



Configuration and administration

System administration



Table of contents

General system settings	3
Repository properties	3
Administration folder	5
Font colors	10
Folders and documents	12
Entry types	12
Encryption keys	14
Delete and remove	16
Stamps	18
'Stamps' menu item	18
Add a text stamp	22
Add a new image stamp	24

General system settings

Repository properties

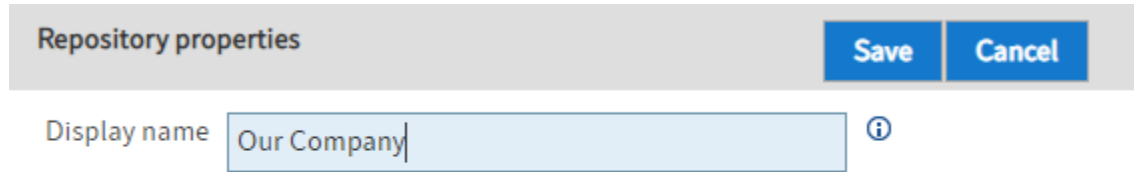


Fig.: 'Repository properties' menu item

Display name: 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.

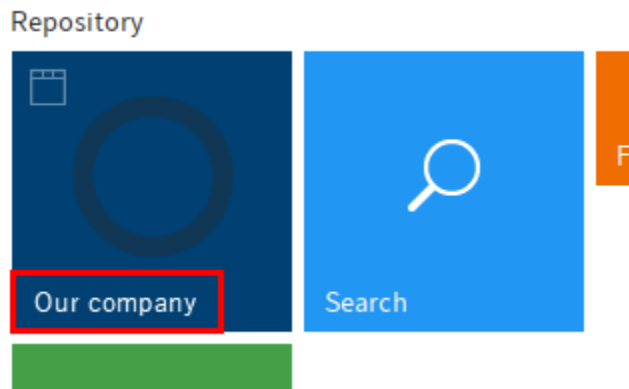


Fig.: Display name of the main repository tile in the client

Information

Changes to the display name do not take effect until you restart the client.

With the default settings, the name of the repository that was assigned in the setup is used.

Please note

The repository ID (previously: repository name) is not set via the *Display name*. These settings are made in the *ELO Replication* module.

Administration folder

The *Administration folder* area contains information about the Administration folder. The GUIDs of the child folders are shown here.

Information

Custom installations, such as for projects with ELO Business Solutions, can differ from the structures described here. If required, references to the various child folders in the Administration folder should also refer to additional information sources.





ELO Administration Console Repository						   	
Administration folder					Reset filter	See also License overview Users in system Server information Statistics License report	
Entry ID	Search for	GUID	Search for	Short name	Search for		
1305		(0017B087-27E9-173E-CAE1-04FF20F83638)		BMP			
653		(1C34ECE4-7B17-4F24-897C-7869A376323B)		Updater			
1307		(4295A8DC-AEEE-F7BE-953D-1AB94097B57A)		ICO			
655		(45CA3389-0494-43D7-9796-76B6EFE061E9)		Optimizer			
1308		(476C391B-36FC-61C2-604E-74371F52BAC3)		PNG			
1304		(7DB79D24-3913-4ED0-A6F1-89B4BE75A5A9)		Sord Type Icons			
1306		(8496C830-9D12-BC14-909C-7468B036CF92)		JPG			
654		(D8BD55BA-A6D1-4A52-8EB1-8D54C5882A47)		Re-indexer			

Fig.: 'Administration folder' menu item

Information

You may require the GUIDs to perform automatic tasks and manage the folders in scripts.

Reset filter: Click the *Reset filter* button to restore the default settings for the *Administration folder*.

Child folders

Various program and system settings and special user documents are stored in the child folders of the Administration folder. The child folders and their functions are explained below.

Information

The folders in ELO depend on the modules installed and the available licenses. It is possible that certain folders will not exist in the repository and that other folders, which are not described here, will exist as a result of project-specific settings.

Sord type icons

Contains the icons for the entry types in ELO in different formats. There is one child folder for each format. The following formats are available:

- BMP
- ICO
- JPG
- PNG

Administration

The parent folder for all folders listed here.

Replication Base

Starting point for replication assuming that this has been defined in the replication settings. Other settings are possible. You can find more information in the ELO Replication manual.

Java Client Scripting Base

Scripts for the ELO Java Client are stored in this folder.

IndexServer Scripting Base

Scripts for the ELO Indexserver are stored in this folder. It contains the following child folders:

- *_ALL*: File Indexserver scripts to be executed by all available ELO Indexservers to the *_ALL* folder.
- *<Server 1>*: Indexserver scripts to be executed by a specific server only can be filed to the folder bearing the name of the respective server.
- *<Server n>*: Additional Indexserver scripts for the respective ELO Indexserver.
- *Synchronize Search Indexer*: Configuration of Elasticsearch.

ELO Background Images

COLD background images for viewing COLD documents in MMF format.

HTML Templates

Templates for displaying metadata (HTML format)

Webclient Scripting Base

Scripts and associated files for the ELO Web Client are located in this folder. It is the filing location for scripts that are read and executed by the ELO Web Client when the program is started.

Information

The business partner or customer needs to transfer files to this folder manually via one of the clients.

You can find additional information on ELO Web Client scripts in the ELO Web Client manual.

ELOxc Base

The folder *ELOxc Base* contains the configuration settings for ELOxc EWS.

Users

The *Users* folder contains the child folders for the users.

There is one folder per user, which is created via a path according to the following convention:

Users\`<number range>`\<User>

Each user folder contains the following child folders:

- *Data*: This folder contains the user's profile data and (if available) the user's default index.
- *Personal area*: Personal documents are filed here.
- *Inbox*: Alternative to Intry. Unlike the Intry, documents added to the full text database are version-controlled, and archived.

Dropzone

The settings for ELO Dropzone are stored in the *Dropzone* folder. It contains the following child folders:

- *Global*: All global tiles are stored in this folder. These tiles are available for all users. The administrator can create multiple child folders and assign permissions in ELO so that different user groups can see them.
- *Store*: The tile definitions for the tile collection are saved to this folder (ELO Java Client only). The area folders are added below the Store folder. As in the Global folder, the administrator can define here which tile collections are visible to which user groups.
- *User.<User-ID>*: The personal tile definitions of each user are saved to this folder. In addition, the configuration is saved in the extra text of the user folder.

Localization

Translation files are stored in the *Localization* folder. It contains the following child folders:

-

custom: Localization of scripts

- *system*: Localization (e.g. of form elements) using properties files.

Fulltext Configuration

This folder is used for the configuration of the ELO Fulltext module. It contains the following child folders:

- *Re-Index Error*: This folder contains documents that caused errors during a re-index.
- *Thesaurus*: This folder contains the configuration files for the thesaurus and thesaurus files for the individual languages.
- *Update Errors*: This folder contains documents that caused errors while updating the index.

ELOapps

The *ELOapps* folder is where the configuration and database for the ELO apps are stored. It contains the following child folders:

- *AccountRecovery*: This folder is intended for cases where a user has forgotten their password or a user wants to register again. You can also define workflows for cases like these. The objects used for these workflows are stored in the *AccountRecovery* folder.
- *Apps*: This folder contains archived and installed ELO apps. These are created using the App Manager or can be installed when repositories are imported.
- *ClientInfos*: This folder contains data objects (ClientInfo objects) that describe when a website is to be displayed in the client. These are created using the App Manager.
- *Configuration*: The global configuration (in the extra text) is stored in this folder. It contains configuration files (JSON format), which can be read out for individual apps.
- *Icons*: This folder contains ICO image files. Depending on the naming convention, these are available in the apps or can be read as a tile image in the ELO Web Client.
- *Modules*: This folder contains archived and installed ELO modules. The ELO modules are created using the App Manager or can be installed when repositories are imported.

Workflow icons

This folder contains the icons for workflows.

ELOWf Base

This folder is used for storing the database and the configuration for ELOWf (forms and feed). It contains the following child folders:

- *Classes*: The CSS style files for displaying forms are stored in the extra text of the *Classes* folder. Users should also store their own CSS files in the *Classes* folder. These files are available in the form editor.
- *Configuration*: The extra text of the *Configuration* folder contains configuration data (folder paths, main language, etc.) for ELOWf. The *Configuration* folder also contains the document framework that serves as a basic structure for forms.
-

Feed\Script Locales: Information on localizing the feed for automatic script posts. You need to transfer files to this folder manually via one of the clients.

- *Forms*: The *Forms* folder contains all form templates.
- *Forms Custom*: The *Forms Custom* folder is for the ELO Business Solutions. This is where you store copies of ELO Business Solution (partial) forms that share the same name. You can then edit the copies. This way, your custom settings will be retained in the copies when you update the ELO Business Solution. If there are forms or partial forms in the *Forms Custom* folder, ELO always uses the settings for the copies instead of those for the original forms.
- *Images*: You need to file image documents that are used in files in the *Images* folder. References are allowed.
- *Preview*: [from 10.01] The folder is used for previewing forms. This folder must be empty and should not be modified.
- *Webapp*: You can store additional script and HTML documents for forms in the *Webapp* folder. These are files that can be embedded in forms. You need to transfer files to this folder manually via one of the clients.

ELOas Base

The *ELOas Base* folder contains the scripts and libraries for ELO Automation Services.

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.

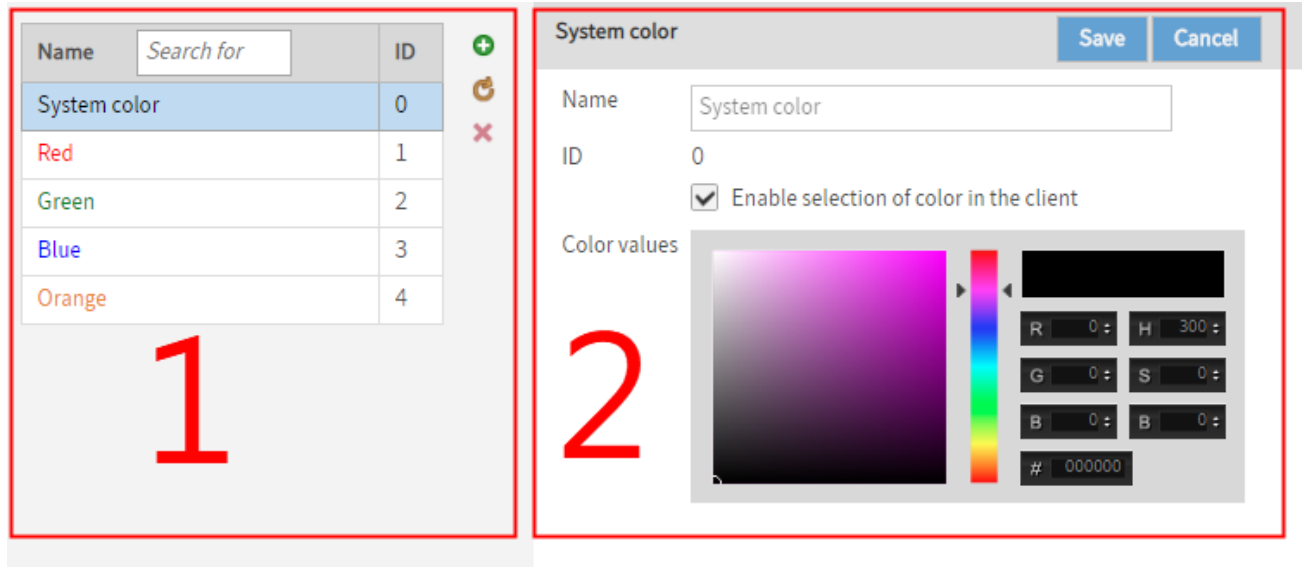


Fig.: 'Font colors' menu item

The *Font colors* area contains the following sections:

- 1 List of colors
- 2 Color settings

These are explained below.

1 List of colors

The *List of colors* area contains all the font colors that are available for the corresponding repository. Select a color to view or edit the corresponding settings.

Search for: You can search the list using the *Search for* field.

Add (green plus icon): Click the *Add* button to create a new font color.

Reload data from server (yellow circle arrow icon): Click the *Reload data from server* button to reload the *List of colors* area.

2 Color settings

In the *Color settings* area, you can edit the settings of the selected font color.

Name: You can edit the name of the font color in the *Name* field.

ID: The ID is assigned automatically by ELO.

Color values: The *Color values* area contains different options for editing the color.

- a) manual selection using the color field and color slider
- b) exact selection using RGB and HSB values
- c) exact selection using hexadecimal values

Folders and documents

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	
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	✓	✓	✓	✓	✗

Fig.: 'Entry types' menu item

Download icon set as ZIP file: Click the link *Download icon set as ZIP file* to download the settings and icons for the object types as a ZIP file. The settings are stored in the file `sordTypes.xml`. The individual icons are available in ICO format.

Information

Icons must exist in ICO file format. ICO files contain several different images that the system uses depending on the required resolution and color depth. The individual images must be saved in PNG format. The standard resolution for ELO applications is 16x16 pixels.

Upload edited ZIP file: Click the link *Upload edited ZIP file* to upload new settings and icons for the object types as a ZIP file. The modified settings and icons are available after you edit them.

Icons and definitions for folders

The *Icons and definitions for folders* area is where you define the icons for different levels and folder types in ELO.

Icons and definitions for documents

▼ Icons and definitions for documents












ID	Icon	Definitions	File extensions	16 px	32 px	64 px	128 px	
254		Document	*	✓	✓	✓	✓	
255		Word	doc, dot, rtf, docx, dotx	✓	✓	✓	✓	✗
256		Excel	xls, xla, xlsx, xlax	✓	✓	✓	✓	✗
257		PowerPoint	ppt, pot, pps, pptx, potx, ppsx	✓	✓	✓	✓	✗
258		PDF	pdf	✓	✓	✓	✓	✗
259		Scan document	tif, tiff	✓	✓	✓	✓	✗
260		Image	jpg, jpeg	✓	✓	✓	✓	✗
261		E-mail	msg, eml	✓	✓	✓	✓	✗
262		Web document	htm, html	✓	✓	✓	✓	✗
263		Autocad DWG	dwg	✓	✓	✓	✓	✗
264		Autocad DXF	dxf	✓	✓	✓	✓	✗

Fig.: Entry types for documents

When filing documents, the document type is recognized automatically based on the file extension. To assign the icons used to the respective object types, enter the desired file extensions to the respective field in the *File extension* column.

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.

The screenshot shows the 'Encryption keys' management interface. On the left, there is a list of keys with columns for 'Name' and 'ACCT'. The 'ACCT' key is selected. To the right of the list are three icons: a green plus icon for adding a new key, a yellow circular arrow icon for reloading data, and a printer icon for printing information. The main area on the right is a form for editing the selected 'ACCT' key. It includes fields for 'Name' (containing 'ACCT'), 'Old password', 'New password', 'Confirm new password', 'System user' (with a 'Search for' placeholder), and another set of 'Old password', 'New password', and 'Confirm new password' fields. 'Save' and 'Cancel' buttons are located at the top right of the form.

Fig.: 'Encryption keys' menu item

Please note

The *Key function* is no longer used. For compatibility reasons with earlier versions, there can still be keys in the repository but you will no longer be able to view them in the ELO Administration Console. You now control access to documents with permissions and encryption keys.

Add encryption key (green plus icon): Use the *Add encryption key* button to add a new encryption key.

Reload data from server (yellow circle arrow icon): Click the *Reload data from server* button to refresh the list of encryption keys.

Print information for encryption keys (printer icon): Click the *Print information for encryption keys* button to print an overview of the encryption keys.

Name: Each encryption key can be assigned a name.

Old password: If you want to change the password of the encryption key, you need to enter the previous password in the *Old password* field.

New password: Enter the new password for the encryption key here.

Confirm new password: Confirm the new password for the encryption key.

System user: If a service account (e.g. *ELO Service*) needs access to an encryption key, enter the option group that the corresponding service account is a member of in the *System user* field.

Old password: If you want to change the password of the service account, you need to enter the previous password in the *Old password* field.

New password: Enter the new password for the service account here.

Confirm new password: Confirm the new password for the service account.

Information on encryption keys

Warning

A document's encrypted status cannot be reversed! Once a document has been assigned an encryption key, it is protected by a password and an encryption algorithm.

Documents with encryption keys

- are encrypted using a proprietary algorithm and can only be viewed with the ELO Viewer.
- can only be viewed at the system level using the ELO Viewer.
- remain encrypted. The encryption process is irreversible.

Delete and remove

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

Delete and remove

▼ Delete permanently

☐ Remove deleted entries

☐ Remove deleted document versions and attachment versions

Deletion date until

Delete permanently

i

Depending on the settings, all entries/versions that were deleted before the date specified will be permanently removed from ELO. These entries cannot be restored afterwards.

This process runs in the background and may take a long time depending on the size of the repository.

▼ Delete entries whose retention period has expired

☒ Documents only

☐ Documents and folders

Delete entries whose retention period has expired

i

The entries will be marked as deleted. They can be restored or deleted permanently with the corresponding functions.

Fig.: 'Delete and remove' menu item

Delete permanently

In the *Delete permanently* area, you can permanently delete entries, document versions, and file attachments that are marked for deletion (*Delete* function) from ELO and the database.

Warning

These entries cannot be restored!

Remove deleted entries: To permanently remove all deleted folders and documents from ELO, enable the *Remove deleted entries* check box.

Remove deleted document versions and attachment versions: To permanently remove all deleted document versions and file attachments, enable the *Remove deleted document versions and attachment versions* check box.

Deletion date until: In the *Deletion date until* field, you specify up to which date the objects should be deleted. The date on which the objects were deleted counts.

Delete permanently: Click the *Delete permanently* button to start the deletion process with the selected settings.

Delete entries whose retention period has expired

In the *Delete entries whose retention period has expired* area, you can permanently delete documents that have been assigned a lifetime or a retention period. Specify whether you want to delete *Documents only* or *Documents and folders*.

Delete entries whose retention period has expired: Click the *Delete entries whose retention period has expired* button to start the deletion process with the selected settings.

Stamps

'Stamps' menu item

Description: 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.

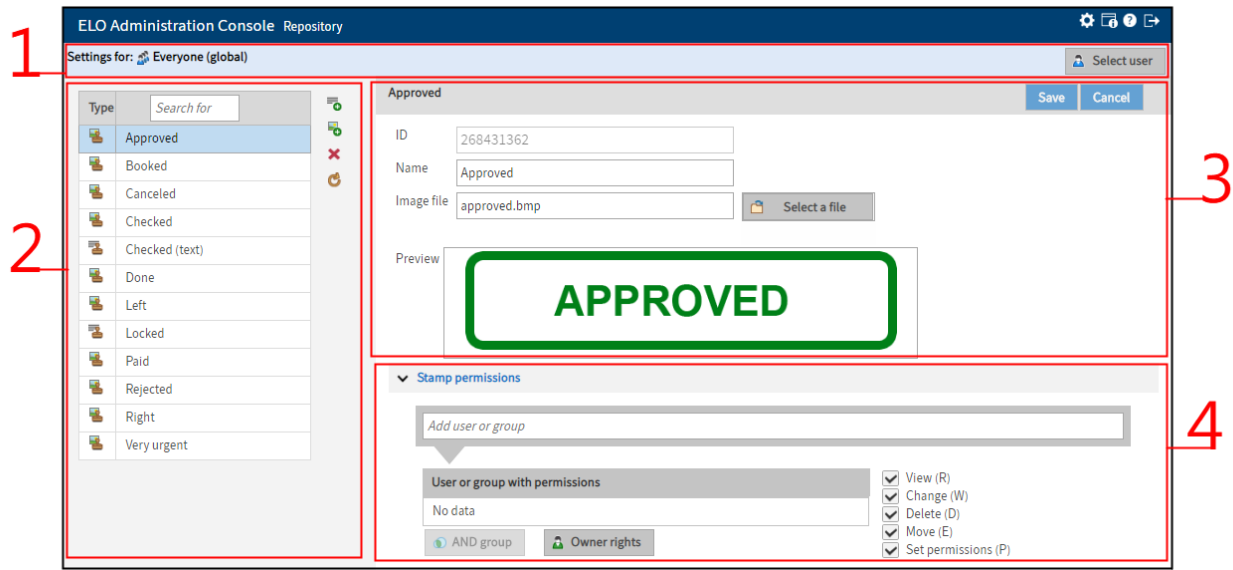


Fig.: 'Stamps' menu item

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

The *Stamps* area contains the following sections:

- 1 Settings for
- 2 List of stamps
- 3 Stamp settings
- 4 Stamp permissions

These are explained below.

1 Settings for

In *Settings for*, you can see who you are editing the stamp settings for.

Select user: Click the *Select user* button 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 stamp settings for.

Please note

Stamps created in the client are only available to the respective user.

To edit the stamp settings for all users (global), select the *Everyone* group in the ELO Administration Console.

2 List of stamps

Under *List of stamps*, you see all the stamps available to the selected user/option group, as well as the buttons for creating and deleting stamps.

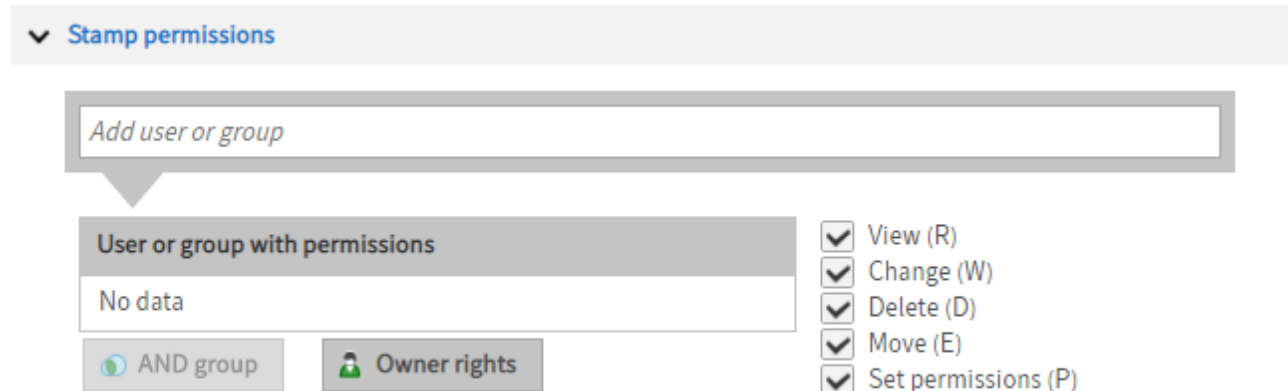


Fig.: 'Search for' field and buttons for creating/deleting stamps

Search for: You can search the list using the *Search for* field.

Add a text stamp (green plus icon combined with text icon): Click the *Add a text stamp* button to create a new text stamp. For more information, see the example *Add a new text stamp*.

Add an image stamp (green plus icon combined with image icon): Click the *Add an image stamp* button to create a new image stamp. For more information, see the example *Add a new image stamp*.

Delete (red X icon): Click the *Delete* button to delete the selected stamp.

Reload data from server (yellow circle arrow icon): Click the *Reload data from server* button to reload the *List of stamps* area.

3 Stamp settings

Under *Stamp settings*, you see the settings of the selected stamp. The stamp settings are edited in these fields. For more information, see the following examples.

4 Stamp permissions

The screenshot shows the 'New stamp' dialog box. At the top, there are 'Save' and 'Cancel' buttons. Below them are input fields for 'Name' (containing 'New stamp'), 'Text' (empty), 'Font' (set to 'Arial' and size '36'), and a 'Preview' area. The 'Stamp permissions' section is expanded, showing a search bar with the placeholder 'Add user or group'. Below the search bar is a list titled 'User or group with permissions' containing 'Everyone' with the permission 'RWDEP'. To the right of the list are five checked checkboxes: 'View (R)', 'Change (W)', 'Delete (D)', 'Move (E)', and 'Set permissions (P)'. At the bottom of the permissions section are two buttons: 'AND group' and 'Owner rights'.

Fig.: 'Stamp permissions' menu item

In the *Stamp permissions* area, you can edit the permissions settings that will apply if the stamp is used.

Please note

The configured permissions only apply to the applied stamp in the ELO system. Permissions do not control which users may use the respective stamp.

Add user or group: In the *Add user or group* field, you can add users or groups to the list *User or group with permissions*.

Search for: You can search the list *User or group with permissions* using the *Search for* field.

User or group with permissions: In the list *User or group with permissions*, you can see the permissions that users and groups have when using the stamp.

The following permissions are available:

- **View (R):** The user/group can see the applied stamp.
- **Change (W):** The user/group can change the size of the stamp.
- **Delete (D):** The user/group can delete the stamp.
- **Move (E):** The user/group can move the stamp around within the document.
- **Set permissions (P):** The user/group can change the permissions on the stamp. The user/group also requires the user right *Edit permissions*.

AND group: Use the *AND group* button to connect two or more groups. In this case, the assigned permissions only apply to users who are members of all groups connected as AND groups.

Owner rights: Click the *Owner rights* button to grant permissions to the user who created the stamp.

Members of the group: Under *Members of the group*, you can see all users who are a member of the selected group.

Add a text stamp

1. Click the *Add a text stamp* button.

New stamp Save Cancel

Name

Text

Font

Preview

Stamp permissions

Add user or group

Search for

User or group with permissions

Everyone RWDEP

☒ View (R)

☒ Change (W)

☒ Delete (D)

☒ Move (E)

☒ Set permissions (P)

AND group Owner rights

Fig.: New text stamp

The *New stamp* area opens.

2. Enter the name of the new text stamp to the *Name* field.
3. Enter the text to the *Text* input field that will appear as stamped text on the document.

A preview of the stamp will appear in the *Preview* field. The preview is refreshed automatically every time you make a change.

Please note

New stamps can also be created in the ELO Java Client. These stamps, however, are only available to the respective user.

Optional 1: Add placeholders if required.

- **Date:** Click the *Date* button to insert a placeholder for the current date (%x) at the selected position.
- **Time:** Click the *Time* button to insert a placeholder for the current time (%X) at the selected position.
- **User:** Click the *User* button to insert a placeholder for the user who created the stamp (%u) at the selected position.
- **Line break:** Click the *Line break* button to insert a placeholder for a line break (
) at the selected position.

The screenshot shows the configuration interface for a text stamp. It includes the following elements:

- Name:** A text input field containing "Locked from".
- Text:** A text input field containing "Locked from %X %X\nby: %u". To the right of the input are four buttons: a grid icon, a dropdown arrow, a user icon, and a line break icon.
- Font:** A dropdown menu showing "Verdanai" and a font size input field showing "36". To the right are five buttons: "B" (bold), "I" (italic), "U" (underline), "S" (strikethrough), and a color selection button (a red square).
- Preview:** A rectangular box showing the final stamp text in red: "Locked from 5:44:37 AM 5:44:37 AM by: Name".

Fig.: Example of a text stamp

Optional 2: In the *Font* area, you can change the settings for the font type, font size, font color, and stamp format.

Optional 3: You can edit the permissions on the stamp in the *Stamp permissions* area.

4. Once you have made all settings, click *Save*.

The new stamp is shown in the overview of available stamps on the left-hand side.

Add a new image stamp

1. Click the *Add an image stamp* button.

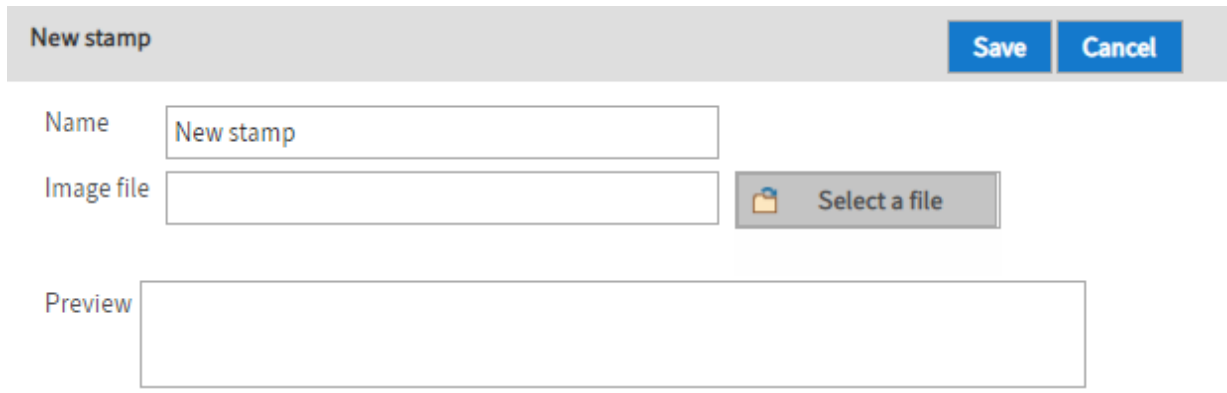


Fig.: New image stamp

The *New stamp* area opens.

2. Enter the name of the new image stamp to the *Name* field.
3. Click *Select file*.

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

4. Select the desired image file.

Information

The file formats PNG, JPG, GIF, and BMP are allowed.

The maximum file size is 1000 KB.

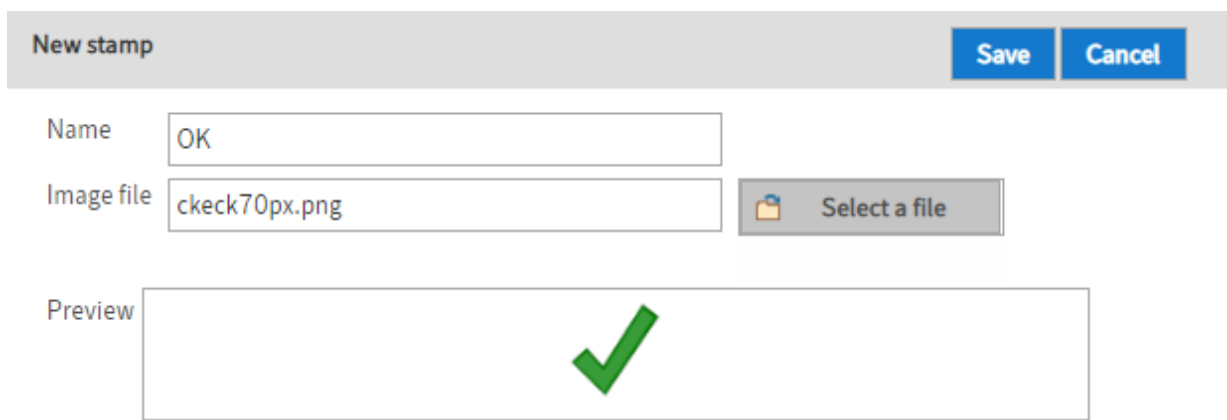


Fig.: Example of an image stamp

The selected image appears in the *Preview* field.

Optional: You can edit the permissions on the stamp in the *Stamp permissions* area.

5. Once you have made all settings, click *Save*.

The new stamp is shown in the overview of available stamps on the left-hand side.