Configuration and administration

ELO Administration Console

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ELO Administration Console

Introduction

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Please note

We have made every effort to supply product documentation that is as accurate as possible. However, as we are continuously developing the ELO Administration Console, the status of the program changes very quickly. For this reason, there may be minor discrepancies between the descriptions and images in the manual and in the program. We ask for your understanding if this occurs.

Basics

This chapter explains some of the basics in the ELO Administration Console.

System requirements

You will find more information related to the system requirements in the *ELO system requirements* documentation.
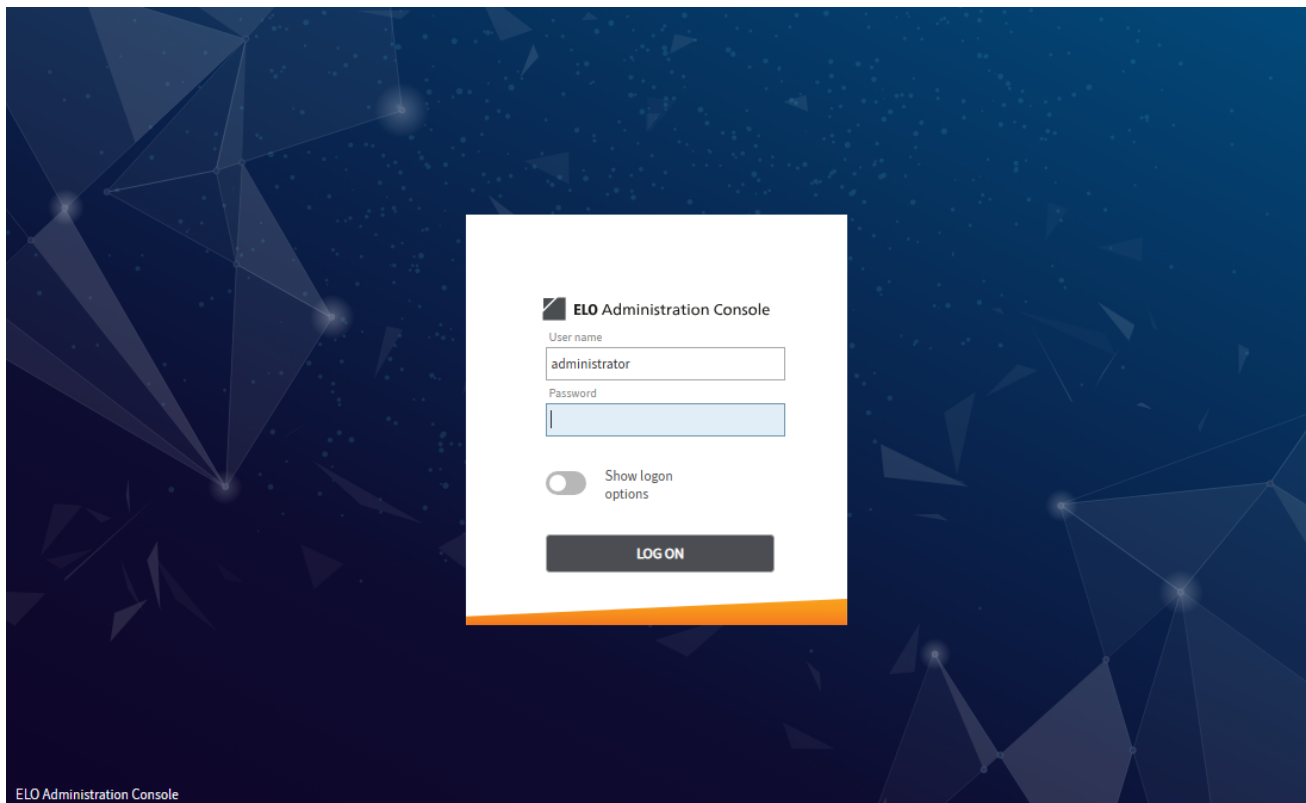
> **Please note**
>
> The version of the ELO Administration Console must be compatible with the corresponding ELO Indexserver. Note the information in the ELO Server Setup.

Installation

You can install the ELO Administration Console via the ELO server setup program.

Refer to the the *ELO Server* manual for more information.

Start and logon

To start the ELO Administration Console, enter the URL in the browser as follows:

```
http://<ELO server with installed ELOac>:<Port>/AdminConsole/
```
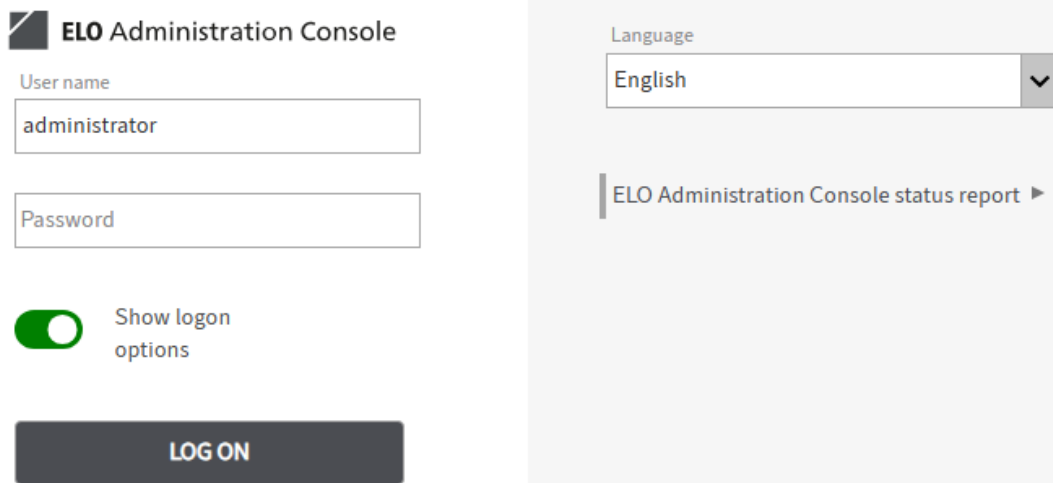
Example

```
http://eloserver:9080/AdminConsole/
```

Enter your user data to open the ELO Administration Console.

User name: Enter your user name here.

Password: Enter your user password here.

Show logon options: If the *Show logon options* button is enabled, you will see additional logon options.

The ELO Administration Console remembers whether the logon options were enabled or disabled and loads the corresponding state the next time you start the program.

Language: Select the language of the program interface here.

ELO Administration Console status report: View the ELO Administration Console status report.

Log on: Sign in with *Log on*.

The menu area

The home screen of the ELO Administration Console consists of the menu area.

ELO Administration Console Repository1 *Browse* 🔍 ⚙ 🖥 ❓ ↪

> Packages

> Proxy

> Servers

> System settings

> Maintenance

> Server modules

> System information

> Clients

> LDAP

The upper section of the menu area, the menu bar, contains the following menu items:

- ELO Administration Console `<repository name>`: Click this to open the settings for the system, maintenance, server modules, system information, and the clients.
- Browse: Searches the settings and options in the ELO Administration Console.
- Configuration: You can edit the configuration here.
- Information about the repository and the ELO Administration Console: This is where you can edit the settings for the current repository and the program.
- Help: Open the help page.
- Log off: Log off from the program.

The menu items *Configuration*, *Information about the repository and the ELO Administration Console*, and *Log off* are explained in more detail in the following sections of this chapter.

Below the header, you see the different areas of the ELO Administration Console, which are organized into the following groups:

- Packages
- Proxy
- Servers
- System settings
- Maintenance
- Server modules
- System information
- Other menu items

You can find more information about the different areas of the ELO Administration Console in the following chapters.

Configuration

In the *Configuration* section, you can define basic settings as well as the layout and behavior of the ELO Administration Console.

Change setting

1. Select the respective setting to make changes.

The setting switches to edit mode.

2. Open the drop-down menu.

3. Select the required setting.

4. Click *Save* (green check mark) to confirm your changes.

The new setting is applied.

ELO Administration Console home screen options

Menu item display settings: Specify whether you want to display a description next to the menu items or just the title.

Behavior when a menu title is clicked: Specify whether you want the page to open in the same or in a new window when you select the menu title.

Behavior when a menu icon is clicked: Specify whether you want the page to open in the same or in a new window when you select the menu icon.

ELOas configuration

ELOas configuration		
GUID of ELOas Base folder	(F6C173D7-3F71-4559-91E5-4886139B12CF)	The ELOas Base folder is defined as the default. This folder is also used if the field remains empty. You can enter an alternative GUID if you want to use a different folder for your ELOas rules.
Save rules as	Text file	Save ELOas rules created with the ELO Administration Console as extra text to an empty entry or as a text file in ELO.
Temporary directory for text files	E:\ELO\EN\\temp\ELO-EN-2	Enter the directory path you want to save text files in when checking out. This is only relevant if you save ELOas rules as text files.

GUID of ELOas Base folder: The ELOas Base folder is defined as the default. This folder is also used if the field is left blank. You can enter an alternative GUID if you want to use a different folder for your ELOas rules.

Save rules as: Save ELOas rules created with the ELO Administration Console as extra text to an empty entry or as a text file in ELO.

Temporary directory for text files: Enter the directory path you want to save text files in when checking out. This is only relevant if you save ELOas rules as text files.

Visibility of menu items on the home screen

Menu item	Visible
Packages	
Package administration	☑
Proxy	
ELO Flows configuration	☑
ELO App Manager	☑
ELO form designer	☑
ELO Web Client configuration	☑

Under *Visibility of menu items on the start page*, you determine which menu items are available in the ELO Administration Console. Enable or disable the various options by selecting the check boxes.

Save menu as XML file (diskette icon): Select the diskette icon to create the XML file *menu.xml*, which is stored on the server in the directory `...\config\AdminConsole\<name of instance>\`. ELO stores the settings for the menu items of the ELO Administration Console in the *menu.xml* file. The file can be edited manually and is loaded when you restart the ELO Administration Console.

Manage profiles

	Profile name	Indexserver URL	Version number
▶	Repository 🏠	http://[____]:8090/ix-Repository/ix	23.[____]
▶	Repository	https://[____]:8093/ix-Repository/ix	23.[____]
	2 known Indexservers		

You can edit the settings for the current profile here.

1. Select the entry for the current profile in the list of profiles.

   The program switches to edit mode. You can change the settings for the profile and the ELO Indexserver in the input fields.

   Profile name: Edit the name of the profile in the *Profile name* field.

   Indexserver URL: Edit the Indexserver URL of the profile in the *Indexserver URL* field.

   Hide during logon: To hide the profile when logging on to the ELO Administration Console, enable the *Hide during logon* option.

   Proxy redirect logic: If you access the ELO Administration Console from the Apache Tomcat Manager page, you can use the redirect logic to select which ELO Indexserver you want to connect to. You can change the default behavior with the *Proxy redirect logic* field.

   The following values apply:

   - -1 = Redirect is not allowed.

   - 0 = Redirect is allowed (default).

   - 1 and higher = Redirect is allowed. The higher the number, the lower the redirect priority.

   Repository GUID: The *Repository GUID* field contains the GUID of the repository. This is also the GUID of the top level in the repository.

2. Save the changes.

   Alternative: Select *Delete* to delete a profile.

   Information

   The *Delete* button does not delete the repository. It only deletes the profile in the ELO Administration Console.

Information about the repository and the ELO Administration Console

The *Information about the repository and the ELO Administration Console* button ("i" icon) takes you to the *Information about the current user and repository* page. This page contains menu items with information about the current user and the active repository.

The information includes the *user name*, the *Indexserver URL*, the *version number* of the ELO Indexserver, the *language*, the *session ID*, and the ELO Administration Console *version*.

Logon activity in the ELO Administration Console: The *Logon activity in the ELO Administration Console* area contains information about which users have logged on to the ELO Administration Console and at which time.

Click *OK* to leave the page and return to the menu.

Log off
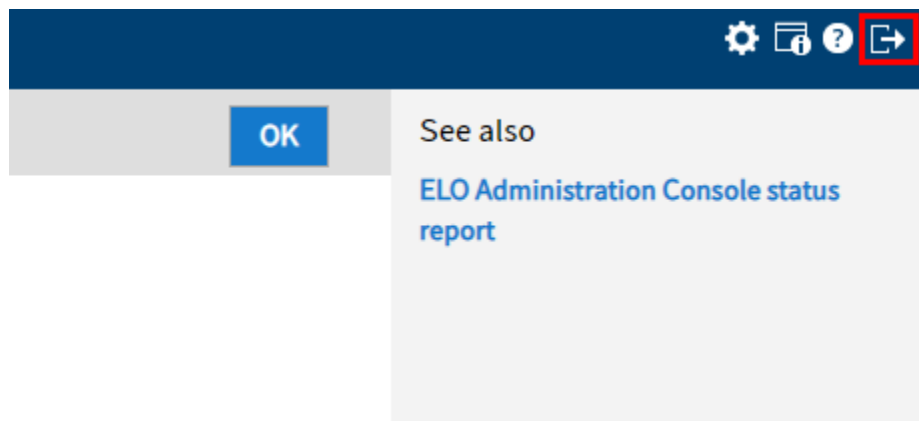
- Click *Logout* (door icon) to log out of the ELO Administration Console.

  The dialog to log on to the ELO Administration Console appears again.

ELO packages

Packages allow you to create and edit related configurations.

ELO packages can contain configurations for the following areas:

- Metadata forms, aspects, and fields (gen. 2)
- Forms (gen. 2)
- Groups
- ELO Teamspaces
- ELO Workspaces
- ELO Flows
- Translations
- Font colors

For more information, refer to the *ELO packages* documentation.

Proxy

In the *Proxy* area, you can open the *ELO Flows configuration*, the *ELO App Manager*, the *ELO form designer*, the *ELO Web Client configuration*, and *ELO Smart Input*.

ELO Flows configuration

In the *ELO Flows configuration* area, you can create, edit, and manage flows.

ELO Flows is an ELO module for easily implementing automation and integration tasks.
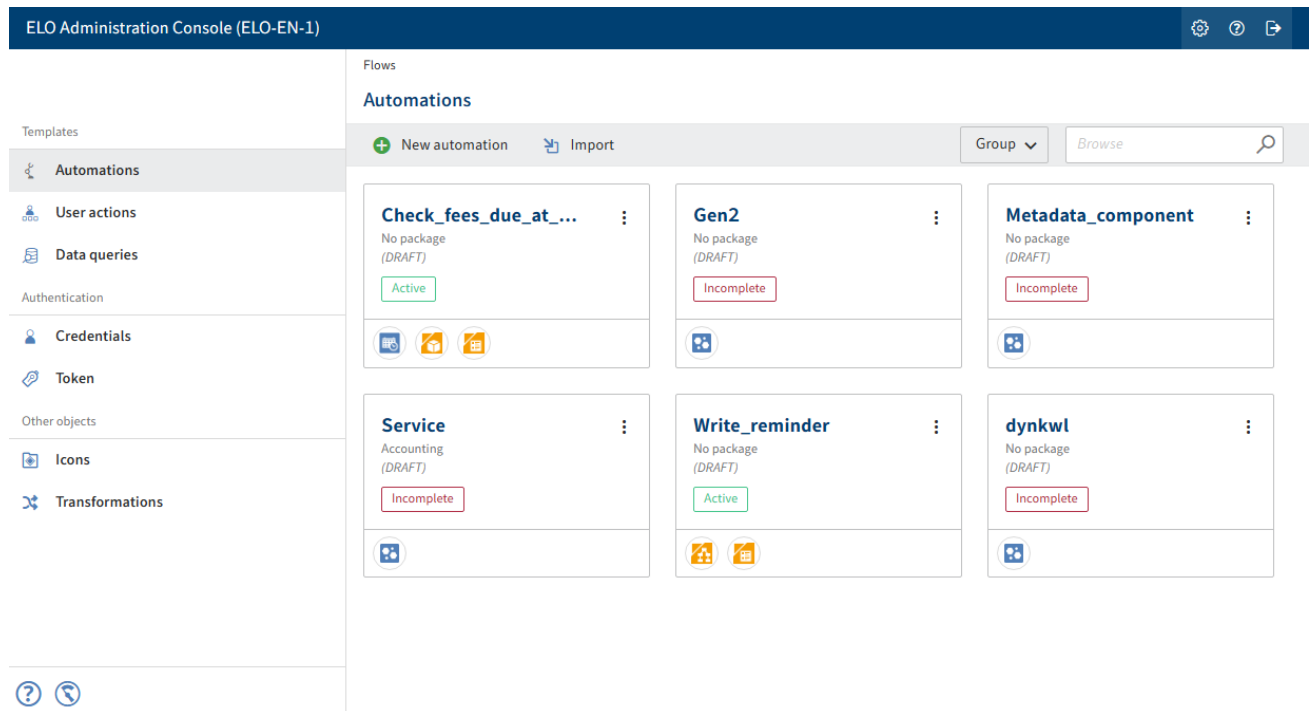
For more information, refer to the *ELO Flows* documentation.

ELO App Manager

In the *ELO App Manager* area, you can manage the ELO Apps from ELO Solutions and ELO integrations, for example.

You also have the ability to develop and control your own apps.

For more information, refer to the *ELO Apps API Documentation* (only available in English). This documentation must be downloaded and installed separately. You can find the *ELOwf API Doc* ZIP package on the ELO SupportWeb under *<Version> > ELO Web Forms Services (ELOwf) > Downloads*. You can find an installation guide in the ZIP package in the *Readme.txt* file.

You can find an overview of the URLs to access the documentation in the *ELO workflow* documentation under *Advanced functions > Events and global functions*.

Form designer

In the *Form designer* area, you can create, edit, and manage forms and templates for the form-based workflow.

You will find more information on how to use forms under *Form workflow > The form designer* in the *ELO workflow* documentation.

ELO Web Client configuration

From here, you automatically switch to the configuration section of the ELO Web Client.

Condition: The ELO Web Client must be installed and functioning correctly for this option to be available.

You will find more information on the ELO Web Client and its configuration in the *ELO Web Client* and *ELO Web Client administration* documentation.

ELO Smart Input

In the *ELO Smart Input* area, you perform the settings for the server module *ELO Smart Input*. You may need to log on to ELO Smart Input.

> **Information**
>
> The *ELO Smart Input* area is only displayed if you have installed the module.

ELO Smart Input analyzes the full text of a document and extracts data from it, such as addresses, sums, or e-mail addresses. Users receive suggestions for automatically detected data, which they can apply to the metadata.

ELO Smart Input is based on an incoming and target folder principle.

1. The incoming folder is where you save documents that have not yet been assigned metadata.

2. Use ELO Smart Input to enter the metadata.

3. The documents tagged with metadata are moved to a specified target folder or a folder created dynamically via the metadata form.

ELO Smart Input recognizes the following patterns by default:

- Amounts (net, VAT, gross)
- Addresses
- IBAN
- Date
- E-mail addresses
- Telephone numbers
- VAT ID
- Custom regular expressions

For more information, refer to the *ELO Smart Input* documentation.

Servers

In the *Servers* area, you can open the settings for *ELO Azure Administration*.

> **Information**
>
> This area is only available if ELO Azure Administration was installed using the ELO Server Setup.

ELO Azure Administration

ELO Azure Administration is a service for managing app registrations for Microsoft Azure.

The following ELO apps can currently be registered via ELO Azure Administration:

- ELO Bot for Microsoft Teams
- ELOauth

For more information, refer to the ELO Azure Administration documentation:

System settings

This chapter describes the settings for the *Group manager*, *User manager*, *Organizational units*, *Metadata forms and fields*, *Field templates*, *Keyword lists*, *Entry types*, *Document paths*, *Default document paths*, *Encryption keys*, *Manage URLs*, *Stamps*, *Respository properties*, and *Font colors*.

Group manager

The *Group manager* section is where you can manage users. The rights for groups are defined here.

You will find more under *Groups* in the *User management* documentation.

You will find more information on groups in ELO packages under *Users and groups* in the *ELO packages* documentation.

User manager

The *User manager* section is where you can manage users. The rights for users are defined here.

You will find more under *Users* in the *User management* documentation.

Organizational units

In this menu item, you can manage organizational units.

Organizational units provide a way to classify users.

You will find more under *Organizational units* in the *User management* documentation.

Metadata forms and fields (gen. 1)

Description: You can create and manage metadata forms (gen. 1) in the *Metadata forms and fields* area.

> **Information**
>
> You need to create the field templates required for the metadata forms before you create the metadata form. You can use field templates in different metadata forms.

For more information, refer to the *Metadata forms and fields* documentation.

You will find information on metadata forms and aspects (gen. 2) under *ELO packages* in the *Metadata* documentation.

Field templates (gen. 1)

You can define templates for fields (gen. 1) in the *Field templates* area. These templates can be used to create metadata forms in the *Metadata forms and fields* area.

You will find more information under *Field templates* in the *Metadata forms and fields* documentation.

You will find information on metadata forms and aspects (gen. 2) under *ELO packages* in the *Metadata* documentation.

Keyword lists

Create new keyword lists and edit existing keyword lists in the *Keyword lists* area.

Keyword lists help you enter and standardize metadata.

You will find more information under *Keyword lists* in the *Metadata forms and fields* documentation.

You will find more information under *ELO packages > Keyword lists* in the *Metadata* documentation.

Entry types

By assigning entry types, you can see what type of entry you are dealing with at a glance. The icons that are used for this purpose can be customized.

Entry types   Save   Cancel

+ Download icon set as ZIP file   Upload icon set as ZIP file   ⓘ

∨ Icons and definitions for folders

ID	Icon	Definitions		16 px	32 px	64 px	128 px	
9999		Repository		✓	✓	✓	✓	✕
1		Cabinet		✓	✓	✓	✓	✕
2		Folder		✓	✓	✓	✓	✕
3		Tab		✓	✓	✓	✓	✕
4		Level 4		✓	✓	✓	✓	✕
5		Level 5		✓	✓	✓	✓	✕
6		Level 6		✓	✓	✓	✓	✕
7		Red folder		✓	✓	✓	✓	✕
8		Yellow folder		✓	✓	✓	✓	✕
9		Green folder		✓	✓	✓	✓	✕
10		Blue folder		✓	✓	✓	✓	✕
11		Red tab		✓	✓	✓	✓	✕
12		Yellow tab		✓	✓	✓	✓	✕
13		Green tab		✓	✓	✓	✓	✕

For more information, refer to the *Entry types* section of the *System administration* documentation.

Document paths

ELO manages storage media (physical storage) using document paths. In the *Document paths* area of the ELO Administration Console, you can set up new media, make moved media accessible again, or check the free storage space on a medium. The document path specifies where the documents are stored physically.

You will find more information under *ELO Server > Document paths* in the *Repository & documents* documentation.

Default document paths

In the *Default document paths* area, you specify which paths to use as document paths or restore paths.

You will find more information under *ELO Server > Default document paths* in the *Repository & documents* documentation.

Encryption keys

The encryption keys used in ELO are managed in the *Encryption keys* area. Documents encrypted with these keys are encrypted and assigned a password.

You will find more information under *Encryption keys* in the *System administration* documentation.

Manage URLs

In the *Manage URLs* area, you enter the URLs for different ELO modules.

You will find more information under *ELO Server > Manage URLs* in the *Repository & documents* documentation.

Stamps

You can use stamps on documents in ELO just as you would on paper documents. In the *Stamps* area, you can create new stamps, or edit and delete existing stamps.

The stamps are available to users in the viewer pane in the ELO Java Client.

You will find more information under *Stamps* in the *System administration* documentation.

Repository properties

In the *Repository properties* area, you can change the display name for the repository.

The display name is used in different places. For example, as the name of the top repository level. Similarly, it is used as the name of the main tile for the *Repository* work area in the clients.
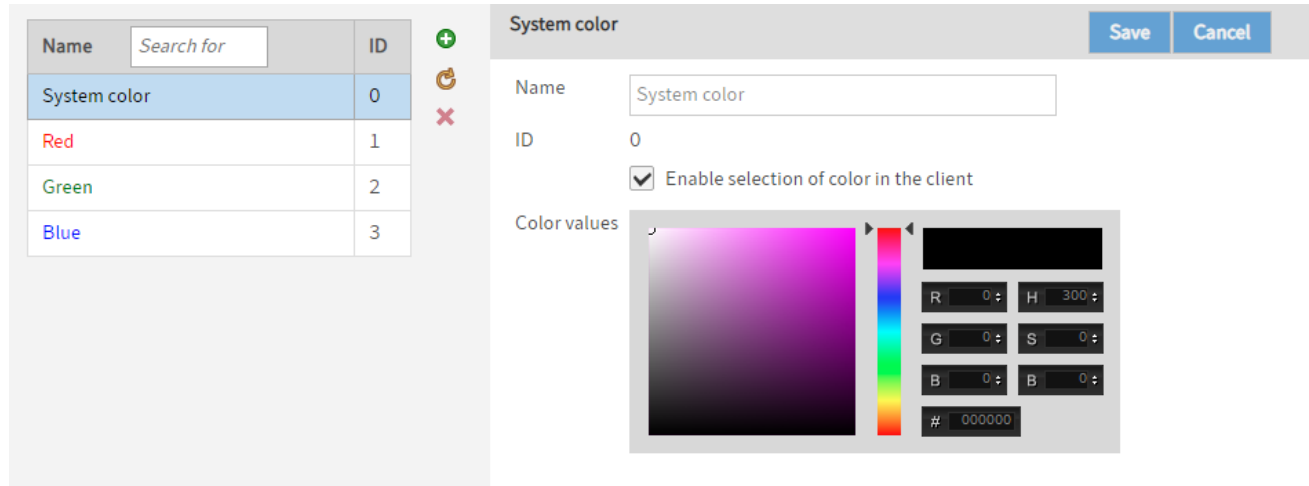
> **Please note**
>
> Altering the display name does not change the actual name of the repository.

You will find more information under *Repository properties* in the *System administration* documentation.

Font colors

The colors used to display entries are defined in the *Font colors* area. You can assign a separate color for each document and folder type.

You will find more information under *Font colors* in the *System administration* documentation.

You will find information about font colors in ELO under *ELO packages > Font colors* in the *Other topics* documentation.

Maintenance

This chapter provides descriptions and explanations of the settings for the *Administration mode*, *Report options*, *Delete and remove*, *Backup tasks*, *Password rules*, and *Move document files*.

Administration mode

Administration mode can be used to restrict client access to ELO, e.g. during system maintenance.

Administration mode is currently disabled.

👤 Enable administration mode

ⓘ When administration mode is enabled, users without main administrator rights will not be able to log on to the repository.

Administration mode is active for all repositories that are accessed by the same ELO Access Manager.

Information

Only administrators can access the ELO clients! Administration mode is active for all repositories that are accessed by the same ELO Access Manager.

Report options

In the *Report options*, administrators can define the settings for log files and logged activities in ELO.

> **Information**
>
> You create a report in the ELO Java Client with the standard configuration via *Organize > Properties > Report for entry*.

You will find more information under *ELO Server > Report options* in the *Maintenance and monitoring* documentation.

Delete report entries

The *Delete report entries* function enables you to delete report entries up to a specific date.

You will find more information under *ELO Server > Delete report entries* in the *Maintenance and monitoring* documentation.

Delete and remove

The *Delete and remove* area contains the settings for deleting and removing documents from the repository.

You will find more information under *Delete and remove* in the *System administration* documentation.

Backup tasks

In the *Backup tasks* area, you define the settings for backups.

You will find more information under *ELO Server > Backup* in the *Repository & documents* documentation.

Password rules

In the *Password rules* area, you define the password security settings.

You will find more under *Password rules* in the *User management* documentation.

Move document files

In the *Move document files* area, you can move files, file versions, attachments, and/or attachment versions to a different document path. The repository structure remains the same.

Move document files   Restore default settings   See also

                                                                                          Document paths

Source path   All paths   ⌄

Target path   ⌄

Filing date range

from   ▦   to   ▦

Count   Move

You will find more information under *ELO Server > Move document files* in the *Repository & documents* documentation.

Server modules

The *Server modules* area contains the areas *ELO Automation Services*, *Backup profiles*, *Create password*, and *ELO Transport*.

ELO Automation Services

ELO Automation Services are used to automate tasks within ELO. This area of the ELO Administration Console is where you enter rulesets for ELO Automation Services.

For more information, refer to the *ELO Automation Services* documentation.

Backup profiles

In the *Backup profiles* area, you enter the settings for the backup profiles.

> **Please note**
>
> Before you can create a backup profile, you must have defined a document path. Once you have done so, the document path will be available in the backup profiles.

You will find more information under *ELO Server > Backup service* in the *Repository & documents* documentation.

Create password

In the *Create password* area, you can create encrypted/encoded passwords for ELO.

You will find more information under *ELO Server > Passwords* in the *Repository & documents* documentation.

ELO Transport

The *ELO Transport* area is used to create transport files. A transport file can contain information about ELO users, font colors, keyword lists, metadata forms, folders, and documents. The information is stored in a file that can be imported into an ELO repository.

You will find more information under *ELO Server > ELO Transport* in the *Update and migration* documentation.

System information

These functions help you manage users and the system. This chapter provides information about the *Server information*, *Users in system*, *Statistics*, *License overview*, *License report*, and *Test checksum* areas.

Server information

The *Server information* area contains an overview of the server settings.

Users in system

Under the *Users in system* menu item, you will find an overview of the users currently logged on to the system.

Users in system | Reset filter

No.	User ◇	System ◇	Application ◇	Version ◇	Valid until ◇	Ticket ◇
1	Administrator	IX	ELO Administration Console	23.	27.06.2023 13:44	508A1F1730B1A78D.
2	Anderson		ELO Java Client	21.	27.06.2023 13:44	CAFC0E30383A465E.
3	Cole		ELO Desktop Client	23.	27.06.2023 13:43	0A4CBEDAC0AA45A3.
4	Administrator		ELO Workflow Services	23.	27.06.2023 13:43	97E9C3F03FD1606E.
5	Santini		ELO Web Client	23.	27.06.2023 13:43	0EDA2B8C8E3A7694.
6	Edwards	IX	ELO Administration Console	23.	27.06.2023 13:43	5D440D7658101FCA.
7	Administrator	IX	ConfigEditor	0.0.0	27.06.2023 13:41	A3CE67AFBDAA74BA.
8	ELO Service [ELO Service]	IX	ELO FT Plugin	23.	27.06.2023 13:41	64005FD5009C63B7.
9	Edwards	IX	ELO Administration Console	23.	27.06.2023 13:41	8C591DF9823C862E.
10	ELO Service	ELO Workflow Services	ELO Workflow Services	23.	27.06.2023 13:40	C5F982E3A61EDA24.
11	Byte	IX	ELO Workflow Services	23.	27.06.2023 13:40	5AE28925E0F01863.

Information

User accounts for various services and modules are shown here.

Statistics

Description: This contains an overview of the IDs assigned in the repository.

Statistics

Name	Highest ID currently assigned
Entry ID	2798
Document ID	2877

License overview

The *License overview* area provides an overview of the license usage.

License overview

Name	Value
Customer name	presentation license EU (838) - ELO Digital Office GmbH
Other name	Not for resale
Valid until	31.03.2024
Product	23e
Number of full clients	20
(reserved)	20
Page volume ERP Data Transfer module	100
Number of ELO Workflow Client for SAP® ERP licenses	20
(reserved)	0
Number of Indexserver licenses	20
Number of Web Client licenses	20
Number of ELOxc licenses	20
Number of external Teamroom Client licenses	20

See also

Users in system

Server information

Statistics

License report

You will find more information under *ELO Server > License information* in the *Maintenance and monitoring* documentation.

License report

The *License report* page provides you with a report about access and used licenses in ELO as well as information about the users who have performed write actions via the full clients and via the Indexserver.

License report		Refresh

Licenses and access	Number
Total number of licenses for access via the full client	20
Total number of licenses for access via the Indexserver	20
Total number of licenses for access via the Web Client	20
Active users with full client access	2
Active users with Indexserver access	1
Active users with Web Client access	0
Currently locked users with access within the licensing period	1
Comparison	**Number**
Available licenses minus write actions in the full client	18
Available licenses minus write actions on the Indexserver	19
Available licenses minus write actions in the Web Client	20
Users and groups	**Number**
Existing groups	19
Existing users	13
Locked users	0
Existing users and groups	32

See also

License overview

Users in system

Server information

Administration folder

Statistics

↓ Download report

You will find more information under *ELO Server > License information* in the *Maintenance and monitoring* documentation.

Test checksums

In the *Test checksums* area, you can test the integrity of one or more documents.

Test checksums

Document IDs to check

1

2877

☑ Full report

Last document ID checked   0

Number of incorrect checksums   0

Number of correct checksums   0

Number of failed access requests 0

[Check] [Cancel]

See also

License overview

Users in system

Server information

Administration folder

Statistics

License report

You will find more information under *ELO Server > Test checksum* in the *Maintenance and monitoring* documentation.

Other menu items

This page provides a summary of the *Clients*, *Others*, *LDAP*, and *ClientInfos* areas.

Clients/ELO for Mobile Devices

In the *ELO for Mobile Devices* area, you can modify the available functions in the *ELO app (Android)* and *ELO app (iOS)*. You can grant or restrict specific users or groups access to work areas and functions.

Settings for: You can see who the settings apply for next to *Settings for*.

Select user: Select *Select user* to open the *Select user or group* dialog box. In the *Select user or group* dialog box, you can select the user or option group that you want to edit the settings for.

> **Information**
>
> To edit the settings for all users (global), select the *Everyone* group.

Work areas: In the *Work areas* table, you can enable or disable work areas for the selected user/ group.

Functions: In the *Functions* table, you can enable or disable functions for the selected user/group.

Set by: In the *Set by* column, you can see whether a setting has been assigned to an individual user or through an option group.

For more information, refer to the *ELO mobile apps* documentation.
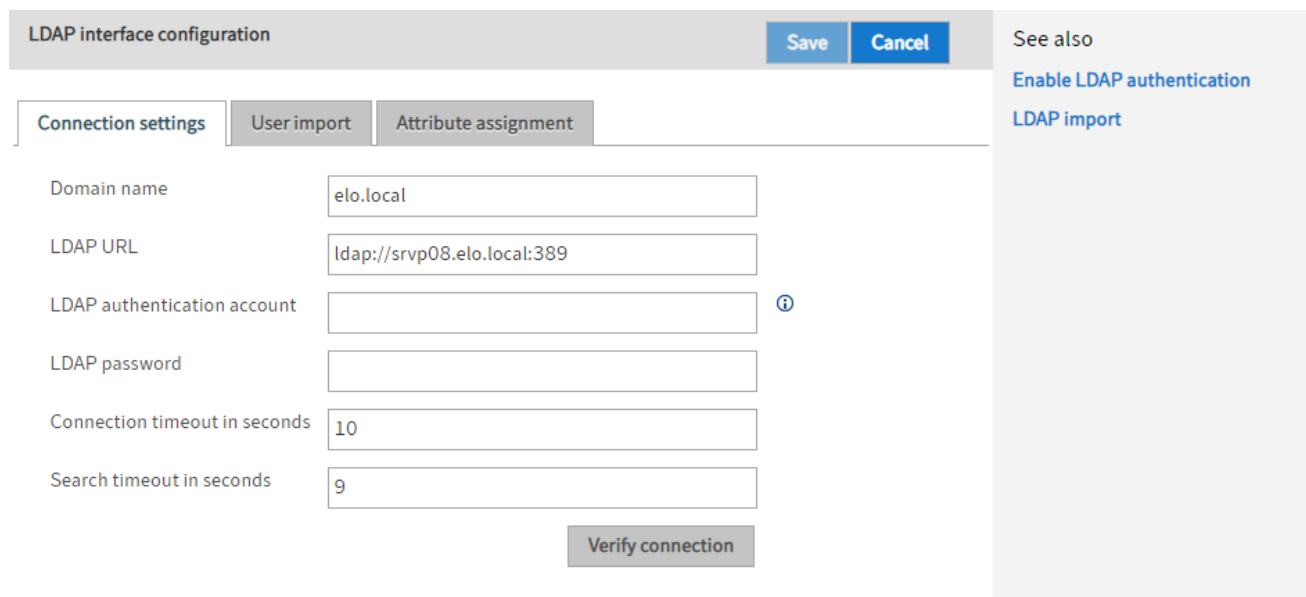
Others/Block access

Under *Block access*, you can restrict access to ELO based on membership of a selected group.

You will find more under *Block access* in the *User management* documentation.

LDAP

The following menu items are available in the *LDAP* area:

- LDAP import
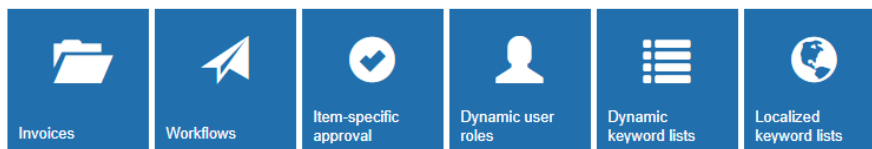- LDAP interface configuration
- Enable LDAP authentication

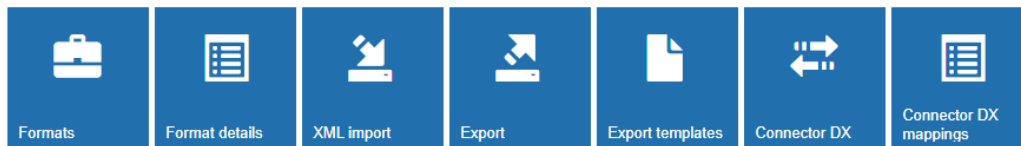You will find more under *LDAP* in the *User management* documentation.

ClientInfos

The *ClientInfos* menu area is visible if you have installed ELO Business Solutions.
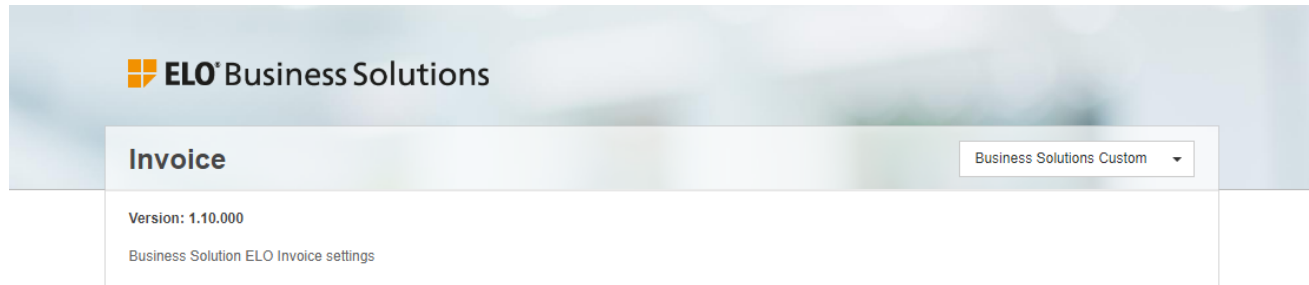
Depending on what you select, you will see options for the respective ELO Business Solution.

For detailed information, refer to the documentation for the respective ELO Business Solution.