ELO packages

ELO Teamspaces

2

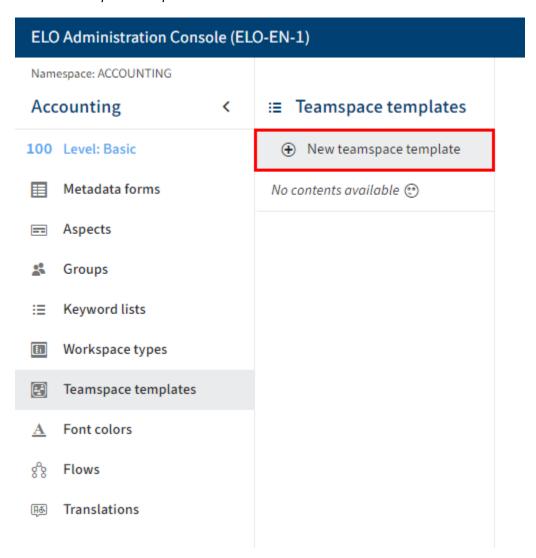
Table of contents

Teamspaces	3
Create teamspace template	3
Configure teamspace template	5

Teamspaces

Create teamspace template

- 1. In the ELO Administration Console, select the package where you would like to create the teamspace template.
- 2. Select *Teamspace templates*.



3. In the *Teamspace templates* dialog box, select the *New teamspace template* button.

The Configuration area for the new teamspace template opens.

Information

If you select an existing teamspace template, you can also configure it in the *Teamspace template* dialog box.

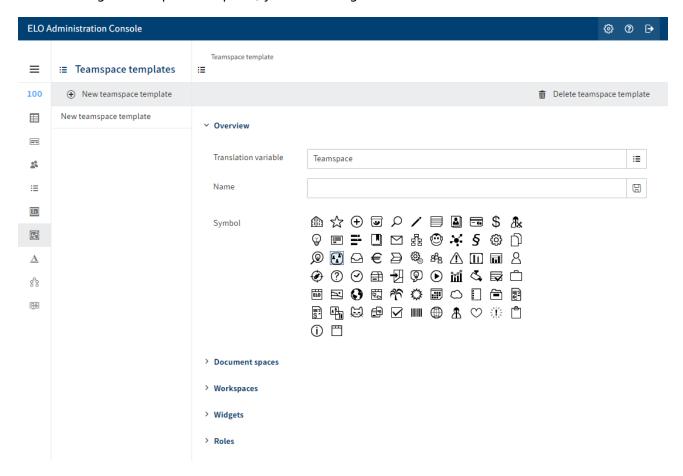
Once you are finished with configuration, select *Save template* to save it.

A new teamspace template was created.

5 ELO packages

Configure teamspace template

After creating a teamspace template, you can configure them.



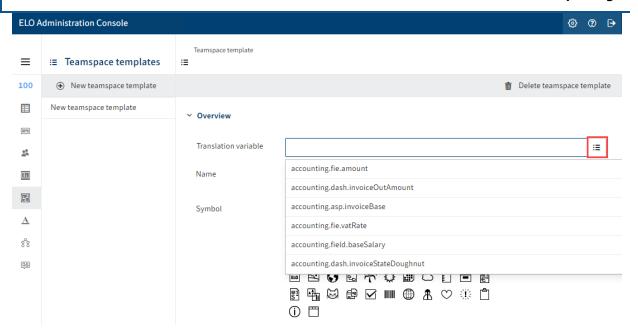
The *Teamspace template* dialog box offers the following actions:

- Enter basic data for the teamspace template
- Define <u>document spaces</u>
- Create workspaces
- Add <u>widgets</u>
- Define roles
- Delete teamspace template

Enter basic data for the teamspace template

Basic data for the teamspace template is entered in the *Overview* area.

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



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.

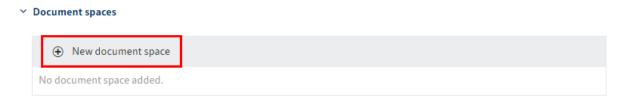
- 4. Select the symbol to display in the tile in your client for the *Teamspace* function with this template.
- 5. Select Save template.

The teamspace template is saved.

Define document spaces

You can create document spaces in your teamspace template.

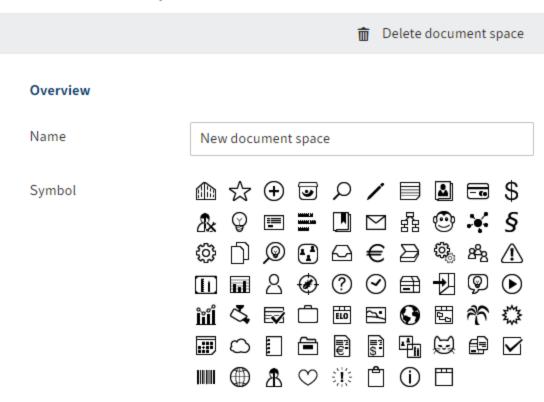
1. Select New document space.



The New document space dialog box appears.

Document space

New document space



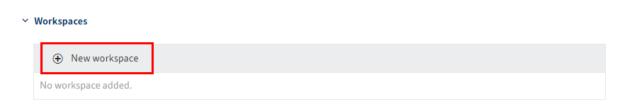
- 2. Enter a name for the document space.
- 3. Select a symbol.
- 4. Select Save template.

The teamspace template is saved. You created a new document space.

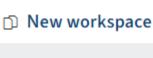
Create workspaces

You can create new workspace instances in your teamspace template based on existing workspace types.

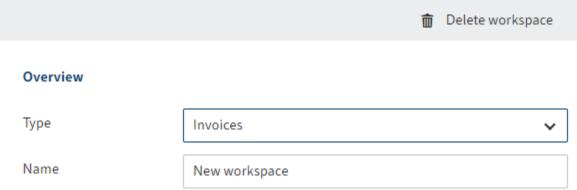
1. Select New workspace.



The New workspace dialog box appears.



Workspace



- 2. Select a workspace type in the *Type* field via the drop-down menu in the *New workspace* dialog box.
- 3. Enter a name for the workspace.
- 4. Select Save template.

The teamspace template is saved. You have added a new workspace to the teamspace.

Add widgets

You can integrate widgets in your teamspace. First, you must create a widget.

A widget is an ELO app. Refer to the *ELO apps API* documentation and their guides to learn how to create them. You can find them in the SupportWeb.

A special requirement when creating a widget for teamspaces is that during creation, you must enter the following in the app's manifest (manifest.json):

```
"widgets": [
{"type": "elo.widget.type.Teamspace"}
],
```

This entry is a list of widget types that this ELO app is available for.

Information

The type elo.widget.type.Teamspace is currently the only available type. It stands for the home screen of a teamspace.

Click the New widget button to integrate the widget.

Widgets



Define roles

In a teamspace, users have different roles with different associated rights and permissions. You can define roles in this area.

A teamspace contains four pre-defined roles with defined rights and permissions:

- Administrator: The creator of a teamspace is automatically assigned the role of
 Administrator. Other team members can also be assigned the role of Administrator.
 Administrators have all the rights to the teamspace and all permissions to the contents in the teamspace.
- Moderator: Users with this role have the right to edit the teamspace but not delete it. Like administrators, they have all the permissions to the contents of the teamspace.
- Member: Users with this role have the permissions to view, edit, and delete contents in the teamspace.
- Guest: Users with this role have permission to view the contents in the teamspace.

Information

The Administrator role cannot be edited or deleted.

Overview of functions

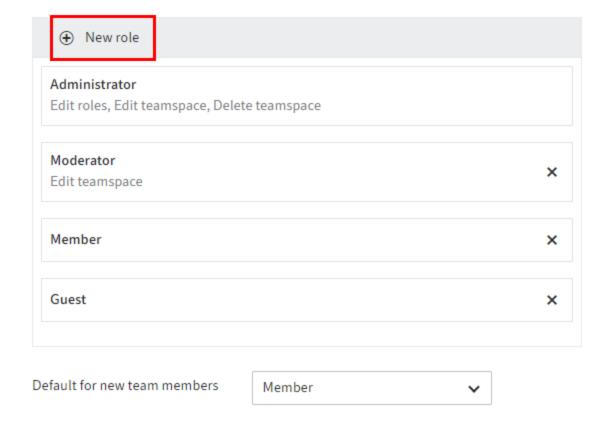
- New role: Add a role to the teamspace template. See the following section for additional information on this.
- Roles: Selecting one of the existing roles lets you see the role's settings and edit them if you have the rights and permissions (main administrator).
- Default for new team members: Select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

New role

1. Select New role.

10 ELO packages

→ Roles



The *Role* dialog box opens.

Role New role Basic data Label * New role Translation variable Е Name Special teamspace rights (1) Edit roles Edit teamspace Delete teamspace Default permissions for contents in the teamspace (1) ✓ View (R) ✓ Change metadata (W) Delete (D) Edit (E) Edit list (L) Set permissions (P)

- 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 grant the following special teamspace rights:

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

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

- 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 teamspace rights and permissions only take effect if the user has the corresponding user rights.

7. Click Save template.

The teamspace template is saved. The role can now be used for new teamspaces. Existing teamspaces with this teamspace template do not take on the role.