



# **ELO packages**

ELO Workspaces

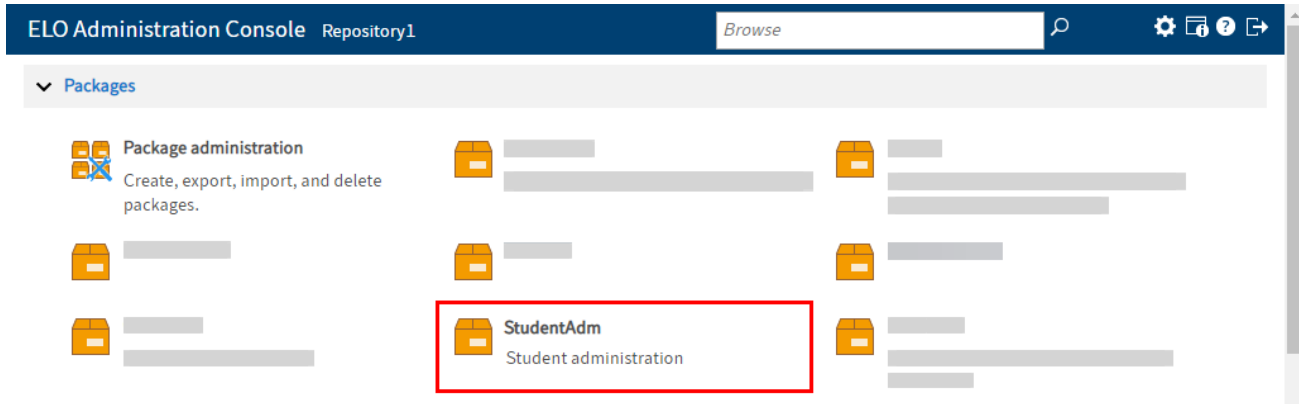


# Table of contents

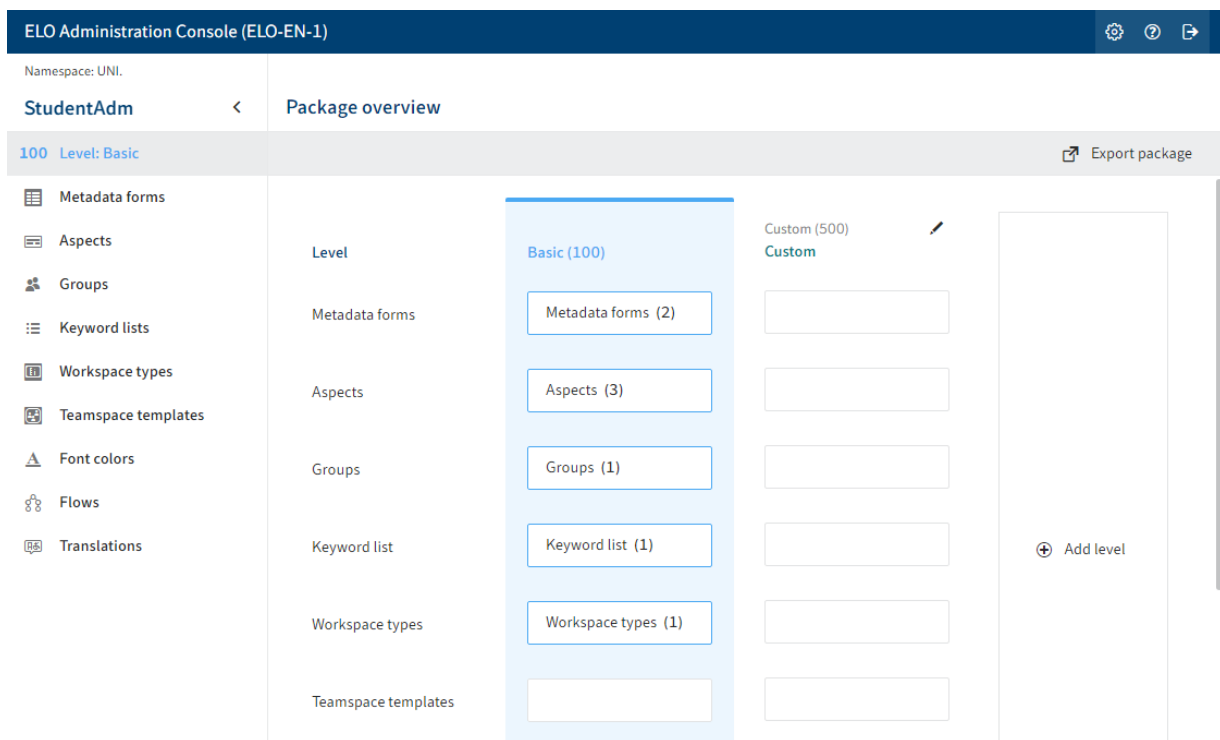
<b>Workspaces</b>	<b>3</b>
Create workspace type	3
Configure workspace type	5

# Workspaces

## Create workspace type



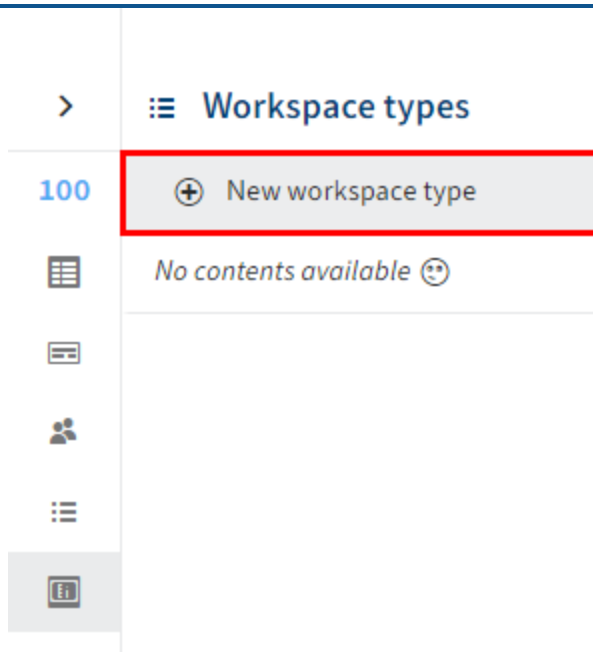
1. In the menu area of the ELO Administration Console, select the package where you would like to create the workspace type.



The package opens.

2. Select *Workspace types*.

The *Workspace types* dialog box appears.



3. Select *New workspace type*.

The Configuration area for the new workspace type opens.

#### Information

If you select an existing workspace type, you can also configure it in the *Workspace type* dialog box.

Once you are finished with configuration, select *Save workspace type* to save it.

A new workspace type is created.

## Configure workspace type

Once you have created a workspace type, you can configure it.

The screenshot displays the ELO Administration Console (ELO-EN-1) interface. The top navigation bar includes a hamburger menu, the title 'Workspace types', and a 'Student administration' sub-header. The left sidebar shows a list of workspace types, with 'Student administration' selected. The main content area is divided into sections: 'Overview' with fields for 'Identifier' (STUDENTADMINISTRATION), 'Translation variable' (UNI.WORKSPACE.STUDENTADMINISTRATION), and 'Name' (Student administration); 'Permitted metadata forms'; 'Views'; 'Filter trees'; and 'Roles'. A 'Delete workspace type' button is visible in the top right corner of the main content area.

The *Workspace type* dialog box offers the following actions:

- Enter [basic data](#) for the workspace type
- Define [permitted metadata forms](#)
- Create [views](#)
- Add [filter trees](#)
- Define [roles](#)
- Delete workspace type

### Please note

You can only delete a workspace type if it is not being used.

**Please note**

If you make changes to the workspace type after workspace instances have been created, these changes are applied to all existing workspace instances of this workspace type, unless you've already made changes in the workspace instance in the corresponding area.


Roles added to the workspace type later on are not applied to existing workspace instances.

**Enter basic data for the workspace type**

Basic data about the workspace type is entered in the *Overview* area.

1. Enter a technical name in the *Identifier* field.
2. Enter a translation variable into the *Translation variable* field.
3. Enter the display text of the translation variable into the *Name* field.
4. Select *Save* (floppy disk icon).

**NewWorkspace**


 Delete workspace type

▼ Overview


Identifier \*

FFFF45D904AEFF5F410C96188D44D32D4B62

Translation variable

EXTEN.WORKSPACE.FFFF45D904AEFF5F410C96188D44D32D 

Name

Invoices 

▼ Permitted metadata forms

Alternative: Select an existing translation variable with the *List* button (list icon).

The content of the *Name* field will be saved as the display text of the translation variable. Here, the currently selected display language applies.

5. Select *Save workspace type*.

The workspace type is saved.

**Define permitted metadata forms**

In the *Permitted metadata forms* area, you define which forms can be used in the workspace.

▼ Permitted metadata forms

⊕ Add metadata forms

▼ Views

1. Select *Add metadata forms*.

### Add metadata forms

✕

Select all metadata forms to be available within the workspace.

**Selected:**

<input type="checkbox"/>	Show metadata forms from all packages	🔍
<input type="checkbox"/>	Course	
<input type="checkbox"/>	Exercise	
<input type="checkbox"/>	Faculty	
<input type="checkbox"/>	Lecture	
<input type="checkbox"/>	Seminar	
<input type="checkbox"/>	Student	
<input type="checkbox"/>	Subject	
<input type="checkbox"/>	Tutorial	

The *Add metadata forms* dialog box appears.

2. Select the metadata forms to make available in the workspace.
3. Select *Apply*.

The metadata forms will be added to the workspace type.

Option 1: Disable the option *Entries may be created manually* if users should not be allowed to make entries in the metadata form here.

This makes sense if the metadata form is used as an inheriting metadata form that acts as a kind of parent category but is not intended for new objects. It can, however, be used for lists and dashboards.

Option 2: Open the *Advanced settings* area and make an entry in the *Translation variable* and *Name* fields. The value in the *Name* field is displayed as a header for lists. It should be the plural form of the document type. For the *Invoice* metadata form, enter *Invoices*, for example.

4. Select *Save workspace type*.

The workspace type is saved.

## Create views

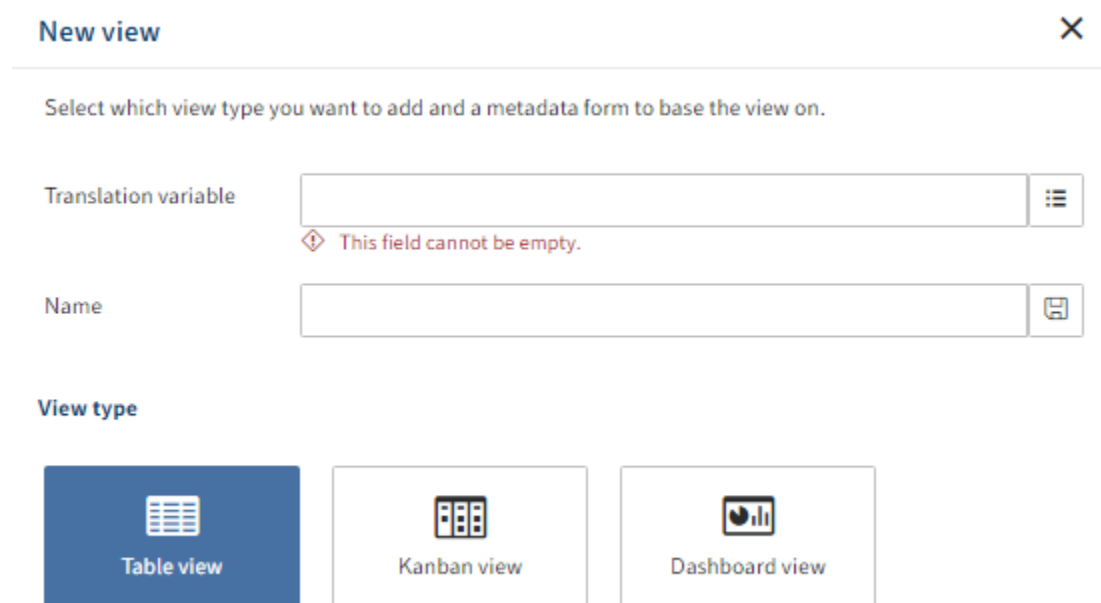
In the *Views* area, create different views for the workspace type.

### Information

At least one metadata form must be set as a permitted form to be able to add views.

## Create view

1. Select *New view*.



**New view** ×

Select which view type you want to add and a metadata form to base the view on.

Translation variable  ☰

⚠ This field cannot be empty.

Name  💾

**View type**

**Table view** **Kanban view** **Dashboard view**

The *New view* dialog box opens.

2. Enter a translation variable into the *Translation variable* field.

Alternative: Select an existing translation variable with the *List* button (list icon).



The translation variable is automatically transferred into the *Name* field.

3. Select a view type.

The following choices are available:

- Table view: The workspace type data is displayed as a table. You can adjust the table columns in a later step.
- Kanban view: The workspace type data is displayed as a kanban board. A kanban board is divided into multiple columns which represent the steps of a process. A workspace element can pass through the various stages of a process. The items are displayed as tiles or cards which can be dragged to different columns on the board. Only fields with a keyword list can be used in the kanban view.
- Dashboard view: The data of a metadata form in the workspace can be displayed in a dashboard. Dashboards serve to display various static values in charts. At least one dashboard must be set up for the metadata form. For information on how to configure dashboards for a metadata form, refer to Metadata > Metadata forms > Create dashboards.

4. Select which metadata form to use for the view.

Optional: For a dashboard view, you must select a dashboard set up in the metadata form.

5. Select *Apply*.

Depending on the option selected, an associated dialog box may open. Refer to the following sections for more information on the different dialog boxes:


- ['Table view' dialog box](#)
- ['Kanban view' dialog box](#)
- ['Dashboard view' dialog box](#)


6. As soon as you've configured the view, select *Save workspace type*.

The workspace type is saved.

## 'Table view' dialog box


Table view


←  **Students - overview**

 Delete view


**Overview**


Form

Translation variable  

Name  

**Table columns**

 Edit columns




Short name


In the *Table view* dialog box, you can edit the selected/created table view.

Only the *Short name* column is selected by default.

1. Click the *Edit columns* button.

**Add table columns** 

Select fields to add as table columns.



<input type="checkbox"/>	Field name	Name of the aspect mapping	Field type
<input type="checkbox"/>	State	ADRESS_SECONDARY	TEXT
<input type="checkbox"/>	Country	ADRESS_SECONDARY	STATUS
<input type="checkbox"/>	House number	ADRESS_SECONDARY	TEXT
<input type="checkbox"/>	Postal code	ADRESS_SECONDARY	TEXT
<input type="checkbox"/>	Floor	ADRESS_SECONDARY	TEXT
<input type="checkbox"/>	Street	ADRESS_SECONDARY	TEXT

The *Add table columns* dialog box appears.

- 2.

Select the fields to display as columns.

3. Select *Apply*.

The columns are added to the view.

Optional: Move the table columns via drag-and-drop.

The screenshot shows the 'Table view' dialog box for a view named 'Students - overview'. At the top, there is a tab labeled 'Table view' and a back arrow icon (highlighted with a red box). Below the tab is a 'Delete view' button with a trash icon. The main section is titled 'Overview' and contains three input fields: 'Form' with the value 'Student', 'Translation variable' with the value 'UNI.STUDENTS.TABLE' and a list icon, and 'Name' with the value 'Students - overview' and a save icon.

4. To close the *Table view* dialog box, select the arrow icon.

The view is saved.

### 'Kanban view' dialog box

The screenshot shows the 'Kanban view' dialog box for a view named 'Student status'. At the top, there is a tab labeled 'Kanban view' and a back arrow icon. Below the tab is a 'Delete view' button with a trash icon. The main section is titled 'Overview' and contains three input fields: 'Form' with the value 'Student', 'Translation variable' with the value 'UNI.SUDENT\_STATUS.KANBAN' and a list icon, and 'Name' with the value 'Student status' and a save icon. Below the 'Overview' section is a section titled 'Kanban columns' with a 'Field' input field and an edit icon.

In the *Kanban view* dialog box, you can edit the selected/created kanban view.

#### Please note

Only fields with a keyword list can be used in the kanban view.

Create keyword lists via the *Keyword lists* menu item in the package.

1. Select the pencil icon beside the *Field* field.

Select field

×

The kanban view can be based on a selection list field in the respective metadata form. Select this here.

	Field name	Name of the aspect mapping	Field type
<input type="radio"/>	Country	ADRESS_SECONDARY	STATUS
<input type="radio"/>	Sex	PERSON	STATUS
<input type="radio"/>	Country	ADRESS_MAIN	STATUS
<input type="radio"/>	Type	FEE	STATUS
<input checked="" type="radio"/>	Status	FEE	STATUS
<input type="radio"/>	Type of number	PHONE	STATUS
<input type="radio"/>	Type of e-mail address	E-MAIL	STATUS

Apply

Cancel


The *Select field* dialog box appears. The dialog box shows all fields with a keyword list.

2. Select a field.
3. Select *Apply*.

The *Select field* dialog box closes. The selected field is entered into the *Field* field.

4. Select the *Edit kanban columns* button.

### Edit kanban columns





<input type="checkbox"/>	Field name
<input type="checkbox"/>	Applicant
<input type="checkbox"/>	Enrolled
<input type="checkbox"/>	Exmatrikulated
<input type="checkbox"/>	Alumni
<input type="checkbox"/>	Paused

The *Edit kanban columns* dialog box opens.

5. Select which list items to display as columns in the kanban view.

Alternative: To select all items in the list, enable the check box next to the *Field name* column.

6. Select *Apply*.

The *Edit kanban columns* dialog box closes. The selected columns are added to the view.

Optional: Move the kanban columns via drag-and-drop.

7. Select *Edit tile contents*.

Edit tile contents
×

Select field

	Field name	Name of the aspect mapping	Field type
::	Faculty	MEMBERSHIP	RELATION
::	Subject	MEMBERSHIP	RELATION
::	State	ADRESS_SECONDARY	TEXT

Apply
Cancel

The *Edit tile contents* dialog box appears. You see the values of the keyword list for the selected field.

- Drag the required fields to the blank line in the upper part of the dialog box.

The fields selected here will be displayed as information on the tiles.

Option 1: To search or filter the list, use the search function (magnifying glass icon).

Option 2: Repeat step 8 for additional fields.

- Select *Apply*.

The *Edit tile contents* dialog box closes. The selected fields are entered as tile contents.

Kanban view

←

Students - overview

Delete view

Overview

Form

Student

Translation variable

UNI.STUDENTS.TABLE

⋮

Name

Students - overview

📄

- To close the *Kanban view* dialog box, select the arrow icon.

The view is saved.

**'Dashboard view' dialog box**

Dashboard view

← Courses - data overview

Delete view

**Overview**

Form Course

Translation variable UNI.DASH.COURSES

Name Courses - data overview

**Select dashboard**

Courses - data overview ▼



In the *Dashboard view* dialog box, you can edit the selected/created dashboard view.


Optional: In the *Select dashboard* field, you can change the dashboard to be displayed, if necessary.

**Information**

For information on how to configure dashboards for a metadata form, refer to Metadata > Metadata forms > Create dashboards.


Dashboard view


  Courses - data overview

 Delete view


**Overview**

Form

Translation variable  

Name  

**Select dashboard**



1. To close the *Dashboard view* dialog box, select the arrow icon.

The view is saved.

## Filter trees

Filter trees are used to filter the view of items in the workspace. Different filters can be combined in filter trees.

### Add filter tree


1. Select *New filter tree*.




### New filter tree ✕


Enter a name for the new filter tree and select a metadata form to base the filter tree on.

Translation variable \*




 This field cannot be empty.

Tree name



#### Select metadata form



☒ Students

☐ Subject

☐ Faculty

☐ Course

The *New filter tree* dialog box appears.

2. Enter a translation variable into the *Translation variable* field.
3. Enter the display text of the translation variable into the *Tree name* field.
4. Select *Save* (floppy disk icon).


Alternative: Select an existing translation variable with the *List* button (list icon).

5. Select a metadata form.
6. Select *Apply*.



The *New filter tree* dialog box closes.

Filter tree

▼ All students ✕

 Delete filter tree

**Overview**

Translation variable	TREE.STUDENTS	
Name	All students	
Form	Student	

☒ Also show entries from outside the workspace [?](#)

The *Filter tree* dialog box appears.

Optional: Check the *Also show entries from outside the workspace* option as well.

#### Please note

If this option is enabled, the contents of this filter tree are applied to all workspaces created with the same workspace type.

7. Select *Save workspace type*.

The workspace type is saved.

## Base filter

Base filters help refine the filtering of the view in the filter tree. They can be combined with other filters.

1. Open a filter tree.
2. In the *Base filter* area, select *Add filter*.

Add filter
✕

Each filter is based on a field. Select this to set the corresponding filter values.

Select field

	Field name	Name of the aspect mapping	Field type
<input type="radio"/>	State	ADRESS_SECONDARY	TEXT
<input type="radio"/>	Country	ADRESS_SECONDARY	KWL
<input type="radio"/>	House number	ADRESS_SECONDARY	TEXT
<input type="radio"/>	City	ADRESS_SECONDARY	TEXT
<input type="radio"/>	Postal code	ADRESS_SECONDARY	TEXT

Set filter value \*

The *Add filter* dialog box appears.

3. Select a field.
4. Enter a filter value under *Set filter value*. You can select or enter different values depending on the field.

### Information

For some field types, you can add conditions via *Add condition*. Conditions are added with an OR link.

5. Select *Apply*.

The filter is entered under *Base filter*.

6. Select *Save workspace type*.

The workspace type is saved.

As soon as you select an existing filter tree, the *New level* and *New list* functions become available. Refer to the following sections for more information on these functions:

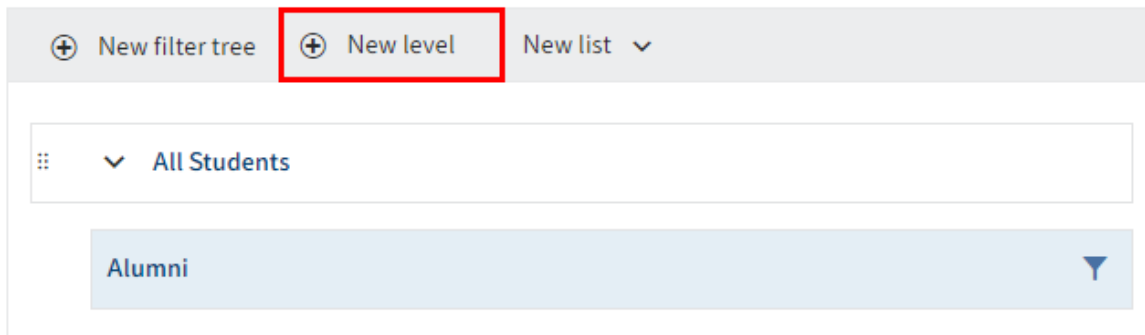
- [New level](#)
- [New list](#)

## New level

You can refine a filter in the filter levels. This allows items to be displayed with different filter combinations as needed.

1. Select a filter tree.

### Filter trees



2. Select the *New level* button to create a level.

Level

**NewLevel** ✕

🗑️ Delete level

**Overview**

Translation variable  ⋮

Name  💾

**Filter**

⊕ Add filter

No filters have been added. You can add one or more filters.

The *Level* dialog box appears.

3. Enter a translation variable into the *Translation variable* field.
4. Enter the display text of the translation variable into the *Name* field.
5. Select *Save* (floppy disk icon).

Alternative: Select an existing translation variable with the *List* button (list icon).

6. Select *Save workspace type*.

▼ **Filter trees**

The level is entered under the selected filter tree and the workspace type is saved.

### Information

You can add [filters](#) and [lists](#) to a level.

### Add filter

Add a filter to a level as follows:

1. Select *Add filter*.

	Field name	Name of the aspect mapping	Field type
<input type="radio"/>	State	ADRESS_SECONDARY	TEXT
<input type="radio"/>	Country	ADRESS_SECONDARY	KWL
<input type="radio"/>	House number	ADRESS_SECONDARY	TEXT
<input type="radio"/>	City	ADRESS_SECONDARY	TEXT
<input type="radio"/>	Postal code	ADRESS_SECONDARY	TEXT

The *Add filter* dialog box appears.

2. Select a field.

3. Enter a filter value under *Set filter value*. You can enter or select different values depending on the field.

Optional: Select *Add condition* to add more conditions to the filter. More conditions can be added with an OR link.

4. Select *Apply*.

The filter is entered in the level.

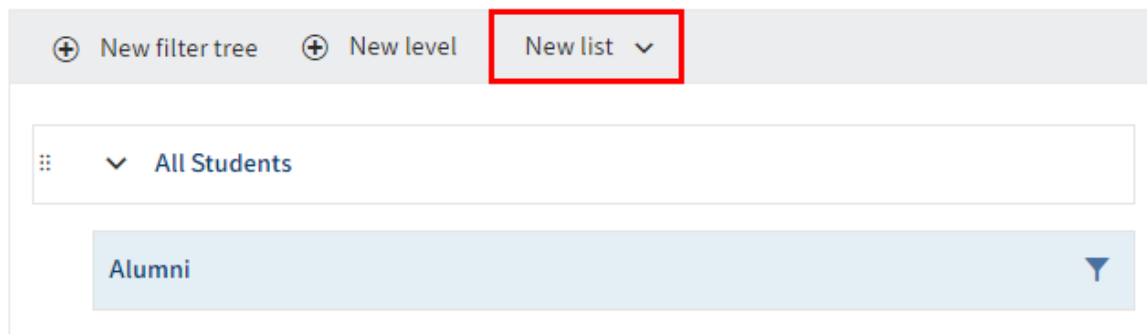
## New list

Lists are another option to filter data in the workspace. With lists, you can create filters based on the values of a field or metadata forms with inheritance. In the workspace, the matching entries are shown under a corresponding level.

1. Select a filter tree.

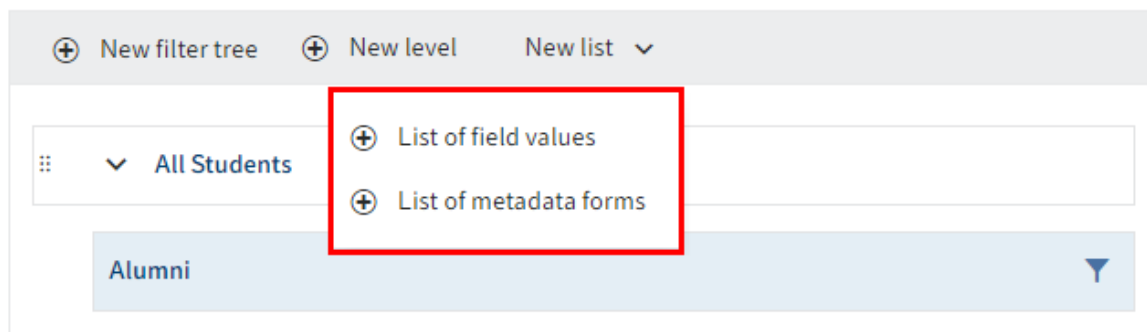
Optional: Select a level if required.

▼ Filter trees



2. Select *New list*.

▼ Filter trees



The *New list* drop-down menu opens.

3. Select a type:

- List of field values: A list based on the values of a field. This can be values you have entered or values from a keyword list.
-

List of metadata forms: A list based on a metadata form and metadata forms that inherit their settings from this metadata form (child metadata forms).

Additional settings are required depending on the type. Configuration of the different types is explained in more detail in the following sections.

4. Configure the list depending on the selected type.
5. Select *Save workspace type*.

The list and workspace type are saved.

#### Configure list of field values

New list

Set a field to base the list on. You can then choose which field values to include in the list.

Select field

	Field name	Name of the aspect mapping	Field type
<input type="radio"/>	State	ADRESS_SECONDARY	TEXT
<input type="radio"/>	Country	ADRESS_SECONDARY	KWL
<input type="radio"/>	House number	ADRESS_SECONDARY	TEXT

If you have selected the type *List of field values* from the *New list* drop-down menu, the *New list* dialog box opens.

You have to select a field that the list should be based on.

The following options are available:

- Field without keyword list: The field values previously entered form the list.
- Field with keyword list: You can choose whether the list should contain all or just individual values of the keyword list.

If the option *Apply all keywords to the list* is enabled, newly created keyword lists are also applied to existing workspace instances. The new keywords only appear in the list once they've been used in an object.

### List of metadata forms

To be able to create a list based on metadata forms, you will need a metadata form that inherits its settings to other metadata forms. These metadata forms are also referred to as child metadata forms.

If a metadata form with child metadata forms is selected, ELO automatically recognizes the child metadata forms and applies them as a value in the list.

### Define roles

Different roles can be assigned for workspaces. Roles allow you to control rights for the workspace and permissions to contents in the workspace.

#### Roles

In the *Roles* area, you can see which roles have been set up for the workspace and which settings apply for the respective roles.

#### Information

When creating a workspace in the client, these roles are created as groups in ELO.

The following roles are created with default settings:

-



Administrator: The creator of a workspace is automatically assigned the role of *Administrator*. Other members can also be assigned the role of *Administrator*. Administrators have all the rights to the workspace and all permissions to the contents in the workspace.

- Member: Users with this role have the permissions to view, edit, and delete contents in the workspace.

### Information

The *Administrator* role cannot be edited or deleted.

You can also set authorization options for entries that were created in a workspace. For more information, refer to the [ELO Java Client](#) documentation.

## Overview of functions

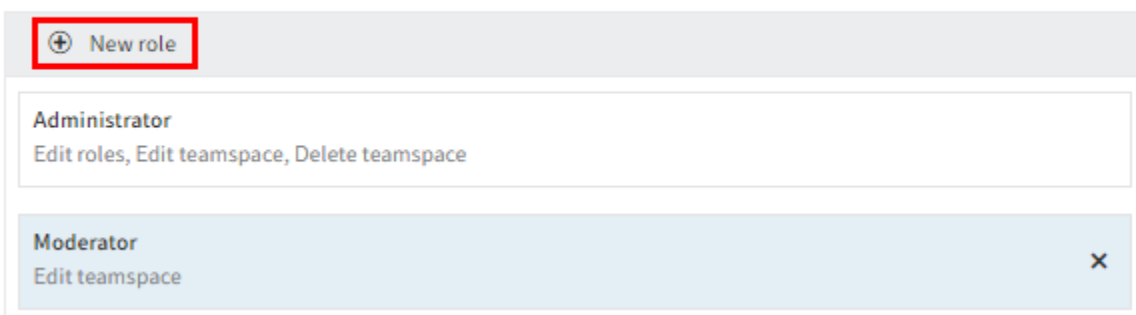
- New role: Add a new role to the workspace. See the following section for additional information on this.
- Roles: Selecting one of the existing roles lets you see the role's settings and edit them if you have the rights and permissions (main administrator).
- Default for new members: Select which role is set as standard for new members.

## New role

### Information


Only the main administrator can create and edit roles.

#### Roles




1. Select *New role*.


Role


 **New role**
✕

**Basic data**

Label \*

Translation variable  


Name  

**Special workspace rights** 

☐ Edit workspace

☐ Edit roles

☐ Delete workspace

**Default permissions for contents in the workspace** 

☒ View (R)

☒ Change metadata (W)

☒ Delete (D)

☒ Edit (E)

☒ Edit list (L)

☐ Set permissions (P)

The *Role* dialog box opens.

2. Enter a technical name in the *Identifier* field.
3. Enter a translation variable into the *Translation variable* field.
4. Enter the display text of the translation variable into the *Name* field.
5. Select *Save* (floppy disk icon).

Alternative: Select an existing translation variable with the *List* button (list icon).

6. Select which rights and permissions a user with this role should receive.

You can assign the following special workspace rights:

- Edit workspace: Users with this right can use the *Edit workspace* function to make changes to a workspace. They can also change the roles assigned to members in the workspace and add new members.
- Edit roles: Users with this right can edit the roles in the workspace.
- Delete workspace: Users with this right can use the *Edit workspace* function to delete a workspace.

You can grant the following default permissions for contents in a workspace:

- View (R): Users have read access to the entry. They cannot modify the entry.
- Change metadata (W): Users can edit the metadata of the entry.
- Delete (D): Users can delete the entry.
- Edit (E) (documents only): Users can edit the selected entry. This means that they can change the working version and upload a new version.
- Edit list (L) (folders only): Users can change the contents of the folder. For example, you can create documents in this folder or move or remove documents from the folder.
- Set permissions (P): Users can change the permissions for the selected folder.

The current workspace rights and permissions only take effect if the user has the corresponding user rights.

#### 7. Select *Save workspace type*.

The workspace type is saved. The new role can now be used for new workspaces. Existing workspaces with this workspace type do not take on the role.