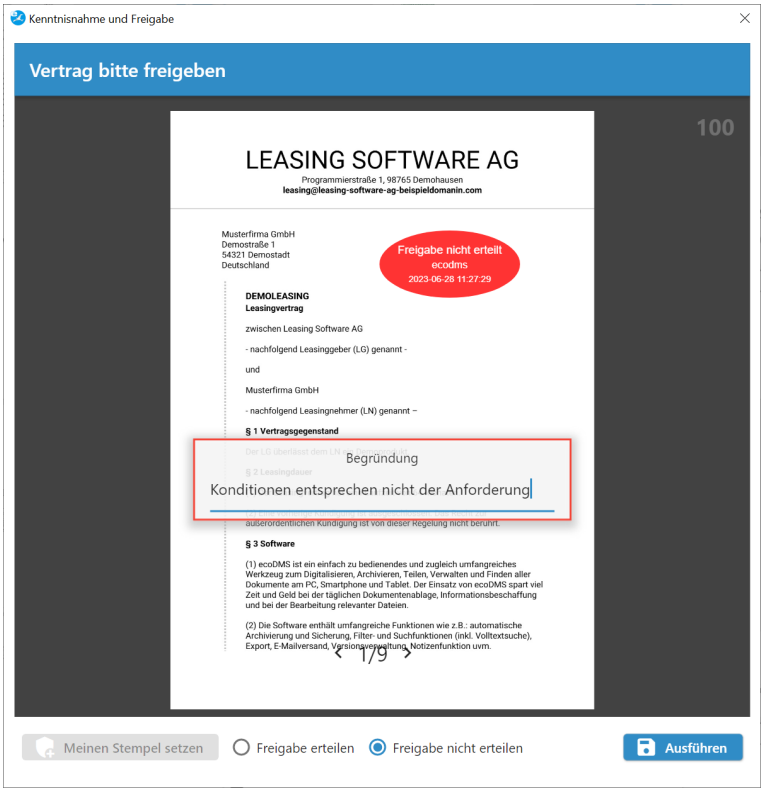


Figure 39.45: WORKZ Add-on - Reject Approval with Reason and Stamp (Here: Versionable File)

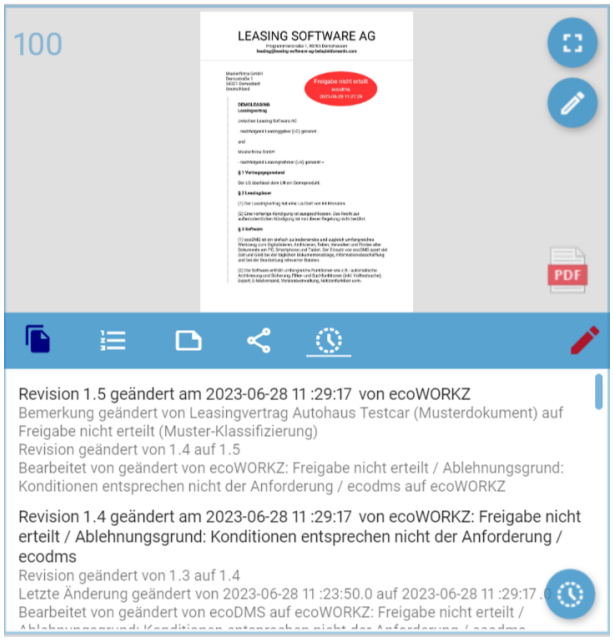


Figure 39.46: WORKZ Add-on - Rejected Approval History

39.9.4 Create Manual Approval

Different processes require different measures. You may need to involve other users to work on an archived file that requires additional clarification or action. Therefore, all users with permission for the WORKZ add-on can start manual processes. Use the "Acknowledgement and Approval" feature in the ecoDMS header to start single processes.

- In the list box, choose from all processes you created in the Settings.
- If you edit existing processes here, the changes will not affect the original, saved processes. The edits will only apply to the manual process that you execute.

1. Select the documents in ecoDMS
2. Select the "Acknowledgement & Approval" feature in the ecoDMS header
3. The add-on displays the DocID of the selected documents
4. **ecoWORKZ Process:** The list box lists all available processes.
    a) Choose an existing process.
        i. The fields populate with the template settings, which you can modify for this manual process.
    b) You can also make individual settings instead of using a template
        i. Refer to the following chapters of this manual for more information on how to configure acknowledgements 39.8 and approvals 39.9.

5. **End of Process Email Notification for Initiator:** As a creator of the acknowledgement, you can receive an automatic email message from ecoDMS after the processes is complete. To do so, your email address must be available in your user profile (also refer to chapter 6.2) Enable this feature.

6. Click "Share via WORKZ" to save the process, or click "Cancel" to abort the process.

   a) The Settings display to the respective users as available processes.

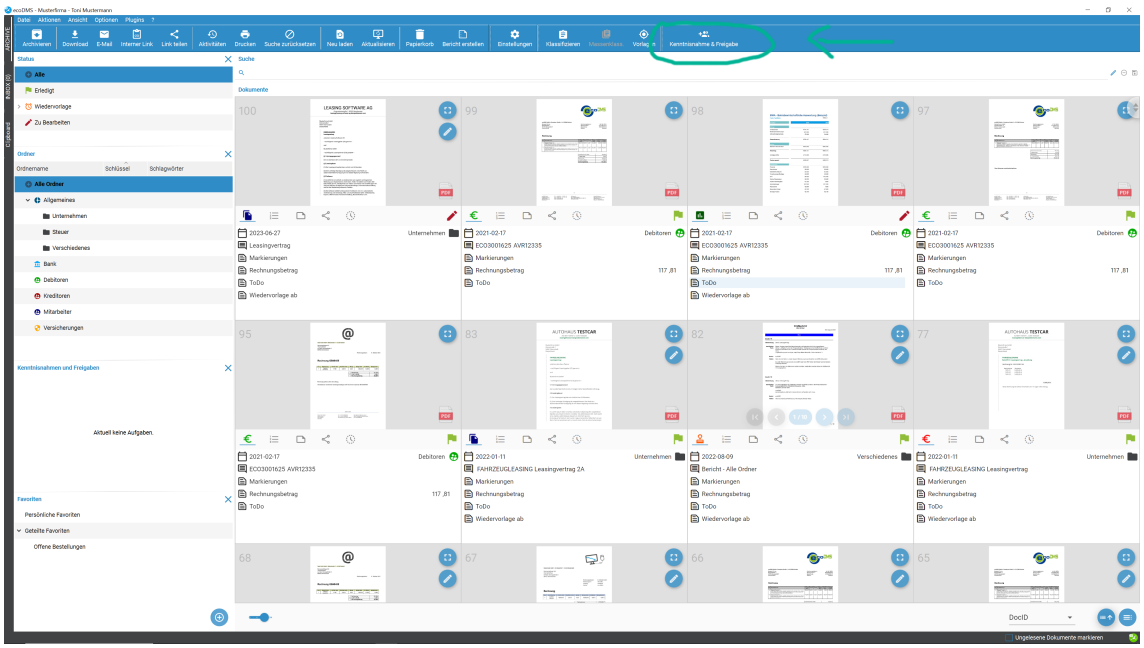


Figure 39.47: WORKZ Add-on - Trigger Manual Approval Process - Feature Button

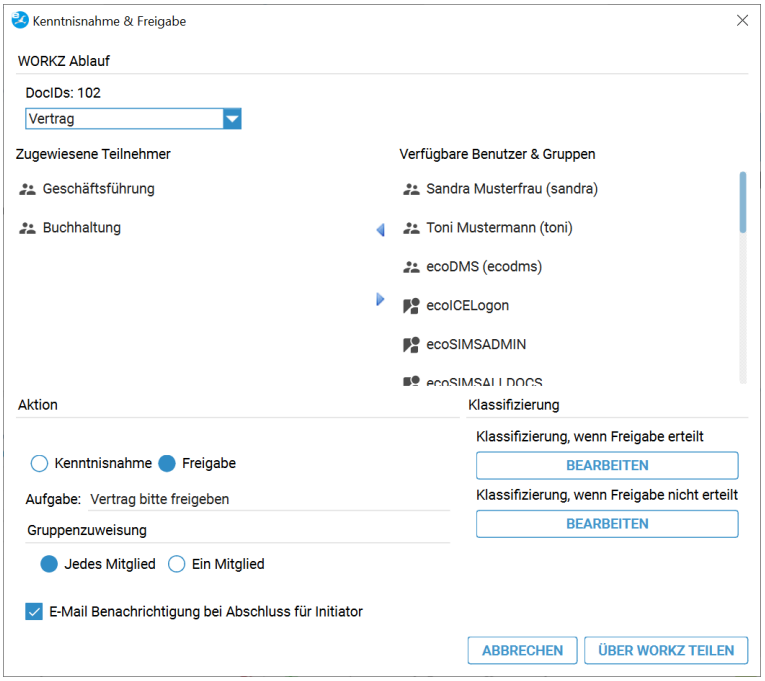


Figure 39.48: WORKZ Add-on - Create Manual Approval Process

39.10 Digital Stamp

- You can apply a stamp when approving or acknowledging a document.
- The document to be processed must be a PDF file which is approved for version management in ecoDMS.
- The PDF document must not be finalized in the ecoDMS version control.
- A document version must not be checked out or locked by another user (check-in/check-out), also see 17.8.
- 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).

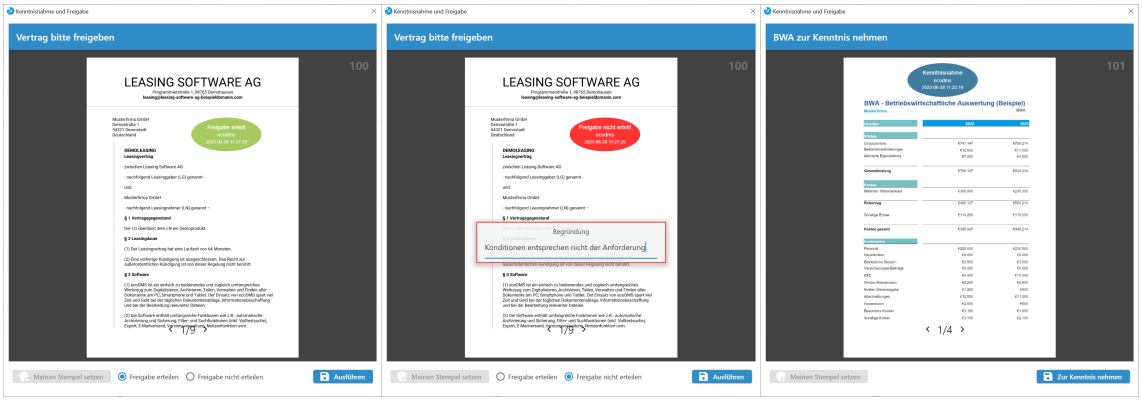


Figure 39.49: Stamp for Approvals and Acknowledgements

40 ecoDMS ScanApp

The ecoDMS ScanApp allows capturing documents using a smartphone camera and subsequently transferring them to the archive system ecoDMS. The captured documents are sent to the Inbox. From there, they can be reviewed, classified, and archived. Access to the Inbox is available via the web client or the desktop application. Further processing can therefore be performed either on the mobile device or on a PC.

40.1 Requirements for Using the ScanApp

To use the ScanApp, please observe the following points:

1. **Activate Web Service (see 7.10)**
    a) In the ecoDMS settings, the web service and remote access must be activated and configured.

    - Activation Note: If the remote access is grayed out, the web service must first be stopped in order to make the change.

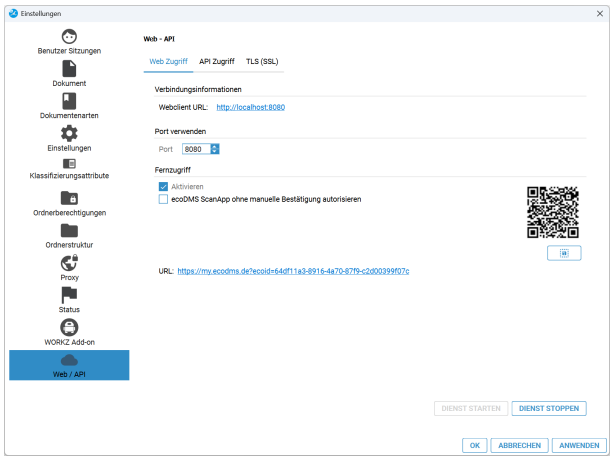


Figure 40.1: ecoDMS ScanApp - Settings - Web Service & Remote Access

2. **Assign User Rights (see 6.1.1)**
    a) For the respective user, the following system permissions must be activated:
        i. ...use the Inbox (also required so that the **Connect** button in the Connection Manager is displayed)

ii. ...use the web client and the ecoDMS ScanApp (also required so that the **Connect** button in the Connection Manager is displayed)

iii. *...archive and classify documents (so that the documents can be assigned and stored in the archive)*

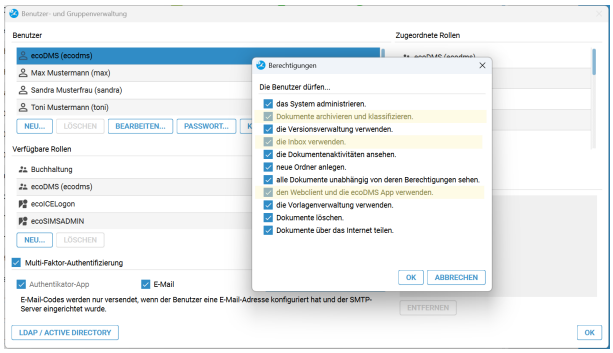


Figure 40.2: ecoDMS ScanApp - System Permissions

3. **Install ecoDMS ScanApp**
   a) Install the ecoDMS ScanApp on your smartphone (available in the respective store for iOS and Android).



Figure 40.3: ecoDMS ScanApp - Icon

4. **Connect App to ecoDMS (see 40.2)**
   a) Connect the app to ecoDMS by scanning the barcode from the Connection Manager.
5. **Manual Activation by Administrator (see 7.1.2)**
   a) If automatic authorization of mobile devices is not enabled, the device must now be manually approved by the administrator in order to use the functions of the document management system.

40.2 Connect ScanApp to ecoDMS

To send documents directly from your smartphone to ecoDMS, you must first pair the app with your document management system. Proceed as follows:

40.2.1 Step 1: Prepare Barcode on PC

1. Open the Connection Manager on your computer.
2. Select the desired connection profile.
3. Click the App Barcode button.
   a) Note: If the button is not visible, please check whether all requirements are met (see 40.1).
4. Enter the password for the assigned ecoDMS user.

5. The barcode for scanning will now be displayed.

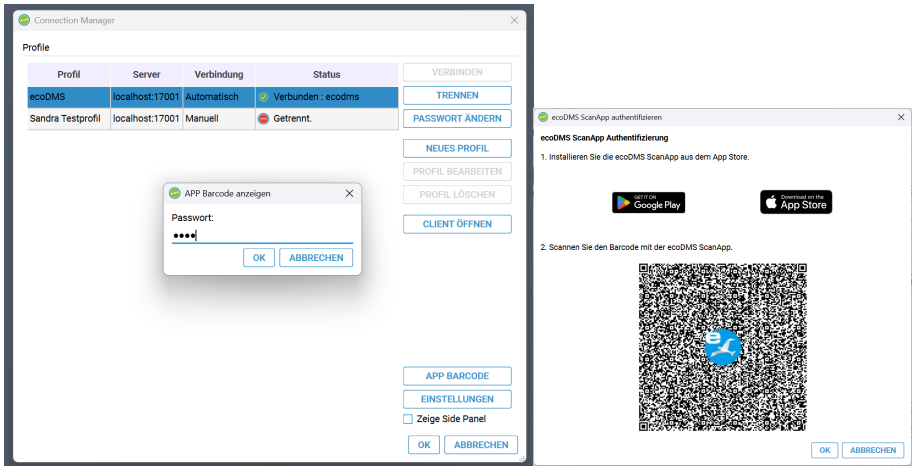


Figure 40.4: ecoDMS ScanApp - Connection Manager - App Barcode

40.2.2 Step 2: Establish Connection via Smartphone | Create Profile

The ecoDMS ScanApp allows you to set up multiple profiles. This is useful, for example, if you need to control different ecoDMS instances (servers) or use various user accounts on a single mobile device. Here is how it's done:

1. **Start App:** Open the ecoDMS ScanApp on your smartphone.
2. **Open Profile Menu:** Tap the user icon at the top of the screen (on initial installation, this will be a question mark icon).
3. **Add Profile:** Select the "Add Profile" option from the overview.
4. **Grant Permissions:** Confirm camera access. This is required for reading the connection code as well as for the scanning process itself.
5. **Scan Barcode:** Scan the barcode displayed in the Connection Manager on your PC monitor.
6. **Name Profile:** Assign a unique name to the profile to complete the setup.

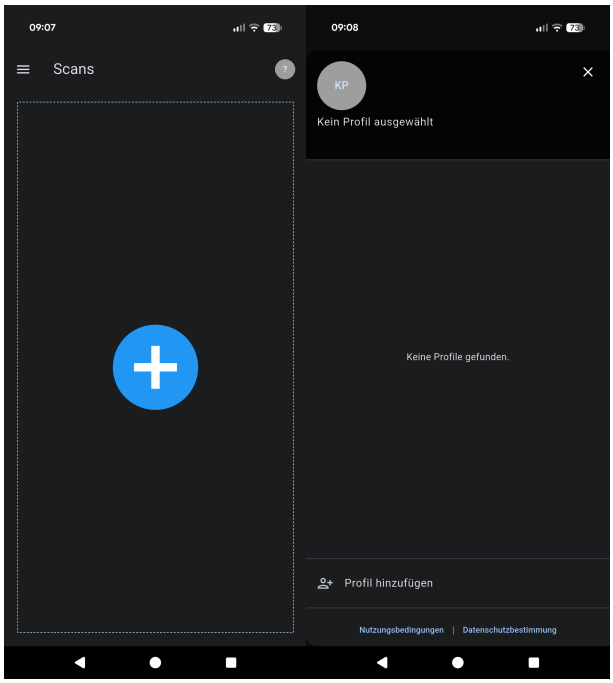


Figure 40.5: ecoDMS ScanApp - Connect With ecoDMS - Profile Overview (here: Android)

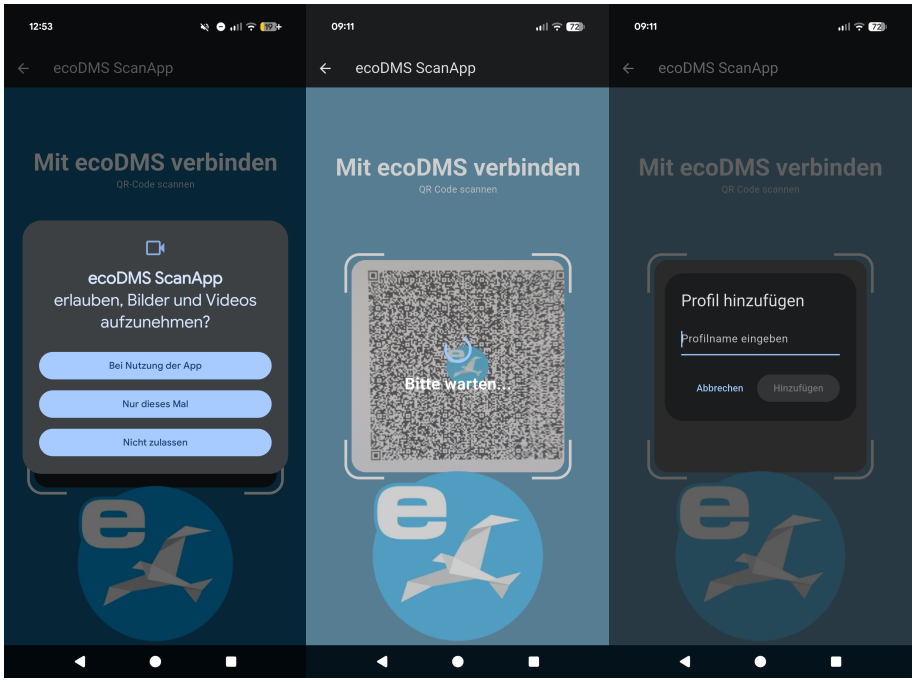


Figure 40.6: ecoDMS ScanApp - Connect With ecoDMS - Create New Profile (here: Android)

40.2.3 Step 3: Complete Login

1. **With Active MFA:** If multi-factor authentication is enabled for the ecoDMS user, enter the code on your smartphone.
2. **Device Authorization:** If your administrator has disabled automatic approval, the device must be manually authorized once by IT.

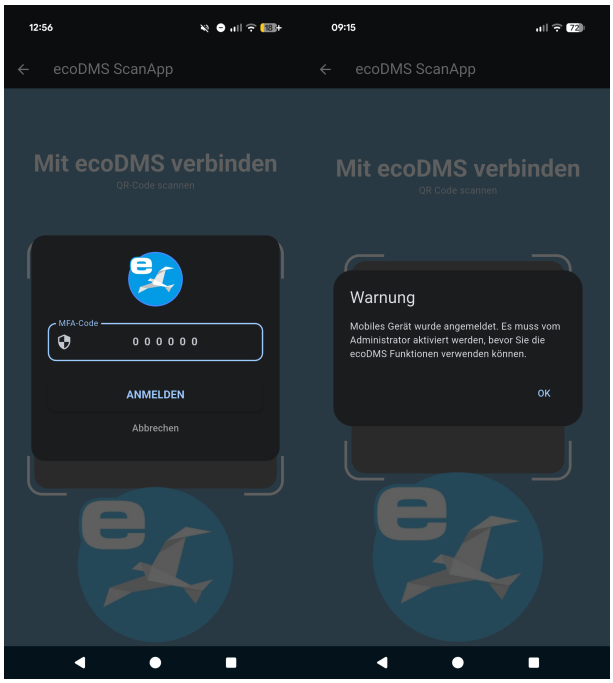


Figure 40.7: ecoDMS ScanApp - Complete Registration (In the App: MFA & Information)

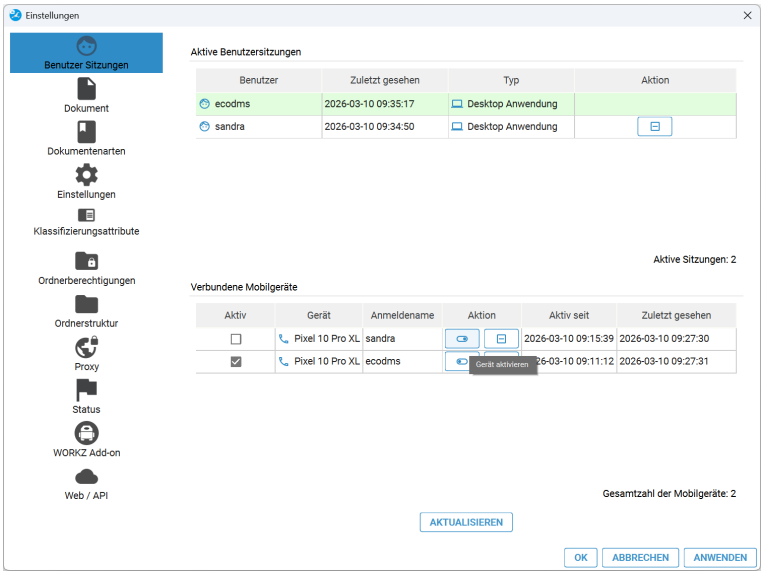


Figure 40.8: ecoDMS ScanApp - Complete Registration (In the Client: Administrator)

41 Login Credentials

This chapter contains information about the initial login credentials for ecoDMS.

41.1 Default User

The default user is created automatically when you first install ecoDMS. This user is allowed to...

- administer the system.
- archive and classify documents.
- use version control.
- use the inbox.
- view document activities.
- create new folders.
- use the web client and the ecoDMS ScanApp.
- use template management.
- erase documents.

The login credentials for the default user (if the password has not been changed) are:

- User name: ecodms
- Password: ecodms

For security reasons, this password should be changed immediately after login.

41.2 System Administrator

Besides the automatically generated user (default user) there is also a system administrator. This user is for system configuration only. The system administrator thus has the permission to make system settings and add more users. This user is not able to archive, view and/or classify documents.

- User name: ecoSIMSAdmin
- Password: ecoSIMSAdmin

For security reasons, this password should be changed immediately after login.

41.3 PostgreSQL Database

If the database was installed manually, the login credentials that was assigned during the installation of postgreSQL applies.

41.4 Scaninput Folder (Linux Distributions)

The Scaninput folder is a Samba share. When installing ecoDMS Server on a Linux distribution, a default user is created to do so. As an option, you can also enter any other user created in the Linux system. Use the following login credentials for the default user:

- User name: dmsscanner
- Password: dmsscanner