



ecoMAILZ (donnie) Build 1.0.8

Manual

Imprint**Software:** ecoMAILZ (donnie)**Build:** 1.0.8**Manual Date:** 22nd April 2025**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**

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1 Basics

ecoMAILZ fulfils all requirements for legally compliant Email archiving. The archiving system itself, however, constitutes only one component in this process. To work effectively with ecoMAILZ and avoid misconfiguration, the objectives and the resulting workflow need to be defined in advance and your Email systems must be prepared accordingly.

1.1 Adapters

The heart of ecoMAILZ is the integrated Email archive based on container storage technology, which ensures the long-term and revision-secure storage of all Email messages. The archive is populated via so-called adapters, which provide the interface to virtually all standard Email systems.

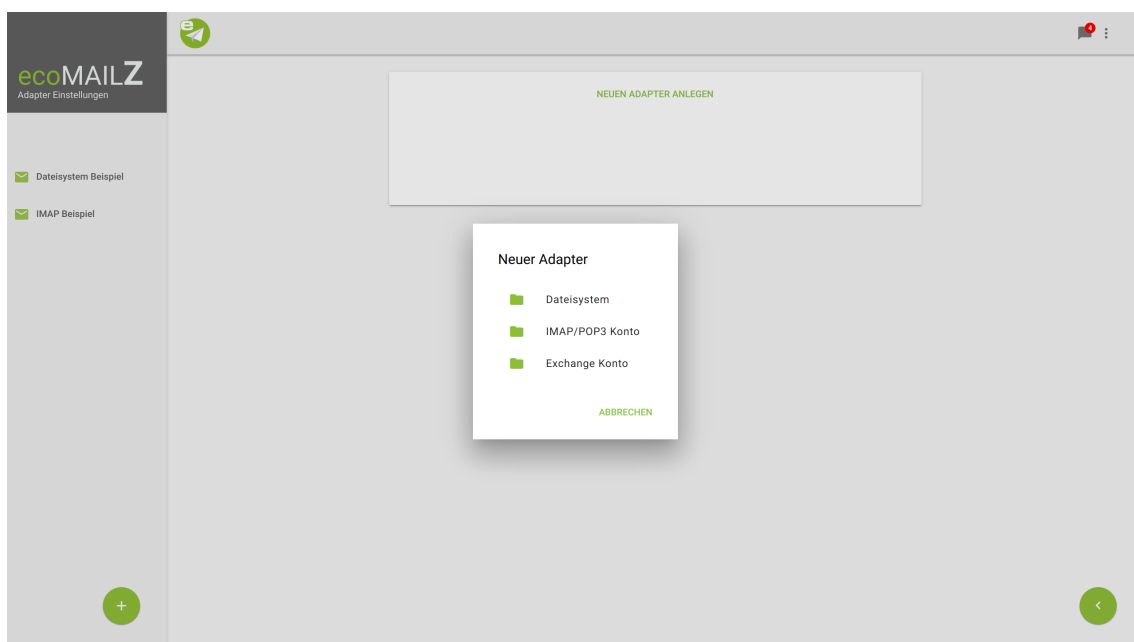


Figure 1.1: Adapter Settings - Overview

1.1.1 Configuration

There are several ways of configuring the adapters, depending on the type of Email system you want to integrate. The following scenarios describe practical applications:

1. Downloading from a so-called journal mailbox via a technical user

This mailbox contains copies of all incoming, outgoing and internal Emails from all users. Various Email sys-

tems offer the option of configuring a journal mailbox. To allow ecoMAILZ access to a journal mailbox, you must make the appropriate settings in your Email system.

The exact configuration depends on the system and may vary considerably from system to system. Please refer to the user manual of your Email application.

Once you have access to a journal mailbox, it is sufficient to configure one adapter as the source for the emails you want to import and archive in ecoMAILZ. This method is recommended and requires the lowest maintenance effort.

2. Downloading from individual mailboxes with the login credentials of the mailbox owner

For this option, the configuration of ecoMAILZ is not much different to that of an Email client used for downloading Emails on a daily basis. The disadvantage of this solution, however, is that you must configure a dedicated adapter for each mailbox you want to archive. This will significantly increase the maintenance effort. Once your Email system and your adapters are configured in ecoMAILZ, the adapters start archiving Emails.

1.1.2 Validation

ecoMAILZ validates every Email before saving it. Validation helps ecoMAILZ detect defective messages and react accordingly. ecoMAILZ executes the following validations:

- The message that is transferred to the system must be populated during validation.
- the email header must contain a sender, i.e. the value "From:".
- the email header must contain a valid date, i.e. the value "Date:" populated with a valid date.
- Depending on the email and the system, other general errors may occur during validation. This may lead to a message being classified as corrupt by ecoMAILZ.

1.1.2.1 File System

ecoMAILZ automatically renames Emails which are downloaded from the file system and cannot be archived.

- If it is an invalid Email file (validation error), the message receives the following suffix:

```
validationErr
```

- Other errors receive the suffix:

```
.err
```

1.1.2.2 IMAP / POP3 and Exchange

ecoMAILZ handles erroneous Emails, which are downloaded via IMAP, POP3 and Exchange and cannot be archived, as follows:

- If the validation of an Email returns an error, ecoMAILZ creates a new message to which the erroneous Email is attached.
- This Email generated by ecoMAILZ is then saved to the archive as follows:

```
Attachment-Name: SOURCE_MAIL.eml
From: errormail@ecomailz.de
To: errormail@ecomailz.de
Subject: ERRONEOUS MAIL <timestamp>
Contents: <Text of the validation error>
```

- If the erroneous Email is detected a second time, it is not archived again.

1.2 Review Deadline

The configurable review deadline ensures that all incoming Emails go through a two-step archiving process. During this process, Emails that should not be archived permanently are marked for deletion. Because Emails which are marked for deletion are only deleted after the review deadline has expired, this process can prevent the illegal deletion of Emails if the review deadline is long enough. There are many use cases which allow users, for example, to defer the decision about archiving or deleting a particular Email for up to a year (Review Deadline = 365 days), in order to ensure that no Email which must be stored in the archive is deleted by a user. In some cases, it may make sense to skip the review deadline immediately (Review Deadline = 0) and save the email to the final archive.

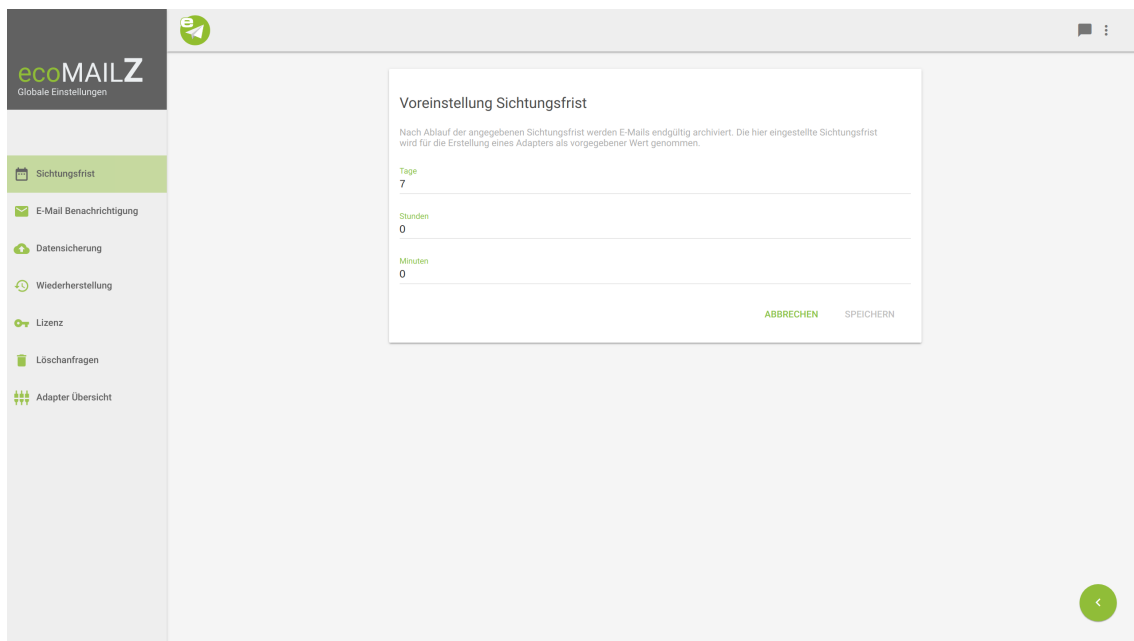


Figure 1.2: Global Settings - Review Deadline (Default)

1.3 Erasure Requests (Two-Man Rule)

ecoMAILZ is used for the long-term, legally compliant storage of Emails. Therefore, Emails cannot be erased after final archiving, i.e. following the end of the review deadline.

However, in individual cases messages need to be erased. An example for this is the General Data Protection Regulation (GDPR): A customer requests the erasure of his personal information. To carry out this request, ecoMAILZ has an "Erase" function which follows the "Two-Man Rule". Authorised users may send erase requests. Following the entry of a meaningful justification for the erasure, the request is forwarded accordingly. Users with the permission to reply to such requests can decide whether to erase the message or to retain the message in the archive.

When approving an erase request, the authorised user can enter a meaningful comment. Once this is saved, the actual content of the message is removed from the archive and is replaced with an erase flag. The erase flag contains the users involved in the erasure process as well as the justification and the date. This makes the erasure process transparent at any time.

If an erase request is refused, the authorised user can also enter a meaningful comment. Then the message is returned to its original final archiving status.

Treat the "Erase" function with utmost care. Erasing Emails should be executed confidentially and with due consideration. We recommend this function to be enabled only for users with managerial authority and who have the permission to view all Emails in ecoMAILZ.

From 2 users onwards, we strongly recommend the application of the two-man rule. The two-man rule ensures that a user cannot erase his or her own Emails from the archive. It ensures that important decisions cannot be made by an individual person and prevents critical actions from being undertaken by a single person. The aim is to reduce the risk of errors and abuse. In the case of erase requests, the two-man rule ensures that an erase request is not approved by the same person who made the request. The two-man rule is a default setting.

Please also refer to the notes on "Erase Requests" in the "User Management" chapter of this manual, where you will find more details about creating and responding to erase requests. This chapter also describes how erase requests can be processed when the staff member responsible for erase requests does not have read permissions.

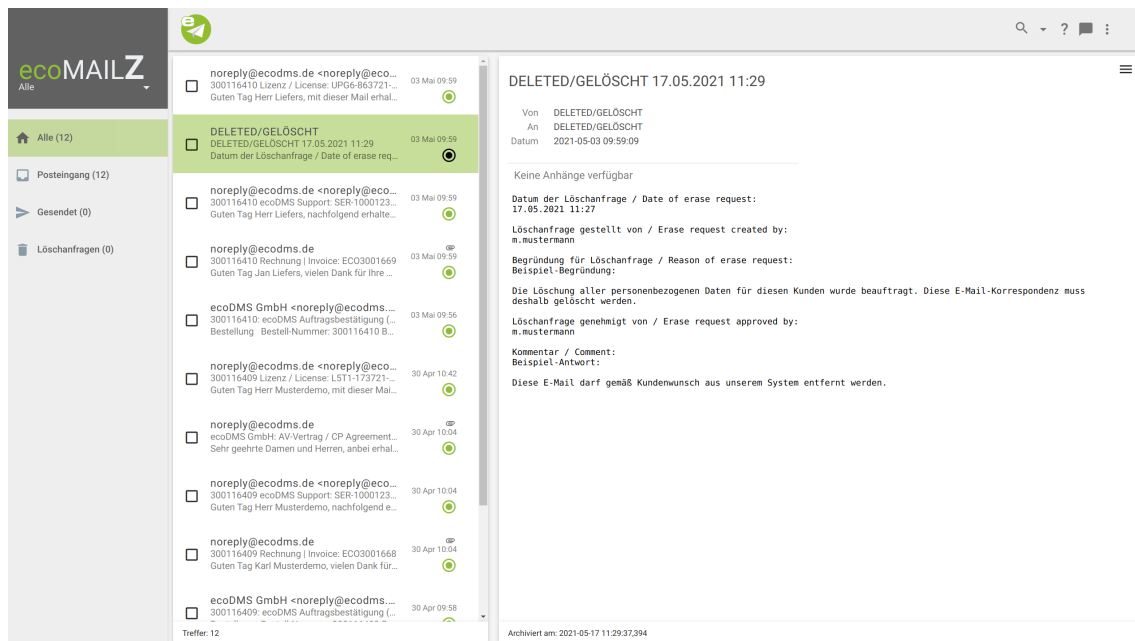


Figure 1.3: Erasure request - Approved - Status: black - Deletion flag

1.4 Status

To make the two-step archiving concept as simple as possible, ecoMAILZ assigns the applicable status to each message in form of a coloured "circle icon" in the email list. In combination with the configurable review deadline, you can use the status to manage the current Email archiving status. Click the status icon of a message to display status details.

1.4.1 Orange

Before a message is finally archived, the default status is "orange". This status indicates that the message is saved in the archive but can be deleted within the configured review deadline if necessary. Mouseover the orange status icon of a message to display the remaining review deadline. The default review deadline is set to 7 days if it has not been modified by the administrator.

1.4.2 Red

Users can exclude messages from final archiving by marking them for deletion. In this case the status changes from "orange" to "red". This status indicates that the message is temporarily saved in the archive but will be deleted after the configured review deadline has expired. Mouseover the red status icon of a message to display the remaining time until the message is finally deleted. During this period, you can also undo the deletion process with the "Undo Delete" function.

1.4.3 Green

Messages with a green status icon are irrevocably archived in ecoMAILZ. The review deadline for messages with this status has expired. Therefore, the message is irrevocably and securely archived in ecoMAILZ. The message cannot be deleted retrospectively.

1.4.4 Grey

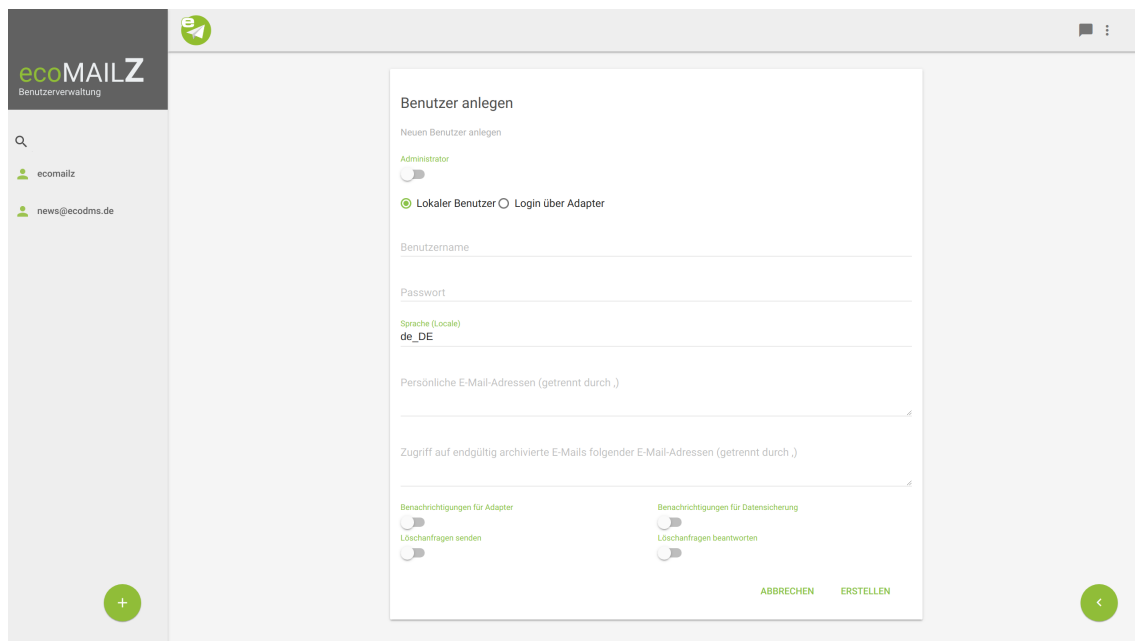
Messages with a grey status icon have received an erase request. In this case a user has requested an erasure. This function applies to Emails that have already been finally archived, have the "green" status and must be removed from the archive for relevant reasons. This function is only available to users with the permission to send erase requests.

1.4.5 Black

Messages with a black status icon were removed from the system. In this case an authorised user has approved the erase request. The actual Email content is replaced with an erase flag.

1.5 User Management

the emails in the archive constitute an Email pool. There is no direct association between a user and the emails within the archive. The association is made by configuring Email addresses for a specific user. This is an easy way for giving each ecoMAILZ user access to a subset of Emails from the archive. For example, you can configure that the user "j.doe" has the email address "j.doe@sample.net". This will give the user access to all Emails in ecoMAILZ, which were either sent to or from this address. This is an easy way of configuring which user has access to which Email addresses in the archive.



The screenshot displays the 'Benutzer anlegen' (Create New User) form in the ecoMAILZ interface. The form is titled 'Benutzer anlegen' and includes a subtitle 'Neuen Benutzer anlegen'. It features several input fields and checkboxes:

- Administrator:** A checkbox that is currently unchecked.
- Lokaler Benutzer / Login über Adapter:** Radio buttons where 'Lokaler Benutzer' is selected.
- Benutzername:** An empty text input field.
- Passwort:** An empty text input field.
- Sprache (Locale):** A dropdown menu with 'de_DE' selected.
- Persönliche E-Mail-Adressen (getrennt durch ,):** An empty text input field.
- Zugriff auf endgültig archivierte E-Mails folgender E-Mail-Adressen (getrennt durch ,):** An empty text input field.
- Benachrichtigungen für Adapter:** A checkbox that is currently unchecked.
- Benachrichtigungen für Datensicherung:** A checkbox that is currently unchecked.
- Löschanfragen senden:** A checkbox that is currently unchecked.
- Löschanfragen beantworten:** A checkbox that is currently unchecked.

At the bottom right of the form, there are two buttons: 'ABBRECHEN' (Cancel) and 'ERSTELLEN' (Create).

Figure 1.4: User Management - Create New User (Empty)

1.6 Language (German / English)

ecoMAILZ can be installed and used in German and in English.

- The installation language depends on the language settings configured in your operating system. The installer automatically recognizes these settings.
- The language of the Webclient and the login window initially depends on the language selected in your web browser.
 - Please refer to the browser manual for your browser for more information on language settings.
- The language (Locale) of the Webclient can be configured individually for each user in either German (de_DE) or English (en_US). Please refer to the chapter "User Management".

2 Login and Logoff

To work with ecoMAILZ, you must login to the ecoMAILZ Webclient with your login credentials.

2.1 Login

If this is your first login after a new ecoMAILZ installation, you can find the login credentials of the default user in the chapter "Login Credentials" of this manual.

Start your web browser and enter the link to the ecoMAILZ login page.

You can open the login page at the following web address:

```
http://ecoMAILZ_IP_ADRESS:Port
```

Example for a local installation with default port:

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

1. **Username:** Enter your username.
2. **Password:** Enter the password associated with the username.
3. **Login:** Click the Login button to start ecoMAILZ.

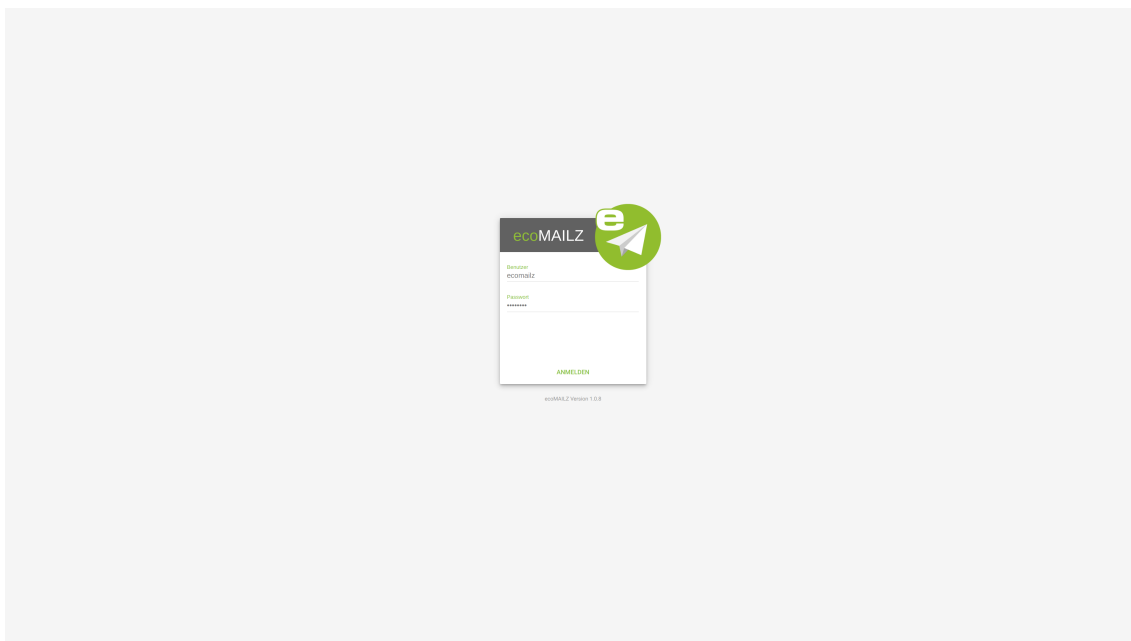


Figure 2.1: ecoMAILZ Webclient: Login Page

2.2 Logoff

To logoff from the system, complete the following steps:

1. Click the menu icon at the top right in the ecoMAILZ Webclient.
2. Select the "Logoff" menu item.
3. Your user is now logged off and you will return to the ecoMAILZ login page.

2.3 Timeout

If you are not using ecoMAILZ for a longer period of time, you are automatically logged off.

- The system times out after 3600 seconds of inactivity.
- You are redirected to the ecoMAILZ login page where you can log in again with your credentials.

3 Global Settings

There are various functions for the general setup of ecoMAILZ and for exporting, backing up and restoring data.

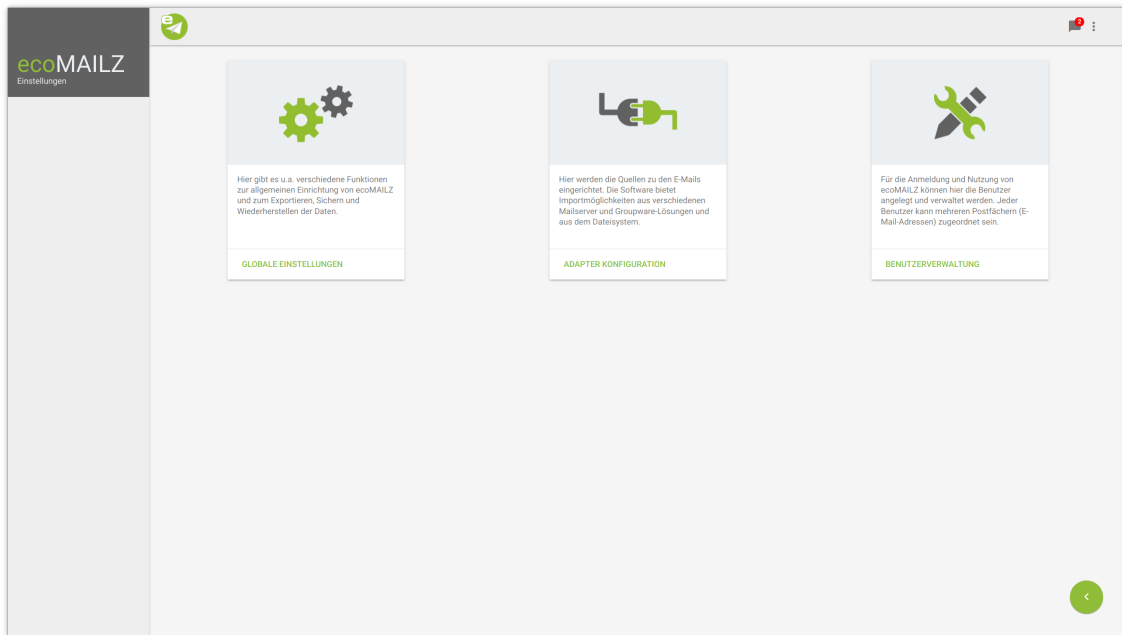


Figure 3.1: Einstellungen - Hauptmenü

3.1 Review Deadline (Default)

- You can also specify the review deadline individually for each adapter in ecoMAILZ.
 - The specified review deadline is set as default when creating adapters.
- As soon as an Email is finally archived, the process cannot be undone.
- Please also refer to the sections "Review Deadline" and "Status" in the "Basics" chapter.

To fulfil the requirements for Email archiving while at the same time excluding Emails from the archive that are not subject to archiving requirements, ecoMAILZ works with a two-step archiving concept. You can specify a review deadline to exclude Emails from archiving during that period. The default review deadline is set to 7 days if it has not been modified by the administrator. After the configurable review deadline has expired, emails are finally archived. ecoMAILZ uses the review deadline you set here as the default value for creating an adapter.

To configure the default review deadline, complete the following steps:

1. Click the menu icon at the top right in the ecoMAILZ Webclient.
2. Select the "Settings" menu item.
3. Select the "Global Settings" menu item in the overview.
4. Select the "Review Deadline" menu item.
5. In the "Review Deadline" window, enter the period for the deadline. These are numeric fields (all fields set to 0 = archive Emails immediately and irrevocably).
 - a) **Days:** Enter an integer for the number of days until final archiving.
 - i. Possible values: 0-365
 - b) **Hours:** Enter an integer for the number of hours until final archiving.
 - i. Possible values: 0-23
 - c) **Minutes:** Enter an integer for the number of minutes until final archiving.
 - i. Possible values: 0-59
6. Save your settings by clicking "Save" or abort the process with "Cancel".
7. Click "Cancel" to exit the "Global Settings".
8. To close the Settings dialogue box, click the green "Return" icon at the bottom right.

The screenshot shows the 'ecoMAILZ' web client interface. On the left is a sidebar with a menu containing: 'Sichtschaftsfrist' (highlighted), 'E-Mail Benachrichtigung', 'Datensicherung', 'Wiederherstellung', 'Lizenz', 'Löschanfragen', and 'Adapter Übersicht'. The main area displays a dialog box titled 'Voreinstellung Sichtschaftsfrist'. Inside the dialog, there is explanatory text: 'Nach Ablauf der angegebenen Sichtschaftsfrist werden E-Mails endgültig archiviert. Die hier eingestellte Sichtschaftsfrist wird für die Erstellung eines Adapters als vorgegebener Wert genommen.' Below this text are three input fields: 'Tage' with the value '7', 'Stunden' with the value '0', and 'Minuten' with the value '0'. At the bottom right of the dialog are two buttons: 'ABBRECHEN' and 'SPEICHERN'. A green circular button with a left-pointing arrow is located at the bottom right of the main window, outside the dialog box.

Figure 3.2: Global Settings - Default Review Deadline

3.2 Email Notification

ecoMAILZ can be configured to send Email notifications. To send Email notifications, you must first make the necessary SMTP settings. Enter the SMTP settings of your outgoing mail server, and give the sender of system messages a name.

1. **Server address:** Enter the address of your mail server. This can, for example, be an IP address or a server name, depending on your mail server configuration.
2. **Server port:** Enter the server port for the outbox of your mail server.
3. **Protocol:** Select the appropriate protocol of your mail server. ecoMAILZ supports the following protocols and displays them for selection:
 - a) SSL/TLS
 - b) STARTTLS
 - c) None

For IMAP (SSL/TLS) and IMAP (STARTTLS), ecoMAILZ supports TLSv1, TLSv1.1 and TLSv1.2.

4. **Username:** Enter the username.
5. **Password:** Enter the password associated with the username.
6. **Sender address:** Enter the email address of the sender of system notifications.
7. **Check settings:** Click the "Check Settings" button to let the system check the mail server configurations. ecoMAILZ checks your entries and displays any error messages in a dialogue box.
8. If your entry and check are successful, you can save the settings. To do so, click "Save".
9. To close the Settings dialogue box, click the green "Return" icon at the bottom right.

The screenshot shows the 'E-Mail Benachrichtigung' (E-Mail Notification) settings dialog in the ecoMAILZ application. The dialog is titled 'E-Mail Benachrichtigung' and contains the following fields and options:

- Serveradresse:** 192.168.1.2
- Serverport:** 1234
- Protokoll:** SSL/TLS
- Zertifikatsfehler ignorieren:** (checked)
- Benutzername:** m.mustermann
- Kennwort:** (masked with dots)
- Sendeadresse:** m.mustermann@testmaildomainbeispiel.de

At the bottom of the dialog, there are three buttons: 'ABBRECHEN' (Close), 'SPEICHERN' (Save), and 'EINSTELLUNGEN PRÜFEN' (Check Settings). A green circular button with a left arrow is located at the bottom right of the dialog.

Figure 3.3: Global Settings - E-Mail Notifications (Example)

3.3 Data Backup

- If you are running ecoMAILZ on a NAS, please refer to the information on the mount path for the backup functions in the installation manual!
- Only a user with administrator permissions in ecoMAILZ can create a data backup.
- During a data backup no other users should be connected and/or working with the system.
- Active adapters are automatically stopped during a backup and then restarted following the backup.
- We recommend a daily data backup.
- The data backup should be stored on an external data carrier.
- The size and the duration of the backup depend on the amount of data / file size. Depending on the data volume this operation may take a while.
- Before performing a data backup (manually and automatically), make sure that at least 1.5 times the size of the data folder is available in free space on the ecoMAILZ data path drive and also on the target drive for the backup.
- The archived emails are securely encrypted and stored in containers.
 - The default data volume of such a container is 500 MB. This is a fixed value in ecoMAILZ.
 - As soon as the data volume is reached, the system automatically creates a new container.
- In the Settings dialogue box, you can configure automated, time-controlled data backups.
 - For example, you can make a full backup of all containers.
 - Alternatively, you can also create an incremental data backup.
 - * In this case ecoMAILZ completes the existing backup with the latest changes in the selected intervals.
 - * *Please use the incremental backup in ecoMAILZ only if you additionally back up the backup files with a third party software.*

To make the settings for an automatic backup, complete the following steps:

1. Click the menu icon at the top right in the ecoMAILZ Webclient.
2. Select the "Settings" menu item.
3. Select the "Global Settings" menu item in the overview.
4. Select the "Data Backup" menu item and make the required settings in the "Data Backup" window.
5. **Backup disabled / enabled (switch):** Enable the automatic backup function by clicking the "Switch" (green = enabled).
6. **Destination folder:** Select the target path for saving backups. ecoMAILZ saves the backups you create in the selected folder. The ecoMAILZ server provides the local data carriers for storing backups.
7. 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, ecoMAILZ executes a backup of all containers at the specified time.
- The backup file is saved in the selected folder as a ZIP file.
 - The duration of the data backup depends on the data volume of the archived Emails.
 - This type of data backup may be relatively time-consuming because ecoMAILZ makes a full backup of all containers.
- b) **Incremental backup:** If you enable the incremental backup, ecoMAILZ executes the data backup step-by-step. In this case ecoMAILZ completes the existing backup with the latest changes in the selected intervals.

- ***Please use the incremental backup in ecoMAILZ only if you additionally back up the backup files with a third party software.***
- The incremental backup only saves the data that was changed or added since the last backup.
- If you execute the incremental backup, ecoMAILZ creates three files/folders plus subfolders in the target folder of the backup:
 - data, hsqldb, version.info
 - These files/folders are extended during the next incremental backup and must therefore not be moved, renamed or deleted.
- The backup file is saved in the selected folder as an unzipped folder.
- To restore this incremental backup again,
 - select these files/folders
 - and create a ZIP file via the context menu.
- You can use this ZIP file to restore the entire ecoMAILZ.
- The duration of the data backup depends on the size of the archived files and the information.
- The first execution of the incremental backup may take longer because ecoMAILZ makes a full backup of all available containers.
 - ecoMAILZ then adds the latest changes and new data to the existing backup in the specified rhythm.

8. Select the intervals for your data backup.

- a) **Daily:** Enable this setting to execute the backup process every day at the same time.
- Time: Enter the time at which you want ecoMAILZ to back up the data.
- b) **Weekly:** Enable this setting to execute the backup process every week on the same day and at the same time.
- Weekday: Select the weekday.
 - Time: Enter the time at which you want ecoMAILZ to back up the data.
- c) **Monthly:** Enable this setting to execute the backup process every month on the same day and at the same time.
- Day: Select the day of the month.

ii. Time: Enter the time at which you want ecoMAILZ to back up the data.

9. **Email notification for failed backups**: The system has the option to send notification Emails containing errors and status of automatic backups (manual backups are excluded from Email notifications). Sending Email notifications requires prior configuration of the outgoing mail server via the "Email Notification" menu item. Then enable "Email notifications for failed backups" and make the necessary settings.

a) **Email notification for successful backups**: If required, the system will notify you via Email of the status after every backup, regardless of whether the backup was successful or not. To activate this Email notification, also enable "Email notifications for successful backups".

```
backup-user01@samplomain.com
```

b) **Email recipients (separate multiple recipients with a semicolon ";")**: Enter the email address(es) of one or more recipients. Separate multiple recipients with a semicolon ";".

```
backup-user01@samplomain.com; backup-user01@samplomain.com
```

10. Save your settings by clicking "Save" or abort the process with "Cancel".

11. **Create backup now**: Click "Create Backup" to immediately start the configured backup (full or incremental backup) after saving, regardless of the set interval.

12. Click "Cancel" to exit the "Global Settings". 13. To close the Settings dialogue box, click the green "Return" icon at the bottom right.

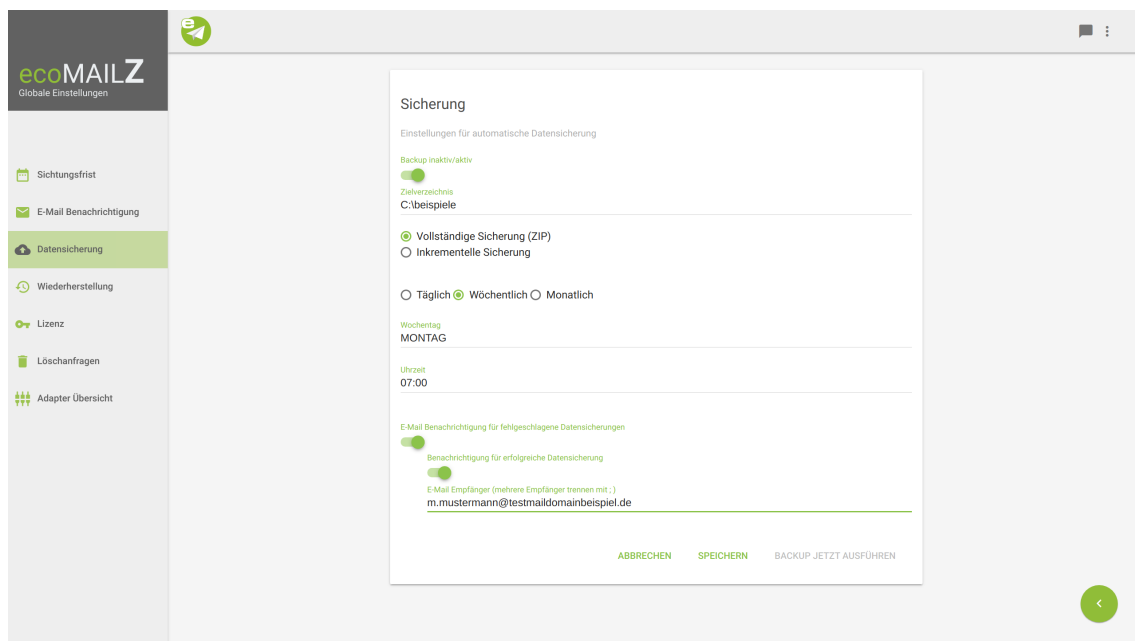


Figure 3.4: Global Settings - Incremental Backup with Email Notification (here: Weekly, Mondays, 07:00 am)

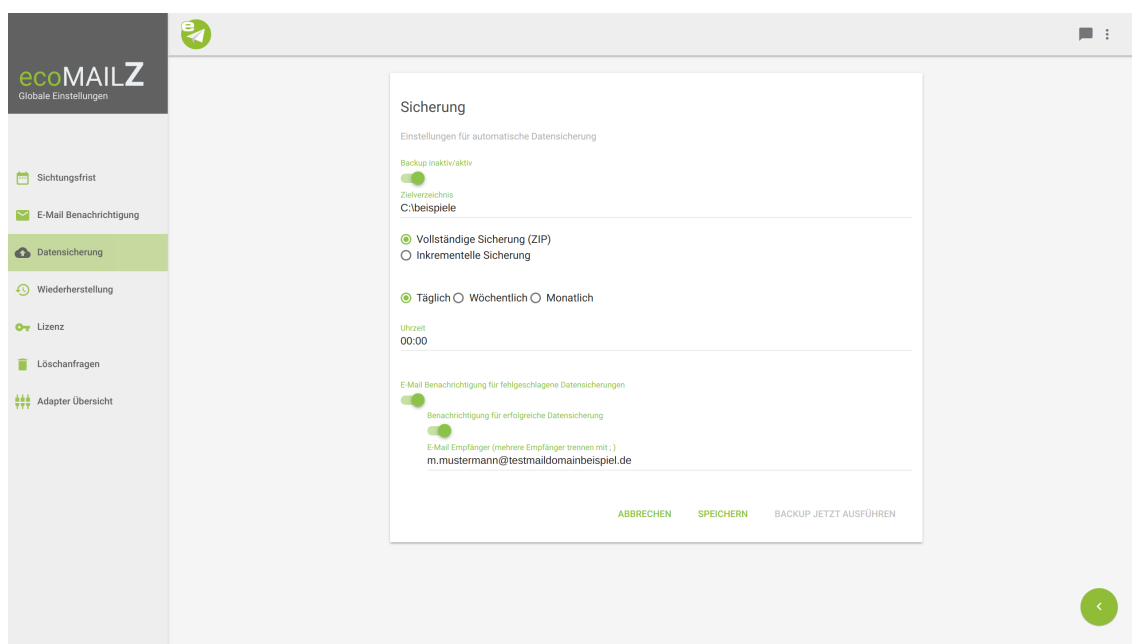


Figure 3.5: Global Settings - Incremental Backup with Email Notification (here: Every Day, 00:00)

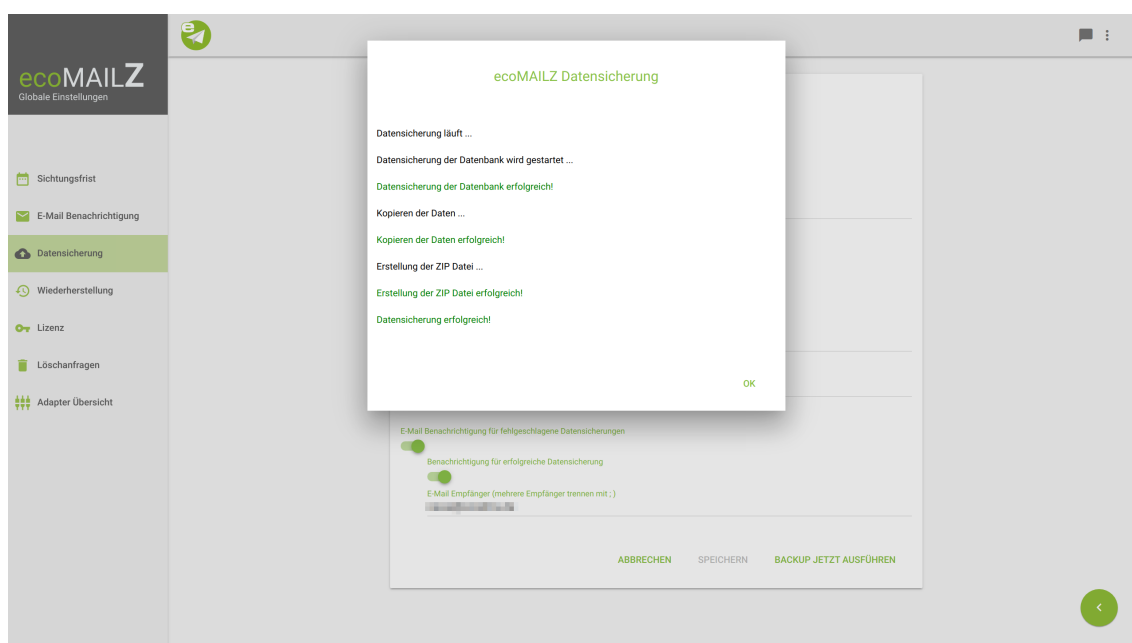


Figure 3.6: Global Settings - Dialogue Box for Immediate Backup (Manual Backup)

3.4 Restore (Data Recovery)

1. Only a user with administrator permissions in ecoMAILZ can restore data.
 - a) Users without administrator permissions cannot see the "Settings" menu item.
2. During a data recovery, no other users should be connected and/or working with the system.
3. When the data backup is imported, the existing data store is deleted irrevocably.
4. Active adapters are automatically stopped during data recovery and then restarted following the recovery.
5. 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.

The following contains important information about data recovery and how to restore your data.

1. Click the menu icon at the top right in the ecoMAILZ Webclient.
2. Select the "Settings" menu item.
3. Select the "Global Settings" menu item in the overview.
4. Select the "Restore" menu item and make the required settings in the "Restore" window. .
5. **Select Data Backup:** Select the ZIP file with the data backup.
 - a) 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:
 - i. data, hsqldb, version.info
 - A. Select these files/folders
 - B. and create a ZIP file via the context menu.
 - b) 2. This ZIP file can then be used for the recovery process.
6. Click "Restore" to start the recovery process.
 - a) The duration of the recovery process depends on the data volume and your system environment. Depending on the size, the recovery may take a while.
7. Click "Cancel" to exit the "Global Settings" area.
8. To close the Settings dialogue box, click the green "Return" icon at the bottom right.

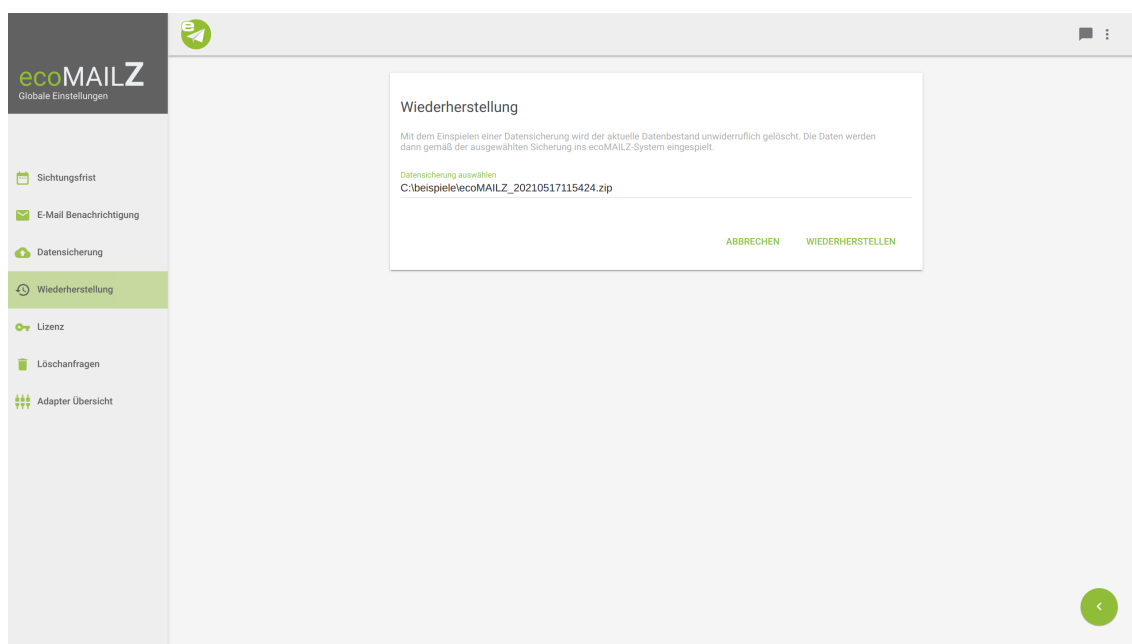


Figure 3.7: Global Settings - Data Recovery (Restore)

3.5 License

The administrator activates and manages the purchased ecoMAILZ license on the Settings page in the ecoMAILZ Webclient. In the "License" area, you can display and manage your license information.

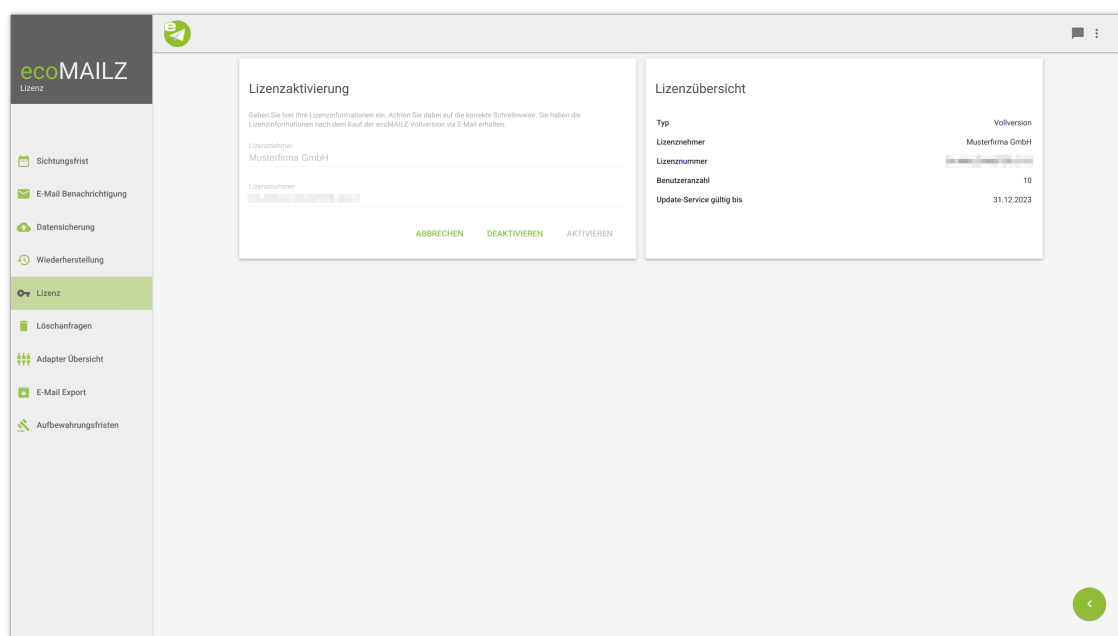


Figure 3.8: Global Settings - License Activation (Full Version)

3.5.1 Activate License

To activate the full version of ecoMAILZ, you require a license. You can purchase it in the online shop at www.ecodms.de. Then you can activate your ecoMAILZ license as follows:

1. Click the menu icon at the top right in the ecoMAILZ Webclient.
2. Select the "Settings" menu item.
3. Select the "Global Settings" menu item in the overview.
4. Select the "License" menu item.
5. Enter your license information in the "License Activation" window. Please make sure the spelling is correct. You received the license information via Email after purchasing the ecoMAILZ full version.
 - a) **Licensee:** Enter the name of the licensee. Please make sure the spelling is correct. You can find the name of the license holder in the email you received after purchasing your license(s).
 - b) **License number:** Enter the license number. Please make sure the spelling is correct. You can find the name of the license number in the email you received after purchasing your license(s).
6. Click "Activate".
7. The license is checked and activated. This operation may take a while.

Please note that your computer requires a stable internet connection to activate the license. The license is compared with the ecoMAILZ license server and activated accordingly.

8. In the "License Overview" window you can find out more about your license information and the associated update period.

For more details about the licensing model and its validity, refer to www.ecomailz.de.

9. To close the Settings dialogue box, click the green "Return" icon at the bottom right

3.5.2 Deactivate License

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

To deactivate your license, complete the following steps:

1. Click the menu icon at the top right in the ecoMAILZ Webclient.

2. Select the "Settings" menu item.
3. Select the "Global Settings" menu item in the overview.
4. Select the "License" menu item.
5. Click "Deactivate" in the "License Activation" window.
6. The license is checked and deactivated. This operation may take a while.

- Please note that your computer requires a stable internet connection to deactivate the license. The license is compared with the ecoMAILZ license server and deactivated accordingly.

7. In the "License Overview" window, you can now see the details of the demo version.

- Please note that you may only use the demo version for test purposes.
- You can archive a maximum of 3000 Emails with the demo version.

8. To close the Settings dialogue box, click the green "Return" icon at the bottom right.

3.6 Erasure Requests

Configure the email erasure process and the erasure logs.

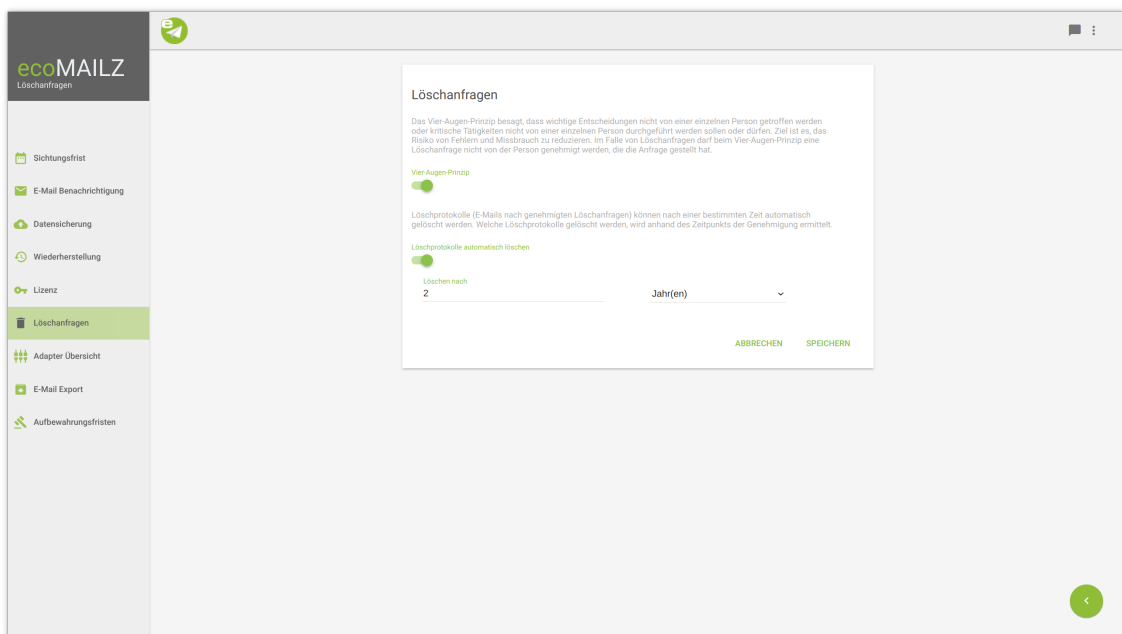


Figure 3.9: Global Settings - Erasure Requests

3.6.1 Two-man Rule

The two-man rule ensures that important decisions cannot be made by an individual person and prevents critical actions from being undertaken by a single person. The aim is to reduce the risk of errors and abuse. In the case of erase requests, the two-man rule ensures that an erase request is not approved by the same person who made the request.

To enable the two-man rule, proceed as follows:

1. Click the menu icon at the top right in the ecoMAILZ Webclient.
2. Select the "Settings" menu item.
3. Select the "Global Settings" menu item in the overview.
4. Select the "Erasure Requests" menu item.
5. **Two-Man Rule (Switch):** Enable the "switch" if you want to enable the two-man rule (green = enabled).
6. If your entry and check are successful, you can save the settings. To do so, click "Save".
7. To close the Settings dialogue box, click the green "Return" icon at the bottom right.

3.6.2 Automatically Delete Erasure Logs

You can configure the automatic deletion of erasure logs (emails following approved erase requests) after a specified time. The logs for deletion are determined by the time of approval. To automatically delete erasure logs, complete the following steps:

1. Click the menu icon at the top right in ecoMAILZ Webclient.
2. Select the "Settings" menu item.
3. Select the "Global Settings" menu item in the overview.
4. Select the "Erase Request" menu item.
5. **Automatically delete erasure logs:** Click the "switch" (green = enabled) to enable automatic deletion.
 - a) **Delete after** (numeric field): Enter the number of years or days after which the system deletes the logs

– If you enter the value "0", the logs are deleted on the day of approval.

b) **Year(s) | Day(s):** Select the unit

6. Click "Save" or abort the process with "Cancel".
7. To close the Settings dialogue box, click the green "Return" icon at the bottom right.

3.7 Adapters Overview

This is an overview of all running adapters and the data that are currently being processed. This view automatically refreshes every 5 seconds. To go to the overview, complete the following steps:

1. Click the menu icon at the top right in ecoMAILZ Webclient.
2. Select the "Settings" menu item.
3. Select the "Global Settings" menu item in the overview.
4. Select the "Adapter Overview" menu item.
5. To close the Settings dialogue box, click the green "Return" icon at the bottom right.

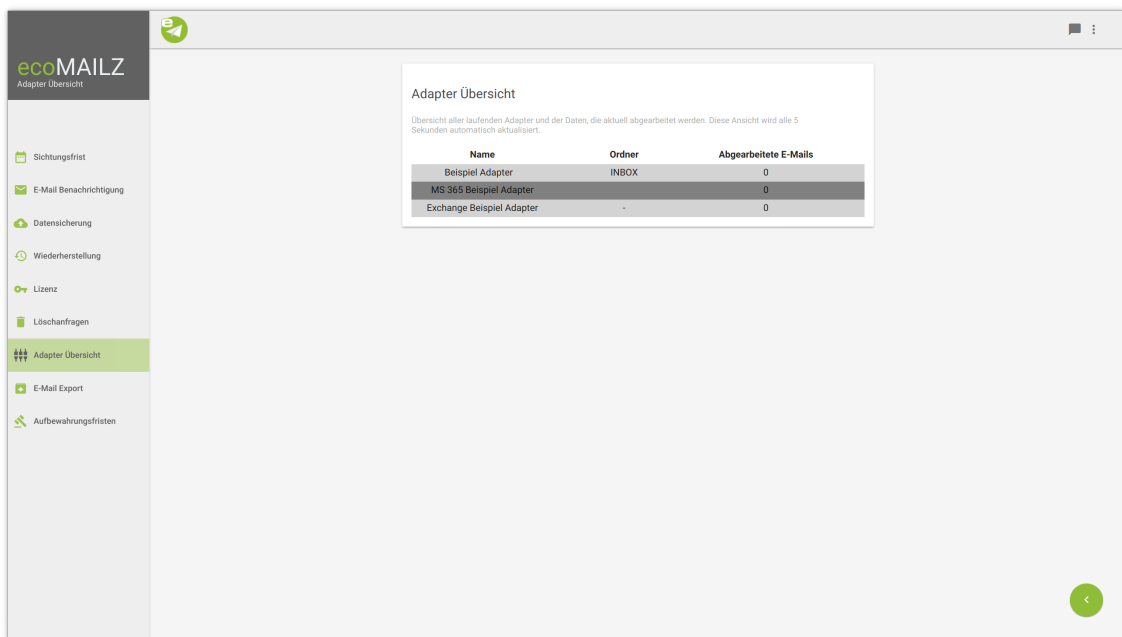


Figure 3.10: Global Settings - Adapter Overview

3.8 Email Export

- The emails are exported as .eml from the containers
- The export process exports all emails from the archive
- The export is divided into: temp + permanent archive
- The file name contains the timestamp (YYMMDDHH:MM, e.g. 202108101253 -> 10.08.2021 12:53 hrs) and the email ID
- **If you are running ecoMAILZ on a NAS, please refer to the information on the mount path for the export in the installation manual!**

This feature exports all archived emails to the selected folder in .eml format. To export all archived emails, complete the following steps:

1. Click the menu icon at the top right in ecoMAILZ Webclient.
2. Select the "Settings" menu item.
3. Select the "Email Export" menu item in the overview.
4. Destination folder: Select the destination folder. All accessible folders of the ecoMAILZ installation environment's operating system are displayed.
5. Export: Click "Export" to start exporting. This process may take a while depending on the data volume.

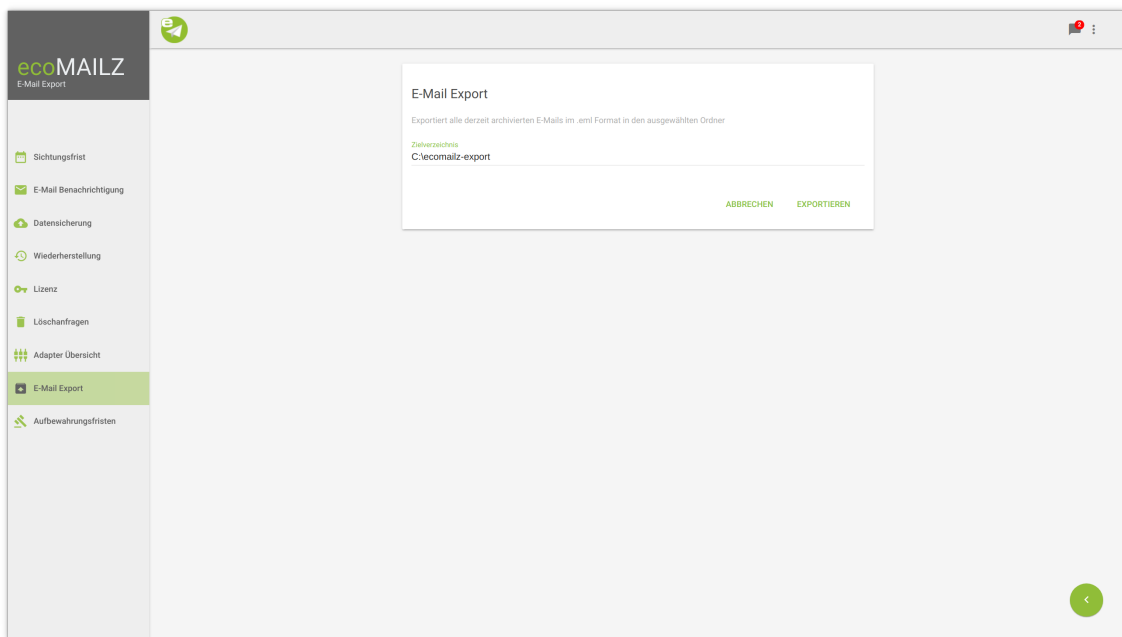


Figure 3.11: Email Export

3.9 Retention Periods

Users can configure email retention periods in ecoMAILZ. After a retention period has expired, the system either automatically erases the emails or the user (with the permission to answer erase requests) erases them manually.

- **For more information on this topic, refer to chapter 7.7 in this manual.**
- Use search terms to assign emails to a retention period. You can use the parameters of the full-text search to assign the search terms (refer to the chapter Search & Filter -> Examples full-text search).
- **Erase automatically enabled: Finally archived emails that match the criteria of a retention period are automatically erased after the specified period and cannot be restored.**
- **Erase manually: Finally archived emails that match the criteria of a retention period can be erased manually after the specified period and cannot be restored.**
- If users can answer erase requests regardless of permissions, ecoMAILZ displays all emails for erasure.
- There is no guarantee that emails, whose retention period expired before it was modified or deleted, have not already been erased.
- The retention periods are sorted by priority. The top one in the list has the highest priority. Disabled retention periods are ignored. If you have created several retention periods, sort them by priority. In the email details, the first deadline is highlighted in red.
- If more than one deadline applies to an email, the deadline with the higher priority will be considered first.
- Running email erasure processes ignore edits to retention periods. Any edits are applied in the following run.
- In ecoMAILZ, users have customised quick filters for displaying emails and their retention periods.
- The detected retention periods are also displayed in form of a chip in the email details. This means that the retention period is also visible in the email. In addition to the name of the retention period, the chips also indicate whether the email should be manually or automatically erased from the system after the retention period has expired.



Figure 3.12: Set Retention Periods - Keyword Examples

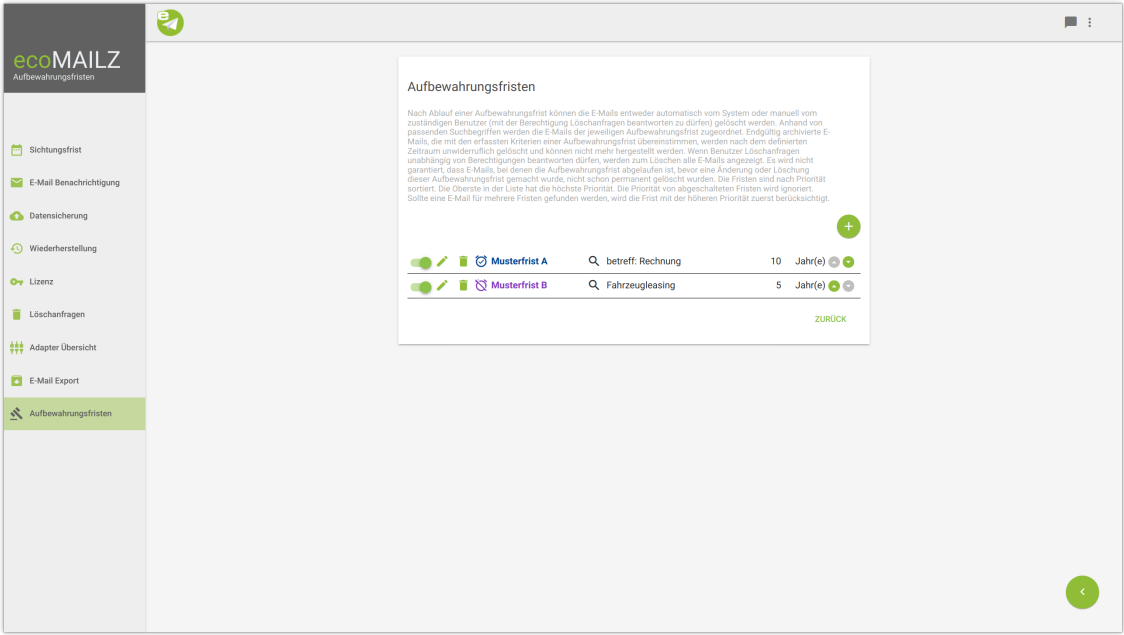


Figure 3.13: Set Retention Periods - Example Overview

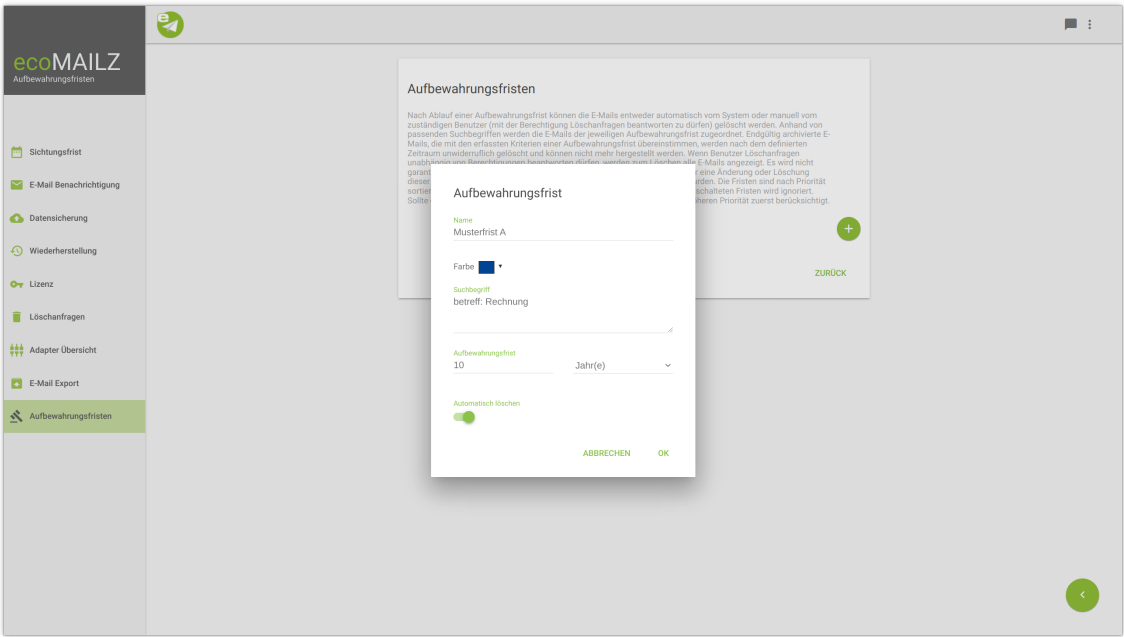


Figure 3.14: Set Retention Periods - Automatic Erasure Example

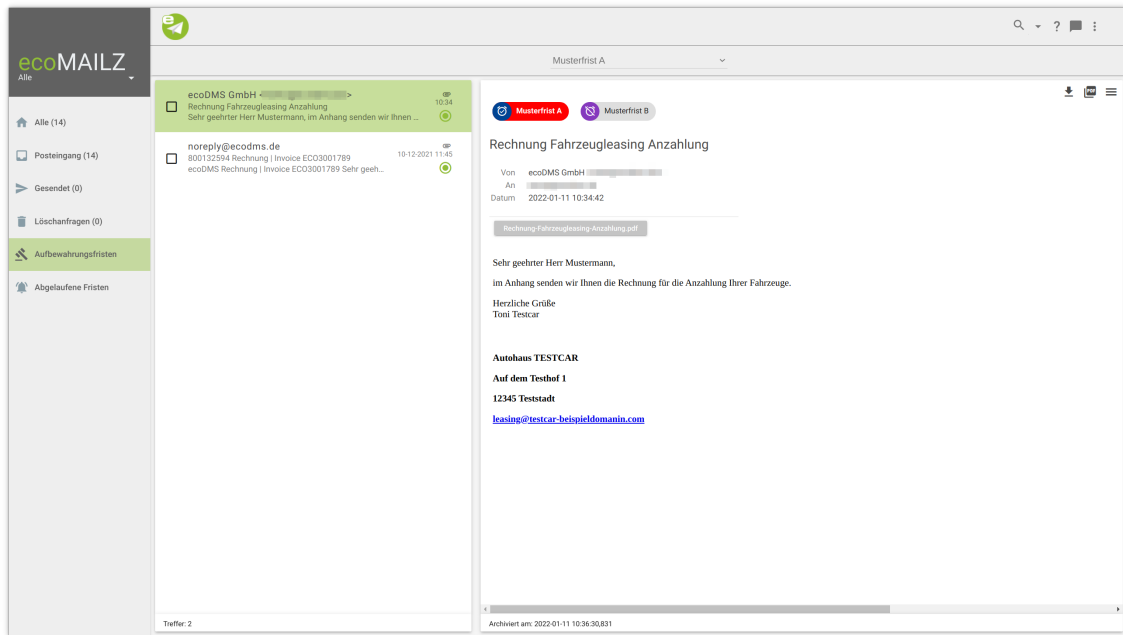


Figure 3.15: Retention Periods - Example Overview Including Chips

3.9.1 Create New Retention Period

To create a new retention period, complete the following steps:

1. Click the menu icon at the top right in ecoMAILZ Webclient.
2. Select the "Settings" menu item.
3. Select the "Retention Periods" menu item in the overview.
4. Click the green "Plus" icon to create and configure a new retention period.
 - a) **Name:** Enter a unique and descriptive name. It displays on a coloured chip in the details of finally archived emails
 - b) **Colour:** Specify the colour of the chip with the name of the retention period
 - c) **Search term:** Specify the terms the email must contain to set the retention period. Make sure the spelling is exact. You can use the parameters of the full-text search to assign the search terms (refer to the chapter Search & Filter -> Examples full-text search).
 - d) **Retention period** (numeric field): Enter the number of years, months or days after which the system deletes the logs
 - e) **Years, months, days:** Select the unit
 - f) **Erase automatically:** After a retention period has expired, the system either automatically erases the emails or the user (with the permission to answer erase requests) erases them manually. Enable the switch if you want the emails to be deleted automatically (green = enabled).

- If you have assigned the "Erase automatically" feature to a retention period, ecoMAILZ erases these emails automatically.
- In this case, ecoMAILZ does not generate an erasure log.
- The email is erased and cannot be restored.
- If the "Erase automatically" feature is NOT enabled, users with respective permissions can delete the e-mails manually users after the deadline has expired. Refer to the chapter "Expired Deadlines -> Delete Emails Manually" in this manual for more information about this process.

5. You can now enable the retention period in the overview.

- a) **Enable!** Use the switch on the left to enable a retention period (green = enabled, grey = disabled)
- b) **Note the prioritisation!** If you have created several retention periods, sort them by priority. The deadline with the highest priority and is applied first to the email, is at the top. In the email details, the first deadline is highlighted in red.

6. Click "OK" to save the settings or click "Cancel" to abort the process.

7. The entry appears in the overview, where you can edit or delete it.

3.9.2 Prioritize Retention Period

Note the prioritisation!

If you have created several retention periods, sort them by priority. The deadline with the highest priority and is applied first to the email, is at the top. In the email details, the first deadline is also highlighted in red.

- Use the arrow keys to the right of a retention period to move the entries up and down.

3.9.3 Enable Retention Period

Enable! Use the switch on the left to enable a retention period (green = enabled, grey = disabled)

- Enable a retention period with the switch on the left.

3.9.4 Edit Retention Period

- There is no guarantee that emails, whose retention period expired before it was edited or deleted, have not already been erased.
- Running email erasure processes ignore edits to retention periods. Any edits are applied in the following run.

To edit a retention period, complete the following steps:

1. Click the menu icon at the top right in ecoMAILZ Webclient.
2. Select the "Settings" menu item.
3. Select the "Retention Periods" menu item in the overview.
4. Click the "Edit" icon (pencil) next to the retention period.
5. Make your changes.
6. Click "OK" to save the settings or click "Cancel" to abort the process.
7. The modified entry appears in the overview, where you can edit or delete it.

3.9.5 Delete Retention Period

- Please note that you cannot undo the deletion of a retention period.
- There is no guarantee that emails, whose retention period expired before it was modified or deleted, have not already been erased.
- Running email erasure processes ignore edits to retention periods. Any edits are applied in the following run.

To delete a retention period, complete the following steps:

1. Click the menu icon at the top right in ecoMAILZ Webclient.
2. Select the "Settings" menu item.
3. Select the "Retention Periods" menu item in the overview.
4. Click the "Delete" icon (trash) next to the retention period.
5. Confirm the message "Do you really want to delete this retention period" with "Yes" to irrevocably remove the entry. Cancel the process with "No".

4 Configure Adapter

This is where you configure the email sources. The software offers import options from different mail servers and groupware solutions.

- In addition, "adapters" are fundamental for user access.
- Before you can configure users, you need to define the source of your Emails via the "adapters".
- At least one valid "adapter" should be available for each user you want to configure.
- You can individually configure and edit the review deadline for each adapter.

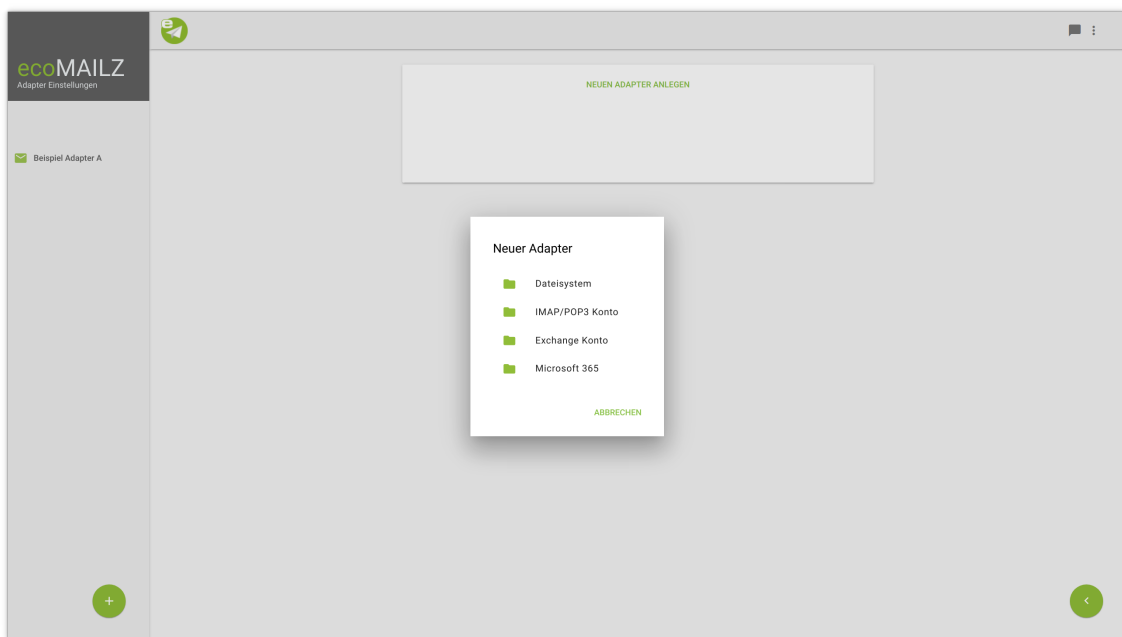


Figure 4.1: Adapter Settings - Create New Adapter (Overview)

4.1 File System

- You can use ecoMAILZ to retrieve and archive emails from a file system folder.
- You can only import EML files, but ecoMAILZ version 1.0.8 and later also support journal emails.

ecoMAILZ can download and archive EML files from a folder on the file system. To do so, complete the following steps:

1. Click the menu icon at the top right in ecoMAILZ Webclient.
2. Select the "Settings" menu item.
3. Select the "Adapter Settings" menu item in the overview.
4. To create and configure a new adapter, click the "Create New Adapter" button.
5. Select the "File System" entry.
6. **Adapter disabled / enabled (switch):** Enable the new adapter by clicking the "Switch" (green = enabled).
7. **Profile name:** Assign a unique profile name to the adapter.
8. **Monitored folder:** elect the source / the folder from which you want ecoMAILZ to download the emails.
 - a) This folder is located on the ecoMAILZ server and is monitored by ecoMAILZ.
 - b) ecoMAILZ downloads incoming messages from the folder in a selected interval and archives them.
9. **Monitoring interval (seconds):** Enter in which interval you want ecoMAILZ to check the folder for new Emails. Enter the value in number of seconds. For example

60

10. After downloading the emails, you can either remove them from the folder (**"Delete files after processing"**) or rename them (**"Rename files after processing"**). Click the option you want to select.

- a) **Suffix for renamed files:** If you want to rename the files after processing, please enter the "suffix". This implies the new filename extension. For example:

.archived

or

.arch

- b) This ending indicates to ecoMAILZ that these Emails have already been downloaded.
 - i. Emails with this ending are not downloaded again.
 - ii. Please note that Emails that have already been retrieved and which have a new file extension must not be reformatted to .eml again. Otherwise the system will continually process these Emails.
- c) Please also refer to the information in the chapter 1.1.2 in this manual.

11. **Review deadline:** When creating an adapter, ecoMAILZ uses the default review deadline configured in the "Global Settings - Review Deadline" dialogue box. You can change the review deadline for this adapter. In the "Review Deadline" area, enter the period for the deadline. These are numeric fields (archive all fields set to 0 = Archiving e-mails immediately and irrevocably).
 - a) **Days:** Enter an integer for the number of days until final archiving.

- i. Possible values: 0-365
- b) **Hours:** Enter an integer for the number of hours until final archiving.
 - i. Possible values: 0-23
- c) **Minutes:** Enter an integer for the number of minutes until final archiving.
 - i. Possible values: 0-59

12. Now click "Save".

- a) The settings are now saved in the list of available adapters (left column in the "Adapter Settings" dialogue box).
- b) Click the list to open and edit or delete the settings.

13. To close the Settings dialogue box, click the green "Return" icon at the bottom right.

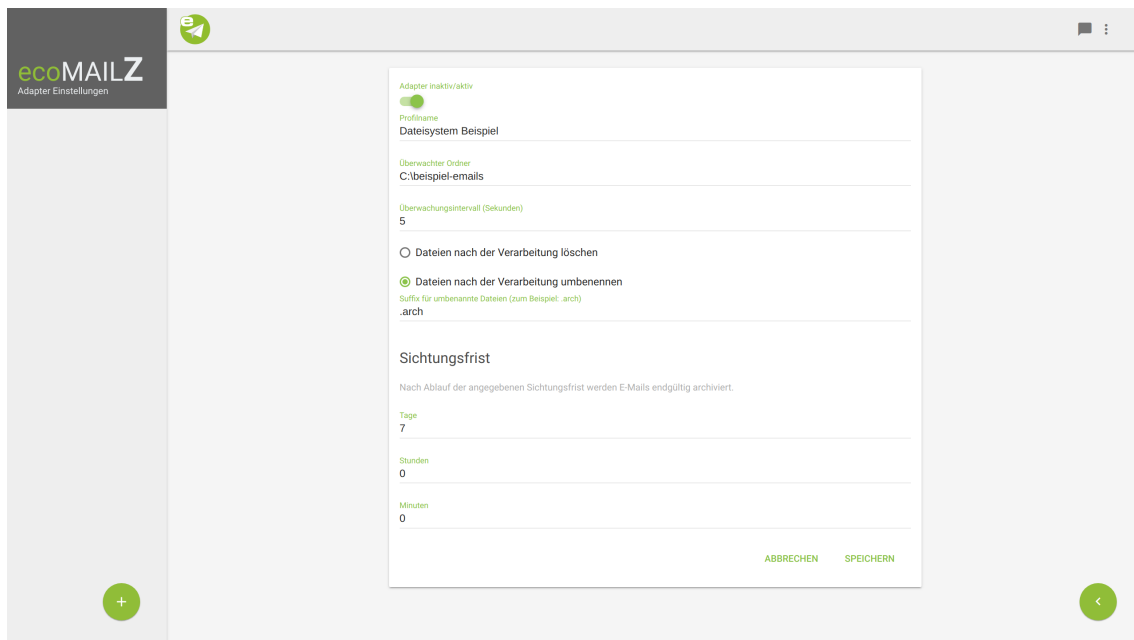


Figure 4.2: Adapter Settings - File System - Example with Suffix

4.2 IMAP / POP3 Account

If you want to archive your Emails from an IMAP or POP3 account, complete the following steps:

1. Click the menu icon at the top right in the ecoMAILZ Webclient.
2. Select the "Settings" menu item.
3. Select the "Adapter Settings" menu item in the overview.
4. To create and configure a new adapter, click the "Create New Adapter" button.
5. Select the "IMAP / POP3 Account" item.

6. **Adapter disabled / enabled (switch):** Enable the new adapter by clicking the "Switch" (green = enabled).
7. **Profile name:** Assign a unique profile name to the adapter.
8. **IMAP folder:** From these folders ecoMAILZ downloads the emails it archives.

- a) Select the required folders by checking them in the list.
 - i. To do so, you must first enter and load all mail server information.
 - ii. The list box is available after you successfully executed the "Check Settings" function.
 - iii. When using IMAP adapters, drafts are excluded during archiving.
 - A. ATTENTION: This is not supported by POP3.
 - iv. POP3 accesses the inbox only. Therefore, you do not need to select any other folders.
- b) ecoMAILZ monitors the enabled folders.
- c) ecoMAILZ downloads incoming messages from the folder in a selected interval and archives them.

9. **Monitoring interval (seconds):** Enter in which interval you want ecoMAILZ to check the email account for new Emails. Enter the value in number of seconds.
10. **Server address:** Enter the address of your mail server. This can, for example, be an IP address or a server name, depending on your mail server configuration.
11. **Server port:** Enter the server port for the inbox of your mail server.
12. **Protocol:** Select the appropriate protocol of your mail server. ecoMAILZ supports the following protocols and displays them for selection:
 - a) IMAP (SSL/TLS)
 - b) IMAP (STARTTLS)
 - c) IMAP
 - d) POP3 (SSL/TLS)
 - e) POP3 (STARTTLS)
 - f) POP3

For IMAP (SSL/TLS) and IMAP (STARTTLS), ecoMAILZ supports TLSv1, TLSv1.1 and TLSv1.2.

13. **Ignore certificate error (Switch):** ecoMAILZ archives Emails per default, regardless whether an error occurs in the stored certificate of the email server. If you want to include certificates, you can disable the "Ignore certificate errors" function.
 - a) Ignore certificate error = green
 - b) Include certificate error = grey
14. **Username:** Enter the user name for the email account you want to archive.

- a) Please note: We recommend you work with a technical user who has access to a central inbox with all Emails. In the user management section of ecoMAILZ, you can assign access and reading permissions to users for the appropriate Email accounts. For more information, refer to 1.5 in this manual.

15. **Password:** Enter the password associated with the username.
16. **Archive all Emails starting from:** Select the start date for Email archiving. Emails in ecoMAILZ are downloaded and saved to the archive from the day you set here.
 - a) **Archive unread Emails only:** s an option, you can save only unread Emails to the email archive. In this case you must enable the function "Archive unread Emails only".
 - i. If this function is enabled, you must select an action for the already archived Emails to ensure that they are not archived twice.
 - ii. 2. ATTENTION! When using POP3, archiving "only unread Emails" is not supported.
17. After the emails are downloaded, you can choose among the following actions:
 - a) **No action:** the emails remain unchanged on the mail server.
 - b) **Delete Emails after processing:** the emails are removed from the mail server after processing.
 - c) **Mark Emails as read after processing:** Unread Emails are marked as read on the mail server after processing.
 - d) **Delete / mark as read already archived Emails on the server (switch):** When the functions "Delete Emails after processing" or "Mark Emails as read after processing" are enabled, you can delete, or mark as read already archived Emails on the server.
18. **Review deadline:** When creating an adapter, ecoMAILZ uses the default review deadline configured in the "Global Settings - Review Deadline" dialogue box. You can change the review deadline for this adapter. In the "Review Deadline" area, enter the period for the deadline. These are numeric fields (archive all fields set to 0 = Archiving e-mails immediately and irrevocably).
 - a) **Days:** Enter an integer for the number of days until final archiving.
 - i. Possible values: 0-365
 - b) **Hours:** Enter an integer for the number of hours until final archiving.
 - i. Possible values: 0-23
 - c) **Minutes:** Enter an integer for the number of minutes until final archiving.
 - i. Possible values: 0-59
19. **Check settings:** Click the "Check Settings" button to let the system check the mail server configurations. ecoMAILZ checks your entries and displays any error messages in a dialogue box.
 - a) If the check is successful, you have the option to share more IMAP folders for archiving.
20. If your entry and check are successful, you can save the adapter. To do so, click "Save".
 - a) The settings are now saved in the list of available adapters (left column in the "Adapter Settings" dialogue box).
 - b) Click the list to open and edit or delete the settings.

21. To close the Settings dialogue box, click the green "Return" icon at the bottom right.

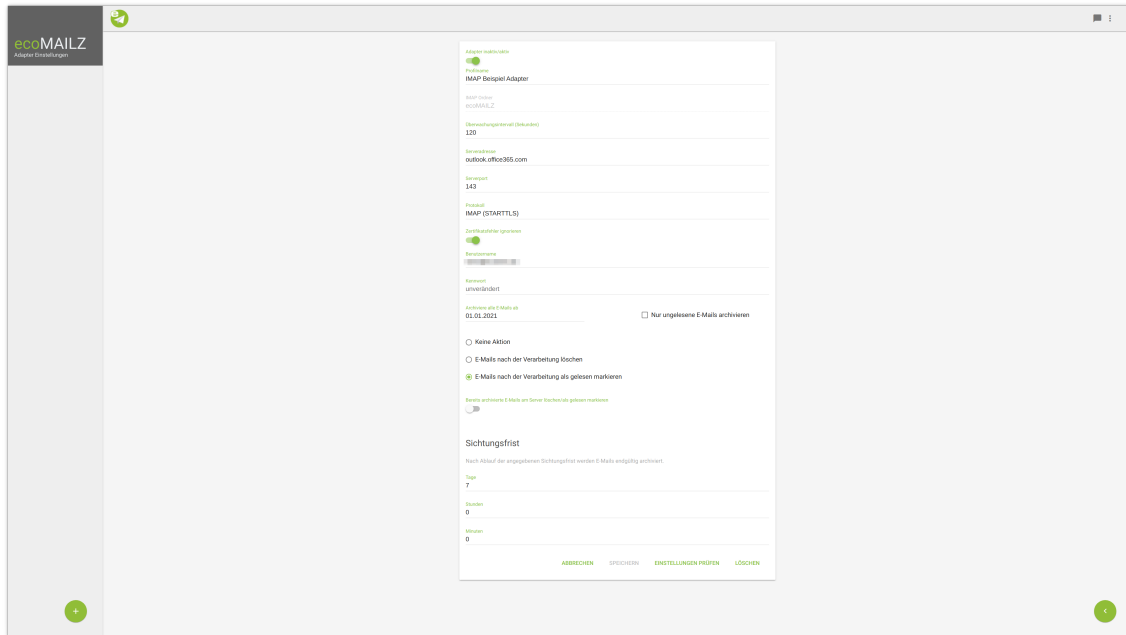


Figure 4.3: Adapter Settings - IMAP / POP3 (IMAP - SSL/TLS)

4.3 Exchange Account

If you want to archive your Emails from an exchange server, complete the following steps:

1. Click the menu icon at the top right in the ecoMAILZ Webclient.
2. Select the "Settings" menu item.
3. Select the "Adapter Settings" menu item in the overview.
4. To create and configure a new adapter, click the "Create New Adapter" button.
5. Select the "Exchange" item.
6. **Adapter disabled / enabled (switch):** Enable the new adapter by clicking the "Switch" (green = enabled).
7. **Profile name:** Assign a unique profile name to the adapter.
8. **Exchange folder:** From these folders ecoMAILZ downloads the emails it archives.

- a) 1. Select the required folders by checking them in the list.
 - i. To do so, you must first enter and load all mail server information.
 - ii. The list box is available after you successfully executed the "Check Settings" function.
 - iii. When using Exchange adapters, drafts are excluded during archiving.
- b) ecoMAILZ monitors the enabled folders.
- c) ecoMAILZ downloads incoming messages from the folder in a selected interval and archives them.

9. **Monitoring interval (seconds):** Enter in which interval you want ecoMAILZ to check the email account for new Emails. Enter the value in number of seconds.

10. **Activating OAuth:** If you want to use OAuth with an exchange server, you must enable the function here (green = active). In addition to the default entry fields, fill in the entry fields of the following settings for OAuth. Use the values from your existing OAuth configuration.

a) **OAuth Resource:** Enter the server (service) with the protected resources, e.g.

```
https://outlook.office365.com
```

b) **OAuth Request URL:** The authorization server returns the answer here following authorization. Enter your value, e.g.

```
https://login.microsoftonline.com/
```

c) **OAuth Tenant Name:** Use the tenant value in the request path to specify which user can log on to the application. Enter your value here.

d) **OAuth Client ID:** Enter the application ID (client ID) assigned to your app in the portal.

e) **OAuth Client Secret:** This key is only known to the application and the authorization server. Enter your value here.

11. **Exchange web service Url:** Enter the address of your exchange server. The service URL is the address via which Exchange communicates with the exchange web services (EWS). The service URL for an exchange server can look like the following:

```
https://SERVER-NAME/EWS/Exchange.asmx
```

12. **Batch size:** Enter how many messages per call you want ecoMAILZ to download within a monitoring interval. This is a numeric field. Example value:

```
100
```

13. **Username:** Enter the username for the email account you want to archive. As a rule, this is your domain name, followed by a backslash and your account ID. Often the account ID is part of your Email address before the "@" symbol and the domain is the part of your Email address behind the "@" symbol. This, however, does not always

apply. The username can also be the full Email address, depending on the settings of your exchange server. An example for a user name is:

```
sampldomain\username
```

Please note: We recommend you work with a technical user who has access to a central inbox with all Emails. In the user management section of ecoMAILZ, you can assign access and reading permissions to users for the appropriate Email accounts. For more information, refer to 1.5 in this manual.

14. **Password** (*This field is only visible with the default configuration without OAuth*): Enter the password associated with the username.
15. **Domain** (*This field is only visible with the default configuration without OAuth*): Enter the address of your exchange account. Often the domain is part of your Email address after the "@" symbol. This, however, does not always apply.
16. **Archive all Emails starting from:** Select the start date for Email archiving. Emails in ecoMAILZ are downloaded and saved to the archive from the day you set here.
 - a) **Archive unread Emails only:** As an option, you can save only unread Emails to the email archive. In this case you must enable the function "Archive unread Emails only".
 - i. If this function is enabled, you must select an action for the already archived Emails to ensure that they are not archived twice.
17. After the emails are downloaded, you can choose among the following actions:
 - a) **No action:** the emails remain unchanged on the mail server.
 - b) **Delete Emails after processing:** the emails are removed from the mail server after processing.
 - c) **Mark Emails as read after processing:** Unread Emails are marked as read on the mail server after processing.
 - d) **Delete / mark as read already archived Emails on the server:** When the functions "Delete Emails after processing" or "Mark Emails as read after processing" are enabled, you can delete, or mark as read already archived Emails on the server.
18. **Review deadline:** When creating an adapter, ecoMAILZ uses the default review deadline configured in the "Global Settings - Review Deadline" dialogue box. You can change the review deadline for this adapter. In the "Review Deadline" area, enter the period for the deadline. These are numeric fields (archive all fields set to 0 = Archiving e-mails immediately and irrevocably).
 - a) **Days:** Enter an integer for the number of days until final archiving.
 - i. Possible values: 0-365
 - b) **Hours:** Enter an integer for the number of hours until final archiving.
 - i. Possible values: 0-23

c) **Minutes:** Enter an integer for the number of minutes until final archiving.

i. Possible values: 0-59

19. **Check settings:** Click the "Check Settings" button to check the exchange configurations. The system checks your entries and displays any error messages in a dialogue box.
20. If your entry and check are successful, you can save the adapter. To do so, click "Save".
 - a) The settings are now saved in the list of available adapters (left column in the "Adapter Settings" dialogue box).
 - b) Click the list to open and edit or delete the settings.
21. To close the Settings dialogue box, click the green "Return" icon at the bottom right.

The screenshot shows the 'Exchange Adapter' configuration window in ecoMAILZ. The window is titled 'Exchange Adapter' and contains several input fields and checkboxes. The fields include 'Exchange Server', 'Exchange Web Services URL', 'Exchange Web Services Username', 'Exchange Web Services Password', 'Exchange Web Services URL', 'Exchange Web Services Username', 'Exchange Web Services Password', 'Exchange Web Services URL', 'Exchange Web Services Username', 'Exchange Web Services Password'. There are also checkboxes for 'Nur ungelernte E-Mails archivieren', 'Keine Aktion', 'E-Mails nach der Verarbeitung löschen', and 'E-Mails nach der Verarbeitung als gelesen markieren'. At the bottom, there are buttons for 'ABRECHEN', 'SPEICHERN', 'EINSTELLUNGEN PRÜFEN', and 'LÖSCHEN'.

Figure 4.4: Adapter Settings - Exchange

4.4 Microsoft 365

- To set up and use the adapter for Microsoft 365, you need to make some basic settings in Azure.
- For more information, refer to the notes in the ecoDMS knowledge base, where you can learn more about the required settings in Azure.
- Use the following link to access the knowledge base:

<https://confluence.applord-gruppe.eu/ek>

To archive emails from Microsoft Office 365 in ecoMAILZ, complete the following steps:

1. ecoMAILZ Menu -> Settings
2. Select the "Adapter Settings" menu item in the overview.
3. Click the "Create New Adapter" button
4. Select "Microsoft 365" from the list
5. **Adapter disabled / enabled (switch:** Click the "toggle" (green = enabled) to enable the adapter
6. **Profile name:** Enter a name to recognise and retrieve the adapter
7. **Monitoring interval (seconds:** Enter the interval in which you want ecoMAILZ to check the email account for new emails. Enter the value in number of seconds.
8. **Application ID:** The ID of the application (client) created in Azure
9. **Client:** The ID of the client created in Azure (directory ID)
10. **Secret:** The secret client key associated with the application created in Azure (secret client key)
11. **Select account (green user button:** Select the user accounts

- a) To do so, you must first enter and load all mail server information.
- b) The list box is available after you successfully executed the "Check Settings" function.
- c) ecoMAILZ monitors the enabled accounts.
- d) You can only save the adapter if you have selected at least one account and at least one folder for each selected account.

12. **Edit account folder:** Once you have selected the accounts, select the folders you want to archive. To do so, click the folder icon next to the email address

- a) You can select the folders you want to archive (e.g. Inbox, Sent...) separately for each account.
 - i. The following folders are automatically excluded: Drafts, Outbox, Synchronisation Issues, Conflicts, Local Errors, Server Errors, Conversation History
- b) ecoMAILZ retrieves and archives the messages from the selected accounts and folders at the selected interval.

13. **Add Inbox:** Enable this switch (green = enabled) if you want ecoMAILZ to archive the inbox folder automatically for all selected accounts
14. **Archive all emails starting from:** Start date for email archiving. Set the day from which you want to start downloading and saving emails from ecoMAILZ to the archive.

- a) **Archive unread emails only:** As an option, you can save unread emails to the email archive. In this case, enable the function "Archive unread emails only".
 - i. If you enable this function, select an action for the already archived emails to ensure that they are not archived twice.

15. After downloading the emails, select one of the following actions:

- a) **No action:** The emails remain unchanged on the email server.
- b) **Delete emails after processing:** The emails are removed from the email server after processing.
- c) **Mark emails as read after processing:** Unread emails are marked as read on the email server after processing.
- d) **Delete / mark as read already archived emails on the server (switch):** If you enable "Delete emails after processing" or "Mark emails as read after processing", archived emails are deleted or marked as read on the mail server.

16. **Review deadline:** When creating an adapter, ecoMAILZ uses the default review deadline configured in the "Global Settings - Review Deadline" dialogue box. You can change the review deadline for this adapter. In the "Review Deadline" area, enter the period for the deadline. These are numeric fields (all fields set to 0 = finally archive emails immediately).

- a) **Days:** Enter the number of days until final archiving
 - i. Possible values: 0-365
- b) **Hours:** Enter the number of hours until final archiving
 - i. Possible values: 0-23
- c) **Minutes:** Enter the number of minutes until final archiving
 - i. Possible values: 0-59

17. **Check settings:** Click the "Check Settings" button to let the system check the email server configurations. ecoMAILZ checks your entries and displays any error messages in a dialogue box.

- a) If the verification is successful, you can configure more IMAP folders for archiving.

18. After verification, click "Save" to save the adapter settings.

- You can only save the adapter settings if you have selected at least one account and at least one folder for each selected account.
- The settings are now saved in the list of available adapters (left column in the "Adapter Settings" dialogue box).
- Click the list to open and edit or delete the settings.

19. To close the Settings dialogue box, click the green "Return" icon.

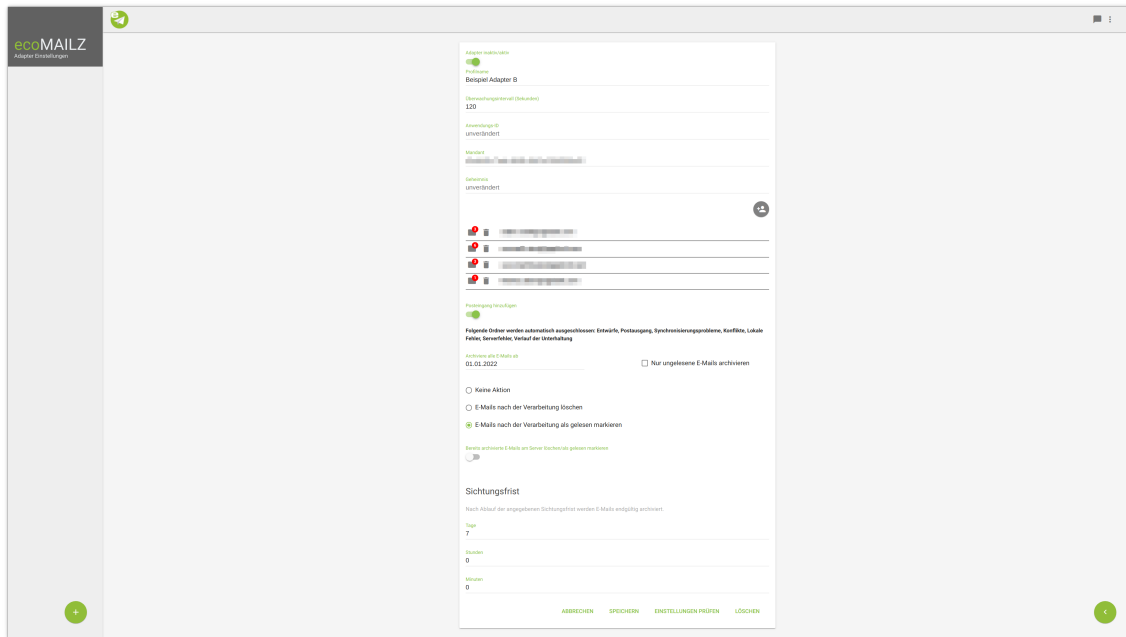


Figure 4.5: Adapter Settings - Microsoft Office 365

4.5 Edit Adapter

You can edit adapters if required. To do so, complete the following steps:

1. Click the menu icon at the top right in the ecoMAILZ Webclient.
2. Select the "Settings" menu item.
3. Select the "Adapter Settings" menu item in the overview.
4. Select the adapter you want to edit from the list of available adapters (left column in the "User Management" dialogue box).
5. Make your changes.
6. Now click "Save".
 - a) The settings are stored for the selected adapter.
7. To close the Settings dialogue box, click the green "Return" icon at the bottom right.

4.5.1 Edit Review Deadline

You can configure and edit the review deadline. When you edit a review deadline, ecoMAILZ displays a dialogue box:

"Do you want to adapt the review deadline for existing Emails?"

- **Yes:** The new review deadline is applied to already archived Emails.
- **No:** The new review deadline is not applied to archived Emails (only to new Emails that arrive after saving).

4.6 Delete Adapter

You can only delete an adapter if there is no user to whom the function "Login via adapter" is assigned.

To delete an adapter, complete the following steps:

1. ecoMAILZ Menu -> Settings
2. Select the "Adapter Settings" menu item in the overview.
3. Select the adapter you want to delete from the list of available adapters
4. Click the "Delete" button
5. Confirm the security prompt "Do you want to delete this adapter?" with "Yes"
 - a) or click "No" to cancel.
6. To close the Settings dialogue box, click the green "Return" icon

5 User Management

- The "ecoMAILZ" user is automatically created during the installation of the email archive. For more details about this user, refer to the chapter "Login Credentials".
 - **Attention! This is the default user of ecoMAILZ. It serves the purpose of your first login and setting up your system. This user cannot see any Emails. Please create users with respective permissions in order to start working with ecoMAILZ.**
 - The password to this user can be configured in the user management.
 - The username cannot be changed.
 - This user cannot be deleted.
- Users and adapters must be considered independently. However, you can use configured adapters for authentication.
- A username must not contain a colon.

:

You can create and manage the users who can log on and use ecoMAILZ. Each user can be associated with several email accounts (email addresses). Users can login to the Webclient with the configured login credentials and receive access to all emails that are associated with their respective email address(es).

5.1 Create New Users

To create a new user, complete the following steps:

1. Click the menu icon at the top right in the ecoMAILZ Webclient.
2. Select the "Settings" menu item.
3. Select the "User Management" menu item in the overview.
4. To create and configure a new user, click the "Create New User" button.
5. **Administrator (switch):** Enable the "switch" if you want to assign administrator permissions to the user (green = enabled).

"Administrator" permissions should only be assigned to users who manage the system and are allowed to execute sensitive functions. The administrator can make various settings and assign login credentials. Depending on their user settings, administrators have access to all Emails, including sensitive Emails. Therefore, "administrator" permissions should only be assigned to trustworthy people with managerial authority and in-depth programme knowledge.

6. Select how the user should login to ecoMAILZ.

a) **Local user**

- If a user should login to ecoMAILZ with a local user, the user receives separate login credentials.
- In this case, username and password are independent of the email account.
- The user can login to the ecoMAILZ Webclient with these login credentials.

b) Username: Enter the username to login to the Webclient.

- i. Password: Enter the ecoMAILZ login password for the user.

c) **Login via adapter**:

- To avoid that a user requires separate passwords to access both the email system and ecoMAILZ, ecoMAILZ offers authentication via a configured adapter.
- The username and password are checked by the selected adapter.
- The system checks whether the username can be authenticated by the configured adapter.
- The username and password thus depend on the email account of the mail server.
- To login to the ecoMAILZ Webclient, users can use the login credentials of their Email account.
- The username in this case must be the username of the configured Email account(s).
- You can only use the following adapter types: Exchange (only without Oauth), IMAP/POP3, Microsoft 365
- To display an adapter, it must be enabled.

d) Username: Enter the username to login to the mail server.

- i. Adapter to be used: Select the adapter you want to use to authenticate the login credentials.

7. **Language (Locale)**: Select the language (Locale) of the Webclient for the user. The language can be German (de_DE) or English (en_US).

8. **Personal Email addresses separated by a (,)**: Enter the email addresses associated with the user. Users can only see the messages in the inbox of the email addresses that are configured for them. Separate multiple addresses with a comma ",". For example:

```
my1Email@sampldomain.com,my2mail@sampldomain.com,my3mail@sampldomain.com
```

- a) To give a user access to all available Email addresses, enter an asterisk "*" in this box. The entry looks like this:

```
*
```

Please note: Access to all Emails should be treated highly confidentially. We recommend that Email access is exclusively granted to users who have managerial authority and who have the permission to view every Email without exception.

- b) You can also enter Email addresses with the wildcards * and ?. It is important that when using a wildcard, you always enter a valid Email address with the @ character and a dot before the top-level domain (for example: "de" or "com").

- i. Examples for permitted Email entries:

```
john.doe@*.com
```

```
*@domain.com
```

```
john.*@*.*
```

```
???.doe@domain.??
```

- ii. Examples for invalid Email entries:

```
*domain.com
```

```
john.doe@*
```

```
*john*
```

9. **Access to finally archived Emails from the following Email addresses (separated by a ";"):** Emails from different users and Email addresses can be archived in ecoMAILZ. Per default, it is only possible to access personal Email accounts. In addition, it is possible to grant read access to finally archived Emails (status: green, review deadline is expired and/or skipped) from other users. If this is required, enter the email addresses here. Otherwise you can leave the box empty. For example:

```
j.doe@sampldomainin.com,c.smith@sampldomain.com
```

- a) To give a user access to all available Email addresses, enter an asterisk "*" in this box. The entry looks like this:

*

Please note: Access to all Emails should be treated highly confidentially. We recommend that Email access is exclusively granted to users who are authorised to issue instructions and who have the permission to view every finally archived Email.

- b) You can also enter Email addresses with the wildcards * and ?. It is important that when using a wildcard, you always enter a valid Email address with the @ character and a dot before the top-level domain (for example: "de" or "com").

- i. Examples for permitted Email entries:

john.doe@*.com

*@domain.com

john.*@*.com

???.doe@domain.??

- ii. Examples for invalid Email entries:

*domain.com

john.doe@*

john

10. **Notifications for adapters:** Enable this "switch" if you want users to receive information through the Notifications dialogue (in the speech bubble in the ecoMAILZ header) about problems, errors and special technical features of the available adapters (enabled = green).
11. **Notifications for backups:** Enable this "switch" if you want users to receive information through the Notifications dialogue (in the speech bubble in the ecoMAILZ header) about problems, errors and special features when executing backups (enabled = green).
12. **Send erasure requests:** Enable this "switch" if you want to give a user the permission to select Emails for final erasure. This user can then request the person with the "Erase" role to remove the selected messages from the archive. Enabling and executing this function does not, however, allow this user to erase messages autonomously. The user may only send an erase request for the selected Email (enabled = green).
 - a) Notifications: If the function "Send erasure requests" is enabled, the user automatically receives messages about the erase request in the message dialogue (in the speech bubble in the ecoMAILZ header).
 - b) Please note:

- i. Treat the "Erase" function with utmost care. Erasing Emails should be executed confidentially and with due consideration. We recommend you assign this function to selected users only.
 - ii. From 2 users onwards, we strongly recommend the application of the two-man rule. Enable this function via "Settings - Global Settings - Erase Requests". The two-man rule is set as default.
- 13. **Respond to Erase Requests:** Enable this "switch" to permit a user to respond to erase requests. This user can then decide how to respond to the individual erase requests. The user can either retain the selected messages in the archive or approve the erase request (enabled = green).
 - a) **Respond to Erase Requests Independent of Permissions:** When the setting "Respond to erase requests" is enabled, the sub-function "Respond to erase requests independent of permissions" can be enabled if required (green = enabled).
 - i. *This is an example of how to apply this sub-function: A company is working with the recommended two-man rule when deleting Emails. By default, a user in ecoMAILZ only sees Emails for which he or she has a permission. It may be the case, however, that the user must consent to deleting an Email for which he or she does not have a read permission. To enable the staff responsible for processing erase requests independent of their read permissions, the setting "Respond to erase requests independent of permissions" allows them to see all erase requests independent of their user permissions. These Emails, however, are only visible in the "Erase Requests" section. They are not displayed in the main overview section, which will continue to display only those Emails for which the user has a read permission.*
 - A. Notifications: If the function "Answer erase requests" is enabled, the user automatically receives notifications about the erase request in the Notifications dialogue (in the speech bubble in the ecoMAILZ header).
 - B. Please note:
 - Treat the "Erase" function with utmost care. Erasing Emails should be executed confidentially and with due consideration. We recommend this function to be enabled only for users with managerial authority and who have the permission to view all Emails in ecoMAILZ.
 - From 2 users onwards, we strongly recommend the application of the two-man rule. Enable this function via "Settings - Global Settings - Erase Requests". The two-man rule ensures that a user cannot erase his or her own Emails from the archive. The "Two-Man Rule" is set to default.
- 14. **View erasure logs:** Enable this "toggle" (green = enabled) to assign the permission to access erasure logs in ecoMAILZ to the user. This refers to any emails that have been erased from the archive through an erasure request and replaced by an erasure log.
- 15. To close the Settings dialogue box, click the green "Return" icon at the bottom right.
- 16. Click "Create".
 - a) The configuration is saved in the list of available users (left column in the "User Management" dialogue box).
 - b) Click the list to open and edit or delete the settings.
- 17. To close the Settings dialogue box, click the green "Return" icon at the bottom right.

The screenshot shows the 'Benutzer anlegen' (Create User) form in the ecoMAILZ interface. The form is titled 'Benutzer anlegen' and 'Neuen Benutzer anlegen'. It has two radio buttons: 'Lokaler Benutzer' (selected) and 'Login über Adapter'. The form fields include: 'Benutzername' (f.musterfrau), 'Zu verwendender Adapter' (IMAP BEISPIEL), 'Sprache (Locale)' (de_DE), 'Persönliche E-Mail-Adressen (getrennt durch ,)' (m.mustermann@testmaildomainbeispiel.de), and 'Zugriff auf endgültig archivierte E-Mails folgender E-Mail-Adressen (getrennt durch ,)' (buchhaltung@testmaildomainbeispiel.de). There are two sections for permissions: 'Benachrichtigungen für Adapter' and 'Benachrichtigungen für Datensicherung', each with three toggle switches. At the bottom right are buttons 'ABBRECHEN' and 'ERSTELLEN'.

Figure 5.1: User Management - Login with Adapter (IMAP)

5.2 Search User

If you have created several users, you can use the search function (left column in the "User Management" dialogue box) to search for specific usernames in the user management section.

1. Just enter the search term in the search box.
2. Confirm your entry with "Enter".
3. ecoMAILZ displays the matching results.
4. Click the "x" icon to exit the search.

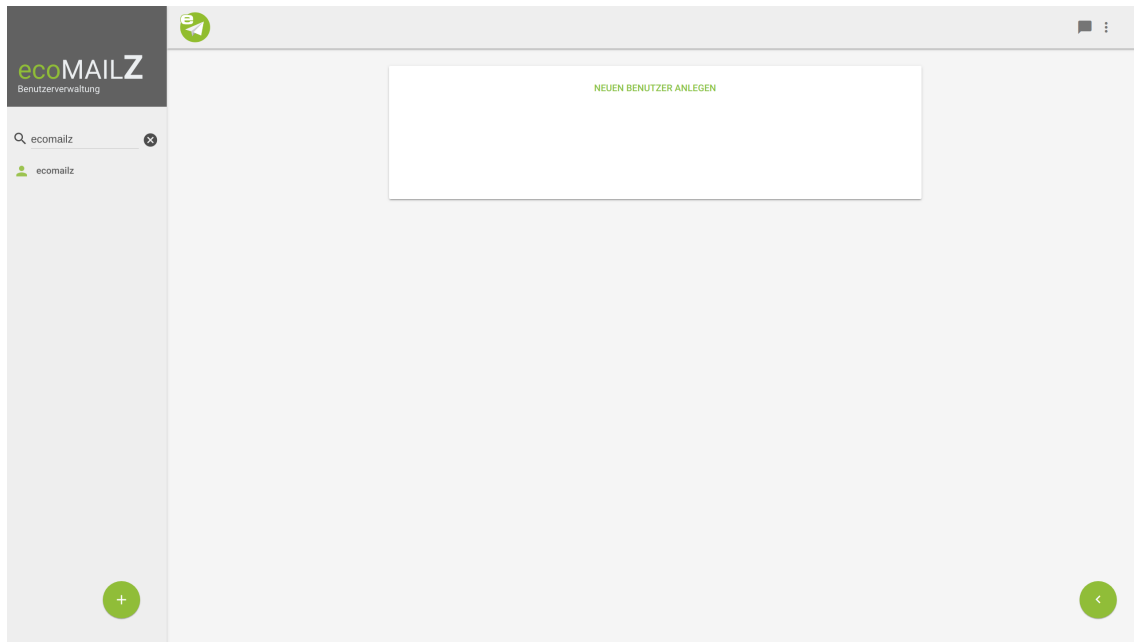


Figure 5.2: User Management - Search User (Search Box)

5.3 Edit User

You can edit users if required. To do so, complete the following steps:

1. Click the menu icon at the top right in the ecoMAILZ Webclient.
2. Select the "Settings" menu item.
3. Select the "User Management" menu item in the overview.
4. Select the user you want to edit from the list of available users (left column in the "User Management" dialogue box).
 - a) You can also use the search function to search for the user you want to delete (refer to "Search User").
5. Make your edits in the "Edit User" window.
6. Now click "Save".
 - a) The settings are saved for the selected user.
7. To close the Settings dialogue box, click the green "Return" icon at the bottom right.

5.4 Delete User

You can delete users if required. What is special when deleting a user in ecoMAILZ is that this process does not affect the emails associated with the user. Finally archived Emails remain in ecoMAILZ after a user has been deleted.

1. Click the menu icon at the top right in the ecoMAILZ Webclient.

2. Select the "Settings" menu item.
3. Select the "User Management" menu item in the overview.
4. Select the user you want to delete from the list of available users (left column in the "User Management" dialogue box).
 - a) You can also use the search function to search for the user you want to delete (refer to "Search User").
5. In the "Edit User" window, click the "Delete" button.
6. Confirm the "Do you want to delete this user?" confirmation prompt with "Yes", or cancel the delete process by clicking "No".
7. To close the Settings dialogue box, click the green "Return" icon at the bottom right.

5.5 Change Password (Through Administrator)

A user with administrator permissions can always change the password of a local ecoMAILZ user. Otherwise, the login credentials configured in the mail server apply. These are independent of ecoMAILZ and can only be edited in the mail server itself.

To change the password of a local user, complete the following steps:

1. Click the menu icon at the top right in the ecoMAILZ Webclient.
2. Select the "Settings" menu item.
3. Select the "User Management" menu item in the overview.
4. Select the user you want to edit from the list of available users (left column in the "User Management" dialogue box).
 - a) You can also use the search function to search for the user you want to delete (refer to "Search User").
5. Enter the new password for the local user in the "Edit User" window.
6. Now click "Save".
 - a) The settings are saved for the selected user.
7. To close the Settings dialogue box, click the green "Return" icon at the bottom right.

5.6 Change Password (Through User)

Users themselves can always change the password of their local ecoMAILZ user. In all other cases, the login credentials configured in the mail server apply. These are independent of ecoMAILZ and can only be edited in the mail server itself.

To change your personal password, complete the following steps:

1. Click the menu icon at the top right in the ecoMAILZ Webclient.
2. Select the "Change Password" menu item.
3. Enter the following information into the "Change Password" window:
 - a) **Old password:** Enter the current password of your local ecoMAILZ user with which you are logged in.
 - b) **New password:** Enter the new password.
 - c) **Repeat password:** Repeat the new password.
4. Now click "Change".
5. The settings are saved for your username.
6. ecoMAILZ displays a message if the modification was successful. Finalise your entry with "OK".

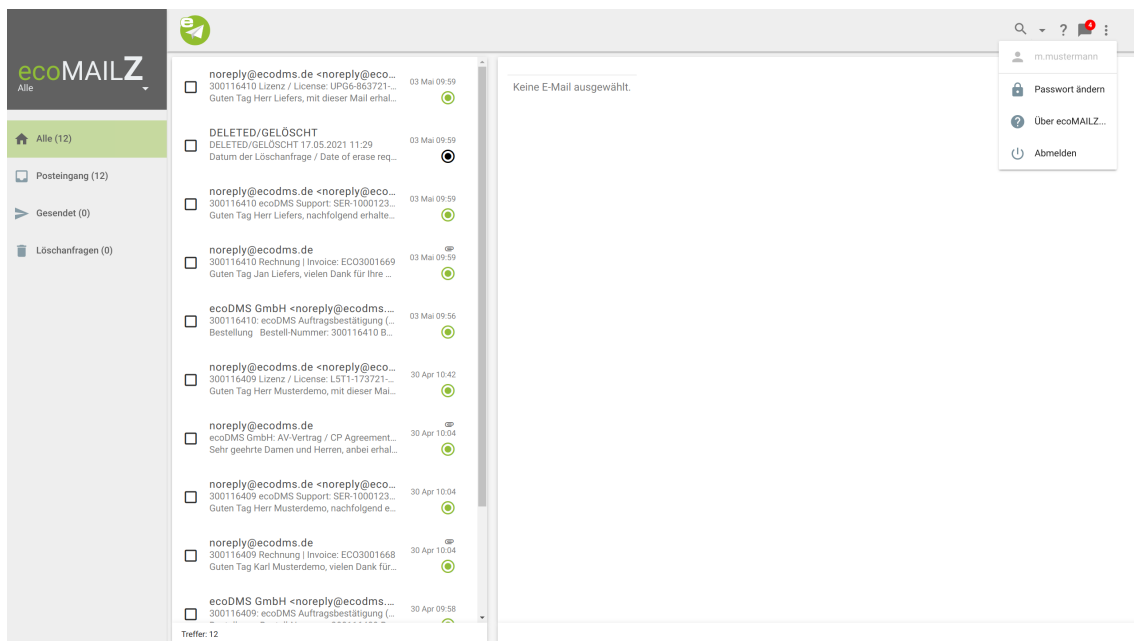


Figure 5.3: Local User - Function - Change Personal Password

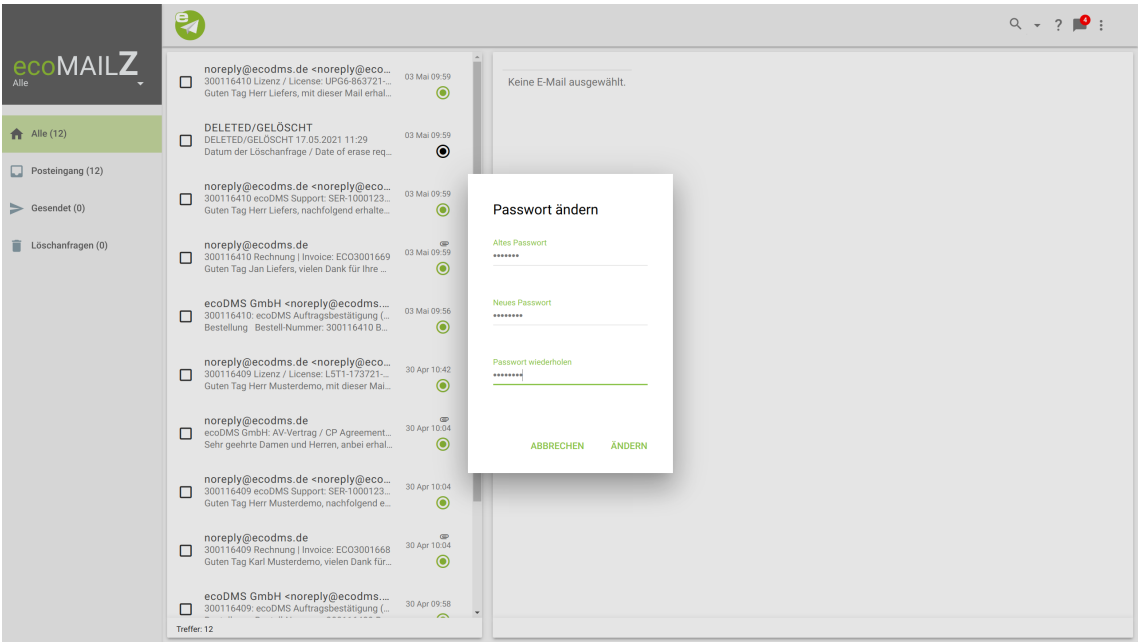


Figure 5.4: Local User - Change Personal Password

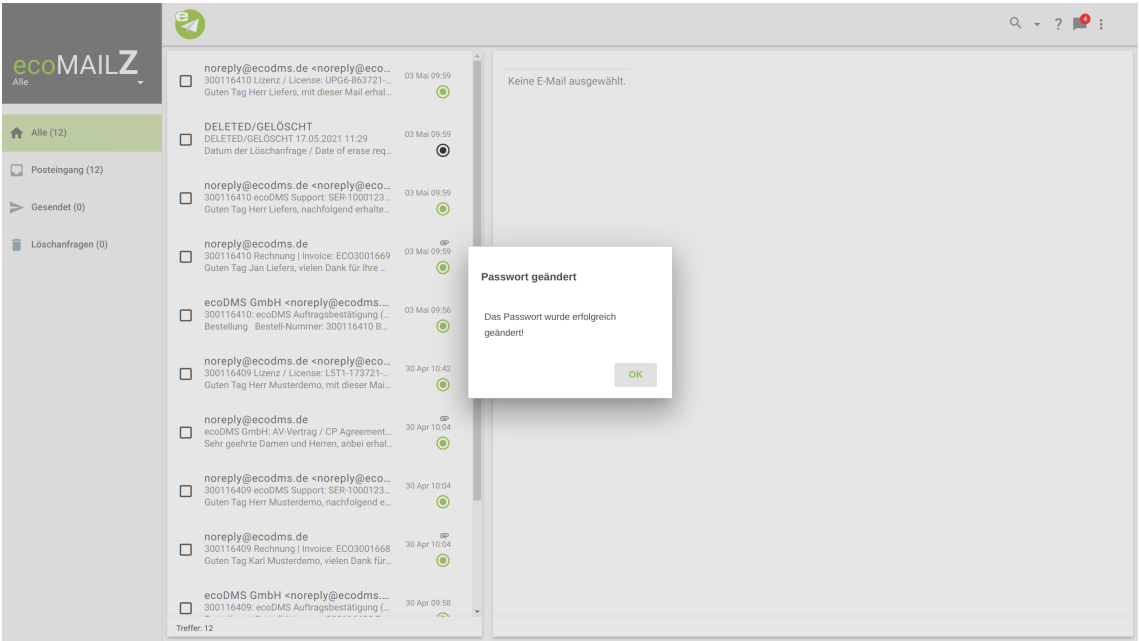


Figure 5.5: Local User - Successful Change of Personal Password

6 Emails

ecoMAILZ automatically downloads the emails for archiving in accordance with the configured adapters. The Web-client displays the emails to the appropriate user in a list, sorted by date in descending order. Click an Email to display its content. There are several email options and filters available.

6.1 Select Emails

The "Responsive Design" allows access to the email archive via web browser from the PC, smart phone or tablet.

- **Please note that the maximum number of messages you can select is 500.**
- By touching the respective e-mails for a longer time, you can select one or more messages at your Smartphone or Tablet.
- You can select messages by clicking on the checkbox or by holding the SHIFT key on your computer (see Multiple Selection for details).

6.2 Email Status

The colour of the "circle icon" next to a message in the email list indicates its archiving status. By clicking the status icon, you can display status details at the bottom of the window.

1. Status = Orange
 - a) Final archiving in X days X hours X minutes X seconds

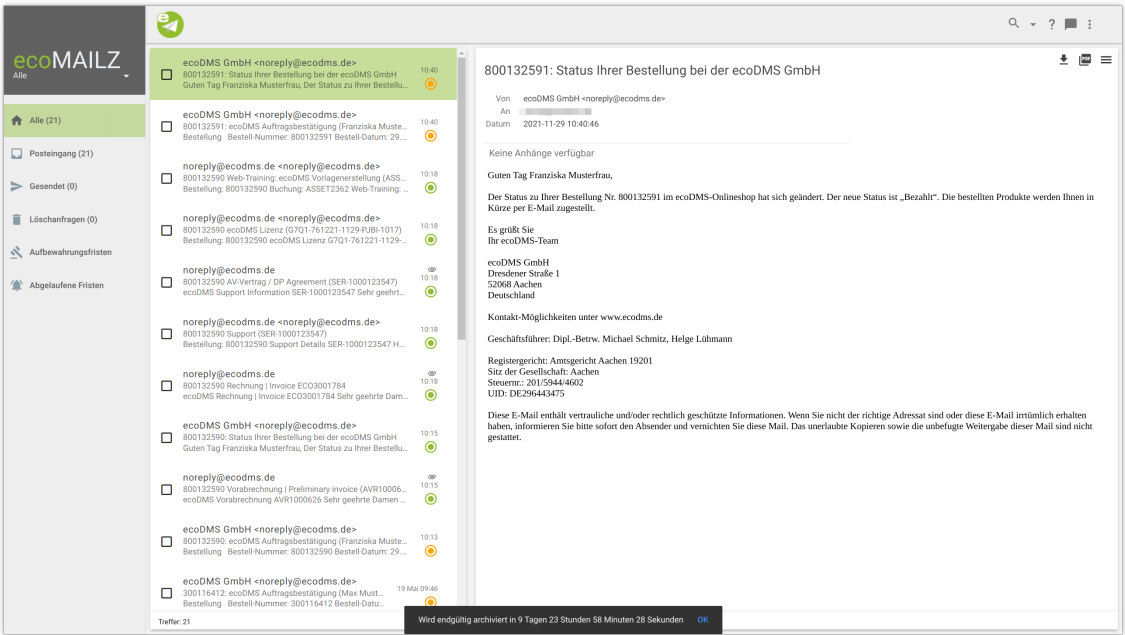


Figure 6.1: Status Details - Orange

2. Status = Red

a) Final deletion in X days X hours X minutes X seconds

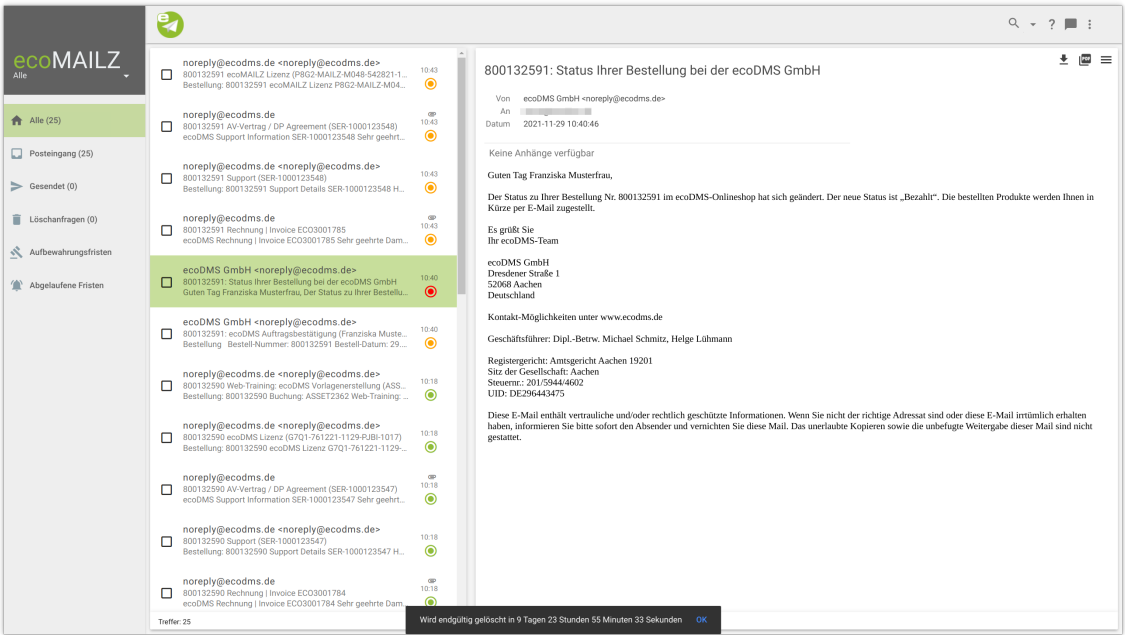


Figure 6.2: Status Details - Red

3. Status = Green

a) Finally archived

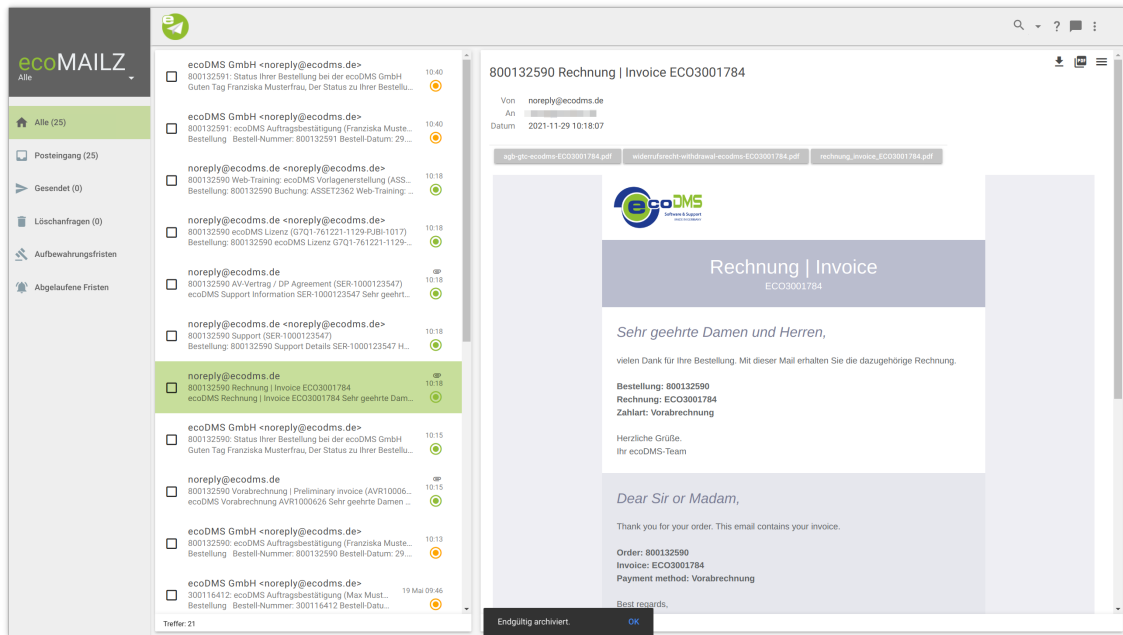


Figure 6.3: Status Details - Green

4. Status = Grey

a) Erase request sent

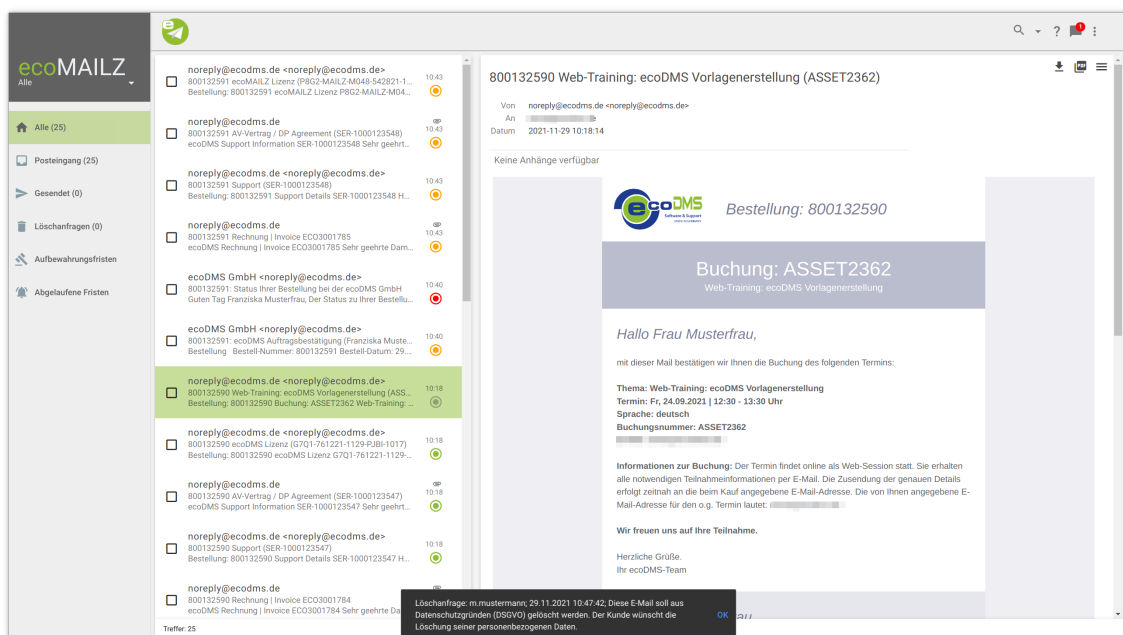


Figure 6.4: Status Details - Grey

5. Status = Black

a) Erase request approved. Email erased. Erase log saved.

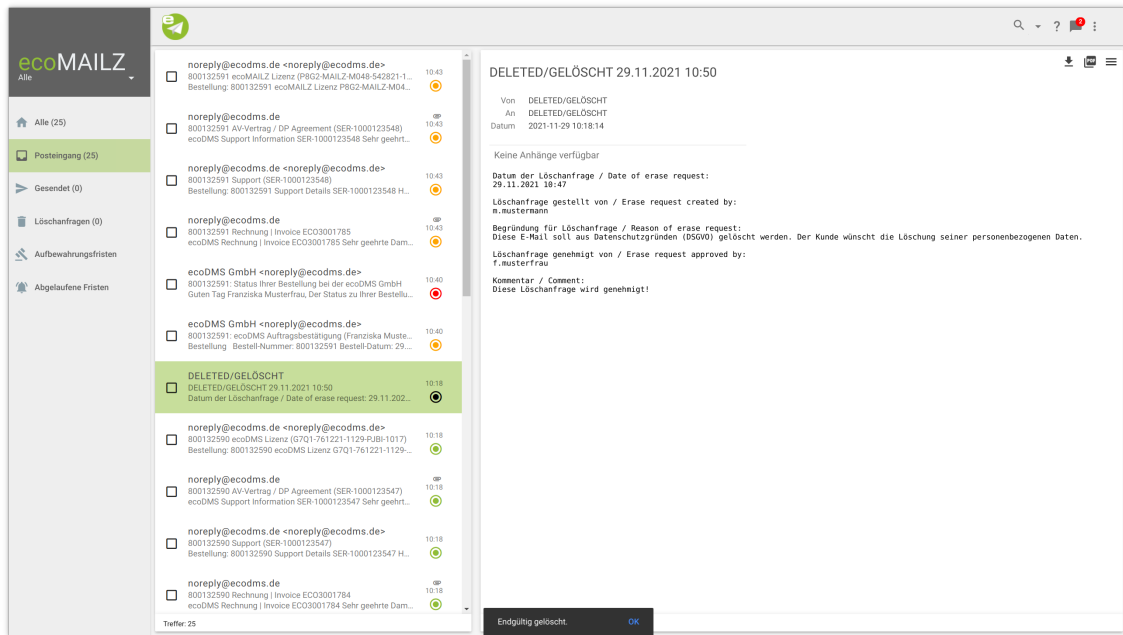


Figure 6.5: Status Details - Black

6.3 Load External Resources

By default, ecoMAILZ does not load external resources, such as linked images, which may be contained in Emails. When viewing the message, you can load and display the external resources as an option. To do so, complete the following steps:

1. Select the email in the ecoMAILZ list.
 - a) Desktop-PC-Screen: The selected message in the list is highlighted in green.
2. Click the "Load External Resources" button below the email heading.
3. ecoMAILZ now loads the external resources once for the active user and for selected Emails.

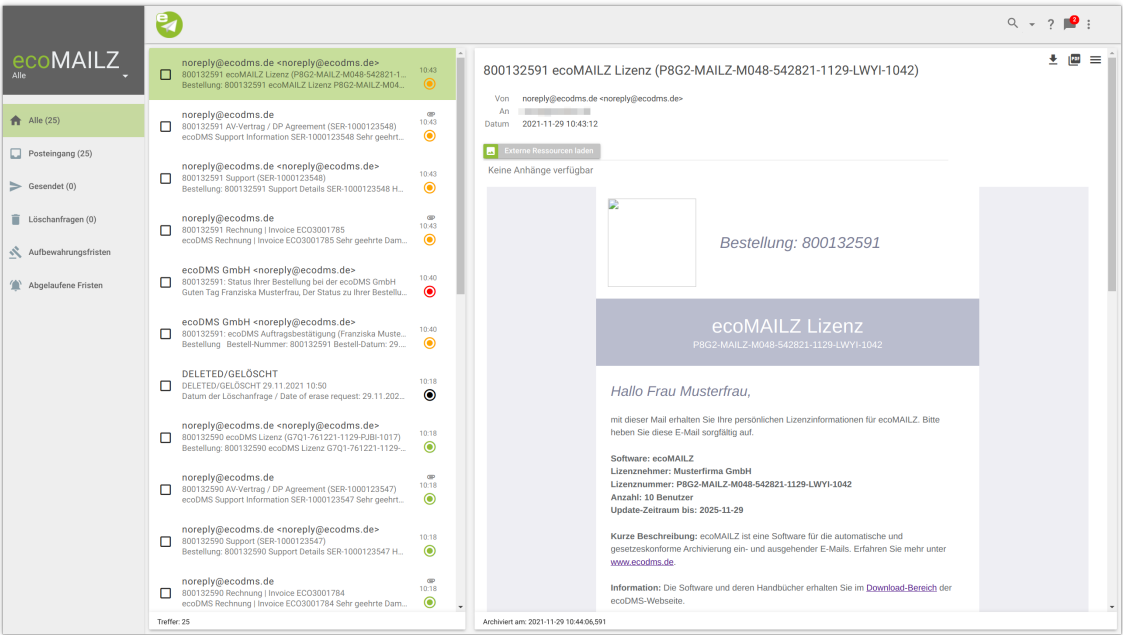


Figure 6.6: Email Options - Loading External Resources

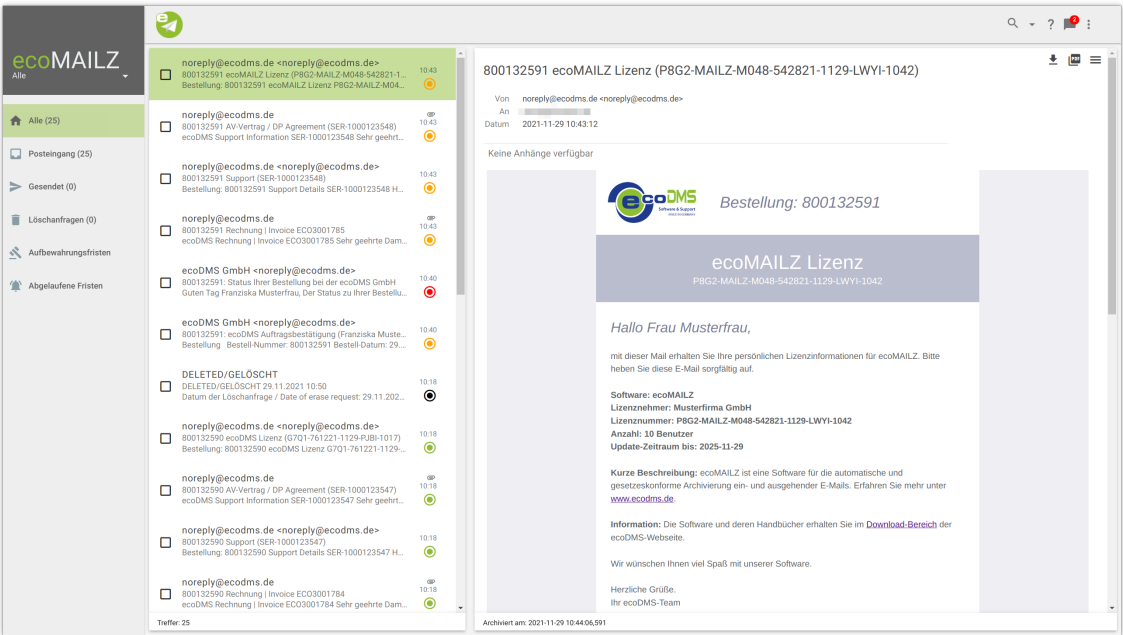


Figure 6.7: Email Options - Loaded External Resources

6.4 Download Attachments

- In the email list, attachments are identified by a green bracket icon next to the date.
- The target folder of the download depends on the configuration of your browser settings (e.g. Downloads, Desktop)

If an email contains attachments, these are displayed as individual links for download.

1. Select the email
2. Desktop/PC/Screen: The selected message in the list is highlighted in green.
3. Click the attachment below the email header.
4. The file is downloaded.

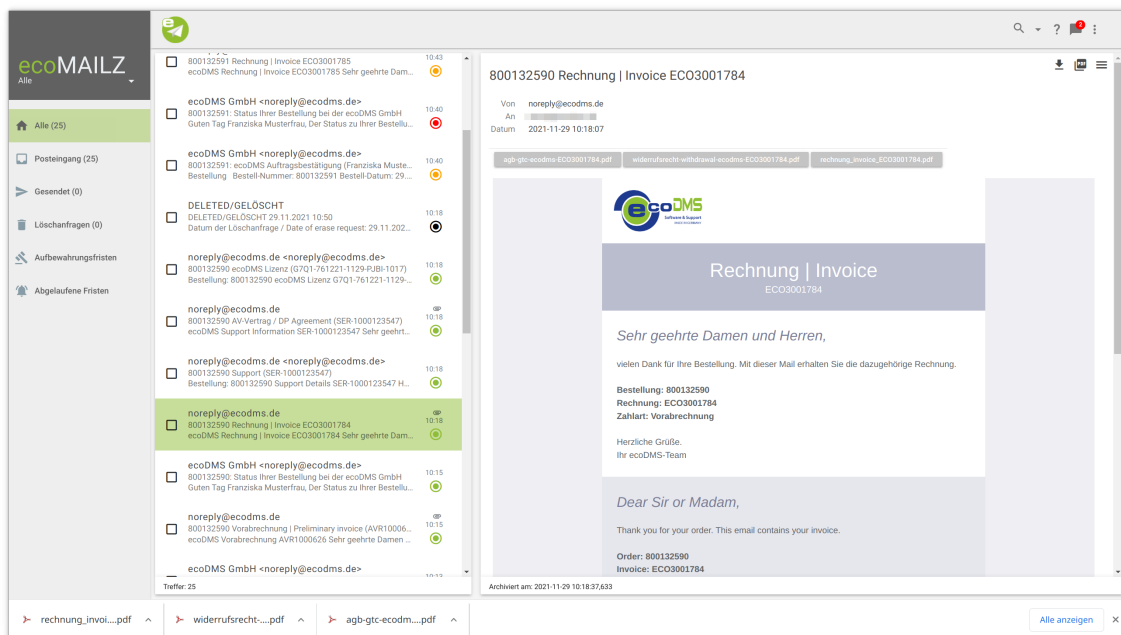


Figure 6.8: Email Options - Download Attachments (here: Chrome Browser)

6.5 Download

- The target folder of the download depends on the configuration of your browser settings (e.g. Downloads, Desktop)
- The emails download in the original format, including any attachments.

To download an entire Email, complete the following steps:

1. Select the email in the ecoMAILZ list.
 - a) Desktop/PC/Screen: The email is highlighted in green.
2. Click the "download" icon in the message (arrow down).
 - a) The icon is located at the top right of the main window of the displayed Email.
3. The email is downloaded.

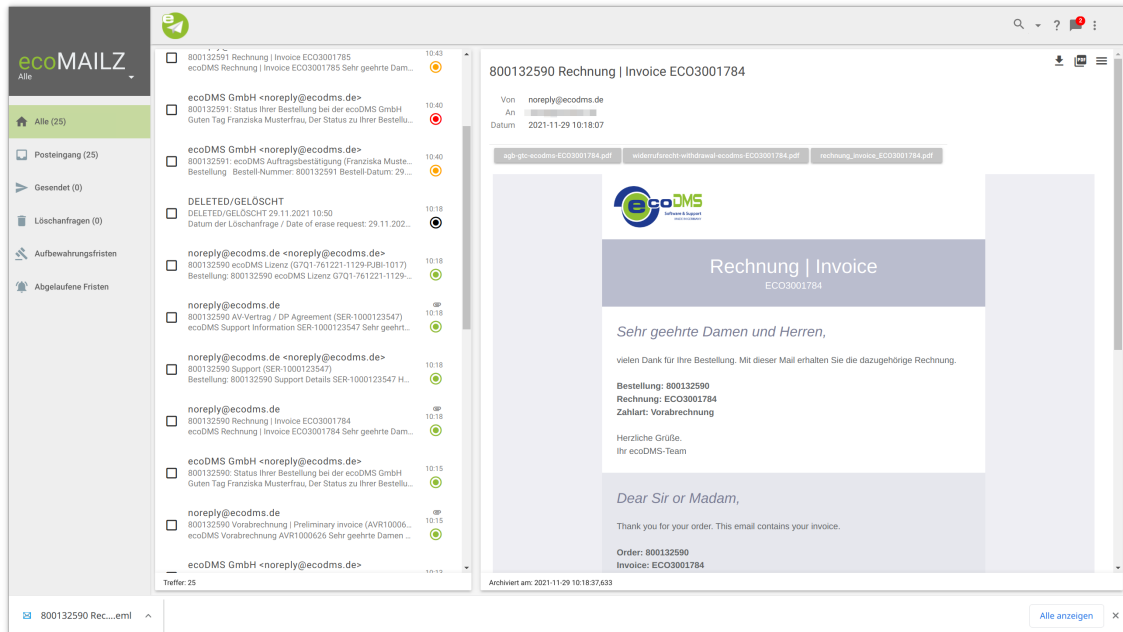


Figure 6.9: Email Options - Download Email

6.6 Download (PDF)

- The target folder of the download depends on the configuration of your browser settings (e.g. Downloads, Desktop)

To download an Email as PDF/A3 file, complete the following steps:

1. Select the email in the ecoMAILZ list.
 - a) Webclient on PC: The selected message in the list is highlighted in green.
2. Click the "Download (PDF)" icon in the message.
 - a) The icon is located at the top right of the main window of the displayed Email.

- The message and any attachments are converted to PDF/A-3 format, downloaded and stored in the default target folder for downloads. 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).

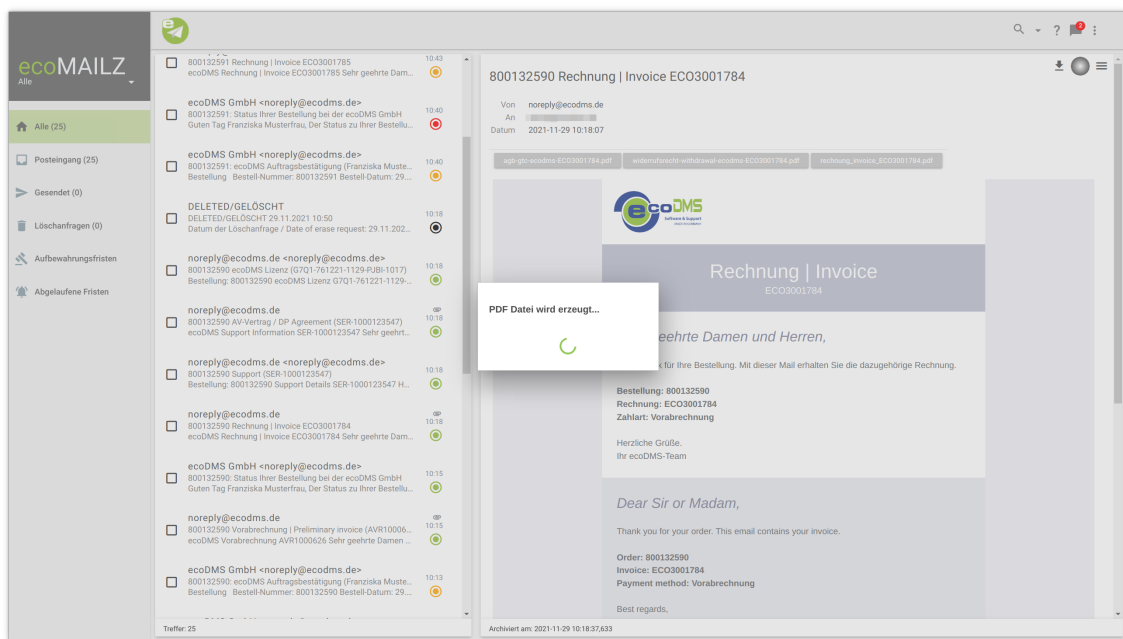


Figure 6.10: E-Mail Options - Download Email as PDF (here: Chrome Browser)

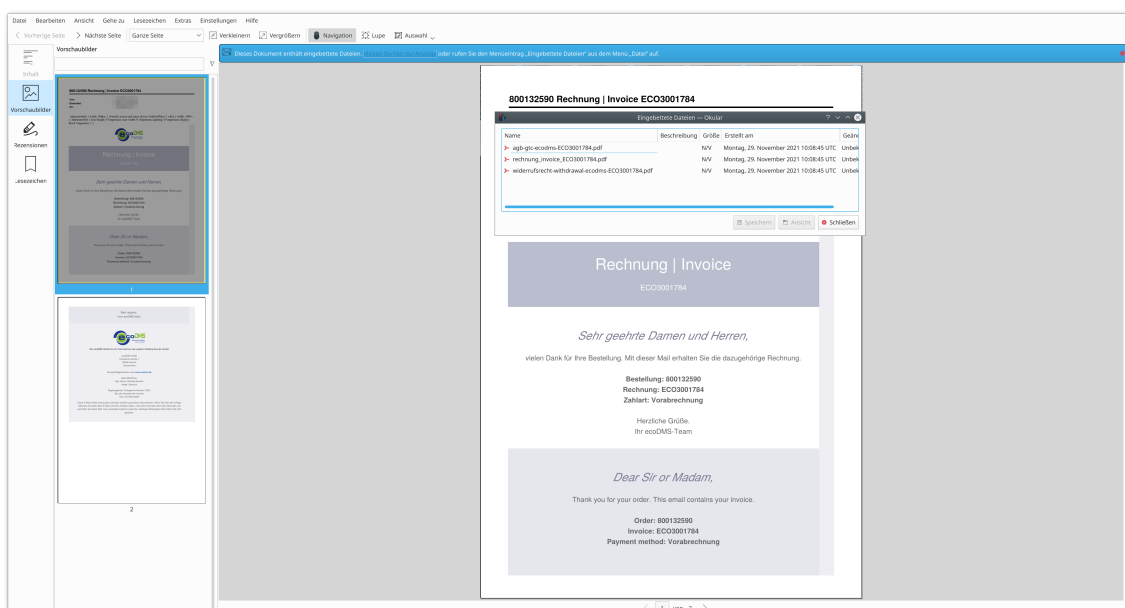


Figure 6.11: Display PDF/A-3 File with Attachments in Viewer (here: Ocular)

6.7 Read Aloud

- The language / text recognition depends on your configured browser settings (e.g. German, English...).
- Switch on the sound of your device (i.e. PC, smart phone, tablet...).

In some browsers ecoMAILZ can read aloud the readable contents of a message. To have an Email read aloud, complete the following steps:

1. Select the email in the ecoMAILZ list.
 - a) Desktop-PC-Screen: The selected message in the list is highlighted in green.
2. Click the menu icon in the message. The icon is located at the top right of the main window of the displayed Email.
3. Select the "Read aloud" function.
4. ecoMAILZ now reads aloud the readable Email text.
5. You can stop the process by clicking the "Cancel Read Aloud" button.

7 Retention Periods + Erasure Processes

This chapter explains the various features relating to retention periods and erasure processes (such as retention periods, erasure requests, etc.).

7.1 Skip Review Deadline

- Per default all Emails are downloaded according to the adapter settings and are saved in ecoMAILZ with the status "orange" (orange = "To be finally archived in X days, X hours, X minutes, X seconds").
- To fulfil the legal requirements of Email archiving and simultaneously exclude Emails from the archive that are not subject to archiving requirements, ecoMAILZ works with a two-step archiving concept. For example, you can exclude private Emails within the configured review deadline from final archiving.
- The review deadline therefore initially applies to each archived message. You can skip the review deadline of a selected message. In this case the message is immediately transferred to the archive and finally archived without respecting the review deadline.
- Before final archiving, the message status in the ecoMAILZ is orange.
- If you click the orange status icon of a message, the remaining review deadline is displayed.
- **You can only skip the review deadline of messages with the status "orange".**

1. Select the email in the ecoMAILZ list.
 - a) Desktop-PC-Screen: The selected message in the list is highlighted in green.
2. Click the menu icon in the message. The icon is located at the top right of the main window of the displayed Email.
3. Select the "Skip review deadline" function.
4. the email receives the status "green" and is then stored irrevocably in ecoMAILZ Archive.

7.1.1 Multiple Selection

- You can only skip the review deadline of messages with the status "orange".
 - Emails with a different status are not included.
- The selection and processing of large data volumes may take some time.

Use multiple selection to select several Emails simultaneously to skip the review deadline. To do so, complete the following steps:

1. Check the messages for which you want to execute the function.
2. You can also select multiple messages by holding down the SHIFT key.
 - a) To do so, select a message by clicking the checkbox.
 - b) Now hold down the SHIFT key and mark the last Email you want to select with a checkbox.
 - c) ecoMAILZ now selects all messages from the first to the last marker.
3. ecoMAILZ displays the multiple selection above the list with a menu icon in the right hand corner of the row.
4. Select the "Skip Review Deadline" menu item.
5. ecoMAILZ now applies the function to all selected messages whose status is "orange".

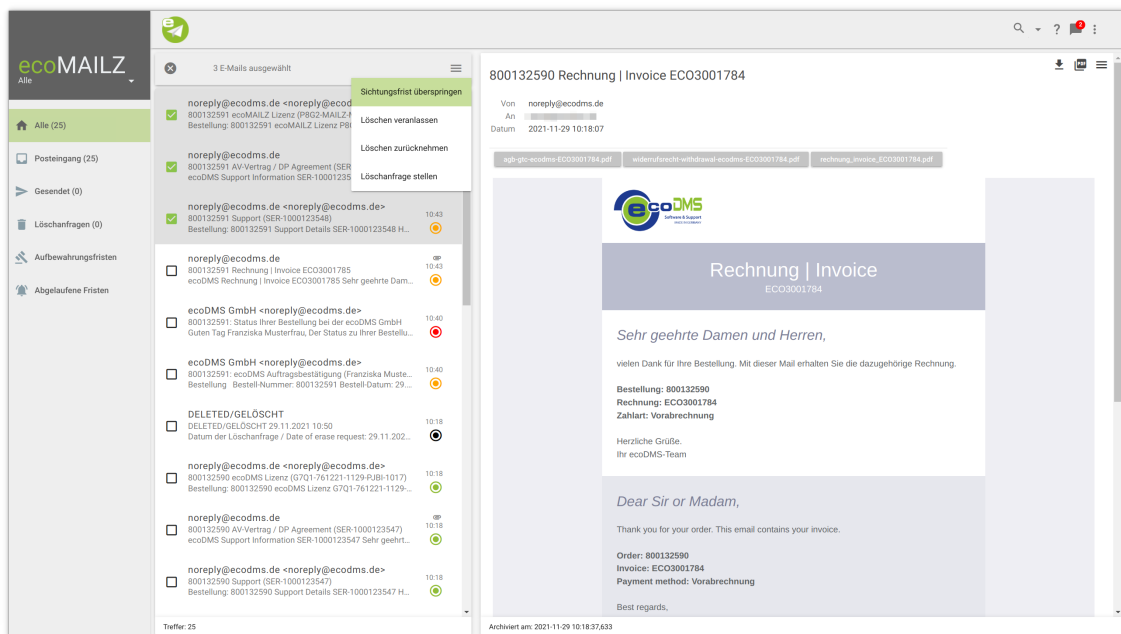


Figure 7.1: Multiple Selection - Skip Review Deadline

7.2 Mark for Delete

- Per default all Emails are downloaded according to the adapter settings and are saved in ecoMAILZ with the status "orange" (orange = "To be finally archived in X days, X hours, X minutes, X seconds").
- To fulfil the legal requirements of Email archiving and simultaneously exclude Emails from the archive that are not subject to archiving requirements, ecoMAILZ works with a two-step archiving concept. For example, you can exclude private Emails within the configured review deadline from final archiving.
- The review deadline therefore initially applies to each archived message. If necessary, you can delete a selected Email before it is finally archived. In this case the message is removed irrevocably after the configured review deadline expires.
- **You can only delete messages with the status "orange".**
 - After the review deadline has expired, you can no longer remove Emails from the archive. The "Delete" function is no longer available in this case.

To delete a message from the archive, complete the following steps:

1. Select the email in the ecoMAILZ list.
 - a) Desktop-PC-Screen: The selected message in the list is highlighted in green.
2. Click the menu icon in the message. The icon is located at the top right of the main window of the displayed Email.
3. Select the "Delete" function.
4. The e-mail is prepared for deletion. To do so, the status is set to "red".
 - a) If you click the red status icon of the message, ecoMAILZ displays the remaining time until the message is finally deleted. During this period, you can also undo the deletion process with the "Undo Delete" function.

7.2.1 Multiple Selection

- ecoMAILZ now applies the function to all selected messages whose status is "orange".
 - Emails with a different status are not included.
- The selection and processing of large data volumes may take some time.

Using multiple selection, you can delete several Emails simultaneously. To do so, complete the following steps:

1. Check the messages for which you want to execute the function.
2. You can also select multiple messages by holding down the SHIFT key.
 - a) To do so, select a message by clicking the checkbox.

- b) Now hold down the SHIFT key and mark the last Email you want to select with a checkbox.
- c) ecoMAILZ now selects all messages from the first to the last marker.
3. ecoMAILZ displays the multiple selection above the list with a menu icon in the right hand corner of the row.
4. Select the "Delete" menu item.

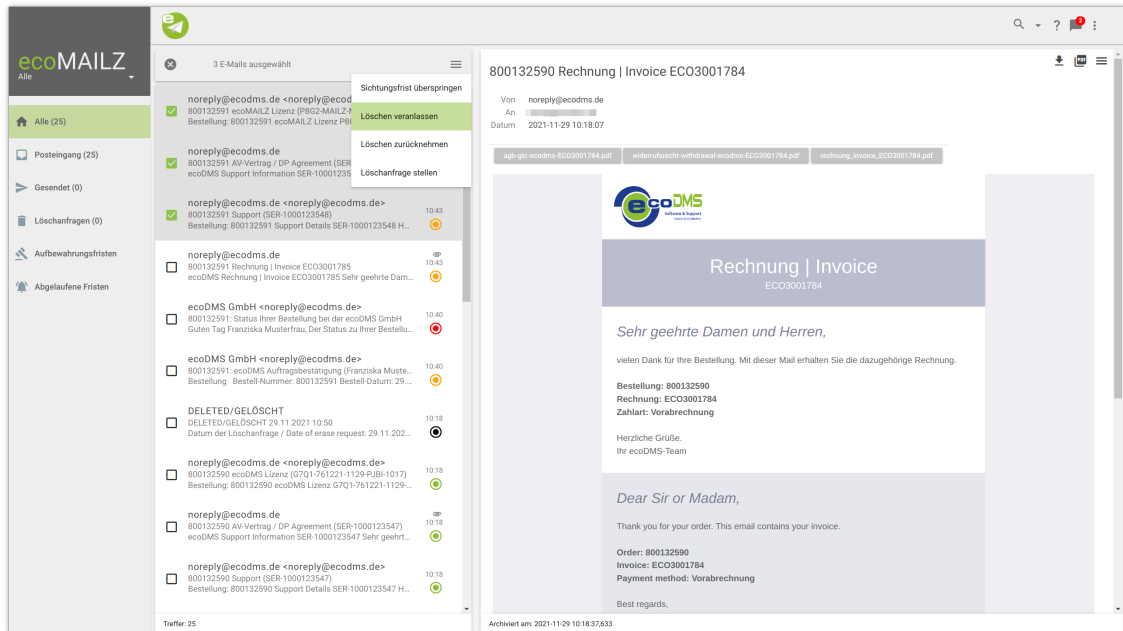


Figure 7.2: Multiple Selection - Delete

7.3 Undo Delete

- If you inadvertently marked a message for deletion (status = red), you can undo this process within the remaining review deadline.
- You can only undo a deletion request for messages with a "red" status.
 - Emails with a different status are not included.

1. Select the email in the ecoMAILZ list.
 - a) Desktop-PC-Screen: The selected message in the list is highlighted in green.
2. Click the menu icon in the message. The icon is located at the top right of the main window of the displayed Email.
3. Select the "Undo Delete" function.
4. the email status is set to "orange".

- a) Mouseover the orange status icon of the message to display the remaining review deadline until the message is finally archived.

7.3.1 Multiple Selection

- ecoMAILZ now applies the function to all selected messages whose status is "orange".
 - Emails with a different status are not included.
- The selection and processing of large data volumes may take some time.

Using multiple selection, you can undo the deletion of several Emails simultaneously. To do so, complete the following steps:

1. Check the messages for which you want to execute the function.
2. You can also select multiple messages by holding down the SHIFT key.
 - a) To do so, select a message by clicking the checkbox.
 - b) Now hold down the SHIFT key and mark the last Email you want to select with a checkbox.
 - c) ecoMAILZ now selects all messages from the first to the last marker.
 - i. Please note that the selection and processing of large data volumes may take some time.
3. ecoMAILZ displays the multiple selection above the list with a menu icon in the right hand corner of the row.
4. Select the "Undo Delete" menu item.
5. ecoMAILZ now applies the function to all selected messages whose status is "red".
 - a) Emails with a different status (orange or green) are not included.

7.4 Send Erase Request

- Users with a permission to send erase requests (refer to the chapter "User Management - Create New User") can request the erasure of Emails that have been finally archived (refer to chapter "Basics" for more details).
- The prerequisite for this is, that...
 - the email is finally archived and has the "green" status.
 - the user has the necessary permission to send an erase request.

1. Select the email in the ecoMAILZ list
 - a) (Desktop-PC-Screen: The selected message in the list is highlighted in green.)

2. Click the menu icon in the message. The icon is located at the top right of the main window of the displayed Email.
3. Select the "Send Erase Request" function.

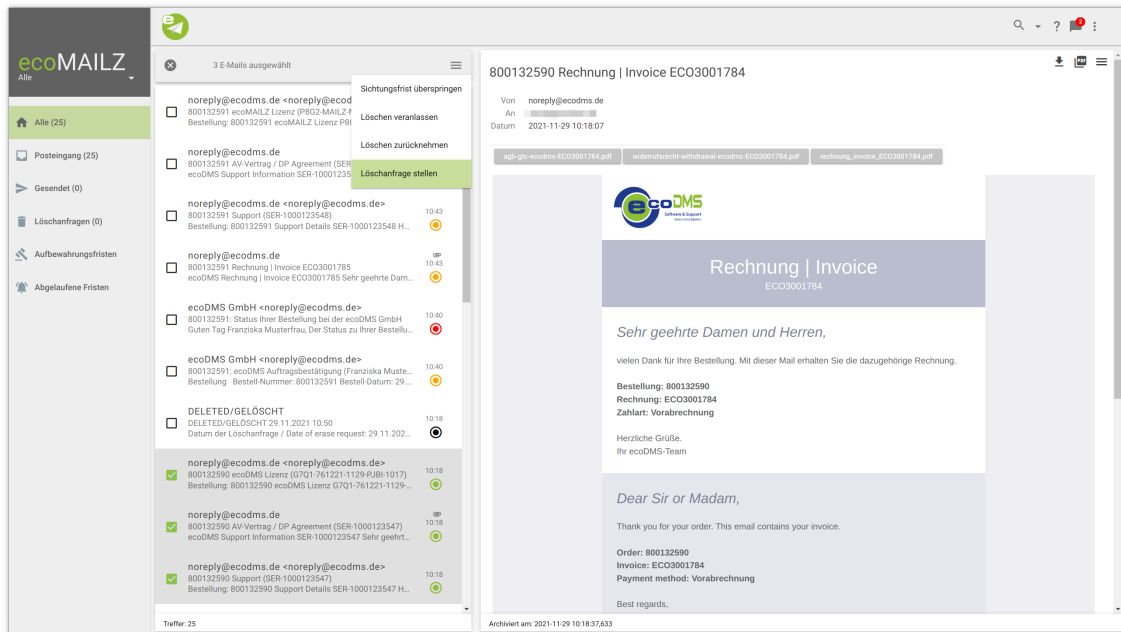


Figure 7.3: Email Options - Send Erase Request (Current Status: Green)

4. A new dialogue box opens.
 - a) Enter a meaningful justification for the erasure process.
 - i. The justification displays in the message window and is saved in the system when the erasure request is approved.
 - b) Confirm your entry with "OK" or abort the process with "Cancel".

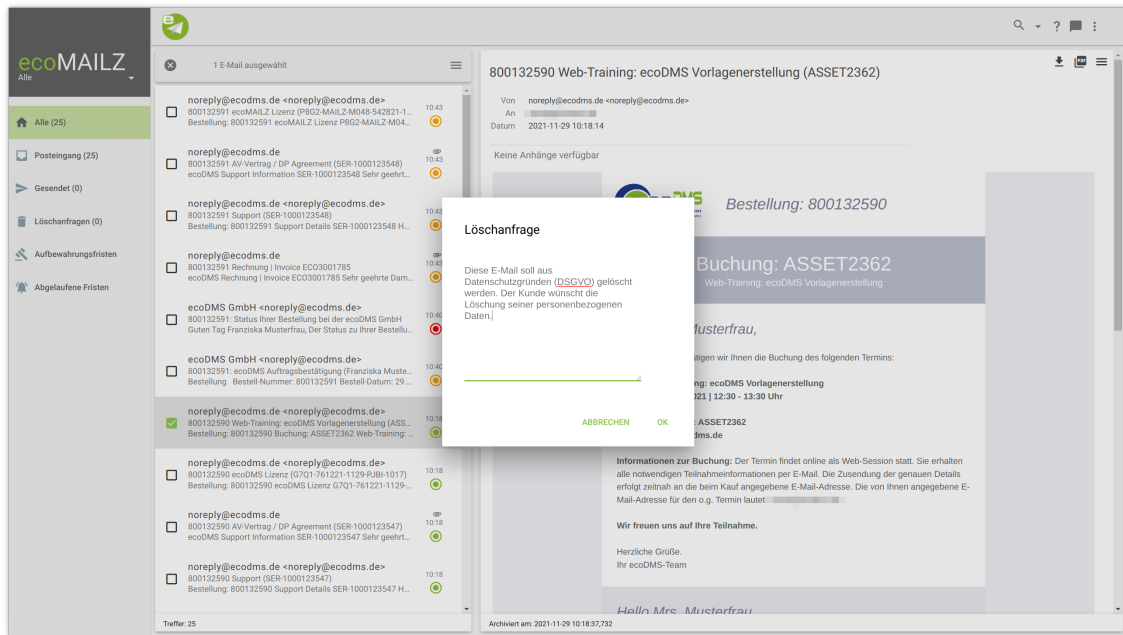


Figure 7.4: Email Options - Send Erase Request (Here: Example Justification for the Erase Request)

5. the email status is set to "grey".

a) If you click the grey status icon of the message, the following information displays:

- i. Username
- ii. Date
- iii. Time
- iv. Justification for the erase request

6. The "Notifications" window (header) displays the information about the erase request.

a) The number of available, unread notifications displays in red in the speech bubble in the header.

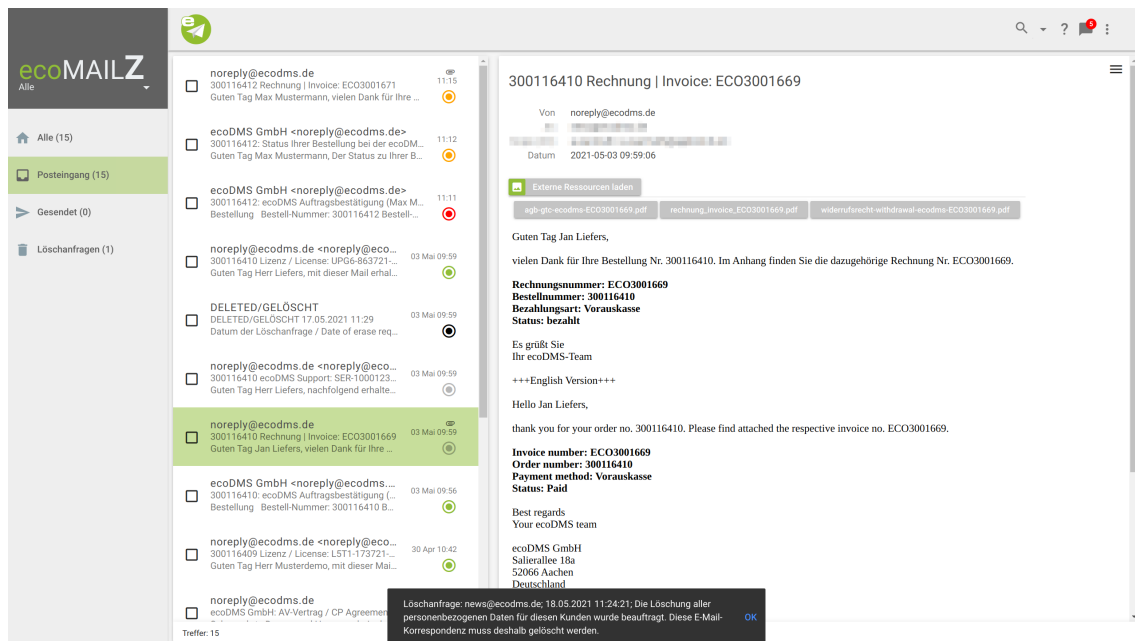


Figure 7.5: Email Options - Send Erase Request (Here: Grey - Status Information Display)

7. Users with a permission to answer this erase request can now also view the email in the "Erase Requests" folder.

- a) The message can only be viewed by those users who, in addition to the permission to answer erase requests, also have the permission to read the respective message.

7.4.1 Multiple Selection

- Please note that selecting and editing large amounts of data may take some time.
- ecoMAILZ applies the function to all selected messages whose status is "green".
 - Emails with a different status are not included.

Using multiple selection, you can send an erase request for the simultaneous erasure of multiple Emails (500 max.). To do so, complete the following steps:

1. Check the messages for which you want to send an erase request. The message status must be "green".
 - a) Alternatively, you can also select multiple messages with the SHIFT key.
 - i. To do so, select a message via checkbox.
 - ii. Now press and hold the SHIFT key and check the last Email you want to select.
 - iii. ecoMAILZ now selects all messages from the first to the last one you checked.
2. ecoMAILZ displays the multiple selection above the list with a menu icon in the right hand corner of the row.
3. Select the "Send Erase Request" menu item.
4. Then follow the steps from the chapter "Send Erase Request" from step 4 onwards.

7.5 Approve Erase Request

- Users with a permission to respond to erase requests (refer to the chapter "User Management - Create New User") can do so by approving or rejecting the requests (refer to chapter "Basics" for more details).
- The prerequisite for this is, that...
 - an erase request was made for this Email.
 - the email has the "grey" status.
 - the email was selected in the "Erase Requests" folder and not in the "Standard Overview".

1. Select the email you want to approve in the "Erase Requests" folder.
 - a) (Desktop-PC-Screen: The selected message in the list is highlighted in green.)
2. Click the menu icon in the message. The icon is located at the top right of the main window of the displayed Email.
3. Select the "Approve Erase Request" function
4. A new dialogue box opens.
 - a) Enter a meaningful justification for the approval of the erase request.
 - i. The justification displays in the messages window and is also written to the erase log.
 - b) Confirm your entry with "OK" or abort the process with "Cancel".

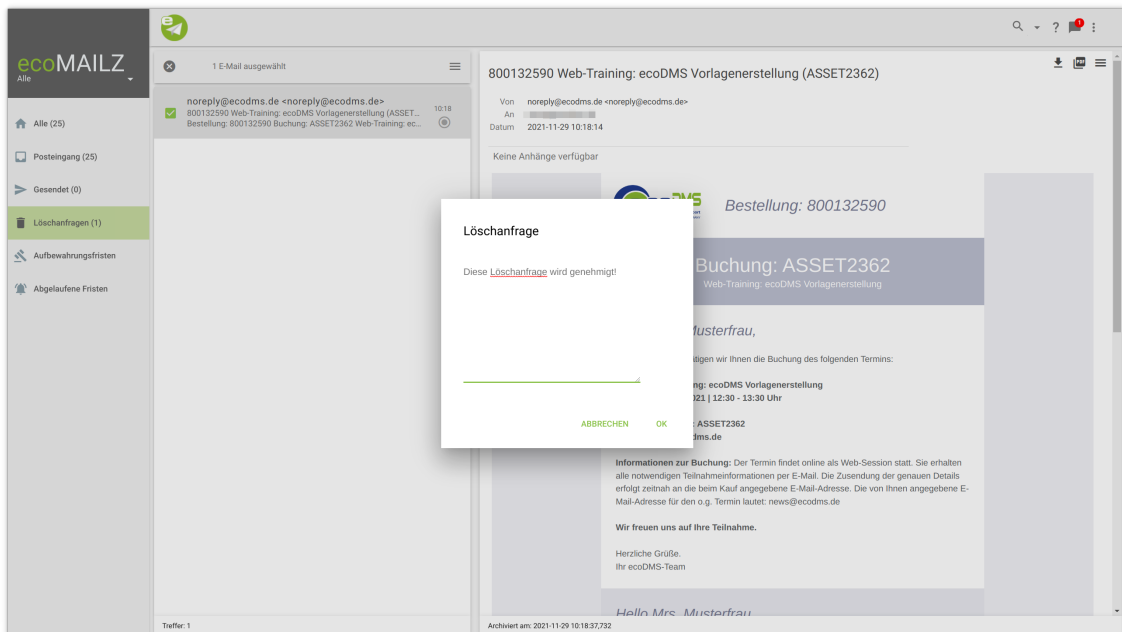


Figure 7.6: E-Mail Options - Approve Erase Request (Here: Example Justification for the Approval)

5. The message disappears from the "Erase Requests" folder.

In the Standard Overview, the message is still displayed as an entry. However, this entry now has an erase flag. The actual message content no longer exists. Instead, the flag displays the justification with date and name of the authorised person.

6. the email status is set to "black".
7. The "Messages" window (header) displays the information about the approval of the erase request.
 - a) The number of available, unread messages displays in red in the speech bubble of the header.

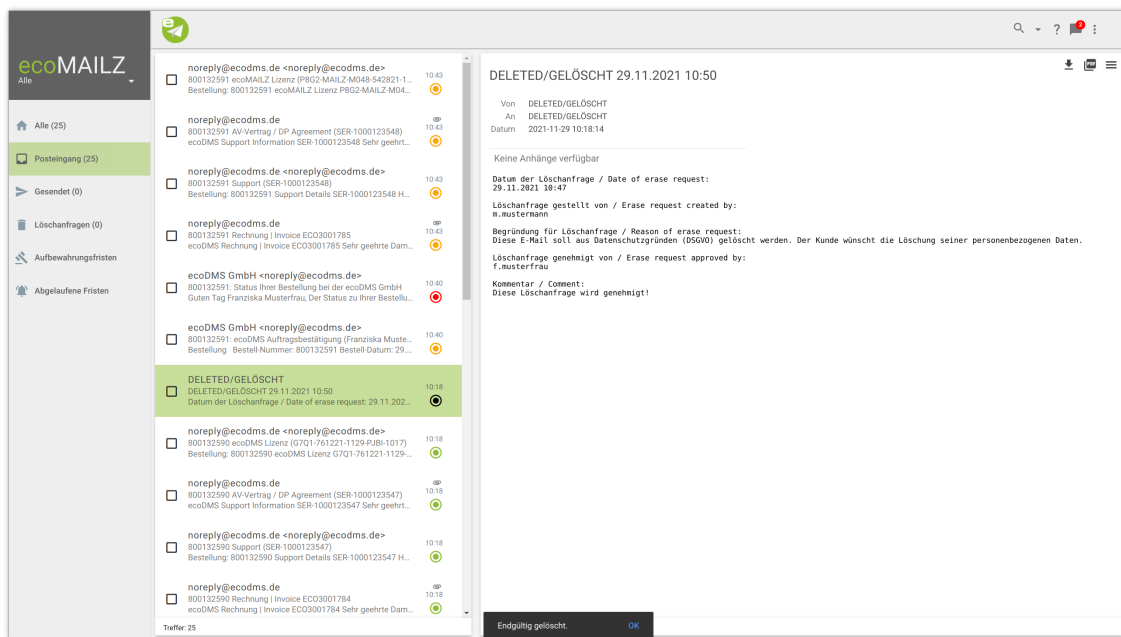


Figure 7.7: Email Options - Erase Request Approved (Here: Status "Black" and Erase Flag)

7.5.1 Multiple Selection

- Please note that selecting and editing large amounts of data may take some time.
- ecoMAILZ applies the function to all selected messages whose status is "grey".
 - Emails with a different status are not included.

Using multiple selection, you can approve an erase request for several Emails simultaneously (500 max.). To do so, complete the following steps:

1. In the "Erase Requests" folder, check the messages you want to select. The message status must be "grey".
 - a) Alternatively, you can also select multiple messages with the SHIFT key.
 - i. To do so, select a message via checkbox.

- ii. Now press and hold the SHIFT key and check the last Email you want to select.
 - iii. ecoMAILZ now selects all messages from the first to the last one you checked.
2. ecoMAILZ displays the multiple selection above the list with a menu icon in the right hand corner of the row.
3. Select the "Approve Erase Request" menu item.
4. Then follow the steps from the chapter "Approve Erase Request" from step 4 onwards.

7.6 Reject Erase Request

- Users with a permission to respond to erase requests (refer to the chapter "User Management - Create New User") can do so by approving or rejecting the requests (refer to chapter "Basics" for more details).
- The prerequisite for this is, that...
 - an erase request was made for this Email.
 - the email has the "grey" status.
 - the email was selected in the "Erase Requests" folder and not in the "Standard Overview".

1. Select the email you want to reject in the "Erase Requests" folder.
 - a) (Desktop-PC-Screen: The selected message in the list is highlighted in green.)
2. Click the menu icon in the message. The icon is located at the top right of the main window of the displayed Email.
3. Select the "Reject Erase Request" function.
4. A new dialogue box opens.
 - a) Enter a meaningful justification for the rejection of the erase request.
 - i. The justification displays in the message window.
 - b) Confirm your entry with "OK" or abort the process with "Cancel".
5. The message disappears from the "Erase Requests" folder.
 - a) In the Standard Overview, the message continues to be displayed as an entry.
6. the email status changes to "green".
7. The "Messages" window (header) displays the information about the rejection of the erase request.
 - a) The number of available, unread messages displays in red in the speech bubble of the header.

7.6.1 Multiple Selection

- Please note that selecting and editing large amounts of data may take some time.
- ecoMAILZ applies the function to all selected messages whose status is "grey".
 - Emails with a different status are not included.

Using multiple selection, you can reject an erase request for several Emails simultaneously (500 max.). To do so, complete the following steps:

1. In the "Erase Requests" folder, check the messages you want to select. The message status must be "grey".
 - a) Alternatively, you can also select multiple messages with the SHIFT key.
 - i. To do so, select a message via checkbox.
 - ii. Now press and hold the SHIFT key and check the last Email you want to select.
 - iii. ecoMAILZ now selects all messages from the first to the last one you checked.
2. ecoMAILZ displays the multiple selection above the list with a menu icon in the right hand corner of the row.
3. Select the "Reject Erase Request" menu item.
4. Then follow the steps from the chapter "Reject Erase Request" from step 4 onwards.

7.7 Retention Periods

- **For more information about this topic, refer to chapter 3.9 in this manual.**
- This item only displays if the user has the permission to answer erasure requests.
- The retention period overview only displays emails for which the selected period has the highest priority
- Inactive retention periods are not displayed
- The overview displays emails per retention period.
- Only emails display for which the user has permission.
 - If a user can answer erase requests regardless of permissions, ecoMAILZ displays all emails.
- Retention periods only apply to finally archived emails (status icon = green).
- After a retention period has expired, the system either automatically erases the emails or the user (with the permission to answer erase requests) erases them manually.
- Use search terms to assign emails to a retention period.
- **Erase automatically enabled: Finally archived emails that match the criteria of a retention period are automatically erased after the specified period and cannot be restored.**
- **Erase manually: Finally archived emails that match the criteria of a retention period can be erased manually after the specified period and cannot be restored.**
- In ecoMAILZ, users have customised quick filters for displaying emails and their retention periods.
- The detected retention periods are also displayed in form of a chip in the email details. This means that the retention period is also visible in the email. In addition to the name of the retention period, the chips also indicate whether the email should be manually or automatically erased from the system after the retention period has expired.

1. Click the "Retention Periods" filter to display emails with a retention period
 - a) Use the search box to switch between the available periods
 - b) The retention periods are sorted by priority, with the most important deadline at the top
2. If you select an email, the email details contain coloured chips with retention periods

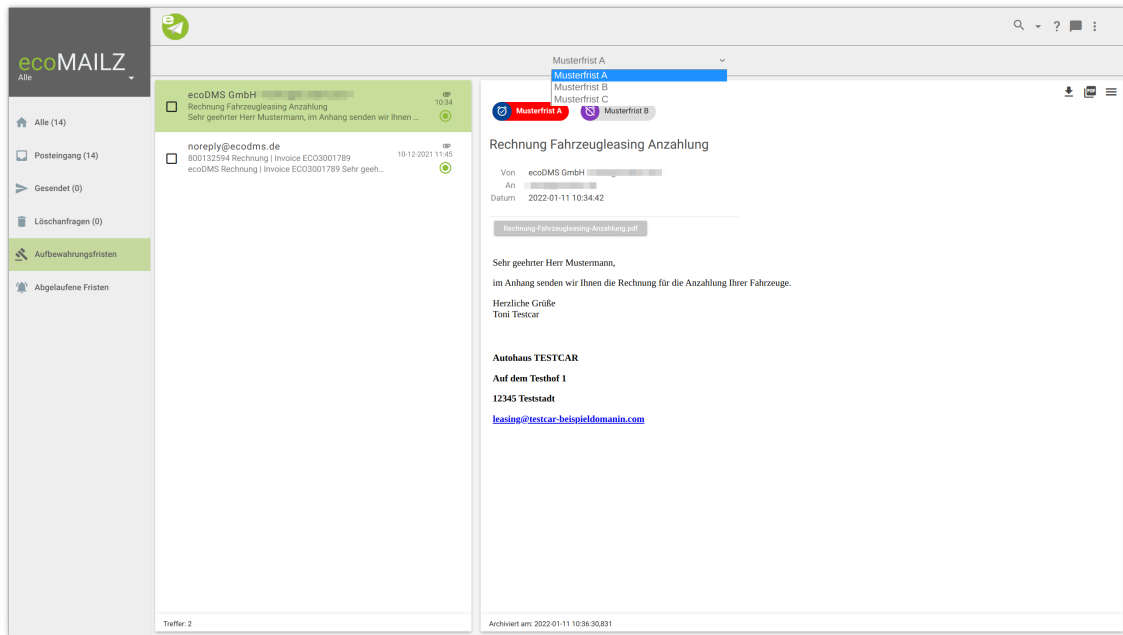


Figure 7.8: Retention Periods - Filters in the Search Box

7.8 Retention Periods

- **For more information on this topic, refer to chapter 3.9 in this manual.**
- This view shows emails whose retention period has expired
- This item only displays if the user has the permission to answer erasure requests
- The "Expired Retention Period" overview only displays emails for which the selected period has the highest priority
- Moreover, the overview only displays active, manual retention periods • Only emails display for which the user has permission.
 - If a user can answer erase requests regardless of permissions, ecoMAILZ displays all emails.
- Retention periods only apply to finally archived emails (status icon = green).
- After a retention period has expired, the system either automatically erases the emails or the user (with the permission to answer erase requests) erases them manually.
- Use search terms to assign emails to a retention period.
- **Erase automatically enabled:** Finally archived emails that match the criteria of a retention period are automatically erased after the specified period and cannot be restored.
- **Erase manually:** Finally archived emails that match the criteria of a retention period can be erased manually after the specified period and cannot be restored.

1. Click the filter "Expired Deadlines" to display emails whose retention periods have expired

- a) Use the search box to switch between the available periods
 - b) The retention periods are sorted by priority, with the most important deadline at the top
2. If you select an email, the email details contain coloured chips with retention periods

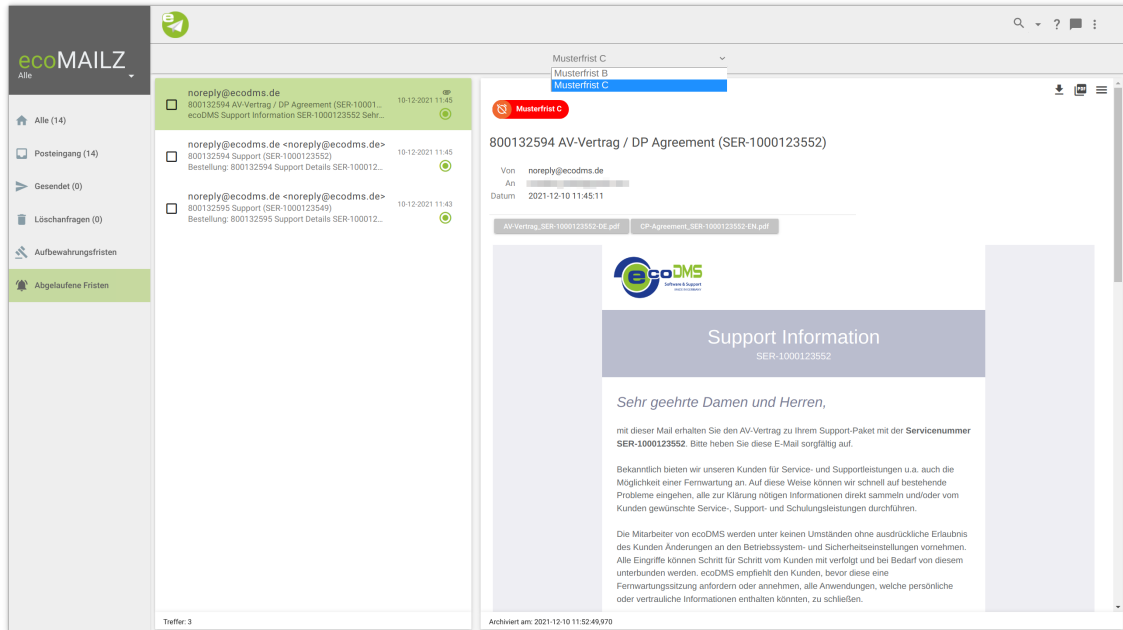


Figure 7.9: Retention Periods - Overview of Expired Retention Periods

7.8.1 Manually Erase Emails (Expired Manual Retention Period)

- After a retention period has expired, the system either automatically erases the emails or the user (with the permission to answer erase requests) erases them manually.
- If the "Erase automatically" feature is NOT assigned to a retention period, authorised users can manually erase emails from the system after the retention period has expired.
- In this case, ecoMAILZ does not generate an erasure log.
- The email is erased and cannot be restored.
- If you modify the retention period (exception: name change), you must refresh the overview before you can erase the email.
- Any modification to the retention period settings (refer to chapter 3.9) only displays if you click the overview again.
 - For example, if you disable a retention period and another user is currently in the overview for this retention period, the period is only removed if you click the "Retention period" overview again.

To erase an email with an expired retention period from the archive, complete the following steps:

1. Click the filter "Expired retention periods" to display emails whose retention periods have expired

- Use the search box to switch between the available periods
- The retention periods are sorted by priority, with the most important deadline at the top

2. Select the email

- If you select an email, the email details contain coloured chips with retention periods

3. Click "Erase" in the email menu

4. Confirm the warning message that this operation cannot be undone with "Yes" or cancel the operation with "No"

5. The email is erased and cannot be restored

- If you want to erase multiple emails, tick the emails in the list
- Click "Erase" in the "Multiple Selection" menu
- Confirm the warning message that this operation cannot be undone with "Yes" or cancel the operation with "No"
- The emails are erased and cannot be restored

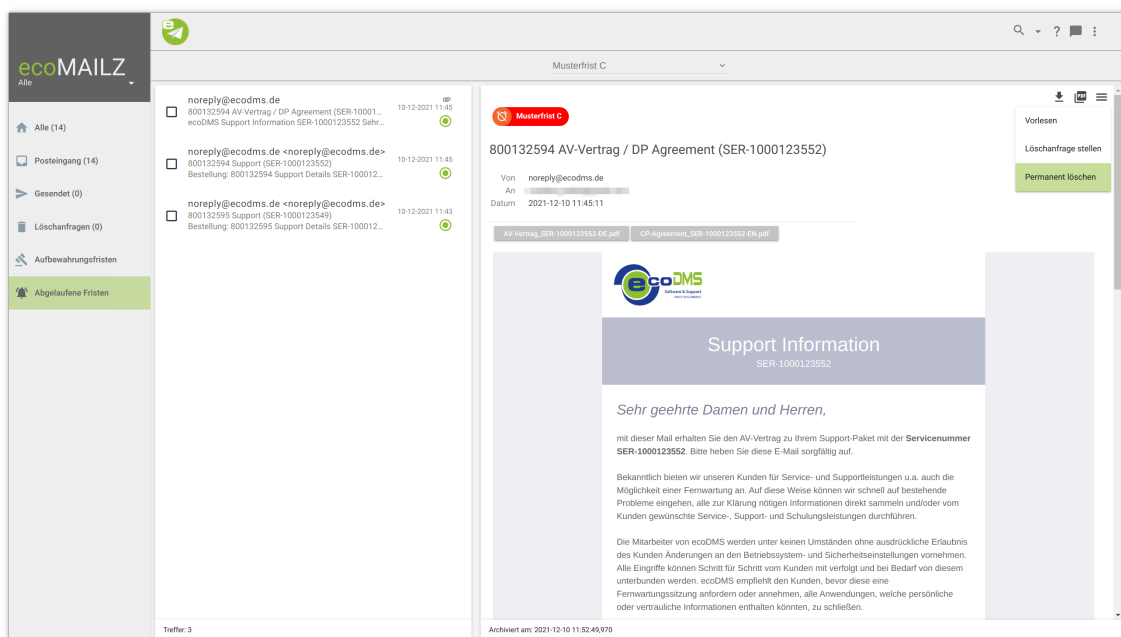


Figure 7.10: Expired Retention Periods - Erase Individual Emails

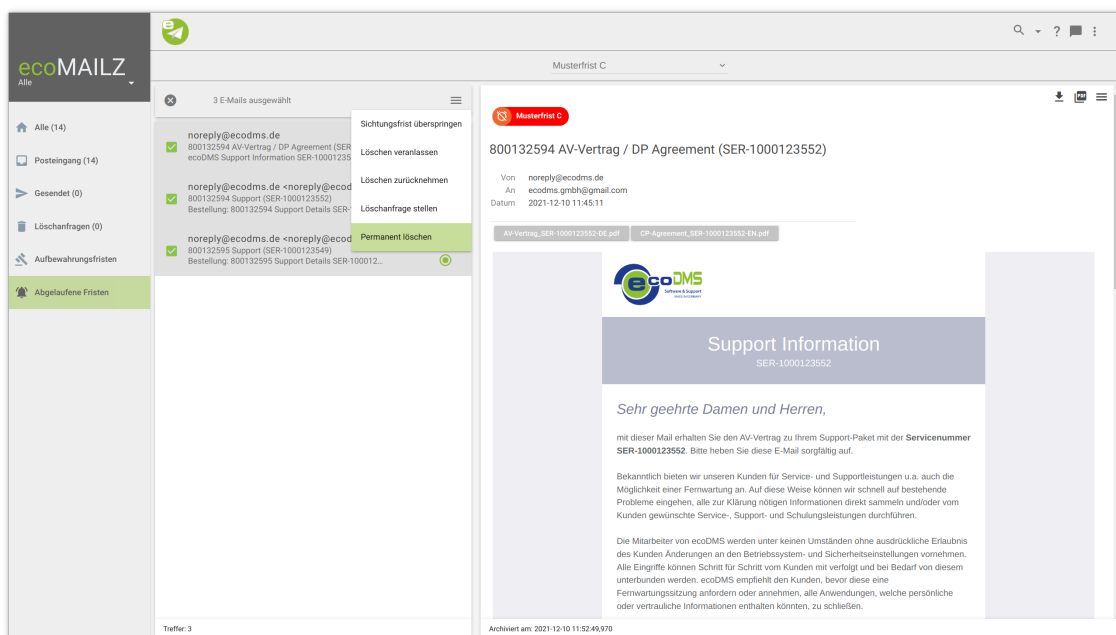


Figure 7.11: Expired Retention Periods - Erase Multiple Emails

8 Search Features

You can search archived Emails via the Webclient. To do so, there are various search and filtering options available.

- The search functions are in the upper area (header) of the Webclient and can be started by clicking the magnifying glass.
- Click the help icon (?) to the right of the search entry box to load search examples.

8.1 Search Examples

Click the help icon (?) to the right of the search entry box to load search examples.

1. Full-text search for the word "Invoice".

```
Invoice
```

2. Searches for the sender.

```
from:
```

3. Searches for the recipient.

```
to:
```

4. Searches for the subject.

```
subject:
```

5. Searches every Email in which a word starts with "Invo".

```
subject: Invo*
```

6. Searches every mail from, for example, john@doe.de or john@dowe.de

```
from: john@do?e.de
```

7. Searches every Email which has a word similar to "Doe" in the subject line.

```
subject: Doe~
```

8. Searches every Email from john@doe.com with the word "Invoice" in the subject line.

```
from: john@doe.com AND Subject: Invoice
```

9. Searches every mail from john@doe.com or service@doe.com

```
from: john@doe.com OR From: service@doe.com
```

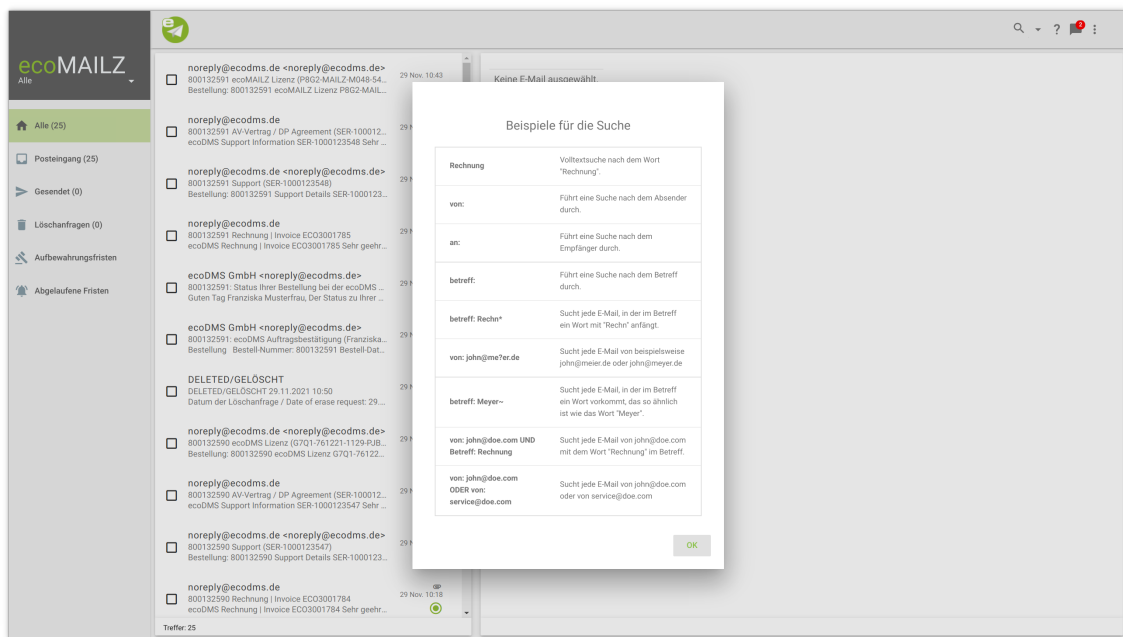


Figure 8.1: Examples for Searching Emails

8.2 Full-Text Search

Text recognition in ecoMAILZ includes the email text as well as the available, readable attachments. ecoMAILZ also indexes the partially invisible background information from the email header. Attachments are included in the full-text search, provided ecoMAILZ can read them. If the search result is an attachment, it is highlighted in colour in the email. Please note that we cannot guarantee 100 percent accuracy for the full-text search. The recognition depends on the contents and quality of your Emails and files.

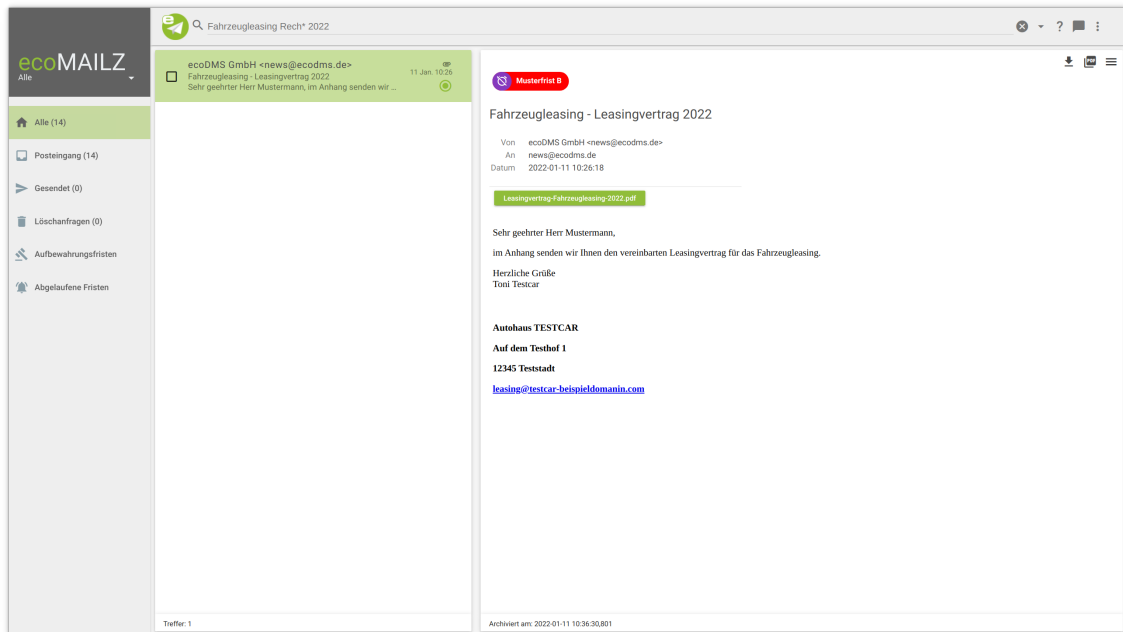


Figure 8.2: Full-Text Search - Results - Email with Recognized Attachment (Highlighted Green)

8.2.1 Simple Full-Text Search

1. Open the search box in the upper area (header) of the ecoMAILZ Webclient by clicking the magnifying glass icon.
2. Enter one or more words contained in the file you are searching for. For example:

max@mustermann.de

3. Confirm your entry with "Enter" to start the search.
 - a) ecoMAILZ displays all matches with the same notation as the words you entered in the search.
 - b) If ecoMAILZ can read the attachments, they are included in the full-text search. If the search result is an attachment, the attachment is highlighted in colour in the email.
4. Click the "X" icon next to the search box to exit the search.

8.2.2 Wildcard Search

Wildcards are placeholders and are represented by a question mark (?) or an asterisk (*).

1. Open the search box in the upper area (header) of the ecoMAILZ Webclient by clicking the magnifying glass icon.
2. Enter one or more words contained in the file you are searching for. To do so, use wildcards.
 - a) **Question mark (?):** This character replaces a letter and is used if, for example, the notation is unclear. For example:

Me?er@demomail.com

- i. In this case, the search would search for the following Email addresses: "Mejer@demomail.com", "Meier@demomail.com", "Meyer@demomail.com", "Meter@demomail.com"...
- b) **Asterisk (*)**: Enter the asterisk at the end of a search term. The asterisk signifies that more characters follow the values you entered. For example:

sample@demo*

- i. 1. In this case, the search would search for Email addresses that start with "sample@demo" and have a different ending. For example: "sample@demomail.de", "sample@demo.com", "sample@demo.de"...
3. 3. Confirm your entry with "Enter" to start the search.
 - a) ecoMAILZ displays all matches for the search that contain all specified values.
 - b) If ecoMAILZ can read the attachments, they are included in the full-text search. If the search result is an attachment, the attachment is highlighted in colour in the email.
 4. Click the "X" icon next to the search box to exit the search.

8.2.3 Fuzzy Search

This function is a "fuzzy search". If a simple full-text search does not return the required result, we recommend this search function as an alternative.

1. Open the search box in the upper area (header) of the ecoMAILZ Webclient by clicking the magnifying glass icon.
2. Enter one or more words contained in the file you are searching for. To do so, use "fuzzy logic" technology.
 - a) **1. Tilde character (~)**: Place the tilde character **at the end** of a word to perform a fuzzy search which searches for words that are similar to the entry. For example:

smit@demomal.com~

- i. The search would focus on Emails from and including "smith@demomail.com".
3. Confirm your entry with "Enter" to start the search.
 - a) ecoMAILZ displays all matches for the search that contain all specified values.
 - b) If ecoMAILZ can read the attachments, they are included in the full-text search. If the search result is an attachment, the attachment is highlighted in colour in the email.
 4. A search continues until the process is cancelled via the X icon in the search line. To reset all enabled filters, click the icon with the crossed out circle on the toolbar.

8.2.4 Boolean Operators

Use "Boolean factors" to create various operators such as AND, OR, +, - . Enter operators in capitals when searching in ecoMAILZ.

1. 1. Open the search box in the upper area (header) of the ecoMAILZ Webclient by clicking the magnifying glass icon.
2. 2. Enter one or more words contained in the file you are searching for. To do so, use "Boolean operators" technology.

- a) **OR**: Connect two words with this operator to search either for one or the other word. For example:

Sample OR Demo

- i. 1. This search entry searches for Emails that contain either the word "Sample" or the word "Demo" (or both).

- b) **NOT / -** : Use these operators if you want to search for a file which does not include a specified word. Use either the value "NOT" or the value "-". Place the minus symbol directly before the word you want to exclude. For example:

Sample NOT Demo

Sample -Demo

- i. 1. These search entries search for Emails that contain the word "Sample" but not the word "Demo".

- c) **AND / +** : These operators are used for an AND operation. The search terms connected with AND should all be contained in the file. You can either use the value "AND" or the value "+". Place the plus symbol directly before the words you want to include in the search. For example:

Sample AND Demo

+Sample +Demo

- d) 4. This search entry searches for files that contain the word "Sample" and the word "Demo".
 - i. 1. **If you only enter search terms, without using +, -, OR or AND, the search terms are connected with AND.**

3. Confirm your entry with "Enter" to start the search.

- a) ecoMAILZ displays all matches with the same notation as the words you entered in the search.
- b) If ecoMAILZ can read the attachments, they are included in the full-text search. If the search result is an attachment, the attachment is highlighted in colour in the email.

4. Click the "X" icon next to the search box to exit the search.

8.3 Search for Meta Data (Header Details)

You can filter your Emails based on the header information. For example, you can search for a specific recipient, sender or Email subject.

1. Open the search box in the upper area (header) of the ecoMAILZ Webclient by clicking the magnifying glass icon.
2. Below are some examples for search options:

- a) 1. Use the following full-text command to display the emails of a specific recipient:

```
to:
```

Example:

```
to:recipient-name@demo.de
```

- b) Use the following full-text command to display the emails of a specific sender.

```
from:
```

Example:

```
from:sender-name@demo.de
```

- c) 3. Use the following full-text command to display the emails with a specific subject line.

```
subject:
```

Example:

```
subject:test mail
```

3. Confirm your entry with "Enter" to start the search.
4. Click the "X" icon next to the search box to exit the search.

8.4 Status Filters

Please note: The status filters are not available in the "Erase Requests" folder. Instead, you can filter by users who made an erase request. If the "Two-Man Rule" is enabled, your own username is not displayed here.

You can filter your Emails by status (refer to the chapter "Basics - Status"). To do so, complete the following steps:

1. Open the advanced search in the upper area (header) of the ecoMAILZ Webclient by clicking the arrow next to the magnifying glass.
2. The available filters display. Select the filter you require from the list. The filters only display the emails associated with the user that is logged in.
 - a) **All:** This is the default filter. All Emails are displayed in descending order.
 - b) **Archived Emails:** This filter displays all finally archived Emails in ecoMAILZ, in descending order (status = green).

- c) **Emails for Review:** This filter displays all Emails within a review deadline and which are therefore not yet finally archived, in descending order (status = orange).
- d) **Emails for Deletion:** This filter displays all Emails that are marked for delete and will therefore be removed from the archive after the review deadline has expired, in descending order (status = red).
- e) **Erased Emails:** This filter displays all Emails available for the user that have been erased after final archiving and have been flagged with an erase flag, in descending order (status = black).
- f) **Open Erase Requests:** This filter displays the emails available for the user, for which there is an erase request, in descending order (Status = grey).
- g) **My Erase Requests:** This filter displays all Emails for which the user has requested erasure, in descending order (Status = grey)

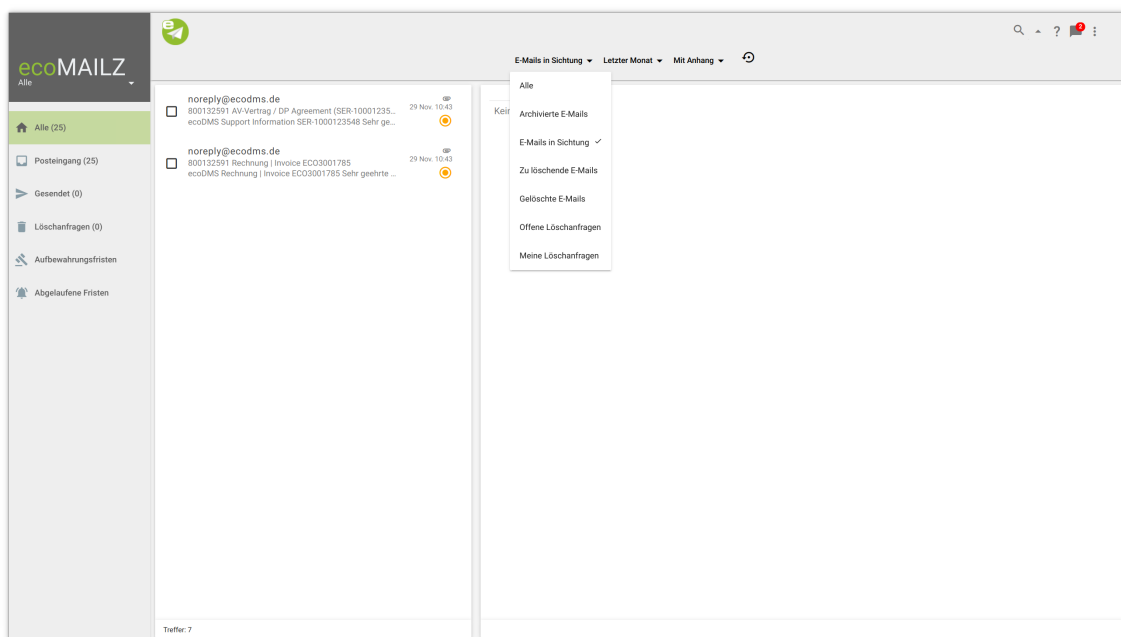


Figure 8.3: Status Filters (here: Emails in Review | from Last Month | with Attachment)

8.5 Period Filters

You can filter your Emails by time period. To do so, complete the following steps:

1. Open the advanced search in the upper area (header) of the ecoMAILZ Webclient by clicking the arrow next to the magnifying glass.
2. The available filters display. Select the filter you require from the list. The filters only display the emails associated with the user that is logged in.
 - a) **Any Time:** This is the default filter. All Emails are displayed in descending order.
 - b) **Past Hour:** Displays all Emails that arrived in the inbox within the past hour, in descending order.
 - c) **Past Day:** Displays all Emails that arrived in the inbox within the past 24 hours, in descending order.

- d) **Past Week:** Displays all Emails that arrived in the inbox within the past 7 days, in descending order.
- e) **Past Month:** Displays all Emails that arrived in the inbox within the past 30 days, in descending order.
- f) **Last Year:** Displays all Emails that arrived in the inbox within the past 365 days, in descending order.
- g) **Time Frame Options:** This filter allows you to set a user-defined period. It displays all Emails available for the user within a selected period in descending order.
 - i. In the "User-Defined Period" window, enter the respective date in the "from" and "to" boxes.
 - ii. ecoMAILZ opens a calendar from which you select the dates. You can select day, month and year.
 - A. The day is selected directly from the displayed week view.
 - B. You can switch between months by clicking the arrows (left, right).
 - C. You can switch between years by clicking the year.
 - iii. Confirm your selection by clicking "OK".

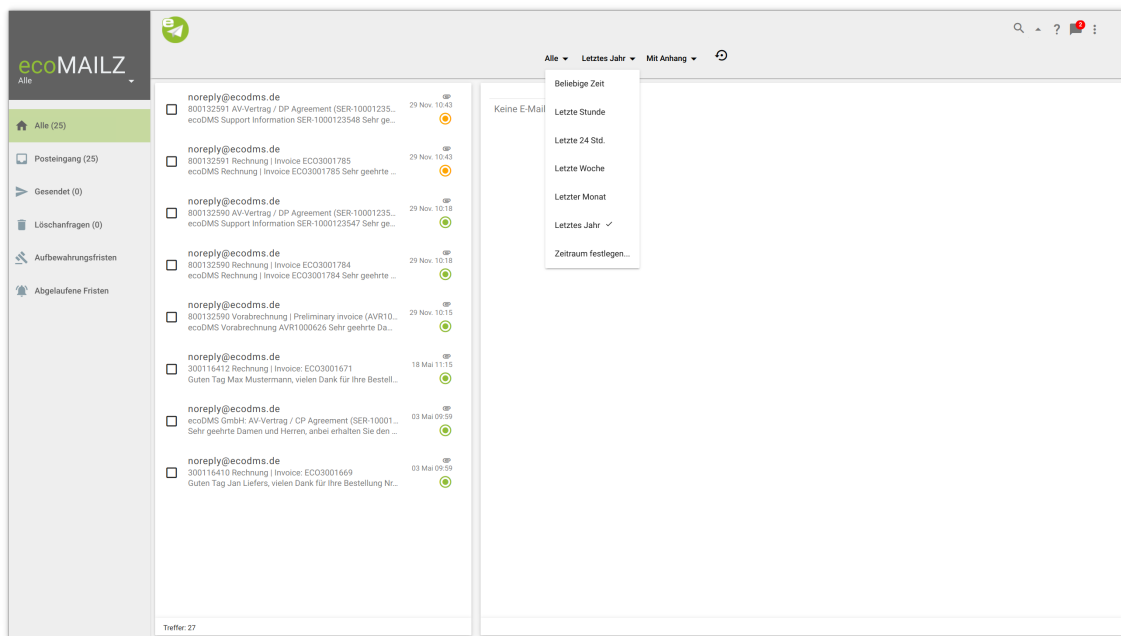


Figure 8.4: Period Filters (here: All Emails | from Last Year | with Attachment)

8.6 Attachment Filters

You can filter your Emails by attachment. To do so, complete the following steps:

1. Open the advanced search in the upper area (header) of the ecoMAILZ Webclient by clicking the arrow next to the magnifying glass.
2. The available filters display. Select the filter you require from the list. The filters only display the emails associated with the user that is logged in.
 - a) **All:** This is the default filter. All Emails are displayed in descending order.
 - b) **With Attachment:** Displays all Emails that have at least one attachment, in descending order.

c) **Without Attachment:** Displays all Emails that have no attachment, in descending order.

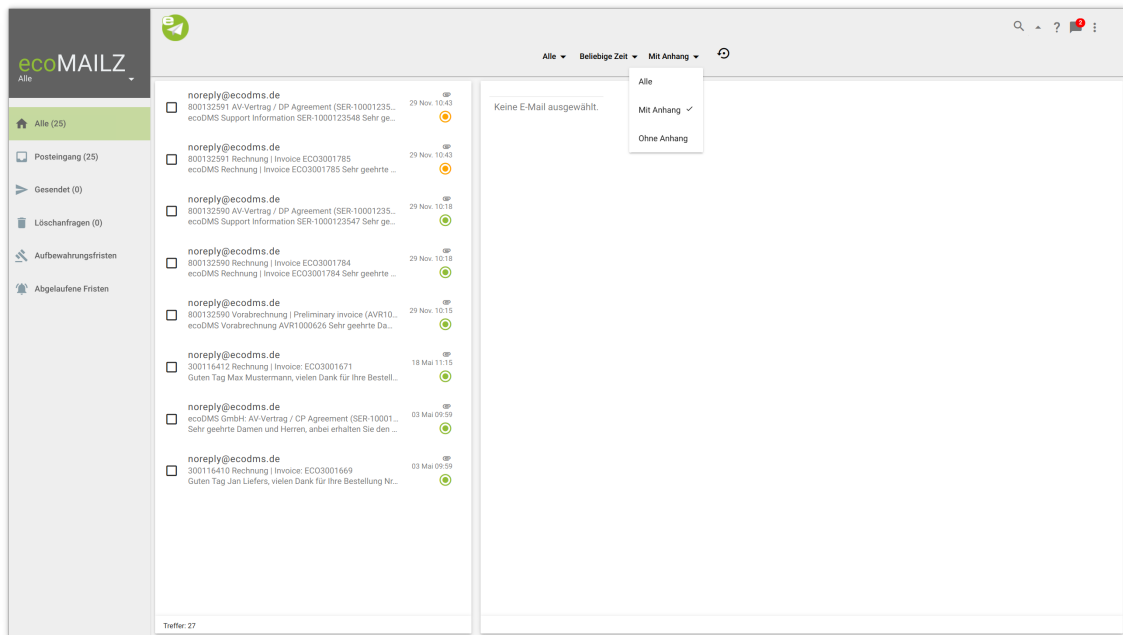


Figure 8.5: Period Filters (here: All Emails | All Periods| with Attachment)

8.7 Reset Filters

If you have enabled filters through the advanced search, you can reset them with the "Reset" icon. To do so, complete the following steps:

1. Open the advanced search in the upper area (header) of the ecoMAILZ Webclient by clicking the arrow next to the magnifying glass.
2. Click the "Reset" icon in the advanced search box.
3. All enabled filters in the advanced search are reset and cancelled.

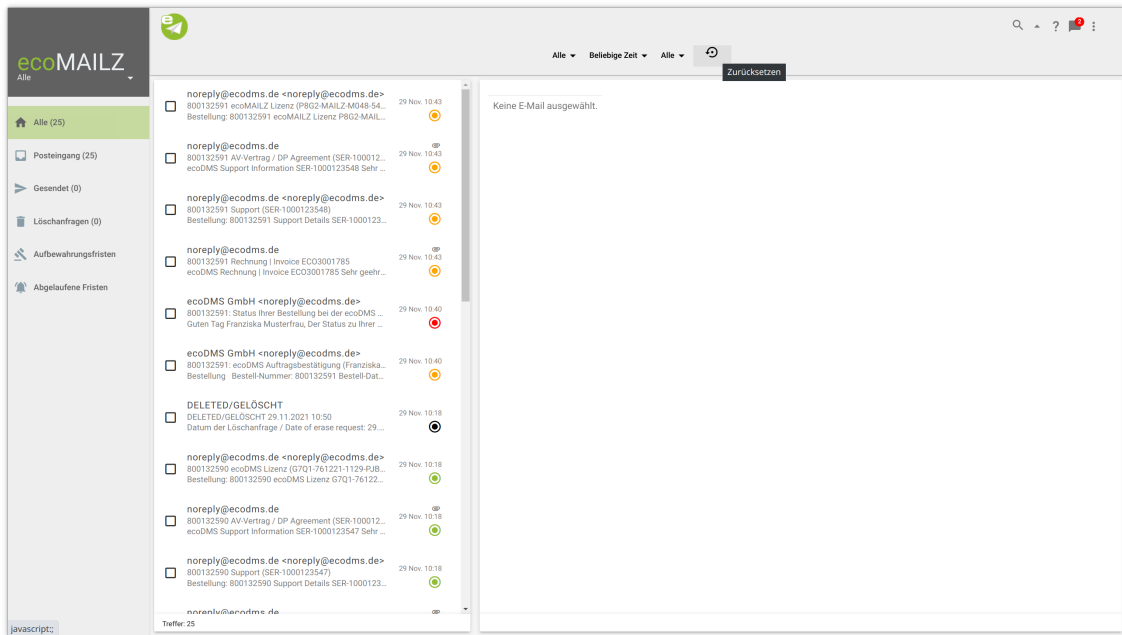


Figure 8.6: Reset Filters (Icon)

8.8 Email Addresses Filter

If your username is associated with several Email addresses, you can filter your Emails by address. To do so, select the email address from the list in the left column of the Webclient (below the "ecoMAILZ" logo).

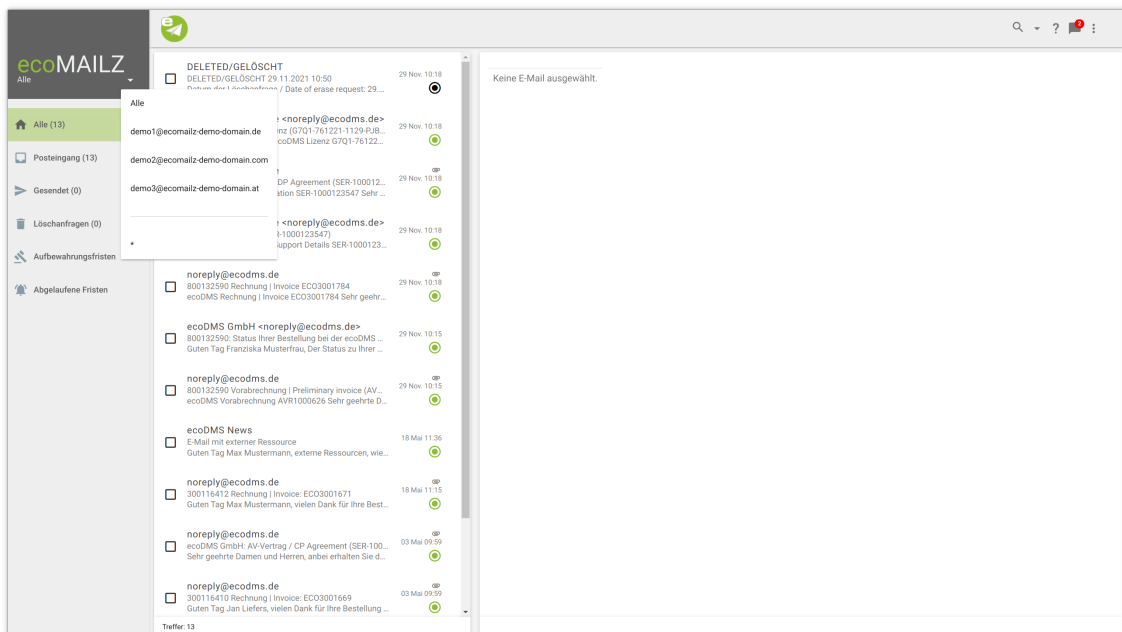


Figure 8.7: Email Addresses Filter

9 Notifications

In the ecoMAILZ header there is an icon (speech bubble) for displaying specific notifications. Among those are, for example, notifications with information about executed updates, erase requests, data backups and more.

- Click the speech bubble to open the "Notifications" dialogue box.

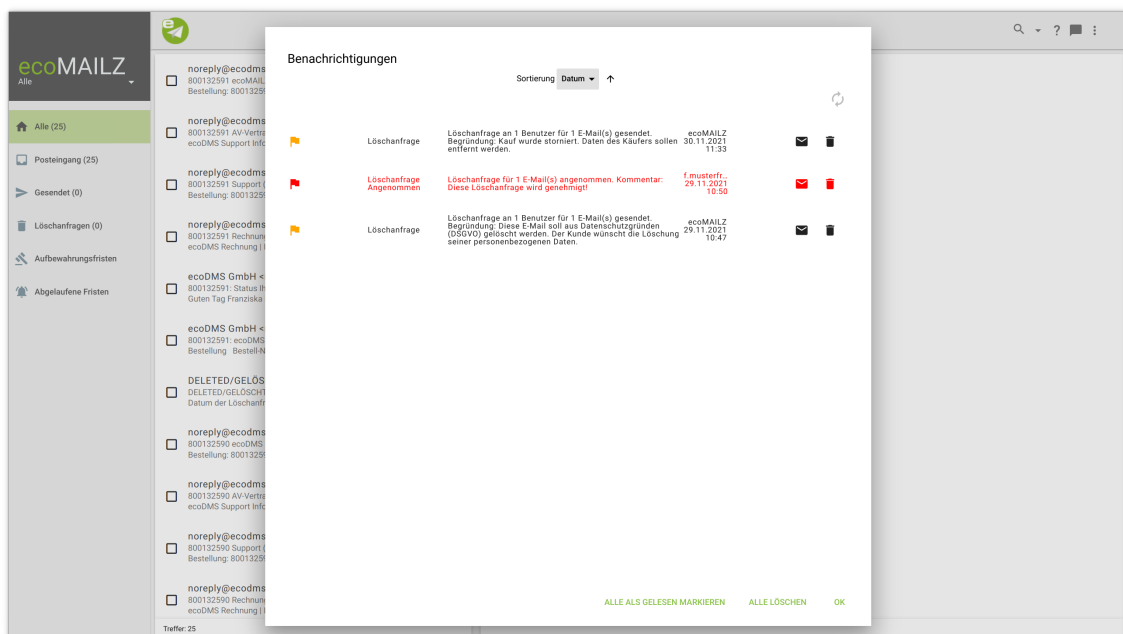


Figure 9.1: Notifications - Dialogue Box

9.1 Types

The Notifications window has information about the following:

1. General information about the software (for example, version updates)
2. Notifications about special technical features concerning the available adapters
3. Notifications about problems, errors and special features during the backup process
4. Notifications about handling erase requests

9.2 Priority

The flag in front of a notification indicates the priority of the notification:

1. red = high priority
2. orange = medium priority
3. black = low priority

9.3 Sort

You can change the notification order.

9.3.1 Ascending and Descending Order

Use the arrow icon in the upper section of the Notifications window to sort the entries in ascending or descending order.

9.3.2 Sort by Criteria

You can sort the notifications according to different criteria. Select the filter you require from the list in the "Sort" area.

9.3.2.1 Date

"Date" sorts the available notifications by date.

9.3.2.2 Priority

"Priority" sorts the available notifications by priority. The notifications are sorted by high, medium and low priority.

9.3.2.3 Read

"Read" sorts the available notifications by read and unread entries. Depending on the sort order, the read notifications are displayed first, and the unread notifications are displayed below (or vice versa).

9.3.2.4 System

"System" describes from which system the notifications were sent. The following systems are available:

1. File system adapter
2. IMAP adapter
3. Exchange adapter

4. Version update
5. Data backup
6. Erase requests

9.3.2.5 Subsystem

"Subsystem" displays detailed notifications about the system. The adapter name is displayed for adapters, the version for the version update, and the approved or rejected status for erase requests.

9.3.2.6 Users

"Users" sorts the available notifications by user.

10.2 Statuses

The ecoMAILZ Microsoft Outlook Add-in displays the archiving status of an Email directly in Outlook. The colour of the ecoMAILZ icon indicates the status in the email archive. The colour of the standard statuses is identical with the colours used in the Webclient. The status colours are:

- **orange**: the email has been saved in ecoMAILZ but has not been finally archived due to the review deadline.



Figure 10.2: Microsoft Outlook Add-in - Status Icon (Orange)

- **green**: the email is saved irrevocably in ecoMAILZ.



Figure 10.3: Microsoft Outlook Add-in - Status Icon (Green)

- **red**: the email has been saved in ecoMAILZ but will be removed from the archive after the review deadline has expired.



Figure 10.4: Microsoft Outlook Add-in - Status Icon (Red)

- **grey**: An erase request has been made for this Email. In this case a user has requested the erasure.
 - You can only execute the "Send Erase Request" function if the permission has been assigned to you in the ecoMAILZ Webclient.



Figure 10.5: Microsoft Outlook Add-in - Status Icon (Grey)

- **black**: the email was erased from ecoMAILZ.
 - You can only execute the "Approve Erase Request" function if the permission has been assigned to you in the ecoMAILZ Webclient.



Figure 10.6: Microsoft Outlook Add-in - Status Icon (Black)

- **white**: the email is not yet archived in ecoMAILZ.

- **Please note** that Emails without message ID deleted through a delete request in ecoMAILZ Archive are displayed as "not archived" (white status icon) due to restrictions in Microsoft Outlook. You can find more information about this topic in the FAQs for ecoMAILZ at www.ecodms.de.



Figure 10.7: Microsoft Outlook Add-in - Status Icon (White)

10.3 Skip Review Deadline

For more details on this process, refer to the chapters 1.2 and 7.1 in this manual.

You can skip the review deadline for messages or documents that have not been finally archived.

1. Select the email in Outlook.
2. Click the ecoMAILZ button "Skip Review Deadline".
 - a) This is usually located above the displayed message in the ecoMAILZ area.
3. the email receives the status "green" and is then stored irrevocably in ecoMAILZ.

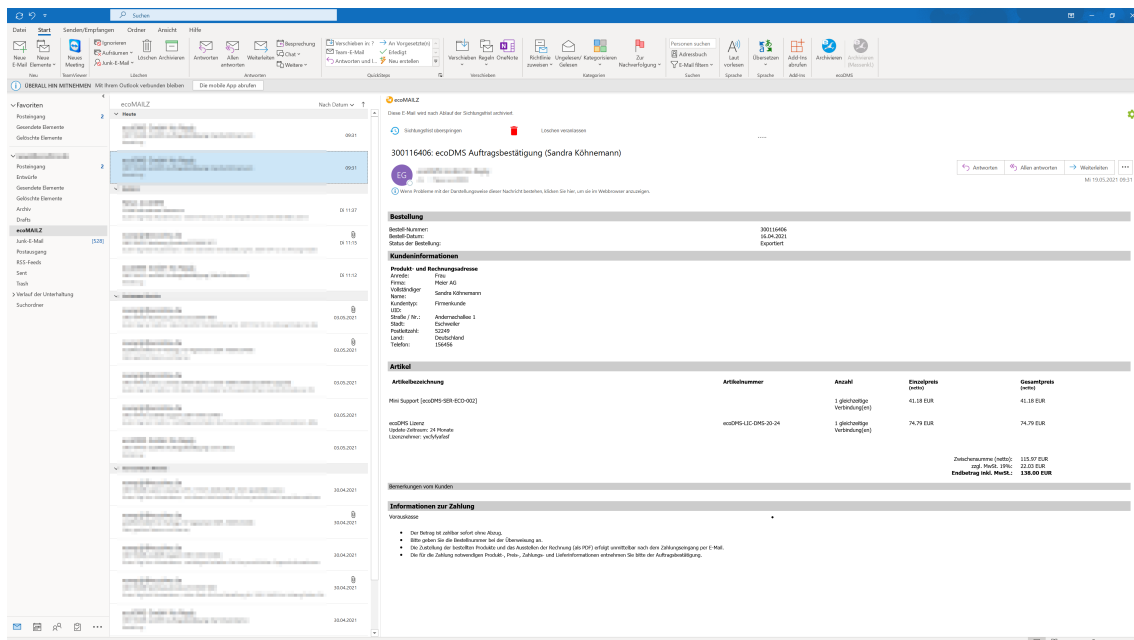


Figure 10.8: Microsoft Outlook Add-in - Skip Review Deadline

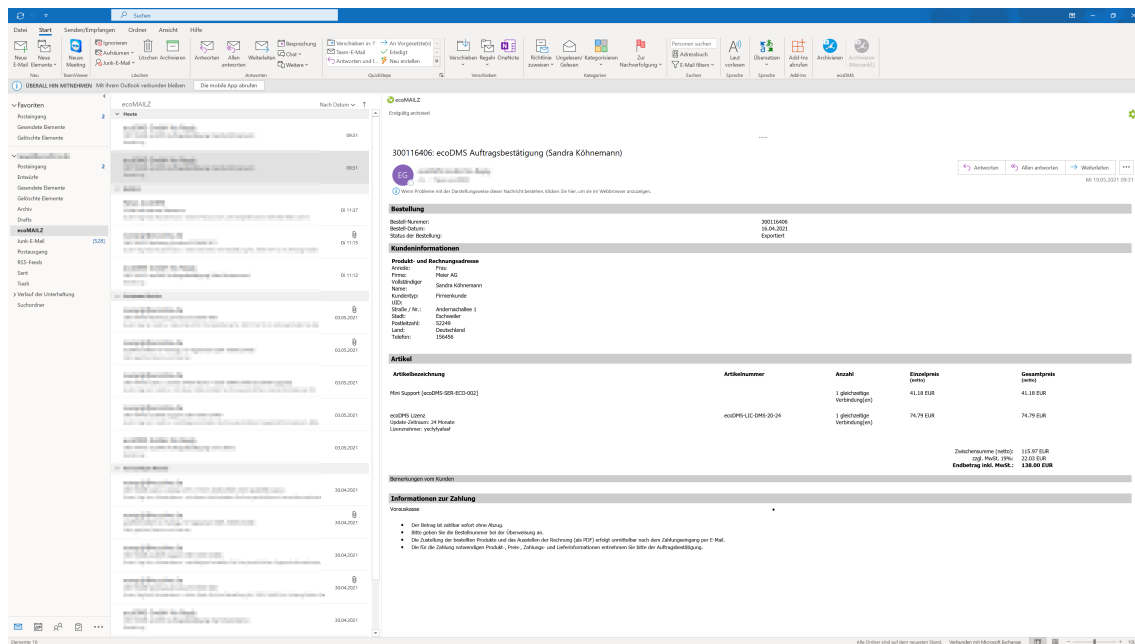


Figure 10.9: Email Options - Skip Review Deadline (New Status: Green)

10.4 Mark for Delete

For more details on this process, refer to the chapters 1.2 and 7.2 in this manual.

Emails that have not been finally archived in ecoMAILZ and have the status "orange" can be removed from the archive after the review deadline has expired.

1. Select the email you want to delete in Outlook.
2. Click the ecoMAILZ button "Mark for Delete".
 - a) This is usually located above the displayed message in the ecoMAILZ area.
3. the email now receives the status "red" and is removed from the archive after the review deadline has expired.

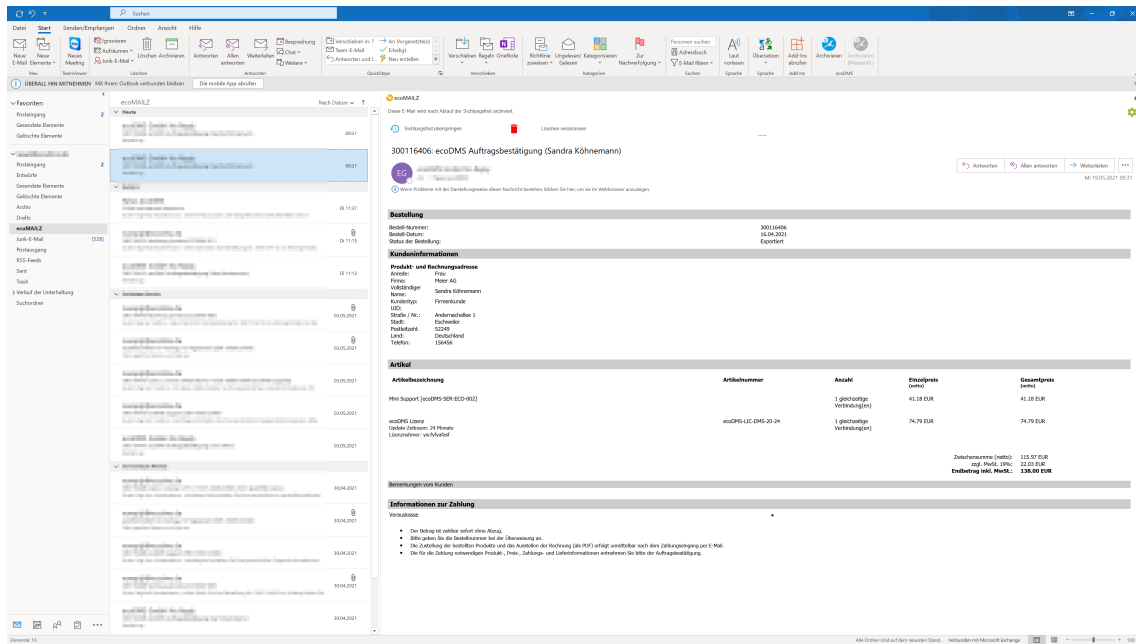


Figure 10.10: Microsoft Outlook Add-in - Mark for Delete (Current Status: Orange)

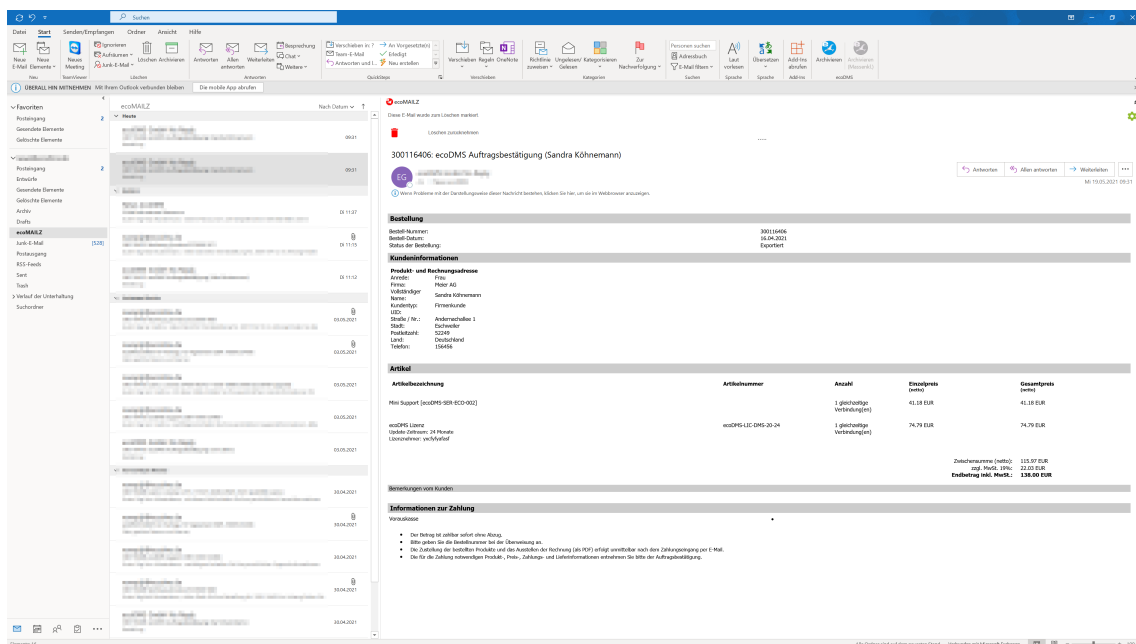


Figure 10.11: Microsoft Outlook Add-in - Mark for Delete (Current Status: Red)

10.5 Undo Delete

For more details on this process, refer to the chapters 1.2 and 7.2 in this manual.

If you inadvertently marked a message for deletion (status = red), you can undo this process within the remaining

review deadline.

1. Select the email you want to delete in Outlook.
2. Click the ecoMAILZ button "Undo Delete".
 - a) This is usually located above the displayed message in the ecoMAILZ area.
3. the email status is set to "orange".

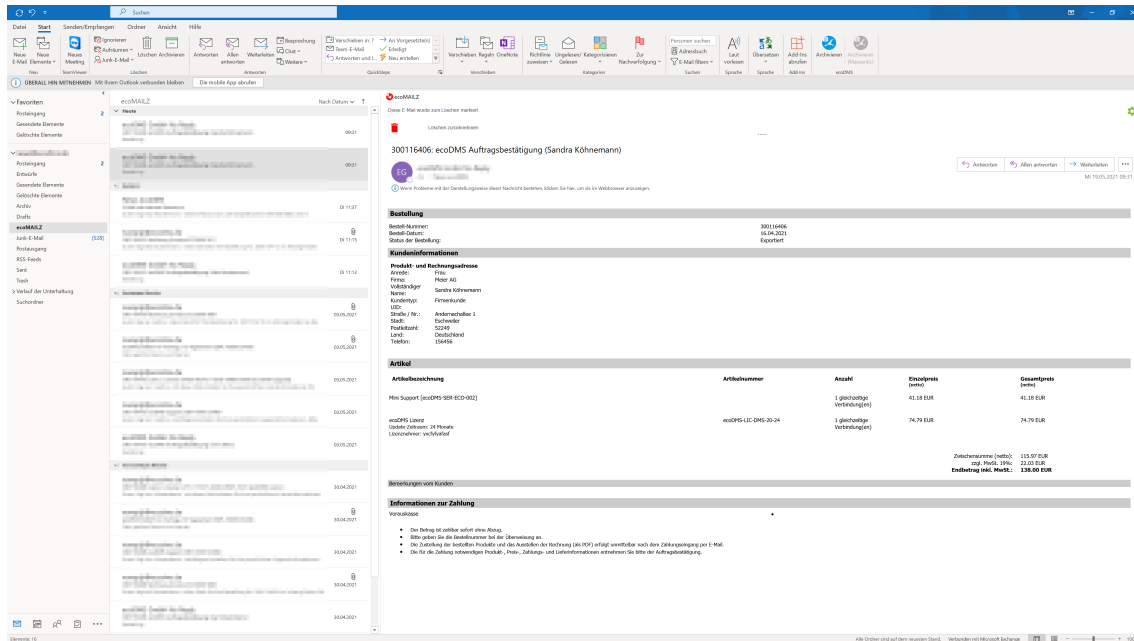


Figure 10.12: Microsoft Outlook Add-in - Undo Delete (Current Status: Red)

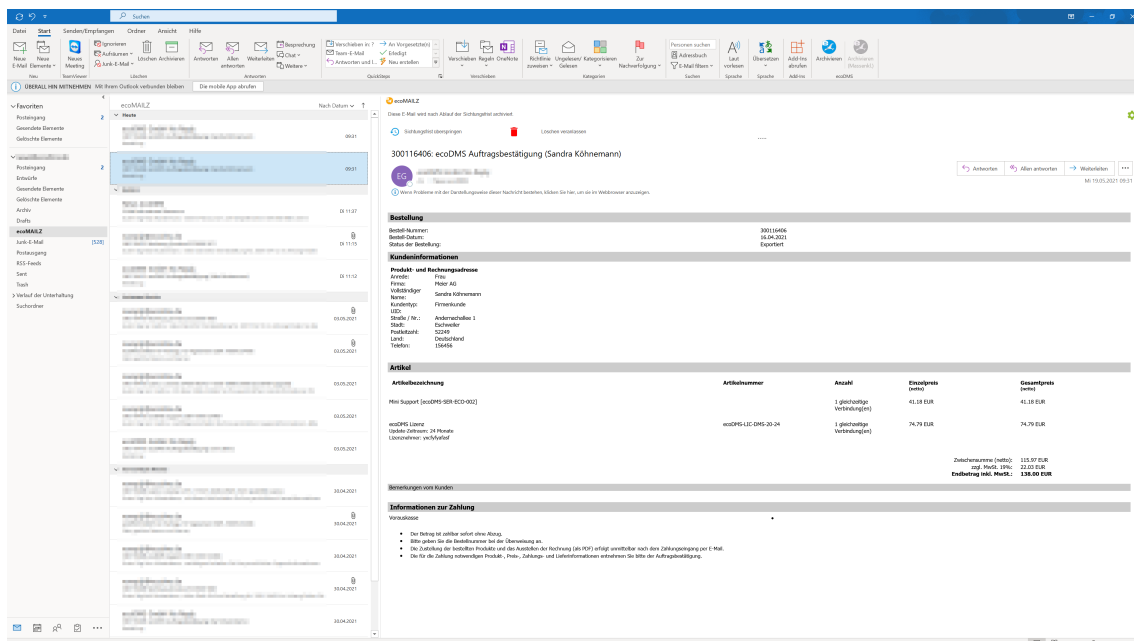


Figure 10.13: Microsoft Outlook Add-in - Undo Delete (Current Status: Orange)

11 Thunderbird Add-on

- To work with the ecoMAILZ Thunderbird add-on, you must configure it first.
- The ecoMAILZ installation manual describes how to set up the connection.

The Thunderbird add-on connects ecoMAILZ with your email interface. This allows you to monitor the archiving status and make various archiving settings in Thunderbird.

11.1 Archive Emails

The adapters created in ecoMAILZ automatically archive your Emails in the background. As soon as the messages arrive, they are downloaded from the mail server and transferred to the archive.

1. Setup one or more adapters via the ecoMAILZ Webclient.
 - a) This manual also describes how to configure the adapters in chapter 4.

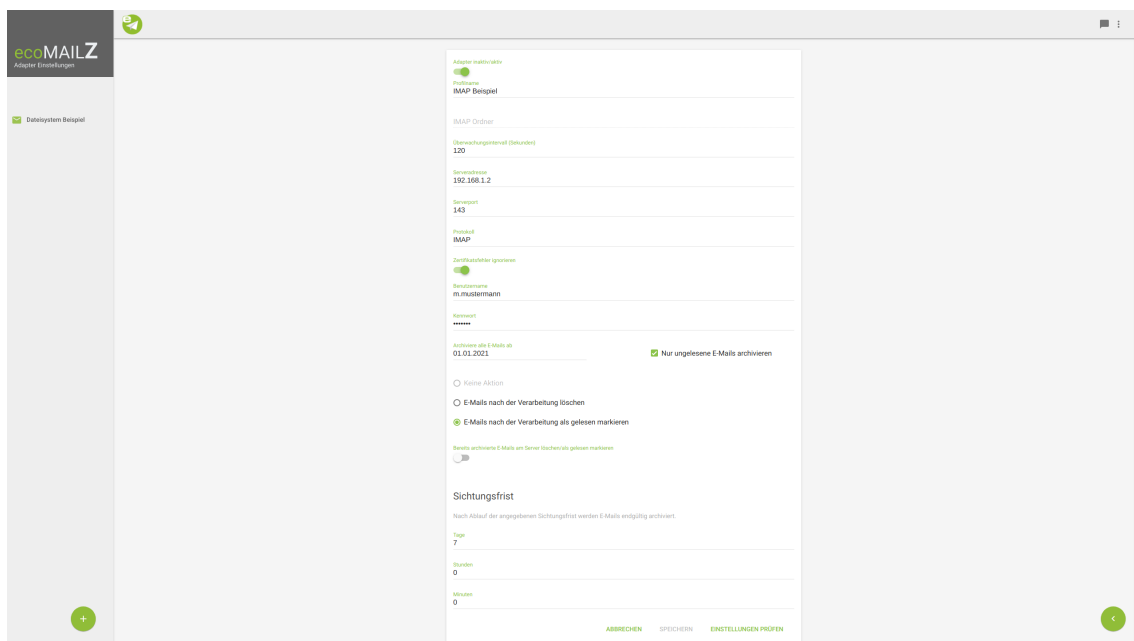


Figure 11.1: Adapter Settings - IMAP / POP3

11.2 Statuses

The ecoMAILZ Add-on for Thunderbird displays the archiving status of an Email directly in Thunderbird. The colour of the ecoMAILZ icon indicates the status in the email archive. The colour of the standard statuses is identical with the colours used in the Webclient. The status colours are:

- **orange**: the email has been saved in ecoMAILZ but has not been finally archived due to the review deadline.



Figure 11.2: Plugin for Thunderbird - Status Icon (Orange)

- **green**: the email is saved irrevocably in ecoMAILZ.



Figure 11.3: Plugin for Thunderbird- Status Icon (Green)

- **red**: the email has been saved in ecoMAILZ but will be removed from the archive after the review deadline has expired.



Figure 11.4: Plugin for Thunderbird- Status Icon (Red)

- **grey**: An erase request has been made for this Email. In this case a user has requested the erasure.
 - You can only execute the "Send Erase Request" function if the permission has been assigned to you in the ecoMAILZ Webclient.



Figure 11.5: Plugin for Thunderbird- Status Icon (Grey)

- **black**: the email was erased from ecoMAILZ.
 - You can only execute the "Approve Erase Request" function if the permission has been assigned to you in the ecoMAILZ Webclient.



Figure 11.6: Plugin for Thunderbird- Status Icon (Black)

- **white**: the email is not yet archived in ecoMAILZ



Figure 11.7: Plugin for Thunderbird- Status Icon (White)

- **green with "x"**: ecoMAILZ has not been configured (see Login & Settings in this chapter).



Figure 11.8: Plugin for Thunderbird- Status Icon (Green with "X")

- **green with "lightning"**: An error has occurred (for example, no connection to the ecoMAILZ archive).



Figure 11.9: Plugin for Thunderbird - Status Icon (Green with "Lightning")

11.3 Skip Review Deadline

For more details on this process, refer to the chapters 1.2 and 7.1 in this manual.

You can skip the review deadline for messages or documents that have not been finally archived.

1. Select the email in Thunderbird.
2. Click the arrow next to the ecoMAILZ button and select the function "Skip Review Deadline".
 - a) This is usually located above the displayed message in the ecoMAILZ area.
3. the email receives the status "green" and is then stored irrevocably in ecoMAILZ.

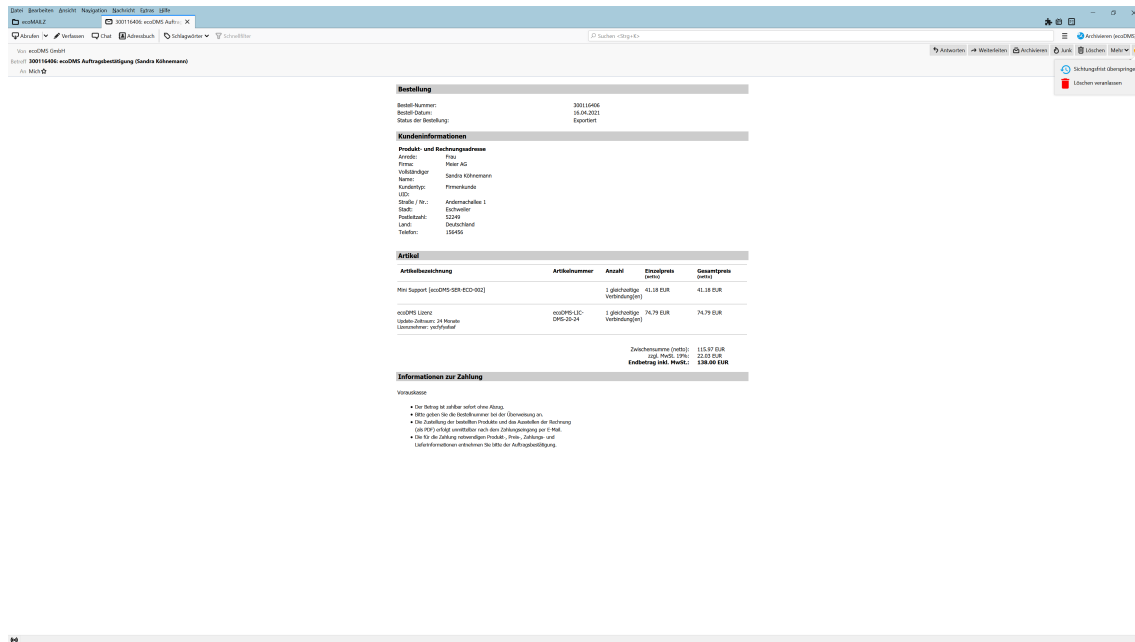


Figure 11.10: ecoMAILZ Add-on for Thunderbird - Skip Review Deadline

11.4 Mark for Delete

For more details on this process, refer to the chapters 1.2 and 7.2 in this manual.

Emails that have not been finally archived in ecoMAILZ and have the status "orange" can be removed from the archive after the review deadline has expired.

1. Select the email in Thunderbird.
2. Click the arrow next to the ecoMAILZ button and select the function "Mark for Delete".
 - a) This is usually located above the displayed message in the ecoMAILZ area.
3. the email now receives the status "red" and is removed from the archive after the review deadline has expired.

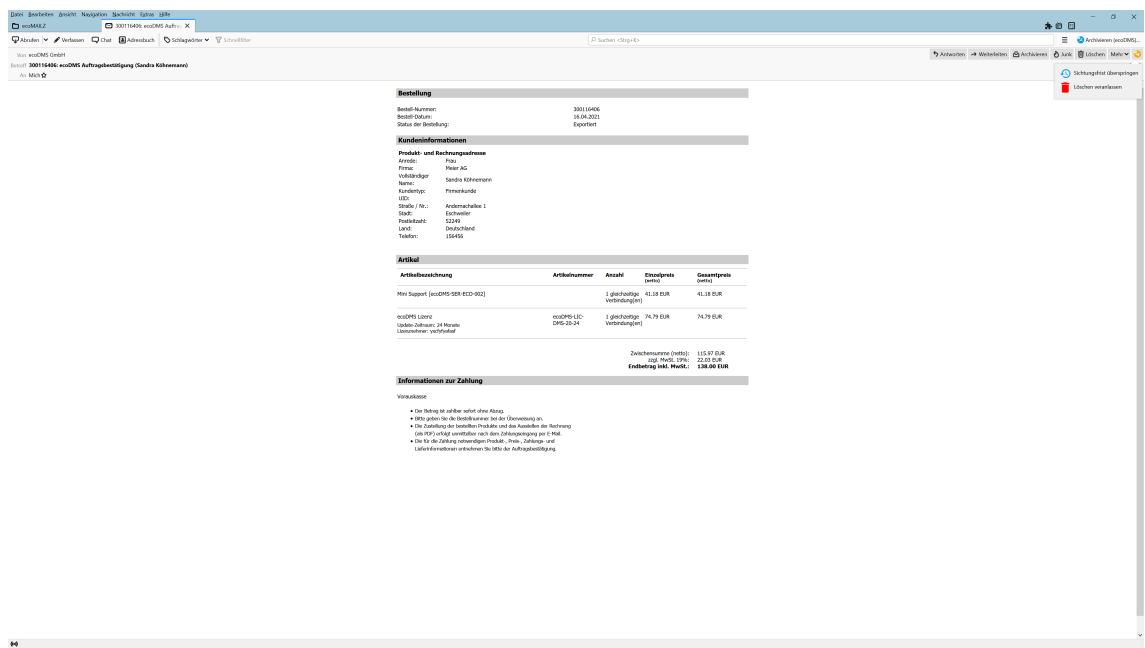


Figure 11.11: ecoMAILZ Add-on for Thunderbird - Mark for Delete (Current Status: Orange)

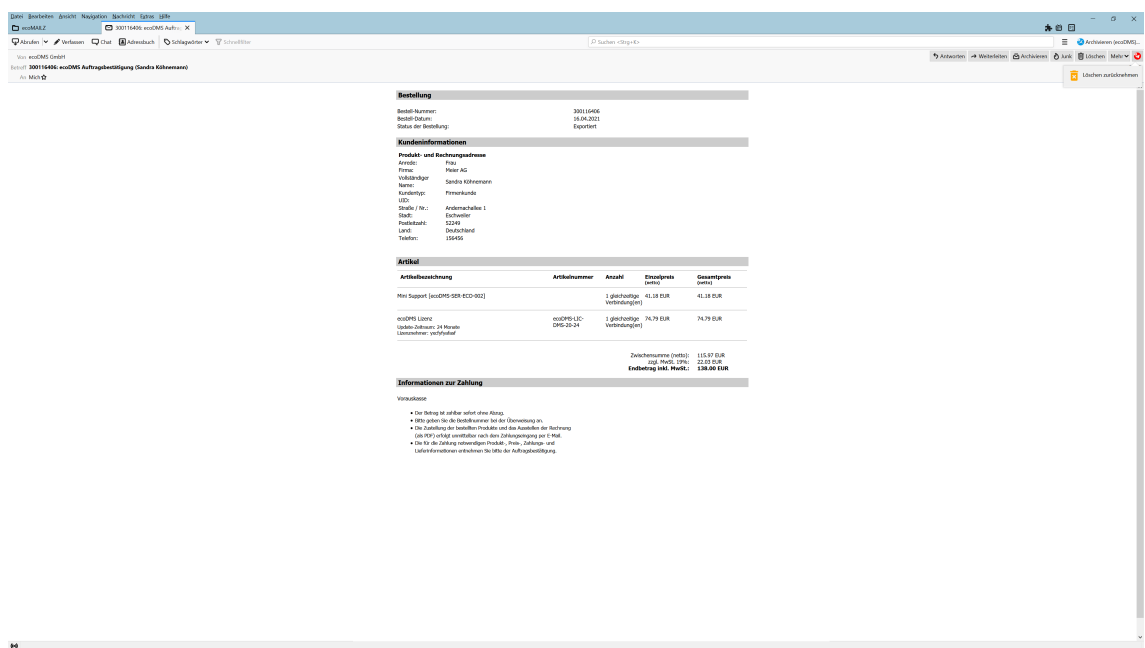


Figure 11.12: ecoMAILZ Add-on for Thunderbird - Mark for Delete (Current Status: Red)

11.5 Undo Delete

For more details on this process, refer to the chapters 1.2 and 7.2 in this manual.

If you inadvertently marked a message for deletion (status = red), you can undo this process within the remaining

review deadline.

1. Select the email in Thunderbird.
2. Click the arrow next to the ecoMAILZ button and select the function "Undo Delete".
 - a) This is usually located above the displayed message in the ecoMAILZ area.
3. the email status is set to "orange".

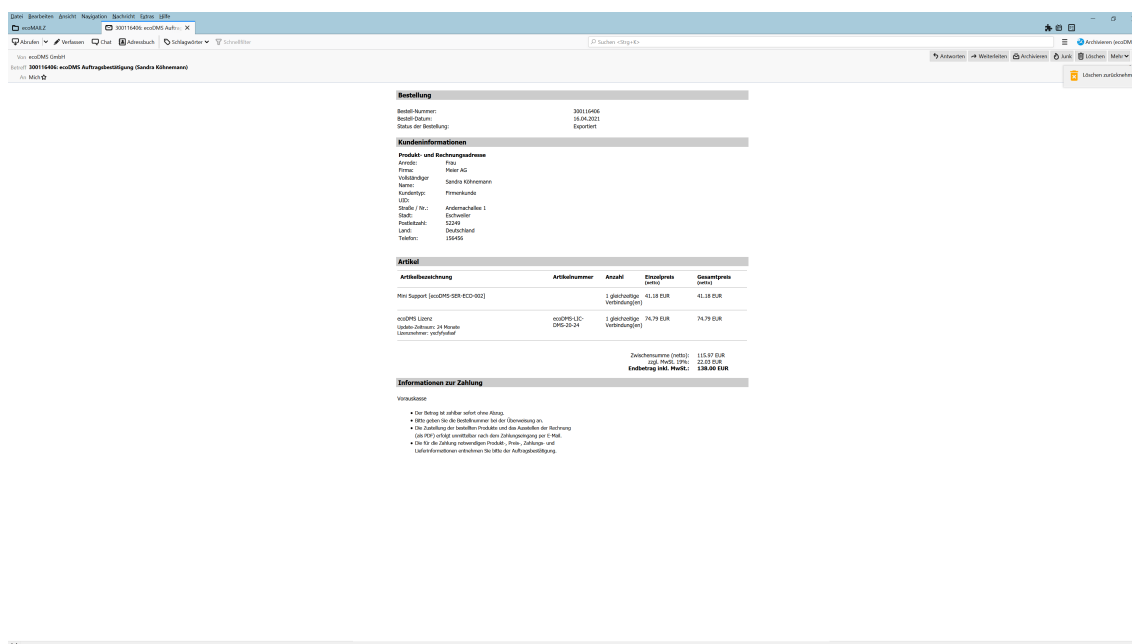


Figure 11.13: ecoMAILZ Add-on for Thunderbird - Undo Delete (Current Status: Red)

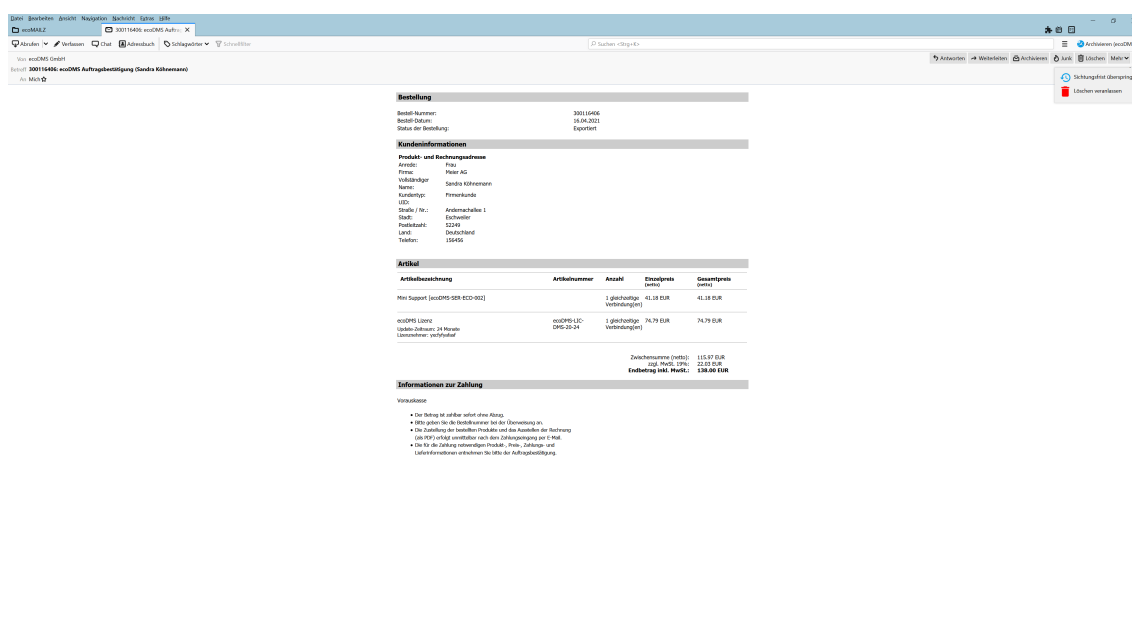


Figure 11.14: ecoMAILZ Add-on for Thunderbird - Undo Delete (Current Status: Orange)

12 ecoMAILZ Plugin for ecoDMS

- To find out how to use the ecoMAILZ plugin, refer to the manual of the respective ecoDMS version.
- You can find all manuals and software components in the download area of the ecoDMS website.

13 Login Credentials

The following contains the initial login credentials of ecoMAILZ.

13.1 Super User / Default User

The super user (default user) is created automatically when you first install ecoMAILZ. This user serves system configuration and thus has, among others, the permission to make system settings and add more users. Please note that you cannot delete super users. This user cannot see emails.

The login credentials for the super user (if the password has not been changed) are:

- Username: ecomailz
- Password: ecomailz

Change your password as soon as possible for security reasons.