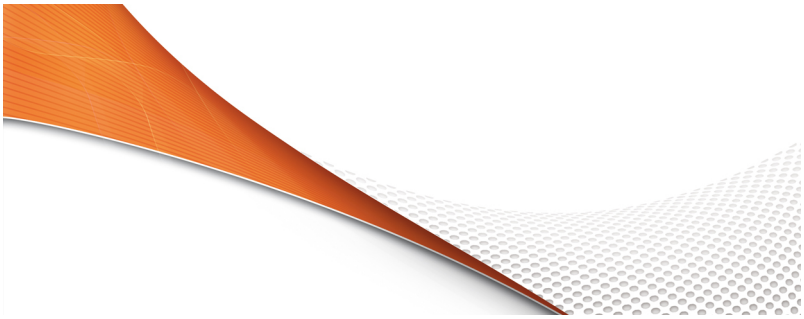
# ELO

Document Management and Archiving Software



# ELO Web Client

**December 2015**

**ELO Digital Office GmbH**

**http://www.elo.com**

**Copyright © 2015 ELO Digital Office GmbH**
**All rights reserved**

[21.12.2015-10:13 - en - 9.03.000]

# Table of Contents


***Introduction*** ..... ***5***

*Conventions* ..... *6*

*How is the user manual organized?* ..... *8*

***Basics*** ..... ***9***

*Requirements and installation* ..... *10*

*First program start* ..... *12*

*Program interface* ..... *13*

*Program interface in detail* ..... *14*

***Examples of use*** ..... ***23***

*Filing via drag-and-drop* ..... *24*

*Creating a folder* ..... *26*

*Insert file* ..... *27*

*Finding documents with the ELO iSearch* ..... *30*

*Searching via the ELO Click OCR* ..... *37*

*Add margin note* ..... *40*

*Edit document* ..... *43*

***Functions*** ..... ***48***

*Function overview* ..... *49*

***Keywording*** ..... ***79***

*Index fields* ..... *81*

*Keywording with ELO Click OCR* ..... *83*

*Edit keywording* ..... *86*

***ELO Collaboration*** ..... ***88***

*Feed* ..... *89*

*My ELO* ..... *95*

*Profile image* ..... *104*

***Text and image display*** ..... ***112***

***Administration*** ..... ***117***

*Configuration page* ..... *118*

*Start pages and entry points* ..... *133*

*Settings via the ELO Application Server Manager* ..... *138*

*Troubleshooting* ..... *145*

*Configuration file*.....149
***Scripting API*.....150**
***Appendix*.....152**
*Website*.....153
*Glossary*.....154
*Disclaimer of liability*.....155
***Index*.....157**

# Introduction

Welcome to the user manual for the ELO Web Client. Thanks for choosing to use the ELO Web Client.

**Copyright notices**

The copyright for this program belongs to ELO Digital Office GmbH. The product may only be copied and used in accordance with the License Agreements.

It is illegal to copy, reproduce, or distribute the ELO Web Client in whole or in part. No part of this manual may be reproduced, distributed, translated, or otherwise duplicated without the prior written consent of ELO Digital Office GmbH. The contents of this book in no way represent an entitlement on the part of the purchaser.

**Trademarks**

ELO Web Client is a registered trademark of ELO Digital Office GmbH. Microsoft Windows, Microsoft Word, and Microsoft Excel are registered trademarks of Microsoft Corporation. All other product names are protected by copyright and are registered trademarks or brand names of their respective owners.

**Please note:**

We have made every effort to supply product documentation that is as accurate as possible. However, since we are continuously developing the ELO Web Client and create several versions at the same time, the program can undergo changes very quickly. For this reason, small display errors here and there in the manual are unavoidable. For this we ask for your understanding.

# Conventions

The following conventions apply for this user manual:

**Information**: This is additional information that makes working with ELO easier.

**Please note**: Take this note into account to guarantee smooth operation of your program.

**Warning**: It is essential that you adhere to this note to avoid significant restrictions in the operation of your program.

**Italics**

The names of menus, options, dialog boxes, folders, references to chapters, paths, and file extensions are written in *italics*.

Example: Click the *ELO button* > *Configuration* and choose the *Mail* tab.

**Keyboard shortcuts**

Shortcuts are written in UPPER CASE. Keys pressed at the same time are indicated with a plus sign (+).

Example: CTRL + C

**Bold**

**Notes** and **headers** are highlighted in **bold** in the manual. This also applies for the words **alternatively**, **optionally** and the names of examples.

**Courier**

Program code, program outputs, inputs and scripts are written in `Courier` font.

Example: `MsgBox "Hello world!"`

**Paths**

This user manual differentiates between three types of paths:

**Navigation paths**: These paths describe the order of buttons and menu items you click through to use certain functions. You can recognize navigation paths by the pointy brackets (>) and the italic font.

Example: Click the *ELO button* > *Configuration* > *Notes* > *Print margin notes*.

**Filing paths**: These paths describe filing paths within the ELO repository. You can recognize filing paths by the pilcrow sign (¶).

Example: Save the document under ¶ Filing ¶ Year ¶ Month.

**Document and filing paths**: These paths describe storage locations for files within the operating system. We indicate this by using backslashes (\).

For example: Save the document under C:\Documents\Vacation.

# How is the user manual organized?

| | |
|---|---|
| | The goal of this user manual is to explain the functions of the ELO Web Client. |
| **Introduction** | The first chapter contains general information about using the manual and an overview of the chapter content. |
| **Basics** | This chapter offers important information on setting up the ELO Web Client. |
| **Examples of use** | This chapter contains usage examples which should help familiarize you with the ELO Web Client. |
| **Functions** | This chapter provides you with an overview of the functions of the ELO Web Client. You will learn how and where to start the various functions, and what they are used for. |
| **Keywording** | This chapter provides information on *Keywording*in ELO. |
| **Text and image display** | This chapter provides you with information on how to use the text and image preview. |
| **Administration** | This chapter is geared toward administrators. It includes information on the configuration and management of the ELO Web Client. |
| **Scripting API** | Here, you will find all important information about the ELO Web Client programming interface. |
| **Appendix** | The annex includes information on the website, a glossary as well as the Disclaimer of Liability. |
| **Index** | The index includes important keywords. |

# Basics

This chapter contains basic information on the ELO Web Client.

The chapter will discuss the following topics:

- Requirements
- Installation
- ELO Web Client Internet Access
- Launching the program
- Program interface

# Requirements and installation

**Web archive**

The ELO Web Client consists of a web archive (.war) that is deployed on an Apache Tomcat Server.

The ELO Web Client must be installed individually for each repository that is managed through a separate Indexserver.

**ELO Server/Tomcat**

To enable parameter transfer with special characters, the `/conf/server.xml` file of the ELO Server/Tomcat must have the entry `URIEncoding="UTF-8"` in the Connector section.

**Example**

```
<Connector port="8080" protocol="HTTP/1.1"
connectionTimeout="20000" redirectPort="8443"
URIEncoding="UTF-8" />
```

**Browser**

The ELO Web Client runs as a web application in a browser. As an HTML5 application, the ELO Web Client requires a current browser. The browser must at least support the newest HTML5, CSS and JavaScript standards.

**Information**: Configure the browser in such a way that JavaScript is activated and that cookies are allowed.

The document *System requirements* contains information about which browsers are currently supported.

Even if the ELO Web Client is generally supported by older browser versions, we recommended working with newer browser versions. This guarantees a better performance.

**Information**: When using Internet Explorer, icons may not be loaded correctly and the default icons are displayed instead. This phenomenon occurs for all versions of Internet Explorer.

Please note that the drag-and-drop function was deactivated for Firefox due to erroneous results.

**Indexserver access**

The Indexserver must be available directly for the browser (see section *ELO Web Client Internet Access*).

**Single sign-on**

Single sign-on (SSO) runs directly via the Indexserver, you do not need to configure this in the ELO Web Client.

**Installation**

The ELO Web Client is installed via the server setup. Refer to the *Server* manual for information on the installation.

**ELO Web Client Internet Access**

Working with the ELO Web Client both via the local intranet as well as via the Internet requires a specific configuration of the ELO Web Client Internet Access.

Refer to a separate developer documentation on the SupportWeb for detailed information on the configuration of the ELO Web Client.

# First program start

The ELO Web Client offers a number of options for users to start the program.

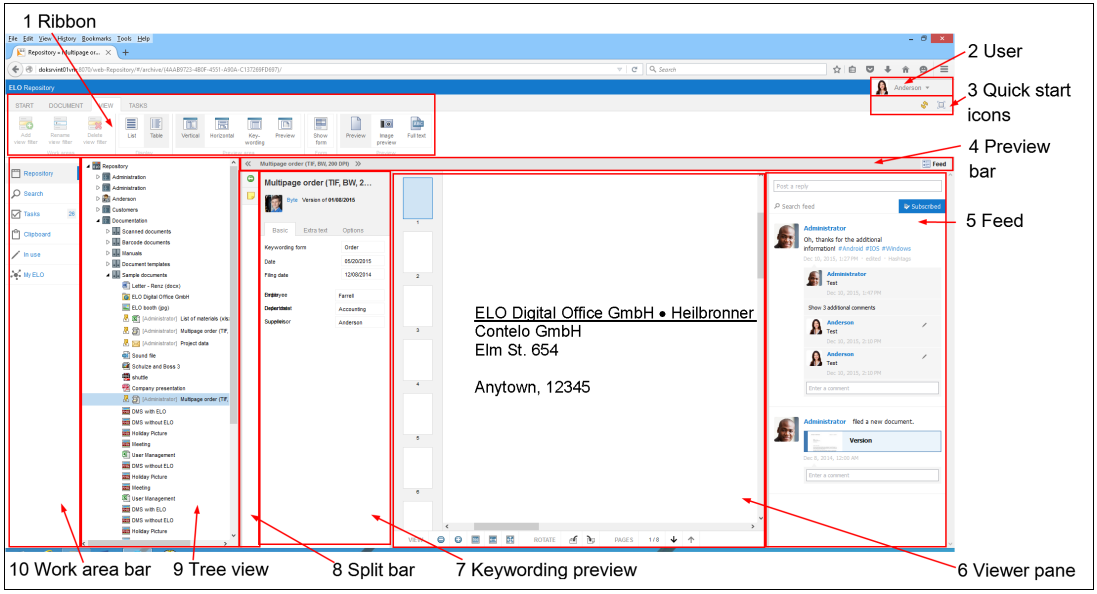
Please read the *Start pages and entry points* section in the *Administration* chapter for the configuration of the program start.

**Manual logon**

The manual logon can also be used without additional settings. You reach the manual logon via a URL with the following scheme:

**http://<host>:<port>/web-<repositoryname>/logon.html**

# Program interface




The program interface of the ELO Web Client is divided into the following areas:

(1) Ribbon
(2) *User account* button (shows the respective user names)
(3) Quick start icons with the *Maximize/minimize preview* button.
(4) Preview bar
(5) Feed
(6) Viewer pane
(7) Keywording preview
(8) Split bar
(9) Tree view
(10) Work area bar

# Program interface in detail

The individual areas of the program interface are briefly explained in the following.

**(1) Ribbon**

The ribbon has four standard tabs and two contextual tabs.

The standard tabs are:

- Start
- Document
- View
- Tasks

The contextual tabs are:

- Search (opens after clicking the *Search* work area)
- Clipboard (opens for copying, referencing or moving entries in ELO)

You can show or hide the ribbon by double-clicking the tab.

**(2) User account button**

You can open the ELO menu via the user account. The following menu items are located in the ELO menu:

- **Configuration**: Open the configuration page to adjust the settings for the ELO Web Client.
- **Change password**: Call up the dialog box for changing your password here.
- **About**: Opens the *About* dialog box. You can find information on the client version used and the serial number here.
- **Web Client help**: Use the *Web Client help* button to open the ELO help pages.
- **Log off**: Use this menu item to log off from the ELO Web Client.

**(3) Quick start icons**

You have access to a selection of functions via the quick start icons. You only see all quick start icons when you hide the ribbon. The *Maximize/minimize preview* button is always shown. You can add additional icons via the ELO Web client configuration. You can find more information on this in the *Administration* chapter.

**Maximize preview**

Use the *Maximize preview* button to hide the ribbon, the work area bar and the tree view.

**(4) Preview bar**

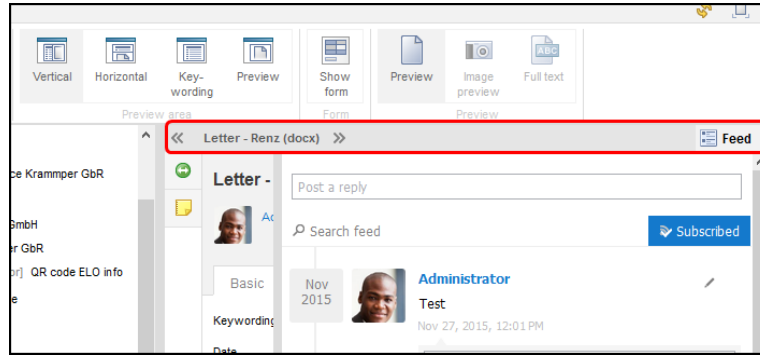



Fig. 2: Preview bar with default settings

The short name of the selected entry appears in the preview bar. Use the arrow icons to the left and right of the short name to expand and collapse the areas of the ELO window.

In addition, buttons for adjusting the viewer pane, depending on the setting.

**Information**: By default, the following buttons (except those for the feed) appear on the ribbon. If you want the buttons to appear on the preview bar, you need to go to *Configuration* > *Display* > *Appearance* and uncheck the *Show icons for the preview area on the ribbon* option.

**Available depending on the settings**

**Show original document**: The document is shown in full resolution. You need to download documents that exceed a certain size. The default is 2 MB.

**Show preview document**: The server returns a preview image with a lower resolution for this option.

**Show full text database content**: You see the text content of the document read by the OCR.

**Tile keywording and document preview side-by-side**: The keywording preview appears to the left of the viewer pane.

**Show keywording and document preview stacked**: The keywording preview appears via the document preview.

**Keywording preview only**: The document preview is hidden.

**Document preview only**: The keywording preview is hidden.

**Show form**: A keywording form appears in the keywording preview.

**Always available**

**Feed**: Use this button to show or hide the feed.

**(5) Feed**

The feed is used to share information on an entry and it records changes to the entry.

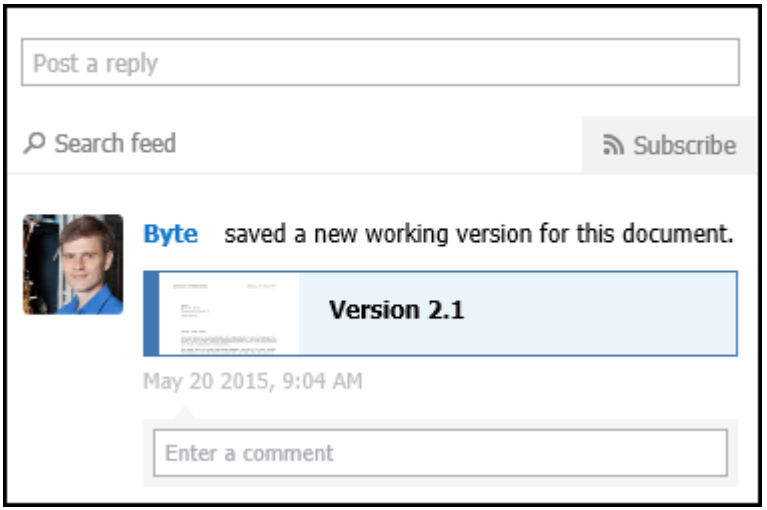



Fig. 3: Feed post

**(6) Viewer pane**

**(6 a) Document**: When a document is selected you see the currently selected document as a preview in the display area.

**(6b) List view**: When a folder is selected, all child entries of the selected folder can be displayed in a list. Select the list view via *Ribbon > View > List*.

**(6 c) Table view**: When a folder is selected, all child entries of the selected folder can be displayed in a table. Select the table view via *Ribbon* > *View* > *Table*.

**Adjust tables**

You can use the column headings to sort the column contents. Each column has a drop-down menu that can be opened by clicking the arrow symbol to the right of the respective column heading.

search this folder

| Type | Short name | Date | Filed by | Versio | Keywording form | Filing date |
|---|---|---|---|---|---|---|
| | Letter - Renz (docx) | 06/03/2015 | Administr... | | Basic Entry | 12/08/2014 |
| | ELO Digital Office GmbH | 11/25/2013 | Administr... | | Basic Entry | 12/08/2014 |
| | ELO booth (jpg) | 03/17/2015 | Administr... | | Marketing | 12/08/2014 |
| | List of materials (xlsx) | 05/20/2015 | Administr... | 2.1 | Basic Entry | 12/08/2014 |
| | Multipage order (TIF, BW, 200 DPI) | 06/17/2015 | Administr... | 1 | Invoice | 12/08/2014 |
| | Project data | 08/10/2015 | Administr... | 1 | Basic Entry | 12/08/2014 |
| | Sound file | 11/25/2013 | Administr... | | Basic Entry | 12/08/2014 |
| | Schulze and Boss 3 | 11/25/2013 | Administr... | | Basic Entry | 12/08/2014 |
| | shuttle | 11/25/2013 | Administr... | | Basic Entry | 12/08/2014 |
| | Company presentation | 11/25/2013 | Administr... | | Basic Entry | 12/08/2014 |
| | Multipage order (TIF, BW, 200 DPI) | 05/20/2015 | Administr... | | Order | 12/08/2014 |
| | DMS with ELO | 08/10/2015 | Administr... | 1 | Basic Entry | 08/10/2015 |

Fig. 4: Column sorting context menu

The drop-down menu offers the following sorting and display options:

**Alphabetical**: Items are sorted from A-Z.

**Alphabetical descending**: Items are sorted from Z-A.

**Columns**: An additional drop-down menu appears. Here, you can determine which columns are displayed. The program displays all columns by default. You need to clear the corresponding check box to hide a column.

**Group By This Field**: All list contents will be grouped by the selected column heading, that is that the column heading serves as classification criteria. If, for example, this option is selected in the *Type* column, the documents will be sorted by type.

**Show in Groups**: If the check box for this option is selected, the list will be displayed grouped by the column heading that was selected with the *Group By This Field* option. Remove the grouping by clearing the check box.

Only documents are displayed for which the ELO Web Client finds a preview component.

**Search folder**

When a folder is selected, the folder can be searched directly in the viewer pane.

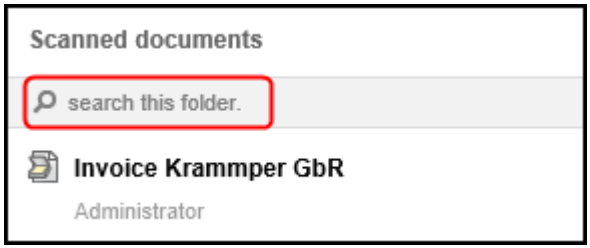



Fig. 5: Search field in the viewer pane

1. Click *search this folder* in the viewer pane.

The search field is active. The cursor in the search field blinks.

2. Enter a search term.

3. Click the *Search* button.

The search term appears in the display area.

**Information**: Cancel the search with the *Reset* button.

**Sort order**

When a folder is selected, the display order of the child entries can be changed. The following sorting methods are available for selection:

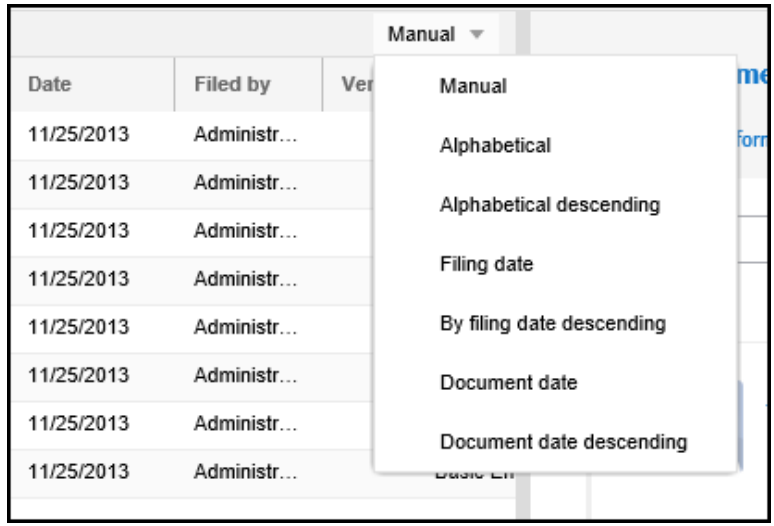



Fig. 6: Drop-down menu for sorting the folder contents

**Manual**: With this setting, you can sort entries via drag-and-drop. This is particularly useful for individually created folders.

**Alphabetical**: A-Z.

**Alphabetical descending**: Z-A.

**Filing date**: The entries are sorted by filing date. The filing date is the date on which an entry was filed (created) in the ELO repository. The entry with the most recent filing date is placed at the bottom.

**By filing date descending**: The entries are sorted according to filing date in reverse order. The latest date is placed at the top.

**Document date**: The are sorted by the document date. The latest date is placed at the bottom.

**Document date descending**: The entries are sorted by the document date in reverse order. The latest date is placed at the top.

**Information**: The sorting function can be deactivated in the viewer pane. You can find more information on this in the *Administration* chapter.

**Infinite scrolling**

For folders with many child entries, the list/table is split into pages. The ELO Web Client is preconfigured in such a way that you can scroll through the pages without having to page.

**Information**: The endless scroll function can be deactivated. You can find more information on this in the *Administration* chapter.

**(7) Keywording preview**

In the keywording preview, you can choose from two versions:

- **Keywording preview**: The keywording preview displays an overview of a document's keywording information. You have the option of switching directly to edit mode in this preview. The *Edit keywording* button only appears when the cursor is located within the keywording preview.
- **Form**: A keywording form is displayed. It is possible to directly edit the keywording of an entry via the keywording form.

**(8) Split bar**

The split bar shows margin notes, links and attachments.

The split bar can only be seen when a minimum of one margin note, a link or an attachment is connected to the entry.

**(9) Tree view**

The tree view for displaying contents of the different work areas is located on the left side of the program window:

**(10) Work area bar**

Use the work area bar to select the desired work area. The following work areas are available for selection:

**Repository**: The *Repository* work area is the central work area of the client. File and manage your documents and data here. You can, for example, create new documents and folders, open documents for viewing or send documents in different formats.

**Search**: The search results are displayed in the *Search* work area. A new search view filter is created for every search query, which can be called up any number of times via the button. The search view filters remain in place until the client is closed. Use the *Delete view filter* function to remove an existing search view filter from the *Search* work area.

**Tasks**: The *Tasks* work area contains an overview of your workflows and reminders. The functions of the *Tasks* tab are available to you for editing your workflows and reminders. Here, you can start new workflows, edit and organize existing workflows, set up substitute management and get an overview of your existing tasks.

**Clipboard**: The *Clipboard* work area is a temporary collection list for documents and folders. Use the Clipboard to gather documents short-term or to create a kind of favorite list.

**In use**: The *In use* work area shows documents that have been checked out or that are in use. Documents are locked for all other users while they are in the *In use* work area.

**My ELO**: Feed posts from different entries are collected in the *My ELO* work area. This applies for feeds that a particular user has subscribed to or in which the particular user is mentioned by another user.

The feed posts can be filtered. To do so, the filters in the areas *New since*, *Keywording forms*, *Post creator* and *Post type* are available.

**Information**: If no posts appear in the *My ELO* work area, check the filter settings. There may be no posts for the selected period (under *News since*).

**Counter**

In the work area bar, a counter appears next to the buttons for the *Tasks*, *Clipboard* and *In use* work areas. You see based on the counter how many entries are located in the respective work area. When an entry is added, the counter appears with a green background color.

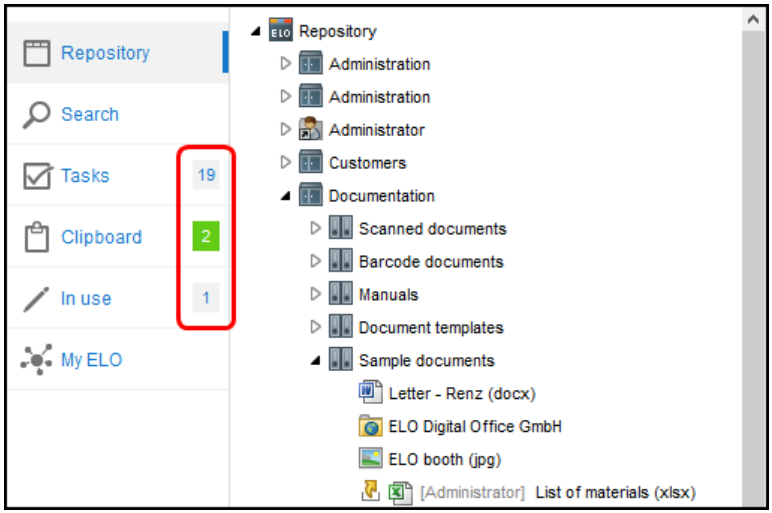



Fig. 7: Counter in the work area bar

**Information**: The refresh interval can be configured for the *Tasks* work area. You can find more information on this in the *Administration* chapter.

## Adjust area sizes

Use the split bar between the areas to adjust their size. To do so, click a bar, hold the button (a double line with two arrows appears) and adjust the area to the desired size. Please note that there is a minimum and maximum width for the window size.

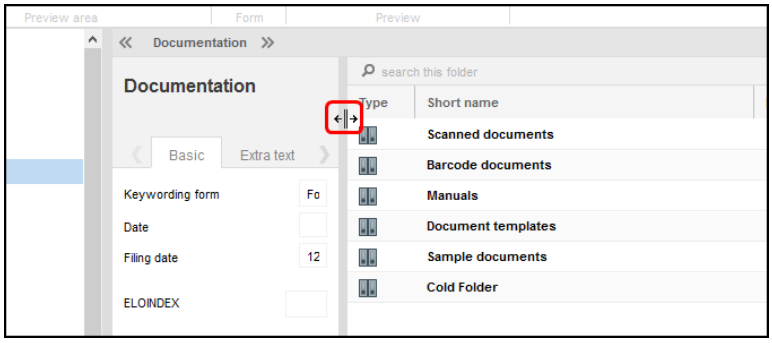



Fig. 8: Icon when moving a separator bar

Double-click the split bar to show or hide areas.

# Examples of use

This chapter will introduce you to the different functions using practical examples in the ELO Web Client. The beginning of the individual sections will provide information on the following:

- **Quick info**: Short description of the usage example.
- **Requirements**: Preparations that need to make and requirements that must be met.
- **Step-by-step**: Description of the actions.
- **Result**: Completes the example of use.

# Filing via drag-and-drop

**Objective**

A document is to be filed to the repository via drag-and-drop.

**Requirements**

You need a document that you would like to file to the repository. The document must be located in a directory on your computer or on a USB stick, etc.

**Step-by-step**

1. Open the *Repository* work area.

2. Select the folder in ELO where you want to file the document.

3. Browse to the document in the file system that you want to file to ELO.

4. Click the document and drag it to the interface of the ELO Web Client.

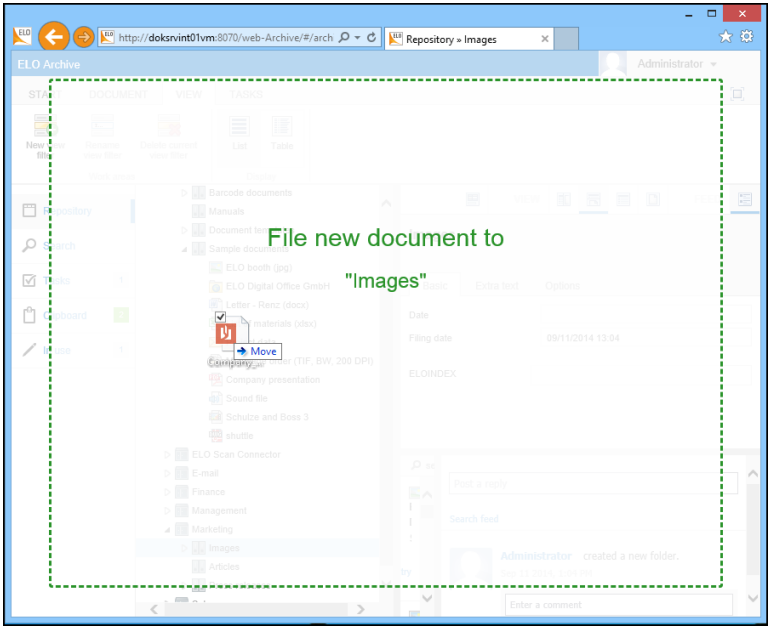



Fig. 9: Drag-and-drop area

In the ELO Web Client, the *File new document to* drag-and-drop area appears. You will also see the name of the folder selected in the ELO repository.

5. Now release the mouse button.

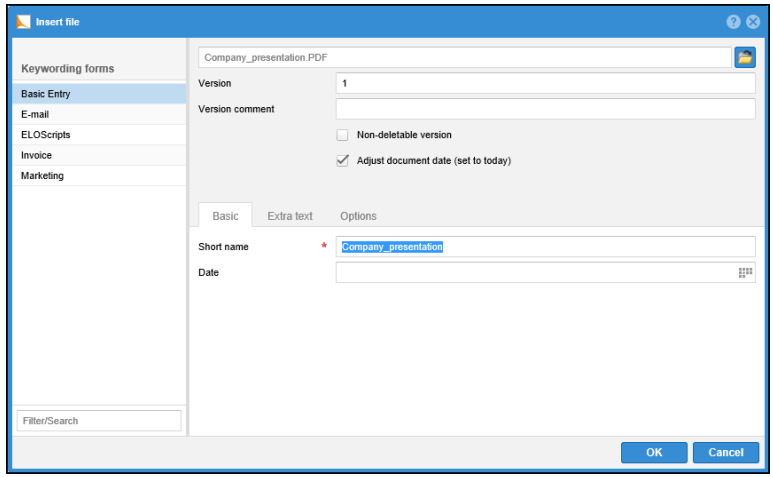



Fig. 10: 'Insert file' dialog

The *Insert file* dialog box appears.

6. Select a keywording form.

7. Keyword the document.

8. Click *OK* to complete the keywording process.

**Result**

The document is filed to the ELO repository.

# Creating a folder

**Objective** Setting up a new folder in the repository.

**Requirements** A new folder can only be added to an existing folder. The topmost repository level also counts as a folder.

**Step-by-step**

1. Choose a level at which the new folder is to be inserted.
2. Click the *New folder* button.

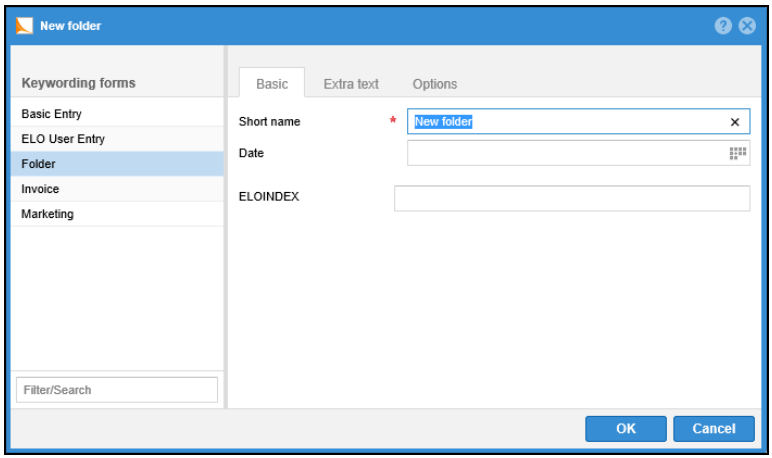



Fig. 11: 'New folder' dialog box

The *New folder* dialog box appears. The *Folder* keywording form is set by default. You can select another form, if needed.

3. Keyword the new folder.
4. Click *OK* to complete the task.

**Result** The message *Folder created* is displayed. The folder has been set up in the repository.

# Insert file

**Objective**

A document is to be field to the repository via the *Insert* file function.

**Requirements**

You need a file that must be filed to the repository. The file must be located in a directory on your computer or on a USB stick.

**Step-by-step**

1. Open the *Repository* work area.
2. Select the folder in ELO where you want to file the document.

Fig. 12: 'Insert file' button

3. Click the *Insert file* button.

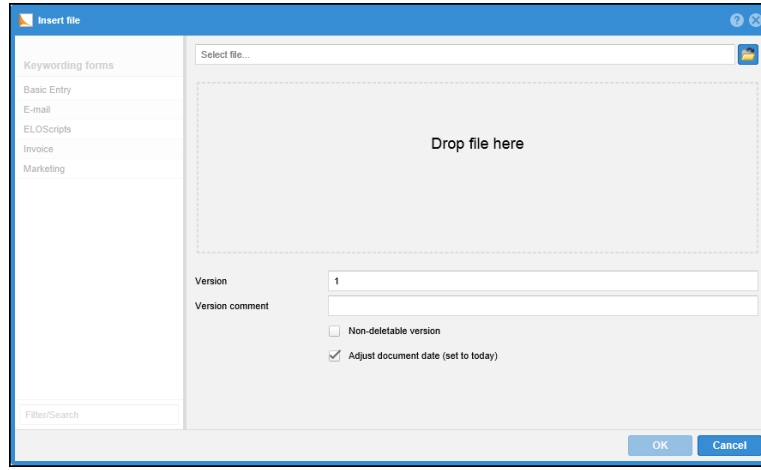



Fig. 13: 'Insert file' dialog box

The *Insert file* dialog box appears.

4. Click the folder icon behind the *Select file* field.

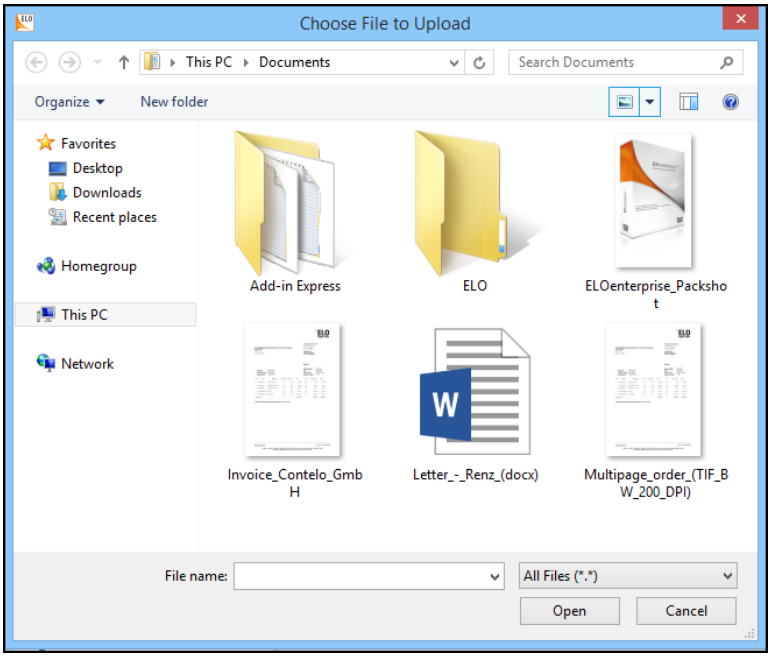



Fig. 14: 'Choose File to Upload' dialog box

The *Choose file to upload* dialog box appears.

5. Select the document and then click *Open*.

**Alternatively (to steps 4 and 5)**: Drag a document from the file system to the *Drop file here* area within the striped lines.

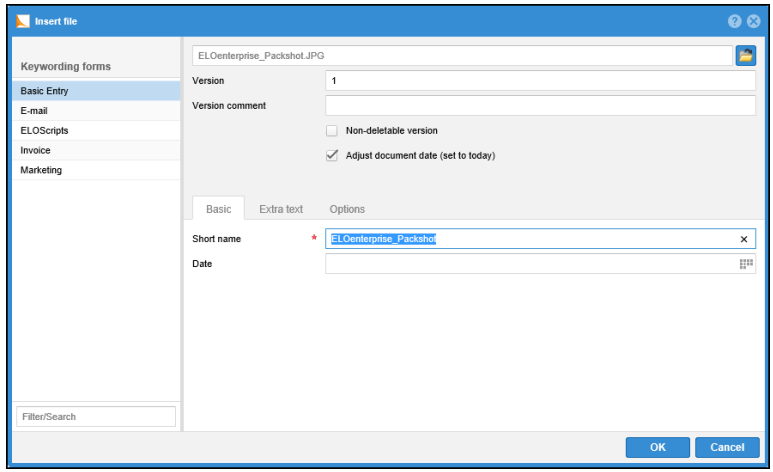



Fig. 15: 'Insert file' dialog box

The *Insert file* dialog box appears in the foreground.

6. Select a keywording form in the *Keywording forms* column.
7. Keyword the document.
8. Click *OK* to finish the process.

**Result**

The dialog box closes and the document is now in the repository.

# Finding documents with the ELO iSearch

**Objective**

A document needs to be found in the repository.

**Step-by-step**

There are different ways of finding documents in the repository. The simplest way is to use the ELO iSearch function in the *Search* work area.

1. Switch to the *Search* work area.

The *Search* tab is active on the ribbon. The *Search* placeholder text is in the search field of the ELO iSearch.

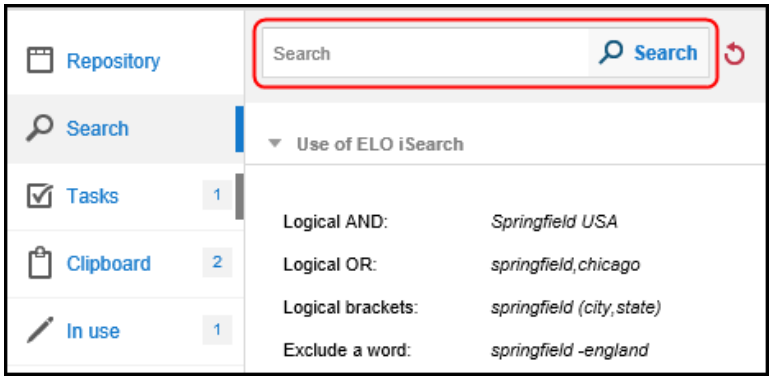



Fig. 16: Search field of the ELO iSearch

2. Click in the search field of the ELO iSearch.

The search field is active. The cursor in the search field blinks.

3. Enter a search term.

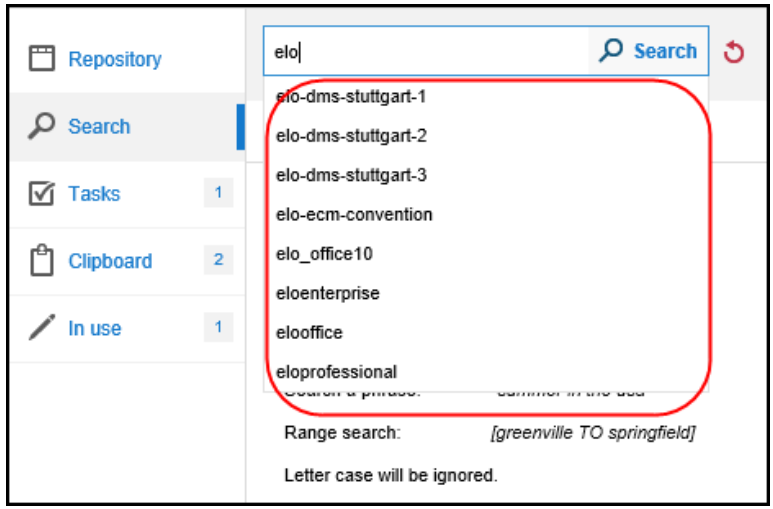



Fig. 17: Search suggestions of the ELO iSearch

As soon as you enter the first letters of the search term, ELO iSearch attempts to provide you with appropriate suggestions. If ELO iSearch finds corresponding terms, a drop-down menu opens with suggestions. If you enter additional letters, ELO iSearch updates the suggestions accordingly.

4. Click a term.

The search term is entered to the search field. The search starts immediately.

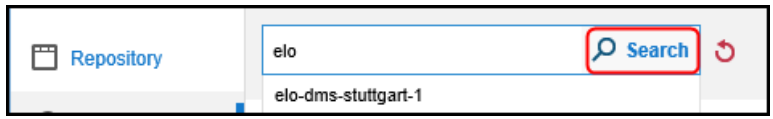



Fig. 18: 'Search' button

**Alternatively**: When you do not want to select any of the suggestions, but want to use the exact search term that you entered, click the *Search* button.

**Result**

The search results appear in the *Search* work area below the search field.

**Filters**

The ELO iSearch offers the option of adding filters. These filters can be used to refine the search.

Fig. 19: Filters in the ELO Web Client

The ELO Web Client offers the following filters:

**Date**: Only entries are shown as results that have the selected document date.

**Form**: Only entries are shown as results that were keyworded with the selected keywording form.

**Object type**: Only entries with the selected object type are displayed as hits (such as: folder, image document, Word document, ...).

**Filed by**: Only entries are shown as hits that were filed by a specific user.

**Editor**: Only entries are shown as hits for which the selected user is entered as the editor.

**Filing date**: Only entries are shown as results that have the selected filing date.

**Index field**: Only entries are shown as hits for which the search term appears in the selected index field.

**Add filter**

The different filters can be inserted according to a simple principle. We will demonstrate this in the following using the *Date* filter.

1. Click the *Date* button.

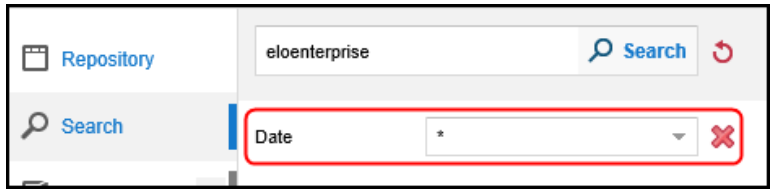



Fig. 20: 'Date' filter field

The *Date* filter field appears below the search field of the iSearch. The placeholder * appears in the filter field.

2. Click the arrow icon after the field.

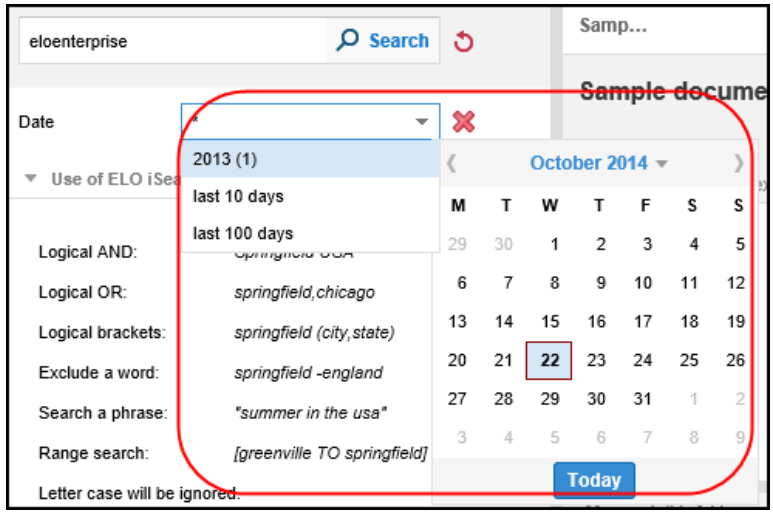



Fig. 21: Drop-down menu and calendar field

A drop-down menu and a calendar field appear.

**Information**: The selection options vary depending on the filter.

In the drop-down menu, you see a list with the periods or years. The number of possible results is listed in parentheses.

A precise date may be selected in the calendar field.

3. Click a period, year or date.

**Information**: The *Select index field* dialog box appears for the *Index field* filter. Use this dialog box to first choose a keywording form and then an index field.

The selected setting appears in the filter field.

4. Click the *Search* button.

The search process starts. The search results appear in the *Search* work area.

## Combine filters

The filters can be combined in different ways:

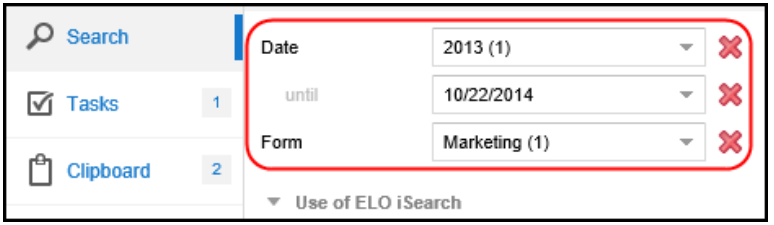



Fig. 22: Combined filters

**Several different filters**: By combining various filters, you can limit the search results using multiple criteria. This allows you to create very precise search requests.

**Multiple filters of one type**: Use multiple filters of the same type to expand the filter. For example, two *Date* filters allow a from-until search. Multiple *Object type* filters allow for a search with an OR connection between the two selected object types.

## Adding filters via the faceted search

The ELO Web Client offers an additional option for working with filters, if required. The *faceted search*. When the faceted search is active, dynamically generated filter suggestions appear below the ELO iSearch search field.

**Information**: The faceted search must be configured via the configuration. You can find more information on this in the *Administration* chapter.

This is how you use the faceted search:

1. Enter a search term to the ELO iSearch search field.

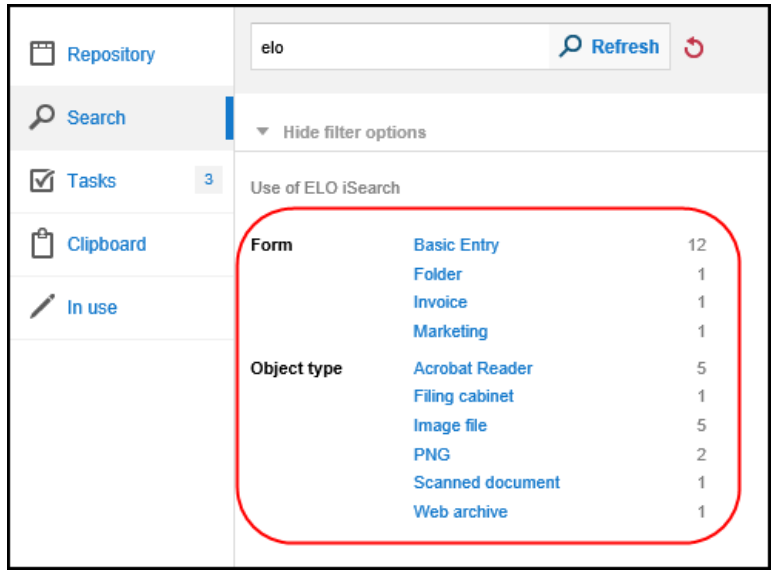



Fig. 23: Faceted filter below the ELO iSearch search field

Possible filters appear below the search field. They are organized by filter types. You can recognized behind the respective filter based on the number how many possible hits can be found via the respective filter.

**Information**: If no filters are displayed, there either are no filter options or the filter options are hidden. When the filter options are hidden, click *Show filter options*.

2. Click a filter.

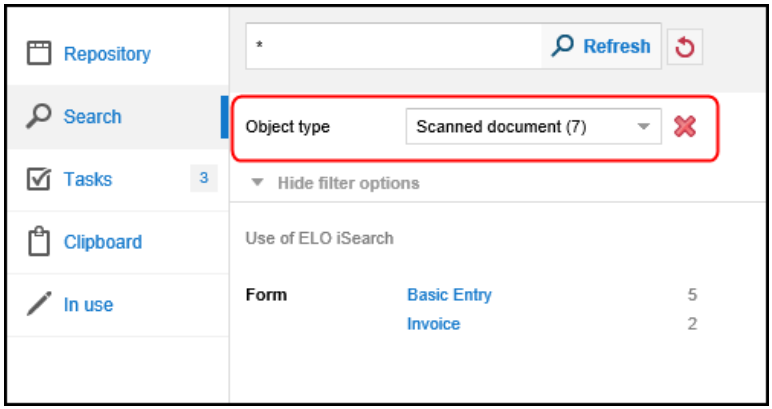


Fig. 24: Added filter

The filter is inserted below the search field. The filter can be removed via the X icon.

Depending on the selection, you see additional filter options or the filtered search result.

**Optionally**: Repeat step 2, if required, until you have restricted the results list to the desired extent.

# Searching via the ELO Click OCR

**Objective**

The ELO Click OCR can be used as follows for searching:

- A) Starting the search via ELO Click OCR in the *Repository* work area.
- B) Starting the search via ELO Click OCR in the *Search* work area.

**Requirements A)**

You are **not** in the *Search* work area.

**Step-by-step A)**

1. Click the document from which you want to start a search.

The document appears in the viewer pane.

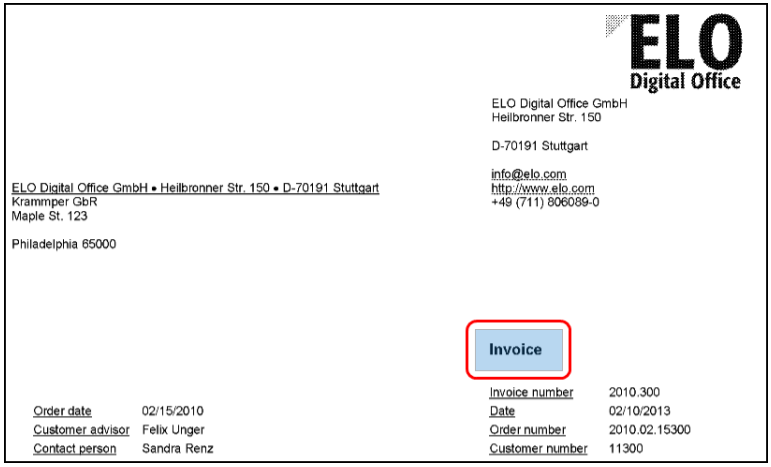



Fig. 25: Set OCR area

2. Press the CTRL + ALT key and the left mouse button. In the viewer pane, draw a frame around the information in the document that you want to use for the search.

3. Let the keys go.

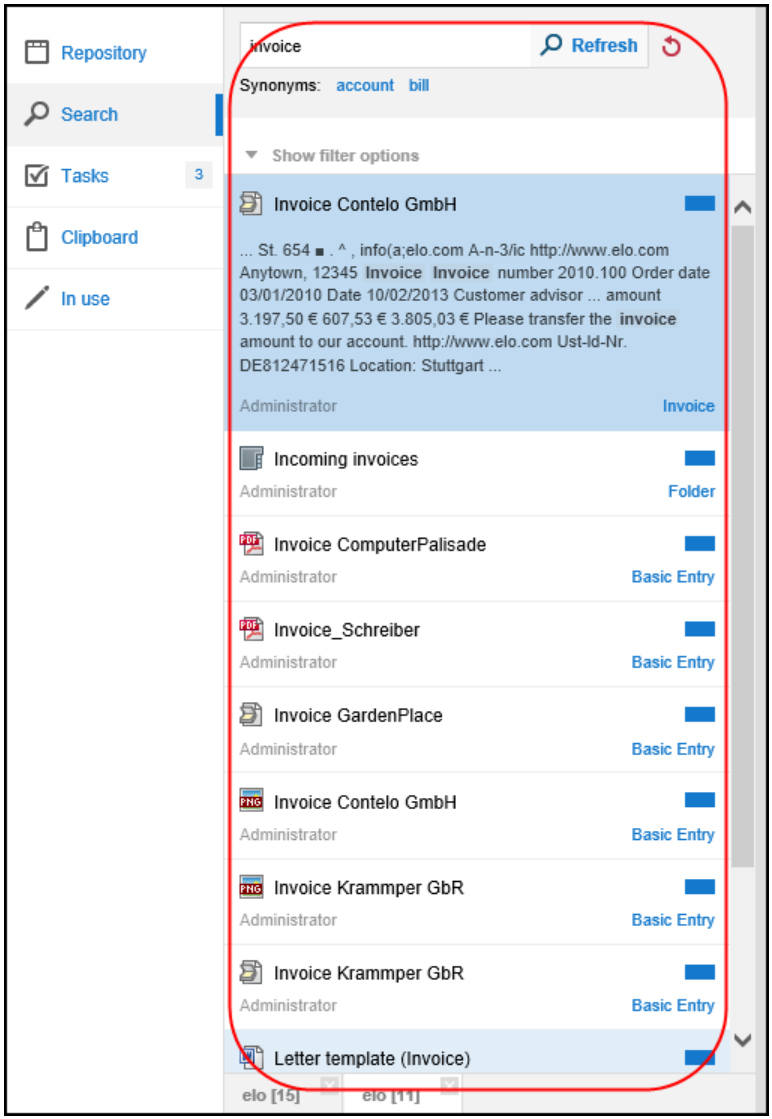



Fig. 26: Result of the search

**Result A)**

The ELO Web Client starts a search process with text information that was read from the OCR. You are forwarded to the *Search* work area. The search results appear here.

**Requirements B)**

You have selected a document: It is displayed in the viewer pane. You are in the *Search* work area.

**Step-by-step B)**

1. Click in the search field of the ELO iSearch.

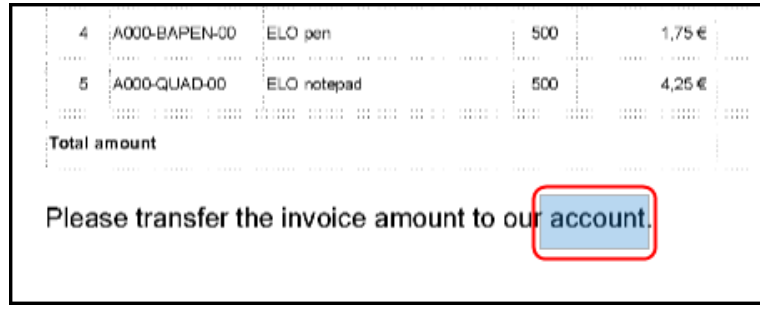



Fig. 27: Set OCR area

2. Draw a frame in the viewer pane while holding the CTRL key and left mouse button around the information in the document that you want to search for.

**Information**: If you want to add multiple terms after another, select each individual term while holding CTRL + SHIFT + LEFT MOUSE BUTTON. Release the mouse button after each term. Repeat the process until you have transferred all desired terms.

3. Let the keys go.

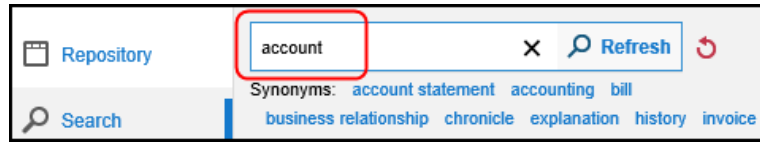



Fig. 28: Recognized search term in the search field

ELO Click OCR reads the text contents of the selected area. The recognized text information is used in the search field. The search starts.

**Result B)**

The search result appears in the *Search* work area.

# Add margin note

**Objective**

A margin note needs to be affixed to a document or folder.

Choose from three types of margin notes:

- **General margin note (yellow)**: Can be created and edited by all users.
- **Personal margin note (green)**: Only the creator can read and edit this type of margin note.
- **Permanent margin note (red)**: This margin note cannot be removed from the document.

In this example, we will describe how to proceed based on a personal margin note. Create different types of margin notes using the same principle.

**Information**: Margin notes appear on the split bar. They refer to all pages of a document.

For further information on these notes, refer to the *Functions* chapter, *Creating margin notes*.

**Requirements**

You need a document to which a margin note should be affixed.

**Step by step**

1. Switch to the *Repository* work area.

2. Open the folder with the document to which you want to affix the margin note.

3. Click the document.

The document is shown in the viewer pane.

4. Click the *Document* tab of the ribbon.

Fig. 29: 'Margin notes' group on the ribbon

5. Click the *Personal margin note* button.

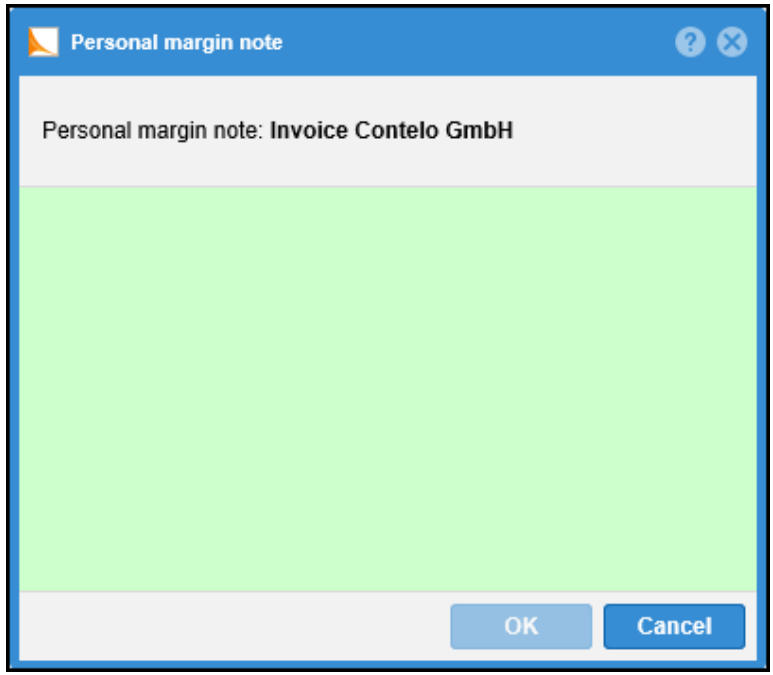



Fig. 30: 'Personal margin note' dialog box

The *Personal margin note* dialog box appears.

6. Enter the text for your margin note and click *OK*.

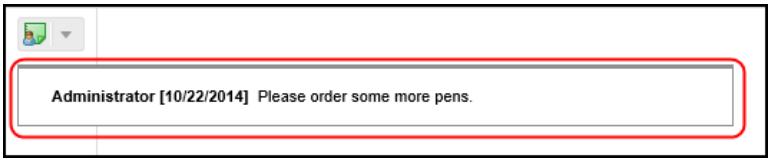



Fig. 31: Display of the created margin note

**Result**

The margin note has been created and is shown as an icon on the split bar. The content of the margin note will be displayed when the cursor is pointed to the margin note icon.

**Edit margin note**

1. Click the icon of the particular margin note on the split bar.

The *Personal margin note* dialog box appears.

2. Change the contents of the margin note.

3. Confirm the changes with *OK*.

The dialog box closes. The changes are applied.

**Delete margin note**

1. Click the arrow icon behind the particular margin note on the split bar.

The *Delete* button appears.

2. Click Delete.

ELO deletes the margin note. The notification *Margin note deleted* appears at the top of the screen.

# Edit document

**Objective**

An existing document is to be edited and filed again to the repository as the newest version.

**Step by step**

1. Open the *Repository* work area.

2. Navigate to the document that you want to edit.

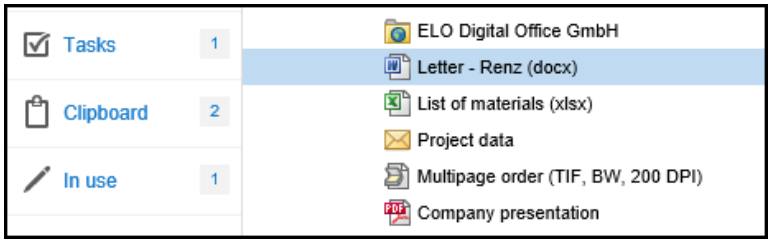



Fig. 32: Selected document

3. Click the document.

Depending on the file type and presets, the document can be displayed in the viewer pane or a note appears that the document cannot be displayed.

Fig. 33: 'Check out' button

4. Click *Check out* (*Ribbon* > *Start*).

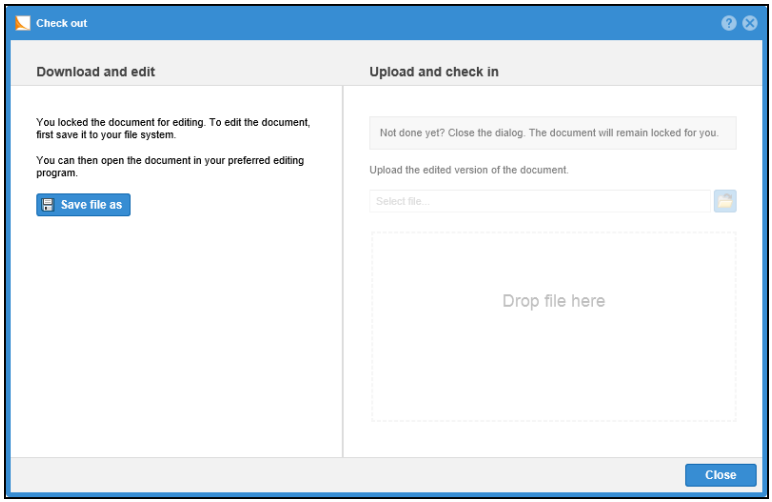



Fig. 34: 'Check out' dialog box

The *Check out* dialog box appears.

5. Click *Save file as*.

**Optionally**: A Windows dialog box may appear. Select an option for saving the document.

**Caution**: You absolutely must save the document to your computer. This save process is absolutely necessary for uploading and checking in a new version to the repository. If you do not save the document, all changes made will be lost.

6. Open the document saved on your computer.

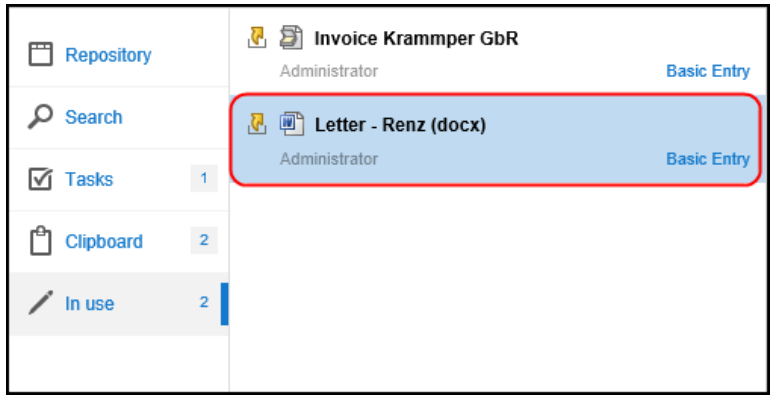



Fig. 35: Locked document

The document appears in the *In use* work area in the ELO Web Client. The document is checked out and cannot be edited by other users.

**Information**: You can recognize checked out documents by the yellow arrow symbol.

7. Make the desired changes.
8. Save the document.
9. Mark the original document in the ELO repository.
10. Holding down the left mouse button, click the document and drag it to the interface of the ELO Web Client.

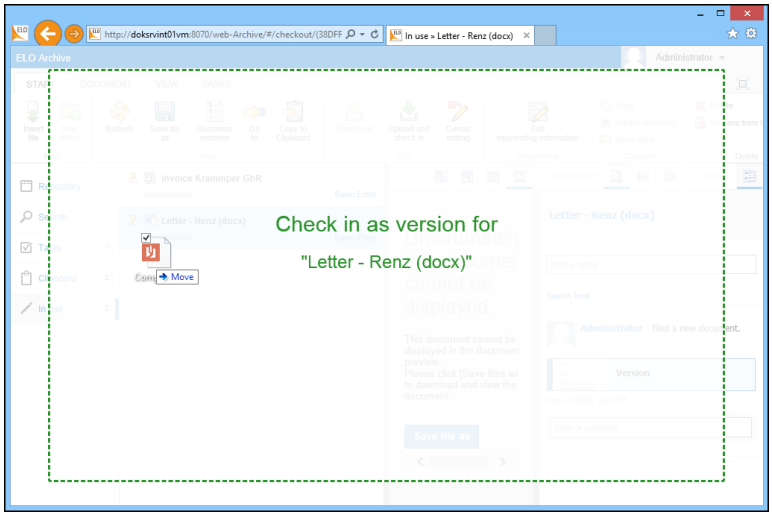



Fig. 36: Drag-and-drop area

The *Check in as version for* drag-and-drop area appears.

11. Release the left mouse button.

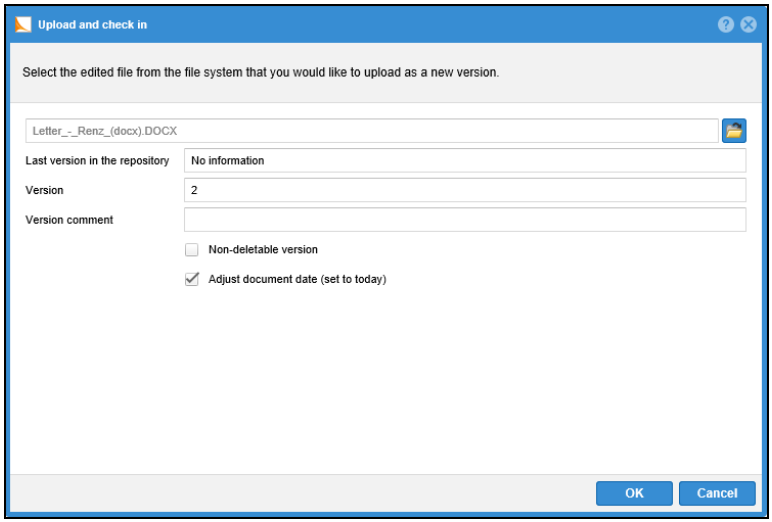



Fig. 37: 'Upload and check in' dialog

The *Upload and check in* dialog box appears.

**Optionally**: Make the desired changes for the version, if required.

12. Confirm with *OK*.

Fig. 38: Event in the feed

**Result**

The dialog box now closes. The document is now back in the repository. It is no longer located in the *In use* work area. An event notification for the new version appears in the feed.

# Functions

This chapter contains an alphabetical overview of the ELO Web Client functions. A description of where each function is located is shown next to the function.

**Information**: Some functions can be opened in multiple ways, such as from the context menu for a specific work area. In order to keep the descriptions short and to the point, not all possible methods are described.

# Function overview

**'Date' filter**

Available in: *Search work area > Ribbon > Search*

Use the *Date* function to add a *Date* filter to the current search.

Only entries are shown as results that have the selected document date.

**'Editor' filter**

Available in: *Search work area > Ribbon > Search*

Use the *Editor* function to add an *Editor* filter to the current search.

Only entries for which the selected user is entered as the editor are shown as hits.

**'Filed by' filter**

Available in: *Search work area > Ribbon > Search*

Use the *Filed by* function to add a *Filed by* filter to the current search.

Only entries are shown as hits that were filed by a specific user.

**'Filing date' filter**

Available in: *Search work area > Ribbon > Search*

Use the *Filing date* function to add a *Filing date* filter to the current search.

Only entries that have the selected filing date are shown as results.

**'Form' filter**

Available in: *Search work area > Ribbon > Search*

Use the *Form* function to add a *Form* filter to the current search.

Only entries are shown as results that were keyworded with the selected keywording form.

**'Index field' filter**

Available in: *Search work area > Ribbon > Search*

Use the *Index field* function to add an *Index field* filter to the current search.

Index field: Only entries for which the search term appears in the selected index field are shown as hits.

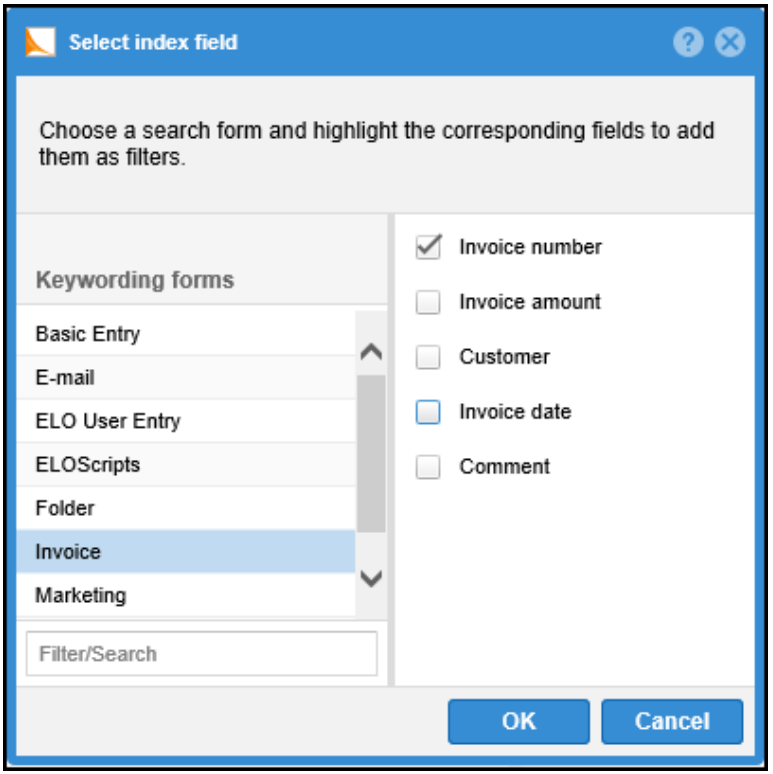


Fig. 39: 'Select index field' dialog box

When you apply the *Index field* filter, the *Select index field* dialog box appears. Use this dialog box to first choose a keywording form and then an index field.

**'Object type' filter**

Available in: *Search work area* > *Ribbon* > *Search*

Use the *Object type* function to add an *Object type* filter to the current search.

Only entries with the selected object type are displayed as hits (such as: folder, image document, Word document, ...).

**About**

Available in: *User account* > *ELO menu*

Opens a window with information on the currently used version of the ELO Web Client.

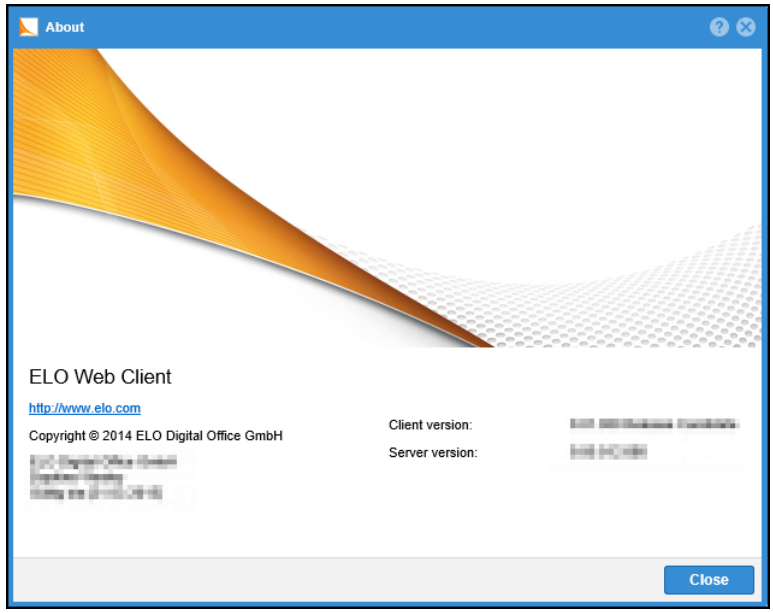



Fig. 40: 'About' dialog box

## Accept substitution

Available in: *Ribbon* > *Tasks*

Use this function to open the *Accept substitution* dialog box. In this dialog box, you accept substitutions for other users.

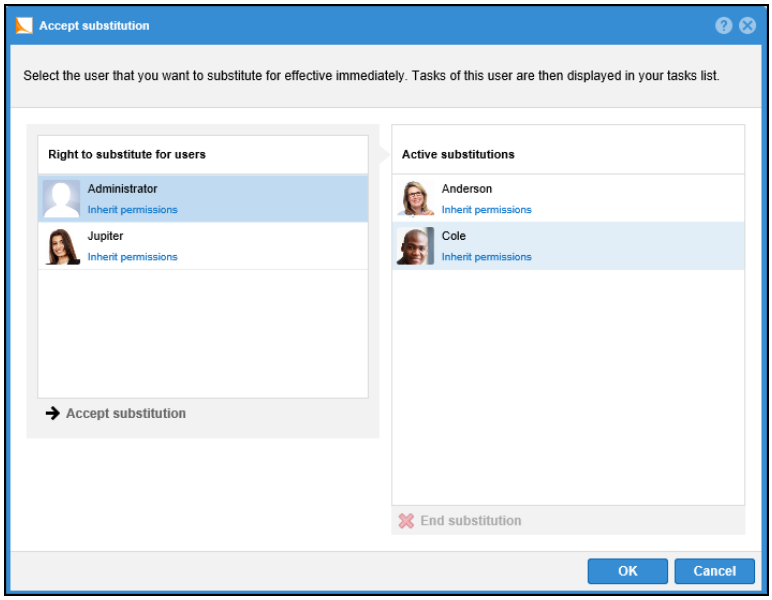



Fig. 41: 'Accept substitution' dialog box

The *Accept substitution* dialog box contains the following areas:

**Right to substitute for users**

All users for whom you can accept a substitution appear in this area.

Click *Accept substitution* to take on the substitution for the selected user. The user appears in the *Active substitutions* area.

**Active substitutions**

This area shows all users you are currently substituting for.

Use the *End substitution* button to end the active substitution for the selected user. You continue to have the right to substitute.

**Accept workflow**

Available in: *Tasks work area* > *Ribbon* > *Tasks*

A group member can use this function to accept a workflow which has been assigned to the group. After accepting, the task is removed from the *Tasks* work area of the other group members.

**Ad hoc workflow**

Available in: *Ribbon* > *Tasks*

Use the *Ad hoc workflow* function to start the dialog box for creating an ad hoc workflow.

Ad hoc workflows are predefined by ELO and can be set up with relatively little effort. However, this restricts the design options as compared to standard workflows.

**Add attachment**

Available in: *Ribbon > Document*

This opens a dialog box with which you can add a file attachment to a document.

You select a file from the file system using the Add attachment dialog box. This file is added to the document as an attachment. You have the following options for selecting the file:

**Via drag-and-drop**: Drag the file to the *Drop file here* area.

**Via selection dialog box**: Click the folder icon and choose a file.

When there is an attachment for a document, the clip icon appears on the split bar.

Click the paper clip icon on the split bar to start the process of opening the current attachment.

**Assign substitute**

Available in: *Ribbon > Tasks*

Use this function to open the *Assign substitute* dialog box. Define in this dialog box who may take on the substitution for your tasks.

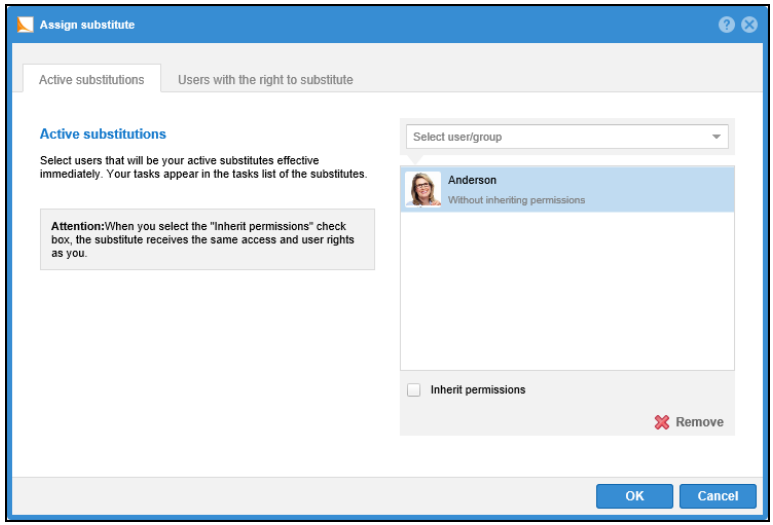


Fig. 42: 'Assign substitute' dialog

The *Assign substitute* dialog box has the following tabs:

### Active substitutions

To assign a user as an active substitute, select a user via the drop-down menu in the *Select user/group* field. An active substitution applies immediately. Everyone that appears in the *Active substitutions* list can take on your tasks.

**Optionally**: Select the *Inherit permissions* option. Permissions that are assigned to you are transferred to the substitute as soon as the substitution becomes active. The permissions may be required to complete substitution tasks.

Click *Remove* to end the substitution by the selected user.

### Users with the right to substitute

To assign a user as an active substitute, select a user via the drop-down menu in the *Select user/group* field. If users have the right to substitute, they can accept a substitution, if necessary. When users take on the substitution, they are displayed in the *Active substitutions* list on the *Active substitutions* tab.

**Optionally**: Select the *Inherit permissions* option. Permissions that are assigned to you are transferred to the substitute as soon as the substitution becomes active. The permissions may be required to complete substitution tasks.

Click *Remove* to revoke the substitution right from the selected user.

**Information**: You can also set user groups as substitutes.

**Attachments**

Available in: *Ribbon* > *Document*

Use the *Attachments* function to open the *Attachments* dialog box.

The *attachments* dialog box offers the following options:

- You get an overview of the attachments of a document.
- You can open attachments for viewing.
- You can delete attachments.

**Cancel**

Available in: *Ribbon* > *Clipboard*

Closes the Clipboard tab. The previously run function (*Copy*, *Create reference* or *Move entry*) is canceled.

**Change password**

Available in: *User account* > *ELO menu*

Opens the *Change password* dialog box. Use this dialog box to change your ELO password.

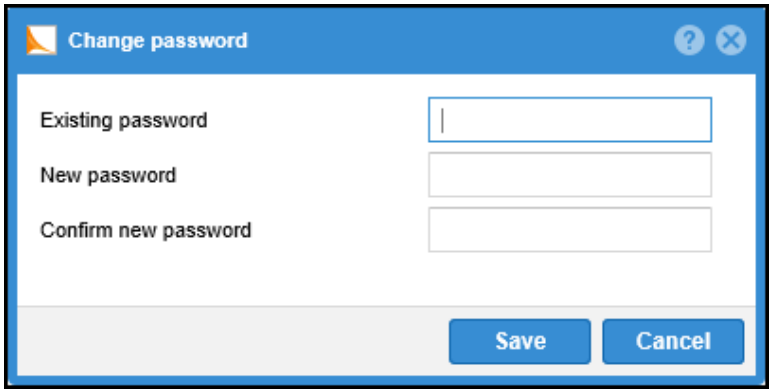


Fig. 43: 'Change password' dialog box

**Check out**

Available in: *Ribbon* > *Start*

Opens a dialog box that locks the selected document for editing.

Checked out documents are located in the *In use* work area. You can recognize checked out documents by the small yellow arrow icon. Checked out documents must be checked in so that they are available for editing by other users.

**Configuration**

Available in: *User account* > *ELO menu*

Opens the configuration page of the ELO Web Client.

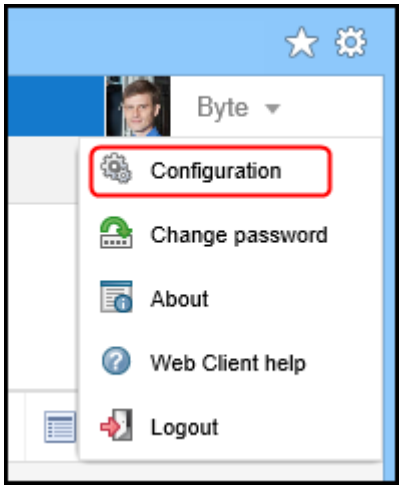


Fig. 44: 'Configuration' button in the ELO menu

**Copy**

Available in: *Ribbon* > *Start*

Use the *Copy* function to create a copy of the entry.

1. Click the document in the repository that you want to copy.

2. Click the *Copy* button.

**Alternatively**: Right-click a document in the repository and select *Copy* from the context menu.

The *Clipboard* tab appears.

3. Click the folder in the repository that should serve as the target folder.

The name of the folder is displayed in the *Target folder* field.

**Optionally**: Click the *Copy options* button to change the settings for the copy process.

4. Click *Insert copy*.

The copy is created in the target folder.

**Copy folders**

The following options can be selected in addition when copying a folder:

**Only the basic entry**: Only copies the selected folder. Child entries are not copied.

**Only folder structure**: Copies the selected folder and all subfolders but no documents.

**Folder structure and documents**: Copies the folder with all child entries.

**Copy options**

*Ribbon > Clipboard*

Use the *Copy options* function to open a drop-down menu with which you make the changes for the copy process.

The *Clipboard* tab appears after you have run the *Copy* function. The *Insert copy* button is active as soon as you have selected a target folder in the repository.

The following options are available:

**References (only for folders)**: References are also copied.

**Keep notes**: Notes are kept when copying.

**All document versions**: All versions of the document are copied.

**Attachments**: At least the currently active attachment is included.

**Attachment versions**: All attachments are included.

**Keep user in the "Filed by" and "Editor" field**: The creator and the current user are taken from the original document.

**Copy folder**

**Copy to Clipboard**

Available in: *Ribbon > Start*

Transfers the selected entry to the Clipboard.

The Clipboard is used to gather documents and folders of your repository. This way, you can use the entries on the Clipboard similarly to bookmarks in a browser.

Entries can be checked out for editing, copied, referenced and moved from the Clipboard.

**Create external link**

Available in: *Ribbon > Document*

Use the *Create external link* function to allow persons without ELO to access a document. The document is provided via the Indexserver.

**Please note**: To offer external links via the Internet, you need to configure the ELO Web Client Internet Access. Refer to a separate developer documentation on the SupportWeb for detailed information on the configuration of the ELO Web Client.

The following settings are possible:

**Available until**: Define a deadline until which the document should be available for an external user.

**Available for an unlimited amount of time**: This function makes the document available for an unlimited amount of time.

**Restrict number of accesses to**: Use this option to determine the number of accesses (downloads) to the document.

**Create margin note**

Available in: *Split bar context menu*

Margin notes can alternatively be created via the split bar.

The only difference is in the fact that you do not choose the type of note via the ribbon but via the context menu of the split bar. Open the context menu of the split bar by right-clicking the split bar.

**Create reference (a)**

Available in: *Ribbon* > *Start*

Open the *Reference* tab via the *Create reference* function. Use the tab to select the target folder in which the reference should be created.

1. Select the document in the repository for which you want to create a reference.

2. Click *Create reference*.

**Alternatively**: Right-click a document in the repository and select *Create reference* from the context menu.

The *Clipboard* tab appears.

3. Click the folder in the repository that should serve as the target folder.

The name of the folder is displayed in the *Target folder* field.

4. Click *Create reference*.

The reference is created. You can recognize it by the document type icon with an arrow.

**Create reference (b)**

Available in: *Ribbon* > *Clipboard*

Creates a reference to the original entry of a document in the selected target folder.

The *Clipboard* tab appears after you have run the *Create reference* function. The *Create reference* button is active on the *Clipboard* tab as soon as you have selected a target folder in the repository.

**Delegate workflow**

Available in: *Tasks work area* > *Ribbon* > *Tasks*

This button opens the *Delegate workflow* dialog box. You define here who is to take on the editing of the workflow node. An additional node appears in the workflow diagram. Choose whether you want to receive a notification after editing.

**Notify after processing the node**: You will receive a notification after the workflow is processed. This gives you the option to check the processing status before you pass forward the workflow to the next node.

**Delete**

Available in: *Ribbon* > *Start*

This function deletes an entry, a reminder, or an active workflow.

The function is available in different contexts (ribbon, context menu, dialog boxes, etc.).

**Information**: A confirmation request appears before deletion. The displayed confirmation request differs depending on the selected object.

**Delete current view filter**

Available in: *Ribbon* > *View*

Use the *Delete view filter* function to remove the selected view filter from the work area bar.

**Information**: The *Delete view filter* function does not delete any entries.

**Delete margin note**

Available in: *Split bar context menu*

General and personal margin notes can be deleted as follows:

1. Click the arrow icon behind the particular margin note.

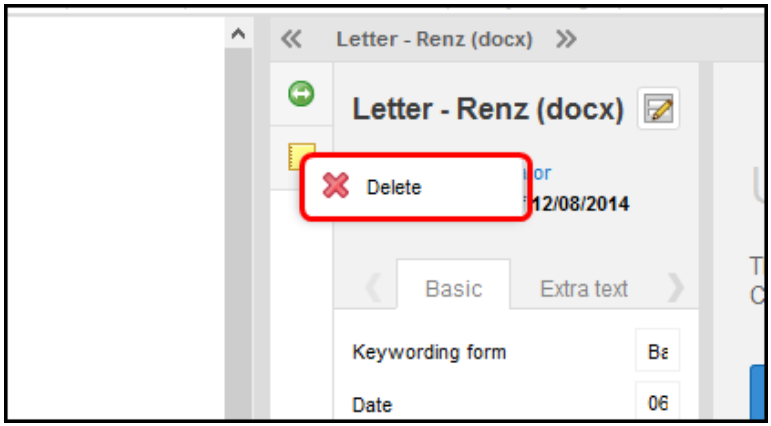


Fig. 45: Delete margin note

The *Delete* button appears.

2. Click *Delete*.

The margin note is deleted.

**Display workflow**

Available in: *Tasks work area* > *Ribbon* > *Tasks*

Click a workflow node to get more information on the node settings.

**Document versions**

Available in: *Ribbon* > *Start*

Opens a dialog box with a list of the document versions for the currently selected document.

The following functions can be called up via the *Document versions* dialog box:

**Open in read-only mode**: Open the selected document version in an external program.

**Delete version**: Deletes the selected document version. Deleting is only possible when the selected version is neither the current working version nor a non-deletable version.

**Set as working version**: Make the selected version the working version. The status of this version can be seen in the repository. If the document is checked out for editing, only the working version can be edited.

**Set as non-deletable version**: The selected version can no longer be deleted (closed lock icon).

**Edit in Office**

Available in: *Ribbon* > *Start*

Use the *Edit in Office* function to open Microsoft Office documents directly in Microsoft Office for editing.

**Information**: Microsoft 2010 with Service Pack 1 is required at a minimum.

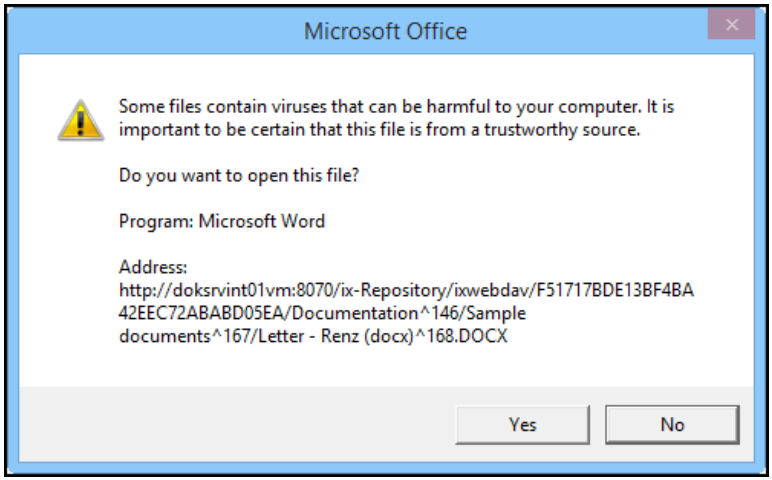



Fig. 46: Microsoft Office warning dialog box

**Information**: A warning dialog box from Microsoft Office may appear. Confirm the dialog box with *Yes*.

A new version is created automatically when you save the Microsoft Office document. This process avoids the need of having to upload the document after you are done editing it. However, you should remove the document lock (*Ribbon* > *Start* > *Cancel editing*) once you are done editing the document.

**Edit reminder**

Available in: *Tasks work area* > *Ribbon* > *Tasks*

Use this function to edit a reminder.

**Escalations**

Available in: *Ribbon* > *Tasks*

When the *Escalations* option is selected, tasks appear in the tasks list that you were assigned as the escalation manager.

**Favorites**

Available in: *Search work area* > *Ribbon* > *Search*

Search processes can also be saved as favorites. You can use favorites to call up often-used search processes at any time.

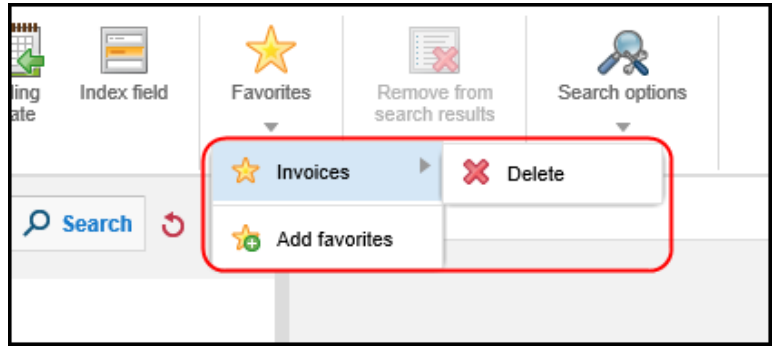



Fig. 47: Drop-down menu for managing favorites

The *Favorites* button opens a drop-down menu. The drop-down menu gives you access to:

**List of existing favorites**: You see all saved favorites in the top part of the drop-down menu.

**'Add favorites' function**: Use this function to add the current search to your favorites.

**'Delete' function**: Appears when you point to a favorite. Use this function to delete the selected favorite.

**Full text database**

Available in: *Ribbon* > *View*

When the *Full text database* function is selected, the recognized text appears in the viewer pane. If the function symbol is grayed out, no full text can be shown for the respective entry.

**Information**: To be able to display full text information, the document must have been read with OCR (optical character recognition), e.g. using the *Add to full text database* function in the ELO Java Client.

**General margin note**

Available in: *Ribbon* > *Document*

Use this function to create general margin notes. The default color for general margin notes is *yellow*. They can be created and edited by all users.

In addition, there are personal margin notes (default color green) and permanent margin notes (default color red).

**Information**: You can create margin notes for both folders and documents.

**Go to**

Available in: *Ribbon* > *Start*

This function jumps to the selected entry in the *Repository* work area.

If the document is not available in the tree view, then the path to the server is queried, and the repository will be reloaded.

**Group tasks**

Available in: *Ribbon* > *Tasks*

When the *Group tasks* option is selected, tasks appear in the tasks list that you were assigned via a group.

**Hand off workflow**

Available in: *Tasks work area* > *Ribbon* > *Tasks*

This button opens the *Hand off workflow* dialog box. You define here who is to take over the workflow node. In the workflow diagram, the new editor for your workflow node is entered.

**Horizontal**

Available in: *Ribbon* > *View*

When the *Horizontal* function is selected, the keywording preview or form preview is shown via the document preview.

**Information**: This function appears by default on the ribbon. This function corresponds to the *Show keywording and document preview stacked* button on the preview bar. If you want the buttons to appear on the preview bar, you need to go to *Configuration* > *Display* > *Appearance* and deselect the *Show icons for the preview area on the ribbon* option.

**Image preview**

Available in: *Ribbon* > *View*

If the *Image preview* function is selected, the respective preview document appears in the viewer pane. If the function symbol is grayed out, no preview document is available.

**Information**: The preview documents need to be created in advance for most formats, e.g. using the *Create preview document* function in the ELO Java Client.

**Insert copy**

Available in: *Ribbon* > *Clipboard*

Inserts an entry as a copy to the selected target folder.

The *Clipboard* tab appears after you have run the *Copy* function. The *Insert copy* button is active as soon as you have selected a target folder in the repository.

**Insert file**

Available in: *Ribbon* > *Start*

Inserts a new document into the ELO repository.

**Information**: A file can only be inserted into a folder.

**Keywording**

Available in: *Ribbon* > *Start*

Opens the *Keywording* dialog box. You edit and add keywording information of an entry in this dialog box.

**Keywording (Keywording preview only)**

Available in: *Ribbon* > *View*

When the *Keywording (Keywording preview only)* option is selected, only the keywording preview appears in the viewer pane.

**Leave configuration**

Available in: *User account* > *ELO menu*

Use this function to leave the configuration. This function is only available when you are on the configuration page of the ELO Web Client.

**Link (a)**

Available in: *Ribbon* > *Document*

Use this function to set, remove and edit links.

1. Click a document in the repository.
2. Click the *Document* tab.
3. Click *Link*.

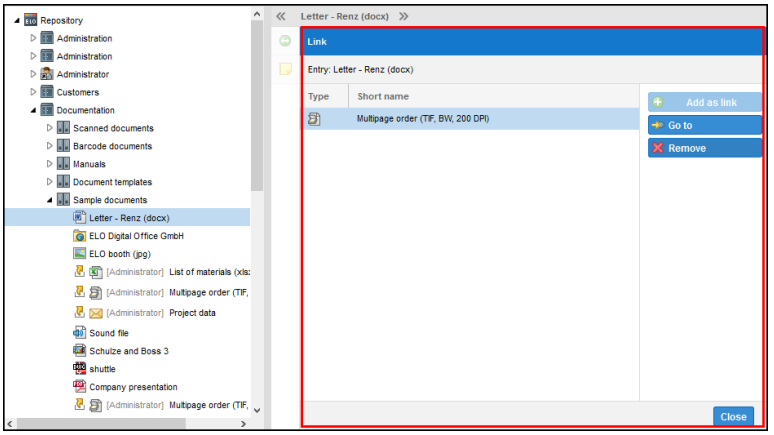



Fig. 48: 'Link' embedded dialog box

The *Link* dialog box embedded in the viewer pane appears.

**Please note**: Some functions of the ELO Web Client are deactivated while the *Link* dialog box is active.

4. Select the document you want to link and click *Add as link*.

The linked document is displayed in the embedded *Link* dialog box.

The following functions are available as soon as you have created a link:

**Go to**: Jumps to the selected linked document.

**Delete**: Deletes the selected link.

**Close**: Close the embedded *Link* dialog box.

**Link (b)**

Available in: *Split bar*

Use the *Link* function to open the embedded *Link* dialog box. You see here which links exist.

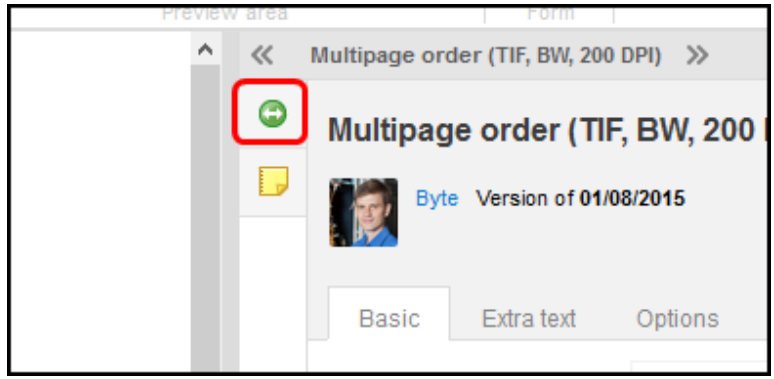



Fig. 49: Link icon on the split bar

The following buttons are available to you:

**Add as link**: When you select an entry in the repository tree, the *Add as link* button becomes active. Use the *Add as link* button to establish a link between the currently selected entry and the originally selected entry.

**Go to**: Jumps to the selected linked document.

**Delete**: Deletes the selected link.

**Close**: Close the embedded *Link* dialog box.

**List**

Available in: *Ribbon* > *View*

Use the *List* function to set up the viewer pane in such a way that the contents of a folder is displayed as a list. This is called the *list view*.

**Load new version**

Available in: *Ribbon* > *Document*

Use this function to load a file from your computer and file it as a new version of a document to the repository in the Repository work area. Using this option for version-controlled documents creates a new entry in the version history and makes this new version the current working version. When doing this with a document that is not version controlled, the previous version will be overwritten.

**Logout**

Available in: *User account* > *ELO menu*

Closes the current session and redirects the user to the logon page.

**Move entry (a)**

Opens the *Clipboard* tab to select a target folder for the selected document.

*Ribbon > Start > Move entry*

1. Select an entry in the repository.

2. Click *Move entry*.

**Alternatively**: Right-click an entry in the repository and select *Move entry* from the context menu.

The *Clipboard* tab appears.

3. Click the folder in the repository that should serve as the target folder.

The name of the folder is displayed in the *Target folder* field.

4. Click the *Move entry* button.

The entry is moved and inserted into the target folder selected previously. The entry is inserted in the target folder selected previously.

**Move entry (b)**

Available in: *Ribbon > Clipboard*

Moves an entry to the selected target folder.

The *Clipboard* tab appears after you have run the *Move entry* function. The *Move entry* button is active on the *Clipboard* tab as soon as you have selected a target folder in the repository.

**New folder**

Available in: *Ribbon > Start*

Creates a new folder entry in the ELO repository.

**Information**: A new folder can only be inserted into an existing folder. The function is only active when you have selected a folder or the topmost repository level in the repository. The topmost repository level also counts as a folder.

**New view filter**

Available in: *Ribbon > View*

Use the *New view filter* function to create a new view filter for the selected folder. A view filter shows a section of the overall repository. This view filter is shown as an additional button in the work area bar.

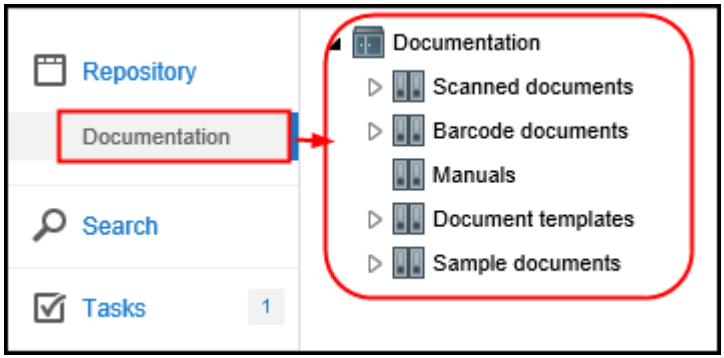



Fig. 50: Added view filter

**Open attachment**

Use the *Open attachment* function to open the current attachment.

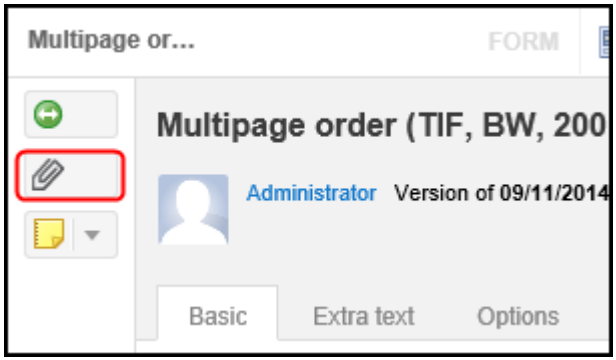



Fig. 51: Clip icon on the split bar

**Information**: A confirmation dialog box from Microsoft Windows may appear. Decide whether you want to save the attachment or open it.

**Open in read-only mode**

Available in: *Ribbon* > *View*

Use this function to open a document in read-only mode. A new browser window opens to display the document.

The document is handled as follows depending on the browser setting:

A) The document appears in a new tab.

B) The document appears in a new browser tab.

C) The dialog box for the file download appears.

D) The document is downloaded directly.

Call up the function as follows:

- Via *Ribbon* > *Document* > *Output* > *Open in read-only mode*.
- Via the context menus of the *Repository*, *Clipboard*, *Search*, and *Tasks* work areas.
- Via the *Document versions* dialog box.
- Via the *File attachments* dialog box.

**Open margin note**

Available in: *Split bar context menu*

If a margin note was added to an entry, an icon with the corresponding color appears on the split bar.

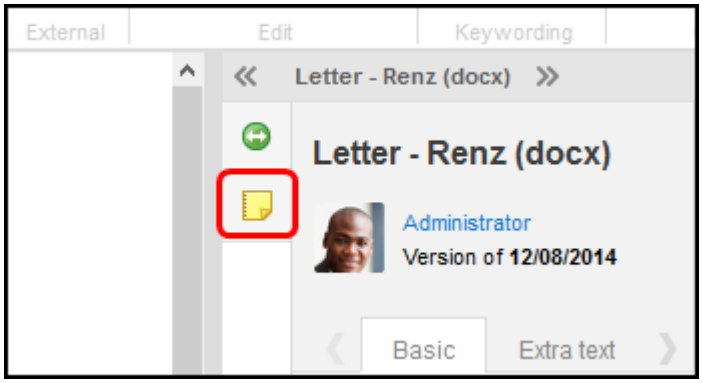



Fig. 52: Margin note icon on the split bar

Open the margin note by clicking the icon. General and personal margin notes can be opened this way.

**Pass forward workflow**

Available in: *Tasks work area* > *Ribbon* > *Tasks*

This function passes forward a workflow to the next user.

1. Switch to the *Tasks* work area.

2. Select the workflow that you would like to pass forward.

3. Click *Pass forward workflow*.

**Alternatively**: Right-click an entry in the repository and select *Pass forward workflow* from the context menu.

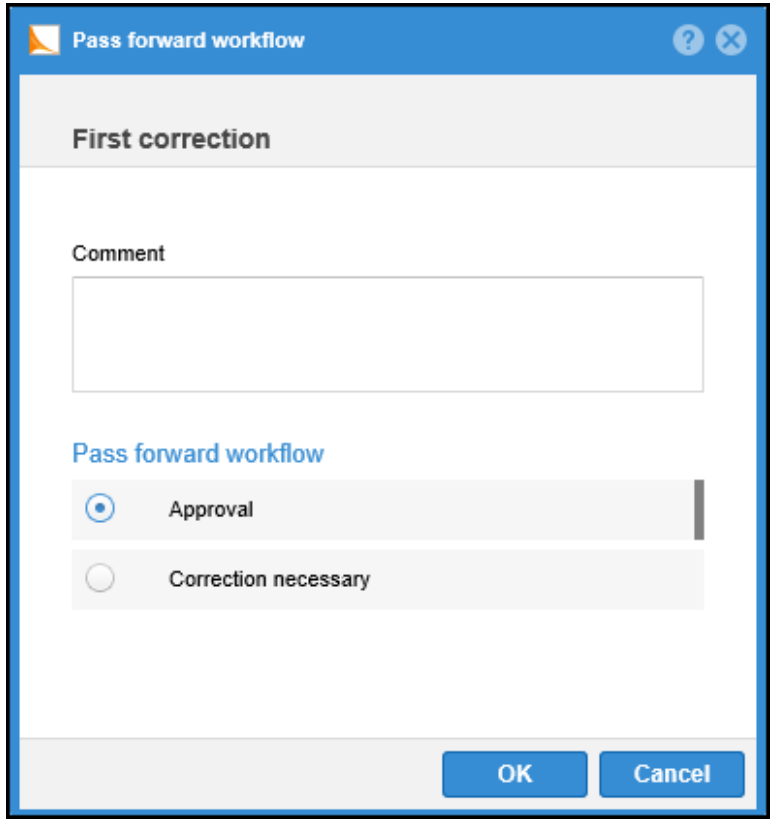



Fig. 53: 'Pass forward workflow' dialog

The *Pass forward workflow* dialog box appears.

**Optionally**: Enter a comment.

4. Select a successor to whom the workflow is to be passed forward.

5. Click *OK* to complete the task.

The workflow runs through the next step.

**Permanent margin note**

Available in: *Ribbon* > *Document*

Use this function to create permanent margin notes. The default color for permanent margin notes is *red*. Once they have been created, they cannot be edited or deleted.

In addition, there are general margin notes (default color green) and personal margin notes (default color red).

**Notes**: You can create margin notes for both folders and documents.

**Personal margin note**

Available in: *Ribbon* > *Document*

Use this function to create personal margin notes. The default color for personal margin notes is *green*. Only the creator of this note can read and edit this type of margin note.

In addition, there are general margin notes (default color green) and permanent margin notes (default color red).

**Information**: You can create margin notes for both folders and documents.

**Preview (Document preview only)**

Available in: *Ribbon* > *View*

When the *Preview (Document preview only)* function is selected, only the contents of the document or folder appear in the viewer pane.

**Preview (Show original document)**

Available in: *Ribbon* > *View*

When the *Preview (Show original document)* function is selected, the original document appears in the viewer pane.

**Refresh**

Available in: *Ribbon* > *Start*

Refreshes the currently selected work area.

The ELO Web Client reloads the repository data from the server. If, for example, you are in the *Search* work area, the ELO Web Client performs the last search again.

**Reminder**

Available in: *Ribbon* > *Tasks*

Use this function to set a reminder for a document.

1. Click an entry in the repository.
2. Click the *Tasks* tab.
3. Click *Reminder*.

**Alternatively**: Right-click an entry in the repository and select *Reminder* from the context menu.

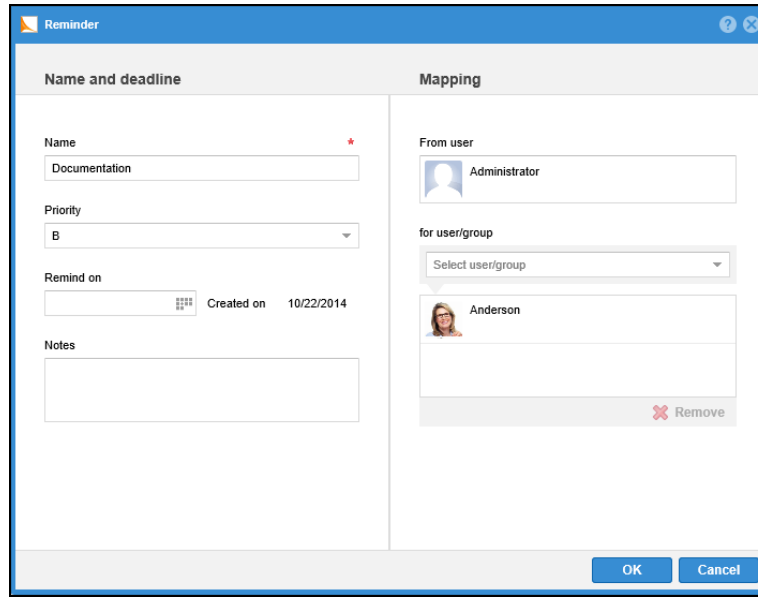



Fig. 54: 'Reminder' dialog box

The *Reminder* dialog box appears.

4. You can make the following settings here:

**Name**: The name of the document is entered by default. Enter another name, if needed.

**Priority**: Select from A, B or C.

**Remind on**: Date on which the document should appear as a task.

**Created on**: Displays the creation date of the reminder.

**Notes**: Enter additional information here.

**From user**: The creator of the reminder is displayed here.

**For user/group**: Enter the recipient(s) of the reminder here.

5. Click *OK* to save the reminder.

The reminder appears in the recipient's *Tasks* work area.

**Remove from Clipboard**

Available in: *Clipboard work area* > *Ribbon* > *Start*

Removes the selected entry from the Clipboard.

The entry remains unaltered in the repository.

**Remove from search results**

Available in: *Search work area* > *Ribbon* > *Search*

Deletes a previously selected entry from the search results list.

**Remove lock**

Available in: *Ribbon* > *Start*

This function discards all changes to a checked out document. The document lock is removed and the document is removed from the *In use* work area.

**Rename view filter**

Available in: *Ribbon* > *View*

Use the *Rename view filter* function to change the name of the selected view filter.

**Save file as**

Available in: *Ribbon* > *Start*

Use this function to store the currently selected document outside of the repository.

**Information**: The function behaves differently depending on the browser used and the settings selected. Save the file as you usually would for your browser.

**Search keywording**

Available in: *Search work area* > *Ribbon* > *Search*

This is used for searching in the keywording information of filed documents.

1. Switch to the *Search* work area.

2. Click the *Search keywording* button.

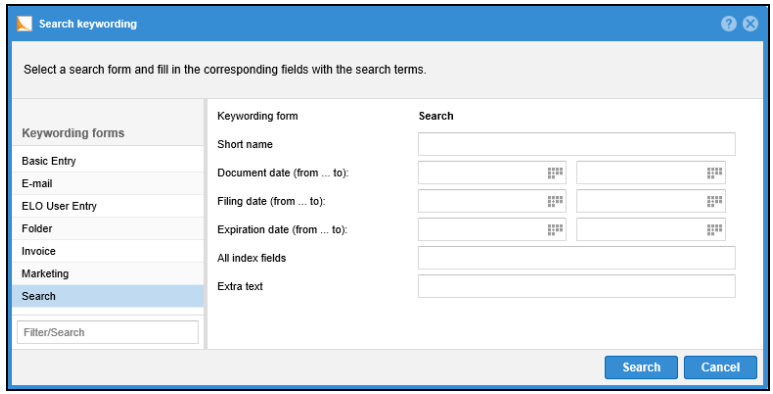



Fig. 55: 'Search keywording' dialog box

The *Search keywording* dialog box appears.

3. Select a search form in the *Keywording forms* column.

4. Enter one or more search terms. Use the index fields of the search form for this.

**Optionally**: Combine different index fields, if necessary.

5. Click *Search*.

The results are displayed in the *Search* work area.

**Search options**

Available in: *Search work area* > *Ribbon* > *Search*

Use the *Search options* button to define the following options:

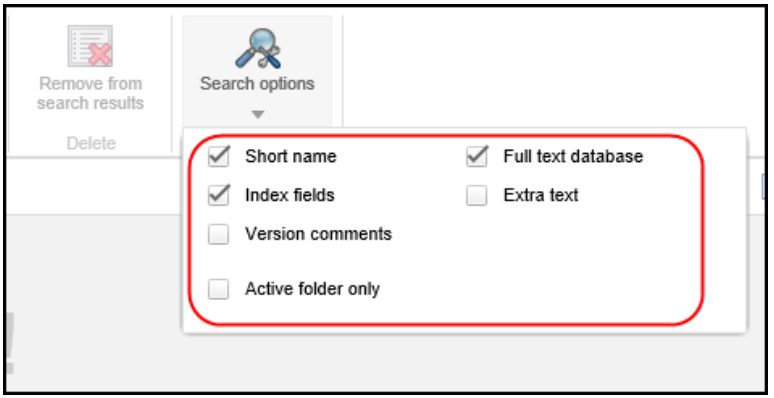



Fig. 56: Define search options

- Short name
- Full text database
- Index fields
- Extra text
- Version comments
- Active folder only

**Information**: The *Active folder only* option is only available if a folder has been selected in the search result. When this option is checked, the searched area is limited to the currently selected folder.

**Show form**

Available in: *Ribbon* > *View*

When the *Show form* function is selected, a form preview appears instead of the keywording preview.

**Start workflow**

Available in: *Ribbon* > *Tasks*

Use the *Start workflow* function to start a new standard workflow.

**Information**: You cannot create any workflow templates with the ELO Web Client. Workflow templates must be created via the ELO Java Client or ELO Windows Client.

1. Click an entry in the repository.

2. Click the *Tasks* tab.

3. Click *Start workflow*.

**Alternatively**: Right-click an entry in the repository and select *Start workflow* from the context menu.

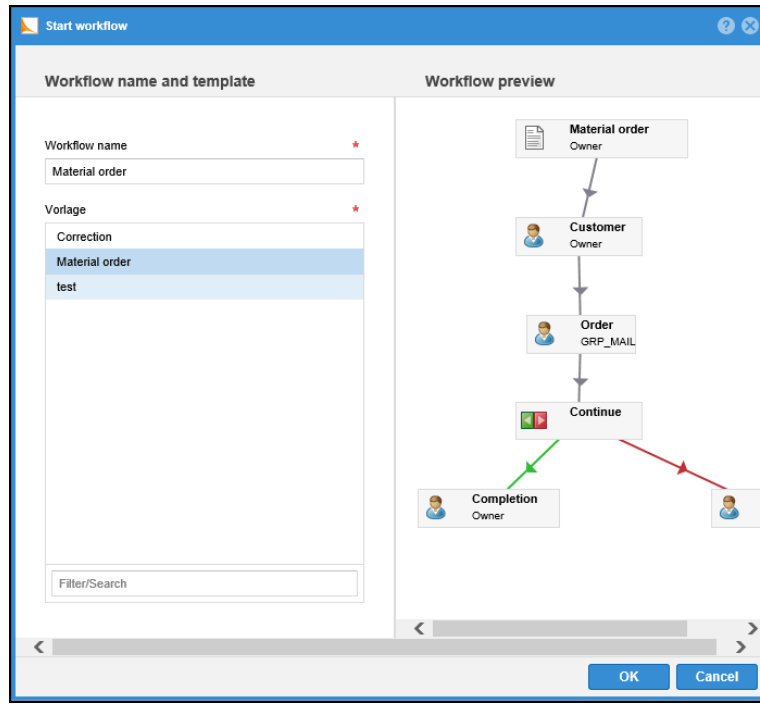



Fig. 57: 'Start workflow' dialog

The *Start workflow* dialog box appears.

4. Select a workflow template.

The workflow diagram appears.

**Optionally**: Change the workflow name via the *Workflow name* field.

5. Click *OK*.

The workflow starts.

## Substitution tasks

Available in: *Ribbon* > *Tasks*

When the *Substitution tasks* option is selected, tasks appear in the tasks list that you were assigned as the substitute for another user.

**Table view**

Available in: *Ribbon* > *View*

Use the *Table* function to set up the viewer pane in such a way that the contents of a folder is displayed as a table. This is called the *table view*.

**Upload and check in**

Available in: *Ribbon* > *Start*

Opens the *Upload and check in* dialog box. You can use the dialog box to upload a new version of a checked out document and remove the editing lock.

**Information**: You must first save the edited document locally. Load this locally saved version as a new version to the repository via the *Upload and check in* function.

**Vertical**

Available in: *Ribbon* > *View*

When the *Vertical* function is selected, the keywording preview or form preview appears to the left of the viewer pane.

**Information**: This function appears by default on the ribbon. This function corresponds to the *Show keywording and document preview side-by-side* function on the preview bar. If you want the buttons to appear on the preview bar, you need to go to *Configuration* > *Display* > *Appearance* and deselect the *Show icons for the preview area on the ribbon* option.

**Web Client help**

Available in: *User account* > *ELO menu*

Use the *Web Client help* function to call up the help page for the ELO Web Client help.

# Keywording

Keywording means assigning keywords to a document. The keywording information therefore is metadata for a document. The quality of a repository is strongly related to the quality of the keywording. Keywording forms allow you to organize documents in a standardized way and file them quickly to the repository. In addition, keywording information makes searching easier.

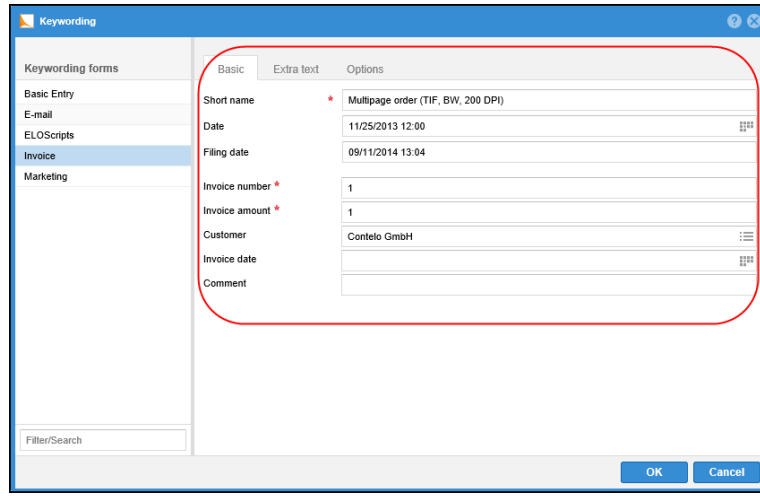



Fig. 58: Keywording form in the 'Edit keywording form' dialog box

You keyword a document via a keywording form. A keywording form contains templates that are specifically created for this document type. Therefore, all documents of a type receive the same permissions settings and are filed using a fixed pattern in the repository.

You usually keyword a document when you file it to the ELO repository. In addition, the keywording of documents that have already been filed can be edited at a later point in time.

**Information**: ELO can extract keywording information from barcodes when the ELO Barcode module is installed. You can find more information on the ELO Barcode module and setting it up via the ELO Administration Console in the *ELO Barcode* user manual.

# Index fields

Enter the keywording information for a document via index fields.

It depends on the index fields which information you need to enter and what you need to consider. There are different types of index fields that in turn can be configured differently depending on the keywording form.

**Example: Text field**

You can enter letters, digits and special characters into a text field. Text fields, however, can also be restricted. An example of the restriction could be through the input.

**Example: Date field**

Date fields exclusively accept date entries and offer a calendar function for the entry.

**Information**: Links can be stored to the index fields. The links can be opened in a browser window. A web link must start with *http*, *ftp* or *https*. Use a space to separate the link and display text. Example: `http://www.wikipedia.org Wikipedia`. If no display text is entered, the link itself is displayed.

## Mandatory fields

Fig. 59: Mandatory field

Index fields can be configured in such a way that you have to enter a certain number of characters to successfully complete the keywording.

You can recognize mandatory fields by a red star after the name of the index field.

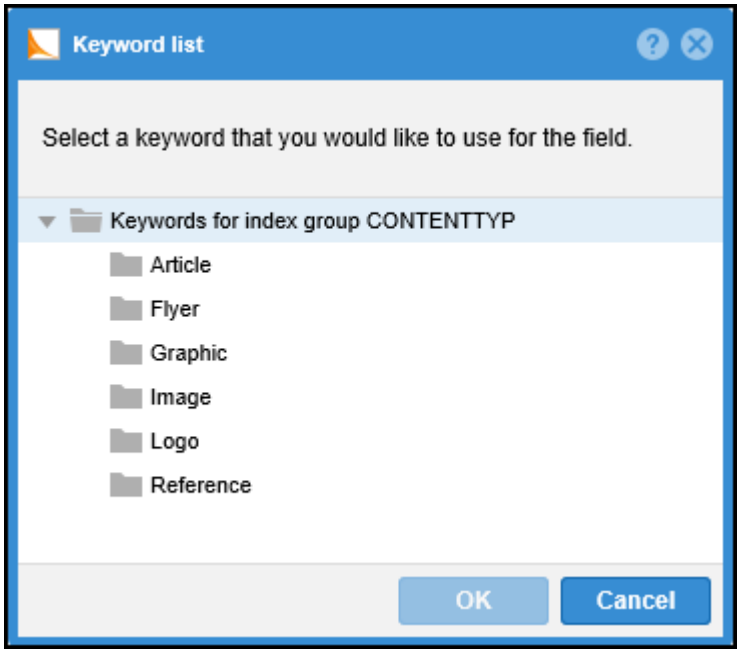



Fig. 60: Keyword list

## Keyword lists

Some index field types can be filled in via keyword lists.

Keyword lists allow you to standardize and enter keywording information faster.

An index field for which a keyword list was added can be configured in such a way that the index field can only be filled in with a keyword list.

You can recognize index fields with keyword lists by the list icon after the respective index field.

**Information**: The ELO Web Client supports dynamic keyword lists.

# Keywording with ELO Click OCR

**Objective**

For keywording, the built-in text recognition can be used as a tool. You can use text from the document for the keywording form via ELO Click OCR. The following example explains how to proceed.

**Requirements**

You need a document for which not all keywording information has been entered yet. When you want to change the keywording, delete individual pieces of keywording information via the *Edit keywording* dialog box.

Fig. 61: Keywording display next to or above the viewer pane

The preview must be set up in such a way that both the keywording preview and the document preview are displayed.

**Step by step**

1. Click the document for which you want to edit the keywording.

The document appears in the viewer pane.

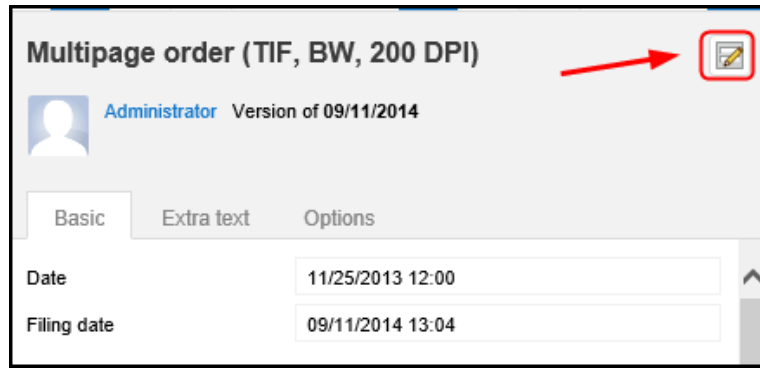



Fig. 62: Editing the keywording via the keywording preview

2. Click the small *Edit keywording* button in the top right corner of the keywording preview.

The keywording preview is now in edit mode.

3. Click the index field that you want to transfer the keywording information to.

The cursor blinks in the selected field.

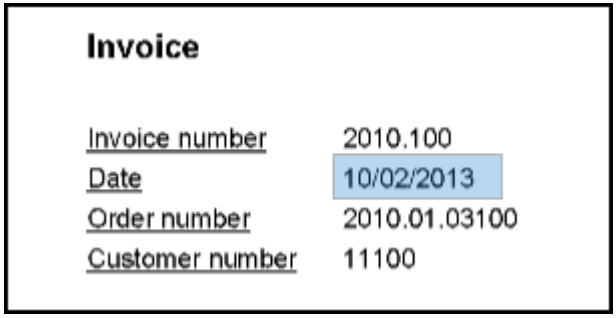



Fig. 63: Defining an OCR area

4. Draw a frame in the viewer pane while holding the CTRL key and left mouse button around the information in the document that you want to use for the keywording.

**Information**: If you want to add multiple terms after another, select each individual term while holding CTRL + SHIFT + LEFT MOUSE BUTTON. Release the mouse button after each term. Repeat the process until you have transferred all desired terms.

5. Release the keys.

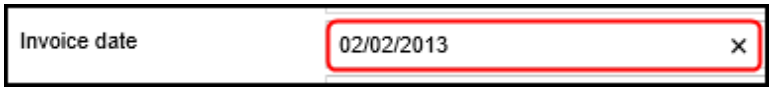



Fig. 64: Transferred text information in the selected index field

The ELO Click OCR reads the text contents of the selected area. The recognized text information is transferred to the selected index field.

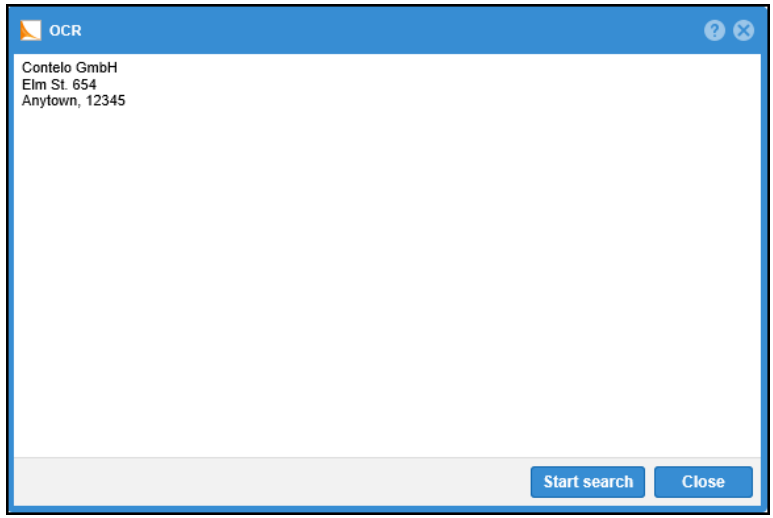



Fig. 65: 'OCR' dialog box

**Information**: When you have not selected a field, the read text appears in the *OCR* dialog box. The desired text can be selected here and copied to the Clipboard.

Fig. 66: Finish editing

6. Click *Save* to leave editing mode and to accept the changes.

**Result**

The *Keywording changed* message appears. The new keywording information is saved.

# Edit keywording

**Objective**

The keywording information of an entry in the repository can be edited and added to at a later point in time. This is required when not all information exists when filing a document, for example.

**Requirements**

You need a document that was already keyworded and filed to the ELO repository.

**Step by step**

1. Click the document.

2. Click *Ribbon > Start > Edit keywording*

**Alternative 1**: Right-click an entry in the repository and select *Edit keywording* from the context menu.

**Alternative 2**: Hit the F4 key.

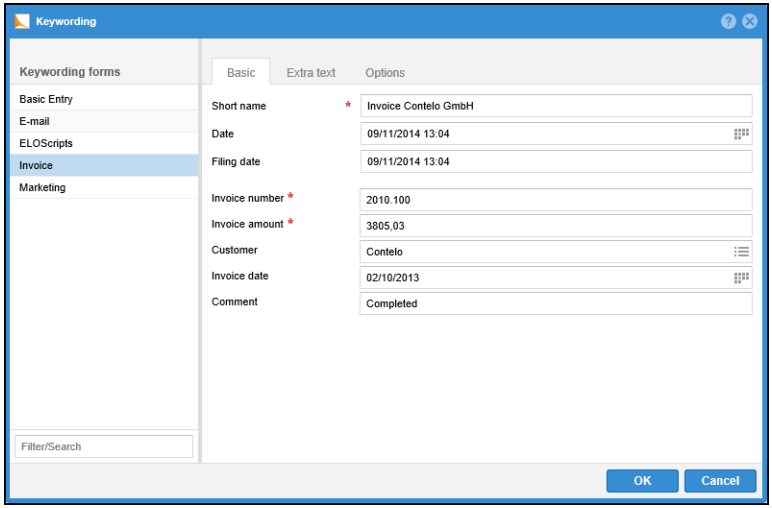



Fig. 67: 'Edit keywording' dialog box

The *Edit keywording* dialog box appears.

3. Edit the keywording information.

**Information**: Links can be stored to the index fields. The links can be opened in a browser window. A web link must start with *http*, *ftp* or *https*. Use a space to separate the link and display text. Example: `http://www.wikipedia.org Wikipedia`. If no display text is entered, the link itself is displayed.

4. Then click *Save*.

**Result**

The changes will be saved and displayed in the document preview.

# ELO Collaboration

ELO offers you a number of features that support you with collaboration within your company.

This chapter contains information on the following topics:

- Feed
- My ELO

# Feed

The feed is used to share information on an entry in the repository (document or folder) and record changes to the post.

The following message types appear in the feed:

- Posts (written by a user)
- Comment (on a post)
- Events (such as when a new document version is filed or changes to the working version)

## Write post

Fig. 68: 'Post a reply' input field

Use the *Post a reply* input field to comment on the respective entry in the repository in a feed. You send the comment by clicking *Create*.

## Mention

Fig. 69: 'Mention' button

Use the *Mention* button (@ icon) to address a feed post directly to another ELO user or an ELO group. The mentioned users then see the corresponding feed post in the *My ELO* work area.

Fig. 70: 'Reference entry' button

**Reference**

Use the *Reference entry* button (document icon with arrow) to link a feed post with an entry in the repository. The reference jumps directly to the respective entry.

**Hashtag**

Fig. 71: 'Hashtag' button

Use the *Hashtag* button to add hashtags to a post. You can subscribe to hashtags. You can also filter the *My ELO* work area via hashtags.

**Subscribing to a hashtag**

1. The particular hashtag to subscribe to it.

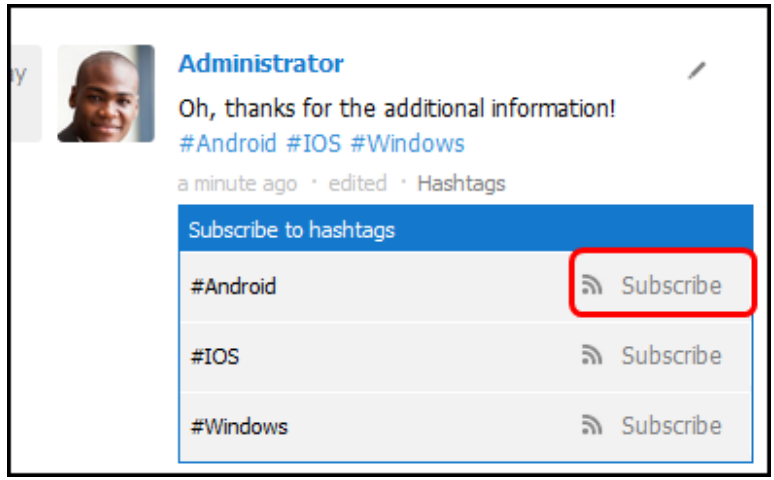



Fig. 72: 'Subscribe to hashtags' drop-down menu; 'Subscribe' button

A drop-down menu appears.

2. Click the *Subscribe* button behind the respective hashtag.

The hashtag is subscribed. All feed posts appear in the *My ELO* work area that were marked with the corresponding hashtag.

## Visibility

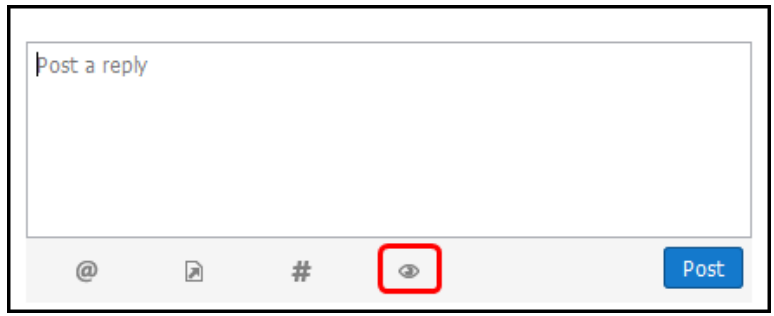



Fig. 73: 'Visibility' button

Use the *Visibility* (eye icon) button to restrict who can read the entry.

## Search feed

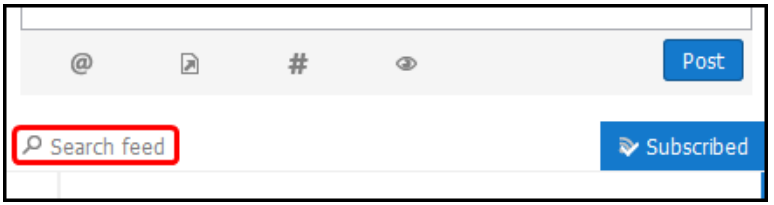



Fig. 74: 'Search feed' button

Use the *Search feed* button (magnifying glass icon) to search within the currently selected feed. When the searched term is found, the feed is reduced to the corresponding posts. The locations where the terms are found will be highlighted. Start the search by clicking *Search*. Click *Reset search* to exit the results list and return to the full feed.

## Subscribe to feed

Fig. 75: 'Subscribe' button

Use the *Subscribe* button (send icon) to subscribe to the currently open feed. All subscribed feeds are collected in the *My ELO* work area. As soon as a comment is added to a subscribed feed, the post also appears in the *My ELO* work area.

## Automatic feed subscription

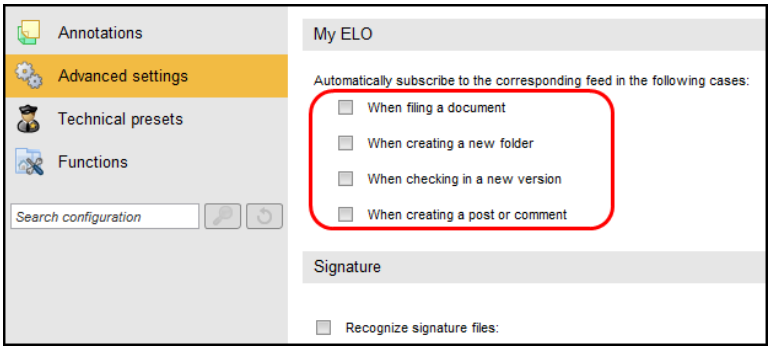



Fig. 76: Options for automatic subscriptions

ELO offers you the option to subscribe to feeds automatically. This applies to specific events triggered by the user:

- Filing a document
- Creating a folder
- Creating a new document version
- Creating a feed post or comment

**Information**: You can find options for activating automatic subscription in the **Java Client** via *ELO menu* > *Configuration* > *Advances settings* > *My ELO*.

## Comment

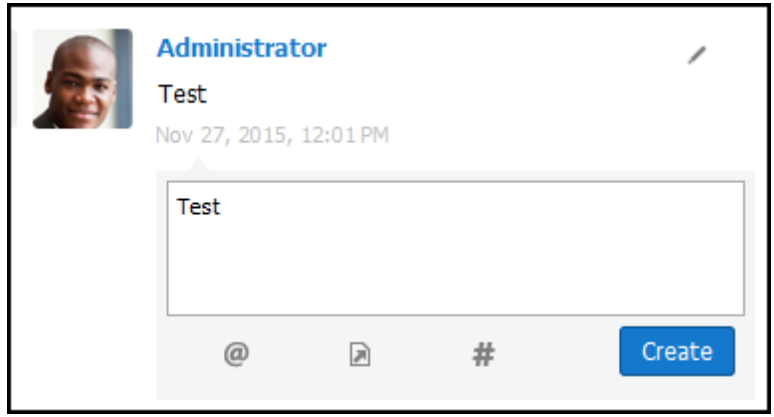



Fig. 77: Comment in the feed

Comments can be written for every post. Creating a comment corresponds largely to the way you create a post. However, the visibility settings of a comment are tied to the visibility settings of the post commented on. Therefore, you cannot change the visibility settings for comments.

## Editing a post

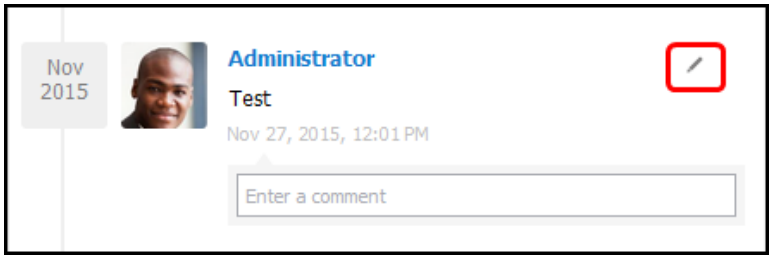



Fig. 78: 'Edit' button

Use the *Edit* button (pencil icon) to edit posts and comments later on.

# My ELO

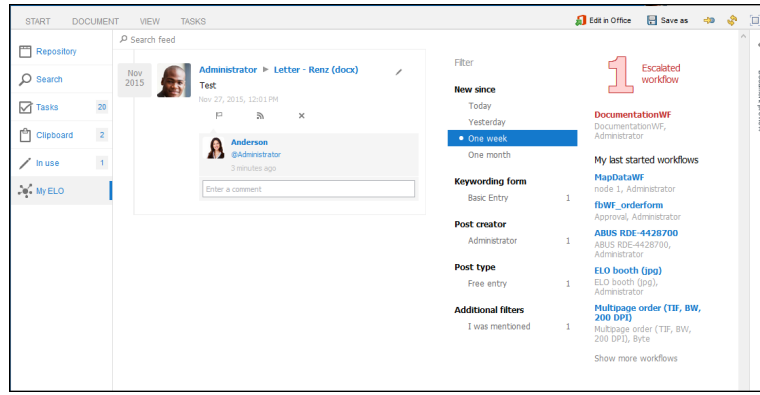



Fig. 79: The 'My ELO' work area

Feed posts from different entries are collected in the *My ELO* work area. This applies, for example, for feeds that a particular user has subscribed to or in which the particular user is mentioned by another user. In addition, escalated workflows and recently started workflows that concern the respective user are displayed.

**Information**: Most of the functions of the *My ELO* work area are feed functions. You can find additional information about this function in the *Feed* section.

## Show workflows

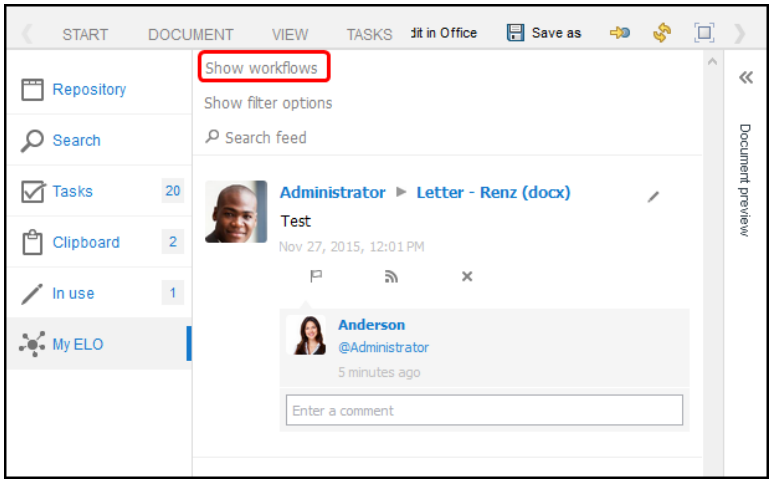



Fig. 80: 'Show workflows' button

If the preview pane in *My ELO* is not large enough to show workflow information, the *Show workflows* button will appear.

Clicking *Show* workflows displays the workflow information above the subscribed feed.

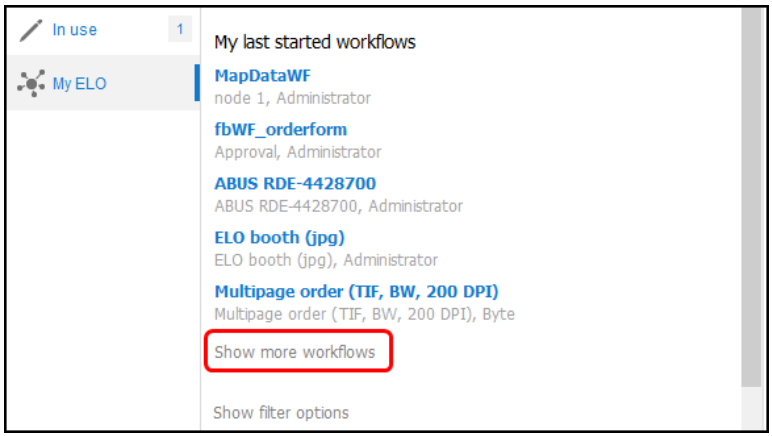



Fig. 81: 'Show more workflows' button

Click *Show more workflows* if you would like to display more workflows.

Click *Hide workflows* to hide the workflow information.

Click *Show fewer workflows* to display less workflow information.

## Escalated workflows

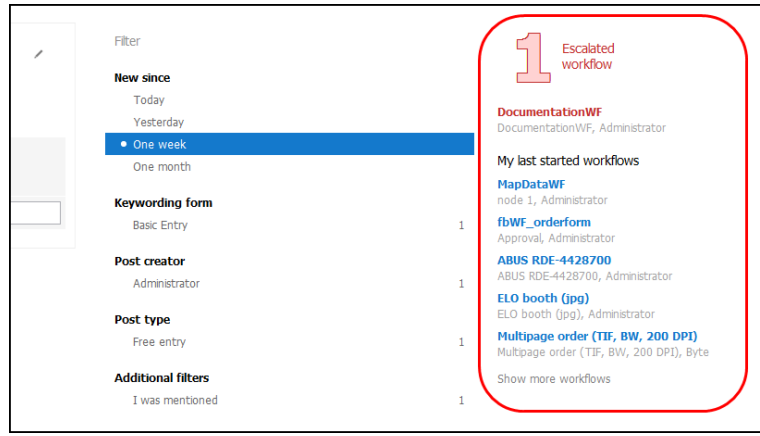



Fig. 82: 'Escalated workflows' area

You see in the *Escalated workflows* area in how many escalated workflows you are a part of and which ones.

Click a workflow name to jump to the respective workflow in the *Tasks* work area.

## Recently started workflows

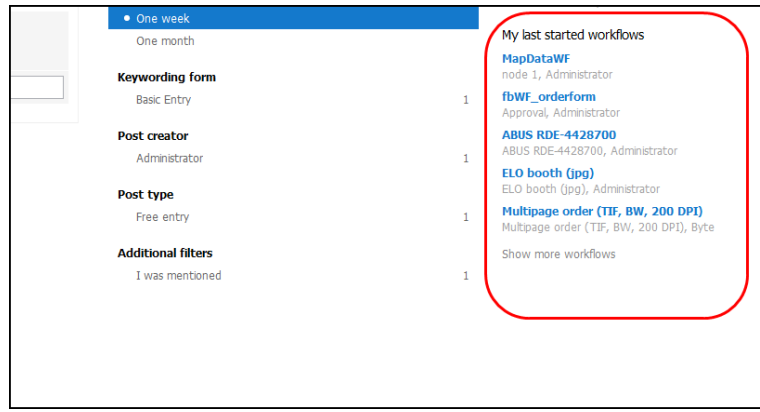



Fig. 83: 'My last started workflows' area

The *My last started workflows* shows you which workflows you started last.

## Show filter options

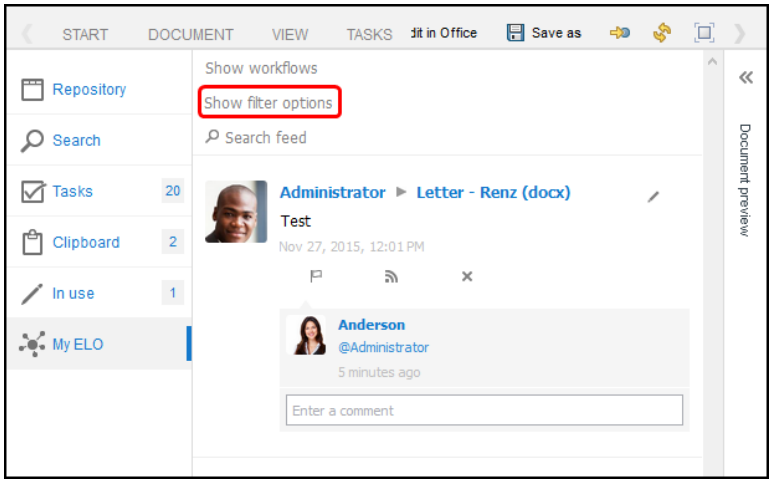



Fig. 84: 'Show filter options' button

If the preview pane in *My ELO* is not large enough to show the filter, the *Filter options* button will appear.

Click *Show filter options* to show the filters above the subscribed feeds.

Click *Hide filter options* to hide the filters.

## Filter categories

The following filter categories are available:

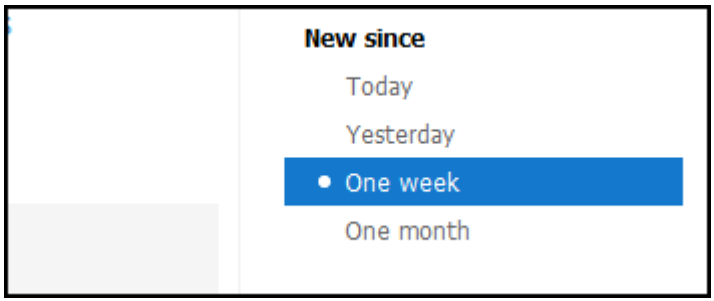



Fig. 85: 'New since' filter category

**New since**: The *New since* filter option lets you filter the *My ELO* work area by time periods.

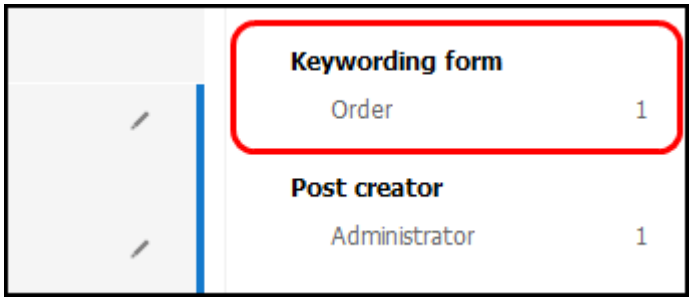


Fig. 86: 'Keywording form' filter category

**Keywording form**: The *Keywording form* filter option lets you filter the *My ELO* work area by the keywording forms used for entries.

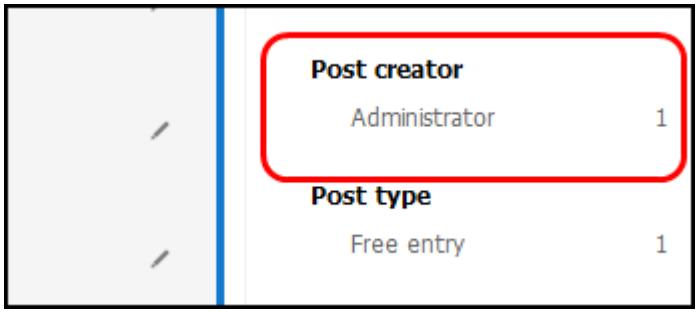


Fig. 87: 'Post creator' filter category

**Post creator**: Use the filters in the *Post creator* category to filter the *My ELO* based on users who have created posts in the subscribed feeds.

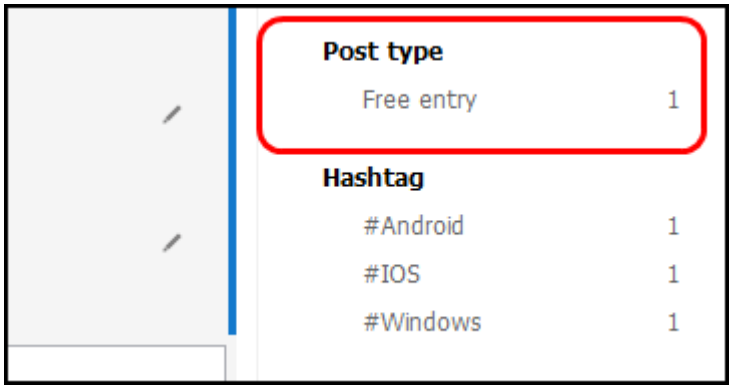



Fig. 88: 'Post type' filter category

**Post type**: The *Post type* filter option lets you filter the *My ELO* work based on the type of feed entries. There are two basic types for this:

- Automatically created posts (such as *Working version changed*)
- Posts created by users (*Free post*)

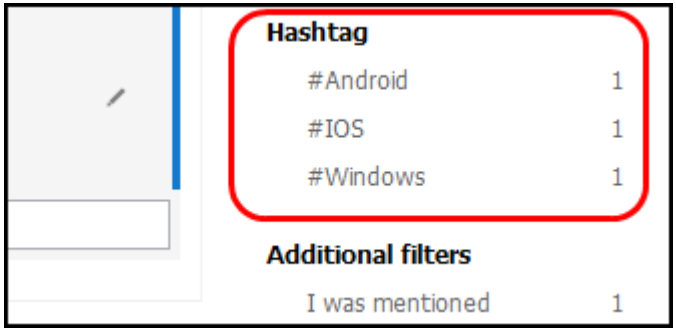



Fig. 89: 'Hashtag' filter category

**Hashtag**: Use the filters in the *Hashtag* category to filter the *My ELO* work area based on hashtags.

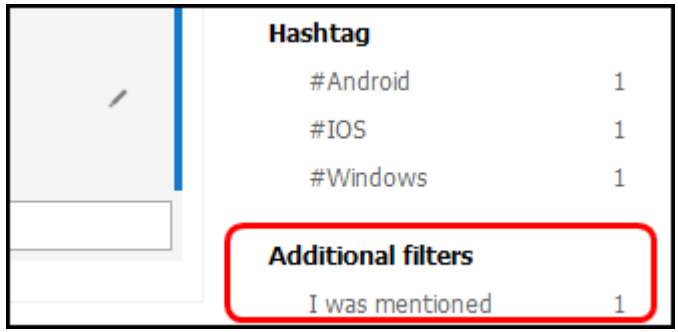



Fig. 90: 'Additional filters' filter category

**Additional filters**: Use the filters in the *Additional filters* category to filter the *My ELO* work area based on settings relating to the current user.

## Applying filters

Click a particular filter in the list to apply it.

## Reset filter

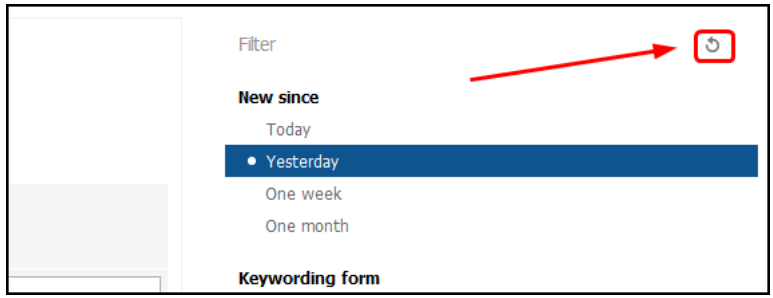



Fig. 91: 'Reset filter' button

Click *Reset filters* (arrow icon) to reset all filters.

## Mark as important

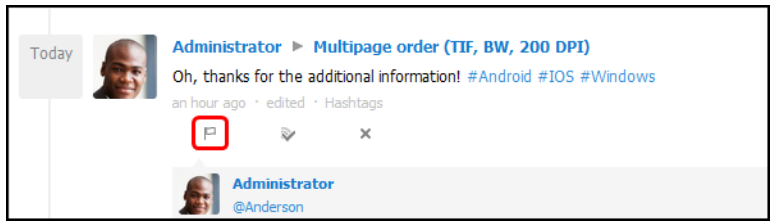



Fig. 92: 'Mark as important' button

Use the *Mark as important* button (flag icon) to pin an entry to the *My ELO* work area. The post remains in the *My ELO* work area permanently, even if it is older than one month. You recognize post marked as important by the red flag icon.

## Delete selection

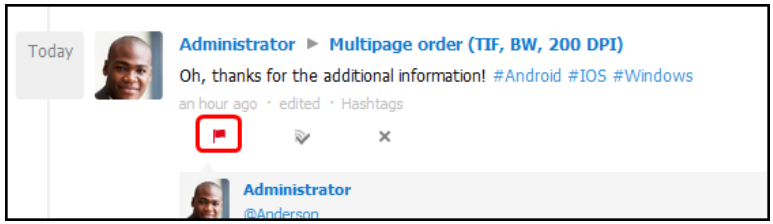



Fig. 93: 'Delete selection' button

Use the *Delete selection* button (red flag icon) to undo the selection of a post. Once the post is older than one month, it is no longer displayed in the *My ELO* work area.

## Hide post

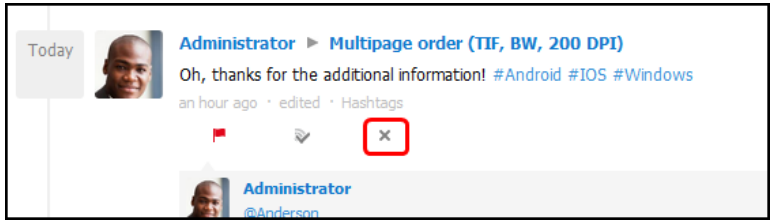



Fig. 94: 'Remove from My ELO' button

Use the *Remove from My ELO* button to hide a post in the *My ELO* work area.

**Information**: You cannot remove a post from the feed via the *Remove from My ELO* function.

Fig. 95: 'Undo' button

After hiding a post, you have the option to show it again via the *Undo* button. The button disappears again after a short time.

**Information**: The *Undo* button disappears after a few moments.

# Profile image

Every user can write an entry or post a comment in the feed. User images can be added to the user profiles.

**Information**: You need to have the permission for the user folder to make these settings.

There are two ways to change the profile image of an ELO user:

- By the administrator in the Administration folder
- By the user in the user profile

**As the administrator**

In the following, the path for administrators is described.

**Storage location**

The path of the filing location for profile images is as follows:

*Administration¶Users¶<folder with corresponding number range>¶<user name>¶data¶elo.profile*

**Information**: The profile image must have the short name *user-image*. Use PNG, JPG or GIF image files with a minimum of 280 x 280 pixels.

**Step by step**

1. Open the user folder for the respective user (see above).

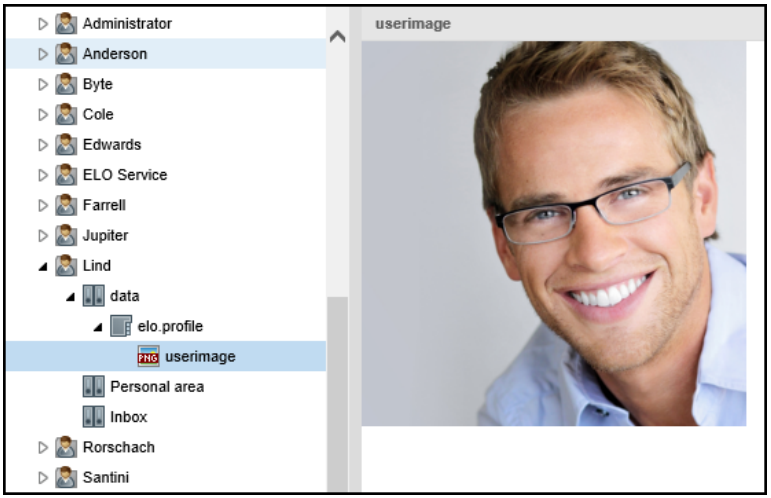



Fig. 96: Profile image in the 'elo.profile' folder

2. Save the profile image to the *elo.profile* folder for the respective user.

3. Enter the name *userimage* in the *Short name* index field.

4. Close the *Keywording* with *OK*.

**Result**

The individualized profile images are displayed in the feed.

**About the user profile**

A user profile is created for every user. This can be accessed via the feed or via the *My ELO* work area. Users can change their own profile images in the respective dialog box. In the following, the path via the feed is described.

**Requirements**

- You must have created a least one feed post.

**Step by step**

1. Select an entry in the repository which you created a feed post for.

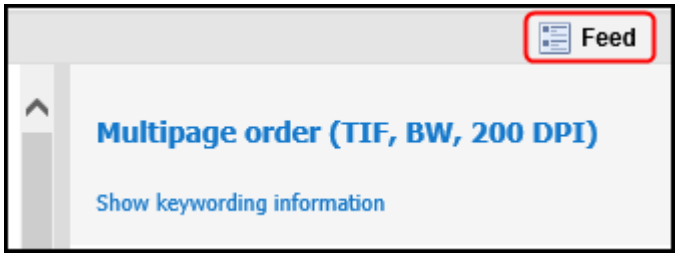



Fig. 97: Preview element 'Feed'

Optionally: If the feed is hidden, you can display it by clicking the **Feed** button in the preview bar.

2. Navigate to a feed post which you have created.

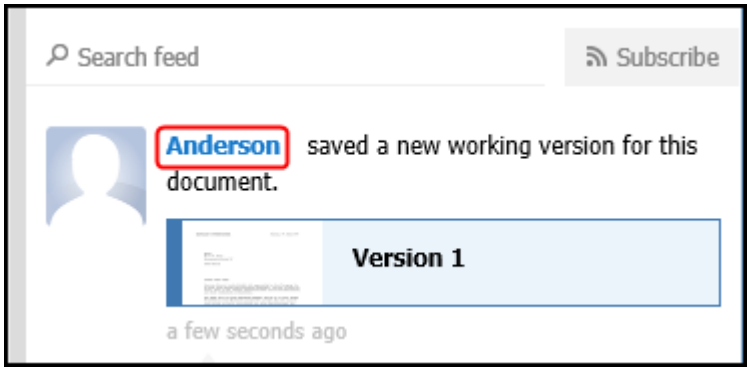



Fig. 98: Feed post; User name

3. Click your user name.

**Alternatively**: Click your profile image.

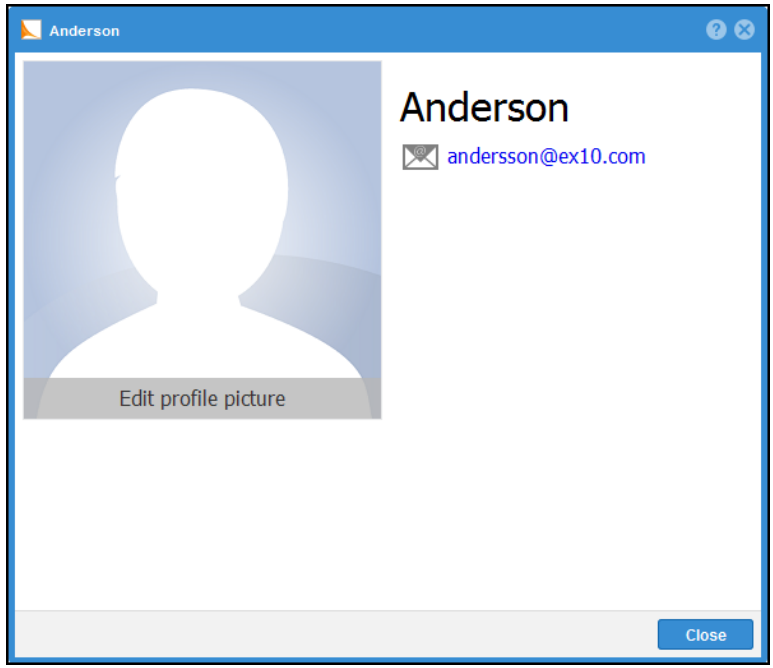



Fig. 99: User profile without user image

The dialog box with your user profile appears.

4. Click *Edit profile image*.

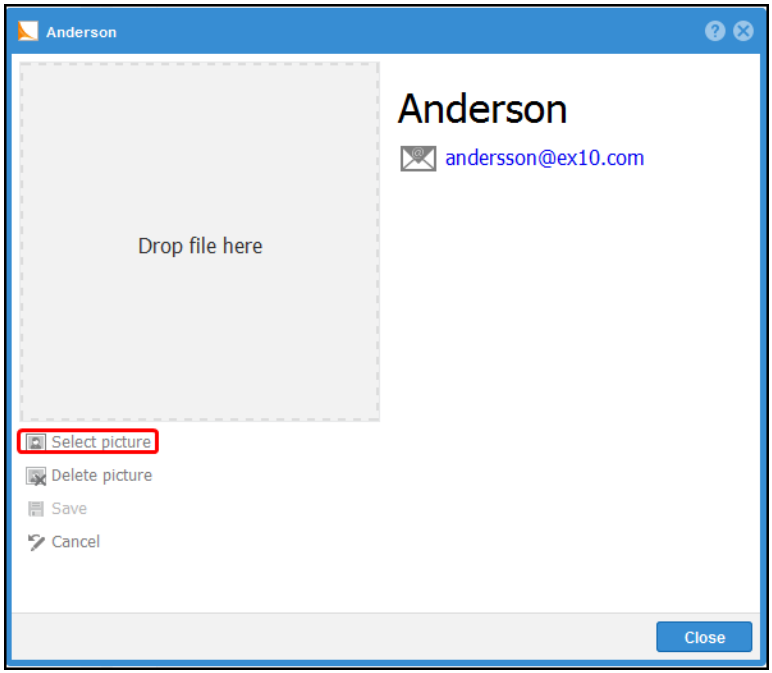


Fig. 100: Edit mode; 'Select photo' button

The dialog box switches to edit mode.

5. Click *Select photo*.

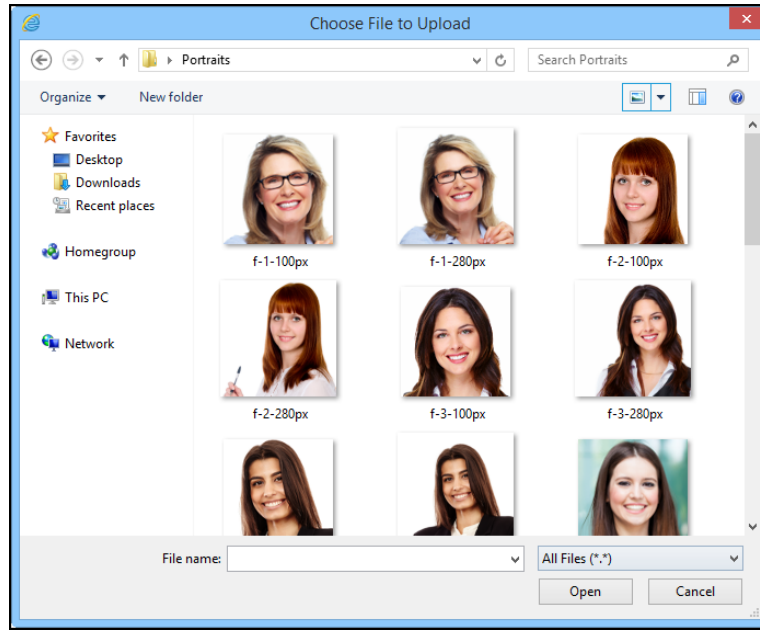



Fig. 101: Dialog box for selecting a file

A Windows dialog box for selecting a file from the system appears.

**Information**: Use PNG, JPG or GIF image files with a minimum of 280 x 280 pixels.

6. Select the desired image file.
7. Click *Open*.

The file will be uploaded.

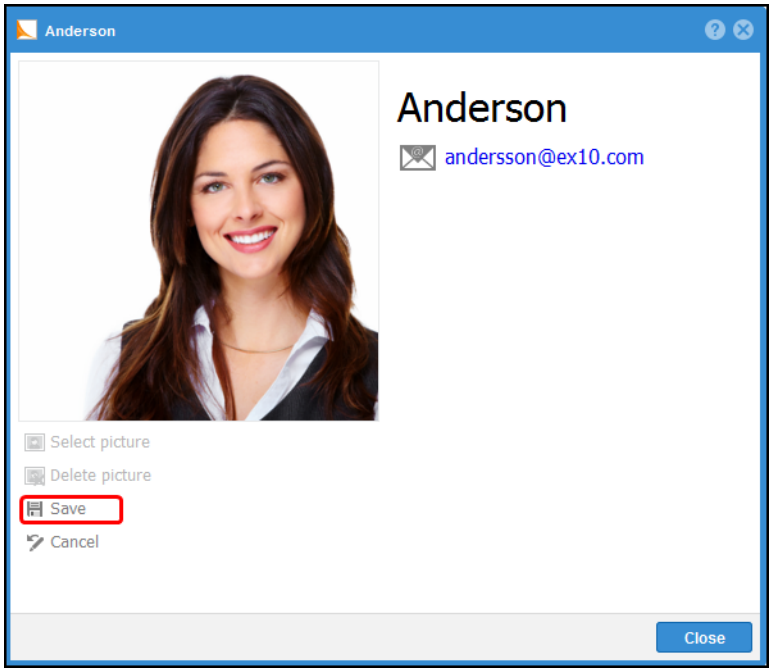


Fig. 102: 'Save' button

8. Click *Save*.

Edit mode now closes. The new profile image appears in the dialog box.

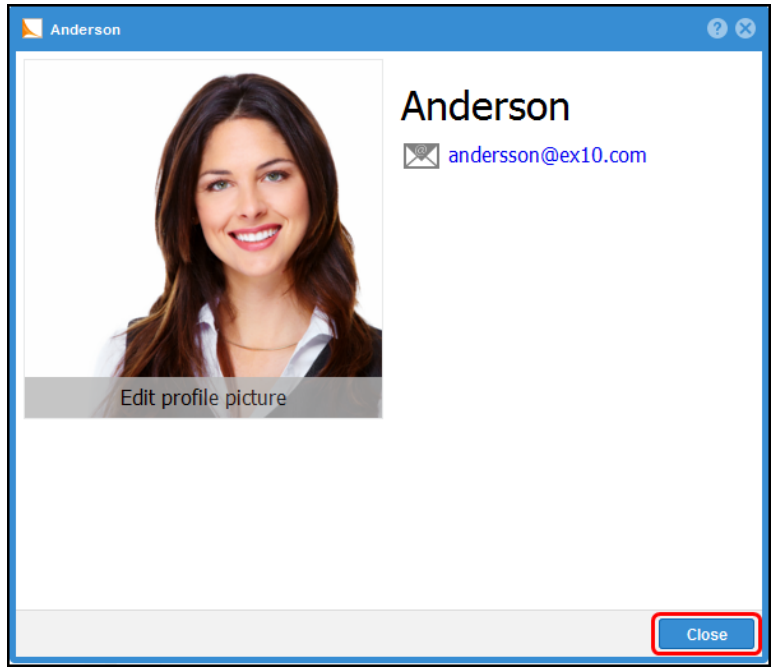


Fig. 103: 'Close' button

9. Click *Close*.

The dialog box now closes. The new profile image is saved.

# Text and image display

ELO Web Client offers additional control elements in the viewer pane for displaying images (formats: JPG, TIFF, PNG, ...) and text files (formats: TXT, HTML, JS, ...) or the full text contents of documents.

**Text display**

The text display is used to display the full text information of documents which have been included in the full text database. In addition, you can specify that this view is used for documents with particular file extensions.

**Please note**: Unexpected display errors may occur for binary files.

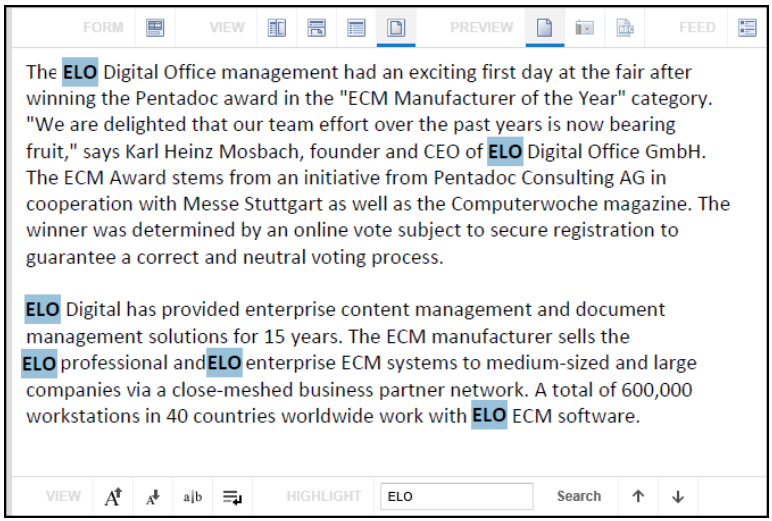



Fig. 104: Text display

Click the *Display full text database content* button. The text display appears.

The text display has a menu bar with the following functions:

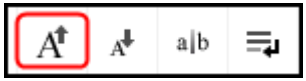



Fig. 105: 'Increase font size' button

**Increase font size**: Enlarges the font size of the displayed text.

Fig. 106: 'Decrease font size' button

**Decrease font size**: Reduces the font size of the displayed text.

Fig. 107: 'Fixed font width' button

**Fixed font width**: Switches the display to a non-proportional font so that all characters are displayed with the same spacing. This increases the readability especially for code.

Fig. 108: Activate wordwrap in the text display

**Wordwrap**: The rows will be wrapped automatically.

Fig. 109: Search area in the text display

**Highlight/Search**: A word can be entered, searched, and highlighted in color.

Fig. 110: 'Up' button

**Up**: Jumps to the last highlighted entry in the text.

Fig. 111: 'Down' button

**Down**: Jumps to the next highlighted entry in the text.

**Image display**

The image view is used to preview image documents. You can also specify that this display mode is used for documents with specific file extensions.

Annotations attached to a document will also be displayed in the image view, but cannot be edited.

Fig. 112: Image display

The image display has a menu bar with the following functions:

Fig. 113: 'Zoom out' button

**Zoom out**: Reduces the displayed image.

Fig. 114: 'Zoom in' button

**Zoom in**: Enlarges the displayed image.

Fig. 115: 'Set zoom level to 100%' button

**Set zoom level to 100%**: The image is displayed in the original size.

Fig. 116: 'Fit width' button

**Fit width**: The image size will fit the width of the viewer pane.

Fig. 117: 'Fit width' button

**Adjust height**: The image height is adjusted to the height of the viewer pane so that the entire page of the document is displayed.

Fig. 118: 'Rotate left' button

**Rotate left**: The image is rotated 90 degrees to the left.

Fig. 119: 'Rotate right' button

**Rotate right**: The image is rotated 90 degrees to the right.

Fig. 120: Display of the current page number and overall page number

**Pages**: Shows the current page number and the overall page number.

Fig. 121: 'Next page' button

**Next page**: The next page of a multipage document will be displayed.

Fig. 122: 'Previous page' button

**Previous page**: The previous page of a multipage document is displayed.

# Administration

This chapter contains information on administrative tasks in the ELO Web Client and is geared towards system administrators.

# Configuration page

You can make a number of settings via the configuration page of the ELO Web Client.

**Configuration sets**

The different settings are separated into groups. These groups are called *Configuration sets*.

The ELO main administrator automatically has the right to manage all configuration sets and has the option of assigning or removing users and option groups to or from configuration sets.

**Information**: Each user only sees the settings that are assigned to him via the configuration sets. Only the administrator sees the sets themselves.

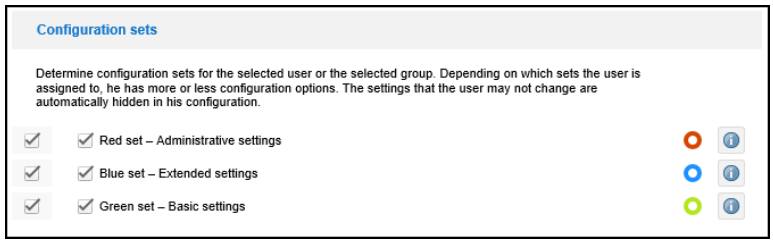



Fig. 123: Configuration sets

The following configuration sets exist:

- **Red set**: Refers to administrative settings that have a far-reaching impact. This set should be reserved for administrators.
- **Blue set**: Refers to the settings that have a more profound effect.
- **Green set**: Refers to settings without a significant impact.

**To whom do these settings apply?**

You must first choose for whom you want to change the settings. The following modes are available:

Fig. 124: Buttons for selecting the target group

**Create my configuration**: All settings only apply to your own account. Click the *Create my configuration* button to choose this mode.

**Create configuration for user/group**: The settings apply for a certain user or user in an option group. To choose this mode, click the *Create configuration for user/group* button and choose a user or an option group.

**Create global configuration**: The settings apply for all users. Click the *Create global configuration* button to choose this mode. The *Configuration for: Everyone (global)* text appears in the menu bar on the left.

## Setting for your own user account

In the following, we will explain the basic principles for changing settings for your own user account.

1. Click *Create my configuration*.

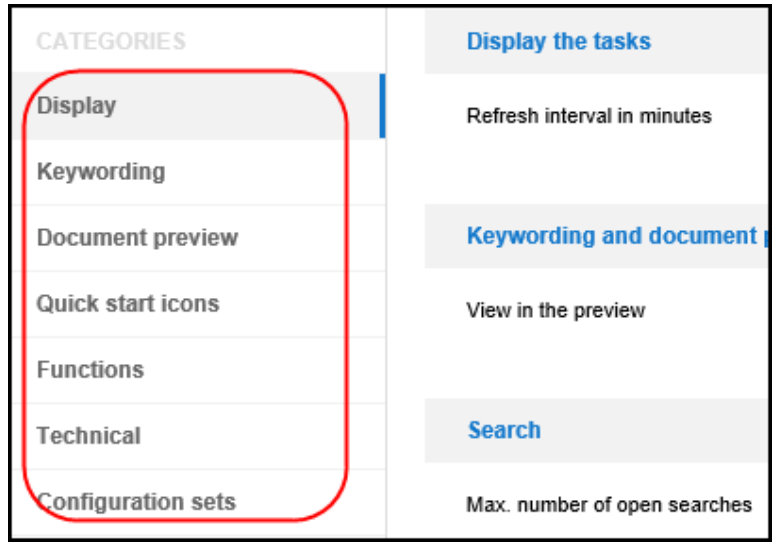



Fig. 125: Categories of the configuration page

2. Choose a category, such as the category Display.

The category appears.

Fig. 126: 'Maximum display' area

3. Click the setting that you want to change.

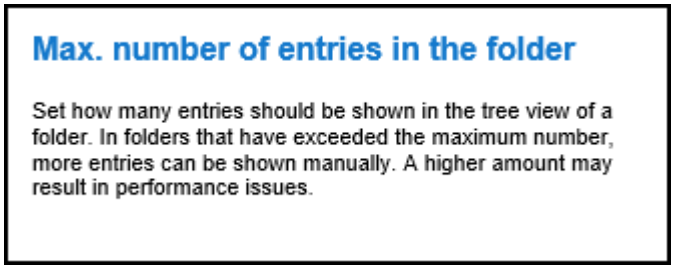



Fig. 127: Overview of the selected setting

On the right side, an overview of the currently selected entry appears. The overview includes the following items:

**<Name of the setting>**: You see here which setting the overview applies to and are shown a short explanation of the selected setting.

4. Make the desired changes.

Each change is applied immediately. You do not have to save.

## Settings for other users

In the following, we will explain the basic principles for changing settings for other users or for option groups. The following steps are therefore only relevant for users (administrators) who have the right to change settings for other users.

1. Choose whether you want to make settings for another user, an option group or for all users.

2. Choose a category, such as the category Display.

The category appears. Settings that are set to the default for the selected user/group appear grayed out.

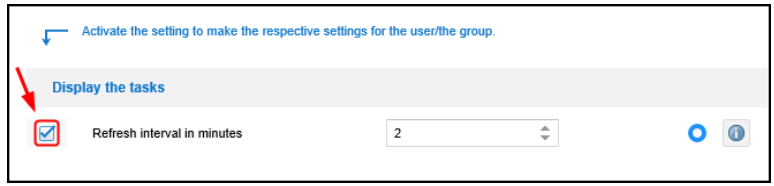



Fig. 128: Check box for activating the editing mode for a setting

3. Click the check box in front of the setting that you want to change.

The setting is now no longer grayed out. It can now be edited.

**Caution**: When you have changed a setting, leave the check box farthest on the left selected. When the check box is cleared, the ELO Web Client resets the settings back to the default value.

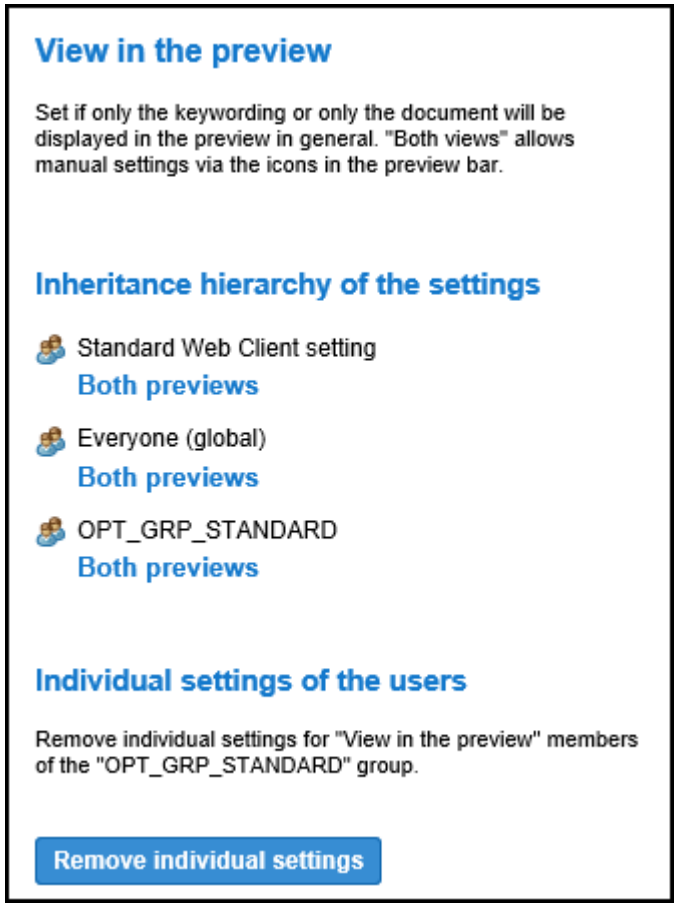



Fig. 129: Overview for the selected setting

On the right side, an overview of the currently selected entry appears. The overview includes the following items:

**<Name of the setting>**: You see here which setting the overview applies to and are shown a short explanation of the selected setting.

**Inheritance hierarchy of the settings:** The ELO Web Client verifies at three levels which settings apply for which user. If there is an individual setting for a user, ELO uses this setting. When there are no individual settings for a user, the ELO Web Client checks whether the user is a member of an option group. If this is the case, the settings of the option group apply. The default values apply should no settings have been assigned.

**Individual settings of the users**: This item only appears when you create a configuration for an option group. Use the *Remove individual settings* button to make sure that all users of an option group have indeed been assigned the same settings.

**Please note**: The *Remove individual settings* process is required when the members of an option group have first had access to certain settings themselves. If the administrator now removes a configuration set from an option group, this option group has fewer settings to choose from. However, changes made up to this point must be overwritten once.

4. Make the desired changes.

Each change is applied immediately. You do not have to save.

## Categories

The settings on the configuration page are divided into categories. When you open a category, you see the settings of the selected category. The settings are grouped by topic within the category.

## 'Display' category

The following topics and settings are contained in the *Display* category:

### Tasks display

Fig. 130: 'Tasks display' area

**Refresh interval in minutes**: Determine after which period the tasks list in the tasks list and the tasks counter in the *Tasks* work area bar are refreshed automatically. Entering a value of `0` automatically deactivates the refresh.

## Keywording and document preview

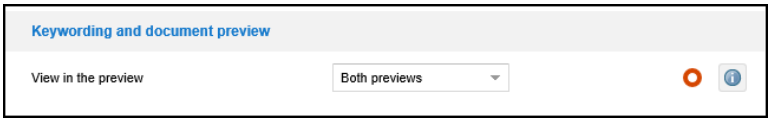



Fig. 131: 'Keywording and document preview' area

**View in the preview**: Choose which preview mode should be used.

## Search

Fig. 132: 'Search' area

**Max. number of open searches**: Determine the maximum amount of search queries that may be open in a session. When the maximum amount has been reached, the oldest search is closed automatically.

**Max number of search results per page**: Determine the maximum amount of entries that will appear in the search results.

**Display results text**: When this setting is active, the full text excerpt appears in the search results list that includes the search term. The search term is highlighted.

**Faceted search**: The faceted search is an alternative method for using filters. ELO automatically suggests possible filters for the search that the user can add.

## Maximum display

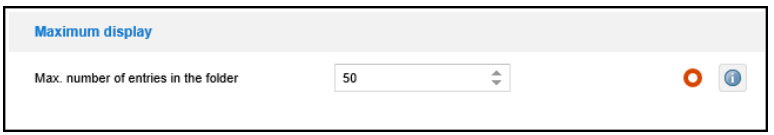



Fig. 133: 'Maximum display' area

**Max number of entries in the folder**: Determine the maximum amount of entries that will appear when you open a folder.

## The ribbon

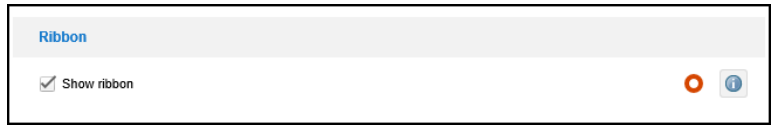



Fig. 134: 'Ribbon' area

**Show ribbon**: Determine whether the ribbon should be shown.

## Appearance

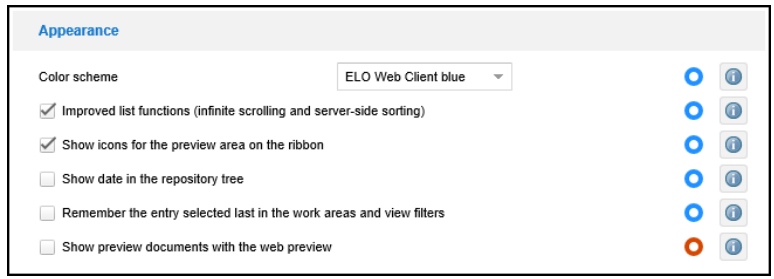



Fig. 135: 'Appearance' area

**Color scheme**: Choose the color scheme of the ELO Web Client.

**Improved list functions**: When you select the *Improve list functions* option, the functions *infinite scrolling* and server-side sorting are available. These additional functions are used for displaying folders in the viewer pane. For further information, refer to *Basics* chapter > *Program interface* section.

*Show icons for the preview area on the ribbon*: If this option is checked, the *Preview*, *Image preview* and *Full text* functions are shown on the *View* ribbon tab. If this option is not checked, the functions appear on the *Preview bar* above the viewer pane.

**Show date in the repository tree**: If you check the *Show date in the repository tree* option, the document date is shown in front of the entries in the repository tree.

**Remember the entry selected last in the work areas and view filters**: If you check this option, the ELO Web Client remembers which entry you most recently selected in the respective work area or view filter. If you switch to another work area or view filter, you can select a different entry. If you go back to the original work area or view filter, the last selected entry will be shown again.

**Information**: The *Tasks* and *My ELO* work areas do not support this option.

**Example**

You select a PDF document in the *Repository* work area. Then you switch to the *Clipboard* work area to view an image document. When you go back to the *Repository* work area, the PDF document is displayed automatically.

**Show preview documents with the web preview**: If you select the *Show preview documents with the web preview* option, preview documents that have been generated are displayed with an integrated web preview. If this option is unchecked, the image preview is used instead. The image quality in the web preview is better than in the image preview; however, annotations cannot be shown here.

**Warning**: An additional plug-in is required for TIFF documents.

**Information**: The preview documents need to be created in advance for most formats, e.g. using the *Create preview document* function in the ELO Java Client. The *Image preview* function (*Ribbon > View*) also needs to be selected in the ELO Web Client.

## 'Keywording' category

The *Keywording* category contains the following topics and settings:

### Keywording forms for various file types

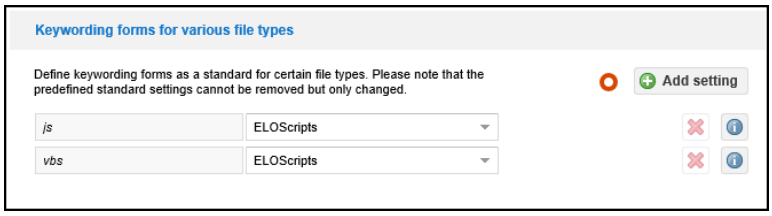



Fig. 136: 'Keywording forms for various file types' area

Define which keywording form is preset for which file type.

**Add setting**: Use the *Add setting* button to add additional entries to the list:

1. Enter the desired extension (without a period) in the first field.

2. Choose a keywording form via the drop-down menu in the second field.

The ELO Web Client saves the additional entry.

**Delete setting**: You can remove settings you added yourself via the X icon.

**Information**: The default settings cannot be deleted.

### Presetting for the keywording

Fig. 137: 'Presetting for the keywording' area

- **Keywording search**: You determine here which keywording form is preset during the keywording search.
- **New folder**: You determine here which keywording form is preset for a new folder here.

### 'Document preview' category

The *Document preview* category includes the following topics and settings:

### Preview configuration for certain file types

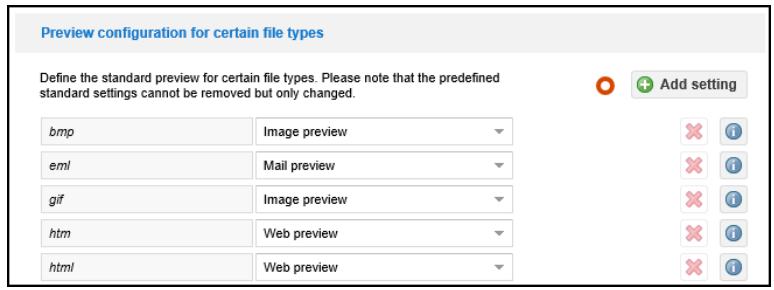



Fig. 138: 'Preview configuration for certain file types' area (a selection of the file types)

Determine which preview mode the ELO Web Client uses for which file type.

Use the drop-down menu in the field after the respective file type to choose a preview mode.

**Information**: The ELO Web Client supports the display of Microsoft Office documents via the Microsoft Office Web Apps. When the Microsoft Office Web Apps have been set up, two additional options appear in the drop-down menu. To set it up, read the *Settings via the ELO Application Server Manager* section.

**Add settings**: Use the *Add settings* button to add additional entries to the list:

1. Enter the desired extension (without a period) in the first field.

2. Choose a preview mode via the drop-down menu in the second field.

The ELO Web Client saves the additional entry.

**Please note**: When you deviate from the default settings, check whether the respective file type is displayed with the selected preview mode.

**Delete setting**: You can remove settings you added yourself via the X icon.

**Information**: The default settings cannot be deleted.

### Maximum size (in MB) for the preview

Fig. 139: 'Maximum size (in MB) for the preview' area

**Maximum size (in MB) for the preview**: Determine up to which size the documents are displayed in the viewer pane.

**Information**: When a document exceeds the set size, a notification and the *Save file as* button appear. You need to download the document to see it.

### 'Quick launch toolbar' category

You can add or remove *Quick launch* icons via the *Quick launch toolbar* category.

## Assign functions to the quick launch toolbar

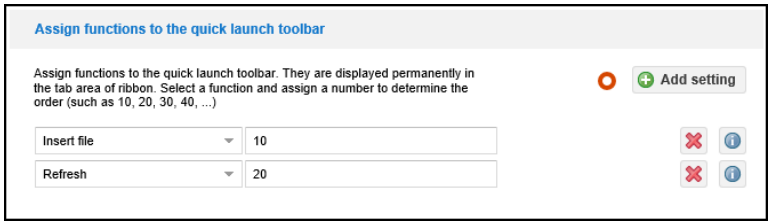



Fig. 140: 'Assign functions to the quick launch toolbar' area.

**Add setting**: Use the *Add setting* function to add the two settings fields for another quick launch icon.

Use the drop-down menu in the first field to select the desired function.

Enter a number value in the second field (such as 10, 20, 4000,...). The value is used to sort the icons when there are multiple icons. The icon with the lowest value is the farthest on the left, etc.

**Delete setting**: You can remove icons you added yourself via the X icon.

## 'Functions' category

The *Functions* category includes the following topics and settings:

### Web Client functions

Fig. 141: 'Web Client functions' area (a selection of functions)

Determine which functions are available.

### Web Client work areas

Fig. 142: 'Web Client work areas' area

Determine which work areas are available.

### 'Technical' category

The following topics and settings are included in the *Technical* category:

### E-mail search

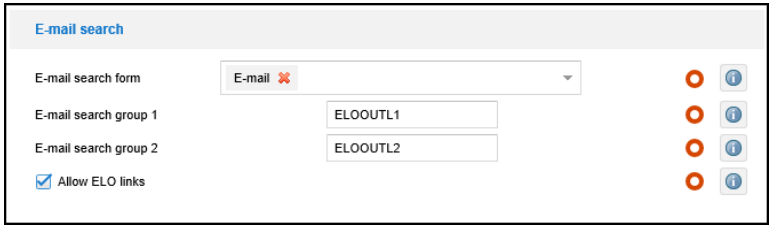



Fig. 143: 'E-mail search' area

**E-mail search form**: Choose one or multiple keywording forms that will be searched when searching for e-mails.

**E-mail search group 1**: Enter a group name (index fields). All index fields that are connected with the selected group are searched. For example: Use the *ELOOUTL1* group for the *From* field.

**E-mail search group 2**: If required, add an additional group name. For example: Use the *ELOOUTL2* group for the *To* field.

- **Allow ELO links**: ELO links are displayed in the search results.

## Technical presets

Fig. 144: 'Technical presets' area

**Information level of the protocol (log level)**: Determine how much information will be written to the protocol.

**Save view data locally**: Determine whether the view data should be saved locally.

## 'Configuration sets' category

Determine which user or which option group is assigned which configuration sets.

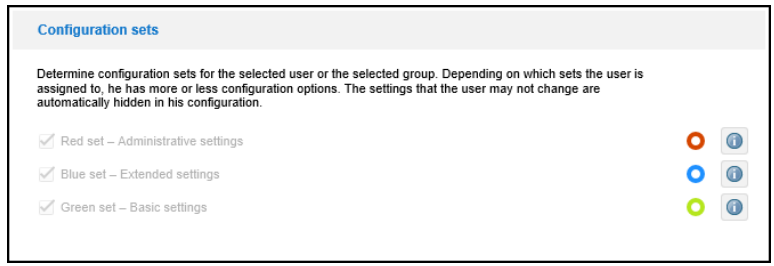



Fig. 145: Configuration sets

**Information**: Administrators cannot withdraw configuration sets from themselves.

## Reset my view data

Use the *Reset my view data* button on the menu bar to reset the view data for the currently selected active account to default values. The view data includes table settings, window sizes and positions.

Fig. 146: 'Reset my view data' button

1. Click the *Reset my view data* button.

The *Reset my view data* dialog box appears.

2. Click *Reset my view data*.

The ELO Web Client is reloaded with the default values for the view data.

# Start pages and entry points

The ELO Web Client has multiple start pages and entry points. Each entry point forwards to the respective start page. Depending on the start page, different functions and areas are available.

**Information**: The preset language is determined based on the language setting in the browser and is used as the default value. However, you can change the language in the logon dialog box or via the start parameters (see below) at any time.

**Start pages**

Choose from the following start pages:

- Main page
- Direct view
- E-mail search

**Main page**

This page offers the full functionality of the ELO Web Client.

The following entry points are also available for the main page:

**Manual logon**

**http://<host>:<port>/web-<repositoryname>/**

For example: *http://ELOSERVER:9090/web-Repository/*

You will be sent to the logon page. You must enter your user name and password.

When the logon is successful, you will be sent to the main page of the program. If the logon fails, a corresponding error message is shown. In this case, please change your entries and click *OK*.

**Information**: For a manual logon, the entered name remains when changing the language settings or when logging onto the system again.

**Alternatively (start parameters possible)**

**http://<host>:<port>/web-<repositoryname>/logon.html**

For example: *http://ELOSERVER:9090/web-Repository/logon.html*

From this entry point, you will also be taken to the logon page. The entry point can be adjusted based on start parameters (see below), which affect various presets (such as client language, start page, and so on).

**Single sign-on (SSO)**

**http://<host>:<port>/web-<repositoryname>/sso.html**

For example: *http://ELOSERVER:9090/web-Repository/sso.html*

This page attempts to use SSO to log in to the repository. If the logon is successful, you are taken to the main page of the ELO Web Client. Otherwise, you will be redirected to the manual logon.

**Alternatively (start parameters possible)**

**http://<host>:<port>/web-<repositoryname>/logon/index.jsp**

For example: *http://ELOSERVER:9090/web-Repository/logon/index.jsp*

This entry point serves as an alternative for SSO logon. The entry point can be adjusted based on start parameters (see below), which affect various presets (such as client language, start page, and so on).

**Direct view**

In fact, this is not a home screen but rather a kind of interface, helping to open a specific document. You need a GUID as a parameter for this. With this, the browser automatically receives a link that refers to the document with the GUID entered. If the browser cannot display the document, then a predefined page appears depending on the browser setting (such as a pop-up window).

Use the following entry point for direct view:

**Logon with GUID**

**http://<host>:<port>/web-<repositoryname>/guid.jsp?guid=<GUID>**

For example: *http://ELOSERVER:9090/web-Repository/guid.jsp?guid=(4BE6C7FB-7F13-4297-93E5-3A26AD22EFEF)*

For compatibility reasons, this logon points to the direct view. Therefore, a GUID must be entered as the parameter.

**E-mail search**

This page restricts the functions to the search functions. The focus here is on searching for e-mails.

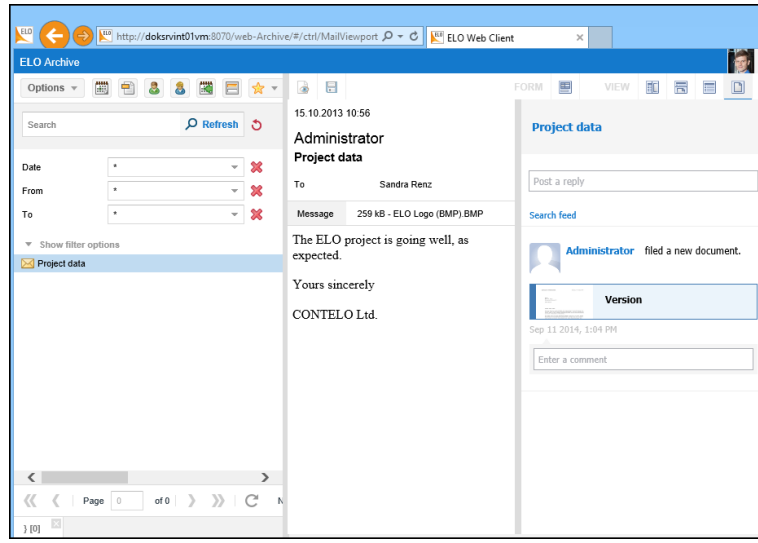



Fig. 147: E-mail search of the ELO Web Client

**Filter**

The e-mail search can be restricted via filters like the search in the *Search* work area. Some filters can be preset via the configuration page:

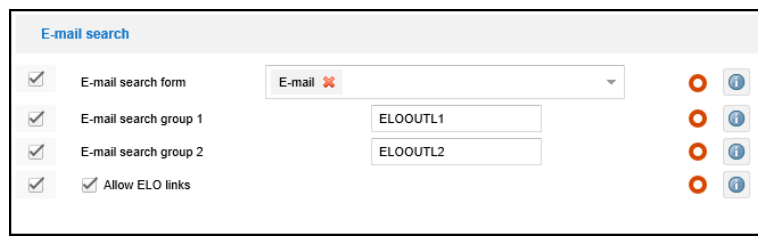



Fig. 148: Configuration for the e-mail search

*Configuration > Technical > E-mail search*

If you neither enter something to the input field *From* nor to the *To* input field, then the search starts with the predefined search form.

In case there is no configuration available, then the e-mail search starts automatically and searches through the entire repository.

For e-mail search, use the following entry point:

**http://<host>:<port>/web-<repositoryname>/#/ctrl/MailViewport**

**Entry point via start parameters**

Further parameters can be entered for some logons. These parameters are simply attached to the URL when called up. Always separate the first parameter from the URL with an '?'. All additional parameters are separated with an '&'. The respective value is specified with an '='.

**http://<host>:<port>/web-<repositoryname>/ix/logon.jsp**

For example: *http://ELOSERVER:9090/web-Repository/ix/logon.jsp?locale=fr&user=Anderson*

The following parameters are available:

**locale**: Determines the language setting for the current session. The Web Client currently supports German, English, French, Italian, Portuguese, Dutch, Polish, Czech, Hungarian and Russian.

**startPage**: Determines the landing page to be opened after logging on. The following values are possible: Main page = 1, Direct View = 3 and E-mail search = 4.

**mailSearch**: The "true" value serves as an equivalent to startPage = 4. This parameter is deprecated and is only listed for compatibility purposes.

**GUID**: GUID of a document, required for the document view and can be specified for the main page. The value to be entered is the GUID of a document that should be entered in parentheses, such as (9C0E2DA7-C1C6-4856-90D7-A50DA876F252).

**Logon with start parameters for logon information**

**http://<host>:<port>/web-<repositoryname>/ix/urlLogin.jsp?user=<user name>&pw=<password>**

Enter the parameters for the user name for this logon page (*user*) and password (*pw*). After SSO, additional parameters are evaluated as well and you are then redirected to the corresponding start page.

**Please note**: This logon page displays the user name and password in clear text. If Secure Socket Layer (SSL) was set up, the parameters for transfer are encrypted, but will still appear in plain text in the browser or in the browser history. This also applies for server logs.

# Settings via the ELO Application Server Manager

Use the ELOprofessional Application Server Manager or the URL `<server>:<port>/web-<repositoryname>/status` to call up the ELO Web Client status page.

For example: *http://ELOSERVER:9090/web-Repository/status*

This page shows the installed Client version. In addition, you can reload the status, edit settings, logon or open the documentation of the programming interface.

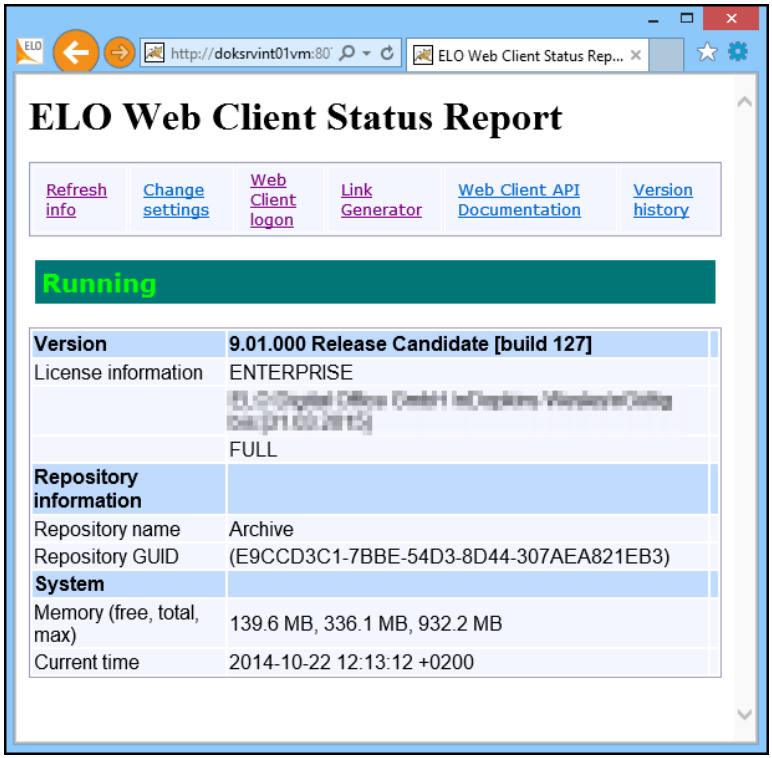



Fig. 149: ELO Web Client status page

**Refresh info**

Use the *Refresh info* link to refresh the status information for the ELO Web Client.

**Change settings**

1. Click the *Change settings* link.

**Information**: An ELO administrator logon is required to make any changes to the configuration settings.

Fig. 150: Confirmation of the logon information

The *Windows Security* dialog box with the logon for the ELO Web Client settings appears.

2. Enter your ELO administrator logon and the corresponding password, and click *OK*.

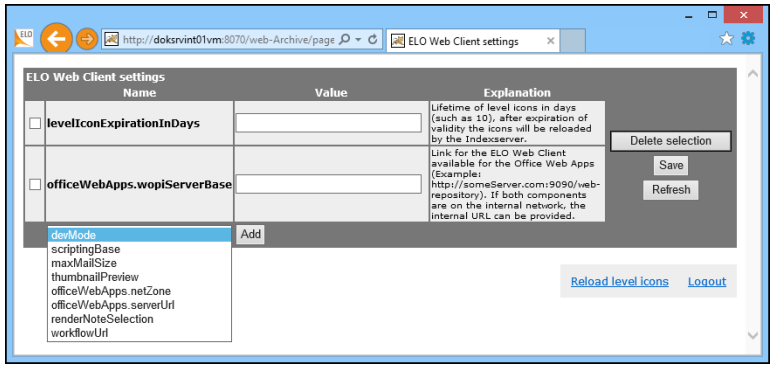



Fig. 151: The ELO Web Client settings with different options

The *ELO Web Client settings* page appears.

Use the drop-down menu to add different options to the view. The following settings are available:

**devMode**: Activates (1) or deactivates (0) developer mode. If developer mode is activated and the Web Client is started, then all scripts and icons will be loaded into the folder called *dev* and can be edited there. This folder is located in the ELO installation directory under `...\server\webapps\web-<Archivname>\dev`.

**levelIconExpirationInDays**: Icons for the object type indicator of the documents in the repository will be saved on the Indexserver and requested by the ELO Web Client. The icons are then saved by the client. To ensure that the Client always uses the current icons, you can determine here after how many days the icons should be requested by the Indexserver again.

**officeWebApps.wopiServerBase**: This option is required for the connection between the Microsoft Office Web Apps and the ELO Web Client. Enter the URL for the ELO Web Client here.

**scriptingBase**: If needed, enter an alternative GUID for the *Web Client Scripting Base* folder.

**maxMailSize**: Specify the maximum size (in kB) for e-mails that will be shown.

**thumbnailPreview**: A value of `1` specifies that a preview image is only prepared for the first page of a document.

**officeWebApps.netZone**: Enter a value for a Microsoft Office Web Apps Netzone. You need to decide whether you want to address an internal URL or an external URL.

**officeWebApps.serverUrl**: Enter the URL for the Microsoft Office Web Apps server.

**renderNoteSelection**: Determine here whether a frame should be placed around annotations on documents when the image preview is used (1 = without frame, 0 = with frame).

**workflowUrl**: If needed, enter an alternate URL for the ELOwf module.

**Information**: The temporary directory is configured via the server setup starting with ELO 9. The settings will be stored to the *config.xml* file. This file is located in `...\config\web-<repositoryname>`. The *tmpDir* option is no longer integrated in the ELO Web Client settings of the ELO Application Server.

3. Make the desired changes.

4. Click *Save* to save the changes you made.

The saved changes are applied.

**Delete selection**

If you want to completely undo a setting, delete the respective entry from the list.

1. Choose the setting that you want to delete. To do so, select the check box next to the respective setting.

2. Click the *Delete selection* button.

**Refresh**

1. Click *Refresh*, to reset the page.

**Please note**: Changes that have not been saved are lost when you use the *Refresh* function.

**Reload level icons**

All icons for the type indicator of the documents in the repository (level icons) will be requested by the Indexserver. It is advised to delete the cache of your browser because old images may still be in the cache.

**Logout**

Logout: Click here if you want to leave the settings page. You automatically return to the ELO Web Client status page.

**Web Client logon**

Use the *Web Client* logon link to reach the page for the manual logon. Log on with your logon information. You are directed to the main page of the ELO Web Client.

**Link Generator**

Use the link generator to create individual entry points. This way, for example, each user that uses the ELO Web Client gets a separate entry point. The link generator generates a link with the corresponding start parameters depending on the preset. This way, they must not be assembled manually. (Also see *Start pages and entry points* section).

1. Click the *Link Generator* on the ELO Web Client status page.

The *Windows Security* dialog box with the logon for the link generator appears.

2. Enter your ELO administrator logon and the corresponding password, and click *OK*.

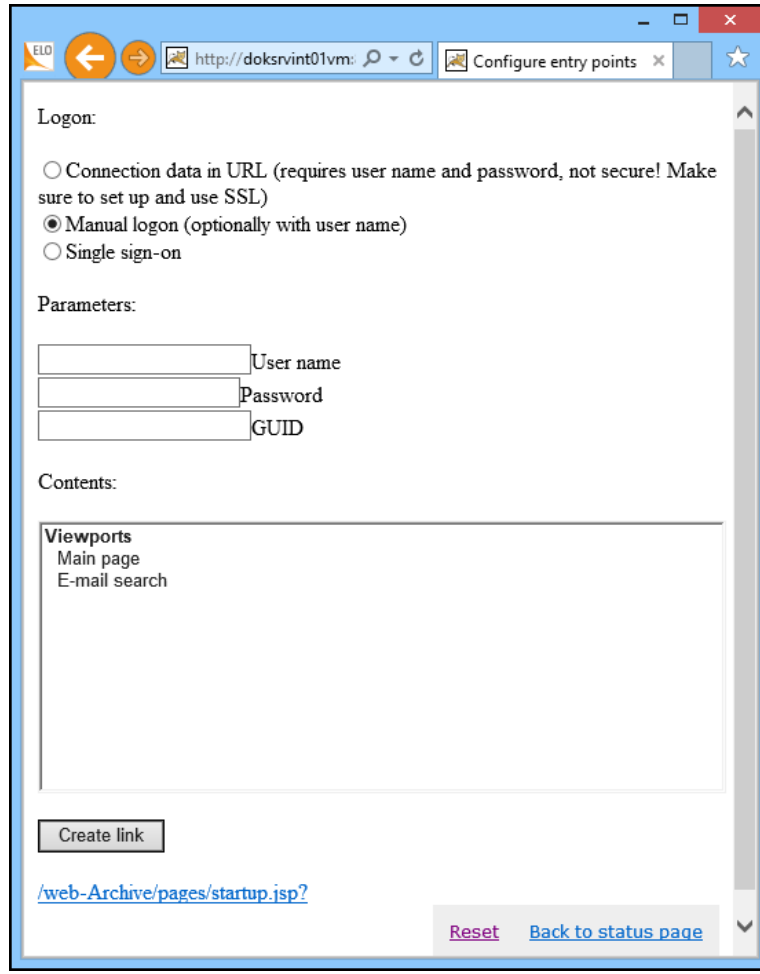



Fig. 152: Configuring entry points via the link generator

The *Configure entry points* page appears.

3. Create an entry point. The following options are available for this:

**Logon** Choose a logon method: *Connection data in URL*, *Manual logon* or *Single sign-on*).

**Parameters** If necessary, enter the required parameters. Which parameters you need depends on the selected logon method and the selected content (also see *Start pages and entry points* section).

**Contents** Choose in which view the ELO Web Client should start after logging on.

4. Click *Create link*.

The corresponding link appears below the *Create link* button. For this, the server name and the port are not specified. If you, for example, want to pass the link on to a colleague, add the server name and the port.

**Reset** Use the *Reset* link to reset all settings of the link generator to the default values.

**Back to status page** Use the *Back to status page* link to return to the status page of the ELO Web Client.

**Web Client API Documentation** Use the *Web Client API Documentation* link on the status page of the ELO Web Client to call up the user manual for the ELO Web Client Scripting API.

**Version history** Use the *Version history* link on the status page of the ELO Web Client to call up the current version history of the ELO Web Client. Here you can see what changes have been made in the last updates.

# Troubleshooting

**Display errors in Internet Explorer**

The ELO Web Client supports the current versions of all common browsers.

**Problem**: In Microsoft Internet Explorer, there may be some display errors regarding compatibility view.

**Solution**: Check whether compatibility view is activated and deactivate it.

**Information**: The following instructions refer to older versions of Microsoft Internet Explorer. Starting with version 11, the following configuration can no longer be made.

1. Open Microsoft Internet Explorer.
2. Press the F12 key to activate the developer tools.

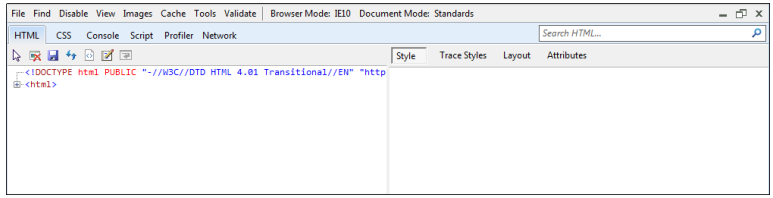



Fig. 153: Microsoft Internet Explorer Developer Tools

A window with developer tools appears.

3. Click the *Browser Mode* menu name.

A drop-down menu appears.

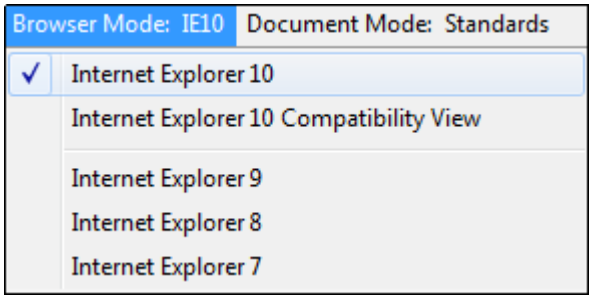



Fig. 154: Changing the browser mode

5. Place the check mark before the entry *Internet Explorer 10*. Follow the same procedure for Internet Explorer 9.

6. Click the *Document Mode* menu name.

A drop-down menu appears.

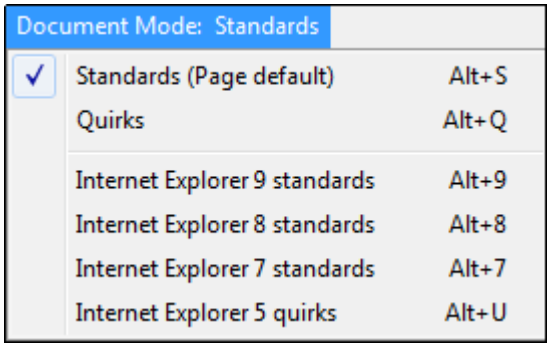



Fig. 155: Document mode to 'Defaults (page default)'

7. Place a check mark before the entry *Standards (page default)*.

8. Click the "Close" button.

**Result**: Compatibility View is deactivated.

**Display errors in the intranet**

**Problem**: Microsoft Internet Explorer activates Compatibility View by default when you access the ELO Web Client via an intranet connection. This may lead to display errors.

**Solution**: Change the Compatibility View settings.

1. Open Microsoft Internet Explorer.

2. Press the ALT key to show the menu bar.

3. Click *Extras* in the menu bar.

A drop-down menu appears.

4. Click the *Compatibility View Settings* command.

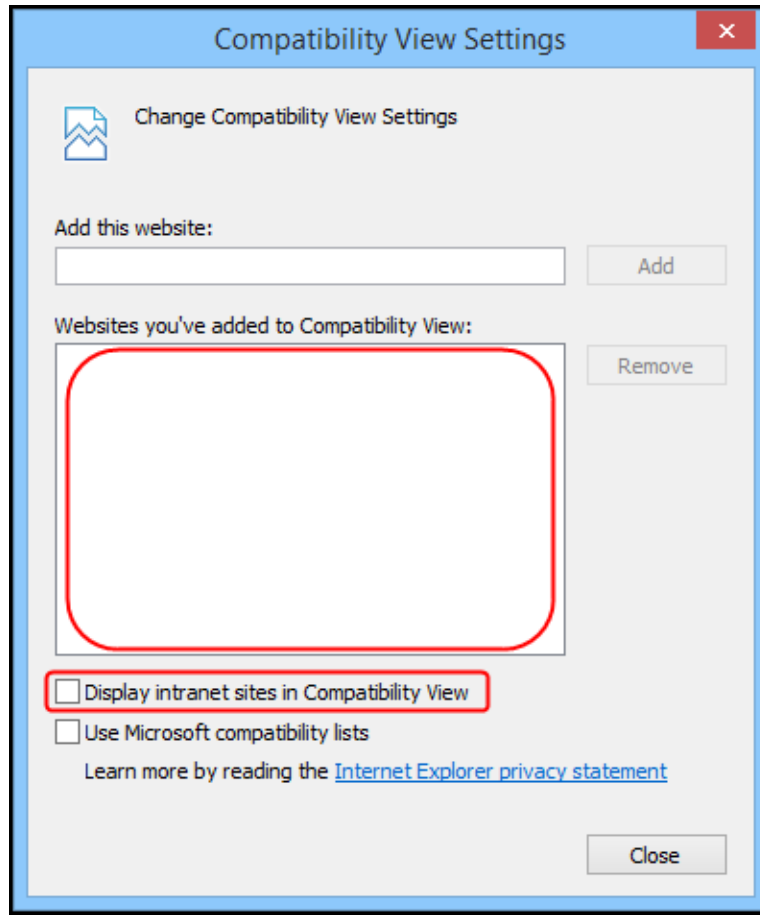



Fig. 156: 'Settings for compatibility view' dialog box

The *Compatibility View Settings* dialog box appears.

5. Remove the address of the Web Client from the list of websites added to Compatibility View.

6. Clear the check box for *Display intranet sites in Compatibility View*.

7. Click the *Close* button.

**Result**: Compatibility View for intranet sites is deactivated by default.

# Configuration file

During the installation of the ELO Web Client, a service account for reading the Configuration is queried. The installation routine stores the entries to the configuration file of the ELO Web Client, `config.xml`. The password is encrypted for this.

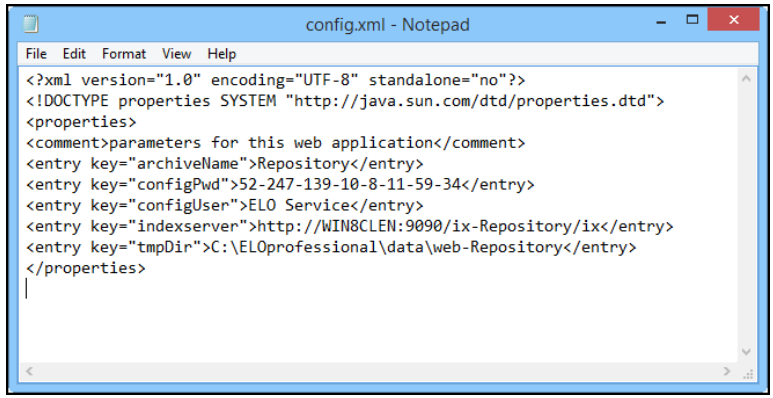



Fig. 157: Example for the "config.xml" configuration file.

You can also make these settings manually by entering the corresponding values for `configUser` and `configPwd`.

**Change the password for the service account**

If you changed the password for the service account, enter the changed password to `configPwd`.

**Optionally**: To enter your password encrypted, use the *password.bat* help program from the server setup directory of the installation DVD.

**Please note**: If you enter the password for the Service Account unencrypted, you will receive a warning in the log file of the ELO Web Client (example: `web-arc-001.log`), together with a notice on what the encrypted password is. Apply the encrypted password string to the `config.xml` configuration file under `configPwd`.

# Scripting API

A scripting API has been developed for the Web Client to develop extensions. Currently, the interface refers to the initial page of the Client.

The *Web Client Scripting Base* folder is in the repository under *Administration*. Relevant files will be read from this folder.

If this folder is not available, you can alternatively create a *Scripting base* folder on the relevant page in the ELOprofessional Application Server Manager. Normally, the folder *Web Client Scripting Base* will be created during the installation of ELO.

If a user starts the initial page of the Client, all scripting, CSS and image files (if the user has sufficient rights) will be read out and loaded dynamically.

**Development**

To facilitate the work with the interface, some functions have been integrated and will be explained in the following section:

**DevMode**: You can also activate developer mode. Consequently, the relevant entry must be changed in the settings of the ELOprofessional Application Server Manager.

In developer mode, all JavaScript files will be loaded individually when starting the main page. This makes troubleshooting much easier. In addition, the folder *dev* (in the ELO installation directory under `...\server\webapps\web-<repositoryname>\dev`) is checked for additional script, CSS and image files. These files are integrated dynamically when starting the main page.

**Please note**: It is **not** recommended to use developer mode in productive usage.

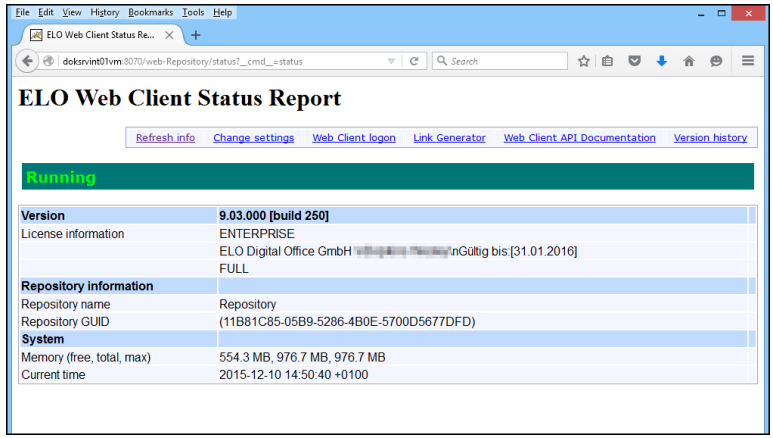



Fig. 158: Link to the Web Client API documentation

**API Documentation**: An API documentation is available which has been created automatically and can be opened by clicking the corresponding link on the status page of the Web Client.

# Appendix

This chapter provides important additional information.

# Website

Visit the ELO Digital Office GmbH website to find additional information on our software. This information may be useful for users, administrators and developers. Most areas are accessible to all visitors while others require a logon right. You will require a logon for other information areas.

You can find our website on the Internet at:

**`http://www.elo.com`**

# Glossary

The glossary contains explanations on some terms in the ELO Web Client:

**Viewer pane** A specific area in the ELO Web Client where the preview of a document will be displayed. The viewer pane can be adjusted according to your personal preferences.

**Direct view** The content of a document can be displaying using *Direct view*. For this, the corresponding entry point in form of a URL with the GUID of the document must be entered in the address bar in the browser.

**Entry** In ELO, the term *entry* is the general term for folders and documents.

**Entry point** The *entry point* is the position where the execution of the application has been formally started. Enter the respective entry point for the ELO Web Client in the address line of your browser.

**GUID** Acronym for *Globally Unique Identifier*. This is a globally unique number with 128 bits (16 bytes), which is used in distributed computer systems to uniquely identify files and documents. In the ELO Web Client, the GUID of an entry can be used to view a document with the direct view option.

**E-mail search** The *E-mail search* offers a separate entry point where you can open any view of the ELO Web Client which has been specially optimized for the e-mail search. You can use a search form to automatically fill in existing fields in e-mails based on which the search will be performed. Individual hits can be opened in the document preview.

**Start parameters** You can enter additional parameters for some entry points, which are used when loading the logon page. You can, for example, determine the language setting for a session with the `locale` parameter.

# Disclaimer of liability

**ELO Digital Office GmbH**, Tübinger Straße 43, 70178 Stuttgart, Germany
ELO Digital Office AT GmbH, Leonfeldner Straße 2-4, A-4040 Linz, Austria
ELO Digital Office CH AG, Lagerstrasse 14, CH-8600 Dübendorf, Switzerland
The ELO website is available at www.elo.com

ELO Digital Office, the ELO Logo, elo.com, ELOoffice, ELOprofessional and ELOenterprise are trademarks of ELO Digital Office GmbH in Germany and/or other countries. Microsoft ®, MS ®, Windows ®, Word ® and Excel ®, PowerPoint ®, SharePoint ®, Navision ® are registered trademarks of Microsoft Corporation in the USA and/or other countries. Other company, product, or service names may be trademarks by other companies.

This publication serves only as non-binding general information and is not a substitute for a detailed, individual consultation. The information contained in this publication can be changed at any time without prior notification. Technical characteristics and functions may vary, particularly from country to country.

You can obtain the latest information on ELO products, contractual conditions and prices from the ELO associations and the ELO business partners, and/or from the ELO Channel partners. The product information shows the present status. Subject and extent of the services are exclusively defined in the respective contracts.

ELO does not guarantee that its products or other services ensure compliance with specific laws or regulations. The customer is responsible for adherence to security regulations and other regulations defined by national and international law.

The right to make changes, errors, and misprints is reserved. Reproduction and distribution, in part or in whole, is only allowed with written consent from ELO Digital Office GmbH.
© Copyright ELO Digital Office GmbH 2015. All rights reserved.

# Index


'User account' button - 14
About - 50
Add, quick launch icons - 129
Add, setting - 126, 128
Add as link - 67
Additional filters - 101
Ad hoc workflow - 53
Adjust, tables - 17
Administration folder - 104
All document versions - 58
API Documentation - 151
Attachments - 58
Attachment versions - 58
Blue set - 118
Browser - 10
Browser, supported - 10
Browser version - 10
Cancel - 55
Change, password - 149
Check out - 56
Click OCR - 37
Clipboard - 21, 58, 74
Clipboard, counter - 21
Clipboard, save contents - 21
Columns, sorting - 17
Comment - 93
Configuation, user-specific - 118
Configuration - 118, 149
Configuration, configuration sets - 131
Configuration, display - 123
Configuration, document preview - 127
Configuration, everyone - 119
Configuration, functions - 129
Configuration, global - 119
Configuration, group-specific - 118
Configuration, inheritance hierarchy of the settings - 123
Configuration, keywording - 126
Configuration, open - 56
Configuration, quick launch icons - 128
Configuration, technical - 130
Configuration, view data - 131
Configuration, work areas - 129
Configuration file - 149
Configuration sets - 118
Configuration sets, assign - 131
Conventions - 6
Copy, insert - 65
Copying, folder - 57
Copy options - 58
Copyright - 5
Copy to Clipboard - 58
Counter - 21
Delete - 60
Delete, favorites - 63
Delete, link - 66, 67
Delete, margin note - 60
Delete, quick launch icons - 129
Delete, setting - 127, 128
Delete, view filter - 60
Delete selection - 102
Delete version - 61
developer mode - 150
DevMode - 150
Direct view - 134
Display, settings - 123
Display area, table view - 17, 78
Document changes, discard - 74
Document preview - 72
Document preview, settings - 127
Document preview only - 16
Document versions - 61
Drag-and-drop - 24
Edit, feed - 94

Edit, keywording - 86
Edit, setting - 119
Edit, settings - 120
Edit in Office - 62
ELO Application Server - 138
ELO menu - 14
ELO Web Client Internet Access - 11
ELO Web Client settings - 139
E-mail search - 134
E-mail search, filter - 135
Entry, move - 68
Entry points - 133
Escalations - 63
Examples of use - 23
Examples of use, add margin note - 40
Examples of use, Click OCR - 37
Examples of use, drag-and-drop - 24
Examples of use, insert file - 27
Examples of use, search for a document - 30
External link - 58
Ext JS Framework - 10
Favorites - 63
Favorites, add - 63
Feed - 16, 89, 104
Feed, comment - 93
Feed, edit - 94
Feed, hashtag - 90
Feed, mention - 90
Feed, post a reply - 89
Feed, reference - 90
Feed, search - 92
Feed, subscribe - 92
Feed, visibility - 91
File, insert - 65
File, save as - 74
File attachment, add - 53
Filter, additional filters - 101
Filter, date - 32, 49
Filter, editor - 32, 49
Filter, filed by - 32, 49
Filter, filing date - 32, 49
Filter, form - 32, 49
Filter, hashtag - 100
Filter, index field - 32, 49
Filter, keywording form - 99
Filter, My ELO - 21
Filter, new since - 98
Filter, object type - 50
Filter, post creator - 99
Filter, post type - 100
Filters - 32
Folder, copying - 57
Folder, search - 18
Folder structure and documents - 58
Form, show - 76
Full text database - 63
Function, about - 50
Function, accept substitution - 51
Function, accept workflow - 52
Function, add as link - 66
Function, add attachment - 53
Function, add favorite - 63
Function, ad hoc workflow - 53
Function, assign substitute - 53
Function, attachments - 55
Function, cancel - 55
Function, change password - 55
Function, check out - 56
Function, copy - 57
Function, copy options - 58
Function, copy to clipboard - 58
Function, create external link - 58
Function, create reference - 59
Function, date - 49
Function, delegate workflow - 60
Function, delete - 60, 60
Function, delete favorites - 63
Function, delete version - 61

Function, document preview - 72
Function, document versions - 61
Function, Edit in Office - 62
Function, edit keywording - 65
Function, editor - 49
Function, edit reminder - 62
Function, escalations - 63
Function, favorites - 63
Function, filed by - 49
Function, filing date - 49
Function, form - 49
Function, full text database - 63
Function, general margin note - 59, 64
Function, go to - 64
Function, group tasks - 64
Function, hand off workflow - 64
Function, horizontal - 64
Function, image preview - 64
Function, index field - 49
Function, insert copy - 65
Function, insert file - 65
Function, keywording preview - 65
Function, leave configuration - 65
Function, link - 65, 66
Function, list - 67
Function, load new version - 67
Function, logout - 67
Function, move entry - 68
Function, new folder - 68
Function, new view filter - 68
Function, object type - 50
Function, open configuration - 56
Function, open in read-only mode - 61, 69
Function, open margin note - 70
Function, pass forward workflow - 70
Function, permanent margin note - 59, 72
Function, personal margin note - 59, 72
Function, refresh - 72
Function, reminder - 73
Function, remove from Clipboard - 74
Function, remove from search results - 74
Function, remove lock - 74
Function, rename view filter - 74
Function, save file as - 74
Function, search keyboarding - 74
Function, set as non-deletable version - 62
Function, set as working version - 61
Function, show form - 76
Function, show original document - 72
Function, show workflow - 61
Function, start workflow - 76
Function, substitution tasks - 78
Function, table - 78
Function, upload and check in - 78
Function, vertical - 78
Function, Web Client help - 78
Functions, settings - 129
General margin note - 64
Go to - 64
Go to, link - 66, 67
Green set - 118
Group tasks - 64
Hashtag - 90, 100
Horizontal - 64
Image display - 114
Image display, functions - 115
Image preview - 64
Index fields - 81
Inheritance hierarchy of the settings - 123
Insert copy - 57
Insert file - 27
Installation - 10
Installation, requirements - 10
In use - 21
In use, counter - 21
iSearch - 30
Keep notes - 58
Keywording - 79

Keywording, edit - 65, 86
Keywording, index fields - 81
Keywording, keyword lists - 82
Keywording, mandatory fields - 81
Keywording, OCR - 83
Keywording, search - 74
Keywording, settings - 126
Keywording and document preview - 16, 78
Keywording form - 79, 99
Keywording preview - 20, 65, 65
Keywording preview only - 16
keyword lists - 82
Launching the program - 133
Leave configuration - 65
License Agreement - 5
Link - 65, 66
Link Generator - 142
List view - 16, 67
Logon - 133
Logon, direct search - 134
Logon, parameters - 136
Logon, SSO - 134
Logout - 67, 67
Main page - 133
Mandatory fields - 81
Manual logon - 133
Margin note, adding - 40
Margin note, creating - 59, 64, 72, 72
Margin note, deleting - 60
Margin note, general - 64
Margin note, permanent - 72
Margin note, personal - 72
Mark as important - 102
Maximize preview - 15
Mention - 90
My ELO - 21, 95
My ELO, additional filters - 101
My ELO, apply filter - 101
My ELO, delete selection - 102
My ELO, escalated workflows - 97
My ELO, filter categories - 98
My ELO, hashtag - 100
My ELO, hide post - 102
My ELO, keywording form - 99
My ELO, mark as important - 102
My ELO, new since - 98
My ELO, post creator - 99
My ELO, post type - 100
My ELO, reset filter - 101
My ELO, show filter options - 98
My ELO, show workflows - 96
My ELO, started workflows - 97
My ELO, undo - 103
New, view filter - 68
New folder - 68
New since - 98
New version, load - 67
OCR - 37
Only the basic entry - 58
Only the folder structure - 58
Open, in read-only mode - 69
Open in read-only mode - 61, 69
Original document, show - 72
Overview, attachments - 55
Password, change - 55, 149
Permanent margin note - 72
Personal margin note - 72
Post, reply - 89
Post creator - 99
Post type - 100
Preview, document - 72
Preview, folder - 72
Preview, full text database - 63
Preview, keywording - 65
Preview, original document - 72
Preview, preview document - 64
Preview, show form - 76
Preview bar - 15

Preview document - 64
Profile, user - 107
Profile image - 104, 105
Program dialog box, customizing - 22
Program interface, 'User account' button - 14
Program interface, ELO menu - 14
Program interface, feed - 16
Program interface, keywording preview - 20
Program interface, maximize preview - 15
Program interface, preview bar - 15
Program interface, quick start icons - 15
Program interface, ribbon - 14
Program interface, split bar - 20
Program interface, tabs - 14
Program interface, tree view - 20
Program interface, viewer pane - 16
Program interface, work areas - 20
Quick launch icons, add - 129
Quick launch icons, settings - 128
Quick start icons - 15
Quick start icons, delete - 129
Red set - 118
Reference - 90
Reference, copy - 58
Reference, create - 59
Refresh - 72
Refresh interval, tasks - 123
Reminder - 21, 73
Reminder, edit - 62
Remove from Clipboard - 74
Remove from My ELO - 102
Remove from search results - 74
Remove lock - 74
Rename, view filter - 74
Repository - 20
Ribbon, tabs - 14
Scripting API - 150
Scripting interface - 150
Scrolling, infinite - 20
Search - 20
Search, feed - 92
Search, filters - 32, 49
Search, iSearch - 30
Search, OCR - 37
Search, viewer pane - 18
Searching a document - 30
Search result - 74
Set as non-deletable version - 61
Set as working version - 61
Setting, add - 126, 128
Setting, delete - 127, 128
Setting, edit - 119
Settings, edit - 120
Settings, for another user - 120
Settings, for your own account - 119
Show form - 16
Show full text database content - 16
Show original document - 15
Show preview document - 15
Sorting, columns - 17
Sorting, options - 17
Sort order - 18
Split bar - 20
Start page, direct view - 134
Start page, e-mail search - 134
Start page, main page - 133
Start parameters - 136
Status page - 140
Subscribe, feed - 92
Subscribe, hashtag - 90
Substitute, assign - 53
Substitution, accept - 51
Substitution tasks - 78
Tables - 17
Tables, adjust - 17
Table view - 17, 78
Tabs - 14
Tasks, counter - 21

Tasks, refresh interval - 123
Technical, settings - 130
Text display - 112
Text display, functions - 113
Trademarks - 5
Tree view - 20
Undo - 103
Upload and check in - 78
User - 49
User, profile - 107
userimage - 105
User image - 105
User profile - 104
Vertical - 16, 78
View data, reset - 131
Viewer pane - 16
Viewer pane, list view - 16, 67
Viewer pane, search folder - 18
View filter, delete - 60
View filter, insert - 68
View filter, rename - 74
Visibility - 91
Web Client help - 78
Website - 153, 153
Work area, Clipboard - 21
Work area, In use - 21
Work area, My ELO - 21
Work area, repository - 20
Work area, Search - 20
Work area, Tasks - 21
Work area bar - 20, 68
Work areas - 20
Work areas, settings - 129
Workflow - 21
Workflow, accept - 52
Workflow, delegate - 60
Workflow, display - 61
Workflow, forward - 70
Workflow, hand off - 64
Workflow, start - 76