

ELO Java Client

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Basics

What is the ELO Java Client?

The ELO Java Client, also called client in the following, is used for accessing ELO repositories. The client enables you to manage, search, and find documents. In addition, you can use the client to create workflows and reminders, and to view documents.

Target audience

This documentation is aimed at ELO Java Client users. Administrators can use the [ELO Java Client administration](#) manual.

Operating system

In this documentation, the functions and examples are shown based on a Microsoft Windows operating system.

The ELO Java Client can also be used on other operating systems provided a corresponding Java environment is available for the operating system.

Getting started

If you have no previous experience with the ELO Java Client or any other ELO client, the following chapters are a good place to start:

- Important actions in detail: This chapter introduces you to some important features with detailed step-by-step instructions and explanations. With the help of these instructions, you will learn basic actions in the ELO client, which can be applied to most other functions. If you initially want to test a function that does not affect other users, the Create tile function is a good choice.
- Program interface, Navigation and use, Important components: These chapters explain the interface and how to use ELO in general. They cover individual topics at a more advanced level.

Structure of the documentation

Basics

This chapter contains general information about using the documentation and an overview of the chapter contents.

Program interface

This chapter contains an introduction to the program interface and a description of all work areas.

Navigation and use

This chapter provides information about the basics of using the client.

Simple operation

This chapter contains information about the accessibility features in the ELO Java Client.

Important components

This chapter contains a description of important components that you will find in all work areas.

Important actions in detail

This chapter provides descriptions of some important actions with instructions and explanations.

Functions

The remaining chapters cover the functions that are not described in the *Important actions in detail* chapter. These chapters are named after the area of the program where you find the functions, such as the '*New*' tab.

Which chapter(s) should I read if I...

want to personalize my client?

Tile navigation:

- Create new tile
- Add search favorite
- Group tiles
- Change tile settings

Ribbon:

- Pin function
- Hide function text
- Pin function to the 'Favorites' tab

Viewer pane:

- Configure view profiles
- Change how entries are displayed

General settings:

- Configuration

Personal settings:

- Edit profile

want to create entries?

Folders:

- Create new folder
- Dynamic folder

Documents:

- Insert document

Metadata:

- Metadata
- Personal data

want to update entries?

- Edit document
- Edit folder
- Check out to OneDrive
- Load new version

want to create tasks?

Workflows:

- Start workflow
- Start ad hoc workflow

Reminders:

- Create reminder

want to edit tasks?

Workflows:

- Show workflow
- Forward workflow
- Accept workflow
- Return workflow
- Delegate workflow
- Hand off workflow
- Postpone workflow

Reminders:

- Edit or delete

want to keep track of changes in ELO?

My ELO:

- 'My ELO' button
- News

Monitoring entries:

- Monitor changes
- Monitoring overview

Overviews:

- Workflows for this entry
- Workflow overview
- Monitoring overview

Search:

- Save search
- Dynamic folder

want to output information from ELO?

- Send as ELO link
- Send document
- Save as
- Print document
- Create external link

want to search for entries?

- 'Search' work area
- Search entries
- Search metadata

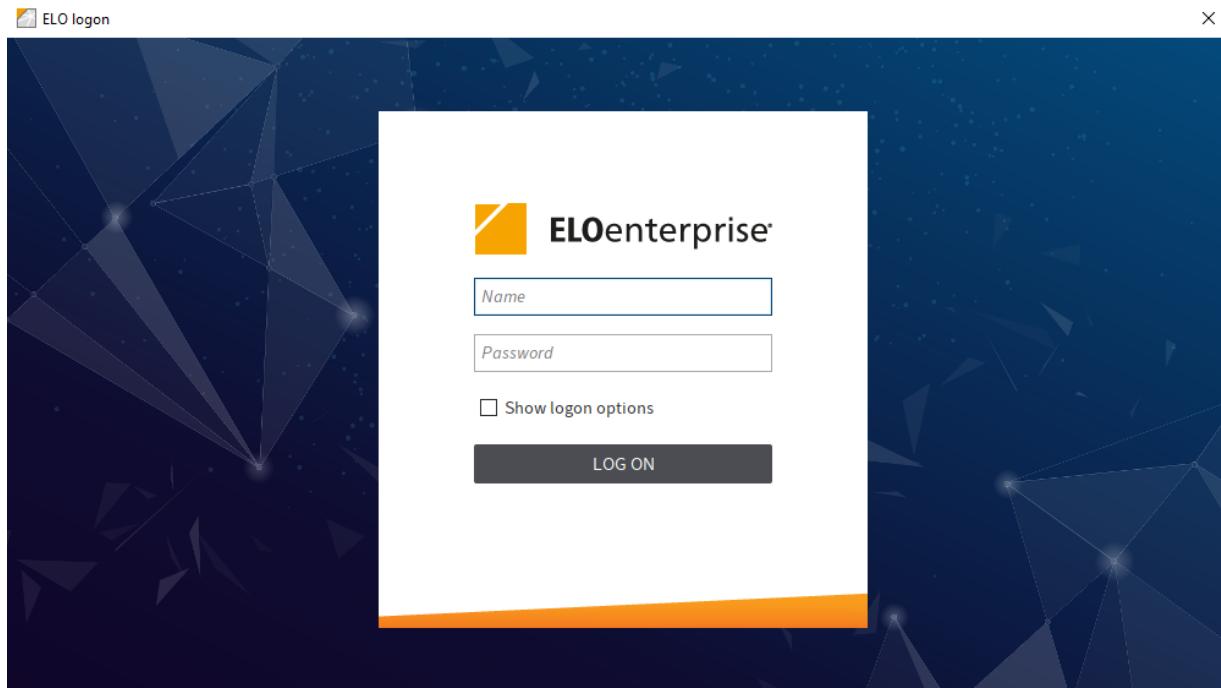
want to structure the repository area?

- Move
- Reference
- Copy
- Link

Start the ELO Java Client**Logon**

1. Double-click the ELO Java Client icon on the desktop.

Alternative: Run the *EloClient.exe* file in the program directory of the client.



The logon dialog box appears.

2. Enter your ELO user name and password.

Please note

Your ELO user password may differ from your Microsoft Windows password. You can obtain your ELO user ID from your administrator.

Optional: To select a specific repository or to change the language of the ELO Java Client, check the *Show logon options* box.

You can select the repository and the language from the drop-down menus.

Information

The repositories that you can select are defined by your administrator. You can find more information for administrators in the [ELO Java Client administration](#) documentation.

3. Click *LOG ON*.

The ELO Java Client opens.

Error message

If the ELO Java Client does not start, an error message will appear.

Internal errors are displayed in yellow. In this case, you either entered the wrong password or the account has been locked. Enter your logon information again. If the account is locked, contact your administrator.

External errors are displayed in red. In this case, there is an issue with the server connection. Contact your administrator.

Program interface

You can customize the program interface to meet your own requirements. You can change the font size and color scheme in the client.

Change font size

You will find the settings for the font size on the *Ribbon > User menu [your name] > Configuration > Display > Font*.

You can change the font size in the user interface with the slider. You see a preview of the selected font size to the right of the scale. Click *OK* to confirm the changes.

Change color scheme

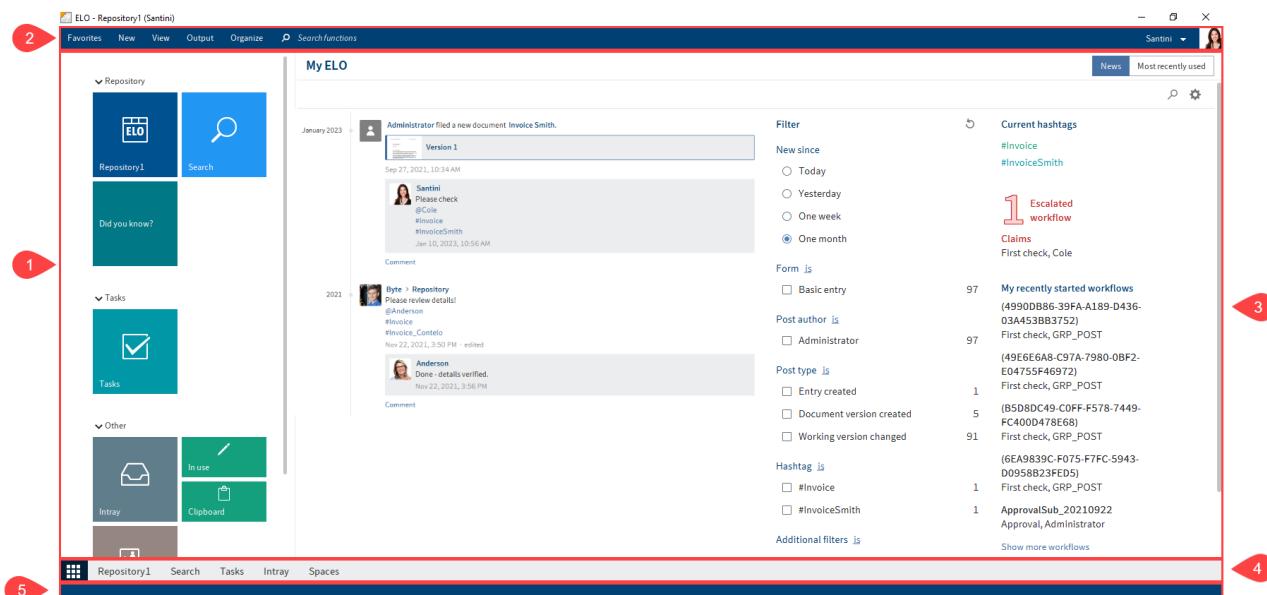
You will find the settings for the color scheme on the *Ribbon > User menu [your name] > Configuration > Color scheme*.

You see which color scheme is currently selected under *Color scheme*. To select another color scheme, click the desired color. Click *OK* to confirm the changes.

Please note

The ELO Java Client restarts automatically if you change the color scheme or the font size.

The ELO Java Client opens to the *My ELO* work area. The areas are described briefly in the following.



1 [Tile navigation](#): This area is for navigating the program. The tiles take you to work areas or to selected functions.

2 [Ribbon](#): On the ribbon, you will find the functions available to you.

3 [News](#): The News area helps you to keep track of developments in ELO.

4 [Navigation bar](#): Navigate between the work areas using the navigation bar.

5 Status bar: The status bar contains information on the currently selected entry or area. This includes the number of available entries or the repository path.

What is a work area?

An ELO client contains different work areas. Each work area is used to complete specific tasks. Accordingly, not all functions are available in every work area.

The ELO Java Client contains the following work areas:

- [My ELO](#): This work area is on the home screen when you start the program. Tiles on the left-hand side provide access to the main areas in ELO.
- [Repository](#): This area contains all folders and documents that you are authorized to access. This is also where you create additional folders and documents.
- [Search](#): This area is where you search for folders and documents that are stored in the *Repository* work area.
- [Tasks](#): If you are assigned tasks, you will find them here. Tasks are always related to entries (folders or documents) in the *Repository* work area.
- [Intray](#): The Intray is the central work area for incoming documents. You can store documents in ELO via the Intray.
- [Clipboard](#): You can copy frequently used folders and documents from the *Repository* work area to the Clipboard. This enables you to quickly find the entries you need frequently or are currently working on.
- [In use](#): When you edit a document, it automatically appears in the *In use* work area. Editing a document means that you have checked it out using the *Check out* function.

'My ELO' work area

The screenshot shows the 'My ELO' work area. On the left, there's a sidebar with tiles for 'Repository' (containing 'Repository1' and 'Search'), 'Tasks' (with a checkmark icon), and 'Other' (containing 'Intray' and 'Clipboard'). The main area is titled 'My ELO' and shows a news feed. The first post is from 'Administrator' on January 23, 2023, at 10:34 AM, stating 'Administrator filed a new document Invoice Smith.' with a link to 'Version 1'. Below it is a comment from 'Santini' on Sep 27, 2021, at 10:56 AM, saying 'Please check @Cole #Invoice #InvoiceSmith'. The second post is from 'Byte' on Nov 22, 2021, at 3:50 PM, in the 'Repository' category, asking to review an invoice. A comment from 'Anderson' on Nov 22, 2021, at 3:56 PM, says 'Done - details verified.' A sidebar on the right lists 'Current hashtags' (#Invoice, #InvoiceSmith) and an 'Escalated workflow' for 'Claims' (First check, Cole). Filter options like 'New since' (Today, Yesterday, One week, One month) and 'Form' (Basic entry, Post author, Post type, etc.) are also visible.

The *My ELO* work area is on the home screen when you open ELO. Tiles on the left-hand side provide access to the main areas in ELO.

Open the *My ELO* work area using the button at the bottom left of the screen.

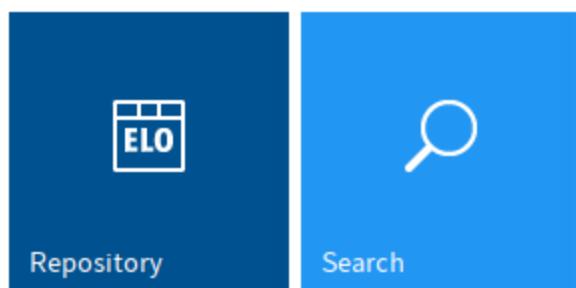
The *My ELO* work area contains the following areas:

- [Tile navigation](#): Use the tiles to switch to other work areas.
- [News](#): Feed posts relating to different entries are displayed in the *News* area. For example, you will see posts from subscribed feeds or posts you were mentioned in by another user. You will also find an overview of your workflows as well as current hashtags.
- [Most recently used](#): The *Most recently used* area contains a list of documents that you recently viewed or edited. This way, you can quickly access these entries again.

Tile navigation

The tile navigation contains all available tiles. Tiles can be used to represent work areas, views, and ELO apps. Clicking a tile takes you straight to the corresponding area.

Repository

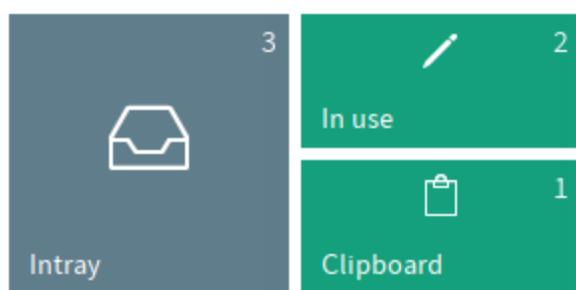


Did you know?

Tasks



Other



» [Hidden tiles](#)

You can create new tiles for folder and task views. Use the function New view (available in: *Ribbon > View*).

You can group and edit tiles using the context menu.

Groups

By default, the tile navigation area is divided into the groups *Repository*, *Tasks*, *Other*, and *Hidden tiles*.

You can edit the groups using the context menu. To open the context menu, right-click the group name. The following functions are available:

Add group: Use the *Add group* menu item to create your own groups in the tile navigation area.

Rename group: Use the *Rename group* menu item to change the respective group name. This function is only available for your own groups.

Delete group: Use the *Delete group* menu item to delete the respective group. All tiles in the deleted group are moved to the *Hidden tiles* group.

Restore default settings: This option enables you to revert changes to tiles and groups in the tile navigation area and restore the default values. Click the menu item *Restore default settings*. In the dialog box, you can choose between:

- Default client settings: Restores all settings in the tile navigation area to the default values on installation.
- Same settings as at the start of the current session: Discards all changes made since the last time you started the ELO Java Client. Changes made prior to that session are retained.

Edit tile

You can customize tiles in ELO. You can make a number of tile settings straight from the tile's context menu. You will find other settings in the *Tile settings* area.

Information

You can create new tiles for folder and task views. Use the function *New view* (available in: *Ribbon > View*).

Context menu

You can make a number of tile settings straight from the tile's context menu. Right-click the tile to open the context menu.

You can make the following settings:

- Pin to the navigation bar
- Show tile overlay in drag-and-drop
- Shrink/enlarge tile
- Hide
- Delete view (only for tiles you created yourself)

Information

Hidden tiles are moved to the *Hidden tiles* group. To restore the tile, drag it to the desired location in the tile navigation.

Tile settings

Open the *Tile settings* area from the *context menu (right-click) > Settings*. You can make the following settings in the *Tile settings* area:

- Name
- Color
- Icon
- Size
- Pin to the navigation bar, show tile overlay in drag-and-drop, show number of entries, diagram view
- Keyboard shortcut to open the tile

Information

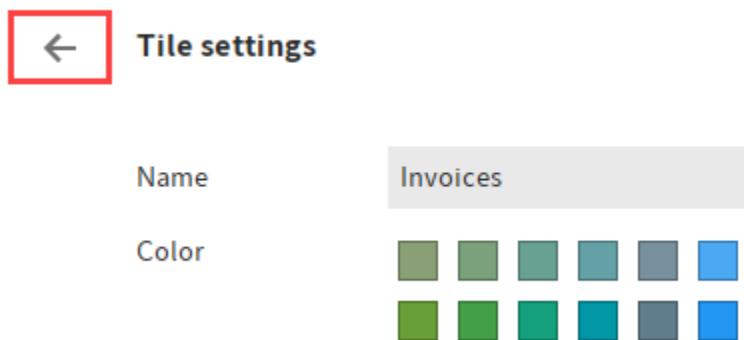
Different settings are available depending on the type of tile you want to edit.

Information

When you click another tile in edit mode, you switch to edit mode for the tile you clicked.

Several settings are described in more detail below.

Save changes



To close edit mode and save the changes, click the arrow pointing left.

Edit name

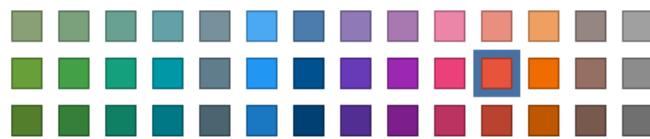
You can change the name of tiles you created yourself (repository views and task views). Click *Edit view*.

[← Tile settings](#)[Edit view](#)

Name

Invoices

Color



Options

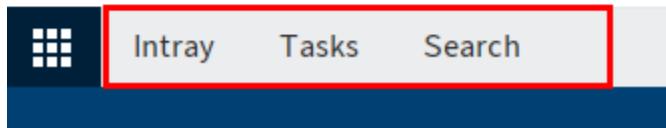
You can select different options depending on the type of tile you are editing.

Pinned to the navigation bar: Click this option to pin the tile to the navigation bar.

Hold down and drag with the left mouse button to move the individual areas on the navigation bar.

Intray

Clipboard

[› Hidden tiles](#)

Show tile overlay in drag-and-drop: If this option is enabled, the tile appears as an overlay when you drag and drop an entry to the repository. Drop the entry onto the overlay to move it to the respective area.

The screenshot shows the ELO Java Client interface. On the left, there is a navigation tree under the 'Finance' category. Under 'Orders', there is a node for '2018'. Under 'Invoices', there are four nodes: 'Invoice expected', 'Invoice received', 'Invoice expected', and 'Project data'. A tab labeled '[2] Invoice Krammper GbR' is selected. On the right, there is a dashboard titled 'Invoice Krammper GbR' with several tiles. One tile, 'Orders', has a red border and displays the number '2' in its top right corner. Other tiles include 'Repository', 'Offers', 'Intray', 'Clipboard', 'Metadata form', 'Invoice', 'Version control', 'Date', and 'Tasks'. The 'Clipboard' tile has a green background.

Show number of entries: If this option is enabled, the number of entries in an area is displayed at the top right of the tile.

Diagram view: If you enable this option, a circular diagram is depicted on the tile. Depending on the entries in that particular work area or view, the diagram is made up of several segments in different colors. The colors relate to the font color selected for the entries.

Information

The *Diagram view* option only works when the tile size is set to *Large*.

Keyboard shortcut

You can assign a keyboard shortcut for quick access to a tile. Click the field and enter the desired keyboard shortcut.

Please note

Do not use a keyboard shortcut that is already being used by ELO or other programs.

News

The screenshot shows the ELO Java Client interface with the 'News' tab selected. At the top, there is a search bar labeled 'Search functions' and a user profile for 'Administrator'. Below the header, the main area is titled 'My ELO'. On the left, a feed post from 'Cole' is displayed, mentioning 'Order Cole' and asking to check '#OrderCole @GRP_SALES'. The post was made 'an hour ago'. There are icons for commenting and sharing. In the center, there is a 'Filter' section with a dropdown menu set to 'New since' and options for 'Today', 'Yesterday', 'One week', and 'One month'. To the right, a 'Current hashtags' section lists '#Order', '#OrderCole', '#companyparty', and '#officeparty'. A red box highlights the 'News' tab in the top navigation bar.

Feed posts related to different entries are displayed under the *News* tab. For example, you will see posts from subscribed feeds or posts you were mentioned in by another user. You will also find an overview of your workflows as well as current hashtags.

Information

If you don't see any posts in the *News* work area, check your filter settings. It is possible that there are no posts for the selected period (under *New since*).

The news tab contains the following areas and functions:

Feed: The feed contains posts related to different entries. This applies to feeds such as those that a user has subscribed to or in which they are mentioned by another user. New feed posts are denoted with a green dot.

Filter: You can filter the feed posts. In the *News* area, you can filter the posts by date (*New since*) or by the person that created the post (*Post author*).

Information

If you don't see any posts in the *My ELO* work area, check your filter settings. It is possible that there are no posts for the selected period (under *New since*).

Search feed: Click the *Search feed* (magnifying glass icon) button to open a search field. Enter a search term and click *Search*. The search results are displayed. Any matches are highlighted.

Use *Reset search* (X icon) to delete the content of the search field. The feed posts are displayed in *My ELO* according to the filter settings.

Settings: Click the *Settings* button (gearwheel icon) to open the *Settings* pane. This pane contains the options for *My ELO settings*, *My subscribed hashtags*, *My polls*, and *My profile* (person icon at the top right).

Current hashtags: Trending hashtags in ELO are listed here. Clicking a hashtag opens the overview for the selected hashtag, where all posts marked with the hashtag are shown.

Substitution: If you have any active substitutions, you can see who you are substituting for here and who your current substitutes are.

Workflows: Under *Workflows*, you can see all workflows you are involved in. Workflows with passed deadlines are highlighted in red.

Clicking the workflow name takes you to the workflow in the *Tasks* work area.

Feed functions

The standard feed functions, e. g. create a post, or refer to a document, are described in the Feed chapter.

Feed posts are marked with the name and profile image of the author. You can read how to edit your profile in the chapter Edit profile. To view another user's profile, click on the profile image or the user name.

In *My ELO*, you can also mark feed posts as important or hide them.

Mark post as important

Cole > Order Cole
Please check
#OrderCole
@GRP_SALES
3 minutes ago
P Comment

Posts older than one month are removed from the *My ELO* work area. To show posts in *My ELO* permanently, you can mark them as important. The *Mark as important* button (flag icon) lets you pin a post to the *My ELO* work area. The post remains in *My ELO* even if it is more than one month old. You can recognize posts that are marked as important by the red flag icon.

To delete the marker, click the red flag icon. As soon as the post is more than a month old, it will no longer be displayed in the *My ELO* work area.

[Hide post](#)[Cole > Order Cole](#)

Please check

#OrderCole

@GRP_SALES

3 minutes ago

[Comment](#)

If you no longer want to see a post, you can hide it in the *My ELO* work area. Click the X icon below the post.

Information

The *Remove from My ELO* function only hides posts in your *My ELO* work area. The post is not deleted. It stays in the feed for the corresponding entry.

If you hide a post, the *Undo* function is displayed. To show the post again, click the button.

Information

The *Undo* function is only displayed for 5 seconds by default. You can change the length of time it is displayed in *My ELO > Settings > My ELO settings*.

Alternative: To hide all posts in *My ELO*, use the *Remove all posts from My ELO* function. You will find this function in *My ELO > Settings > My ELO settings*.

Information

Posts marked as important are not removed.

Filters

You can search the feed in the *My ELO* work area for specific terms (magnifying glass icon) as well as filter it by specific criteria. You can select the following filters:

- New since: Filter the feed by the date the post was created. You can choose between: *Today*, *Yesterday*, *One week*, and *One month*.
- Metadata form: Filter the feed by the metadata form of the entries that the post is related to.
- Post author: Filter the feed by the users who created posts.
-

- Post type: Filter the feed by the type of post. There are two post types: Automatically created posts (e.g. *Document version created*) and posts created by users (*User posts*).
- Hashtag: Filter the feed by hashtags.
 - Additional filters: Depending on the settings, additional filters are available, e. g. filter by posts you are mentioned in.

Information

In the default settings, all filters are applied in *is* mode. You can also set the filters to *is not* mode. To change this mode, click *is/is not* next to the filter category.

Apply filters

To apply a filter, click the corresponding filter in the list.

Reset filters

Filter

Current hashtags

New since

#Order

Today

Yesterday

To reset all filters, click the *Reset filters* button (arrow icon).

Most recently used

File	Date	X
Planning	Jan 26, 2023, 12:59 PM	X
Offers	Jan 26, 2023, 12:58 PM	X
Marketing	Mar 28, 2022, 12:42 PM	X
EXTEN	Mar 21, 2022, 10:12 AM	X
Offer-Zastry_2020_0001	Mar 21, 2022, 10:12 AM	X
Orders	Mar 21, 2022, 10:12 AM	X
Invoices	Mar 21, 2022, 8:54 AM	X
Finance	Jan 17, 2022, 11:56 AM	X

The *Most recently used* area contains a list of documents that you recently viewed or edited. Click an entry to go straight to its filing location in the repository.

You can pin entries to the top of the list with the pin icon.

To remove an entry from the list, click the X icon.

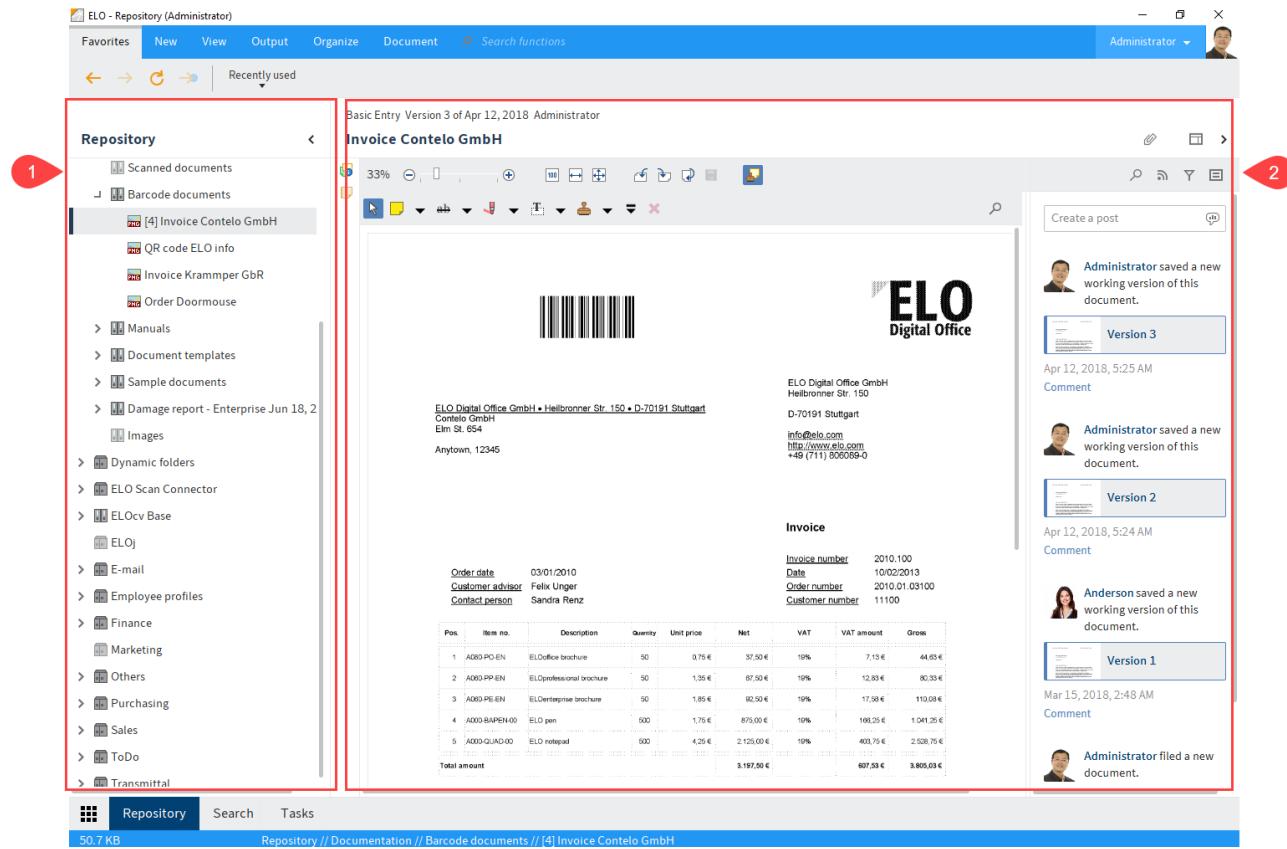
A search field for filtering the entries appears if there are more than ten entries.

Information

The maximum number of entries in the *Most recently used* area is 100 by default. You can change this value in the configuration (*Ribbon > User menu [your name] > Configuration > Display > Maximum number of documents in the "Most recently used" list*).

'Repository' work area

The *Repository* work area is the central work area of the client. This is where you manage your documents and data. For example, you can create new documents and folders, open documents in read-only mode, or send documents in different formats.



The *Repository* is divided into the following areas:

1 Repository structure: Overview of entries (folders or documents)

2 Viewer pane: View of entries selected in the tree (folders or documents)

You can change the layout of the repository structure and create view profiles for the viewer pane. For more information, refer to the chapters Repository structure and Viewer pane.

If there are a lot of documents in your repository, it can be helpful to create an additional view. A view shows a section of the repository. It is also shown as a tile in the tile navigation.

To create a new view, select a folder in the *Repository* work area. On the ribbon, click *View > New view*. The *New view* dialog box opens. The name of the selected folder is entered by default. If required, change the name of the view. Click *OK*.

'Search' work area

In the *Search* work area, you can search for files and documents in ELO. The search results are displayed here. You can create search favorites and search views.

The screenshot shows the ELO Java Client interface with the 'Search' work area selected. The ribbon at the top includes tabs for Favorites, New, View, Output, Organize, Document, Search, and Search functions. The 'Search' tab is highlighted. Below the ribbon, there are buttons for Metadata form, Filters, Search favorites, Recent search requests, Search logic, and Result. The main search results pane displays a search for 'contelo'. One result is an invoice from 'Invoice Contelo GmbH' dated 'Version 1 of Feb 20, 2018' to 'Anderson'. The invoice details include the company's address in Stuttgart, Germany, and a table of items with descriptions, amounts, and taxes. To the right of the search results, there is a sidebar with a post from 'Anderson' about a new document, dated 'Feb 20, 2018, 5:31 AM'.

When you open the *Search* work area, an additional *Search* tab appears on the ribbon. The *Search* tab contains different functions, such as for searching the metadata, creating search filters, and adding search favorites.

Information

The chapter *Search entries* explains how to run a search, narrow down the results, and view the hits.

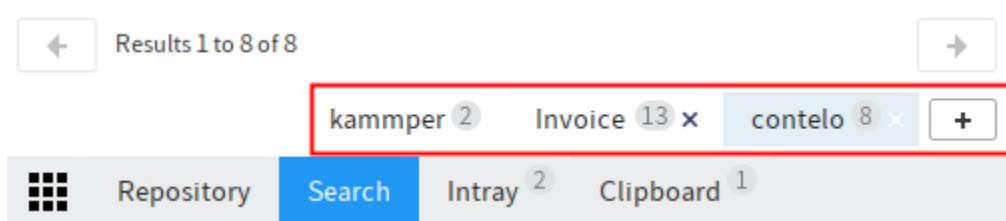
The chapter 'Search' tab contains information on how to search the metadata using a form or create a dynamic folder.

Information

You can specify a keyboard shortcut that takes you straight to the search input field from a work area. Create a keyboard shortcut for the function *Switch to search input field* (available in: *Ribbon > User menu [your name] > Configuration > Quick access to functions*). For more information, refer to the chapter Configuration.

Create search view

If you use the *New view* function (plus icon at the end of the search results list) in the *Search* work area, you create a temporary search view.



A search view is used to temporarily save search results and search settings. Search views appear in a bar on top of the navigation bar.

Information

Metadata searches are automatically saved as a temporary search view.

Please note

These search views are deleted when you close ELO. If you want to save a search request, use the Save search function (in the *Search* work area under *Ribbon > Search > Search favorites*).

ELO iSearch functions

ELO iSearch uses special search algorithms that improve the search function.

iSearch offers the following functions:

Autocomplete

The autocomplete function provides a list of possible search terms that fit the character sequence already entered. The longer the term you enter, the more exact the suggestions are. ELO iSearch

only suggests terms for matches in ELO. If no suggestions appear, there are no matches for the character string entered. To search for a suggestion, double-click on the term.

Autocorrect

Autocorrect provides suggestions for search terms which return very few or no results. This can be especially useful if you made a typing error while entering the search term. If this is the case, ELO will suggest similar terms. A message appears underneath the search field: "Did you mean... " followed by the suggestions generated by ELO. Click on one of the suggested terms to show the search results for the chosen term.

Linking search terms

The Boolean search function, a form of complex search, enables you to formulate search queries using the AND and OR operators.

AND connections search for matches that contain both terms.

The operators for an AND search are:

- AND
- &&

Information

The AND connection is enabled by default. If you enter more than one term, the terms are automatically linked with AND unless you use another operator.

OR connections search for matches that contain at least one of the terms.

The operators for an OR search are:

- OR
- ,
- ||

Example: Order, Invoice

Logical parentheses

You can use logical parentheses to enter an alternative search string. Parentheses determine which terms to search for in addition to the actual search term.

For example, you may be searching for an invoice, but you are not sure if it was filed as an invoice, bill, or receipt. In this case, enter the term which should first be used to search and then add the two alternative terms in parentheses. I.e.: invoice (bill, receipt).

Exclude terms

The term that you want to exclude must be separated from the actual search term by a space and a hyphen (minus sign). For example, if you search for the term *invoice* and exclude the term *receipt*, you must enter the following search command: *invoice -receipt*.

Phrase search

The phrase search works with groups of words which are connected. This can be a fixed expression, e. g. *write e-mails*. It can also be any sequence of words. The phrase you are looking for must be placed inside quotation marks. For example, if you want to find all documents with the word combination To Whom It May Concern, type the following: "To Whom It May Concern".

Range search

The range search enables you to limit the search to a specific range. This makes the search faster and significantly increases the accuracy of the results.

You need to enter the ranges in square brackets and separate them with T0. For example, you want to search all folders in the range 03 to 05. Enter the search command [03 T0 05].

Search for alternative terms

ELO iSearch provides alternatives (synonyms) for many terms. Enter a space after the search term. ELO iSearch suggests corresponding synonyms if any are available. To add a synonym to a search, click the desired suggestion.

Wildcard search

It is also possible to use the placeholder (wildcard) *, as is common in other Windows programs, in the search. This means you can use the * placeholder to search for sequences or character strings.

Information

You can use a question mark as a wildcard. However, you will then need to enter your search term in lowercase letters. The question mark can only be used as a wildcard at the end of a word.

Search for sequences

There are several possibilities for this type of search, which will be explained with the following examples:

Let us assume you are looking for companies with "ow" in the name. Enter *ow* in the *Company* field of the search form. The search will return all documents containing the letters "ow" in the company name, e. g. Owen, Townsend, etc. In other words, the search looks for the range between the two asterisks.

Search "Beginning with" or "Ending with"

If you omit either of the limits marked by the *, you will define a search as *beginning with* or *ending with*. This search option can be set as the default in the metadata forms. However, the option is not visible in the metadata form.

For example, you want to search for customers whose customer number starts with 15. To do so, enter 15* to the search form in the *Customer number* field. ELO finds all documents in which the entry in the *Customer number* field begins with 15. If you enter *er in the field *Supplier*, all the documents that have er at the end of the entry in the *Supplier* field will be found.

Information

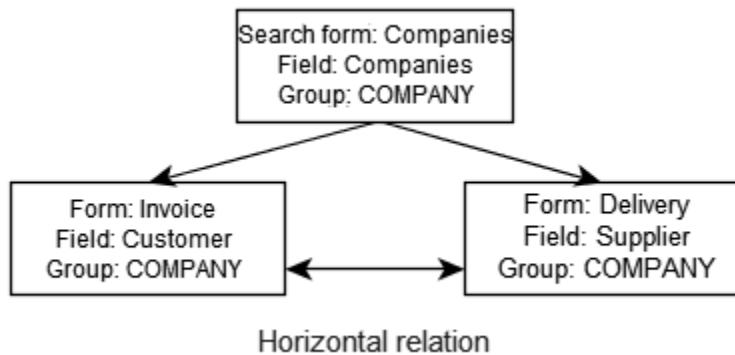
You do not need to use the wildcard * in the *Short name*, *Date*, or *Extra text* fields. ELO displays all documents that contain the character string in the field in whatever form.

Universal search

ELO lets you perform a universal search for certain attributes. This applies to all fields that use the same group as well as fields that have an identical component in the group name.

If you want to search multiple metadata forms, the group names of the fields on different keywording forms have to be identical. Using the same group creates a horizontal relation between the fields.

Identical group



Example: All numbers

The universal search can also be used if multiple fields do not use completely identical group names. However, all fields in the group name must have an identical component at the beginning of the group name.

This is useful, for example, for a universal search for numbers. Please take the following into account:

Fields for numbers must use a common characteristic (for example: NO):

- Invoice number field: NO/NV group
-

- Customer number field: *NOCUST* group
- Supplier number field: *NOSUPPL* group

The search form requires a field (*All numbers*, for example) that uses *NO** as a group name.

If you use this search form with the *Search metadata* function, you can perform a universal search for all numbers.

For example, if you enter *2** as a search term in the field on the search form, ELO finds all documents that contain a number in the metadata that starts with *2*.

'Tasks' work area

Priority	Type	Workflow state	Type	Name	Editor
I	A	First check	Claims	Cole	
A	B	Decision	AddNoteConfirmFlow	Administrator	
A	B	For review	Study on the use of Microsoft ...	Administrator	
A	B	C User admin	XCTEST	Administrator	
A	B	C User admin	XCTEST	Administrator	
I	B	C Invoice	Invoice		
A	B	C User admin	XCTEST	Administrator	
A	B	C User admin	XCTEST	Administrator	
B	B	For review	EX10_2020_meeting minutes	Administrator	

Decision

EX10 GmbH • Zettburger Str. 10 • D-71010 Iksheim
Schranz GmbH
Fauststraße 68 D

40415 Mondsee

Administrator filed a new document.
Version 1
Feb 11, 2019, 10:10 AM
Comment

Tasks 9 Intray 4
30 KB Repository1 // ELOwBase // EXTEN // HR // 2014 // Invoices // Invoice Contelo 1 process running

In the *Tasks* work area, you will find a list of your tasks.

The following types of tasks are available; you can differentiate between them based on their icon.

Icon Meaning

Workflows (workflow icon)

Workflows with form (form icon)

Reminders (calendar icon)

Icon Meaning



Monitoring (camera icon)

The tasks are sorted according to their priority: A (high), B (medium), and C (low). Overdue tasks are denoted with a red icon with a white exclamation mark. New unread tasks are denoted with a green dot. You can mark a task as unread via the context menu (right-click or MENU key).

Please note

You cannot set a *Read* marker for group and substitution tasks.

The option *Show tasks due in the following number of days* enables you to specify how many days in advance tasks should be shown in the task list. You will find this option under *Ribbon > User menu [Your name] > Display > Task list display options*.

For a better overview, you can sort and filter your tasks according to your needs.

You can sort the column by clicking the column heading. Clicking once sorts the items in ascending order. Clicking a second time sorts the items in descending order. Clicking a third time clears the sort order.

To filter the list by specific criteria, click the triangle icon next to the column title.

Tasks

Priority	Type ▾
A	all
A	Custom...
A	Workflow
A	Form
A	Reminder

You can create a filtered view for tasks. For example, you can only show reminders or tasks with expired deadlines. Use the function *New view* (available in: *Ribbon > View*).

Click an entry in the task list to view its contents in the viewer pane.

For workflows with forms, you will find the form on the *Form* tab. You can edit and forward it here.

Tasks disappear from your Tasks work area in the following ways:

- Workflows:
 - Actively: You forward the workflow using the form or the function (*Ribbon > Tasks > Forward workflow*), delegate it, or hand it off.
 - Passively: A group workflow is accepted by another member of the group.
 -

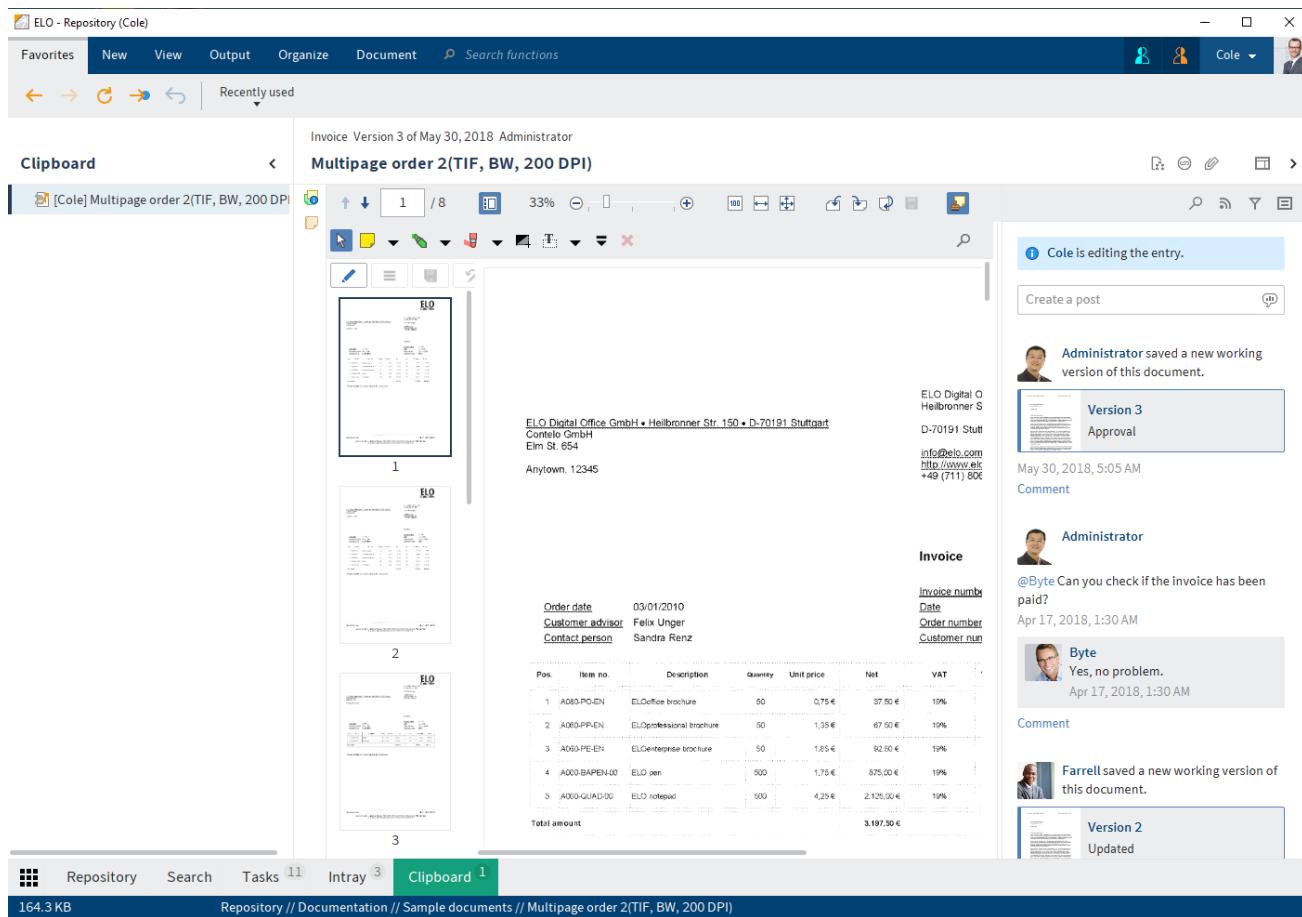
Reminders and monitoring: You delete the task (*Ribbon > Organize > Delete*).

You will find more information here:

- Functions on the 'Task' tab
- Start workflow
- Forward workflow
- Create reminder
- Monitor entry

'Clipboard' work area

The *Clipboard* work area is where you can temporarily store documents and folders. You can also use it to create a kind of favorites list.



To transfer a folder or document from the *Repository* work area to the *Clipboard*, select the folder or document and click the *Copy to Clipboard* button on the ribbon (*View > Navigation*). Alternatively, you can also drag entries to the *Clipboard*.

You can edit entries on the *Clipboard* in the same way as entries in the *Repository* work area. The changes are applied to the *Repository* work area.

Navigation and display are the same as in the '[Repository](#)' work area.

Please note

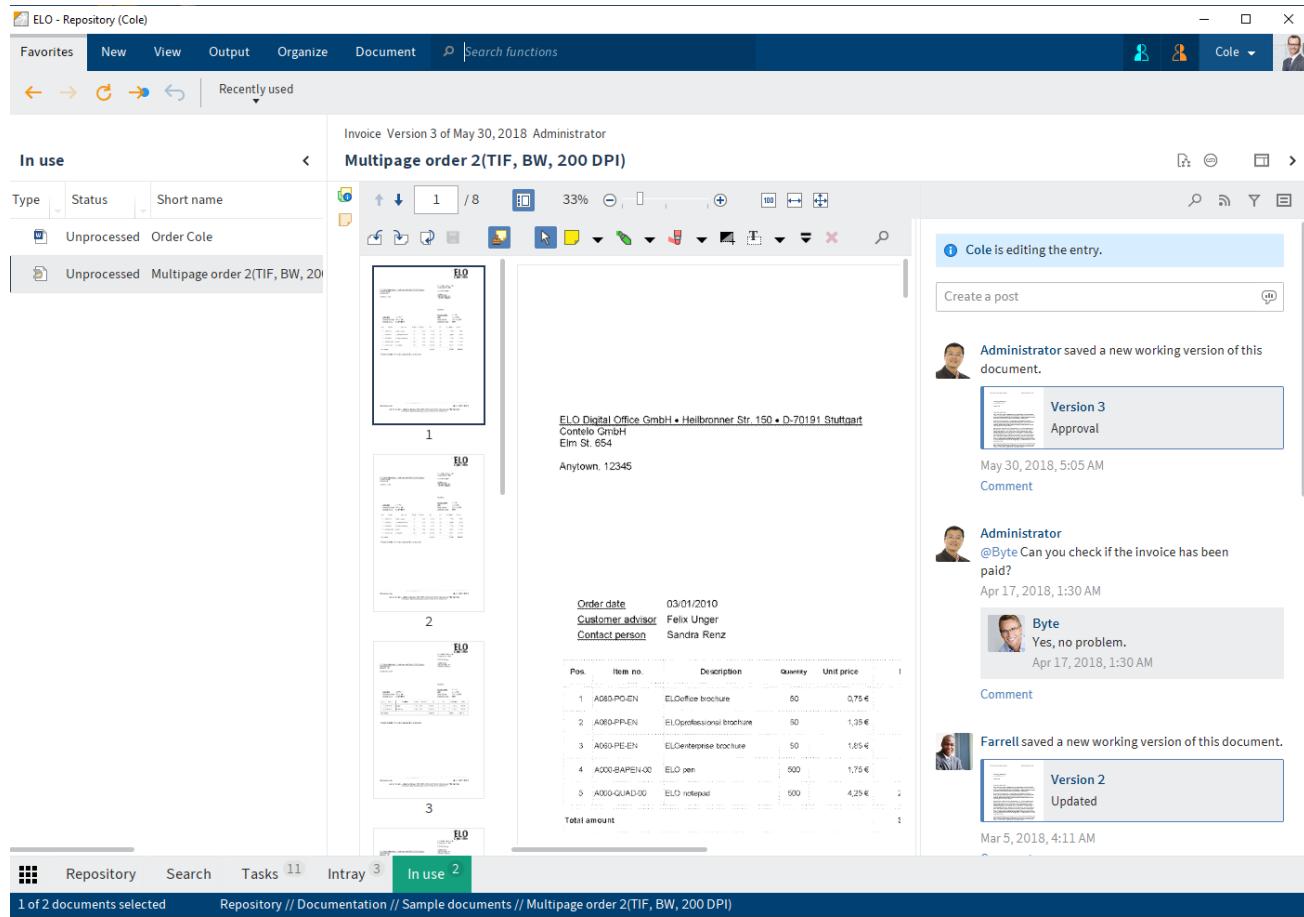
The documents on the Clipboard are still in the *Repository* work area. They are displayed additionally in the *Clipboard* work area. The *Delete* function in the *Clipboard* work area has the same effect as in the *Repository* work area, i.e. the document is removed from the *Repository* work area.

To remove entries from the *Clipboard* work area, use the *Remove from Clipboard* function. You will find the *Remove from Clipboard* function on the ribbon (*View > Navigation*) or in the context menu.

'In use' work area

The *In use* work area displays all the documents and folders you have checked out for editing. The chapter *Edit entries* explains how to check out and edit entries.

Navigation and display are the same as in the *Repository* work area.



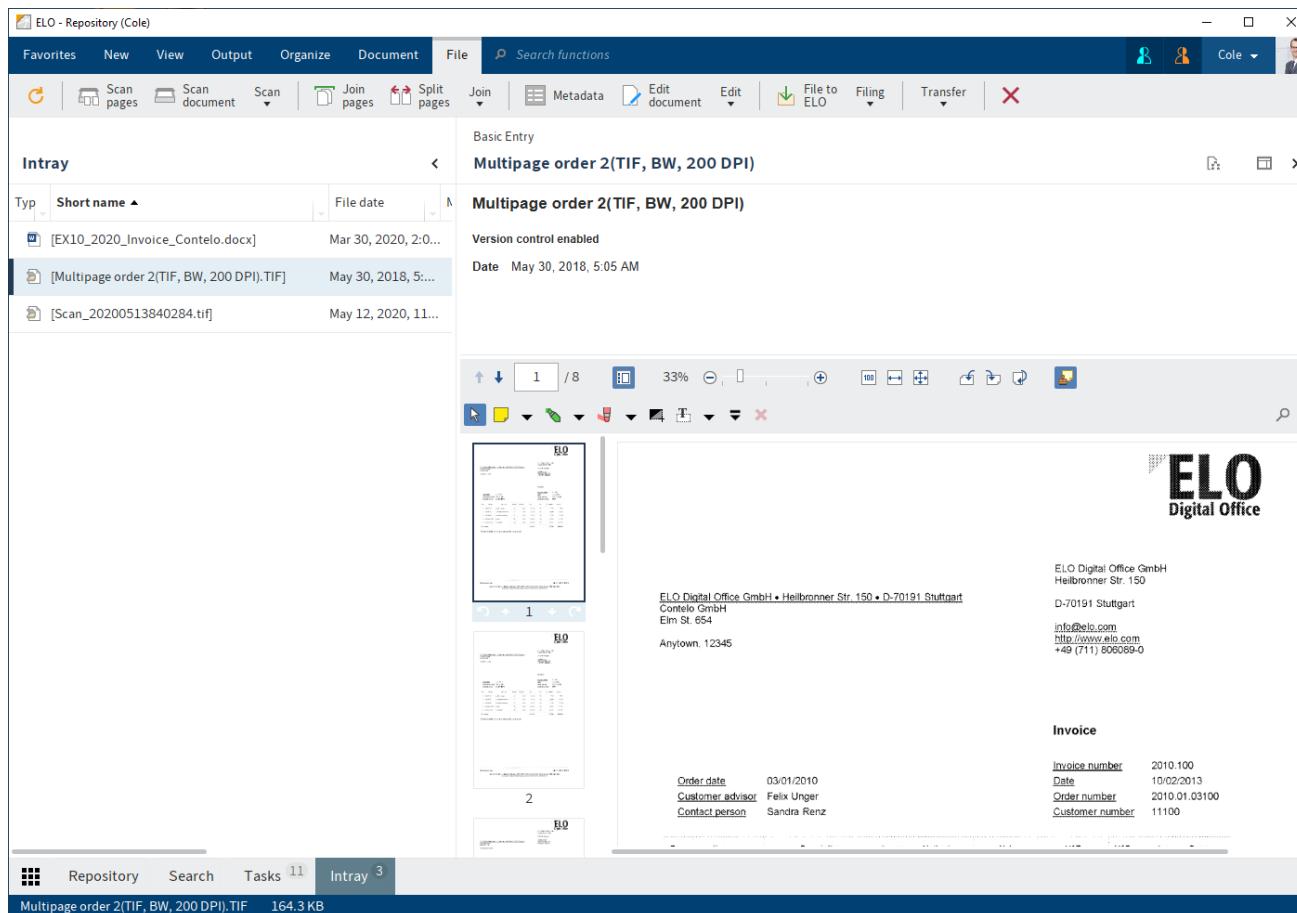
Entries in the *In use* work area are locked for all other users. The editor is displayed in square brackets before the name of the checked out entry in the *Repository* work area.

To transfer checked out entries back to ELO, you must check the documents in (*Ribbon > Document*). Once you check an entry back in or cancel editing, it automatically disappears from the *In use* work area.

'Intray' work area

The *Intray* is the central work area for incoming documents. You can drag any document into the *Intray* work area. Documents are usually filed to the ELO repository via the *Intray* work area. Other documents are dragged and dropped directly to ELO.

Before you file documents to ELO from the *Intray* work area, you need to enter metadata for the documents. You can also apply metadata automatically. Alternatively, you can specify the filing location in a dialog box every time you file a document.



You will find the scan functions in the *Intray* work area. Scanning is an important medium for filing documents to ELO.

When you open the *Intray*, the *File* tab appears on the ribbon. The *File* tab contains functions for scanning, inserting, organizing, filing, and applying metadata to entries.

Please note

Documents in the *Intray* work area are not yet stored in ELO. The documents are located in a special directory on your local computer. If you use ELO on different computers, the content of the *Intray* work area differs from computer to computer. You cannot access documents in the *Intray* work area of another computer.

For more information, refer to the chapters Scan a document to the Intray and file it and 'File' tab.

Spaces

Spaces are areas where you can collaborate with other users. You can file new entries and work on them with members of the space.

Workspaces are workspaces in ELO for different functional levels. With the help of filters and different views, you can edit data and analyze it in charts and tables.

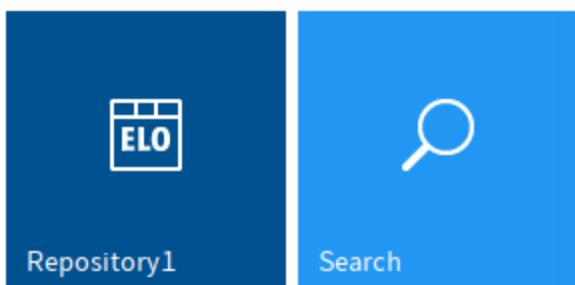
The *Teamspace* function enables you to collaborate across teams. All ELO users added to a teamspace can gather and edit documents together and exchange information using the feed.

For more information, refer to the Workspaces and Teamspaces chapters.

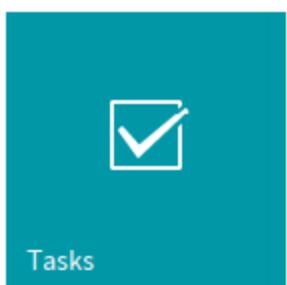
This section explains how you can access spaces.

Favorites New View Output Organize

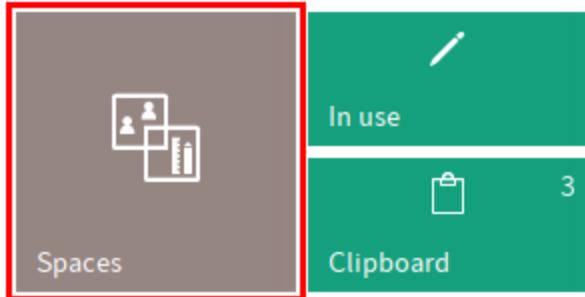
▼ Repository



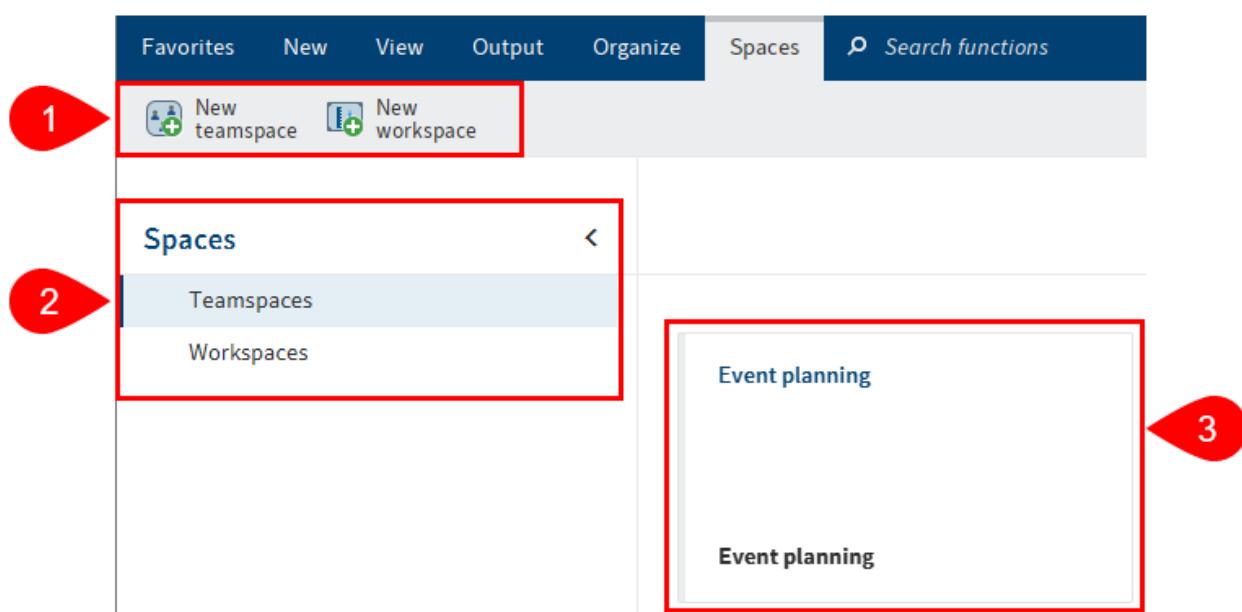
▼ Tasks



▼ Other



You can find the spaces in the *My ELO* work area via the *Spaces* tile. In this area, you see all spaces that you are a member of.



In the overview of spaces, you have access to the *Spaces* tab.

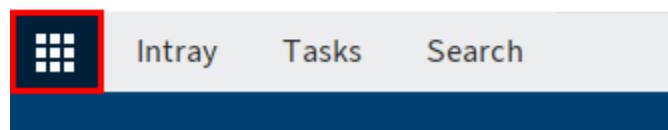
You have the following options:

- 1 Create a new teamspace or a new workspace: If these buttons are disabled, there are no teamspace templates or workspace types available for creating new spaces.
- 2 Switch between the teamspaces and workspaces
- 3 Navigate in a teamspace or workspace: They are shown as tiles and sorted by creation date.

'My ELO' button



➤ Hidden tiles



Click the *My ELO* button to open the *My ELO* work area. The *My ELO* button (tile icon) is locked in the navigation bar and cannot be removed from it.

Information

Alternatively, you can use the keyboard shortcut CTRL+Windows to open the *My ELO* area.

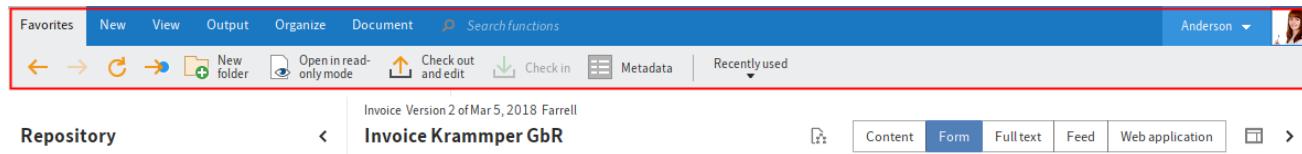
Here, you will find your news and most recently used entries, as well as the tile navigation.

If *My ELO* is highlighted in green, this means you have news in *My ELO*.

For more information, refer to the chapter '['My ELO' work area](#)'.

Ribbon

The ribbon provides access to different functions in ELO.



Information

Some functions can also be run from the context menu. Right-click an entry in ELO to open the context menu.

Tabs

The ribbon is divided into tabs that group the functions. Use the tabs to switch between the menus. Some tabs are always shown (default tabs), while others only appear when the tab functions can be used (contextual tabs).

To improve usability, some tabs are only shown when needed. For example, the *File* tab is only shown when you are in the *Intray* work area.

The default tabs are:

- Favorites: This tab contains frequently used functions that you want to access quickly. You can add other functions.
- New
- Display
- Output
- Organize

The contextual tabs are:

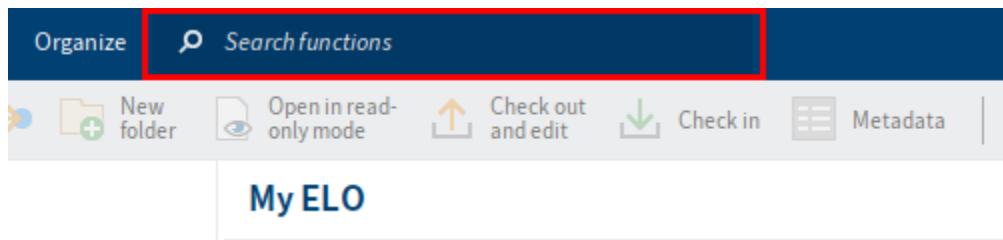
- Document: This tab appears when you select a document.
- Task: This tab appears when you click the *Tasks* work area.
- Search: This tab appears when you click the *Search* work area.
- File: This tab appears when you click the *Intray* work area.
- Copy/Paste: This tab opens when you click the *Copy* function.
- Reference: This tab opens when you click the *Reference* function.
-

- Move: This tab opens when you click the *Move* function.
- Attach pages: This tab opens when you click the *Move* function.

Functions

The functions are arranged logically by relation. The most important functions are pinned to the ribbon. Others can be found in drop-down menus. If a function is grayed out, you cannot use it at your current position in ELO.

Search functions



Use this field to search for functions on the ribbon. You can execute the functions by clicking them or by using the displayed path (e.g. *Organize//Structure*). Functions that are not available in the current context are grayed out.

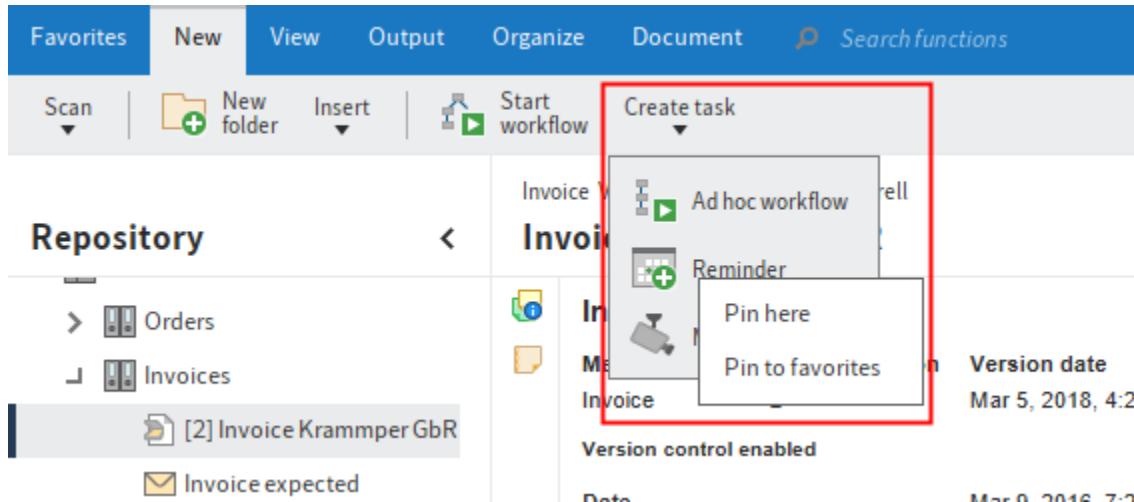
Customize the ribbon

There are different ways that you can personalize the ribbon:

- Pin/unpin functions
- Show/hide text
- Add/remove favorites

Pin/unpin functions

While many functions are directly visible on the ribbon, others are in drop-down menus. You can unpin functions from a drop-down menu and pin them to the ribbon.

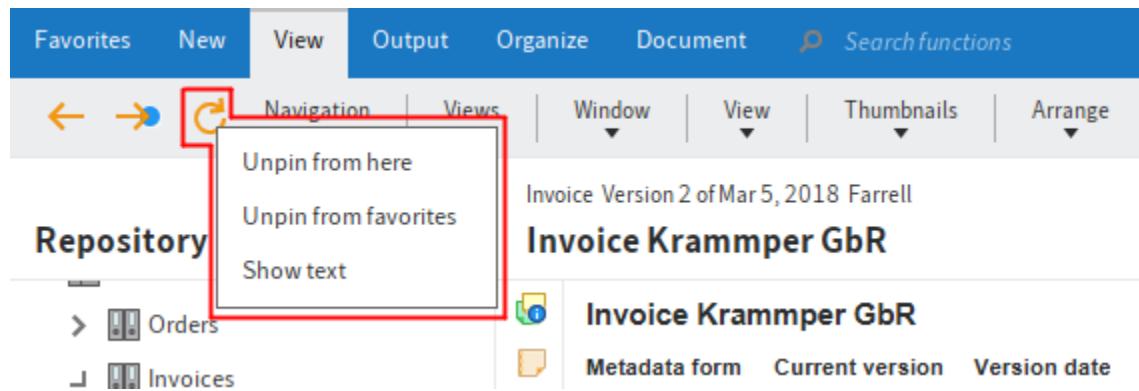


Right-click the desired function. The context menu opens. In the context menu, click *Pin here*. The function now appears on the ribbon.

To unpin a function from the ribbon, click *Unpin from here* in the context menu. The function is moved to the drop-down menu of the group.

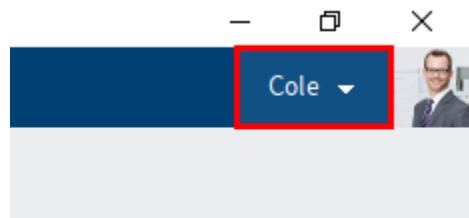
Show/hide text

Some functions are only displayed as icons on the ribbon. The name of the function is not shown. You can have the name displayed next to the icon. Right-click the desired function. The context menu opens. In the context menu, click *Show text*. The name of the function now appears on the ribbon.



To hide the name of a function, click *Hide text* in the context menu. The name of the function is no longer shown.

User menu [your name]



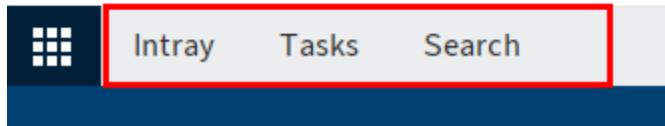
You will find the user menu under your name on the ribbon. The user menu provides access to the configuration where you can edit your profile or appoint a substitute, for example. You can also log off at the end of your session here.

For more information, refer to the chapter User menu [your name].

Navigation bar



› Hidden tiles

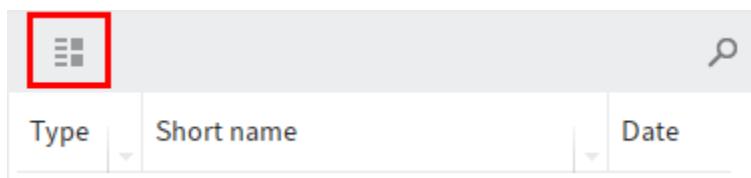


The navigation bar provides quick access to several areas and shows you which area you are currently in.

Hold down and drag with the left mouse button to move the individual areas on the navigation bar.

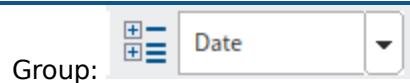
You can pin all areas available as tiles in *My ELO* to the navigation bar by right-clicking the tile.

Toolbar



You can change the display options of the entries via the gray toolbar. The following options are available depending on the work area you are in:

- Table: The entries are displayed as a table.
 - Restore table columns: Use this function to restore the default settings of the table columns in a work area. Manually set filters and sort orders are removed.
 - Copy table to clipboard: Use this function to copy the currently selected table entries to the clipboard. The entries can then be inserted into an external program, e. g. Microsoft Excel.
- List: The entries are displayed as a list.
 - Thumbnails: Use this function to enable a thumbnail view of the list of entries. You can use the slider to adjust the size of the thumbnails.
 -



Use this function to sort the list of entries in the list and tile view. Use the *Group* drop-down menu to select whether to group the list by *Date*, *Filing date*, *Type*, *Filed by*, or *Metadata form*.

The entries are grouped by categories, e. g. by the year in which they were filed. This function can be combined with the *Sort order (search results)* function.

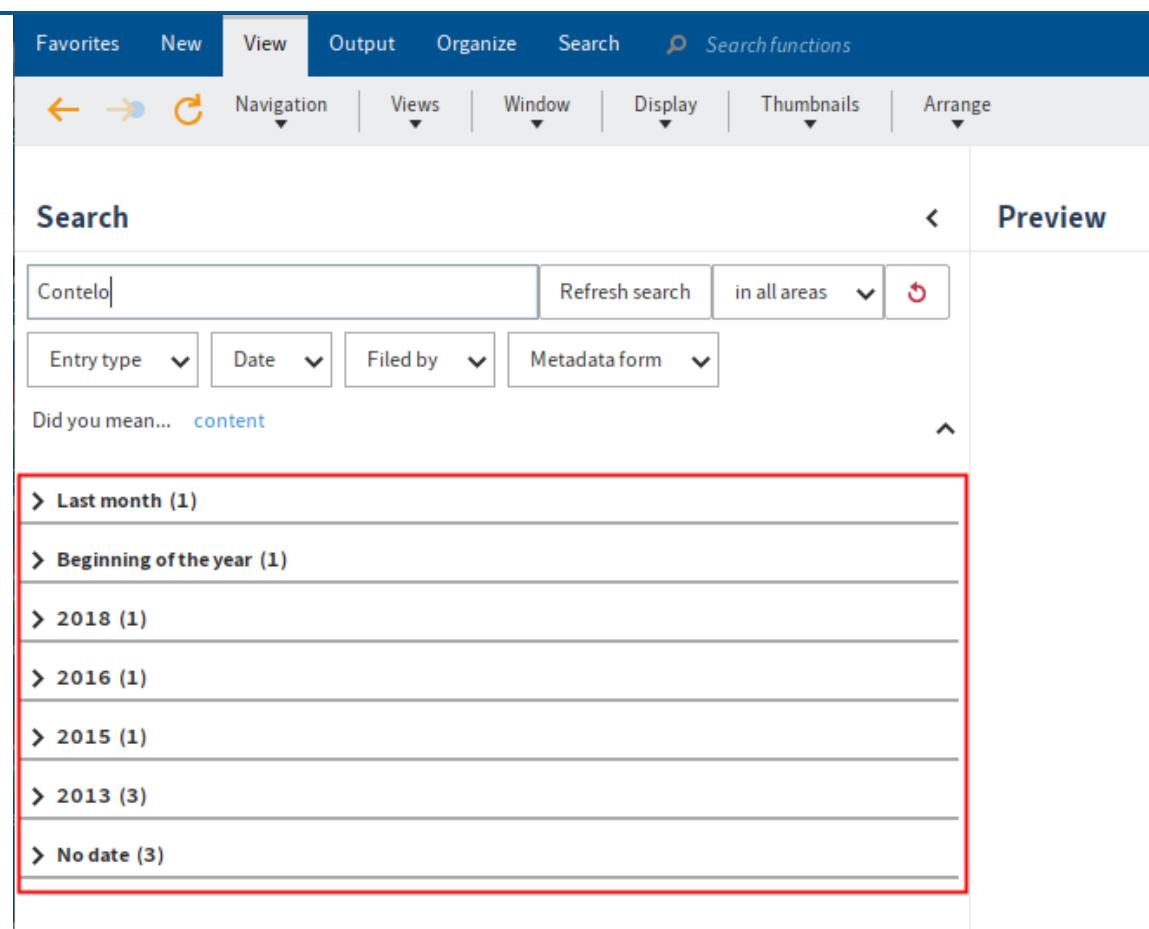


Use this function to sort the list of entries in the list and tile view in the *Repository* and *Search* work areas. In the *Sort order* drop-down menu, you can select whether to sort the list by *Date*, *Filing date*, *Type*, *Filed by*, *Short name*, or *Metadata form*. This function can be combined with the *Group* function.

- Expand/Collapse: Use this function to change how entries are displayed in the list and tile view in the *Repository* and *Search* work areas. You can select filter criteria for both views via the *Sort order* and *Group* drop-down menus. Use the *Expand/Collapse* function to switch between the view of the parent filter criteria and a view of the search results associated with the filter criteria.

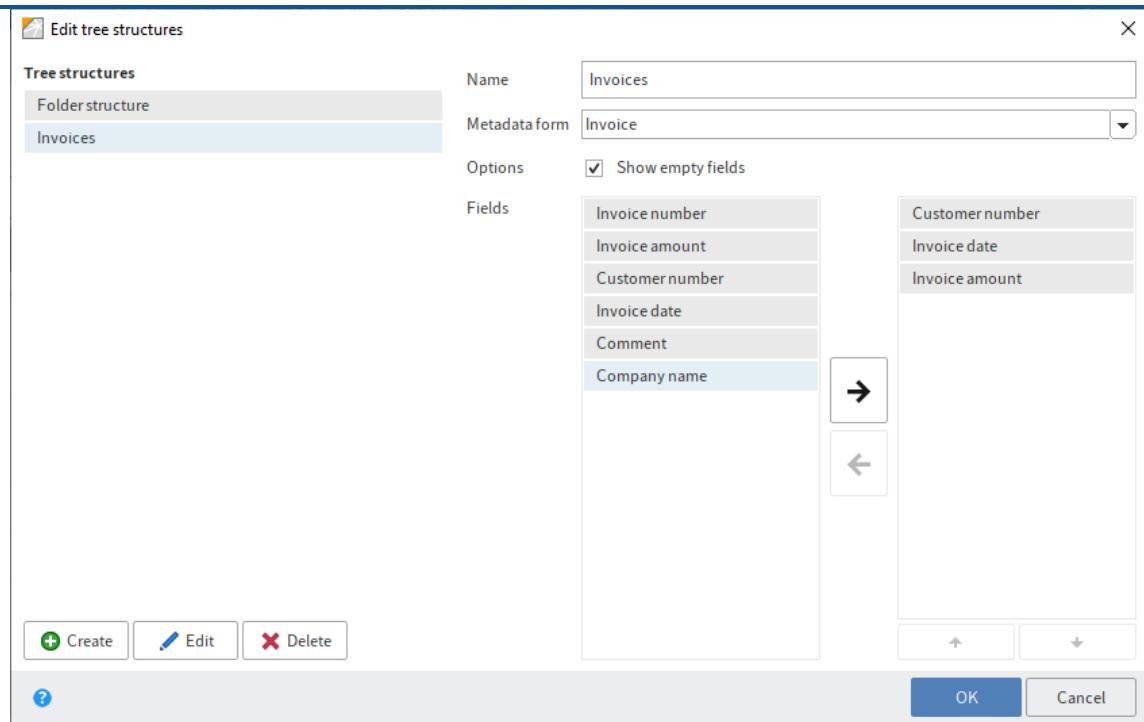
Information

The function is only enabled if the entries are displayed in a list or tile view. In addition, at least one *Group* filter criterion must be selected in the drop-down menu.



The screenshot shows the ELO Java Client interface with the 'Search' work area selected. The top navigation bar includes 'Favorites', 'New', 'View' (selected), 'Output', 'Organize', 'Search', and 'Search functions'. Below the navigation bar are buttons for 'Navigation', 'Views', 'Window', 'Display', 'Thumbnails', and 'Arrange'. The main search area has a search input field containing 'Contelo', a 'Refresh search' button, and a dropdown for 'in all areas'. Below the search bar are filters for 'Entry type', 'Date', 'Filed by', and 'Metadata form'. A suggestion 'Did you mean... content' is shown. The search results are displayed in a tree structure with a red border around it, showing categories like 'Last month (1)', 'Beginning of the year (1)', '2018 (1)', '2016 (1)', '2015 (1)', '2013 (3)', and 'No date (3)'.

-  Tiles: The entries are displayed as small tiles.
 - Thumbnails: See details under *List*
 - Group: See details under *List*
 - Sort order: See details under *List*
 - Expand/Collapse: See details under *List*
-  Tree (search results only): This function displays the search results in a tree structure. The tree structure is created according to the selected tree view. Use the *Edit tree structures* function to define different tree views. The tree structures offer various sorting options for documents displayed in the *Search* work area.
 - Edit tree structures: The *Edit tree structures* function enables you to change the tree view in the search. You can create and edit different tree structures. A tree structure enables you to specify which sections of the tree view to include in the search results. For example, you can sort the list of search results by customers.



The following options are available:

Name: Enter a name for the tree structure.

Metadata form: Select a metadata form from the drop-down menu.

Show empty fields: Enable this option to also see metadata fields that do not contain any information. These fields contain spaces.

Fields: Select the fields you want to use for sorting the results.

Use the *Add*, *Delete*, and *Edit* functions to create and edit tree structures.

Active substitutions



You can substitute for other users or be substituted for by others. You will recognize both of these cases based on the person icon.

- Orange person: A substitute is currently set for you.
- Blue person: You are currently substituting for at least one user.

Clicking the icon opens more information on your substitutions.

You will find more information here:

- Assign substitute
-

Accept substitution

Context menu

Right-click an entry to open the context menu. Alternatively, use the menu key of a selected entry.

The context menu contains selected functions that you will also find on the ribbon. The context menu can contain different functions depending on the work area you are in.

You can add functions to or remove functions from the context menu in the configuration (available in: *User menu [your name] > Configuration > Quick access to functions*). For more information, refer to the chapter 'Favorites' tab. The method for the context menu is the same as for the *Favorites* tab.

Navigation and use

This chapter provides information about the general use of the ELO Java Client. You can find information on specific actions in the chapters about the actions or the tabs.

Navigating between work areas

To switch from one work area to another, you have the following options:

- My ELO: Click the *My ELO* button to switch to the desired work area using tiles. This option is always available.
- Navigation bar: Click the desired work area right in the navigation bar. This option is only available if the work area tile is pinned to the navigation bar or you have pinned it as described in the chapter 'My ELO' work area.
- Define keyboard shortcuts: You can define keyboard shortcuts that allow you to open a work area or switch to another work area under *Ribbon > User menu [your name] > Configuration > Quick access to functions*. When switching to the next work area, the program starts with *My ELO* and then follows the order of the work areas as defined in the tile navigation.

Use functions

Functions can only be selected if they can be used in the current context. Otherwise, they are grayed out or are not displayed at all. Most functions are contextual. To use them, you must establish a reference to an entry (folder or document) by selecting it. Once you have selected the entry, click the function or use the corresponding keyboard shortcuts. In most cases, this opens a dialog box or another control element with instructions on how to proceed.

There are a few functions that are not contextual and can be used at any time. These functions are not related to selected entries, such as *Assign substitute* or *Refresh*.

Select multiple entries

In some contexts, you have the option to select multiple entries.

If you want to select several entries that are not directly below one other, press the CTRL key and click on the entries one after the other.

If you want to select several entries that are directly below one other, press the SHIFT key and click on the first and the last entry.

Information

In the tree navigation in the *Repository* work area, you can only select one entry at a time.

Keyboard shortcuts for quick selection

You have the option to quickly navigate to folder entries in the repository.

Method

1. Open the folder in the tree view and set the focus on the folder.

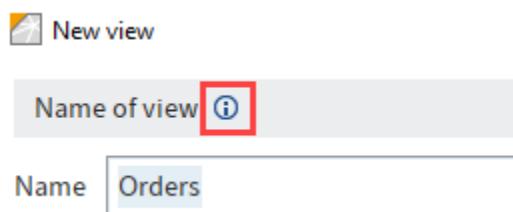
Alternative: Select an entry in the viewer pane of the folder.

2. Type in the first letters of the entry name.

The first entry that starts with these letters is selected. If the first entry that is selected isn't the right one, you can navigate to it with the ARROW keys.

Open ELO in-program help

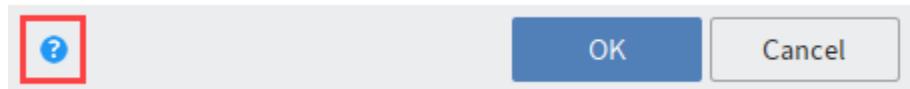
There are different ways to use the in-program help functions in the ELO Java Client.



In many dialog boxes, you will see an info icon next to the name. If you mouse over the info icon, you will see a detailed explanation of the function.

If you require additional information, you can also refer to the ELO documentation. The following options are available:

- Press the F1 key.
- Click the question mark icon in dialog boxes.



- Open the in-program help under *Ribbon > User menu [your name] > Help*.

Simple operation

Contrast settings

There are four display modes in the ELO Java Client. The ELO Java Client also has a dark mode as well as a light and a dark contrast mode. The high contrast modes are an accessibility feature.

You can find more information in the section Color scheme.

Information

How documents are displayed in the viewer pane depends on the settings of your desktop programs.

Keyboard control

You can largely operate the ELO Java Client using the keyboard.

Use the TAB and arrow keys to navigate. TAB + SHIFT returns the focus to the previously selected element.

Use the ALT key to go to the ribbon.

To select functions, tiles, and entries, use the SPACE bar and ENTER key.

Keyboard shortcuts

You can switch to certain areas and access functions using keyboard shortcuts. The following tables contain an overview of the keyboard commands you can use.

You can adjust the keyboard shortcuts in the configuration. For more information, refer to the chapter Assign keyboard shortcuts to functions.

Information

The keyboard shortcuts to open the in-program help and the configuration cannot be changed.

General

Function	Keyboard shortcut Note
<i>My ELO work area</i>	CTRL + WINDOWS
<i>Repository work area</i>	CTRL + 1
<i>Search work area</i>	CTRL + 6
<i>Tasks work area</i>	CTRL + 4

Function	Keyboard shortcut	Note
Clipboard work area	CTRL + 3	
In use work area	CTRL + 5	
Intray work area	CTRL + 2	
Help	F1	invariable
Configuration	F12	invariable
About	CTRL + I	
User feedback	F11	
Close	CTRL + Q	

Functions

Function	Keyboard shortcut
Metadata	F4
Refresh	F5
Print document	CTRL + P
Send document	CTRL + M
Open in read-only mode	CTRL + O
Check out and edit	ALT + O
Edit document	CTRL + E
Check in	ALT + I
Document from template	CTRL + N
Create a new view	ALT + N
Delete	CTRL + DEL
Save as	CTRL + S
Search metadata	CTRL + F
Search on the ribbon	ALT + M
Collapse/expand ribbon	CTRL + F1
Start ad hoc workflow	CTRL + W

'Repository' work area

Function	Keyboard shortcut
Navigate in the tree view	UP ARROW or DOWN ARROW
Open folder	RIGHT ARROW
Close folder	LEFT ARROW

'Intray' work area

Function Keyboard shortcut

Join pages CTRL + K

Split pages CTRL + T

'Metadata' dialog box

Function	Keyboard shortcut	Note
Enter metadata using the most recently saved/displayed entries	F3	
Open keyword list	F7	Only for fields with keyword lists.
Pin entry to field	F8	Only in the Intray.
Use last entry	F9	
Expand keyword list automatically	CTRL + K	
Undo last action	CTRL + Z	
Redo the last undone action	CTRL + Y	
Insert pilcrow character (¶) as a separator	CTRL + P	Only in input fields and keyword lists.
Load metadata	CTRL + L	
Save metadata	CTRL + S	

Logon dialog box

Function Keyboard shortcut

Profiles CTRL + P

Important components

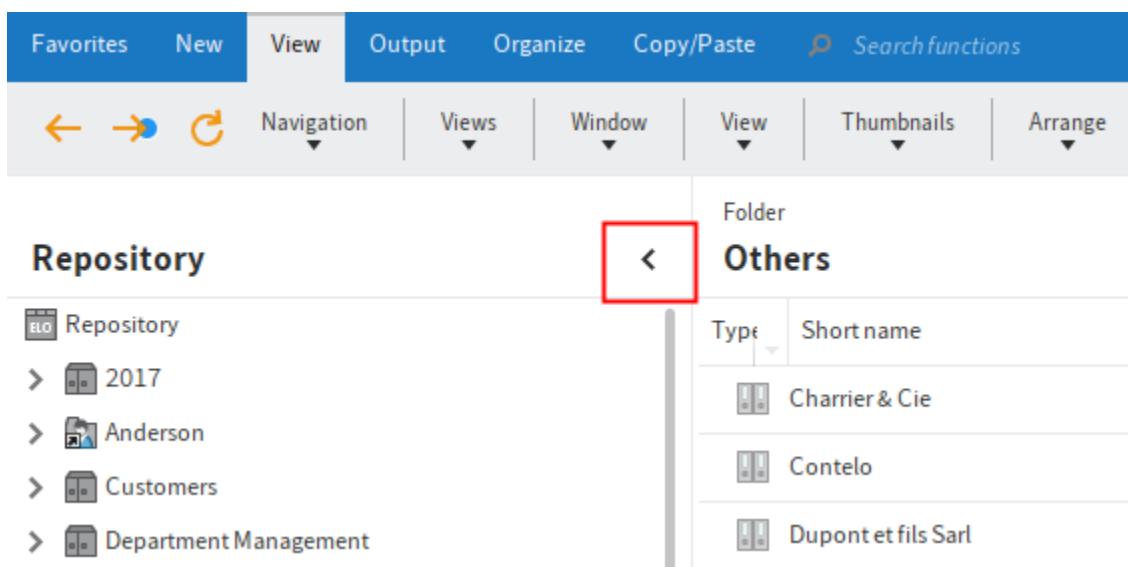
Repository structure

Navigate between entries in the repository structure.

You have the following navigation options:

- Mouse: Click an entry using the mouse. If you click a folder, you will see the contents of the folder in the [viewer pane](#). Clicking the arrow next to the folder expands the contents of the folder in the tree.
- Keyboard: You can navigate up and down the tree using the UP and DOWN arrow keys. Pressing the right arrow key opens a folder. Pressing the left arrow key closes the folder.

Minimize/maximize navigation



This function minimizes or maximizes the tree structure, or the tree structure and table view depending on the layout you have selected.

Change layout

You can change the layout of the repository structure in the *Repository* functional area.

You will find the layout settings on the *Ribbon > User menu [your name] > Configuration > Display > Layout options*.

You see which layout is currently selected under *Layout options*. Select the corresponding radio button to switch to a different layout. Click *OK* to apply the changes.

The following layouts are available for displaying folders and documents in the *Repository* work area:

-

- Tree only
- Tree and table

Tree only

The screenshot shows the ELO Java Client interface with the 'Tree only' option selected. The left sidebar, titled 'Repository', contains a tree structure of documents and folders. A red box highlights this sidebar. The main viewer pane displays a document titled 'Letter - Renz Note' by Sandra Renz, dated October 10, 2013. The document content is as follows:

E-mail Version 5 of Mar 21, 2018 Cole

Letter - Renz Note

Sandra Renz
12 Seacrest Drive | 79999 Hamburg

Altustrics Inc.
600 Outremer St.
River port, LA 19384

October 10, 2013

RE: Office furniture tender

To whom it may concern:

I wish to thank you greatly for the prompt delivery of the offer in regards to the purchase of office furniture. I would also like to request the delivery and setup of the office furniture discussed in tender no. 2013/1234. Additionally, I would request that the delivery and setup be completed by November 30, 2013. Minor additional work and subsequent deliveries may, of course, be completed after this date.

Thank you in advance for your assistance!

Sincerely,

Sandra Renz

Bottom navigation bar: Repository, Search, Tasks

File status: 18.8 KB

Page footer: Repository // Documentation // Sample documents // [6] [Administrator] Letter - Renz Note

If the *Tree only* option is selected, the repository or selected view is displayed as a tree structure on the left-hand side of the screen. The selected document or content of the selected folder is displayed in the viewer pane.

Tree and table

The screenshot shows the ELO Java Client interface with the 'Tree and table' option selected. The left pane, titled 'Repository', contains a tree view of various document types and their sub-items. A specific folder, 'Sample documents', is highlighted with a red border. The right pane displays a detailed view of a selected document, 'Letter - Renz Note'. This view includes a table with metadata like 'Metadata form: E-mail', 'Current version: 5', 'Version date: Mar 21, 2018, 2:16 AM', 'Editor: Cole', and 'Comment: Version control enabled'. Below the table, the document content is shown, including recipient information ('Sandra Renz, 12 Seacrest Drive | 79999 Hamberg'), a company address ('Altustrics Inc., 600 Outremer St., River port, LA 19384'), and a date ('October 10, 2013'). The document body starts with 'RE: Office furniture tender' and continues with a message to the recipient.

Metadata form	Current version	Version date	Editor	Comment
E-mail	5	Mar 21, 2018, 2:16 AM	Cole	Version control enabled
Date: Mar 21, 2018, 2:16 AM				
<p>Sandra Renz 12 Seacrest Drive 79999 Hamberg</p> <p>Altustrics Inc. 600 Outremer St. River port, LA 19384</p> <p>October 10, 2013</p>				
<p>RE: Office furniture tender</p> <p>To whom it may concern:</p> <p>I wish to thank you greatly for the prompt delivery of the offer in regards to the purchase of office furniture. I would also like to request the delivery and setup of the office furniture discussed in tender no. 2013/1234. Additionally, I would request that the delivery and setup be completed by November 30, 2013. Minor additional work and subsequent deliverys may, of course, be completed after this date.</p> <p>Thank you in advance for your assistance!</p>				

If you enable the *Tree and table* option, you will only see folders in the tree structure. The content of the selected folder is displayed in a separate table on the right. The document selected in the table is shown in the viewer pane.

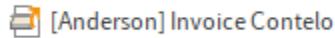
Reference

EX10_2018-12-13_Invoice_Gruber

invoice received

Entries (folders or documents) with an arrow icon are references. A reference is a link between a copy of an original document. The document only exists once physically in ELO. Clicking the function *Go to* (available in: *Ribbon > View*) takes you to the original entry.

Checked out document



Documents with a yellow arrow next to the document icon and a name in brackets are checked out by the corresponding user. They can be viewed (*Document > Open in read-only mode*) but not edited.

You can learn how to check out and edit documents in the chapter *Edit entry*.

Folders

Type	Short name	Date	Filed by	Version
W	99 Sample ELO Script	Jun 3, 2020, 1:02 AM	Cole	1
E	[Anderson] Invoice Contelo	Nov 25, 2013, 12:00 PM	Administrator	
PDF	Offer-EX10_Zastry_2016-540	Jun 3, 2020, 12:48 AM	Cole	1
PDF	Offer-EX10_Zastry_2016-540	Apr 12, 2016, 1:21 PM	Administrator	1
PDF	Offer-EX10_Zastry_2019-445	Apr 12, 2016, 1:20 PM	Administrator	1
E	Scan_20200511578504	Mar 5, 2018, 1:19 PM	Administrator	2

If you have selected a folder, you will see the child folders and documents within it. You have the following options:

- You can change how the folder is displayed and the sort order (1), or browse the folder by short name (2). You will find more information about the display options in the chapter *Toolbar*.
- Press the CTRL or SHIFT key and click the entries to select multiple entries. This is not possible in the tree.

Document

If you have selected a document, the document will be displayed on the *Content* tab, if this is possible. If the document cannot be displayed, you can save it (*Ribbon > Output > Save as*), open it in read-only mode (*Ribbon > Document > Open in read-only mode*), or switch the view as described in the following.

You have the following options for showing the contents of a document:

-

- Original document: Automatic if no other option is selected.
- Image preview: Image preview for formats, e. g. JPG, TIFF, PNG
- Full text: If available via the *Full text* tab

Text view ('Full text' tab)

The ELO Java Client offers additional control elements in the viewer pane for displaying images (formats: JPG, TIFF, PNG, etc.) and text files (formats: TXT, HTML, JS, etc.) or the full text contents of documents. The text view is used to display the full text information of documents that have been added to the full text database. You can also configure this view for documents with specific file extensions.

The text view/full text view has a menu bar with the following functions, which are displayed depending on the file format:



Decrease or increase font size: Decreases or increases the size of the displayed text.



Fixed font width: Switches the display to a non-proportional font so that all characters are displayed with the same spacing. This improves readability, e.g. of code.



Automatic word wrap: Lines are wrapped automatically.



Search document: Search for a term in the full text. The matches are highlighted. Click the X icon to reset the search.



Show previous or next hit: Jumps to the previous or next highlighted entry in the text.

Information

Full text view in the search results: If you have selected a document in the search, the parts of the documents that match the search text are automatically highlighted in the full text preview. The search field is not displayed.

Use the arrow icons to display the next or previous match in the text.

Information

You can add the function *Show full text database content* to the *Favorites* tab and the context menus via: *Ribbon > User menu [your name] > Configuration > Quick access to functions*. This function allows you to see the full text information of a selected document. You can learn how to add the function in the chapter 'Favorites' tab.

Image preview ('Content' tab)

The ELO Java Client offers additional control elements in the viewer pane for displaying images (formats: JPG, TIFF, PNG, etc.) and PDF documents. You can also set this as the display mode for documents with specific file extensions.



Next or previous page: The next or previous page of a multi-page document is displayed.

Information

You can change the order of pages in a TIFF document with multiple pages. You will find more information here: [Move pages](#).



Show thumbnails of pages: If you select this option, the pages of documents with multiple pages are displayed as thumbnails. Click on a thumbnail to go to the page.



Zoom in or zoom out: Increases or decreases the size of the image shown.



Zoom to 100%: The image is displayed in the original size.



Fit image width to the frame: The image size fits the width of the viewer pane.



Fit image size to the frame: The image is adjusted to the height of the viewer pane so that the entire page of the document is displayed.



Rotate document: Rotates the document 90 degrees or 180 degrees. You can save the rotated document as a new version.



Show annotations: You can see the annotations that have been applied to the document. Annotations can be sticky notes, text notes, stamps, or markers.



Add annotations: You can attach sticky or text notes to the document, mark text passages, or apply stamps. For detailed information on how to apply annotations, see the chapter Add annotations.



Search document: Search the contents of a document. ELO begins to search as soon as you start typing and highlights any matches in green.

If the document contains multiple matches, use the arrow icons next to the search field to skip through the matches. In this case, the currently selected match is highlighted in red.

Click the X icon to the right of the search field to reset the search.

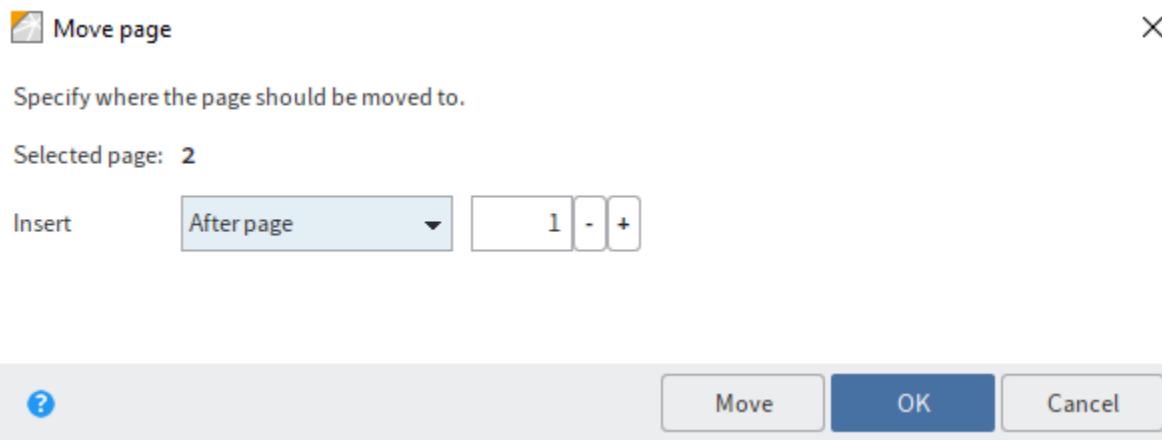
Move pages

You can change the order of pages in a TIFF document with multiple pages.

1. In the viewer pane, go to the page that you want to move.



2. Select the *Edit pages* button (pencil icon, 1).
3. Select the *Open editing menu* button (icon with three dots, 2).



The *Move page* dialog box opens.

- 4.

In the drop-down menu, select where in the document you want to move the selected page to. Choose from the following options:

- After page or Before page: Use the spin box to specify after or before which page you want to insert the selected page.
- As first page or As last page: The selected page is moved to the beginning or end of the document.
- Move: To move the selected page without closing the dialog box, click *Move*.

5. Click *OK* to move the selected page and close the dialog box.

Viewer pane

In the viewer pane, you will see the most recently selected entry ([folder](#) or [document](#)).

The screenshot shows the ELO Java Client interface with the 'Meeting notes' entry selected. The entry details are as follows:

Customer/project: XX	Author: XX	Meeting date: XX
Place: XX	Start: XX	End: XX

Topic: XX

The sidebar on the right shows the following activity feed:

- Anderson saved a new working version of this document. Version 2. Jun 2, 2020, 3:36 PM. Comment.
- Anderson filed a new document. Version 1.

Each entry is made up of different elements. Use the tabs to switch between the elements. The most important elements are:

- Content: If you have selected a [folder](#), you will see the child folders and documents within it. If you have selected a [document](#), the document will be displayed, if this is possible.
- [Metadata/Form](#): Displays either the metadata or the form associated with the entry.

Information

If the entry was stored with a gen. 2 metadata form, you can edit the entry directly in the viewer pane. Click the floppy disk icon to save the changes.

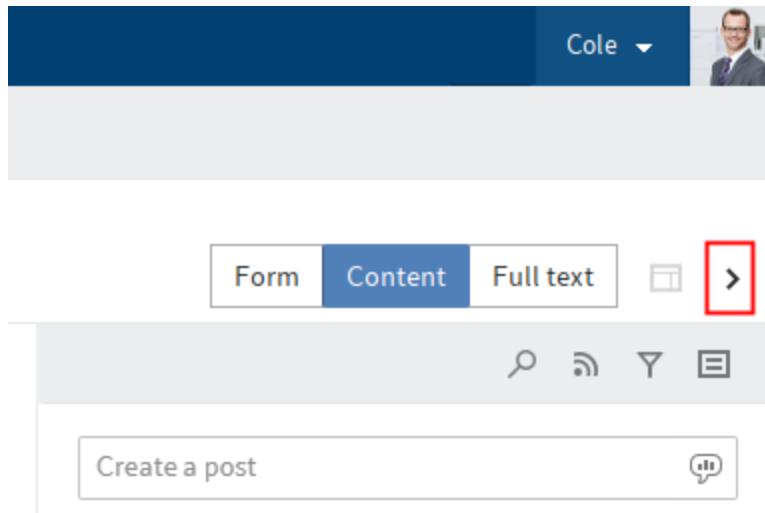
Depending on the configuration, some parts of the form may appear collapsed. To expand a part of the form, click the arrow to the left of the header.

•

[Feed](#): The feed is used to share information on an entry in ELO (document or folder) and track changes.

Maximize/minimize viewer pane

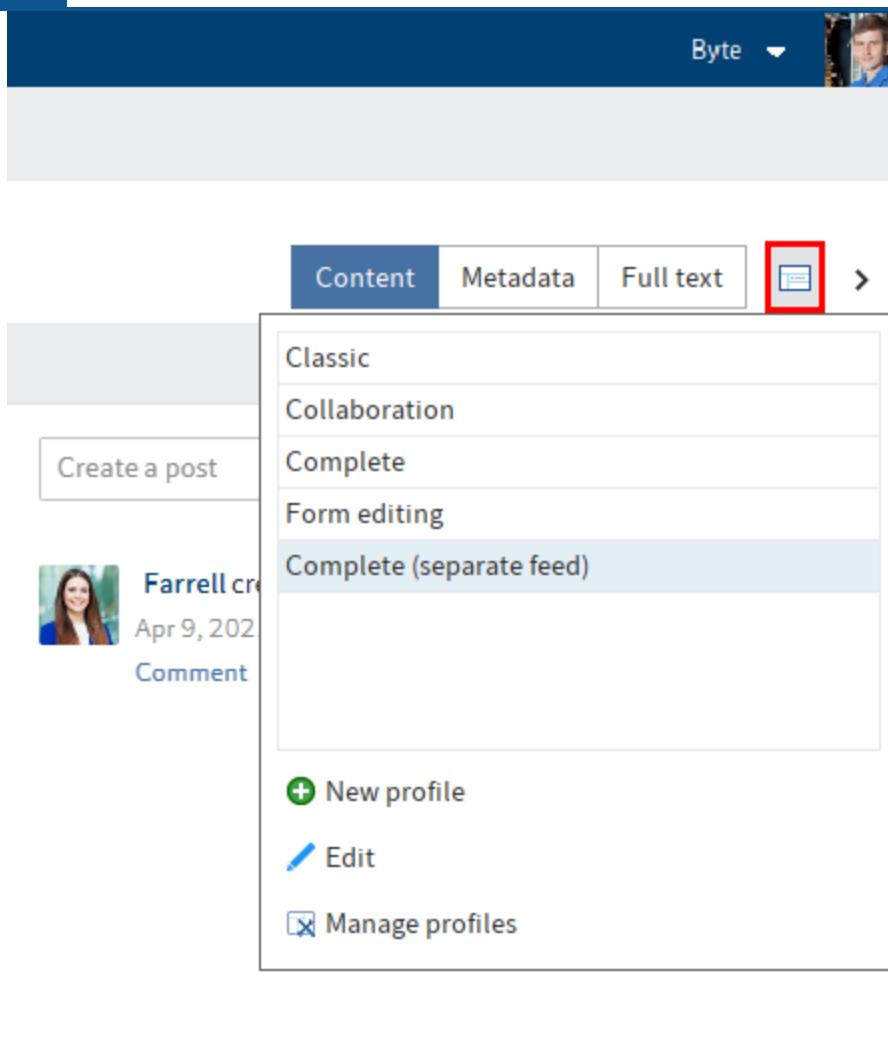
This function minimizes or maximizes the viewer pane.



With the default settings, content and metadata are shown on the left, while the feed is located on the right. You can change the layout arrangement by creating new view profiles.

View profiles

To define the settings for the viewer pane, you need to define a view profile. The button for opening the *Select and configure view profiles* menu is located directly below the ribbon on the right-hand side of the screen.



Create view profile

1. Click the *Select and configure view profiles* button.

A drop-down menu appears.

2. Click *New profile*.

The client switches to the mode for creating a new view profile.

In the viewer pane, you see the view elements and four panes which you can assign view elements to. The following elements are available:

- Web application
- Full text
- Metadata/Form
- Feed
-

Contents

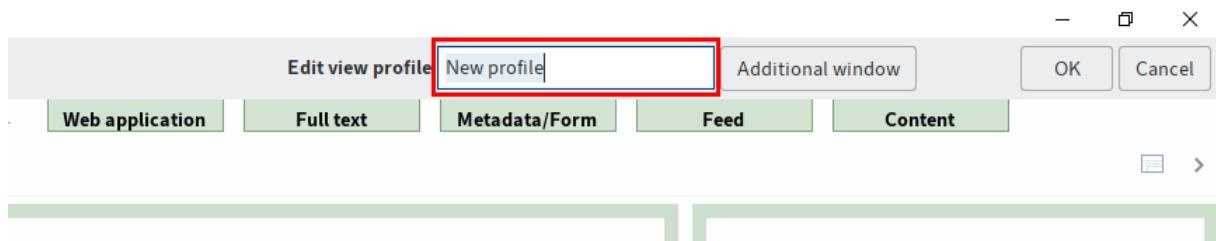
3. Drag a view element to any pane and release the mouse button.

The view element is assigned to the pane.

Information

Try out the different viewing options. The size of the panes is adjusted automatically.

Optional: You can also assign multiple view elements to a subpane. In this case, the individual view elements are displayed as tabs. You can change the order of the tabs.



4. Enter the name of the view profile in the *Edit view profile* field.

Optional: Click the *Additional window* button to open the *Viewer pane* dialog box. In this dialog box, you can see what the view elements would look like. To do so, drag the desired view element onto the *Preview* dialog box.

Please note

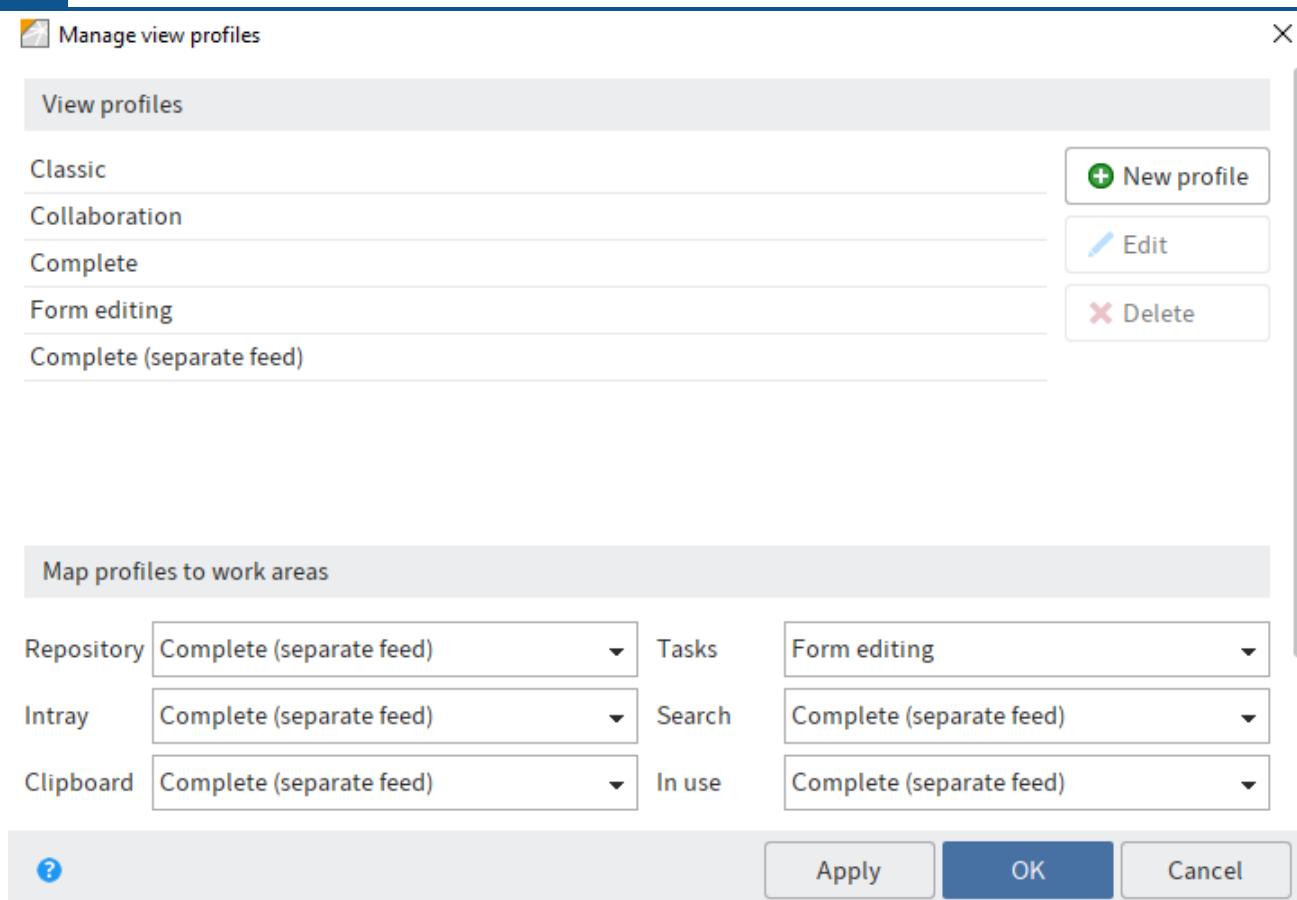
The settings you make in the *Preview* dialog box are not applied to the view profile.

5. Click *OK* to save the view profile.

The new view profile is created.

Manage view profiles

The *Manage profiles* function enables you to edit and delete existing view profiles, and assign them to individual work areas. You can access the function via *Select and configure view profiles > Manage profiles*.



The *Manage view profiles* dialog box opens.

The settings for managing the existing view profiles are in the top part of the dialog box.

New profile: This opens a dialog box for creating a new profile. Arrange the viewer panes by dragging the rectangular preview modes (full text, form, content, feed, web application).

Edit: Open a selected view profile for editing in the *View profiles* list.

Delete: Click *Delete* to remove the selected view profile. The view profile is initially marked red. The view profile is deleted once you close the dialog box via the *OK* button. If you close the dialog box with the *Cancel* button, the delete action is reversed.

Map profiles to work areas

You can map a view profile to a work area. Select a view profile for each work area in the drop-down menus.

Map profiles to metadata forms

You can map a view profile to a metadata form. Select a metadata form in the drop-down menu on the left and map it to a view profile in the drop-down menu on the right.

New: Click the *New* button to add a new metadata form.

Delete: Click the *Delete* button (X icon) to remove the metadata form.

Metadata

Before you can file documents to ELO or create new folders, you must enter metadata for the entries. This is done by using metadata forms, which contain corresponding input fields (called *fields*).

The *Metadata* dialog box is used to enter and edit the metadata. Unless you have a different configuration, the dialog box appears automatically when you file a document or create a folder.

For detailed information, refer to the chapter Metadata.

Feed

The feed is used to share information on an entry in ELO (document or folder) and record changes to the entry. New feed posts are denoted with a green dot.

You can find the folder or document feed in the viewer pane.

Feed posts for different entries are listed in the *My ELO* work area. This applies to feeds such as those that a user has subscribed to or in which they are mentioned by another user. You will find additional functions in the *My ELO* feed. For more information, refer to the chapter 'My ELO' work area.

The screenshot shows the ELO Java Client interface with a blue header bar. On the left is a dark blue sidebar with a user icon and the name "Santini". The main area has a light gray background. At the top right are tabs: "Content" (highlighted in blue), "Form", and "Full text". Below them is a toolbar with icons for search, refresh, filter, and more. A "Create a post" button is visible. The feed displays three items:

- Santini** saved a new version of the document.
A thumbnail of a document page titled "Version 2" with the text "List updated".
a minute ago
[Comment](#)
- Cole**
@GRP_SALES Put your names on the list for the office party #officeparty
3 minutes ago
[Comment](#)
- Cole** filed a new document.
A thumbnail of a document page titled "Non-deletable Version 1".
27 minutes ago
[Comment](#)

The following message types are shown in the feed:

- Posts (written by a user)
- Comment (on a post)
- Polls
- Events (e. g. when a new version of a document is filed or changes are made to the working version)

Feed posts are marked with the name and profile image of the author. You can read how to edit your profile in the chapter Edit profile.

To view another user's profile, click on the profile image or the user name.

Create post/comment

The feed enables you to write posts related to entries in ELO and comment on posts uploaded by other users. Enter your post/comment in the respective input fields. Click *Create* to upload the post/comment.

The icons below the input field provide you with additional tools for your post/comment. You have the following options:

Mention

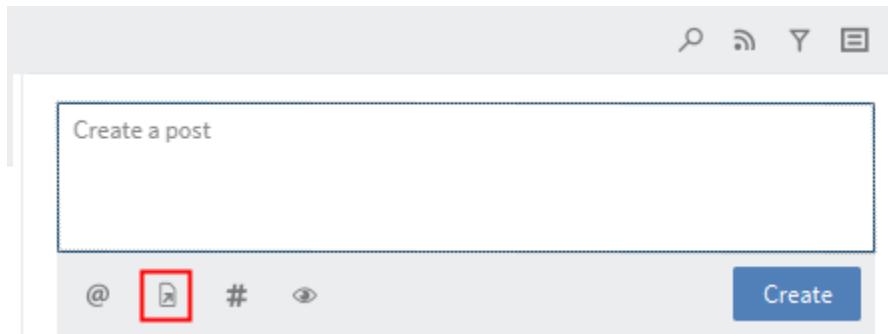


Use the *Mention* button (@ icon) to address a feed post directly to another ELO user or an ELO group. The users mentioned can see the corresponding feed post in their *My ELO* work area.

Alternative: As soon as you type an @ character, ELO automatically recognizes that you want to insert a mention. The *Mention* dialog box appears.

In the *Mention* dialog box, select one or more users or groups. If you select a group, you will see the group members in the *Members of the group* column. Double-click the corresponding user in the *Members of the group* column to select a member of a group. If you click the *Expand* button, groups are not displayed as a group. Instead, the individual members of the group are listed.

Reference



Use the *Reference* button (document icon with arrow) to link a feed post with an entry in ELO. Clicking the reference automatically takes the user to the filing location of the linked entry.

Alternative: As soon as you type a > character, ELO automatically recognizes that you want to insert a reference. The *Reference* dialog box appears.

In the *Reference* dialog box, select the entry in the repository tree you want to reference.

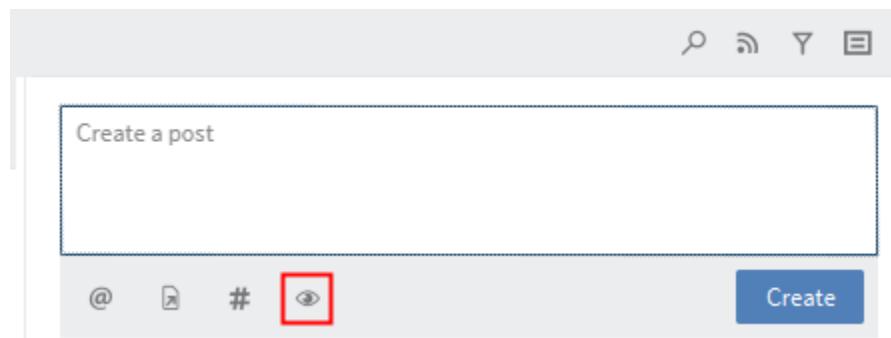
Hashtag



Use the *Hashtag* button (# symbol) to add hashtags to a post. Users can subscribe to hashtags. You can also filter the *My ELO* work area by hashtags.

Alternative: As soon as you type a # character, ELO automatically recognizes that you want to insert a hashtag.

Visibility



The *Visibility* button (eye icon) enables you to restrict who can read your post. You can apply this restriction for future feed posts. Click the *Remember selected visibility* option. Your visibility settings will be set as the default for new feed posts.

Information

You cannot change the visibility settings of a comment. The visibility settings of the post you are commenting on apply.

Format text as bold

Bold: To format a part of the text in bold type, place an asterisk (*) at the beginning and end of the desired text section.

Example

I would like to emphasize this *again*. will appear in the ELO feed as follows: "I would like to emphasize this again."

Information

If you want the asterisk to appear as a character in the text, enter a backslash (\) before the asterisk. The asterisk does not have a formatting function.

Poll



Clicking the *Create poll* button opens a new area in the ELO feed in which you can start a user poll.

Enter the title or question of the poll in the first input field (with the placeholder text *Ask a question*). Enter the answer options in the next input fields (with the placeholder text *Add answer option*). To create an additional answer option, click the *Add new answer* button. You can select how long you want the poll to remain open in the *Poll duration* field.

Clicking *Show more settings* opens an area with additional settings. This is where you specify whether participants can select more than one answer, see the user names in the result, and add their own answers.

Click *Create* to start the poll.

Information

Once a user has taken a poll, it can no longer be modified.

Subscribe to hashtag

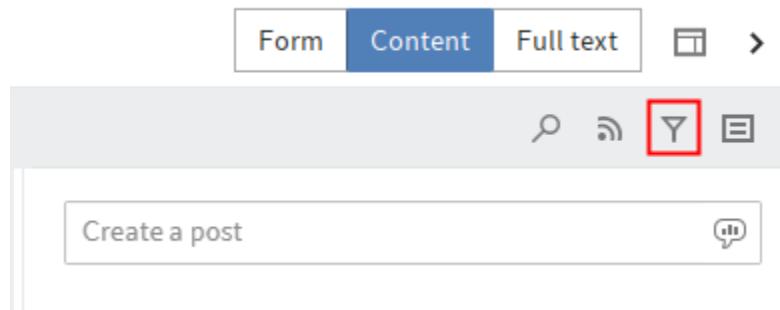
To be notified of new posts related to a specific topic, you can subscribe to hashtags.



Click the hashtag you want to follow. You will see an overview of posts with this hashtag. Click *Subscribe* (antenna icon) in the upper bar.

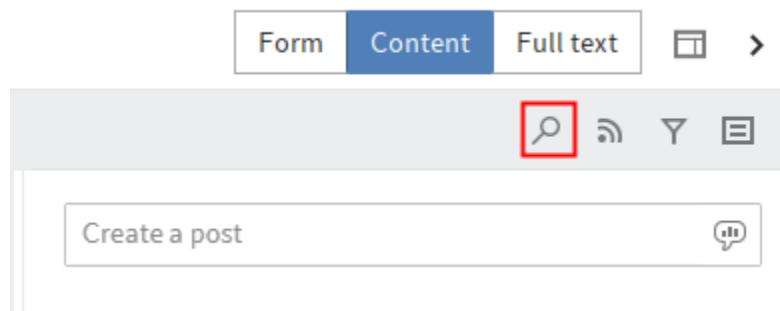
You have subscribed to the hashtag. All posts that are marked with the corresponding hashtag appear in the *My ELO* work area.

Show filter options



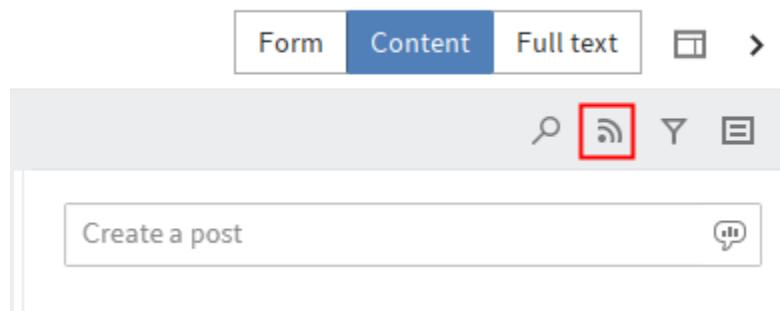
The *Show filter options* button opens a window with filters for the corresponding feed. You can use these filters to restrict the feed to posts that match the respective filter.

Search feed



Use the *Search feed* button (magnifying glass icon) to search within the currently selected feed. When the search term is found, the feed is narrowed down to the corresponding posts. The matches are highlighted. Click the magnifying glass icon to start the search. To reset the search and display the entire feed, click the X icon next to the selected search term.

Subscribe to feed



Use the *Subscribe* button (antenna icon) to subscribe to the feed. All feeds you have subscribed to are listed in the *My ELO* work area. Once a post is added to one of these feeds, you also see the post in the *My ELO* work area.

Automatically subscribe to feed

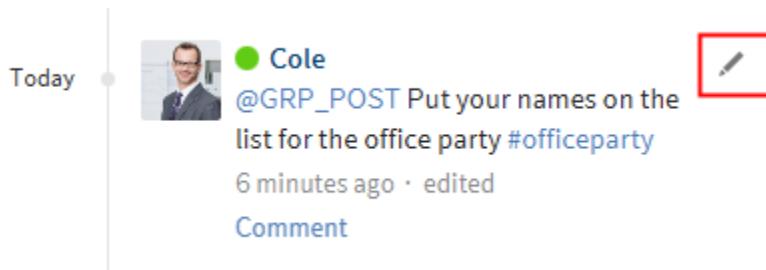
You can automatically subscribe to feeds. This applies to specific events that are triggered by a user:

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

You can enable the automatic feed subscription options in *My ELO > Settings > My ELO settings*.

Alternative: You can also enable the automatic feed subscription option under *Ribbon > User menu [your name] > Configuration > Advanced settings > My ELO*.

Edit post



Click the *Edit* button (pencil icon) to edit your own feed posts and comments.

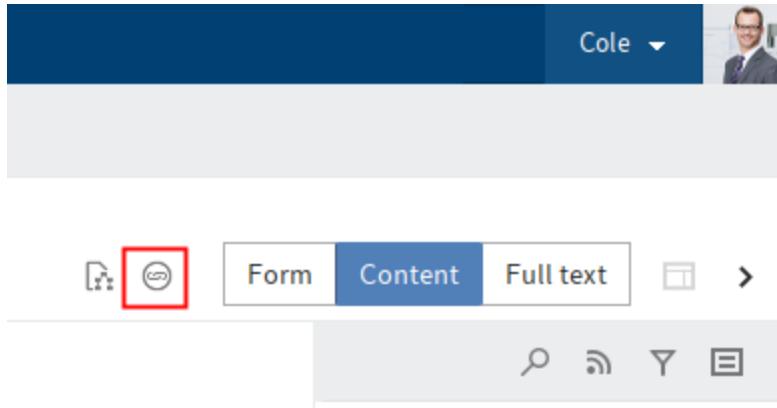
Margin notes, links, attachments

If available for the selected document, you will see the following additional elements:

A screenshot of the ELO Java Client interface. At the top, there is a ribbon with tabs: Favorites, New, View, Output, Organize, Document (selected), and a dropdown arrow. Below the ribbon, there are four buttons: Open in read-only mode, Check out and edit, Edit document, and Check in. On the left, there is a sidebar titled "Repository1" with three items: Customers, Department Management, and Department Marketing. On the right, there is a main area titled "Invoice Version 2 of Invoice 100" with a progress bar at 79% and a small thumbnail image. A red box highlights the "Edit document" button in the ribbon and the thumbnail image in the main area.

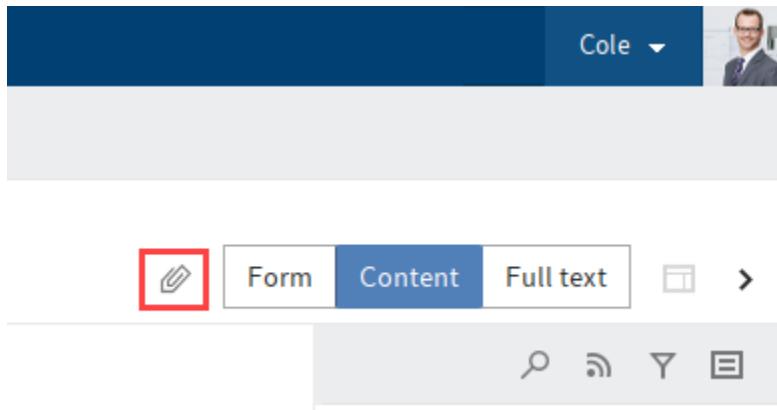
Margin notes: You will see margin notes for an entry on the split bar. Clicking the icon opens the margin note.

You can learn how to create a margin note in the chapters General margin note, Personal margin note, and Permanent margin note.



Links: The chain icon represents a link. Clicking the icon opens an overview of links. You can also create additional entries as links.

To learn how to create a link, refer to the chapter Link.



Attachment: The paper clip icon represents an attachment that was filed along with the selected document. Click the icon to open the attachment.

You can learn how to create an attachment in the chapter Add attachment.

Important actions in detail

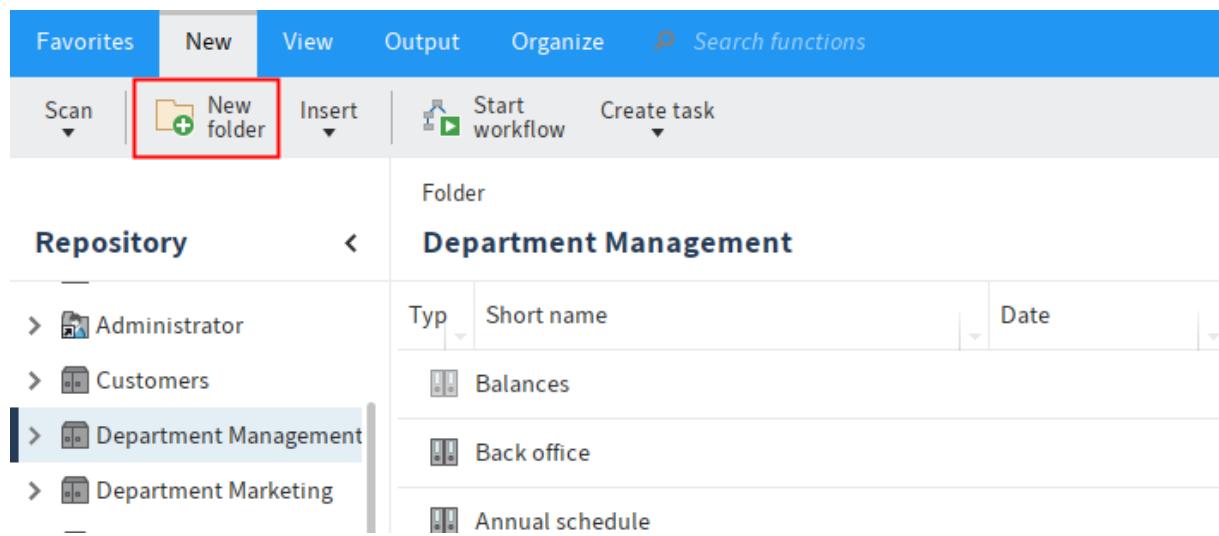
This chapter uses practical examples to introduce you to the different functions in the ELO Java Client.

Create folders

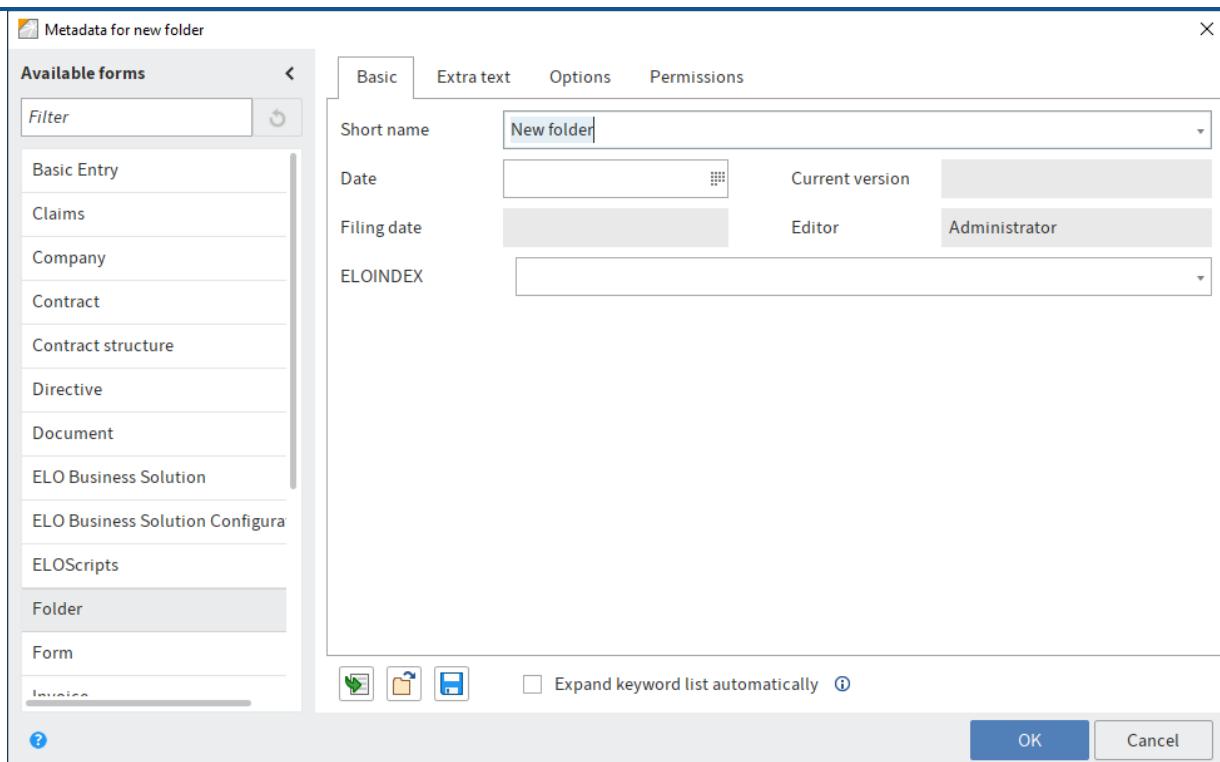
You want to create a new folder in ELO.

Method

1. Open the *Repository* work area.
2. Select the folder in the repository that you want to create the new folder in.



3. On the ribbon, click *New folder* on the *New* tab.



The *Metadata for new folder* dialog box opens. The *Folder* form is selected by default.

Information

In the *Metadata for new folder* dialog box, you only see forms in the *Available forms* column that have been assigned the *Folders* usage option in the metadata form manager of the ELO Administration Console.

4. Enter the name of the new folder in the *Short name* field.

Information

The more detailed your entries are, the easier it will be for you to locate the folder.

5. Once you have entered the required information, click *Next*.

Result

A new folder is created.

Outlook

The folder can be used for filing documents or for creating additional child folders.

You can save an existing folder structure as a default index and insert it into other folders. A default index is used as a template and can be used as often as required. You will find more information here: [Save as default index](#).

Insert document

You have the following options for storing a document in ELO:

- [with drag-and-drop](#)
- [with the 'Insert file' function](#)
- [scan it to the Intray and file it](#)
- [with the 'Document from template' function](#)

File a document with drag-and-drop

You want to drag and drop a document to ELO from Windows Explorer.

Method

1. Open Windows Explorer.
2. Open the ELO Java Client.
3. Minimize both windows and arrange the windows next to each other.
4. Open the *Repository* work area in ELO.
5. Select the target folder in ELO.
6. Click the document in Windows Explorer and drag it to the selected folder.

Alternative: You can file multiple documents to ELO. Select the documents while holding SHIFT or CTRL in Windows Explorer and drag them to the selected folder.

The screenshot shows the ELO Java Client interface. The top navigation bar includes 'Favorites', 'New', 'View', 'Output', 'Organize', and a search function. Below the navigation bar are buttons for 'Navigation' (with arrows and a refresh icon), 'Views', 'Window', 'Display', 'Thumbnails', and 'Arrange'. The left pane, titled 'Repository', contains a tree view of various departments and a folder named 'Dynamic folders'. A file named 'EX10_2020_Invoice_Contelo.pdf' is selected, highlighted with a red border. The right pane, titled 'All orders', lists several order items, each with a small preview icon and a file name. The list includes 'Multipage order 2(TIF, BW, 200 DPI)', 'order', '[Anderson] Order 32476', 'Order Cole', 'Order Doormouse', 'Order template', 'Order template', and 'Orders'.

7. Release the mouse button.

The screenshot shows the 'Metadata for new document' dialog box. On the left is a sidebar titled 'Available forms' with a 'Filter' input field and a list of form types: Barcode recognition, Basic Entry, Claims, Contract, Contract structure, Damage report, Document, Documentation, E-mail, ELO Business Solution Configura, ELOScripts, and Form. The main area has tabs for 'Basic', 'Extra text', 'Options', and 'Permissions'. Under the 'Basic' tab, fields include 'Short name' (set to 'EX10_2020_Invoice_Contelo'), 'Date' (set to 'Apr 29, 2020, 8:56 AM'), 'Filing date' (grayed out), 'Current version' (grayed out), 'Editor' (set to 'Administrator'), and a checkbox for 'Expand keyword list automatically' which is checked. At the bottom are 'OK' and 'Cancel' buttons.

The *Metadata for new document* dialog box opens.

8. Select a metadata form in the *Available forms* column.

9.

Enter a short name.

Optional: Enter additional metadata.

Alternative: For multiple documents, you can enable the *Same metadata for all documents (serial filing)* option below the *Short name* field. Refer to chapter Serial filing for more information.

Information

The more precise the information is that you enter for a document, the easier it is to find the document later on. You will find detailed information on the topic of metadata here: Metadata.

10. Click *OK* once you have entered all metadata.

Result

You have filed the document to ELO.

Outlook

You can modify documents stored in ELO. If the document is version-controlled, a new version of the document is stored after you have made changes. The old version is retained. You have the following options:

- [Check out and edit document](#)
- Load new version

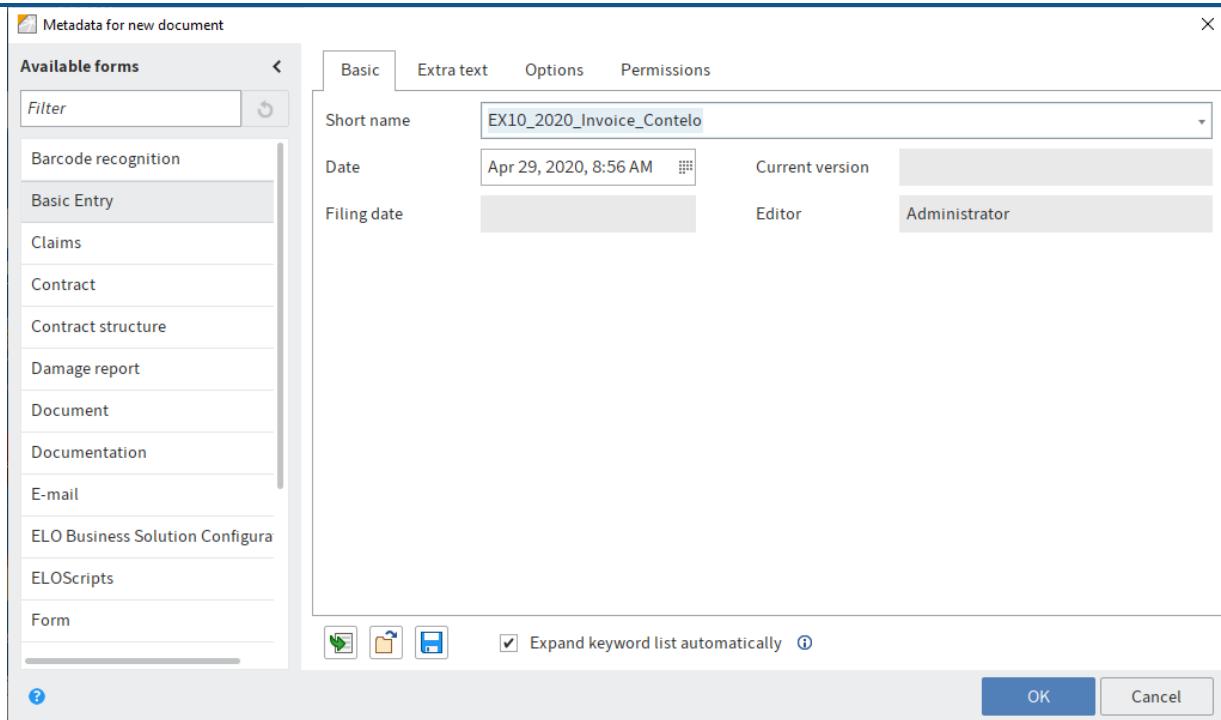
Store document with the 'Insert file' function

You want to transfer a document from your file system to ELO.

Method

1. In the *Repository* work area, click the folder that you want to insert the document into.
2. On the ribbon, click *New > Insert > Insert file*.
3. In the *Insert file* dialog box, select the desired file.

Alternative: You can file multiple files to ELO. Select the desired files while holding the SHIFT or CTRL key.



The *Metadata for new document* dialog box opens.

4. Select a metadata form in the *Available forms* column.
5. Enter a short name.

Optional: Enter additional metadata.

Alternative: For multiple files, you can enable the *Same metadata for all documents (serial filing)* option below the *Short name* field. Refer to chapter Serial filing for more information.

Information

The more precise the information is that you enter for a document, the easier it is to find the document later on. You will find detailed information on the topic of metadata here: Metadata.

6. Click *OK* once you have entered all metadata.

Result

You have filed the document to ELO.

Outlook

You can modify documents stored in ELO. If the document is version-controlled, a new version of the document is stored after you have made changes. The old version is retained. You have the following options:

-

[Check out and edit document](#)

- Load new version

Scan a document to the Intray and file it

You want to scan a document and file it to ELO.

Requirements

- A scanner needs to be connected to the computer.
- You will need a document, such as a letter or invoice, that you want to scan and file to ELO.
- You must know where you want to store the document in ELO.

Please note

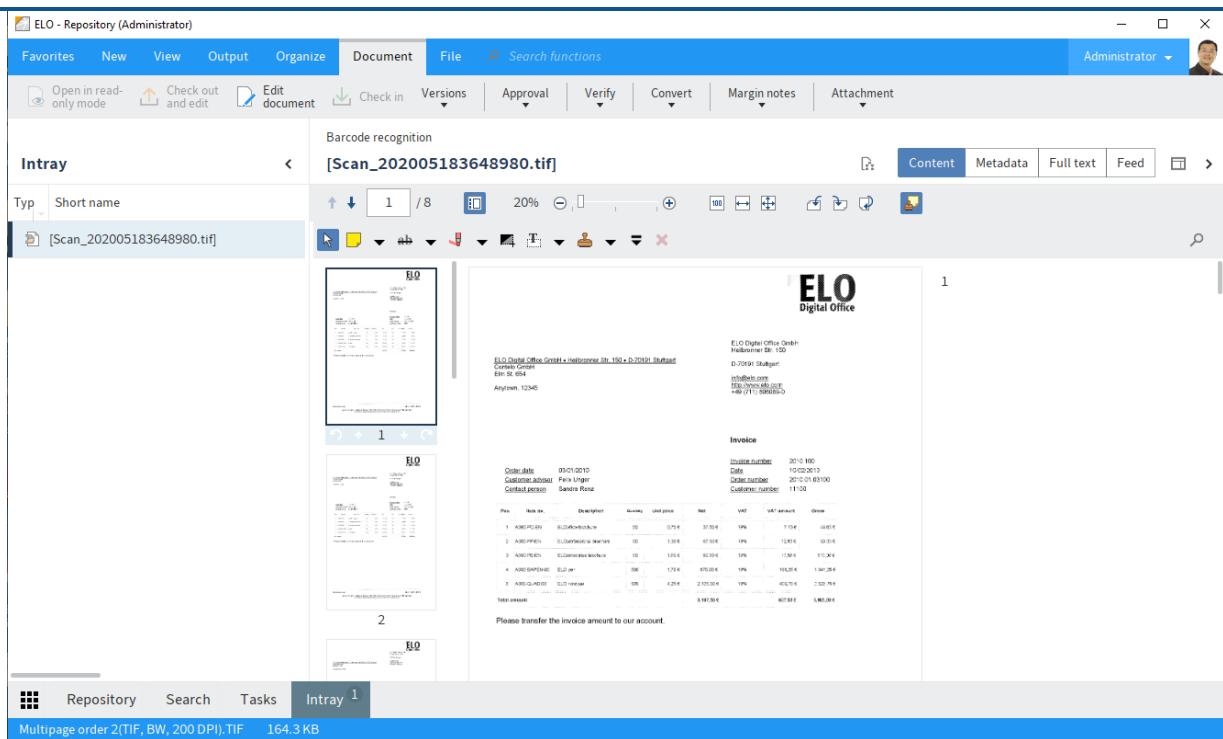
If you are using the 64-bit version of ELO, you will need to use the ELOscanTool for scanning. You will find this setting under *Ribbon > User menu {your name} > Configuration > Technical presets > General > Use as scan method > ELOscanTool TWAIN (Windows)*.

Method

1. Open the *Intray* work area.
2. Place the document in the scanner.
3. Click the *Scan document* button on the *File* tab to start the scan process.

Optional: A dialog box may appear. Make the desired settings and click *Scan*.

The scan is performed.

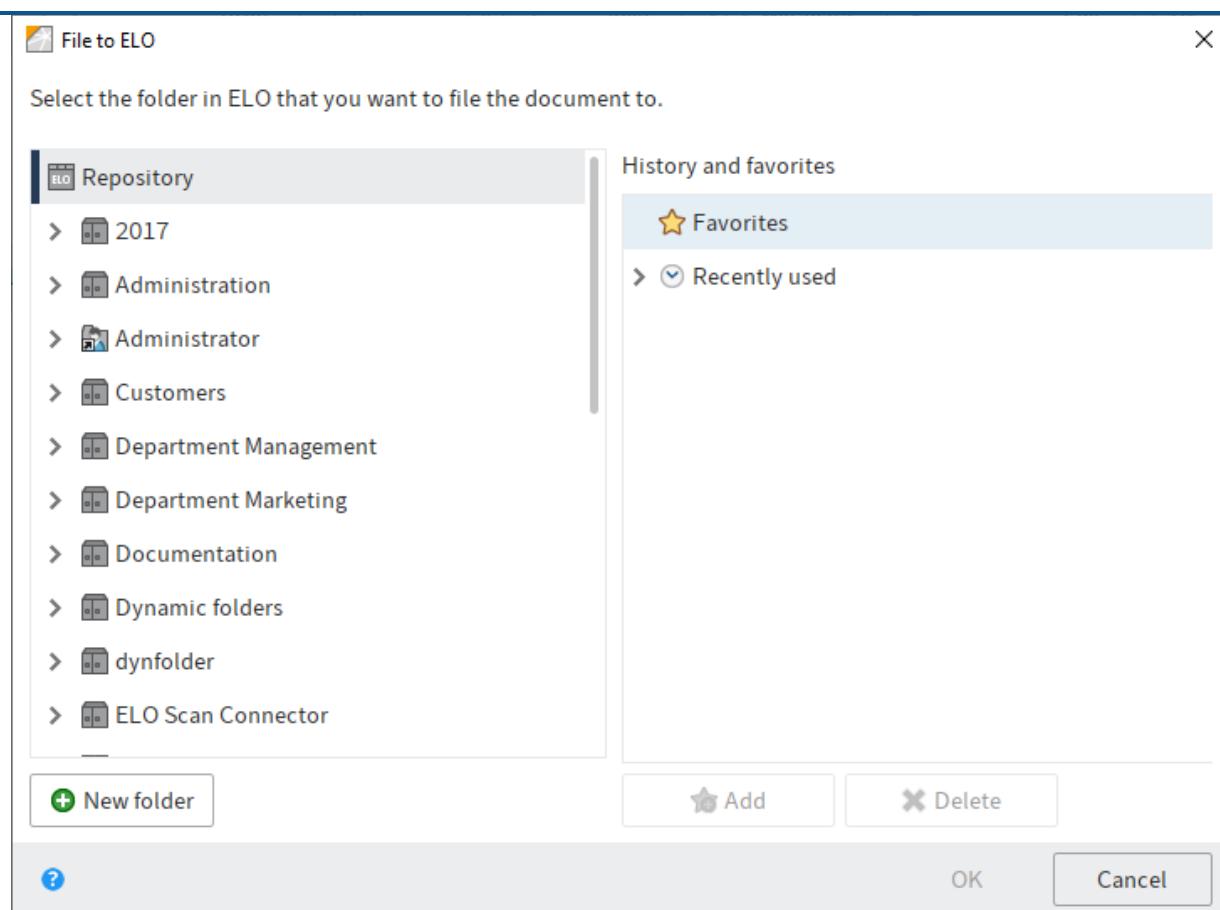


The scanned document appears in the viewer pane.

File document

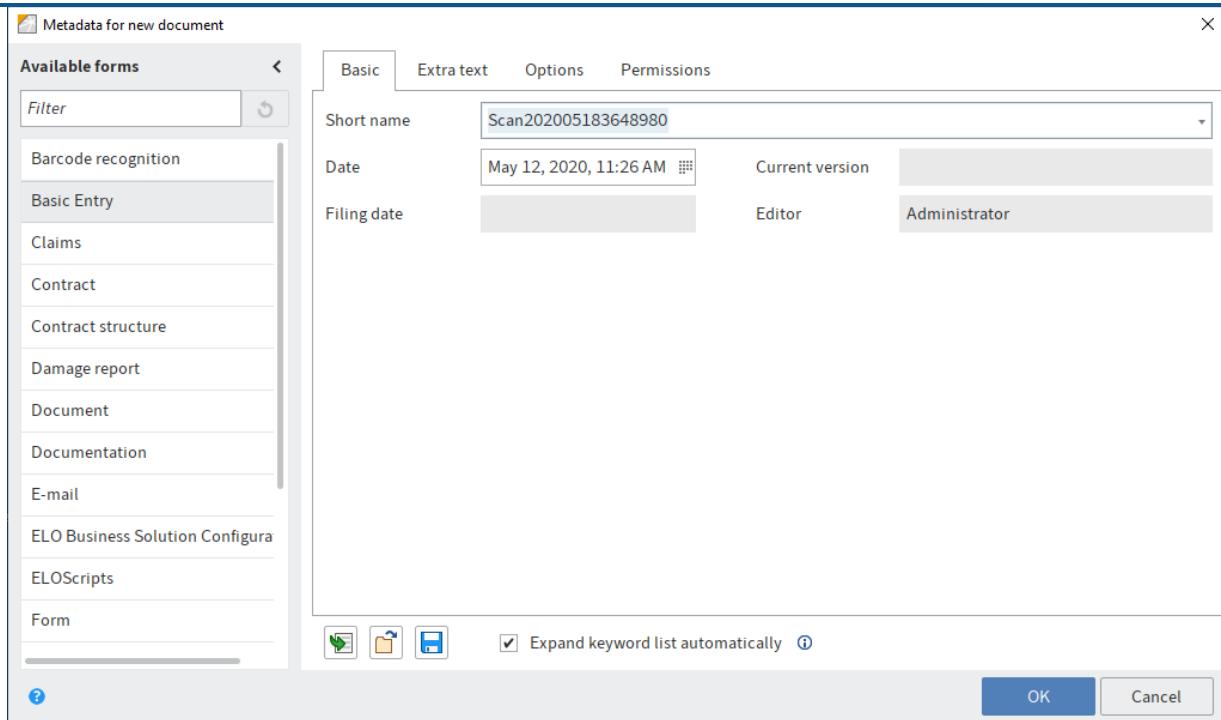
Follow these steps to file the scanned document to ELO.

1. Select the scanned document in the *Intrag* work area.
2. On the *File* tab, click *File to ELO*.



The *File to ELO* dialog box opens.

3. Select the folder where the scanned document should be filed.
4. Click *OK*.



The *Metadata for new document* dialog box opens.

5. Select a metadata form in the *Available forms* column.
6. Enter a short name.

Optional: Enter additional metadata.

Information

The more precise the information is that you enter for a document, the easier it is to find the document later on. You will find detailed information on the topic of metadata here: [Metadata](#).

7. Click *OK* once you have entered all metadata.

Result

You have filed the document to ELO.

Outlook

You will find more information about the functions on the *File* tab here: 'File' tab.

You can modify documents stored in ELO. If the document is version-controlled, a new version of the document is stored after you have made changes. The old version is retained. You have the following options:

- [Check out and edit document](#)
-

Load new version

Store document with the 'Document from template' function

You want to create a new document with the help of a document template.

Requirements

- Templates must be created in an application such as Microsoft Word.
- There must be a document template in ELO, e. g. for Microsoft Word documents.
- You must know the name of the folder in ELO containing the document templates.
- You must know where you want to store the document in ELO.

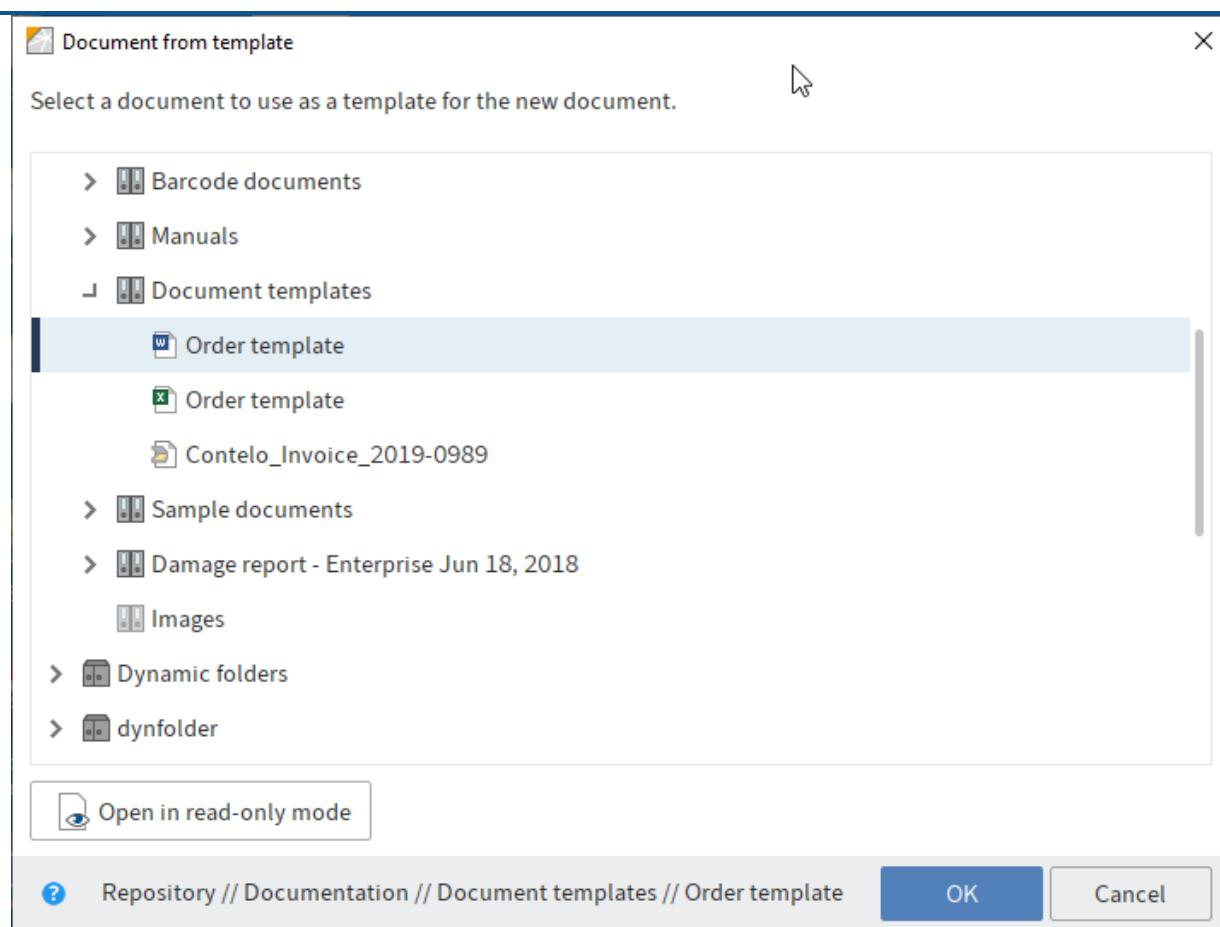
Information

Assuming you have the corresponding permissions, you can define a central folder for templates in ELO. You will find this setting under *Ribbon > User menu {your name} > Configuration > Technical presets > Folder for document templates*.

Method

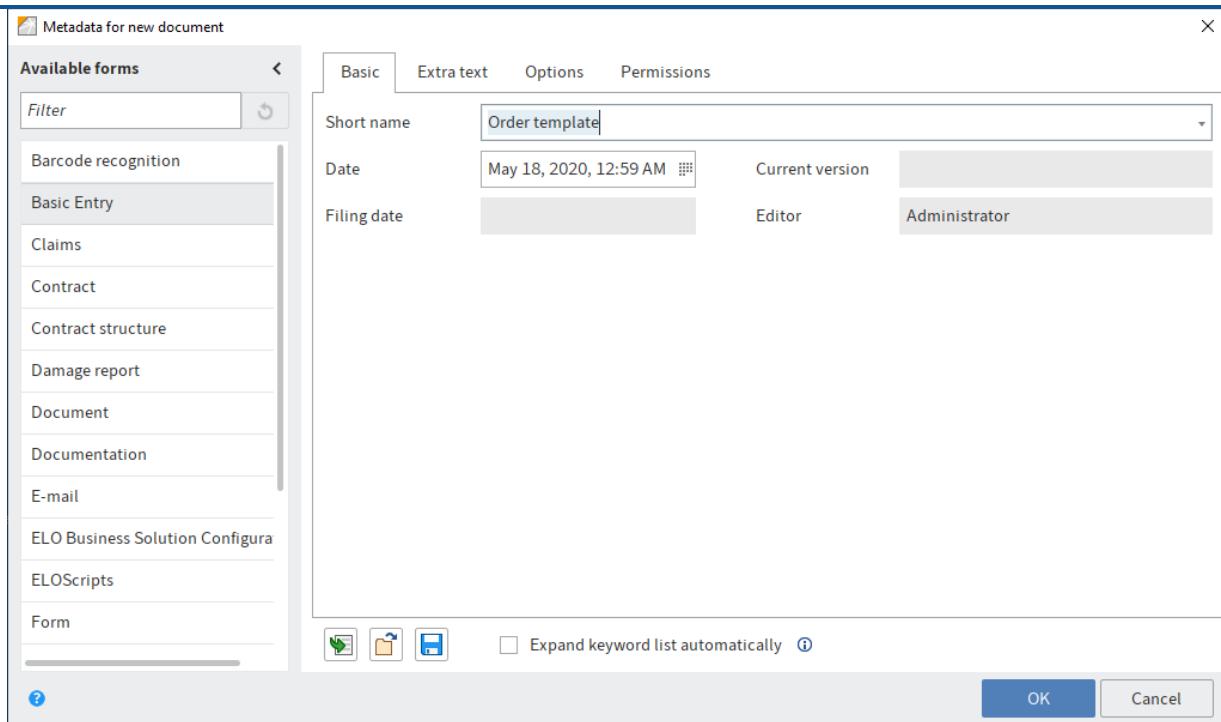
1. Open the *Repository* work area.
2. Select the folder in the tree structure that you want to file the document to.
3. On the ribbon, click *New > Insert > Document from template*.

Keyboard shortcut: CTRL + N



The *Document from template* dialog box opens.

4. Open the folder with the document templates and select the appropriate template.
5. Click *OK*.



The *Metadata for new document* dialog box opens.

6. Select a metadata form in the *Available forms* column.
7. Enter a short name.

Optional: Enter additional metadata.

Information

The more precise the information is that you enter for a document, the easier it is to find the document later on. You will find detailed information on the topic of metadata here: [Metadata](#).

8. Click *OK* once you have entered all metadata.

The dialog box closes. The corresponding external application will start and the document template will be displayed.

9. Make the desired changes.
10. Save the document and close the external application.

The document is now located in the designated folder in ELO.

11. Click the document.
12. On the ribbon, click *Document > Check in*.

Keyboard shortcut: ALT + I

The *Version information* dialog may appear. If so, enter a version number and a version comment.

Result

You have filed the new document to ELO.

Outlook

You can modify documents stored in ELO. If the document is version-controlled, a new version of the document is stored after you have made changes. The old version is retained. You have the following options:

- [Check out and edit document](#)
- Load new version

Edit entry

You can edit the content of documents in ELO. To do so, you must check out the document, and check it back into ELO when you have finished working on it. You can [Check out and edit](#) a single document or an entire [folder](#). When an entry is checked out (folder or document), it is locked and cannot be edited by other users.

Check out and edit document

You want to edit a document and file the new version to ELO.

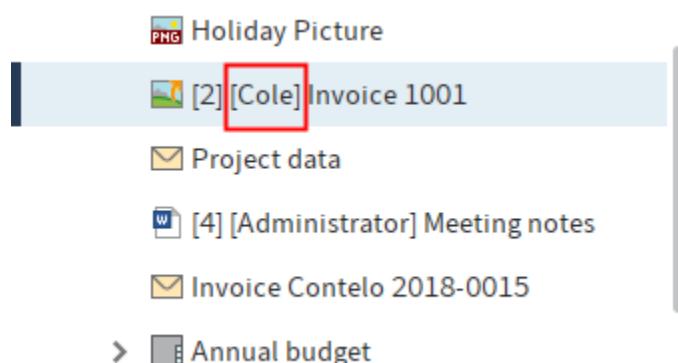
Method

1. Open the *Repository* work area.
2. Click the document you want to edit.

The preview of the document is displayed in the viewer pane.

3. On the ribbon, click *Document > Check out and edit*.

Keyboard shortcut: ALT + O



The document is opened in the corresponding application and can be edited.

In ELO, the name of the editor is shown in square brackets before the document name. The document cannot be edited by other users as long as it is checked out.

4. Edit the document in the external application.
5. Save the document in the external application.
6. Close the external application.

Information

You can file the edited document to ELO via the *Repository* work area or the *In use* work area. Select the *Check in* function on the *Document* tab.

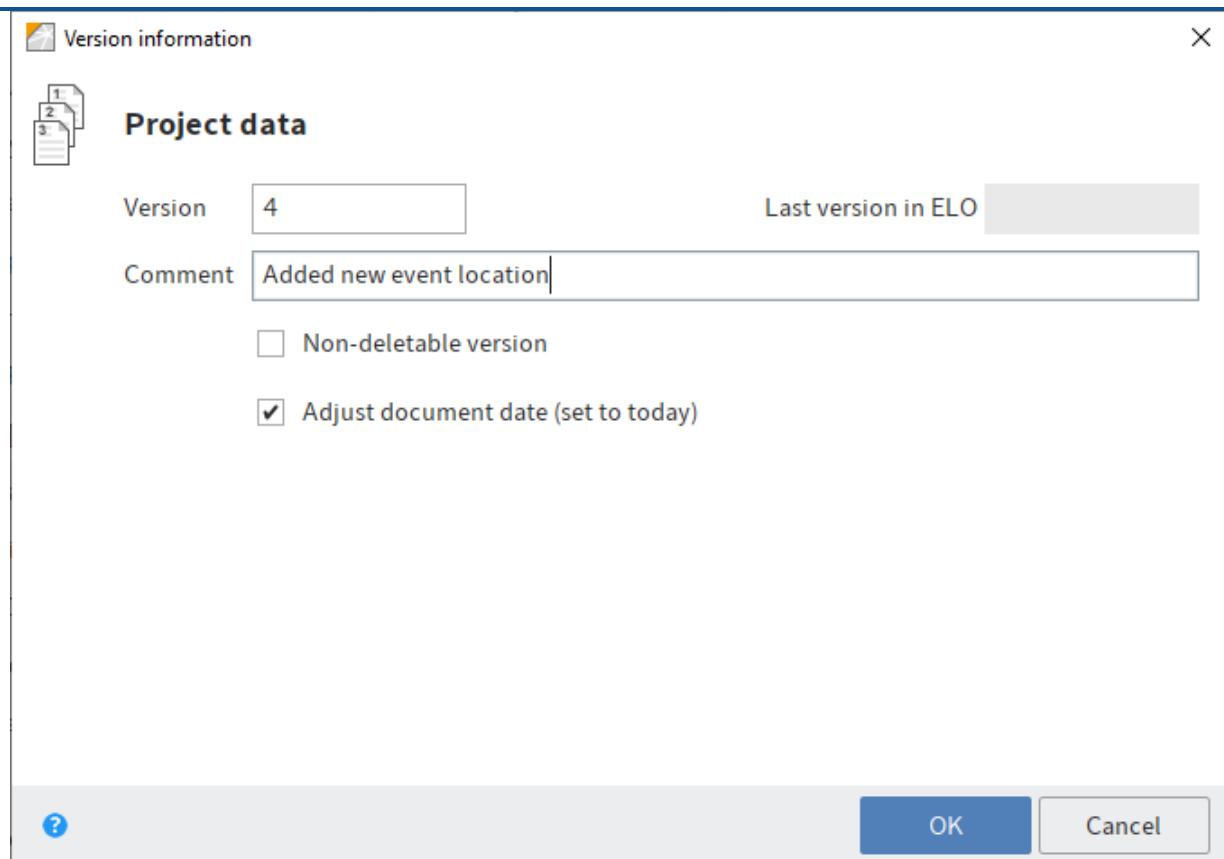
7. Select the document in ELO.
8. Click *Check in* on the *Document* tab to transfer the document back to ELO.

Keyboard shortcut: ALT + I

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

Information

If you do not change a document and select the *Check in* function, the *Check in document* dialog opens. In this dialog box, you can cancel editing or file the document as a new version anyway.



The *Version information* dialog box appears.

Optional: Enter a version number and version comment.

If you want to update the document date in ELO to the current date, select the *Adjust document date (set to today)* option. The document date is the date that is saved along with the document version. In contrast, the filing date is the date on which a document was filed to ELO.

Users with the appropriate permissions can delete versions of a version-controlled document. If you do not want your version to be deleted, select the *Non-deletable version* option.

9. Click *OK*.

Result

The document is checked back into the *Repository* work area with a new version number.

Alternative

- Load new version: With this function, you can also load a new version without checking out and editing the current version of a document filed to ELO.
- Check out to OneDrive: Use this function to check out a Microsoft Office document in ELO to Microsoft OneDrive for editing. The document is stored in your OneDrive folder until you check it back into ELO.

Check out and edit folder

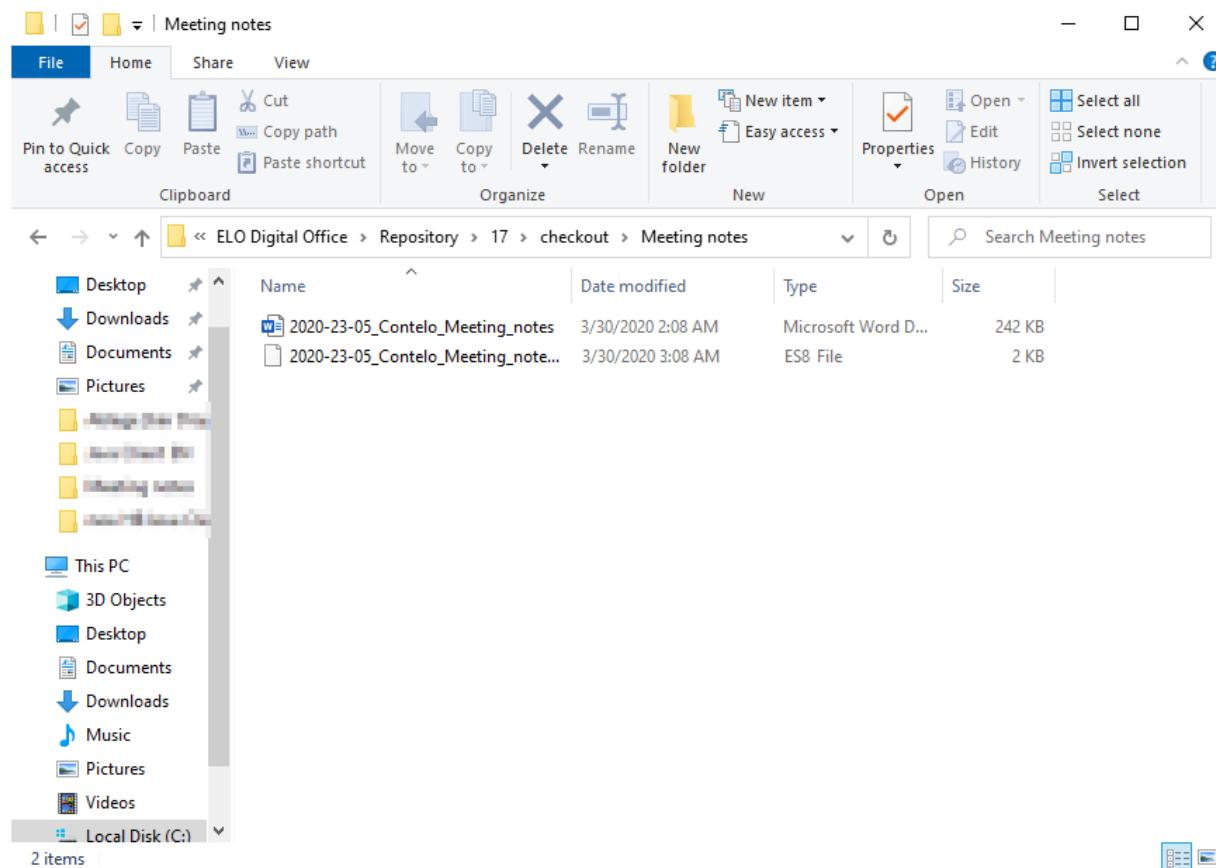
ELO also lets you check out entire folders and edit their contents. This allows you to lock multiple documents at once.

Please note

If you check out a folder with all the references, you cannot check in the references separately. Instead, you need to check in the entire folder. In addition, you cannot check in the original documents that are linked to the references until you have checked in the entire folder.

Method

1. Open the *Repository* work area.
2. Select the folder you want to check out.
3. Right-click the folder to open the context menu.
4. In the context menu, click *Check out and edit*.



The folder is temporarily stored in a checkout directory on your file system. You can open and edit the individual documents from here.

Information

Child folders are not checked out. A file in ES8 format is created for each document. Files in ES8 format are used for saving metadata. The Windows Explorer default settings hide ES8 files.

The entire folder appears as checked out in the *In use* work area.

Check in

When you have finished editing the documents, you can check the folder back into ELO.

5. Select the checked out folder in ELO.
6. Right-click the folder to open the context menu.
7. In the context menu, click *Check in*.

During check-in, ELO recognizes which documents have been changed. With the default settings, the *Version information* dialog box appears for every changed document.

Result

The folder was checked in. The changed documents were filed as new versions.

Start workflow

Using workflows, you can assign other users or user groups tasks.

An integrated escalation management function allows you to track whether the set deadlines are met once a workflow is started.

The following options are available for starting workflows:

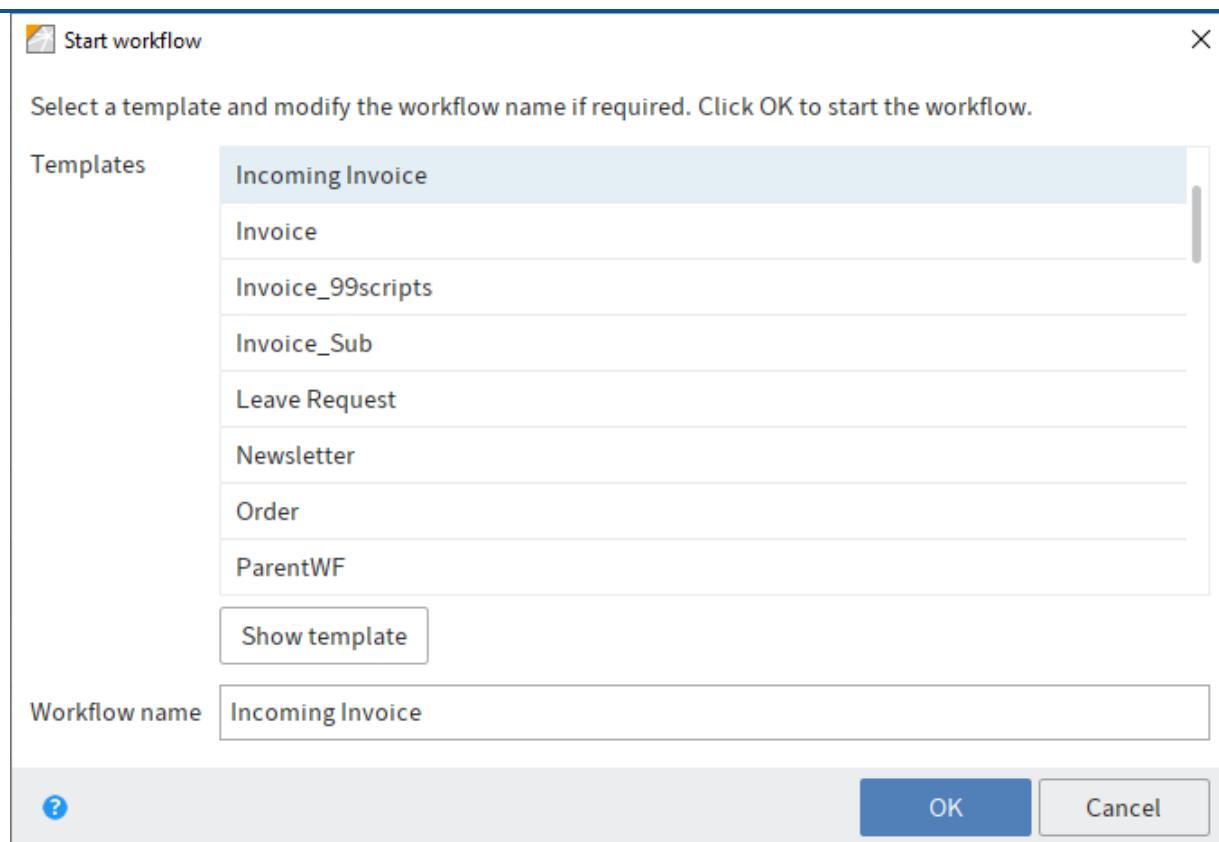
- *Start ad hoc workflow* function
- *Start workflow* function

Ad hoc workflows are simple, predefined workflows available in ELO. The workflows available to you when you run the *Start workflow* function were defined by your company.

You can learn how to start an ad hoc workflow in the chapter Ad hoc workflow.

Method

1. Select the entry (folder or document) you want to start a workflow for.
2. Click *Start workflow* on the *New* tab of the ribbon.



3. Click a workflow template to select it.

Show template: Click here to see the individual steps of the workflow. As the workflow is already configured, you do not have to configure any additional settings.

Information

To allow changes to the template when starting the workflow, enable the option *Start workflow in edit mode* (Ribbon > User menu [your name] > Configuration > Advanced settings > Workflow).

In addition to the workflow steps, you will see the respective editor and the escalation time for the workflow step (days:minutes:seconds), if set.

Outlook

Once you have started a workflow, it will appear in your *My ELO* work area under *My recently started workflows*.

You can view workflows for an entry using the function *Workflows for this entry* (available in: Ribbon > Organize).

You can find information about creating a workflow template in the [ELO workflow](#) documentation.

Forward workflow

When you receive a workflow task, it will appear in your *Tasks* work area. You can see what task you are being requested to perform in the workflow step field.

To complete your task, forward the workflow.

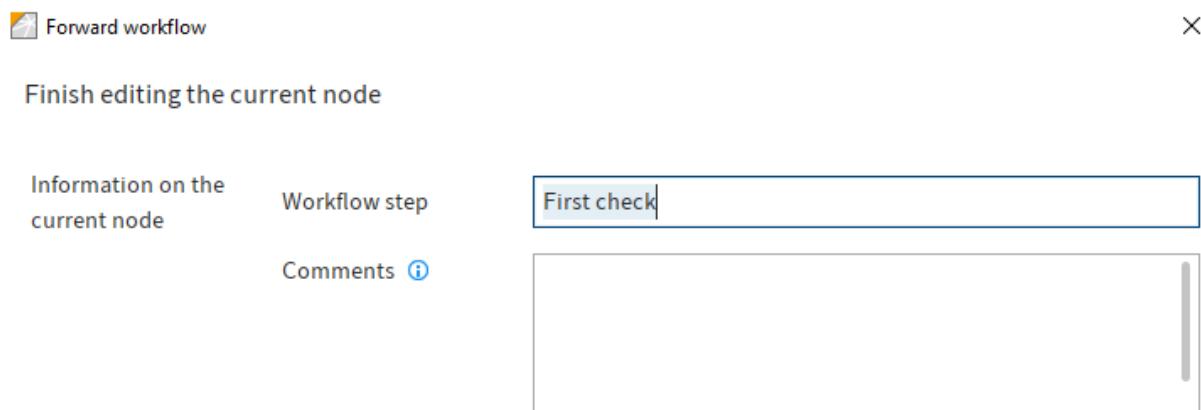
If you have received a workflow and the *Forward workflow* button on the *Task* tab is inactive, this is for one of the following reasons:

- You received the workflow as a member of a group. In this case, you have to accept it first by clicking the *Accept workflow* button on the *Task* tab. This prevents the workflow from being processed by multiple users at once. Once you have accepted a workflow, it will disappear from the task list of the other group members.
- The workflow contains a form. You will see the form in the viewer pane on the *Form* tab. In this case, forward the workflow as described further below by clicking the button on the form.

The way you forward a workflow differs depending on whether the workflow contains a form or not.

Method without a form

1. Select the workflow that you want to forward.
2. Click *Forward workflow* on the *Task* tab of the ribbon.



Forward

Select the next workflow step:

→ End node



Cancel

You can make the following settings:

Workflow step: Enter the name of the workflow node here.

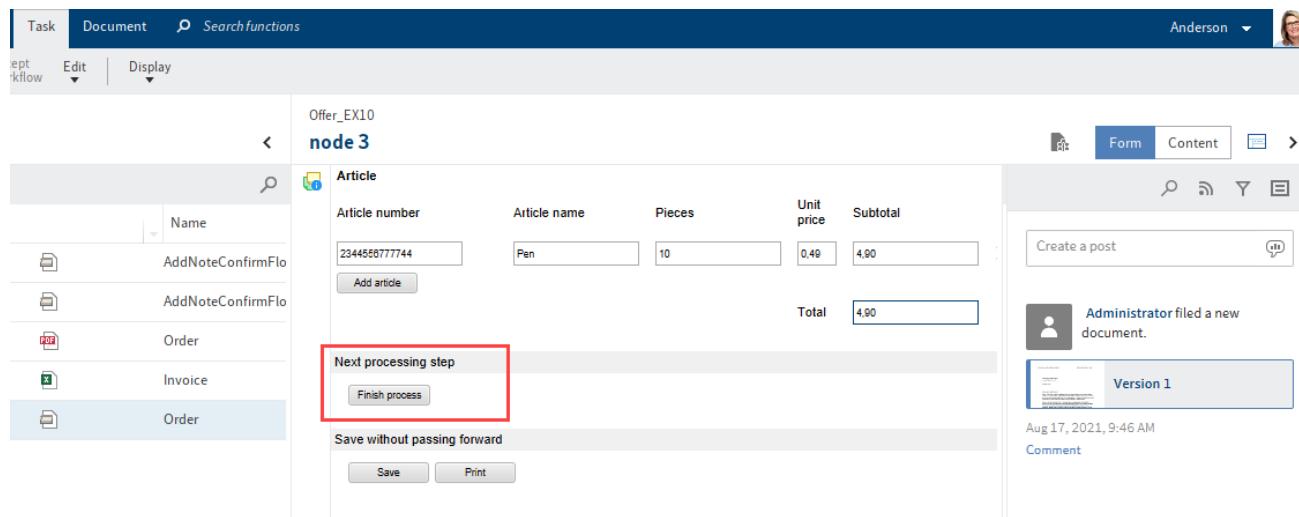
Comments: Enter a message or instructions for the next user here. Be advised that you can only view the comment if you navigate to *Organize > Overviews > Workflow overview* and enable the *List view*.

3. As soon as you click the name of the successor node, the node is forwarded and the dialog box closes.

Select the next workflow step: Depending on which settings apply for the current node, you can select one or more successor nodes in the *Forward* area.

Method with a form

If you receive a workflow you have to forward via a form, the *Forward workflow* button is not active. You will see the form in the viewer pane on the *Form* tab.



1. Edit the fields of the form as indicated in the task.
2. To forward the workflow, click the corresponding button within the form.

Create tile

You can create tiles that provide you with quick access to a specific area of the repository. These types of tiles are called views.

A new view is displayed as a tile in the tile navigation on your *My ELO* home screen.

You can create two types of views:

- Folder view: A folder view takes you straight to a frequently used folder.
- Task view: A task view shows you tasks with criteria you selected (e. g. tasks with expired deadlines).

Information

Like views, search favorites are displayed as tiles on your *My ELO* home screen. You can learn more about search favorites in the chapter Save search.

Create folder view

You can create views for folders in the *Repository* work area that you use frequently.

Method

1. In the *Repository* work area, select the folder you want to create a view for.
2. Click *New view* on the *View* tab of the ribbon.

Keyboard shortcut: ALT + N

In the *New view* dialog box, the name of the folder is automatically displayed in the *Name* field. You can change this name if you want to use a different one.

In the *Folder* area, the folder that you just selected in the *Repository* work area is already selected. You can select a different folder if you want to.

3. Click *OK*.

Result

A tile is created for the new view under the *Repository* group in the tile navigation.

Outlook

You can drag and drop a tile to another position.

You can also pin a tile to the navigation bar using the context menu (right-click).

You will find more information here: Tile navigation.

If you have created multiple views, you have the option to group them. To learn how to create a group in the tile navigation, refer to the chapter Create group.

You can rename or delete a folder view. To do so, click *View > Views > Manage views* on the ribbon and select the corresponding view in the dialog box.

Create task view

You can create task views with your own custom criteria, for example with a high priority.

A task view creates a tile that gives you direct access to the tasks meeting the selected criteria.

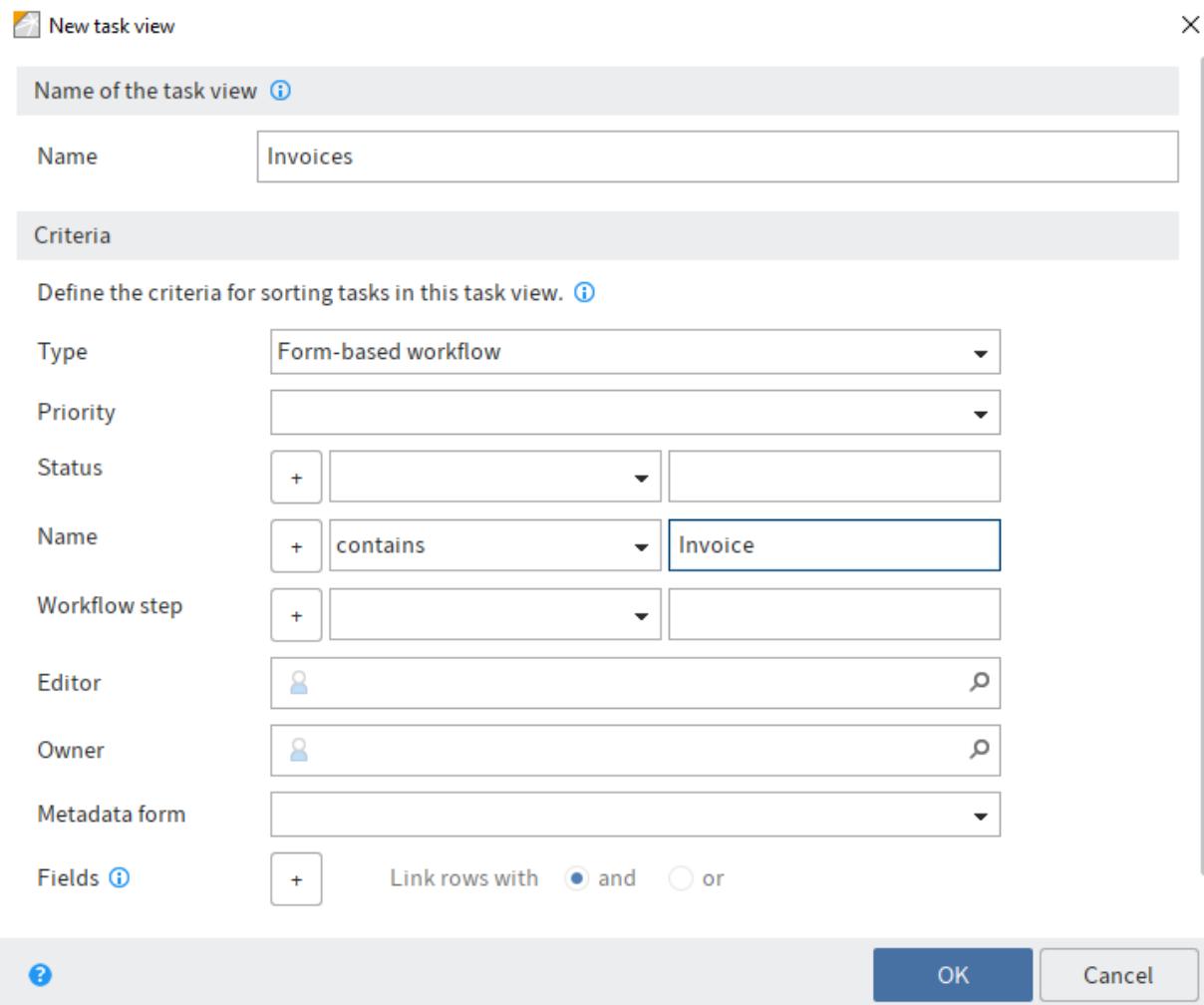
Please note

Tasks displayed in a task view based on the criteria you set are no longer visible in the *Tasks* work area. You can access these tasks from the corresponding task view tile in the tile navigation of the *My ELO* work area.

Method

1. Navigate to the *Tasks* work area.
2. Click *New view* on the *View* tab of the ribbon.

Keyboard shortcut: ALT + N



3. In the *New task view* dialog box, define the criteria for showing tasks in the task view.

Some fields are only enabled based on other fields. For example, *Fields* is enabled once you have made a selection under *Forms*.

You can set the following criteria:

- Type: Use the *Type* drop-down menu to select the type of tasks you want to filter by. If no task type is selected, all tasks are displayed.
-

Priority: Use the *Priority* drop-down menu to specify the priority according to which you want to filter the tasks. Only tasks with the selected priority are displayed. If no priority is selected, all tasks are displayed.

- Status/Name/Workflow step: Use the drop-down menu and the input field to define which criteria the status, name, or workflow step of the tasks must meet for the corresponding tasks to be displayed.

Use the drop-down menu to select which condition applies.

In the input field, enter the character string that the selected condition should be applied to. To enter multiple strings, separate the entries with the pilcrow character ¶.

- Editor: Select an editor of the tasks. Suggestions will appear as soon as you start to type. The task view only contains tasks assigned to the selected editor.
- Owner: Select an owner of the tasks. Suggestions will appear as soon as you start to type. The task view only contains tasks assigned to the selected owner. The owner is the user who started the workflow.
- Metadata form: Use the *Metadata form* drop-down menu to select a metadata form if you only want tasks with the corresponding metadata form to be displayed in the task view.
- Fields: If you have selected a metadata form, you can use the plus sign to add fields so that you can filter by their contents.

Select the field from the first drop-down menu. In the second drop-down menu, select which condition applies.

In the input field, enter the character string that the selected condition should be applied to.

If you add multiple fields, you can connect the lines with *and* or *or*.

- Show postponed workflows: If the option *Show postponed workflows* option is enabled, postponed workflows will also be displayed within the new task view.

4. Click *OK*.

Result

A tile is created for the new view under the *Tasks* group in the tile navigation.

Outlook

You can drag and drop a tile to another position.

You can also pin a tile to the navigation bar using the context menu (right-click).

You will find more information here: Tile navigation.

If you have created multiple views, you have the option to group them. To learn how to create a group in the tile navigation, refer to the chapter *Create group*.

You can rename or delete a task view. To do so, click *View > Views > Manage views* on the ribbon and select the corresponding view in the dialog box.

You will find more information on the *Tasks* work area here: '*Tasks*' work area.

Search entries

You can search for entries (folders or documents) in ELO.

There are different ways to find documents in ELO. You can either use ELO iSearch or the metadata search.

Input

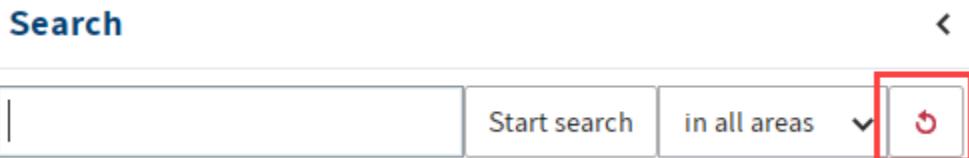
Enter one or more search terms into the input field.

Matching search terms are suggested as you type. To accept a suggestion, double-click on the term.

Information

You will find tips for entering search terms by clicking the *more* button under the input field.

Click *Start search* to search for the term.



Reset search: Clicking this button restores the search default.

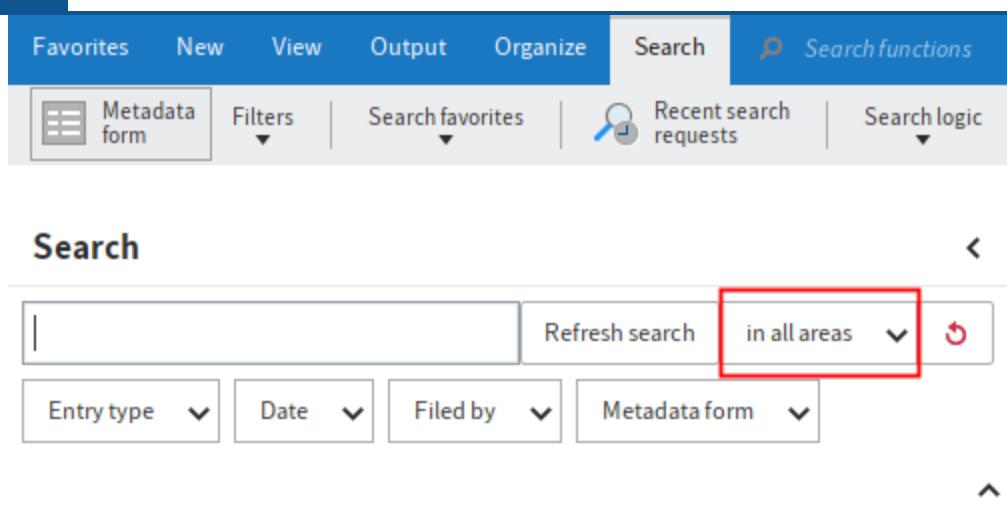
Narrow down search

The following options are available for narrowing down your search:

- [Areas](#)
- [Folders](#)
- [Filters](#)

Narrow down areas

You can limit your search to specific areas.



Click the button *in all areas* and select the areas.

If you have selected multiple areas, the search behaves as follows:

One search term:

- If you enter one search term, entries containing the search term in one of the areas are shown.

Multiple search terms:

- AND search: With an AND search (entering terms without a connecting element, e. g. dog cat), all entries that contain all search terms in one of the searched areas are shown.
- OR search: With an OR search (entering terms with a comma, e. g. dog, cat), all entries that contain at least one search term in one of the searched areas are shown.

Information

For technical reasons and to improve ELO iSearch performance, these areas cannot be searched in combination in the AND search.

Example

You search for two terms in different areas: One of the terms is in the full text of a document, and the other is in the short name. ELO iSearch does not return any matches. In this case, it only lists results that include all search terms in the same area.

If you search for just one of the terms and restrict the search using filters, you will get better results.

Narrow down folders

You can narrow down the search to a single folder.

Information

For technical reasons, this option may cause the search results to take a long time to load.

1. In the *Repository* work area, select the folder you want to search.
2. Switch to the *Search* work area.
3. On the ribbon, click *Search > Search logic > Current folder only*.
4. Make additional settings as required.

You need to click *Start search* again for the restrictions for a previously performed search to take effect. If you select the *Current folder only* option, the searched folder is displayed in a tooltip.

Filters

You can narrow down the search using filters: *Ribbon > Search > Filters*. After you have selected the filter, specify the filter via the drop-down menu.

For detailed information on using filters, refer to the chapter **Filters**.

Display search results

In the *Search* work area, you can use the same functions on entries as in the *Repository* work area, for example edit documents, create tasks, or send entries.

To go to the filing location of the selected entry, click *View > Go to* on the ribbon.

The search results are shown in multiple columns when the default settings are used. The table columns correspond to the fields of the metadata forms. The results can be filtered within the columns. By clicking the column headers, the results can be sorted in ascending or descending order.

Context menu

The screenshot shows the ELO Java Client search interface. At the top, there is a navigation bar with tabs: Favorites, New, View, Output, Organize, Search, and a search functions icon. Below the navigation bar, there are several search-related buttons: Metadata form, Filters, Search favorites, Recent search requests, and Search logic.

The main search area has a search bar containing "contelo", a refresh button, and a dropdown for "in all areas". Below the search bar are four filter dropdowns: Entry type, Date, Filed by, and Metadata form.

A tooltip "Did you mean... content" is displayed above the search results. The results table has columns: Type, Short name, Date (sorted ascending), and Releva. The results list includes items like Contelo GmbH, Contelo, and various invoices from Contelo.

A context menu is open over the "Date" column header. This menu lists various search criteria with checkboxes. Most checkboxes are checked, except for "Link". The menu also includes a "Relevance" checkbox, which is checked. The context menu is highlighted with a red border.

At the bottom of the search results, there are navigation arrows and a message "Results 1 to 8 of 8".

Right-click a column header to open a context menu. Select the columns that you want to display.

Numeric values

The screenshot shows a table with several columns: Filing date, Invoice number, Link, Results to, Invoice am, Customer, Invoice da, Con. A context menu is open over the 'Invoice am' column, which contains numeric values. The menu is titled 'Column Invoice amount' and includes the following items:

- Sum: 19,211.53
- Minimum: 50
- Maximum: 6,098

The menu also contains standard actions like Open in read-only mode (Ctrl-O), Go to, Metadata (F4), Check out and edit (Alt-O), Delete (Ctrl-Delete), and Additional references.

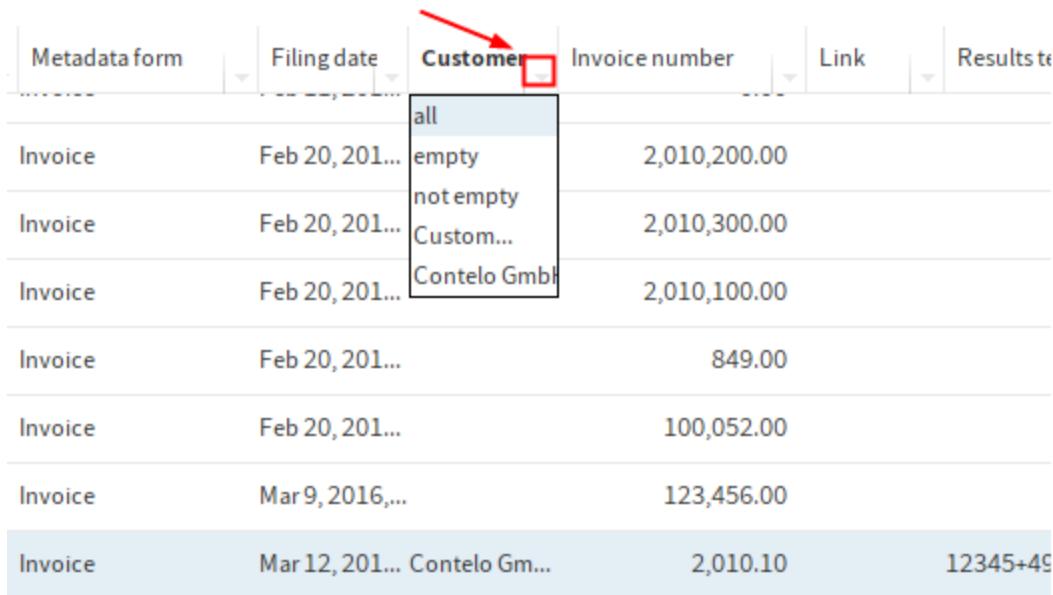
Filing date	Invoice number	Link	Results to	Invoice am	Customer	Invoice da	Con
Mar 12, 201...	2,010.10	12345+49 (71)					
Feb 20, 201...	2,010,200.00						
Feb 20, 201...	2,010,300.00						
Feb 20, 201...	2,010,100.00						
Feb 20, 201...	849.00						
Feb 20, 201...	100,052.00						
Mar 9, 2016,...	221,212,121,200.00	(S)	0Anytown, 12:				

ELO provides the following additional information in the context menu for columns that only contain numeric values.

- Sum: Calculates the column sum.
- Minimum: Returns the lowest value in a column.
- Maximum: Returns the highest value in a column.

Filters

You can apply filters to the columns of the search results.



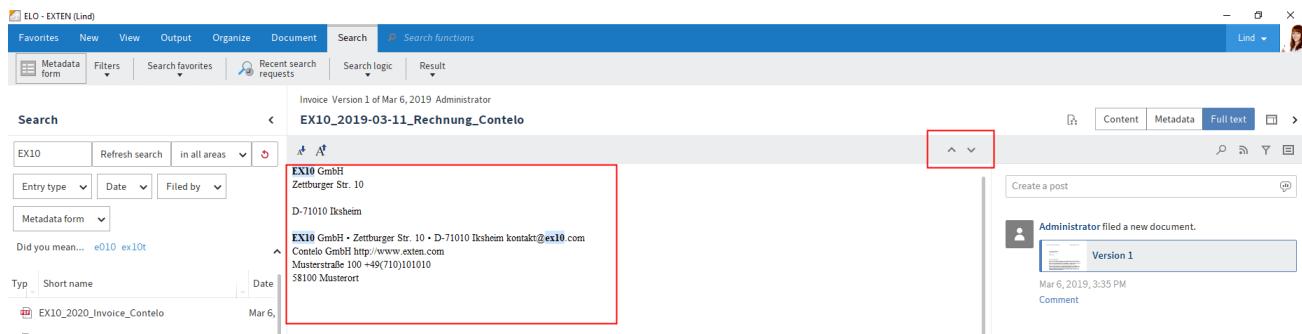
A screenshot of a search results table in the ELO Java Client. The table has columns: Metadata form, Filing date, Customer, Invoice number, Link, and Results text. A red arrow points to the 'Customer' column header, which is highlighted with a red border. A context menu is open over this header, listing options: all, empty, not empty, Custom..., and Contelo Gmb...

Metadata form	Filing date	Customer	Invoice number	Link	Results text
Invoice	Feb 20, 201...	all			
Invoice	Feb 20, 201...	empty	2,010,200.00		
Invoice	Feb 20, 201...	not empty	2,010,300.00		
Invoice	Feb 20, 201...	Custom...	2,010,100.00		
Invoice	Feb 20, 201...	Contelo Gmb...	849.00		
Invoice	Feb 20, 201...		100,052.00		
Invoice	Mar 9, 2016,...		123,456.00		
Invoice	Mar 12, 201...	Contelo Gm...	2,010.10	12345+49	

You can access the filters via the arrow icon next to the column label.

Highlighted full text matches

Matches are highlighted in the full text preview. Switch to the *Full text* option in the viewer pane.



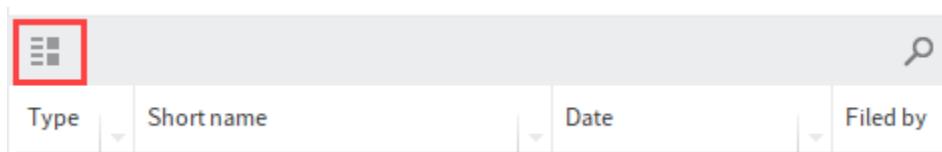
A screenshot of the ELO Java Client search results viewer pane. The pane shows a document titled "EX10_2019-03-11_Rechnung_Contelo". The full text preview area contains several matches for the term "EX10", which are highlighted with red boxes. The viewer pane includes tabs for Content, Metadata, and Full text, with the Full text tab selected.

If the document contains more than one match, you can jump back and forth between the matches in the full text using the *Show next hit* (arrow pointing downwards) and *Show previous hit* (arrow pointing upwards) buttons.

You can also display the hits in the *Results text* table column. Enable the *Results text* option under *Ribbon > User menu [your name] > Configuration > Display > Search*.

Display mode for search results

With the default settings, the search results are displayed as a list. You can also view search results as a tile, table, or tree structure. You can access the settings via *Toolbar > Display options*.



Outlook

You will find more information on the search here:

- 'Search' work area: General use, wildcard search, phrase search
- 'Search' tab

Assign substitute

Substitutions ensure that your tasks are completed even if you do not have access to ELO for a longer period of time.

You can create substitutes and activate them immediately or later on.

Please note

A substitution rule can only be changed or deleted by the

- creator,
- the main administrator,
- the sub-administrator,
- or the supervisor of the user being substituted.

Information for administrators

When upgrading from ELO 11 or older versions, the active substitution rules are transferred and applied. This means that substitutions remain active for an unlimited period of time, substitution rights remain inactive with the right *May activate/deactivate outside a scheduled period*. This requires ELO Indexserver 20.01 or a higher version.

Method

1. On the ribbon, click *User menu [your name] > Assign substitute*.
2. Select your substitute using the input field or from the drop-down menu.

You can be substituted for by other users or by groups.

3. To configure more exact settings for your substitute, click the respective substitute.

As long as you haven't configured any settings for a substitute, their status will be *Incomplete*. With this status, the substitute cannot be used. You can configure settings either right away or later on.

You can configure different settings for different substitutes. For example, you can plan your substitutions in advance and edit their settings after the fact.

In the *Users with substitution rights* list, you see the users/groups that are designated as substitutes. Active substitutes are marked green. Incomplete substitutions are marked yellow. To

complete a substitution, at least one of the options *Active substitution in this period* and *May activate/deactivate outside a scheduled period* must be enabled AND one of the options *Substitute inherits everything* or *Restrict substitution*. At least one of the boxes below the option *Restrict substitution* must be selected.

Settings

The following options are available for assigning a substitute:

- You can set a period during which another user automatically acts as your substitute.
- This gives the other user the right to substitute for you. In this case, they have to activate the substitution themselves.

Period: The *Active substitution in this period* option enables the input fields for the period. If you remove the check next to this option, the input fields are disabled. Entered periods are retained and can be reactivated later on.

You can define the following periods:

- A definite period with a start and end
- An unlimited period
- Multiple definite and/or unlimited periods

If you have defined a substitution with an unlimited period, you can end the substitution by deleting the period with the X icon.

Information

Periods are not deleted automatically; you have to delete them by clicking the X icon.

Substitution rights: If you enable the *May activate/deactivate outside a scheduled period* option, the substitute is allowed to activate or deactivate the substitution. This gives them permission to substitute for you in general without you defining a substitution period.

Substitution scope: You can individually configure how many rights you want to give your substitutes.

Select one of the following options:

- Substitute inherits everything
- Restrict substitution

Important

If you enable the option *Substitute inherits everything*, your substitute will have access to all documents, tasks, and functions that you have access to. This includes your personal documents, tasks, and notes that otherwise only you can see.

Substitute inherits everything: The substitution is assigned all your rights. The substitute will have access to:

- Documents in ELO (including personal ones)
- Files in your Intray
- Your personal tasks and workflows
- Group memberships and group tasks
- Notes (including personal ones)
- Client functions

Restrict substitution: You can individually configure how many rights you want to give your substitutes. You must enable at least one of the following three options:

- Personal tasks and workflows: If you enable this option, your substitute can access tasks and workflows that you have been assigned personally, not those given to you as a member of a group.
- Intray access: If you enable this option, your substitute has access to your Intray.
- Inherit group membership: Use the drop-down menu to select which of your groups the substitution applies to. The substitute is assigned the user rights, permissions to entries, annotations, feed entries, and group tasks associated with the group. This allows you to create multiple substitutes for the same period and allocate permissions for different groups. Only the groups that allow substitution are available for selection.

Please note

To allow your substitute access to documents in your Intray, the documents must already have been saved on the server. You can enable this setting under *User menu [your name] > Configuration > Advanced settings > Settings for the Intray work area > Save Intray on server when logging off*. If necessary, contact your system administrator.

The screenshot shows the ELO Java Client interface. At the top right, there is a user menu with a profile picture of a person named Cole. An orange box highlights this profile picture. Below the user menu, there are two tabs: "News" and "Most recently used". Underneath these tabs is a search bar and a settings gear icon. On the left side, there is a "Filter" section with a "New since" dropdown containing options: Today, Yesterday, One week, and One month. The "One month" option is selected. To the right of the filter, there is a "Current hashtags" section with "#Invoice" and "#InvoiceSmith". Below this is a box labeled "Substitution" which contains "My substitutes" and "Anderson". This entire "Substitution" box is also highlighted with an orange border. At the bottom right, there is a section titled "My recently started workflows".

If you are currently being substituted for, you will recognize this based on the orange figure next to your *User menu [your name]*.

You will also see on your *My ELO* start screen that you are being substituted for.

Forward substitutions

Substitutions are not forwarded automatically.

This means: Cole has appointed Anderson as his substitute. In turn, Anderson appoints a different user as her substitute. This user does not receive the tasks, rights, etc. that Anderson is given as substitute for Cole.

May forward substitution: By enabling this option, you allow your substitute to pass on the substitution to another user.

Even in this case, the substitution is not forwarded automatically – the user has to forward it actively.

Use this option with caution to prevent rights from being forwarded unintentionally within the company.

Additional information

- Accept substitution
- Show substitution tasks
- View substituted user's Intray

Add and search annotations

Add annotations

Annotations include sticky notes, text notes, and stamps. Annotations are affixed to a single page of a document. You can only place annotations, text notes, and sticky notes on documents that can be displayed in the document viewer (PDF, TIFF, JPEG, ...).

The following example shows how to do this using a sticky note. The method is similar for other types of annotations.

Please note

If you want to use the stamp tool, you must have been assigned permission to at least one stamp in the ELO Administration Console.

Information

Margin notes are not the same as annotations. Margin notes are placed next to the document on the split bar and refer to all pages of a document.

Requirements

- You require a PDF or TIFF document.

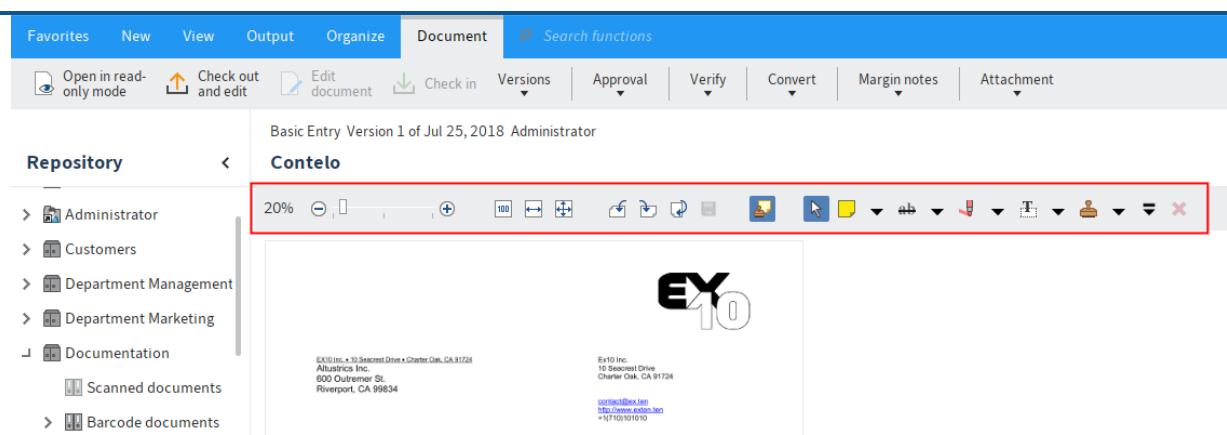
Method

1. In the *Repository* work area, click the document that you want to place an annotation on.

The document is shown in the viewer pane.

Information

You can assign permissions so that not all users can see or edit annotations. You will find the permissions settings for sticky notes and text notes under *Ribbon > User menu [your name] > Configuration > Annotations*. You define the permission settings for stamps in the *Stamps overview* dialog box. You will find more information here: [Add stamps](#).



The document viewer toolbar is displayed above the document in the document viewer.

Apply a sticky note

2. Click the sticky note icon on the document viewer toolbar to enable the *Sticky note* function.

Information

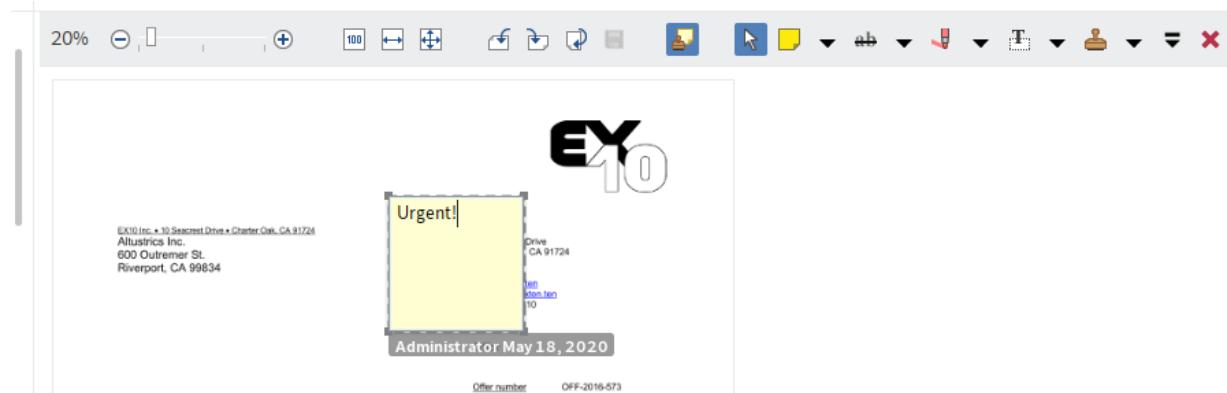
To use an annotation function multiple times in succession, hold down the ALT GR key as you click the function. To return to normal mode, click the *Select* function (cursor icon).

Optional: To change the color, click the triangle next to the sticky note icon and select a different color from the drop-down menu.

The cursor turns into a sticky note in the color you selected.

3. Click the part of the document you want to place the sticky note on.

The sticky note is created. The dotted border indicates that the sticky note can be edited. The editor and the current date are displayed below the sticky note.



4. Enter text.

5. Click the area outside of the sticky note.

Result

The text you entered is saved. The sticky note is displayed on the document.

Information

Double-click the sticky note to edit it. To delete a sticky note, select the sticky note with the selection tool and then click *Delete* in the document viewer toolbar.

Information

You can use the context menu to open e-mail addresses, ELO links, and web pages in a sticky note (Available in: *Right-click > Open links*).

Add stamps

You can create new stamps or edit existing ones.

Information

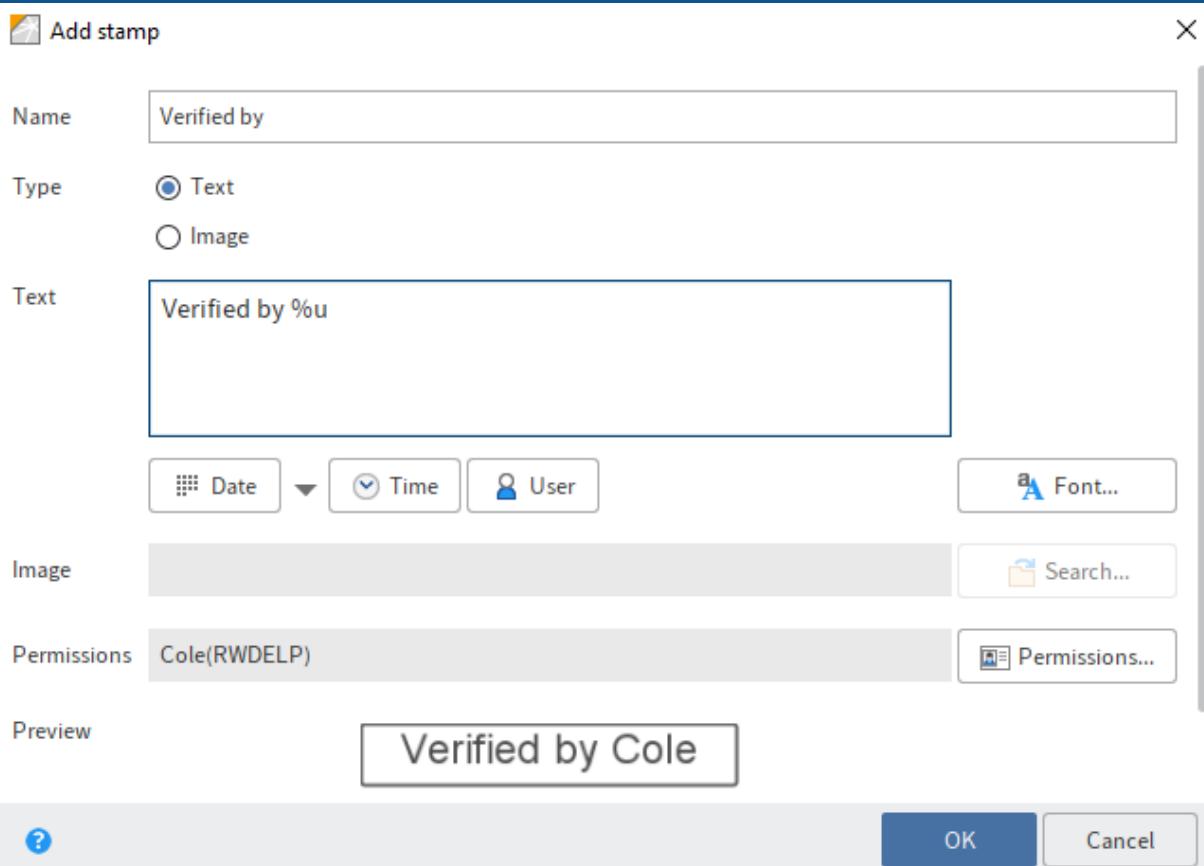
Default stamps cannot be edited or deleted.

Method

1. In the viewer toolbar, click the triangle icon next to the stamp icon.
2. In the drop-down menu, select the *Stamps overview* button.

The *Stamps overview* dialog box opens.

3. In the *Stamps overview* dialog box, click the *Add* button.



The *Add stamp* dialog box opens.

In this dialog box, select the name as well as the text or image for a stamp. The following settings are available:

- **Text:** Enter the word or the words that will be attached to the document with a text stamp.
- **Date:** The current date is added to the stamp text. Appears in the text field as `%d{dd.MM.y}`.
 - **Other usable formats:** Click the triangle icon to open a drop-down menu of other formats. Here, you will find examples of additional time and date formats that you can insert into the *Text* field.
- **Time:** The current time is added to the stamp text. Appears in the text field as `%X`.
- **User:** The name of the user is added to the stamp text. Appears in the text field as `%u`.
- **Font:** Set the font, the font size, and the font color for a text stamp in the *Font* dialog box.
- **Search:** Select an image for an image stamp. The image is displayed in the *Preview* area.
-

Image (for image stamps): The file name of the selected image is displayed in the *Image* field.

- Permissions: You can assign permissions for using stamps in the *Permissions* dialog box.

4. Click *OK* to save the stamp.

Result

The stamp appears in the drop-down menu that you open using the triangle icon next to the stamp icon.

Outlook

You can select the stamp you want to use from the drop-down menu.

To edit stamps of your own, select a stamp in the *Stamps overview* dialog box and click *Edit*.

Search annotations

The *Search metadata* function can be used to search for margin notes and annotations.

Requirements

- There must be at least one document in ELO that contains an annotation or margin note.

Method

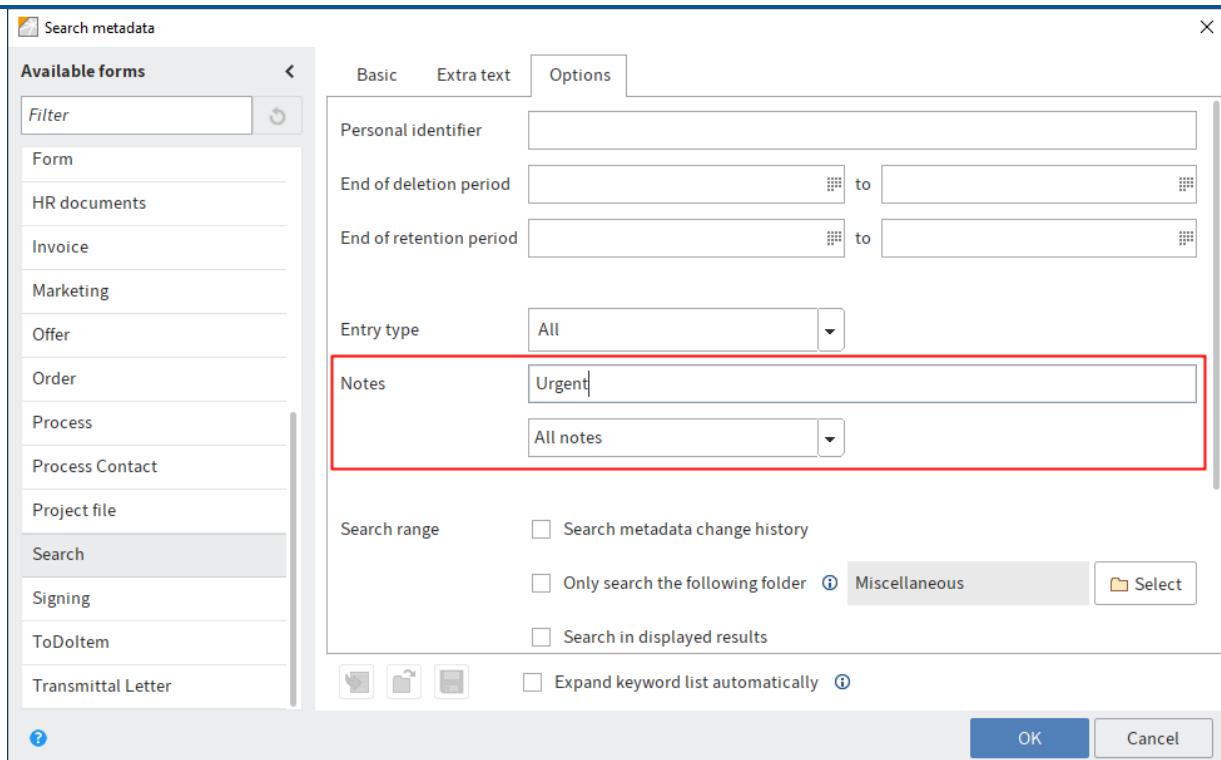
1. Open the *Search* work area.
2. On the ribbon, click *Search > Search logic > Search metadata*.

Keyboard shortcut: CTRL + F

The *Search metadata* dialog box opens. The default search form is selected.

Optional: Select a different search form if required.

3. Click the *Options* tab.



4. Enter a search term in the *Notes* search field.

Information

If you want the search to include annotations that do not contain any text, enter an asterisk (*) in the search field.

Optional: You can select the type of notes you want to search for from the drop-down menu under the *Notes* field.

5. Click *OK*.

Result

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

User menu [your name]

Configuration

This dialog box is where you make system settings for the ELO Java Client. The dialog box consists of the following areas:

- [Display](#)
- [Color scheme](#)
- [Dialog boxes](#)
- [Metadata](#)
- [Document preview](#)
- [Quick access to functions](#)
- [Annotations](#)
- [Advanced settings](#)
- [Technical presets](#)

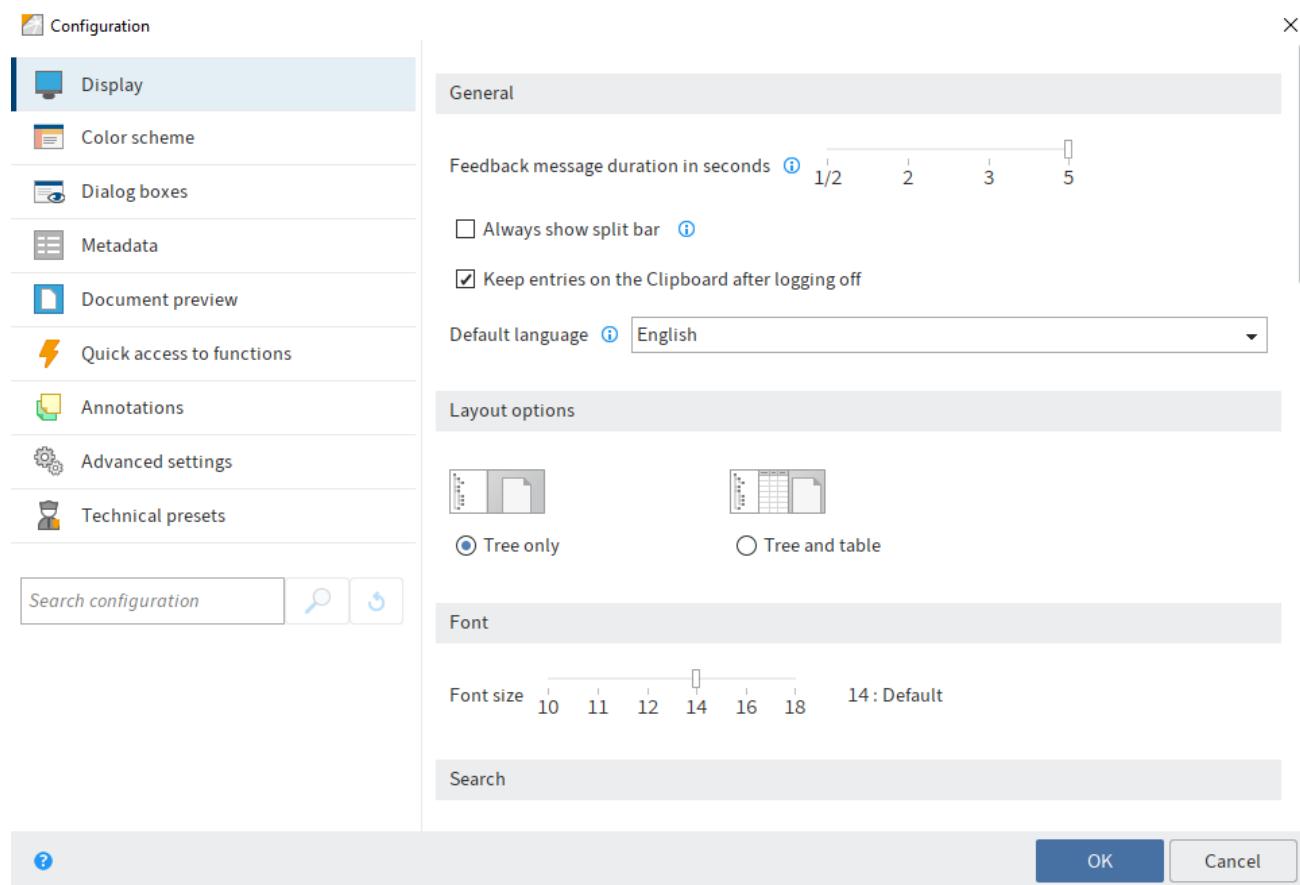
Search configuration

You can search all options in the configuration.

Enter a search term in the *Search configuration* field. To start the search, click the *Start search* button (magnifying glass icon) or press the ENTER key. To reset the search, click the *Reset search* button (arrow icon).

You can either make the desired setting in the results list or go to the corresponding area of the configuration by clicking on the header.

Configuration – Display



You will find the following settings in the *View* area of the *Configuration* dialog box.

General

Feedback message duration in seconds: For actions without displaying a confirmation window, a notification is displayed in the top area of the program window. Use this option to set how long the notification is shown in seconds.

Always show split bar: You can show the split bar permanently in the viewer pane for entries. If you disable this option, the split bar is only shown if margin notes are available.

Keep entries on the Clipboard after logging off: This setting enables you to save the contents of the Clipboard when closing the program.

Default language: Change the language of the client in the drop-down menu.

Layout options

There are two layout options for the *Repository* work area:

- **Tree only:** The filing structure is displayed in a tree view. The entry is displayed to the right.
-

Tree and table: In addition to the tree and entry, a table is displayed that shows the content of the element selected in the tree.

Font

Font size: Define the font size for the ELO Java Client user interface here.

Information

The ELO Java Client restarts automatically when you change the font size.

Search

Storage duration of the search entries in iSearch: Choose an option for the storage duration of the search results.

New search view for every metadata search: Select this option if you do not want to overwrite an existing search view when starting a search. A separate search view is created for each new search.

Search results context: Choose whether to display the *Hits* column or the *Results text* column in the search result list. To improve search performance, select the *Disable* option.

Number of synonyms: Use the spin box to specify the maximum number of synonyms suggested for a search term. To disable synonyms, select the value 0.

Maximum number of search results per page: Define in this area how many search results are displayed per page. The higher the number of search results per page, the longer the search takes. If the number of search results exceeds the defined number, you can access the other search results via the arrow buttons below the table with the search results.

Number of search suggestions per field: Specify how many search suggestions are displayed in a metadata field during the search.

- Minimum value: 50
- Maximum value: 10000

Information

If the value is too low, you may not get any suitable suggestions for some search queries.

The screenshot shows a search interface with a top bar containing 'Start search' and 'in all areas'. Below this is a dropdown for 'Filed by' and another for 'Metadata form'. A search input field says 'Filter/Apply with ENTER'. A list of names follows:

Name	Count
Cole	(2)
Administrator	(45)
Anderson	(72)
Byte	(2)
ELO Service	(11)
Farrell	(2)
Santini	(8)

Number of index columns for the metadata in the tasks and search results tables: Search results and tasks are shown in table form. The table columns correspond to the fields from the metadata. In this area, you specify how many fields from the metadata you want to display.

The screenshot shows the ELO Java Client interface. At the top, there is a search bar with the text "invoices", a "Start search" button, and a dropdown for "in all areas". Below the search bar are filters for "Entry type", "Date", "Filed by", and "Metadata form". To the right, a table titled "EX10_2020_Invoice_Cont" is displayed with columns "Type" and "Short name". A context menu is open over the table, specifically over the column headers. The menu is titled "Restore table columns" and contains the following options with checkboxes:

- Type
- Link
- Short name
- Date
- Hits
- Relevance
- Filed by
- Version
- Metadata form

Lists and tables

Show version in the tree view: Select whether and what version information to show in the tree view after the short name.

Show document date in the tree view: If you enable this option, the document date is shown in front of the short name.

Show folder date in the tree view: If you enable this option, the folder date is shown in front of the short name.

Show contents of priority fields in the tree view: If you enable this option, the contents of the fields marked as priority fields in the metadata form are displayed after the short name in the tree view. You will find the setting for priority fields in the ELO Administration Console under *System settings > Field templates > Properties > Field with high priority*.

Show version information in additional columns: Select this option to show additional information on the entries. This includes the editor of the last version, the version comment, the version date, and the version size.

Number of priority fields in the table columns: Define the maximum number of columns with high priority that may be displayed in tree view. A column with high priority is used to display a field of a metadata form. You will find the setting for priority fields in the ELO Administration Console under *System settings > Field templates > Properties > Field with high priority*.

Information

Having a large number columns will mean it takes longer to load the view.

Maximum size of thumbnails in pixels: Define the maximum size of the thumbnails in this area. Enter the length of the longest side in pixels. The size of the thumbnails can also be changed with the zoom function.

Task list display options

Refresh interval for the list in minutes: Specify how often you want the task list to be refreshed by entering a value to the field *Refresh interval for the list in minutes*. If the tasks list is not updated automatically, enter 0.

Show tasks due in the following number of days: The task list in the *Tasks* work area contains an overview of all due tasks. Use this option to specify in how many days a task must be due for it to be displayed in the task list. For example, if you enter 10 days, all tasks that are due in the next 10 days will be displayed. Tasks that are only due in 20 days are not displayed.

Maximum number of tasks displayed: With this option, you specify the maximum number of tasks that are displayed in the task list of the *Tasks* work area.

Information

This setting only refers to the number of displayed tasks and *not* to the total number of tasks in ELO.

List of recently used entries

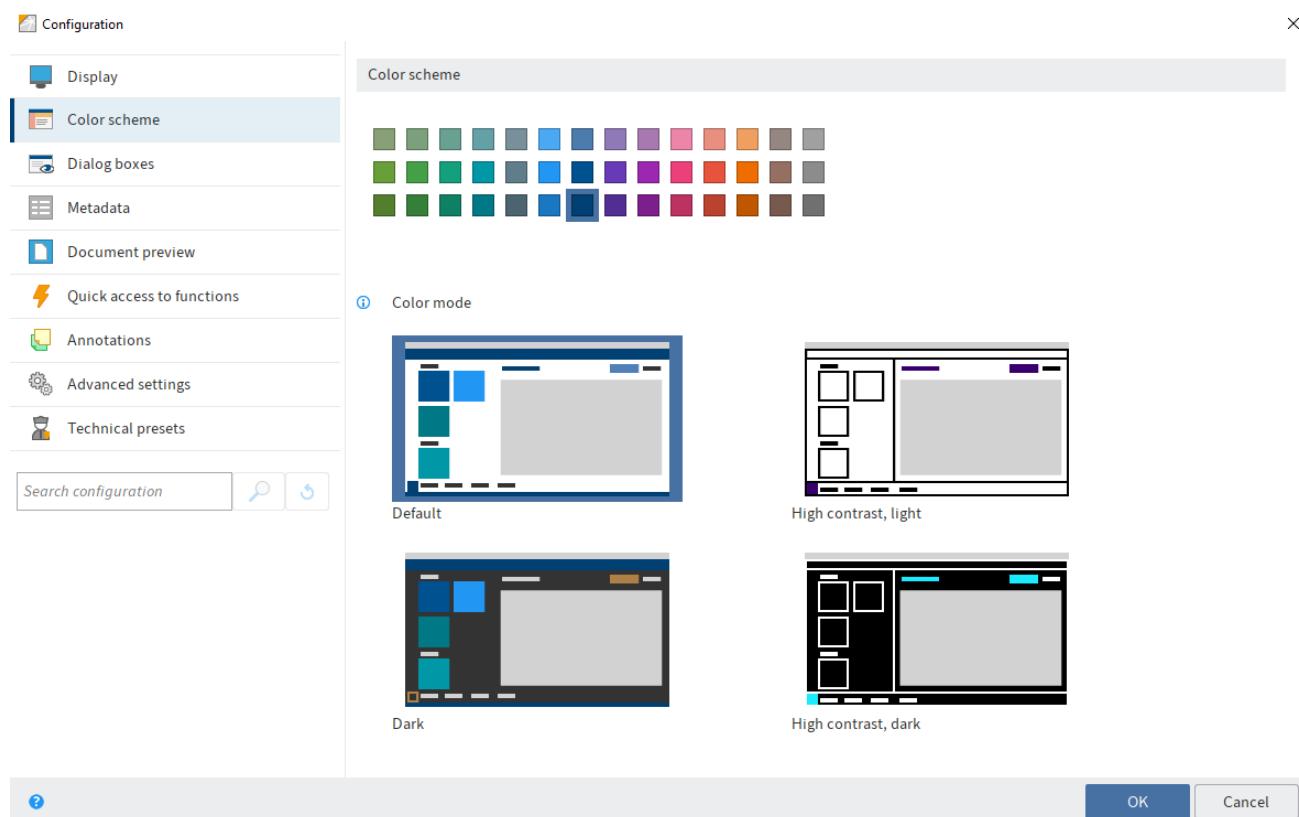
Maximum number of documents in the "Most recently used" list: Use this option to define the maximum number of recently used entries that are shown. You will find the overview of recently used entries in the *My ELO* work area.

Include stored documents and folders: If you enable this option, the list will also include documents you stored in ELO and folders you created.

Save selected entries after the set period: If this option is enabled, you will also see entries that you have selected in the viewer pane but have not executed a function on.

Use the slider to set how much time should pass before an entry you selected appears in the list. If you view an entry for a shorter time than set, it won't appear in the list.

Configuration - Color scheme



You will find the following settings in the *Color scheme* area of the *Configuration* dialog box.

Color scheme

Choose the color scheme for the ELO Java Client program interface in this area.

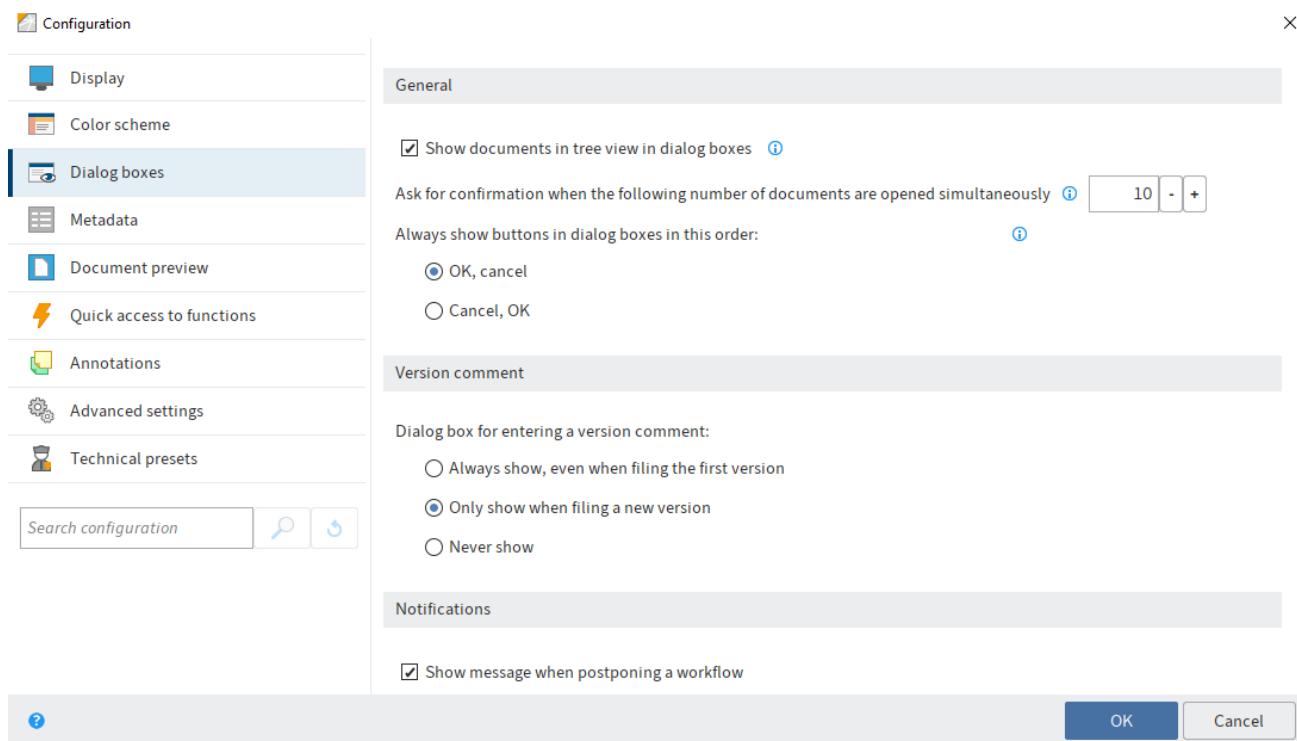
You can change the display mode via the preview images. You can select from four display modes:

- Default
- Dark
- High contrast, light
- High contrast, dark

Information

The ELO Java Client restarts automatically when you change the color scheme or the display mode.

Configuration - Dialog boxes



You will find the following settings in the *Dialog boxes* area of the *Configuration* dialog box.

General

Show documents in tree view in dialog boxes: If this option is selected, the documents are displayed in dialog boxes with a tree view. If the option is disabled, only the folder structure is displayed.

Ask for confirmation when the following number of documents are opened simultaneously: When you open or edit many documents at the same time, it can take a while for them to load in the client. Use this option to specify how many documents you can open or edit at the same time.

Always show buttons in dialog boxes in this order: This option enables you to specify the order of the *OK* and *Cancel* buttons in the dialog boxes.

Version comment

Dialog box for entering a version comment: When you store a new version of a document, you can enter a comment for this version. Select an option for displaying the version dialog box.

Information

Show message when postponing a workflow: If you select this option, you will be notified that the postponed workflows will be hidden in the task list.

Show message if retention period was set: If you select this option, a notification window is displayed when closing the *Metadata* dialog box. The message only appears if you have entered a retention period on the *Options* tab. In this case, you will be notified that you cannot delete a document with a retention period before the deadline has expired.

Show message if metadata does not contain a personal identifier: If this option is enabled, a message is displayed when closing the *Metadata* dialog box if the fields *Personal identifier* and *Deletion period* are empty.

Show message when setting the document status to "Non-modifiable": Define whether you want to display a message when setting the *Non-modifiable* document status.

Show message when deleting files in the Intray: Documents in the Intray have not been filed to ELO yet. If you delete documents in the Intray, the documents (and metadata) are removed and cannot be restored. Select this option to show a message when deleting Intray documents. You will be asked to confirm the deletion process.

Show message in the "Metadata" dialog box when changing metadata forms: If you select this option, a message is displayed when you assign the entry a different metadata form in the *Metadata* dialog box. The message only appears if a field that you already edited does not exist in the new metadata form.

Show message when removing your own read or write permissions: Specify whether to display a message when a user wants to revoke their own read or write permissions.

Show message when overwriting existing metadata with serial filing: Specify whether to display a message when overwriting existing metadata with serial metadata.

Show message when searching for multiple terms in different areas of iSearch: Specify whether to display a message when you perform a search with multiple terms in multiple areas (full text, metadata, and feed). When you perform a search with multiple terms, only results containing all the search terms are found.

Show restart required message when activating/deactivating a substitution: Specify whether you want a message to be displayed when you activate or deactivate a substitution. Changes to substitutions do not take effect until you restart the client.

Annotations when sending as PDF

In this area, you specify how annotations on a document are handled when creating and sending a PDF file.

Please note

When you create a PDF, margin notes on the split bar are not embedded. The embedded annotations can no longer be edited.

- Confirm via a dialog box: A dialog box opens. In this dialog box, you can choose how to proceed with the annotations.
 -

- Do not embed annotations: The annotations will not be embedded in the PDF.
- Embed annotations in the PDF file: The annotations will be embedded into the PDF during conversion.

Inherit permissions when moving entries

Behavior for differing permissions when moving documents: In this area, specify what to do with permissions when moving an entry in the repository. Choose from the following options:

- Confirm via a dialog box: A dialog box opens. In this dialog box, you can choose how to proceed with permissions when moving entries.
- Keep previous permissions unchanged: The moved entries retain the previous permissions.
- Replace with the permissions of the target folder: The moved entries inherit the permissions of the target folder.
- Replace permissions inherited from the previous folder, keep individual permissions: The moved entries inherit the permissions from the target folder. Any additional permissions will be retained.

Drag-and-drop

Behavior when dragging a file within the repository: This is where you specify the settings for moving entries in the *Repository* work area using drag-and-drop.

Choose from the following options:

- Confirm via a dialog box: A dialog box opens. This is where you specify whether the entry is moved or referenced.
- Move: The entry is moved to the new position without confirmation.
- Reference: The entry remains at its original filing location. A reference to the entry is created at the target location with confirmation.

Behavior when dragging a file to a document in ELO: This is where you specify the settings for dragging an external document onto a document that already exists in ELO.

Choose from the following options:

- Confirm via a dialog box: A dialog box opens. In the dialog box, you can determine what ELO should do in each case.
- File as a new version of the document: This creates a new version of the document.
- Attach to front: The file is attached to the front of the document you have dragged it to.
- Attach to back: The file is attached to the end of the document you have dragged it to.
- File as new document in ELO: The document is filed to ELO as a new document.
- File as a new document with the same metadata: The document is filed to ELO as a new document. The new document is filed with the same metadata as the document that you drag the file to.

Information

If you have selected the *File as a new version of the document* option, you cannot drag and drop onto a checked-out or deleted document.

Confirm via dialog box if you want to cancel metadata entry when filing multiple documents: If this option is enabled, a dialog box will appear if you cancel the metadata entry asking whether you want to file the documents with the default metadata. If the option is not enabled, the action is aborted without asking you for confirmation.

Duplicate check

Behavior when filing a duplicate: When filing documents, the client recognizes whether the document already exists in ELO. This is where you specify how to proceed with duplicates.

Choose from the following options:

- Confirm via a dialog box: A dialog box opens. In the dialog box, you can determine what ELO should do in each case.
- Reference: Automatically creates a reference. The entry only exists once in ELO.
- File again: The document is stored in duplicate.

Load new version

Behavior with an identical new document version: This option refers to the *Load new version* function. Available in: *Ribbon > Document > Versions*

This determines how the program behaves when an identical document is loaded as a new document version using the *Load new version* function.

Choose from the following options:

- Confirm via a dialog box: A dialog box opens. In the dialog box, you can determine what ELO should do in each case.
- Cancel loading the new version: No new version is created.
- File as new version anyway: Creates a new version with identical content.

Check in

Behavior when checking in an unmodified document: This option refers to the *Check in* function. Available in: *Ribbon > Document*

Choose from the following options:

- Confirm via a dialog box: A dialog box opens. In the dialog box, you can determine what ELO should do in each case.
- Cancel editing and restore original version: A new version is not created.
- File as new version anyway: Creates a new version with identical content.

Delete reference

Behavior when deleting a reference: Use this option to specify whether you want a dialog box to appear before deleting a reference and what ELO should do if the dialog box is deactivated.

Choose from the following options:

- Confirm via a dialog box: A dialog box opens. In the dialog box, you can determine what ELO should do in each case.
- Delete reference only: If this option is enabled, a dialog box will not appear. Only the reference will be deleted. The original document will not be deleted.
- Delete original and reference: If this option is enabled, a dialog box will not appear. The reference and the original document will be deleted.

Multiple entries as link

Behavior when creating a link when multiple entries are selected: Use this setting to define the program behavior when sending multiple entries as an ELO link.

Choose from the following options:

- Confirm via a dialog box: A dialog box opens. In the dialog box, you can determine what ELO should do in each case.
- Create one ELO link for each entry: This option creates an ELO link for each entry sent.
- Create one ELO link for all entries: This option creates one ELO link for all entries.

Print separator pages

Behavior when printing a separator page: This is where you specify the type of separator page to be printed.

Sometimes, separator pages are needed, e. g. for the *Join pages* function. To print a sample separator page, click *New > Scan > Scan profiles > Print separator page* on the ribbon.

Choose from the following options:

- Confirm via a dialog box: A dialog box opens. In the dialog box, you can determine what ELO should do in each case.
- Print separator page with horizontal bar: This option prints separator pages with a horizontal bar..
- Print separator page with vertical bar: This option prints separator pages with a vertical bar.

Delete from the Clipboard

Behavior when deleting from the Clipboard: When you select this option, a message appears when you delete an entry on the Clipboard. You must select whether you want to only remove the entry from the Clipboard or delete it in ELO as well.

Choose from the following options:

-

Confirm via a dialog box: A dialog box opens. In the dialog box, you can determine what ELO should do in each case.

- Remove from Clipboard: The entry is deleted from the Clipboard but remains in ELO.
- Delete in ELO: The entry is removed from the Clipboard AND deleted in ELO.

Delete from the search

Behavior when deleting in the search: This option enables you to specify how the program behaves when you delete a document in the *Search* work area.

Choose from the following options:

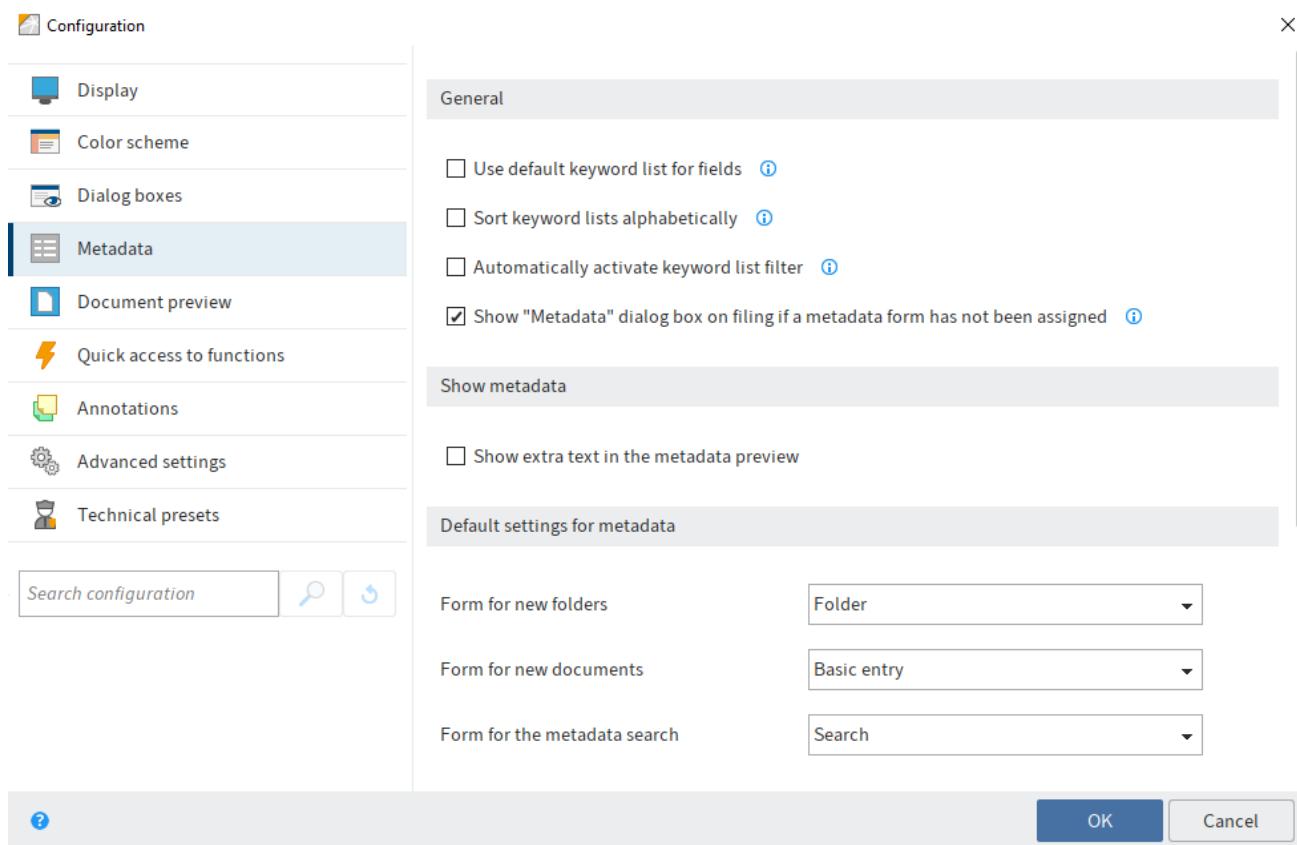
- Confirm via a dialog box: A dialog box opens. In the dialog box, you can determine what ELO should do in each case.
- Remove from search results: The entry is removed from the search results but remains in ELO.
- Delete in ELO: The entry is removed from the search results AND deleted in ELO.

Logon dialog box

Show logon dialog box when closing the program: If this option is selected, the logon dialog box is displayed when closing the program.

Show dialog box for selecting functional roles during logon: If a user has been assigned functional roles (e. g. administrator), a dialog box for enabling the roles opens when the users logs on.

Configuration - Metadata



You will find the following settings in the *Metadata* area of the *Configuration* dialog box.

General

Use default keyword list for fields: Select this option to use a default keyword list (global) for fields without a separate keyword list.

Sort keyword lists alphabetically: Select this option to sort keyword lists alphabetically.

Automatically activate keyword list filter: When this option is enabled, the keyword list is filtered automatically based on the characters entered when assigning metadata.

Show "Metadata" dialog box on filing if a metadata form has not been assigned: Select this option to open the *Metadata* dialog box when filing a new document. The dialog box only appears if the document has not been assigned a metadata form. If the option is disabled, the document is automatically filed with the default metadata form for new documents. The file name is used as the short name.

Show metadata

Show extra text in the metadata preview: Enable this option to display the text entered on the *Extra text* tab of the *Metadata* dialog box in the metadata preview.

Default settings for metadata

Form for new folders: Specify which metadata form to use for new folders.

Form for new documents: Specify which metadata form to use for new documents.

Form for the metadata search: Select the metadata form that is used by default for the metadata search.

Metadata form for different file types

In this area, you can link file extensions to metadata forms. The file extension is recognized when you file a document. The associated metadata form is set by default. When filing without metadata, the linked metadata form is used automatically.

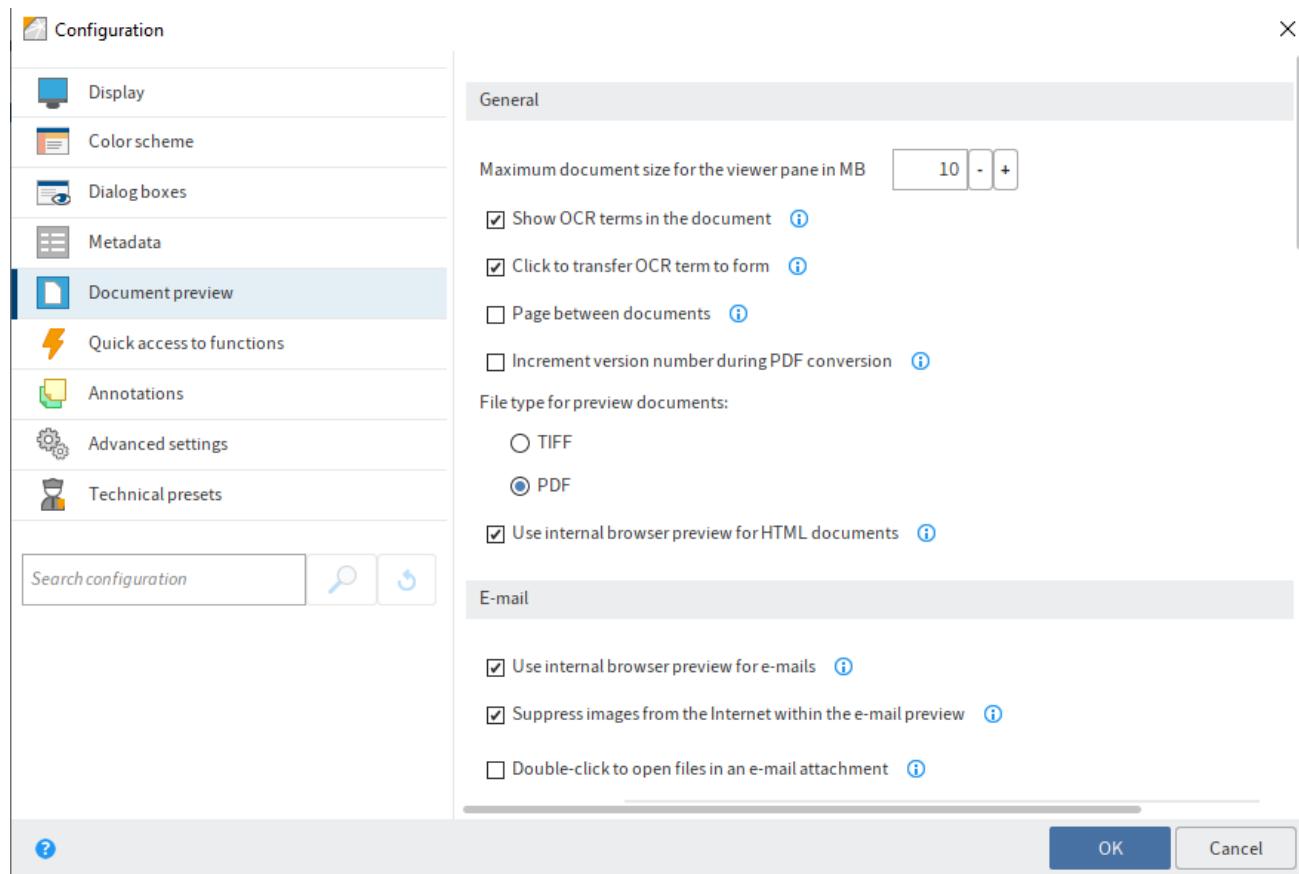
By default, the *.js* and *.vbs* file extensions are linked to the *ELOScripts* metadata form and the *.eml* and *.msg* file extensions are linked to the *E-mail* metadata form.

Use default: The *Use default* button restores the original settings in this area.

New: The *New* button adds a new row for linking a file type to a metadata form. Enter a file extension and select a metadata form.

X: The *Remove mapping* button (X icon) remove the corresponding line.

Configuration - Document preview



You will find the following settings in the *Document preview* area of the *Configuration* dialog box.

General

Maximum document size for the viewer pane in MB: Specify the maximum number of megabytes (MB) a document can have in the preview. If a document exceeds the defined size, a notification will be displayed instead of the preview. The value 0 disables the preview.

Show OCR terms in the document: Select this option to highlight the words in the document recognized by OCR. As soon as you point to a word, the word is highlighted. If the *Metadata* dialog box is open, you can click a word in a document to add it to the metadata.

Click to transfer OCR term to form: Transfer words recognized by OCR to the currently open form with a click.

Page between documents: If you enable this option, you can go straight to the next document when you reach the start or the end of the original document in the viewer pane.

Increment version number during PDF conversion: If this option is enabled, the document version is incremented during PDF conversion.

File type for preview documents: This setting refers to the *Create document preview* function. Specify whether to display preview documents in TIFF or PDF format.

Please note

Depending on the selected format, the correct ELO printer (ELO TIFF Printer or ELO PDF Printer) must be installed.

Use internal browser preview for HTML documents: If this option is enabled, HTML documents are displayed with the internal browser instead of the embedded Internet Explorer.

E-mail

Use internal browser preview for e-mails: If this option is enabled, e-mails are displayed with the internal browser instead of the embedded Internet Explorer.

Suppress images from the Internet within the e-mail preview: If this option is selected, images in e-mails that are downloaded from the Internet will not be displayed. However, embedded images in e-mails will be displayed.

Double-click to open files in an e-mail attachment: In this field, you can enter the file extensions that you want to open by double-clicking. For all other file extensions, a dialog box for saving the e-mail attachment opens.

Information

You can enter multiple file extensions. You need to separate the entries with periods.

Certificates for decrypting e-mails: This option allows you to specify where ELO should import the certificates for decrypting e-mails from.

- Use Windows certificate store: If you are using ELO on a Microsoft Windows system, you can use the certificates supplied by Microsoft Windows.
- Use certificate store from specified path: If you are not using ELO on a Microsoft Windows system, or if you do not want to use the certificates supplied by Microsoft Windows for other reasons, you need to select this option. In addition, you must specify where you want to store the certificates in the *Path* field.

Preview configuration for different file types

In this area, you specify which type of preview to use for different file extensions. If a preview class is not defined for a file extension, the browser will be used for the preview.

Use default: The *Use default* button restores the original settings in this area.

New: The *New* button adds a new row for linking the file type and preview method. Enter a file extension and select a preview method.

Confirm: When displaying this file type, ELO will ask every time whether you want to open the file with the default viewer.

X: The *Remove mapping* button (X icon) remove the corresponding line.

Choose from the following options for configuring the preview:

- ActiveX plug-in preview: This preview type now supports viewer plugins from the ELO Windows Client.
- Apple OS X preview: Viewer for displaying files on the macOS operating system
- Image preview: Viewer for JPG, BMP, and TIFF that can be used to place annotations on documents.
- Browser preview: Preview in the standard browser.
- Code preview: Viewer with syntax highlighting for displaying code.
- DXL preview: Viewer for documents in DXL format.
- EML e-mail preview: Viewer for IBM Notes e-mails in .eml format.
- Windows Media Player preview: Preview for audio and video files based on JavaFX.
- MSG e-mail preview: Viewer for Microsoft Outlook e-mails in .msg format.
- Windows Media Player preview (Windows): Preview in Windows for audio and video files.
- MS Office preview (Windows): Recommended viewer for Microsoft Office documents newer than 2003. Also suitable for Apache OpenOffice documents (ODT).
- OpenOffice preview: Viewer for Apache OpenOffice documents. Requires an installation of Apache OpenOffice including an additional module or LibreOffice compatible with the Java version used in the ELO Java Client.
- PDF preview: Viewer for PDF documents with which annotations are affixed to documents. As an alternative, you can use Internet Explorer with the Acrobat Reader plug-in (the annotations on the document are not shown).
- Text preview: Viewer for text files; allows two font types, adjustable font size, and automatic line breaks.
- Show preview document: With this setting, preview documents created previously are shown instead of the original documents.
- ZIP preview: Viewer for ZIP folders, shows file contents as a tree. Files can be displayed or saved to disk from the context menu.

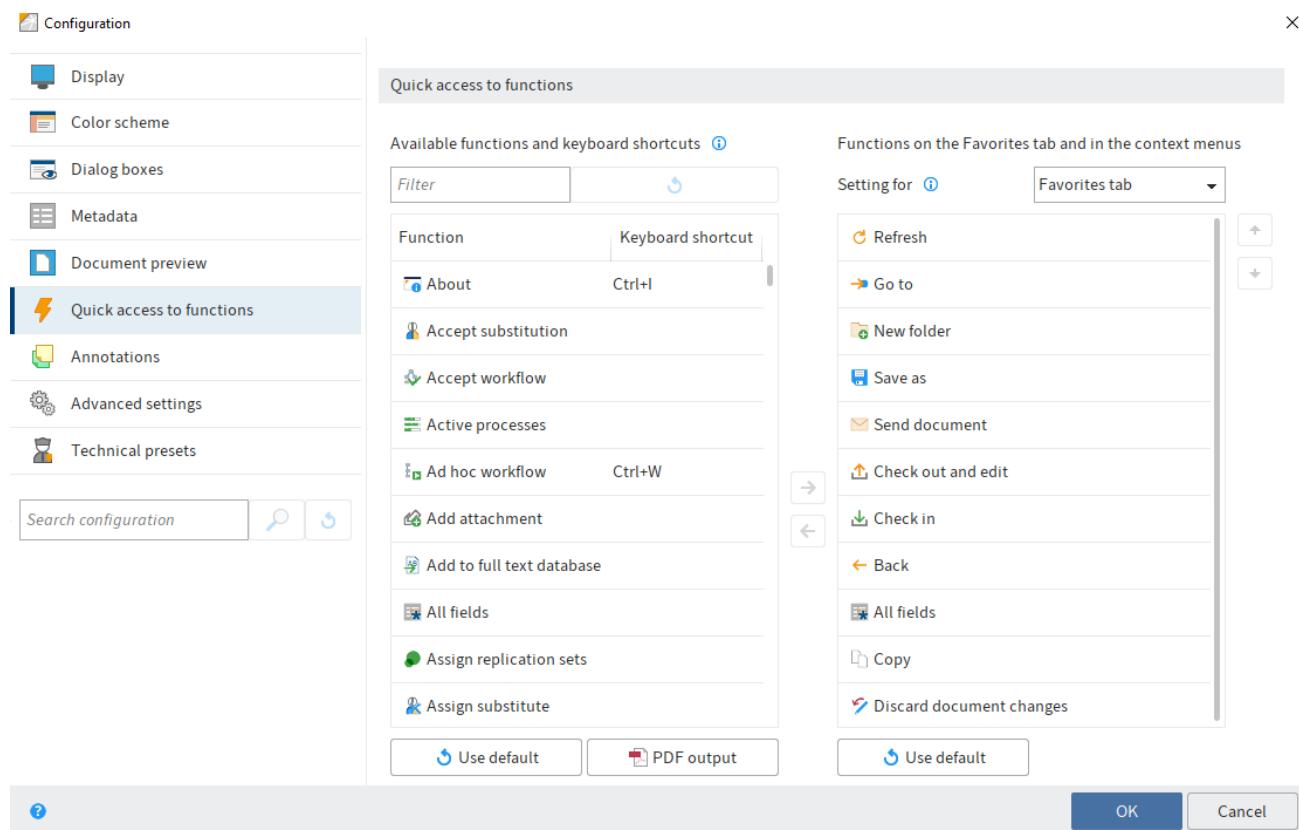
Preview plug-ins

In this area, you can link file extensions to preview plug-ins.

New: The *New* button adds a new row for linking the file type and preview plug-in. Enter a file extension and the corresponding OLE object ID.

X: Click one of the buttons with an X icon to delete the corresponding row.

Configuration - Quick access to functions



You will find the following settings in the *Quick access to functions* area of the *Configuration* dialog box.

Quick access to functions

Available functions and keyboard shortcuts: In the *Available functions and keyboard shortcuts* column, select the function that you want to add to the *Favorites tab* or a context menu. To add a function, select the function and click *Add function* (arrow icon pointing to the right).

Filter: Use the *Filter* field to filter the *Available functions and keyboard shortcuts* column. The column is updated as soon as you enter a character.

Reset filters: Click the *Reset filters* button to delete the current filter from the *Filter* field. All functions are displayed.

Functions on the Favorites tab and in the context menus: In the column *Functions on the Favorites tab and in the context menus*, you can see which functions are already on the *Favorites tab* or in the selected context menu.

Settings for: Use the *Settings for* drop-down menu to choose whether you want to edit the *Favorites tab* or one of the context menus.

The following items are available for selection:

-

Favorites tab

- Entry context menu (context menu for entries in the repository)
- Tasks context menu
- Intray context menu

Information

Functions only appear in the context menu if they are executable in the given context.

Assign keyboard shortcuts to function

You can assign keyboard shortcuts to functions in the *Available functions and keyboard shortcuts* column.

Method

1. Select the function you want to assign a keyboard shortcut to.

The function is now marked as selected.

2. Enter the desired keyboard shortcut, e.g. CTRL + L.

Please note

Some keyboard shortcuts are already in use by the operating system or other programs. This applies in particular to the function keys F1 to F12. You can assign keyboard shortcuts to the function keys but the commands will not be executed. Keyboard shortcuts at the operating system level are executed first..

Result

Enter the keyboard shortcut in the field to the right of the function.

Delete keyboard shortcut

Method

1. Select the function with the keyboard shortcut you want to delete.
2. Press the BACKSPACE key.

Result

The keyboard shortcut is deleted.

Reset keyboard shortcuts

You have the option to restore all keyboard shortcuts to default values. Click the *Use default* button below the *Available functions and keyboard shortcuts* column.

Keyboard shortcuts as PDF file

You can save an overview of the keyboard shortcuts as a PDF file. Click the *PDF output* button below the *Available functions and keyboard shortcuts* column.

Add function

Method

1. Use the *Settings for* drop-down menu to choose where you want to add a function.
2. Select the desired function in the *Available functions and keyboard shortcuts* column.
3. Click *Add function* (arrow icon pointing to the right).

Information

The *Separator line* function can be added as often as you like. The separator line is used to group functions and to set them apart from one another.

Result

The function is displayed in the *Functions on the Favorites tab and in the context menus* column.

Change order

You can change the order of the entries on the *Favorites* tab and in the context menus.

1. Use the *Settings for* drop-down menu to choose what you want to edit.
2. Select the desired function in the *Functions on the Favorites tab and in the context menus* column.
3. Click the *Move up* button (arrow pointing upwards) to move the selected function up.

Alternative: Click the *Move down* button (arrow pointing downwards) to move the selected function down.

Remove function

1. Use the *Settings for* drop-down menu to choose what you want to edit.
2. Select the desired function in the *Functions on the Favorites tab and in the context menus* column.
3. Click *Remove function* (arrow icon pointing to the left).

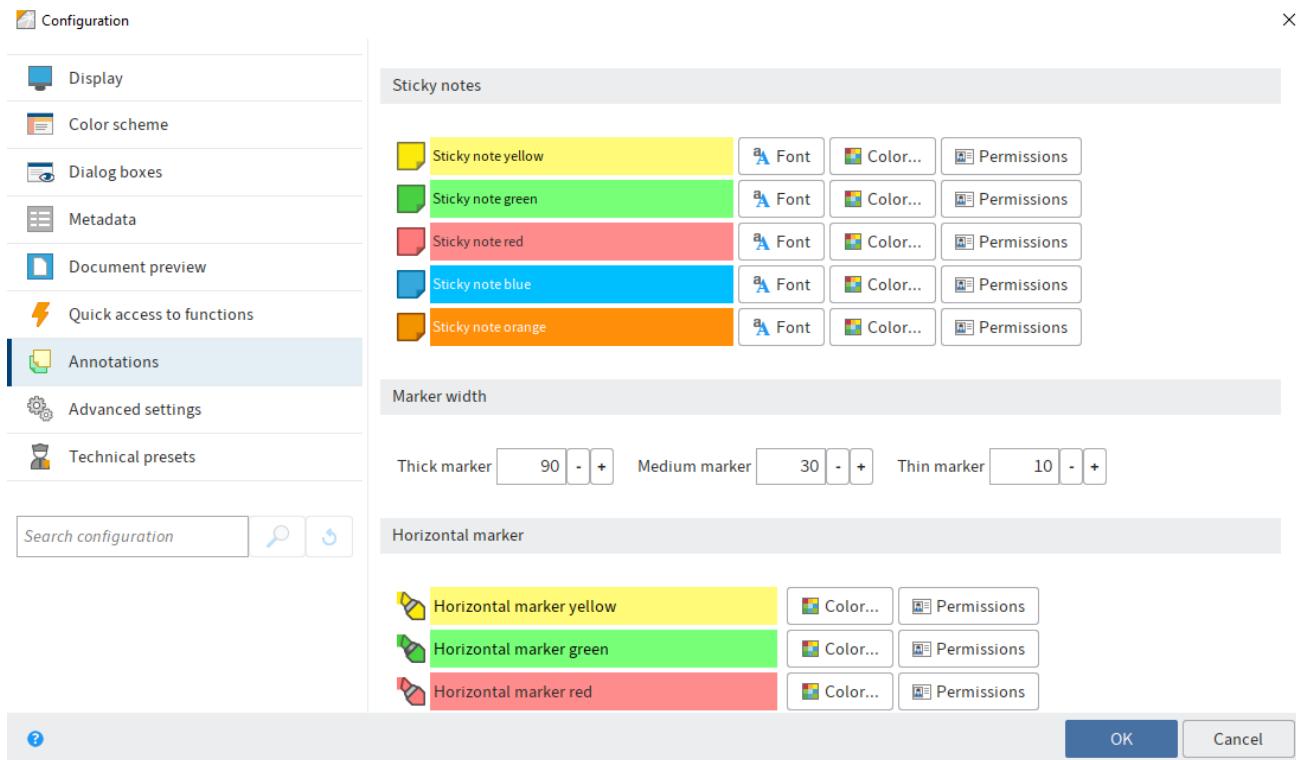
Information

You can also add or remove functions by double-clicking them.

Reset functions

You can also restore the default settings of the *Favorites* tab or the context menus. Click *Use default* below the *Functions on the Favorites tab and in the context menus* column.

Configuration - Annotations



You will find the following settings in the *Annotations* area of the *Configuration* dialog box.

Sticky notes

A sticky note is a colored text field that you can place directly on a document to record information. There are five different colors available for sticky notes. The default colors are yellow, green, red, blue, and orange. You can define these colors individually.

You can make the following settings:

Font: Click *Font* to open the *Font* dialog box. You can set the font, font size, font style, font color, and permissions for each type of sticky note here.

Color: The *Color* button opens the *Select color* dialog box. Use the dialog box to change the color of the respective sticky note.

Permissions: Click *Permissions* to open the *Permissions* dialog box. Use the dialog box to define the permission settings for the respective sticky note type.

Marker width

The *Horizontal marker*, *Freehand marker*, and *Strikethrough* tools are available in three different sizes (widths). You can define the widths of the markers with the *Large marker*, *Medium marker*, and *Small marker* fields.

Information

The values are about the same as the point size, depending on the font. For example, if you enter the value 12, this corresponds approximately to the width of a line in 12-point *Arial* font.

Horizontal marker

You can define five types for the *Horizontal marker* tool. You can define the colors and permissions for each type.

Color: The *Color* button opens the *Select color* dialog box. Change the color of the respective marker in the dialog box.

Permissions: Click *Permissions* to open the *Permissions* dialog box. Define the permission settings for the respective marker in the dialog box.

Freehand marker

You can define five types for the *Freehand marker* tool. You can define the colors and permissions for each type.

Color: The *Color* button opens the *Select color* dialog box. Change the color of the respective marker in the dialog box.

Permissions: Click *Permissions* to open the *Permissions* dialog box. Define the permission settings for the respective marker in the dialog box.

Rectangle marker

You can define five types for the *Rectangle marker* tool. You can define the colors and permissions for each type.

Color: The *Color* button opens the *Select color* dialog box. Change the color of the respective marker in the dialog box.

Permissions: Click *Permissions* to open the *Permissions* dialog box. Define the permission settings for the respective marker in the dialog box.

Strikethrough

You can change the settings of the *Strikethrough* tool.

Color: The *Color* button opens the *Select color* dialog box. Change the background color of the *Strikethrough* tool in the dialog box.

Permissions: Click *Permissions* to open the *Permissions* dialog box. Define the permissions settings for the *Strikethrough* tool in the dialog box.

Redaction configuration

The *Redaction* tool can be used to render texts unreadable.

Information

For the *Redaction* function to be available, some settings must be made in the ELO database. You can find more detailed information in the documentation [ELO Redaction](#).

Permissions: Click *Permissions* to open the *Permissions* dialog box. Define the permission settings for redacting documents in the dialog box.

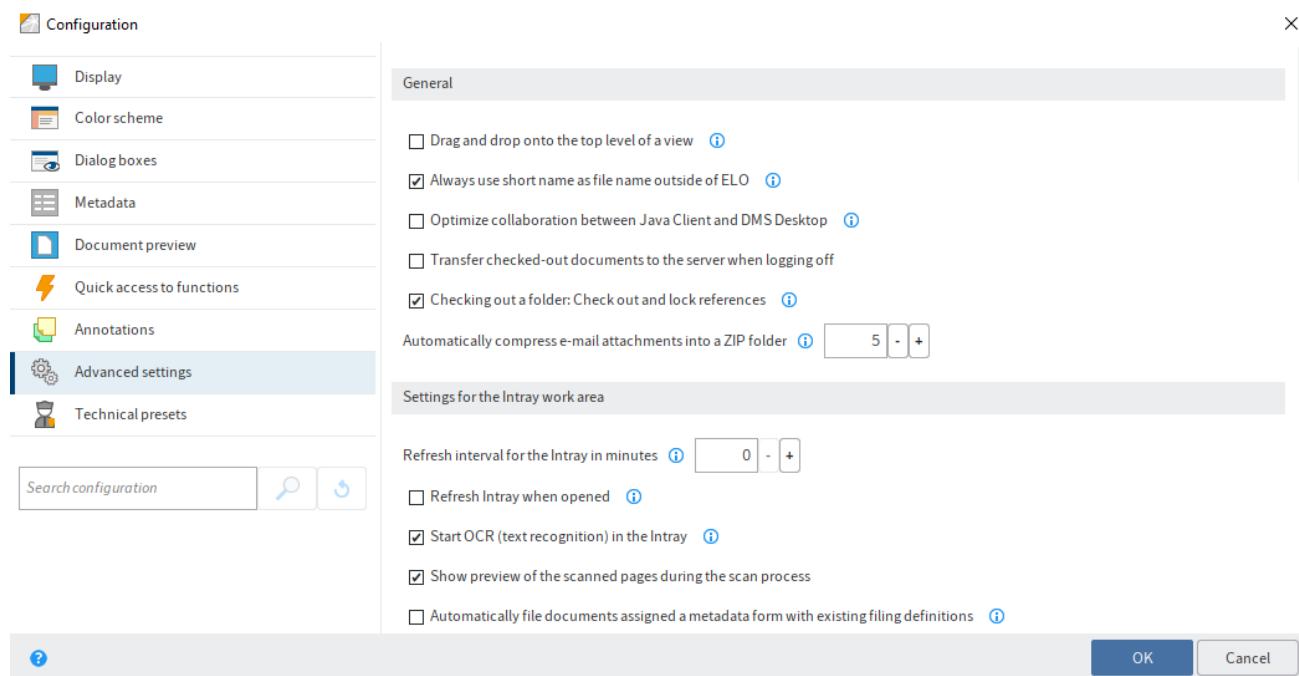
Text note configuration

You can define five types for the *Text note* tool. You can set the font, font size, font style, font color, and permissions for each type.

Font: Click *Font* to open the *Font* dialog box. You can set the font, font size, font style, font color, and permissions for each type of text note here.

Permissions: Click *Permissions* to open the *Permissions* dialog box. Define the permission settings for each type of text note in the dialog box.

Configuration - Advanced settings



The *Advanced settings* area of the *Configuration* dialog box contains the following settings.

General

Drag and drop onto the top level of a view: If this setting is selected, the entry is inserted at the top repository level when dragging and dropping onto a tile view. If this option is disabled, the entry is inserted at the location currently selected in the view.

Information

If a document is dragged to a view that only contains a branch of the repository, the document is filed at the top level of this view.

Always use short name as file name outside of ELO: Select this option to always use the short name of an entry as the file name. The file name is then used when sending a document by e-mail, for example. If this option is enabled, the *File name* field is ignored on the *Options* tab of the metadata form.

Optimize collaboration with ELO Desktop: This option should only be selected if the ELO Java Client is used together with ELO DMS Desktop. Select this option to avoid slow load times when opening Microsoft Office documents.

Transfer checked-out documents to the server when logging off: Select this option to save checked out documents to the server after the user logs off. If the user logs onto another workstation, they have access to documents that they have checked out.

Checking out a folder: Check out and lock references: This option is for checking out folders. If there are references in a checked-out folder, these are also stored in the checkout directory. To lock the references and original files when checking out folders, select the option *Checking out a folder: Check out and lock references*.

Please note

If you check out a folder with all the references, you cannot check in the references separately. Instead, you need to check in the entire folder. In addition, you cannot check in the original documents that are linked to the references until you have checked in the entire folder.

Automatically compress e-mail attachments into a ZIP folder: Enter a maximum value here. If the number of e-mail attachments exceeds this limit, the e-mail attachments will be automatically compressed into a ZIP folder.

Settings for the Intray work area

Refresh interval for the Intray in minutes: Enter a number greater than zero in the *Refresh interval for the Intray in minutes* field if you want the *Intray* work area to automatically refresh at regular intervals. The value 0 means that the *Intray* will not automatically refresh.

Refresh Intray when opened: Select this option to automatically refresh the *Intray* work area every time you open it. This also updates the monitored folders.

Start OCR (text recognition) in the Intray: Select this option to start text recognition as soon as a document is filed to the *Intray* work area. The text content of the document is available when entering metadata, for example.

Show preview of the scanned pages during the scan process: Select this option to display the preview of the scanned pages during the scan process.

Automatically file documents assigned a metadata form with existing filing definitions: Select this option to automatically file documents if you have entered all metadata and the documents have a valid filing definition. The documents are filed as soon as you close the *Metadata* dialog box by clicking *OK* or *Apply and next*. You do *not* need to run the Automatic filing function.

Information

You cannot create or edit metadata forms in the ELO Java Client. Contact your system administrator if you have any questions about automatic filing and the filing definition.

Automatically convert TIFF files to PDF when filing to ELO: TIFF files are automatically converted into PDF files when filed to ELO.

Create searchable PDFs: If this option is enabled, TIFF files are sent to OCR during automatic conversion to create searchable PDF files.

Join pages: Specify which type of separator pages to use for the *Join pages* function.

The following options are available:

- Separator page
- Blank page
- Delete separator page and blank pages
- Triangle to mark the first page

Save Intray on server when logging off: Select this option to save checked out documents to the *Intray* work area after the user logs off. If the user logs onto another workstation, they have access to their Intray documents.

Intray folder in the file system

Include child directories when moving to the Intray: Enable this option to include all child directories of the specified Intray directories when refreshing the *Intray* work area.

New: Click the *New* button to select a folder in the file system to use as the Intray folder.

Information

You can use the variables %USERTEMP% and %APPDATA% in the Intray folder.

Directory: The *Directory* field shows the path to the designated Intray folder.

X: Click the *Remove directory* button (X icon) to remove the corresponding link to a folder in the file system.

Workflow

Default duration for workflow postponement in days: You can defer a workflow for processing later on. Use this option to define the default settings in days for the *Postpone workflow* dialog box.

Start workflow in edit mode: Select this option to edit the selected workflow template when starting a new workflow. If this option is not checked, you only see a list of templates. In this case, you can open the workflow templates using the *Show template* button.

Show successor node users when forwarding workflows: The name of the successor node will be displayed in the *Forward workflow* dialog box in addition to the name of the user/group entered as the node editor.

Automatically refresh the "Workflow overview": This option allows you to specify whether the list of workflows in the *Workflow overview* dialog box is refreshed automatically.

Default name for new workflows: In this area, you specify the default settings for the name of new workflows. You can change the name when you start the workflow.

Choose from the following options:

-

- Name of workflow template
- Short name of entry
- Name of workflow template + short name of entry
- Short name of entry + name of workflow template

My ELO

This is where you define the settings for automatically subscribing to a feed.

Choose from the following options:

- When filing a document
- When creating a new folder
- When checking in a new version
- When creating a post or comment

Signature

Recognize signature files: In the *File extensions* field, specify which file extensions to recognize as signature files.

Information

You can enter multiple file extensions. You need to separate the entries with periods.

Save signature files: Select this option to save signature files in ELO.

Include signature file when sending documents: Select this option to send the associated signature file along with a document.

Automatically save the signature verification log as an attachment: Select this option to store the verification logs of the documents as an attachment.

Check signature on display: Select this option to run the signature check while displaying a signed document.

Behavior for signing PDF documents: In this area, you specify what to do when signing PDF documents.

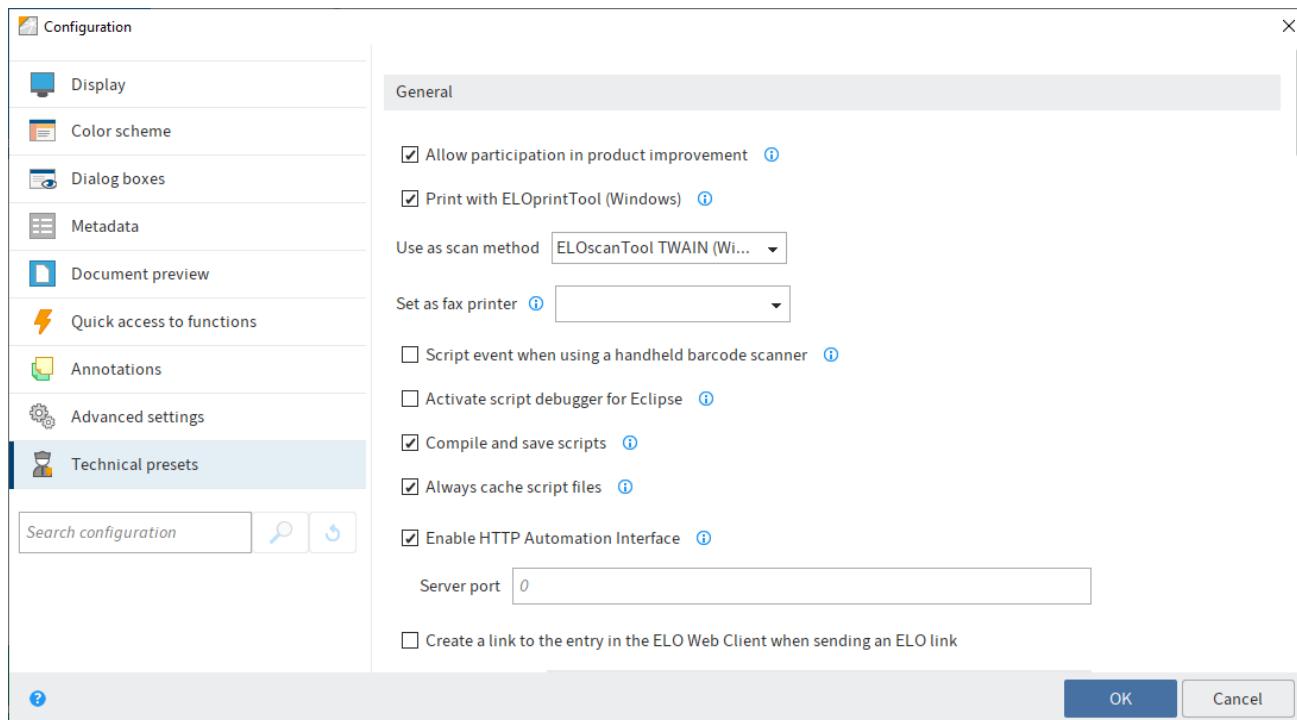
Choose from the following options:

- Confirm via dialog box
- Embed signature into document
- Create separate signature file

Behavior on double-click

In this area, you can define which action is performed when double-clicking a document in the *Repository*, *In use*, and *Search* work areas.

Configuration - Technical presets



The *Technical presets* area of the *Configuration* dialog box contains the following settings.

General

Allow participation in product improvement: Select this option to participate in ELO product improvement.

Print via ELOprintTool (Windows): Enable this option to print documents with the *ELOprintTool*.

Use as scan method: Select which scan method to use.

Please note

The *ELOscanTool* can only be used under Microsoft Windows and requires a 32-bit TWAIN driver.

Set as fax printer: To send a document as a fax, the document must be sent to a fax printer that processes the digital data and sends it to the recipient. Use this setting to specify which fax printer to use.

Barcode serial number: Enter a valid barcode serial number here if you want to use the barcode function at your workstation.

Information

This setting is only available to administrators.

Please note

Barcode serial numbers are unique to each workstation and may not be used multiple times.

Script event when using a handheld barcode scanner: If this option is enabled, the ELO Java Client sends a corresponding script event as soon as a handheld barcode scanner is recognized.

Activate script debugger for Eclipse: Select the *Activate script debugger for Eclipse* option to activate the script debugger for internal scripts. This will disable the internal script debugger (CTRL+ALT+D).

Compile and save scripts: Scripts are compiled once and then saved locally. This reduces the client execution time. If this option is enabled, you cannot use the JavaScript debugger.

Always cache script files: If this option is enabled, scripts are always stored in the local cache even if the document cache is cleared when you close the program. This reduces the client execution time.

Enable HTTP Automation Interface: Selecting the *Enable HTTP Automation Interface* option allows you to call scripting functions starting with the prefix *http* via the HTTP Automation Interface. To do so, you need to enter the corresponding port number in the *Server port* field.

The syntax must have the following format:

```
http://<server>:<port>/script/<script name>/?p1=<parameter value1>&p2=<parameter value2>
```

Server port: To call script functions via the HTTP Automation Interface, you need to enter the corresponding port number in the *Port* field.

Create a link to the entry in the ELO Web Client when sending an ELO link: If this option is enabled, a web link to the entry is embedded in the e-mail when sending an ELO link. This web link can also be used as an ELO link in the ELO Web Client.

Web Client URL: For the additional web link when sending an ELO link to work, you need to enter the ELO Web Client URL to the *Web Client URL* field.

Store cookies in integrated browser: If this option is enabled, ELO stored the internal browser cookies across sessions. Otherwise, the cookies are deleted when the client is closed.

Add references to full text database: If this option is enabled, references are included when adding to the full text database.

Display and refresh

Cache refresh interval in seconds: Use this option to set the refresh interval of the *Repository* work area. Work areas and settings are updated at this interval.

Limit display in large folders: If you open an entry with the *Go to* function, only the respective entry is displayed in the specified folders. This option speeds up the load time, since the other contents of the specified folders are not loaded. In the *Object IDs* field, specify the object IDs of the folders that you want to apply the restriction to.

Storage duration of thumbnails in the cache: The ELO Java Client stores the created thumbnails to a local cache. In this area, you specify when to delete the cache. Choose from the following options:

- Delete when closing ELO
- Delete after 30 days
- Never delete

Clear document cache on closing: If this option is enabled, the temporary file folder will be emptied when you close the ELO Java Client.

Maximum number of documents in the *In use* work area: In this area, you specify how many documents can be checked out at the same time. This prevents too many external applications from being started since this can impact system performance. The default value is 20.

Maximum number of pages in OCR preprocessing: This is where specify the maximum number of pages per document to evaluate during OCR preprocessing. The default value is 20.

Start search immediately when clicking a search favorite: The *Save search* and *Search favorites* functions on the *Search* tab enable you to save search favorites and use them repeatedly. Enable this option to immediately start the search when clicking a search favorite. If this option is disabled, the search favorite is added without starting the search.

Log file

The log file contains the automatic protocol of all or certain processes of an application.

You can make the following settings for the log file:

Write log file: Select this option to write a log file.

Open log file: Open the log file for viewing.

Send log file: Attach a log file as a TXT file to an e-mail.

Log file path: Define the storage location for the log file.

Information level: Define how detailed you want the information in the log file to be (default, script development, debug, or network debug).

Information

You can only make changes to the log file if there is no logger entry in the registry.

Date formats

Possible date and time formats: Use this button to show the variables for the configuration of the date and time formats.

Preview: This field shows what the date format would look like with the current settings.

Format for date and time entries: Specify the format for the date and time entries here. The format used is displayed as an example in the *Preview* field. The default setting is *Use standard Java date formats*.

Please note

If nothing is displayed in the *Preview* display field, the date entries will not be displayed in the client either.

Date format: If you have selected the *User-defined* option, you can choose a predefined date format in the *Date format* field or generate your own date format from the variables displayed under *Date and time format options*.

Time: If you have selected the *User-defined* option, you can choose a predefined time format in the *Time* field or generate your own time format from the variables displayed under *Date and time format options*.

Date format that should also be accepted for entries in ELO: If you have selected the *User-defined* option, you can select or create an additional date format that is also valid in ELO in the *Date format that should also be accepted for entries in ELO* field.

Replace date in tables with "Yesterday", "Today", and "Tomorrow" as required: Select this option to replace the date with *Yesterday*, *Today*, or *Tomorrow* as appropriate.

First weekday in the calendar: Use the drop-down menu to set the first day of the calendar week in ELO. The default value is *Monday*.

First calendar week: Use the drop-down menu to set when the first calendar week should start. With the default settings, the first calendar week starts on January 1.

Number formats

Separator for number entries: Specify the separators used for numbers here. The default setting is *Use standard Java separators*.

Thousands separator: If you have selected the *User-defined* option, you can enter a separator to mark numbers higher than one thousand in the *Thousands separator* field.

Decimal separator: If you have selected the *User-defined* option, you can enter a separator for numbers with decimal places in the *Decimal separator* field.

Show or hide work areas

You can hide or show the *Intray*, *Clipboard*, *Tasks*, *In use*, and *Search* work areas here.

Folder for document templates

Path: Define in which folder the document templates will be stored in ELO.

OCR (text recognition)

OCR recognition: Specify here whether you want to perform OCR in fast or detailed (but slower) mode.

Filter: Use the *Filter* field to filter the *Available languages* column. The column is updated as soon as you enter a character.

Reset filters: Click the *Reset filters* button to delete the current filter from the *Filter* field. All available languages are displayed.

Available languages: From this list, select the languages for text recognition that will be used to analyze the documents in ELO.

Information

The OCR service and languages are only available if an OCR instance has been installed.

Selected languages: In this list, you can see which languages have been selected for text recognition.

Enable roles

Roles are used to give users additional rights in ELO. For example, a role can grant a user membership to the *Administrators* group. You do not need the additional group rights for your everyday work, so you can enable them as and when required. You need to enable the role to get the corresponding rights in the client.

You can also enable the roles manually when you log on. This dialog box opens after you sign in to ELO.

Change password

You can change your password as often as you want. To change your password, you need your old password.

Information

Follow the instructions for choosing a secure password in the *Change password* dialog box.

If your new password is rejected, it does not meet the minimum password requirements at your company.

If you have forgotten your password, notify your system administrator.

Assign substitute

Use this function to create a substitution rule. You can specify which users are allowed to substitute for you in which period.

Please note

If you want to view, copy, or retrieve documents from another user's Intray, these documents must already have been saved on the server. You can enable this setting under *User menu [your name] > Configuration > Advanced settings > Settings for the Intray work area > Save Intray on server when logging off*. If necessary, contact your system administrator.

For more information, refer to the Important actions in detail chapter.

Accept substitution

This function enables you to accept a substitution request from another user. You can view the substitution tasks in your *Tasks* work area by clicking *Task > Display > Substitution tasks*.

The following options are available for accepting substitution:

- Another user has defined a period during which you automatically accept their substitution.
- Another user has given you the right to substitute for them. In this case, you have to activate the substitution yourself.

On the ribbon, click *User menu [your name] > Accept substitution*.

In the dialog box, you can see who you are currently substituting for or may substitute for.

I have the right to substitute for

On the left-hand side, you will see an overview of the users you have permission to substitute for.

Information

If you are a supervisor of other users, you automatically have the right to substitute for these users. Users for whom you are a supervisor are not automatically displayed in the overview. Select a user from the *Add employee* drop-down field. The *Add employee* field is only displayed if you have been assigned the role of supervisor in the user manager in the ELO Administration Console.

You will recognize active substitutions by a green bar to the left of the profile picture.

If you click a user, their exact substitute permissions are shown in the right-hand pane. This area is for information purposes only and cannot be edited.

Edit substitutions

You have the following options:

- Activate/deactivate: These buttons allow you to activate substitutions that are currently inactive or deactivate active substitutions you want to end. These buttons are only available if the user you want to substitute for has given you the right to activate and deactivate the substitution yourself.
- Forward: With this button, you can forward a substitution if the user you are substituting for has given you the corresponding right. You can either hand off the substitution entirely or assign an additional substitute.

The screenshot shows the ELO Java Client interface. At the top, there is a blue header bar with a user icon (highlighted with a red box), the name "Anderson" with a dropdown arrow, and a profile picture. Below the header, there are two tabs: "News" (selected) and "Most recently used". A gear icon is located in the top right corner of the main content area. On the left, there is a sidebar with a "Filter" section containing a "New since" dropdown with options: "Today" (radio button), "Yesterday" (radio button), "One week" (radio button, selected), and "One month" (radio button). To the right of the filter, under "Current hashtags", is the text "#Order". In the center-right area, there is a box with a red border containing the text "Substitution" and "I am substituting for Cole". At the bottom right, there is a link "My recently started workflows".

If you are currently substituting for another user, you will recognize this based on the blue figure next to your *User menu [your name]*.

You will also see on your *My ELO* start screen that you are substituting for another user.

Additional information:

- Assign substitute
- Show substitution tasks
- View substituted user's Intray

Edit profile

Feed posts are marked with the name and profile image of the author. You can edit your profile.

You can edit your profile in the following ways:

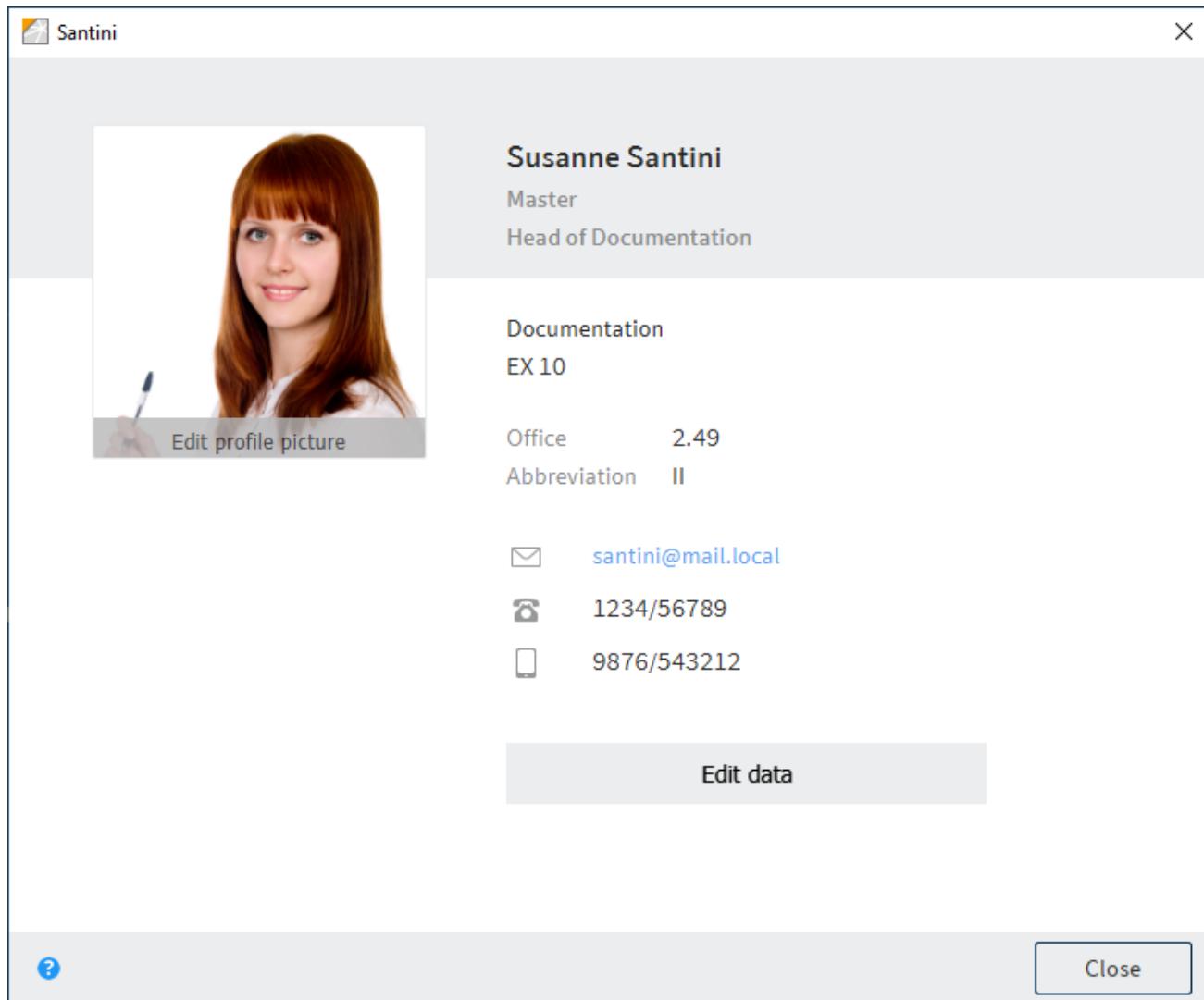
- On the ribbon, click *User menu [your name] > Edit profile*.
- In the *My ELO* work area, click *Settings* (gearwheel icon) > *My profile* (person icon at the top right).
- Click your user name or profile image in the feed.

Information

You can open the group profile via the feed if the group has been mentioned.

Information

Administrators with the *Edit user data* right can change images for other users.



In the *Profile* dialog box, you can edit your profile picture and profile data. Click either *Edit profile picture* or *Edit data*.

Edit profile picture

Click *Edit profile picture* to open edit mode. In edit mode, you can change or delete your own profile image.

Select picture: Click *Select picture* to open a dialog box to select a file from the file system. Select an image file to use as your profile image.

Information

Use PNG, JPG or GIF image files with a minimum of 280 x 280 pixels. If ELO is unable to process the format or the size of the selected image, a message will appear at the bottom of the dialog box.

For larger images, you can hold down the left mouse button to drag and select the desired section of the image.

Delete picture: Click *Delete picture* to delete your profile image. The dialog box remains open, but editing mode is closed.

Save: Click *Save* to apply the changed profile image. The dialog box remains open, but editing mode is closed.

Cancel: Undo the changes by clicking *Cancel*. The dialog box remains open, but editing mode is closed.

Edit data

Click *Edit data* to edit your profile data. You can enter and edit data in the fields provided.

You will find the following buttons below the input fields. You may need to scroll down.

Save: Click *Save* to apply the changed profile data. The dialog box remains open, but editing mode is closed.

Cancel: Undo the changes by clicking *Cancel*. The dialog box remains open, but editing mode is closed.

Close dialog box

Close: Click the *Close* button to close the dialog box. Any unsaved changes will be lost.

About

This dialog box contains program information, e. g. the version numbers of the ELO Java Client and ELO Indexserver. The version number is particularly important for support requests.

User feedback

This is where you can write feedback on the program and send it to ELO. You can enter an e-mail address if you want. This e-mail address will be used for enquiries.

Click *Privacy Policy* to read about data protection. To see a preview of your feedback message, select *Preview*.

Help

This launches the ELO in-program help function. This is where you will find the documentation for the ELO Java Client.

Active processes

Use this function to open an overview of processes running in the background. This includes, e. g. import and export processes.

You can view a detailed log for each process. You can save the log as a CSV file (comma separated values).

You can cancel current processes and click *Go to* button to go straight to the respective entry in the *Repository* work area.

You can remove one or all finished processes from the process overview.

Close

Close the ELO Java Client with this function.

Workspaces

Workspaces are workspaces in ELO for different functional levels. With the help of filters and different views, you can edit data and analyze it in charts and tables.

Workspaces are based on workspace types. These are created by administrators and define which views and filters are available to you. They also define which [objects](#) can be created in a workspace.

You can find more information about workspace types in the [ELO Workspaces](#) documentation.

Objects

Objects are a shell with metadata where entries can be compiled. Files and folders can be inserted in an object.

Connections between objects are not established via a hierarchical structure, but by [relations](#).

The [Create object](#) chapter explains how to create an object.

Relations

You can establish a connection between objects, for example between a job application and the position it was submitted for.



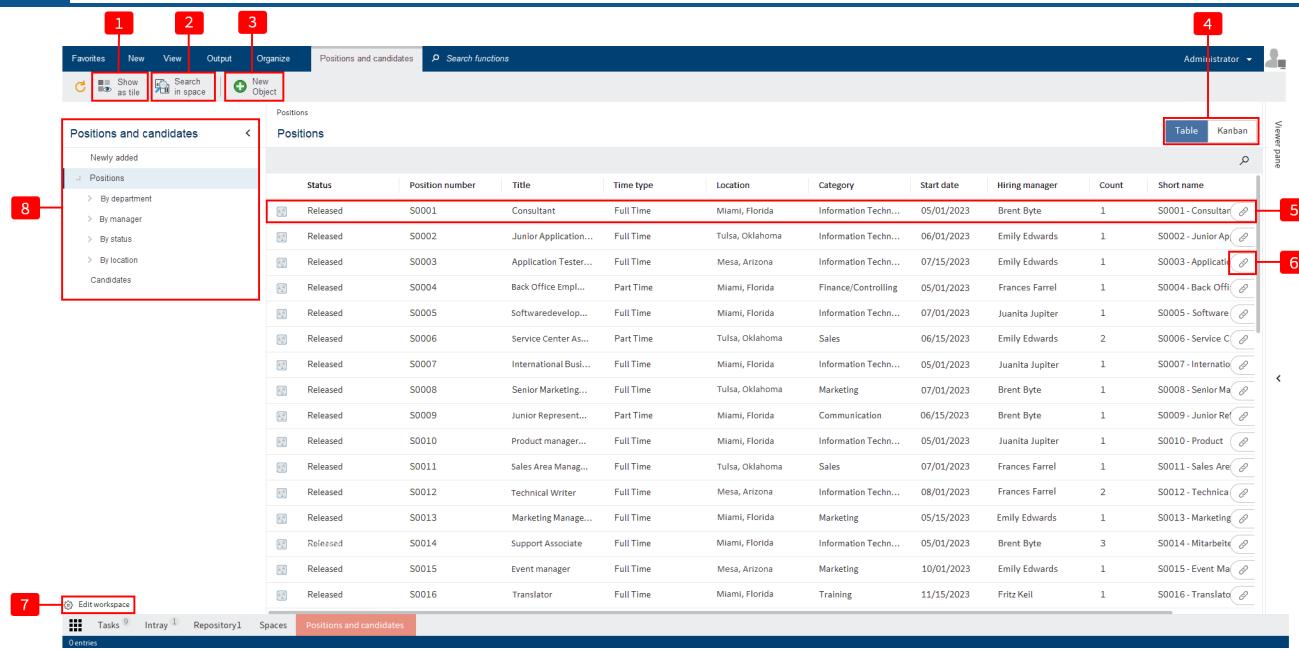
You establish these connections using relation fields. Relation fields can be found in the metadata form of an object.

In the [table view](#), a relation is indicated by a button with a chain icon.

If you've entered the corresponding position in the relation field of a job application, for example, the button with the chain icon takes you from the position to the application. This gives you an overview of all applications for a position.

Workspace home screen

Refer to the Spaces section to learn how to access a workspace.



You can access all the elements of the workspace via the home screen of a workspace. The ribbon features a tab with additional workspace functions.

You have the following options:

- 1 Show as tile: You can create a tile in *My ELO* that provides quick access to the workspace.
- 2 Search space: You can search the entries of the selected space. Refer to the chapter on Filters for a more detailed description of the search.
- 3 Create new object: You can create an object. For more information, refer to the [Create object](#) and [Objects](#) chapters.
- 4 Switch view: If multiple views have been created for a workspace, you can use the tabs to switch between views. There are [tables](#), [kanban boards](#), and [dashboards](#). The tabs are named by the administrator and are customized.
- 5 Show entry: You can select the chain icon to view entries that are related to the selected entry.
- 6 Select relation: You can view entries that are related to the selected entry.
- 7 Edit workspace: You can [edit the workspace](#) if you are authorized to do so based on your role.
- 8 Workspace filter tree: You can switch between the workspace filters. Filters can be single or multi-tier.

Edit workspace

The screenshot shows the ELO Java Client interface with the 'Edit workspace' page open. The top navigation bar includes 'Favorites', 'New', 'View', 'Output', 'Organize', 'Positions and candidates', and a search function. The right side of the header shows 'Administrator' and a user icon. The main content area is titled 'Workspace instance' and 'Positions and candidates'. It contains sections for 'Overview' (with fields for 'Workspace name' and 'Type name') and 'Permitted metadata forms'. Under 'Permitted metadata forms', there are two entries: 'CANDIDATE' and 'Position', each with a checkbox for 'Entries may be created manually'. A button for 'Add metadata forms' is also present. On the far left, there's a vertical sidebar with icons for 'Favorites', 'New', 'View', 'Output', 'Organize', and 'Edit'. On the right, there's a 'Viewer pane' with scroll bars.

You can edit the workspace here. In the [ELO Workspaces](#) documentation, you can find more information about the following:

- Overview
- Permitted metadata forms
- Views
- Filter trees
- Roles

Please note

When you edit the settings in one area, it is no longer linked to the corresponding area of the workspace type. Changes to the workspace type are therefore no longer automatically applied to this area in the workspace.

The *Roles* area can only be edited after the workspace has been created.

The following options are only available in the workspace:

▼ **Workspace member**

Add user/group

User/group ^

Roles



Administrator Administrator



Jupiter

Member, Administrator



You can [add members](#) to the workspace and set roles for them.

▼ **Delete workspace**

Deleting the workspace deletes all the entries contained. A deletion marker is set so that the workspace and its entries can be restored if necessary.

Delete workspace

You can delete the workspace.

'Workspace member' area

You have the following options:

Add user/group

Administrator



Select at least one role



Administrator

Member

You can change the role of workspace members with the drop-down menu. Workspace members can have multiple roles.

Jupiter

Member, Administrator



You can delete workspace members. Administrators can only be deleted by administrators. The last administrator cannot be deleted.

Table

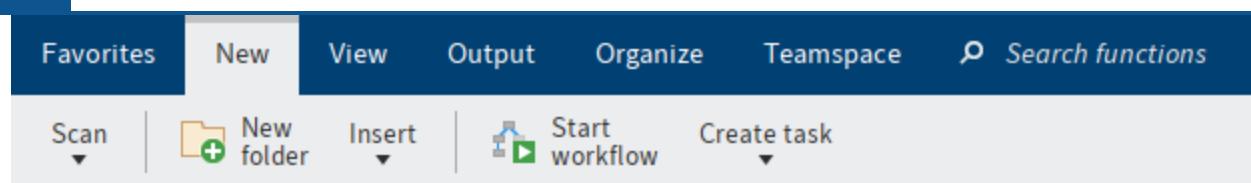
The screenshot shows the ELO Java Client interface with a "Positions and candidates" workspace selected. The main area displays a table titled "Positions" with the following columns: Status, Position number, Title, Time type, Location, Category, Start date, Hiring manager, Count, and Short name. The data in the table includes various job titles like Consultant, Junior Application..., Application Tester..., Back Office Develop..., Software developer..., Service Center As..., International Business..., Senior Marketing..., Junior Representative..., Product manager..., Sales Area Manager..., Technical Writer..., Marketing Manager..., Support Associate, Event manager, and Translator, all listed under the "Released" status. The "Count" column indicates the number of positions per entry, and the "Short name" column provides a brief identifier for each position.

In a table, you see all the entries that match the selected filters. The selection of filters is based on the workspace type.

You have the following options:

The screenshot shows a detailed view of a position entry titled "S0010 - Marketing manager for digitalization". The left side shows a list of other positions with columns for Status, Position number, and Position title. The right side shows the details for the selected position, including tabs for "Position" and "Organization". Under the "Position" tab, there are sections for "Position data" (Position title: Marketing manager for digitalization, Position number: S0010) and "Details" (Status: Released, Approver: Daniel Cooper, Number of positions: 1). The "Position data" section has a dropdown arrow indicating it can be expanded or collapsed.

You can select the filtered entries. The entry is shown and you can edit it in the *Metadata* tab. You can insert documents and folders for an entry and view them in the *Content* tab. This area works like the viewer pane in the repository.



You can edit the entries using the functions on the ribbon. You can also use the context menu for documents and folders associated with an entry.

The screenshot shows two tables side-by-side. The left table, titled 'Positions', has columns for Status, Position number, and Position title. The right table, titled 'Candidates', has columns for Status, First name, and Last name. A red box highlights the 'Candidates' button in the position table, which is associated with the selected row (S0022).

Status	Position number	Position title
Requested	S0022	Development  Candidates 
Open	S0012	Technical writer 

Status	First name	Last name
2nd Interview	Ines	Novosel
Hired	Eloise	Crespin
Interview	Lucas	Vieira

You can view entries that are related to the selected entry. The metadata of the entry has to contain a [relation field](#) that establishes the link.

The screenshot shows a feed post from 'ELO Service'. The post content is 'ELO Service created a new folder.' and it was posted on 'Apr 28, 2022, 10:09 AM'. There is a 'Comment' link below the post.

ELO Service created a new folder.
Apr 28, 2022, 10:09 AM
[Comment](#)

You can enter a feed post. The feed works as described in the chapter Feed.

Kanban board

The screenshot shows a Kanban board for books. The columns are labeled "available", "reserved", and "on loan". Each column contains several book entries with details like title, author, publisher, and genre. The "available" column has 20 items, "reserved" has 9, and "on loan" has 23. The "available" column is currently selected.

available	reserved	on loan
Title: 2061: Odyssey Three Author: Arthur C. Clarke Publisher: Del Rey Books Signature: O11 Genre: Science fiction	Title: Demon Night Author: J. Michael Straczynski Publisher: Berkley Pub Group Signature: O15 Genre: Science fiction	Title: Breakfast of Champions Author: Kurt Vonnegut Publisher: Dell Publishing Company Signature: V49 Genre: Science fiction
Title: Deadly Sleep Author: John Applegate Publisher: Pinnacle Books Signature: O14 Genre: Science fiction	Title: One Tree (Donaldson, Stephen R. Second Chronicles of Thomas Covenant, Bk. 2.) Author: Stephen R. Donaldson	Title: Chroniques martiniennes Author: Ray Bradbury Publisher: Gallimard Signature: I29 Genre: Science fiction
Title: Jurassic Park Author: Michael Crichton Publisher: Ballantine Books Signature: O29 Genre: Science fiction	Title: Tantras (Forgotten Realms: Avatar Trilogy, Book 2) Auteur: Richard Atwinnson Maison d'édition: Wizards of the Coast Signature: V62 Genre: Science fiction	Title: Das Meer und kleine Fische. Author: Terry Pratchett Publisher: Heyne Signature: O3 Genre: Science fiction
Title: Les Thanatonautes Author: Bernard Werber	Title: The Dolphins of Pern Author: Anne McCaffrey	Title: Deus Irae Author: Philip Kindred Dick

In a kanban board, entries are assigned to columns depending on the value of a specific status field.

You have the following options:

[Book](#)

[All books](#)

The screenshot shows a Kanban board for books. The columns are labeled "available" and "reserved". Each column contains several book entries with details like title, author, publisher, and genre. The "available" column has 463 items and the "reserved" column has 421 items. A red arrow points from a book entry in the "available" column to the "signature" field in the "reserved" column, indicating a drag-and-drop operation.

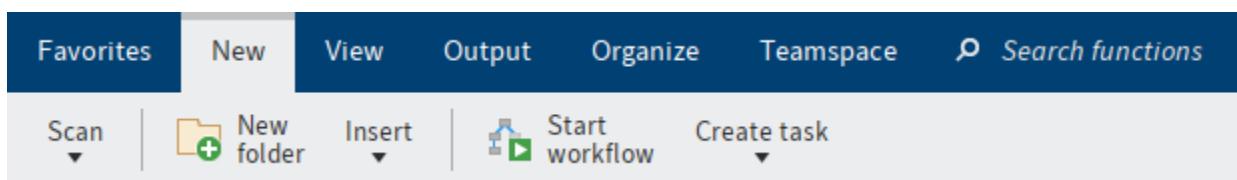
available	reserved
Title: 2061: Odyssey Three Author: Arthur C. Clarke Publisher: Del Rey Books Signature: O11 Genre: Science fiction	Title: 11th Hour Author: Bradley Warshauer Publisher: Pinnacle Books Signature: G46 Genre: Mystery

You can move entries via drag-and-drop. The corresponding value in the metadata changes.

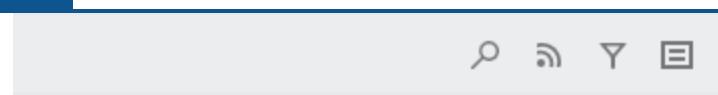
The screenshot shows the ELO Java Client interface. On the left, a Kanban board displays three entries: "Science fiction" (available 20), "Deadly Sleep" (available 20), and "Jurassic Park" (available 20). Each entry has details like Title, Author, Publisher, Signature, and Genre. On the right, a detailed view for the book "2061: Odyssey Three" is shown under the "Book" tab. The "Media data" section includes fields for Status (available), Media ID (1099), and Signature (O11). The "Media classification" section includes fields for Title (2061: Odyssey Three), Year (1991), and Genre (Science fiction).

Entry	Title	Author	Publisher	Signature	Genre
Science fiction	2061: Odyssey Three	Arthur C. Clarke	Del Rey Books	O11	Science fiction
Deadly Sleep	John Applegate	Pinnacle Books	O14	Science fiction	
Jurassic Park	Michael Crichton				

You can select the filtered entries. The entry is shown and you can edit it in the *Metadata* tab. You can insert documents and folders for an entry and view them in the *Content* tab. This area works like the viewer pane in the repository.



You can edit the entries using the functions on the ribbon. You can also use the context menu for documents and folders associated with an entry.



Create a post



ELO Service created a new folder.

Apr 28, 2022, 10:09 AM

[Comment](#)

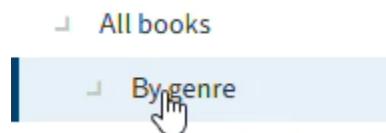
You can enter a feed post. The feed works as described in the chapter Feed.

Dashboard

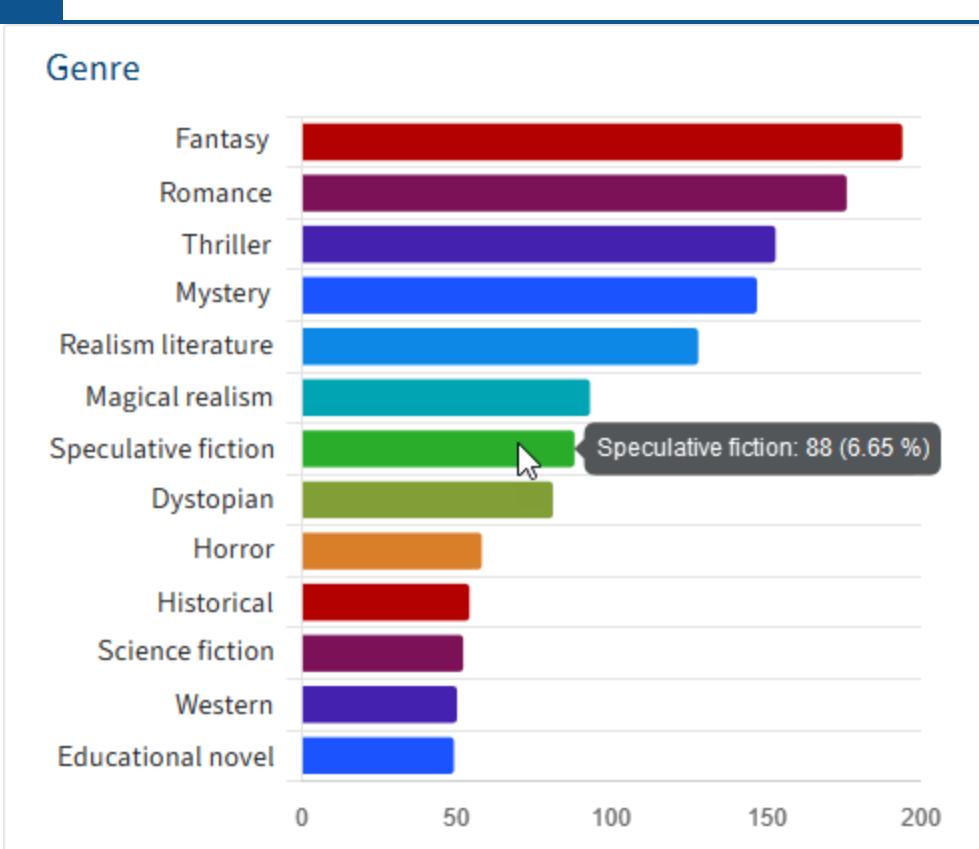


Workspace entries can be visualized in various ways in a dashboard. The types of visualization available depend on the administrative settings.

You have the following options:



You can filter the dashboards.



You can view details about dashboards by clicking on them.

Create workspace

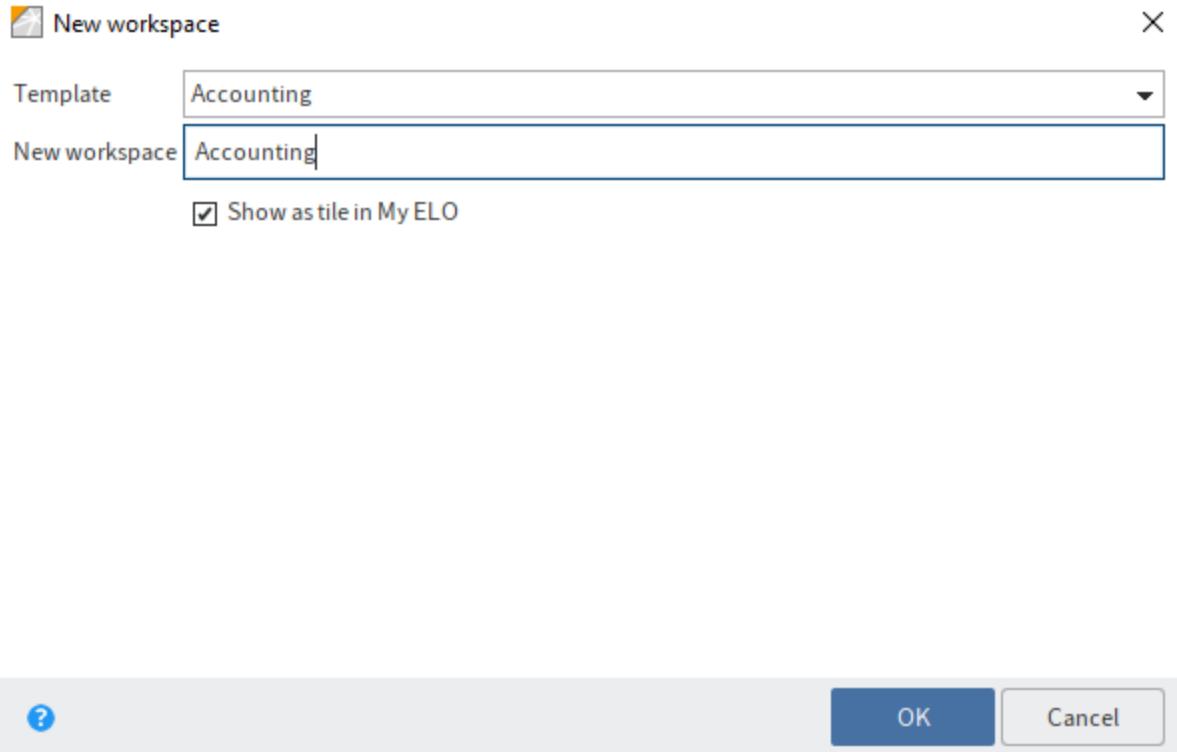
You can create new workspaces.

Requirements

The administrator will already have created workspace types.

Method

1. In *My ELO*, select the *Spaces* tile.
2. Select *ribbon > Spaces tab > New workspace*.



3. In the *New workspace* dialog box, select the type you want to base the workspace on.

4. Enter a meaningful workspace name.

Show as tile in "My ELO": You can create a tile while you are creating the workspace. This only applies to your own client. You can also create the tile later, as described in the chapter [Workspace home screen](#).

5. Select **OK**.

Result

The workspace is created. You will find it as a tile in the tile navigation area.

Outlook

You will learn how to work with workspaces in the following chapters:

- [Workspace home screen](#)
- [Table](#)
- [Kanban board](#)
- [Dashboard](#)
- [Create object](#)

Create object

You can create objects.

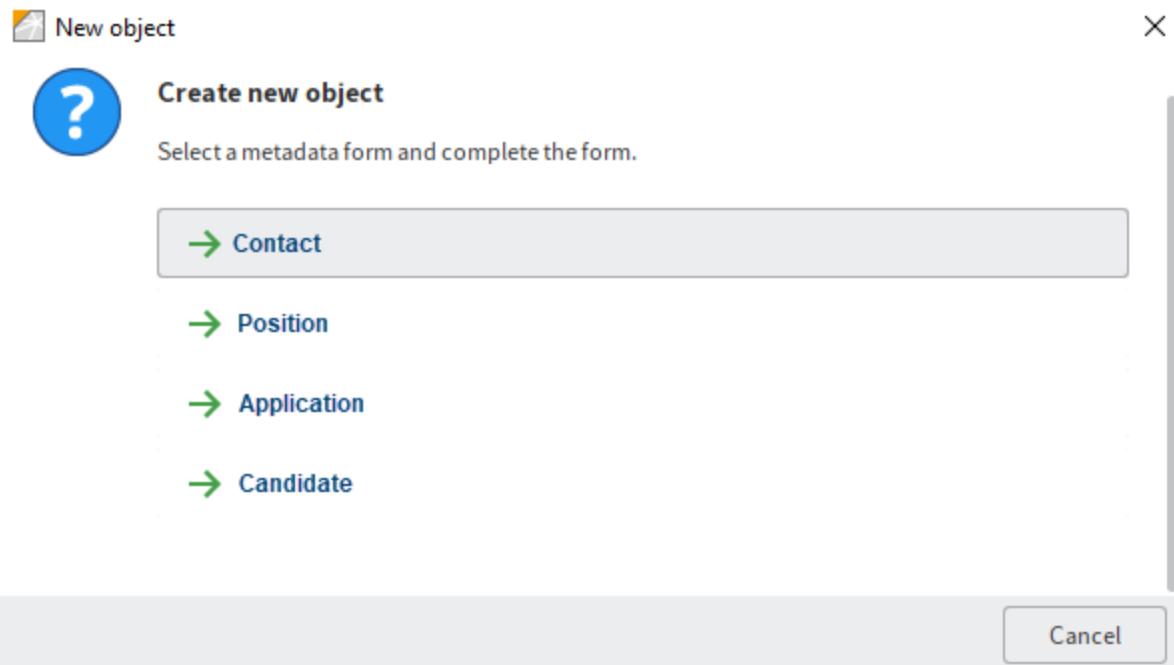
For more information about the concept of objects, refer to the chapter [Objects](#).

Requirements

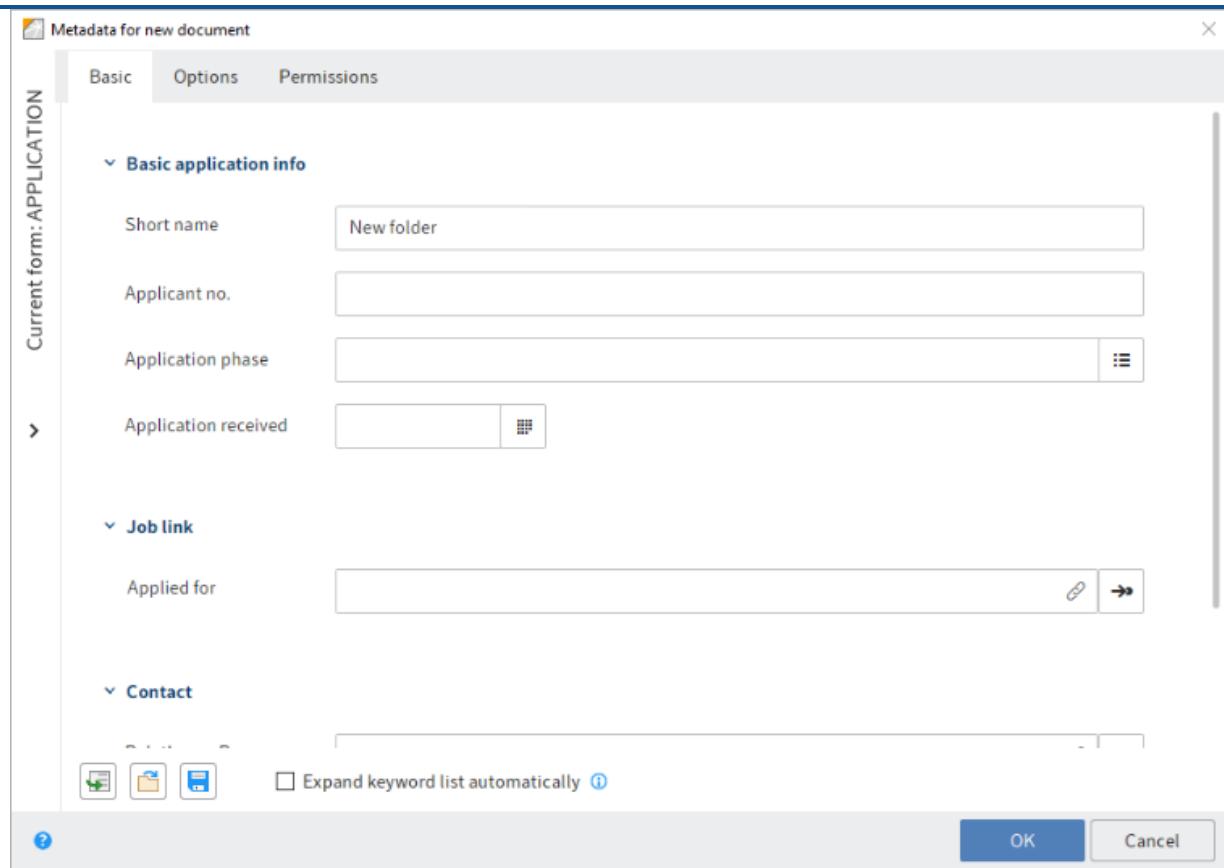
You can only create objects if the function was enabled when the workspace type was created.

Method

1. In *My ELO*, select the *Spaces* tile.
2. Open a workspace.
3. On the ribbon, go to the tab with the workspace functions and select *New object*.



4. In the *New object* dialog box, choose what kind of object you want to create. The administrator has configured which object types are possible for each workspace.



The *New object* dialog box appears with the metadata form appropriate for this object.

5. Complete the fields as required.



If your object is related to another object, you can establish a connection via relation fields. For more information about the concept of relation fields, refer to the chapter [Relations](#).

6. Select *OK*.

Result

The object is created in the workspace. It can be found in the *Newly added* area right away and via filters after a short delay.

Outlook

You will learn how to work with workspaces in the following chapters:

- [Workspace home screen](#)
- [Table](#)
- [Kanban board](#)
- [Dashboard](#)

Teamspaces

The *Teamspace* function enables you to collaborate across teams. All ELO users added to a teamspace can gather and edit documents together and exchange information using the feed.

The permissions you have in a teamspace depend on the [role](#) you have been assigned by the administrator.

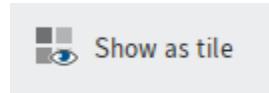
Workspaces can be integrated into a teamspace.

Teamspace home screen

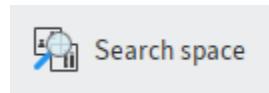
Refer to the Spaces section to learn how to access a teamspace.

You can access all the elements of the teamspace via the home screen of a teamspace. The ribbon features a tab with additional teamspace functions.

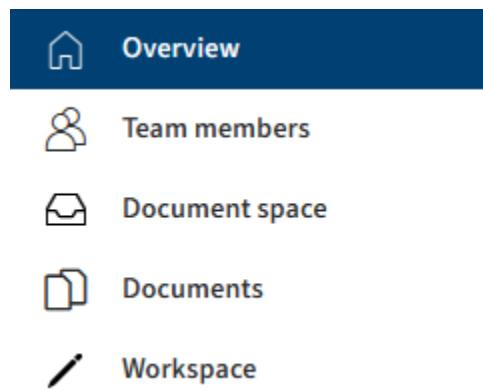
You have the following options:



To quickly access the teamspace, you can create a tile in the tile navigation area of *My ELO*.

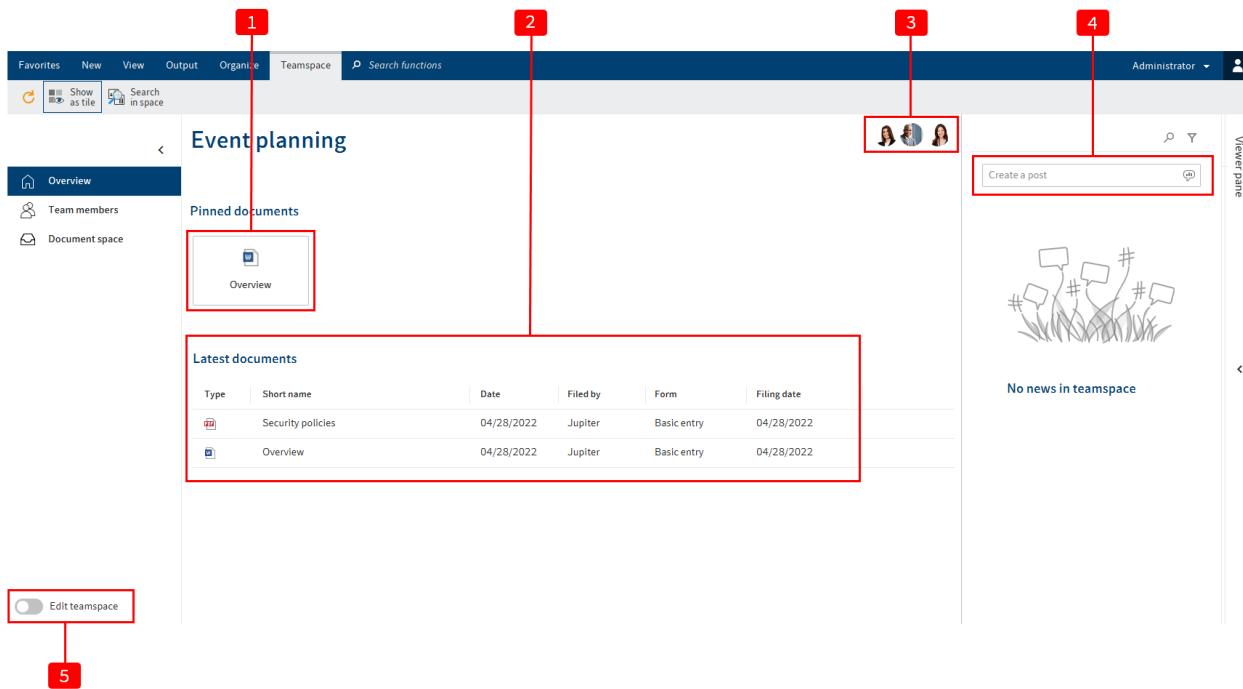


You can search the entries of the selected space. Refer to the chapter on Filters for a more detailed description of the search.



You can navigate between areas in a teamspace. Every teamspace has the areas [Overview](#) and [Team members](#). The names and number of additional areas are customized.

'Overview' area



You have the following options:

1 Pinned documents: You can open a pinned document or unpin a document from this space. The [Document space](#) chapter explains how to pin a document in a teamspace.

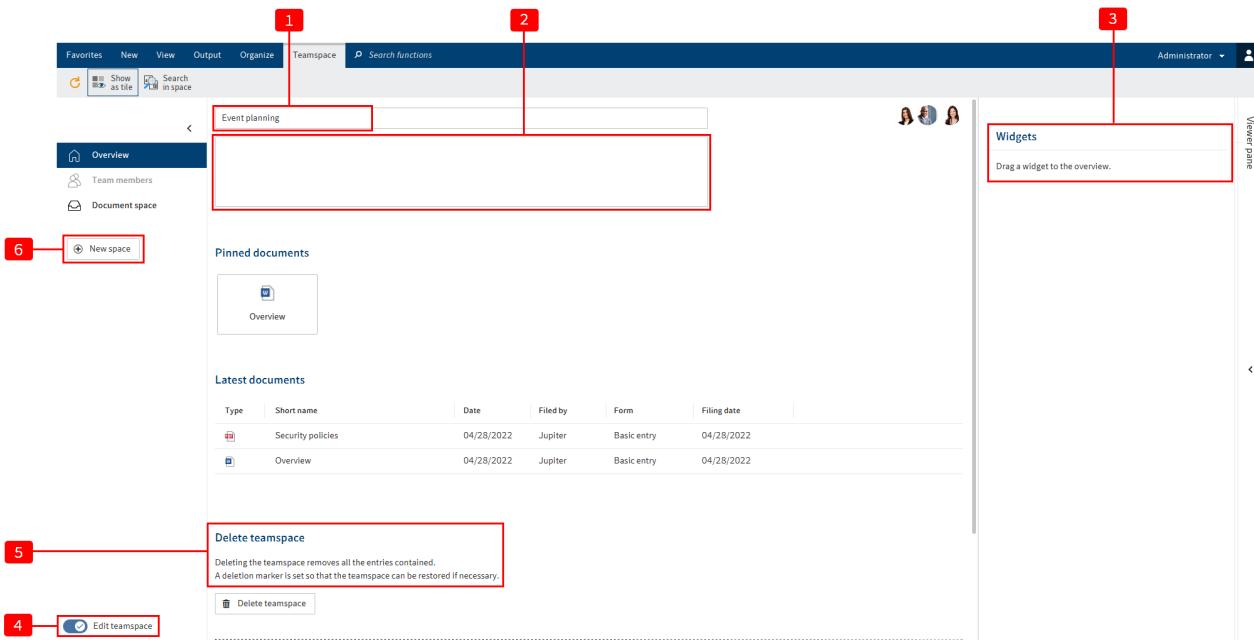
2 Latest documents. You can open one of the latest documents. The [Document space](#) chapter explains how to insert a document in a teamspace.

3 Overview of team members: You can see the members of the teamspace and navigate to the *Team members* area by selecting a member. You can only edit members in the ['Team members' area](#).

4 Feed: You can enter a feed post. In the *Overview* area, the posts for all entries in the teamspace are displayed in the feed. Otherwise, the feed works as described in the chapter *Feed*.

5 Edit teamspace: You can [edit the teamspace](#) if you are authorized to do so based on your role.

Edit teamspace



You have the following options:

- 1 Change the teamspace name
- 2 Change the teamspace description
- 3 Add widgets: You can drag widgets to the field in the bottom area of the overview.
- 4 Close edit mode: All your changes will be saved.
- 5 Delete teamspace: Deleting the teamspace removes all the entries contained. A deletion marker is set so that the teamspace can be restored if necessary.
- 6 Create new space: Your options are [Document spaces](#) and [Workspaces](#).

All options that are not listed here can be found in the chapter '[Overview](#)' area.

'Team members' area

User name	Name	Company	Department	E-mail	Role
Cole					Member
Jupiter					Administrator
Santini					Member

You have the following options:

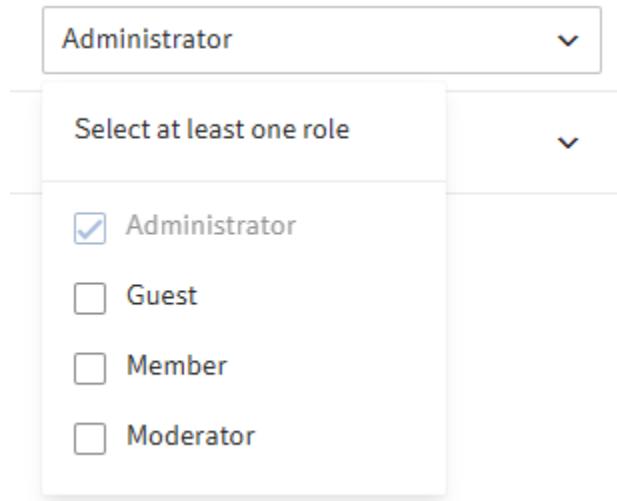
Team members

 Add team member

You can add team members. All team members are initially assigned the role which was set as the default. It can be changed after creation, however.

 Edit roles

You can [edit the roles](#) if you are authorized to do so based on your role.



Administrator

Select at least one role

- Administrator
- Guest
- Member
- Moderator

You can change the [role](#) of team members with the drop-down menu. Team members can have multiple roles.



Cole

Member



You can delete team members. Administrators can only be deleted by administrators. The last administrator cannot be deleted.

 Add team member

 Edit roles



You can search for team members.

Roles

The following four roles are available as standard:

Role Permissions

The user who created the teamspace is automatically the administrator. Additional Administrator members can also be named administrators. Administrators have all the permissions to the teamspace and its contents.

Moderators have all the permissions to the teamspace and its contents. The only difference from an administrator is that they are not allowed to delete the teamspace.

Member Members can create, edit, move, and delete contents in the teamspace.

Guest Guests can only read contents.

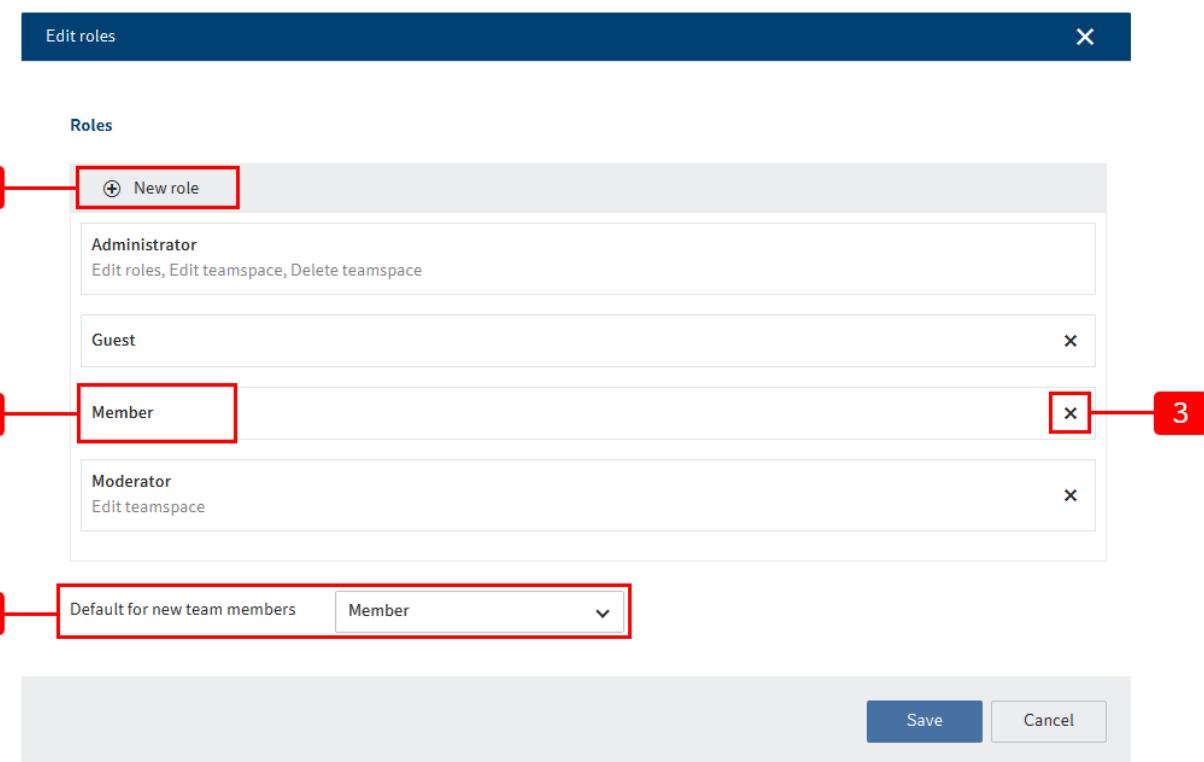
The roles can be edited.

Edit roles

The default roles can be edited or removed, and new roles can be created.

Method

Select *Edit roles*.



In the *Edit roles* dialog box, you have the following options:

1 Add new role: This is where you define the rights for the role members.

2 Edit existing role

3 Delete role

4 Set default for new team members: You can specify in the drop-down menu which role newly created team members are assigned by default. This role can still be changed after creating a member.

Document space

A document space can have any name.

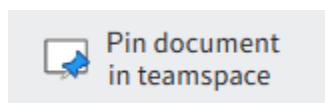
Type	Short name	Date	Filed by	Version	Metadata form
DOC	Overview	04/28/2022	Jupiter	1	Basic entry
DOC	Security policies	04/28/2022	Jupiter	1	Basic entry

You have the following options:

Type	Short name	Date	Filed by	Version	Metadata form
DOC	Overview	04/28/2022	Jupiter	1	Basic entry
DOC	Security policies	04/28/2022	Jupiter	1	Basic entry

This area works like the viewer pane in the repository. You can create new documents as well as view and edit existing documents.

You can edit the entries using the functions on the ribbon and in the context menu as usual.



You can pin documents in the ['Overview' area](#) of the teamspace. You will find the *Pin document in teamspace* function on the *Document* tab.

The screenshot shows the ELO Java Client interface. At the top, there's a search bar and some navigation icons. Below that is a button labeled "Create a post". Underneath, a feed post is displayed: "ELO Service created a new folder." followed by the date "Apr 28, 2022, 10:09 AM" and a "Comment" link.

You can enter a feed post. The post does not apply to any specific entry, and is instead shown in the document space. Otherwise, the feed works as described in the chapter Feed.

Edit teamspace

You can [edit the document space](#).

Edit document space

The screenshot shows the "Manage spaces" interface. On the left is a sidebar with "Event planning" and links for "Overview", "Team members", "Document space" (which is selected and highlighted in blue), and "Document". A red box labeled "1" points to the "+ New space" button. In the main area, a table lists a single space named "Document space". To the right of the table is a "Delete space" button with a red box labeled "2" pointing to it. Below the table is a section titled "Symbol" containing various icons. A red box labeled "3" points to the table row for "Document space". A red box labeled "4" points to the icon section. At the bottom left, a red box labeled "5" points to the "Edit teamspace" toggle switch.

You have the following options:

- 1 Create new space: Your options are [Document spaces](#) and [Workspaces](#).
- 2 Delete space
- 3 Change the name of the document space
- 4 Change the icon of the document space
- 5 Close edit mode: All your changes will be saved.

Workspace

A workspace can have any name. A teamspace can also contain multiple workspaces or none at all.

You will find general information in the chapter Workspaces.

You can edit a workspace within a team like a [document space](#).

The members and roles of a teamspace are inherited by the workspace.

Create teamspace

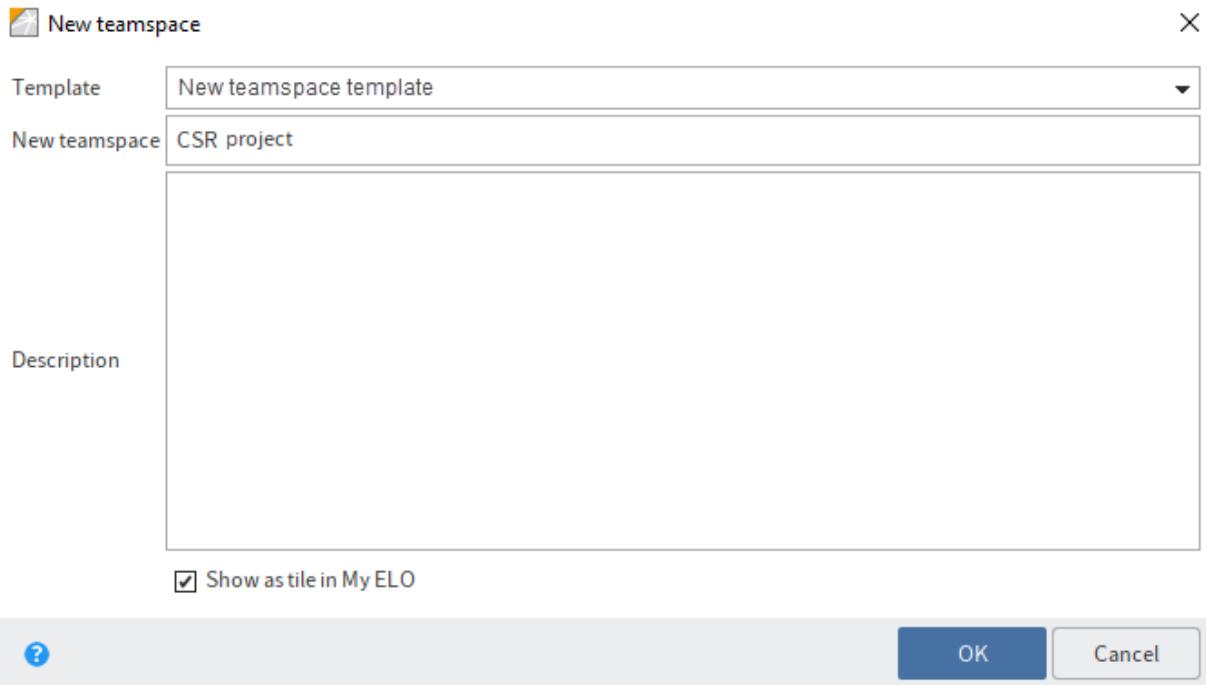
You can create new teamspaces.

Requirements

The administrator will already have created teamspace templates.

Method

1. In *My ELO*, select the *Spaces* tile.
2. Select *ribbon > Spaces tab > New teamspace*.



3. In the *New teamspace* dialog box, select the template you want to base the teamspace on.
4. Enter a meaningful teamspace name and, optionally, a description.

Show as tile in "My ELO": You can create a tile while you are creating the teamspace. This only applies to your own client. You can also create the tile later, as described in the chapter [Teamsphere home screen](#).

5. Select *OK*.

Result

You have created a teamspace. You are automatically entered as the administrator for teamspaces you have created.

Outlook

You can now edit the teamspace and add other members.

You will learn how to proceed in the next chapters:

- [Edit teamspace](#)
- ['Team members' area](#)
- [Edit document space](#)
- [Workspace](#)

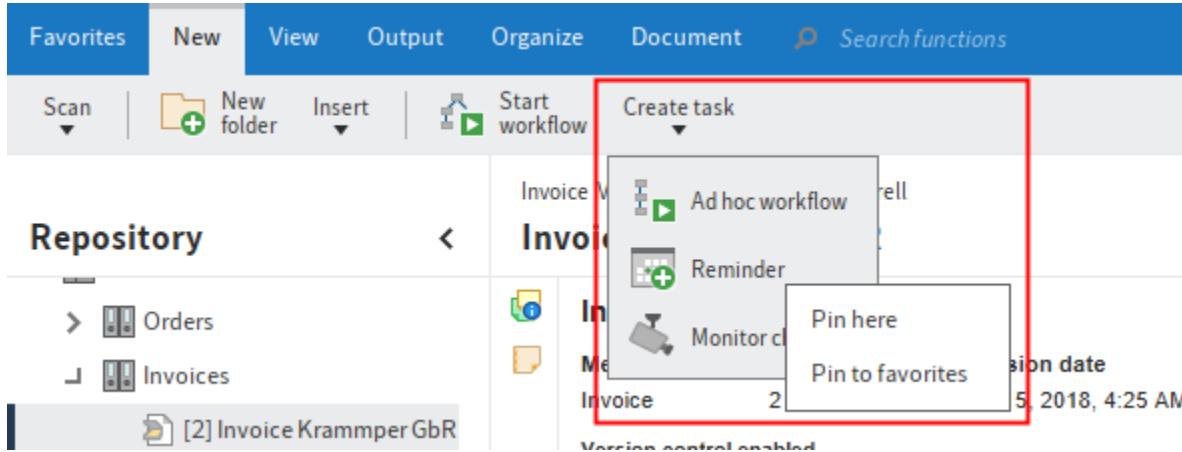
'Favorites' tab

With the default settings, the *Favorites* tab contains several important functions that you can access quickly. You have the following options for adding functions to the *Favorites* tab:

- In the context menu on the ribbon
- In the configuration

In the context menu on the ribbon

You can add functions to the *Favorites* tab using the context menu.



Right-click the desired function. The context menu opens. In the context menu, click *Pin to favorites*. The function now appears on the *Favorites* tab.

To remove a function from the *Favorites* tab, click *Unpin from favorites* in the context menu. The function is no longer displayed on the *Favorites* tab. You will now find the function in the corresponding group tab.

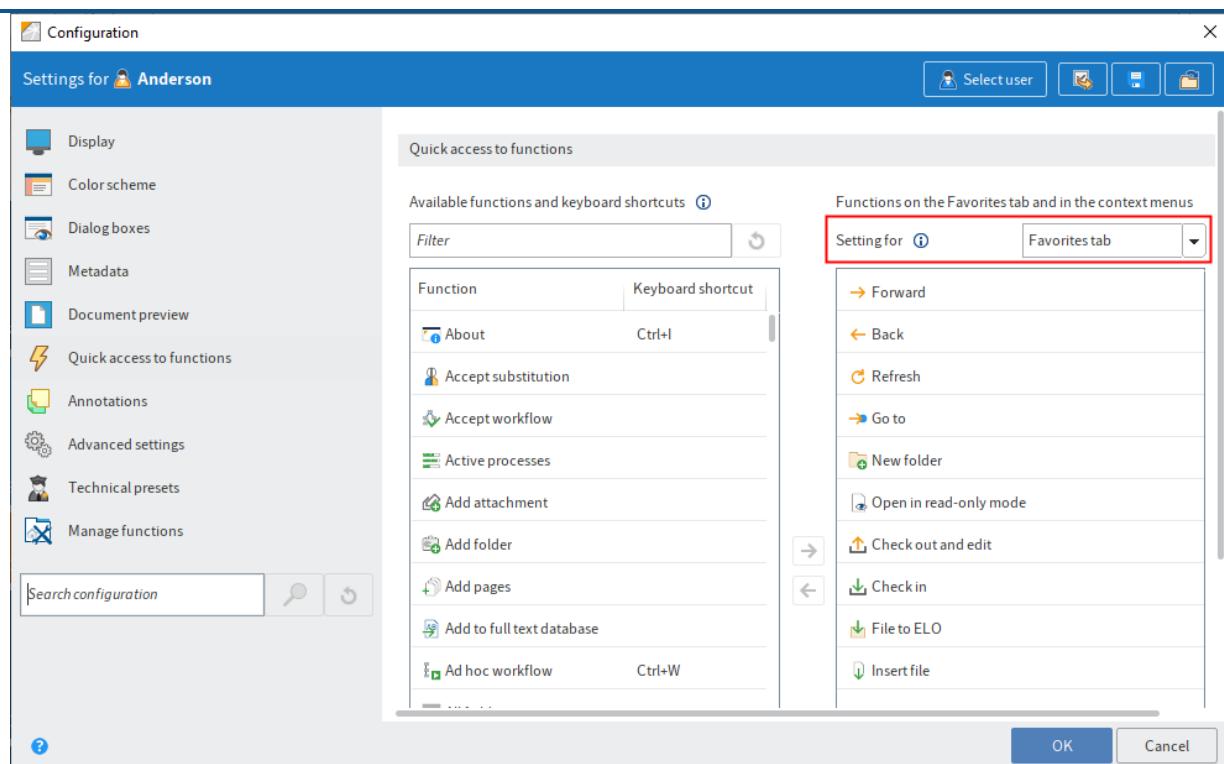
In the configuration

In the *Quick access to functions* area in the configuration, you can add functions to or remove functions from the *Favorites* tab, and change their location.

Information

In the *Quick access to functions* area, you can also add functions to the context menus of the work areas. Select the corresponding context menu from the *Setting for* drop-down menu on the right-hand side.

1. On the ribbon, click *User menu [your name] > Configuration > Quick access to functions*.



The *Quick access to functions* area opens. The settings for the *Favorites* tab are displayed.

The column on the left-hand side contains an overview of all available functions in ELO. In the column on the right-hand side, you see the functions that are currently available on the *Favorites* tab.

2. To add a function to the *Favorites* tab, select the function in the left-hand column and click the arrow pointing right between the two columns.

To remove a function from the *Favorites* tab, select the function in the right column and click the arrow pointing left between the two columns.

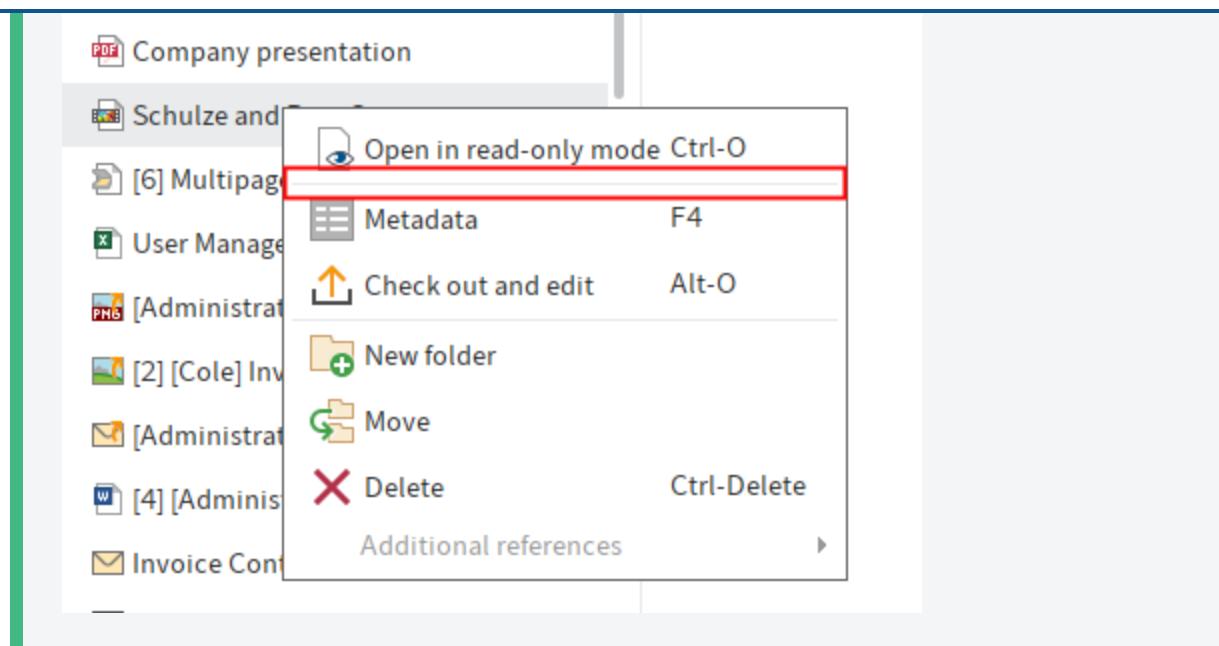
Information

You can change the order of functions on the *Favorites* tab with the arrow buttons to the right of the *Settings for* column.

3. Click *OK* to confirm the changes.

Information

For better visual clarity, you can insert a separator line between the functions in the menus. Select the function *Separator line* from the list on the left.



'New' tab

Scan to repository

Available in: *Repository work area > Ribbon > New > Scan*

This function enables you to scan documents straight to the *Repository* work area. After scanning, you must enter metadata for the document. The scanned document is filed to the last selected folder in ELO.

Please note

You need to have a compatible scanner installed and selected.

Attach to back

Available in: *Repository work area > Ribbon > New > Scan*

This function attaches pages to the end of a TIFF document that was already filed to ELO. You need to scan the pages.

Please note

You need to have a compatible scanner installed and selected. To check whether a scanner is installed, click the *Select scanner* button under *Ribbon > New > Scan*.

Attach to front

Available in: *Repository work area > Ribbon > New > Scan*

This function attaches pages to the front of a TIFF document that was already filed to ELO. You need to scan the pages.

Please note

You need to have a compatible scanner installed and selected. To check whether a scanner is installed, click the *Select scanner* button under *Ribbon > New > Scan*.

Select scan profile (drop-down menu)

Available in: *Ribbon > New > Scan*

Use the drop-down menu to select a scan profile for the next scan. Create new scan profiles with the *Scan profiles* function.

Scan profiles

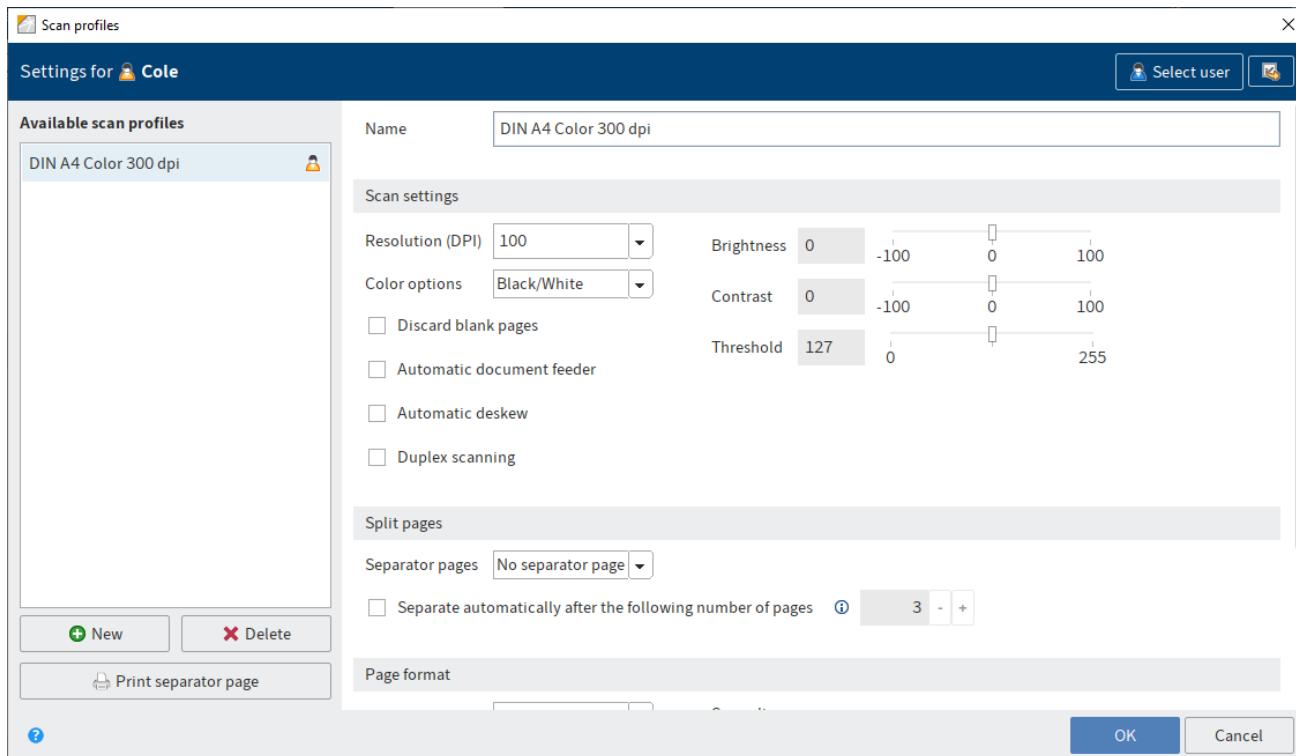
Available in: *Ribbon > New > Scan*

Use this function to open the *Scan profiles* dialog box. Define profiles for scanning documents in the *Scan profiles* dialog box. A scan profile enables you to define settings, such as which resolution to use or which format to store the scanned documents in. This way, you can set up a custom scan profile for each source document.

Scan profiles are used to take the specific properties of documents into account, such as texts, color images, high-resolution images, different formats, etc.

Information

You will also find the *Print separator pages* function in the *Scan profiles* dialog box. You can find more information about this function in the Join (separator pages) section.



You can make the following settings:

Available scan profiles

Under *Available scan profiles*, you can see all scan profiles available to the selected user or group.

New: Click the *New* button to create a new scan profile.

Delete: Click *Delete* to remove the selected scan profile.

Print separator page: Opens the *Print separator page* dialog box. In the *Print separator page* dialog box, select whether a separator page will be printed with horizontal or vertical bars.

You need a separator page when you scan multiple documents one after the other. A separator page shows the transition to a new document and ensures that the documents are filed individually to the *Intray* work area after scanning.

Name of the profile

Name: Use the *Name* field to enter the name of the selected scan profile.

Scan settings

The following settings apply to the scan process. The settings can only be edited if you have created a new profile or selected an existing profile.

Information

The settings are not supported by all scanners.

Resolution in dpi: In the *Resolution in dpi* drop-down menu, you can select the resolution (dpi = dots per inch) for the scan process.

Color options: In the *Color options* drop-down menu, select whether you want to create a color, black/white, or grayscale scan.

Discard blank pages: If the *Discard blank pages* option is enabled, blank pages will not be scanned.

Automatic document feeder: The *Automatic document feeder* option is intended for scanner who have an automatic paper feeder.

Automatic deskew: If the *Automatic deskew* option is enabled, pages scanned diagonally are straightened, if possible.

Duplex scanning: The *Duplex scan* option is intended for scanners that can scan front and back pages.

Brightness: Use the *Brightness* slider to define the brightness of the scan.

Contrast: Use the *Contrast* slider to define the contrast of the scan.

Threshold: Use the *Threshold* slider to define the threshold for the scan process. The threshold is the value that determines whether a pixel is white or black.

Split pages

The following settings apply to how to handle separator pages.

Separator pages: In the *Separator pages* drop-down menu, you can specify whether you want to use separator pages. If multiple documents are scanned in sequence, ELO recognizes individual documents based on the separator pages.

Automatically split pages after the following page number: If you select this option, ELO splits the documents when scanning based on the defined number of pages.

You can also use separator pages (see above). If a separator page is detected, ELO splits the document after the separator page. The page count begins again after the separator page.

Page format

The following settings apply to the documents being scanned.

Page size: Use the *Page size* drop-down menu to set which paper format is used.

Dimensions in: Use the *Dimensions in* drop-down menu to set the unit of measurement for a user-defined page format.

Scan clip: If you have selected the option *User-defined* in the *Page size* drop-down menu, use the fields under *Scan clip* to specify the area that will be included in the scan.

Save document

The following settings apply to the save process.

Image format: Use the *Image format* drop-down menu to select the file format you want to save scanned documents in. The following formats are available:

- TIFF: Black/white and color scans
- JPEG: Only color scans

Compression: In the *Compression* dialog box, you can specify whether you want to compress the scanned documents.

Quality: If you have selected the *JPEG* option in the *Compression* drop-down menu, you have the option to select the image quality. Use the *Quality* slide control for this.

Select scanner

Available in: *Ribbon > New > Scan*

Use this function to choose the scanner that you want to use. This function only applies when you use multiple scanners.

New folder

Use this function to create a new folder in ELO. You can find more information in the Create folder chapter.

Insert file

This function enables you to transfer a file from your local file system to ELO. The file is filed to the currently selected folder. If you are in the *Intray* work area, the file is transferred to the *Intray* work area.

For more information, refer to the chapter Insert document.

Document from template

Keyboard shortcut: CTRL + N

Use this function to create a new document based on a document template. Use the *Document from template* dialog to select a document to use as a template. The template is opened for editing in the corresponding application. After editing, the document must be saved and checked back into ELO.

For more information, refer to the chapter Insert document.

Start workflow

This function starts a new workflow. The workflows available to you when you run the *Start workflow* function were defined by your company. Use the *Start workflow* dialog box to change a template for the new workflow. To allow changes to the template when starting the workflow, enable the option *Start workflow in edit mode* (*Ribbon > User menu [your name] > Configuration > Advanced settings > Workflow*).

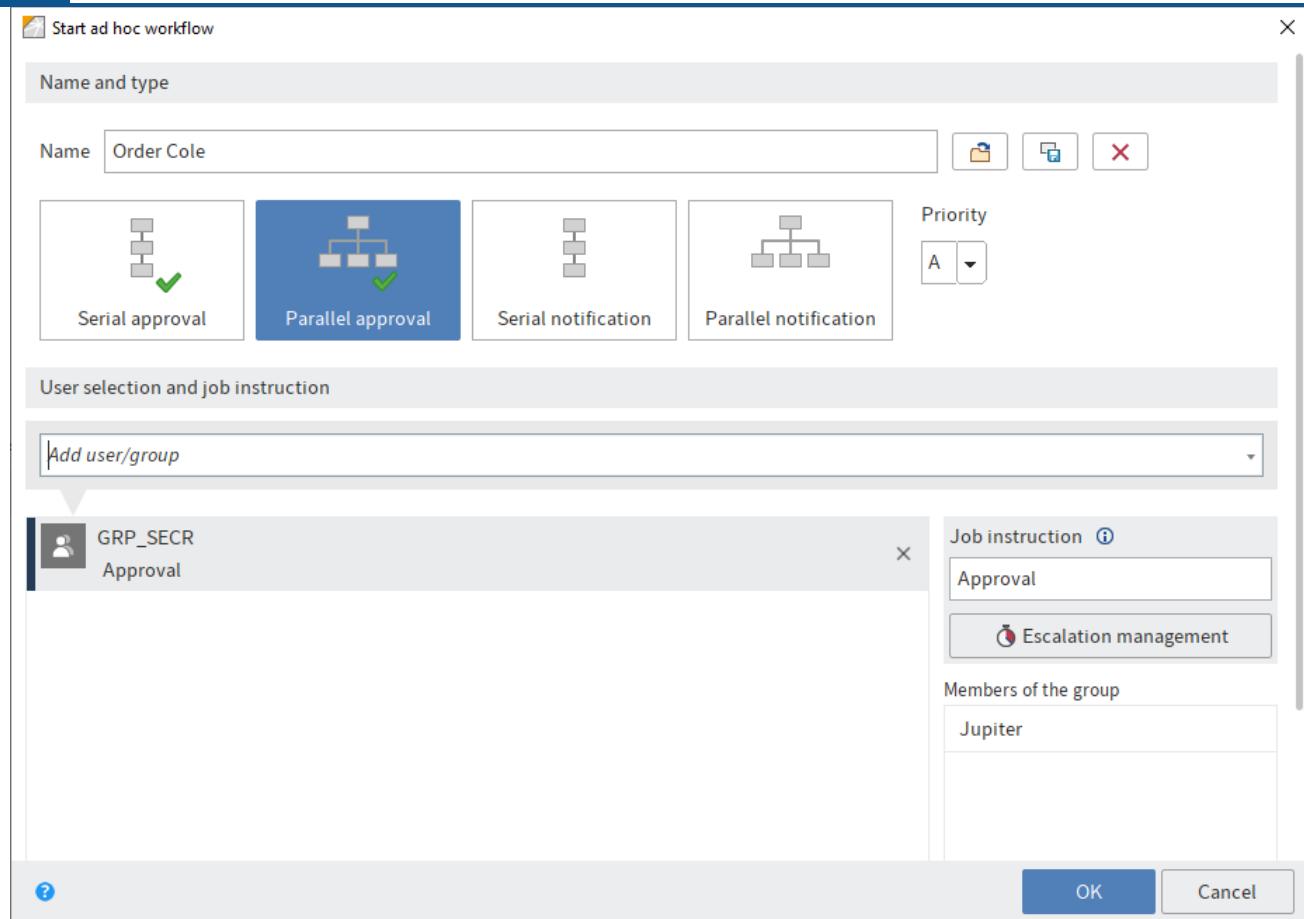
You can find more information in the Start workflow chapter.

Ad hoc workflow

Keyboard shortcut: CTRL + W

This function starts a new ad hoc workflow. Ad hoc workflows are simple, predefined workflows available in ELO. You can use an ad hoc workflow to route an item to users for approval or to notify users.

You can make the following settings in the *Start ad hoc workflow* dialog box:



Name and type

Name: Insert the name of the new ad hoc workflow here.

Load ad hoc workflow from template (folder icon): Use the *Load ad hoc workflow from template* function to load ad hoc workflows saved as a template.

Save as template (diskette icon): The *Save as template* function allows you to save the current ad hoc workflow as a template. You can assign a name to the template.

ELO creates a folder for each saved template in the user's folder under *Administration // Users // <Folder with corresponding number range> // <user name> // data // AdHoc Templates*. The template data is saved to the extra text of the respective folder.

Information

With the default settings, templates are only available to the user who creates them. However, a user with the corresponding permissions can forward these templates to other users as a reference/copy. The references/copies must be saved to the *AdHoc Templates* folder of the respective user.

Delete an existing template (X icon): You can delete ad hoc workflow templates with the *Delete an existing template* function. A dialog box appears in which you can select the template you want to delete.

Please note

If you delete the original template, any references that you have created will also be deleted.

Priority: Set an importance level for the workflow: A (= high), B (= medium), or C (= low). You can sort and filter the task list according to priorities.

Type: Select the type of ad hoc workflow you want to create. You can choose from the following types:

- Serial approval: The workflow is forwarded to the participants one after the other. The participants must decide whether or not to approve the workflow step. Depending on the result, the corresponding notification is sent to the selected recipient.
- Parallel approval: The workflow is distributed in parallel. All recipients receive the workflow at the same time. Each participant must grant approval.
- Serial notification: The workflow is forwarded to the individual participants one after the other. The participants must confirm receipt of the workflow one after another. The workflow is not forwarded to the next participants until the user has confirmed the workflow.
- Parallel notification: The workflow will be sent to all participants at once. The participants must confirm receipt of the workflow. After completion, the corresponding notification is sent to the selected recipient.

User selection and job instruction

Add user/group: Search for the desired user or group in the *Add user/group* field. Suggestions will appear as you type.

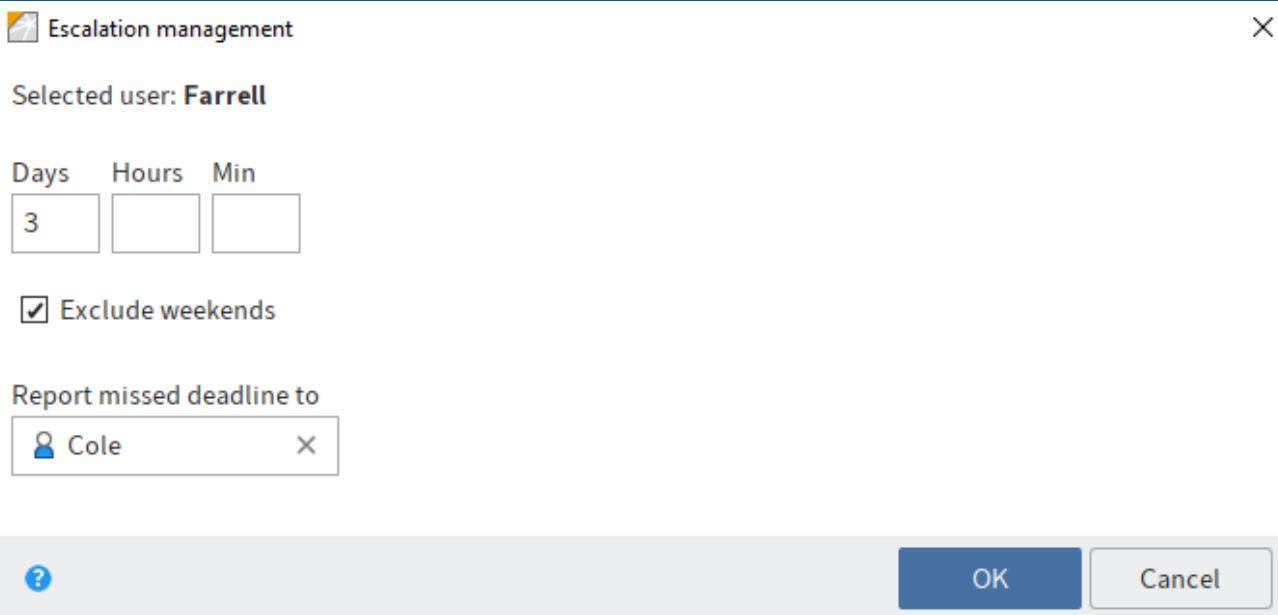
Click the corresponding suggestion to select a user or a group.

Alternative: If you click the triangle to the right of the *Add user/group* field, this will open a drop-down menu. The drop-down menu contains a list of the users and groups you selected recently.

Information

In the case of serial ad hoc workflows, the workflow is delivered according to the order in the list. To change this order, use the *Move up* (small arrow icon pointing up) or *Move down* (small arrow icon pointing down) buttons.

Job instruction: In the *Job instruction* field, enter the individual job instruction for the user selected in the list. The user sees the job instruction in the *Workflow step* column of the *Tasks* work area as soon as they have accepted the workflow.



Escalation management: Click the *Escalation management* button to open this dialog box. This dialog box is where you specify how long the workflow may remain with the respective user. There is also the option to include or exclude Saturdays and Sundays when calculating the maximum workflow duration. You can also select a user who is notified if the deadline is missed.

Members of the group: If you select a group, you will see the group members in the *Members of the group* area.

Expand: If you click the *Expand* button, the group will not be displayed as a group. Instead, the individual members of the group are listed.

Information

If the group is selected, one member of the group can accept and process the workflow. If you expand the group, every member of the group can accept and process the workflow.

Completion options

Recipient: In the *Recipient* field, you can see which user will be notified when the ad hoc workflow is completed. To change the recipient, click *Select user*.

Success message: Enter a text for the completion message in the *Success message* field.

Cancellation message: Enter a text for this message in the *Cancellation message* field. This only applies to *Approval* type ad hoc workflows.

Withdraw the workflow from all users as soon as one user does not approve it: This option only applies for *Parallel approval* workflows. Enabling this option means that users no longer need to edit approval processes that have been canceled.

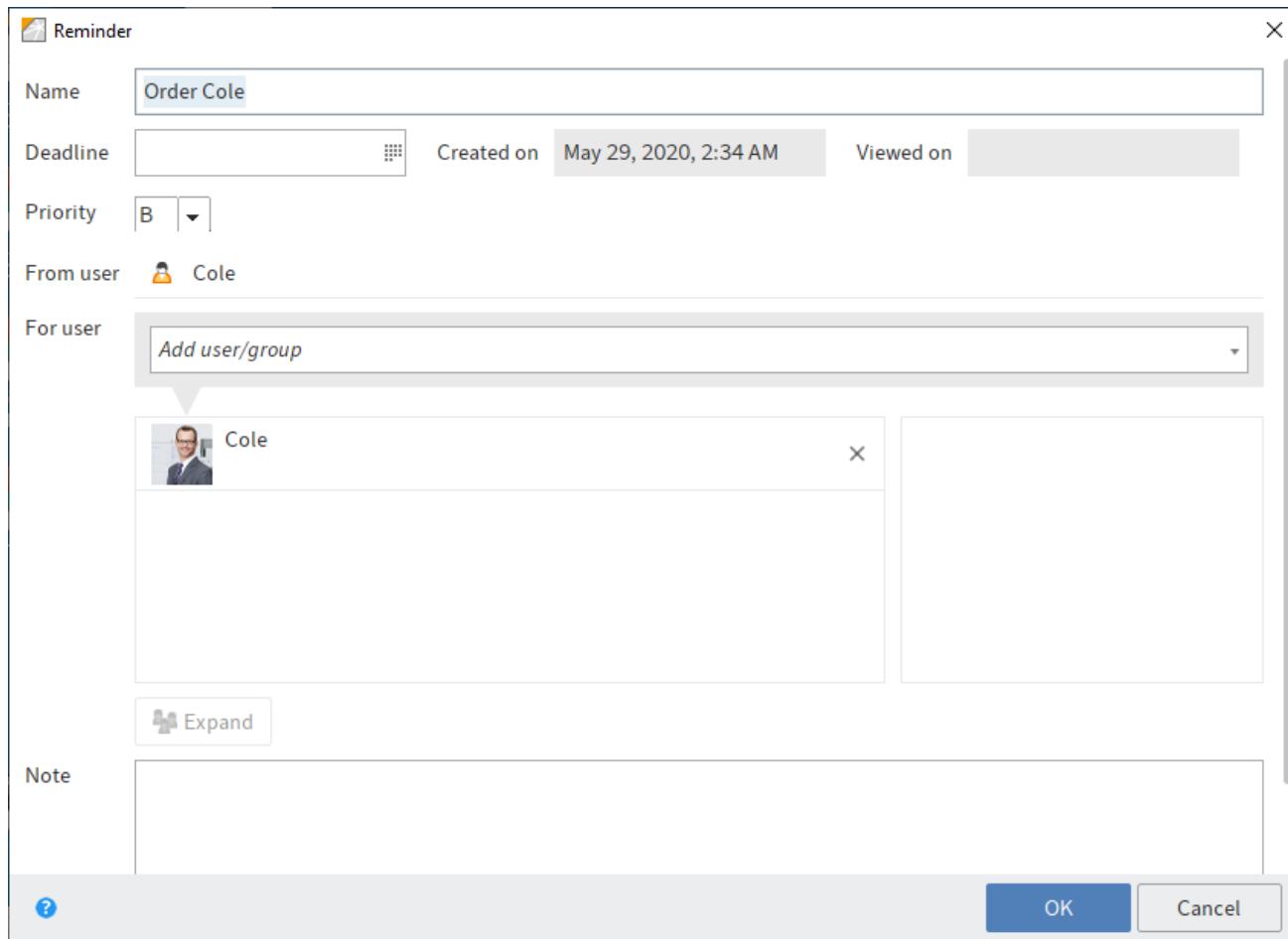
End script: Click the *End script* to choose a script that is executed after completing the ad hoc workflow.

OK: Click *OK* to start the ad hoc workflow.

Reminder

Available in: *Ribbon > New > Create task*

Use this function to create a reminder for a document or a folder. A reminder defines a date on which the document or the folder appears in the *Tasks* work area of the user responsible.



Use this dialog box to create a new reminder. You can edit existing reminders as well.

The following options are available:

- Name: Enter a name for the reminder.
- Deadline: Enter the date on which the document should be resubmitted as a task.
- Created on: The *Created on* field shows the date that the reminder was created on.
- Viewed on: The *Viewed on* field shows the date that the reminder was viewed on.
-

Priority: Choose between the priority levels A, B, or C. You can sort and filter the task list according to priorities.

- From user: The user who created the reminder is displayed in the *From user* field.
- For user: Search for the desired user or group in the *Add user/group* field. Suggestions will appear as you type.

Click the corresponding suggestion to select a user or a group.

Alternative: If you click the triangle to the right of the *Add user/group* field, this will open a drop-down menu. The drop-down menu contains a list of the users and groups you selected recently.

Members of the group: If you select a group, you will see the group members in the *Members of the group* column.

Double-click the corresponding user in the *Members of the group* column to select a member of a group.

Cancel selection: To cancel the selection, click the X icon next to the selected user or group.

Expand: If you click the *Expand* button, the group will not be displayed as a group. Instead, the individual members of the group are listed.

- Note: Enter a message or instructions for the recipient of the reminder.

Additional information:

- You can open an overview of your reminders under *Ribbon > Organize > Overviews*.
- You can change a reminder in the *Tasks work area > Ribbon > Task > Edit*.
- There are two ways to delete a reminder:
 - With the function *Delete reminder* (available in: *Ribbon > Organize > Overviews > Reminders overview*)
 - Select the reminder in the *Tasks work area* and click the function *Delete* (available in: *Ribbon > Organize*).
- To display all reminders associated with an entry, select the entry and click on *Ribbon > Organize > Overviews > Reminders for entry*.

Monitor changes

Available in: *Ribbon > New > Create task*

This function enables you to keep track of changes to a document or folder. If another user creates a new version of the document being monitored or if another user adds an entry to the folder being monitored, you will be notified in the *Tasks work area*.

Information

If you are monitoring a folder, you will be notified as soon as another user has created a new document or new child folder within this folder. When you monitor folders, you are not notified of changes to their child folders. To monitor changes to a child folder, you have to monitor the child folder specifically.

You can make the following settings:

- Name: Enter a name for the entry being monitored. The name of the selected entry is entered by default.
- Priority: Set the importance of the monitoring instance: A (= high), B (= medium), and C (= low). You can sort and filter the task list according to priorities.
- Note: Enter a note that appears in your Tasks work area.

Additional information:

You can open an overview of entries you are monitoring under *Ribbon > Organize > Overviews*. You can edit or end monitoring actions here.

'View' tab

Back

Use this function to go one step back in the viewing history of the document that you opened last.

Go to

This function opens the filing location of the currently selected document or folder. Use this function to open the filing location of an entry in the list of search results, for example.

Refresh

The function updates the view of the current work area. The data is reloaded from the server.

Forward

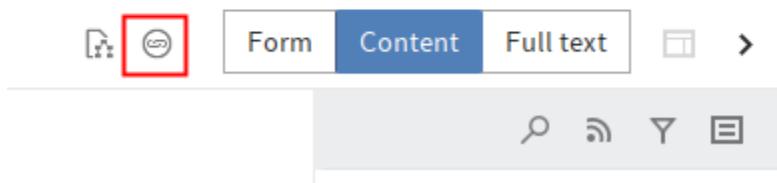
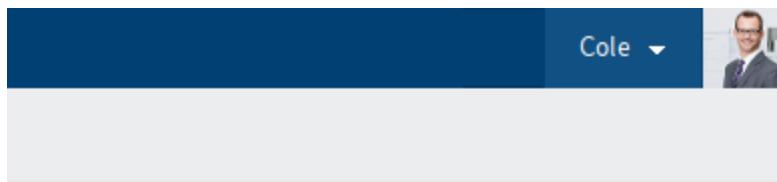
Available in: *Ribbon > View > Navigation*

Use this function to go one step forward in the viewing history of the document. You must have used the *Back* function at least once to be able to do this.

Link

Available in: *Ribbon > View > Navigation*

You can link entries (folders or documents) that are related. This enables you to access an entry from another entry using the link. If two entries are linked, the *Link* icon is displayed.



Information

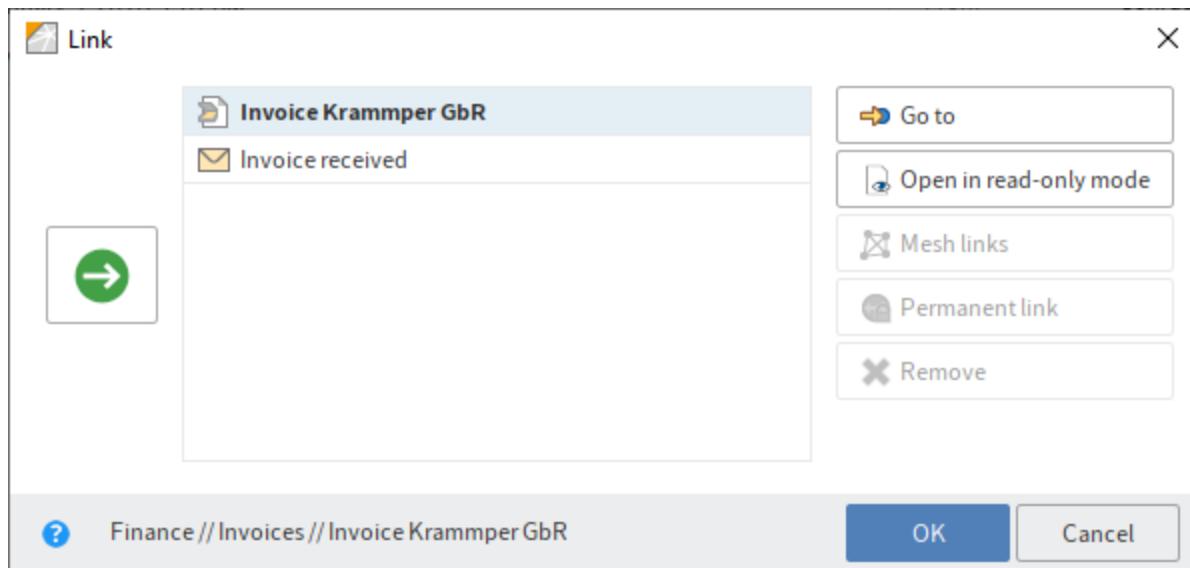
In the *Tree and table* layout mode, you can show the *Link* column in the table. A link icon is also displayed in this column if a link exists for an entry.

Method

1.

Select a document in the *Repository* work area.

2. On the ribbon, click *View > Navigation > Link*.



The *Link* dialog box opens.

3. Select a second document in the *Repository* work area. In the *Link* dialog box, click the *Add the selected entries as links* button (arrow facing right).

The second document is added as a link.

The following functions are available in the *Link* dialog box:

Go to: The *Go to* button takes you straight to the respective entry in the *Repository* work area.

Open in read-only mode: Click *Open in read-only mode* to open the respective document in an external application.

Mesh links: If an entry is linked with multiple other entries, you can link all of the entries with this function.

Permanent link: The link to the selected entry is permanent. Permanent links cannot be deleted.

Remove: Deletes a selected entry from the list of links. The links to the entries are removed.

OK: Click *OK* to link the entries and close the dialog box.

To edit an existing link, click the *Link* icon.

Templates

Available in: *Ribbon > View > Navigation*

Use this function to jump to the folder with the document templates in ELO. Specify the filing location of the folder with the document templates on the *Ribbon > User menu [your name] > Configuration > Technical presets > Folder for document templates*.

For more information, refer to this chapter: Insert document.

Go to top level

Available in: *Ribbon > View > Navigation*

This function takes you to the top level of the *Repository* work area.

Copy to clipboard

Available in: *Ribbon > View > Navigation*

Use this function to transfer a document or a folder to the *Clipboard* work area. The *Clipboard* work area is used as a kind of favorites list in which you can collect frequently used documents. A reference to the selected entry is created on the Clipboard. The filing location in ELO does not change.

You will find more information here: 'Clipboard' work area.

Remove from Clipboard

Available in: *Clipboard work area > Ribbon > View > Navigation*

Use this function to remove the entry from the *Clipboard* work area. The entry remains unchanged in the *Repository* work area.

You will find more information here: 'Clipboard' work area.

New view

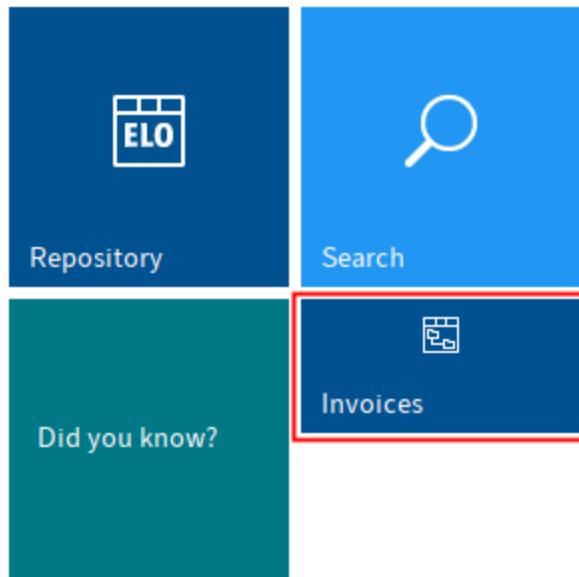
Available in: the *Repository*, *Tasks*, *Search*, and *Clipboard* work areas via *Ribbon > View*.

Keyboard shortcut: ALT + N

Use the *New view* function to create a new view in the *Repository*, *Search*, and *Clipboard* work areas, or a new task view in the *Tasks* work area. The folder views and task views are added as tiles to the tile navigation.

You will find more information here: Create tile.

Repository



Folder view: A folder view is restricted to a part of the repository.

Tasks



Task view: A task view filters the task list according to specific criteria. The criteria are stored in the respective task view.

Edit view

Available in: *Ribbon > View > Views*

Use the *Edit view* function to edit the settings of a folder, task, or search view.

You will find more information here:

- Create tile
- Create search view

Manage views

Available in: *Ribbon > View > Views*

Use the *Manage views* function to open the *Manage views* dialog box for editing folder and task views. Existing views are listed in the left-hand column of the dialog box. Edit the selected view in the right column of the dialog box..

You will find more information here: Create tile.

Delete view

Available in: *Ribbon > View > Views*

Use the *Delete view* function to delete the selected folder view or task view.

Open a new window

Available in: *Ribbon > View > Window*

Use this function to open a second ELO Java Client window.

Show side by side

Available in: *Ribbon > View > Window*

Click the *Show side by side* function to view two ELO windows beside one another.

Information

If you don't already have a second window open, this function automatically opens one.

Show stacked

Available in: *Ribbon > View > Window*

Click the *Show stacked* function to view two ELO windows beside one another.

Show preview document

Available in: *Ribbon > View > Display*

The preview document is a special image document that is stored separately in ELO. Use this function to display documents if there is no viewer for the original format. You can use this for CAD files, for example.

You will find more information here: Create preview document.

Switch PDF preview

Available in: *Ribbon > View > Display*

Use this function to switch to a different PDF preview mode. There are different modes for viewing PDFs. One mode includes the ELO viewer toolbar, which allows you to place annotations on the

document. The other mode includes typical PDF functions and may be more suitable for viewing specific documents.

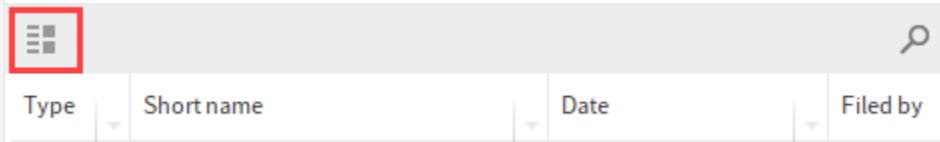
Expand branch

Available in: *Ribbon > View > Arrange*

Use this function to open the child entries of a selected folder. All existing child entries are displayed.

Information

You will find the display options *Table*, *List*, *Tiles*, and *Tree* on the new gray toolbar in ELO 21.



'Output' tab

Send document

Keyboard shortcut: CTRL + M

This function enables you to send a document as an e-mail attachment. A new e-mail opens in your e-mail program with the document attached. Enter any necessary additional information and send the document.

Send as ELO link

This function enables you to send a selected entry as an ELO link. A new e-mail opens in your e-mail program with the ELO link attached. The recipient can open the entry from the ELO link. The recipient must have access to ELO.

Send as PDF

Available in: *Ribbon > Output > Send*

This function converts a document to PDF format. A new e-mail opens in your e-mail program with the PDF attached.

You can send the PDF with or without annotations (e. g. sticky notes). Select the desired option in the *Send as PDF* dialog box.

You can specify your preferred setting in the configuration under Dialog boxes > Annotations when sending as PDF. You can select the options *Confirm via dialog box*, *Do not embed annotations*, or *Always embed annotations*.

Save as

Keyboard shortcut: CTRL + S

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

Save as ELO link

Available in: *Ribbon > Output > Save*

Use this function to store the selected file as an ELO link in your local file system. The ELO link opens the filing location of the file in ELO. This enables you to give another user access to a document provided that the user has access to ELO.

Link with drag-and-drop

Available in: *Ribbon > Output > Save*

If this function is enabled, you create a link file when you drag an entry from ELO. When you drop the entry onto the target, you create a link to the entry in ELO. This function allows you to create links on the desktop or in an e-mail, for example.

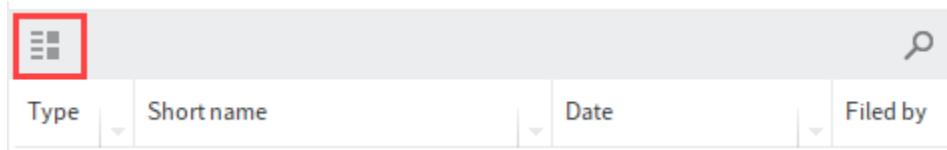
1. Click the entry you want to create an ELO link for.
2. Drag and drop the entry outside of the client, e. g. on your desktop.
3. Release the mouse button.
The ELO link is created.
4. Click the link to open the corresponding entry in ELO.

Save table to clipboard

Available in: *Ribbon > Output > Save*

Use this function to copy the currently selected table entries to the clipboard. The entries can then be inserted into an external program, e. g. Microsoft Excel.

Alternatively available in: *Toolbar > Display options > Table*.



Folder synchronization

Available in: *Ribbon > Output > External link*

The function *Folder synchronization* enables you to synchronize data in an ELO folder with an external file system or a mobile device or create a copy of the folder. For example, you can take all the documents you need to external appointments and then import any changes back into ELO.

Requirement: First you need to map the ELO folder to an external folder via [Output > External link > Configure folder](#).

ELO checks whether synchronization folders from known cloud service providers are located on your computer. You are then asked if you want to use these folders as counterparts for folders in ELO. You can also synchronize folder pairs of your choice. The function automatically synchronizes data in both directions. In addition to synchronizing documents, it is also possible to map folder structures.

You can access data in your provider's cloud and edit it from any Internet-ready device. Once you log back on to the ELO Java Client, you can transfer changes or new files to ELO.

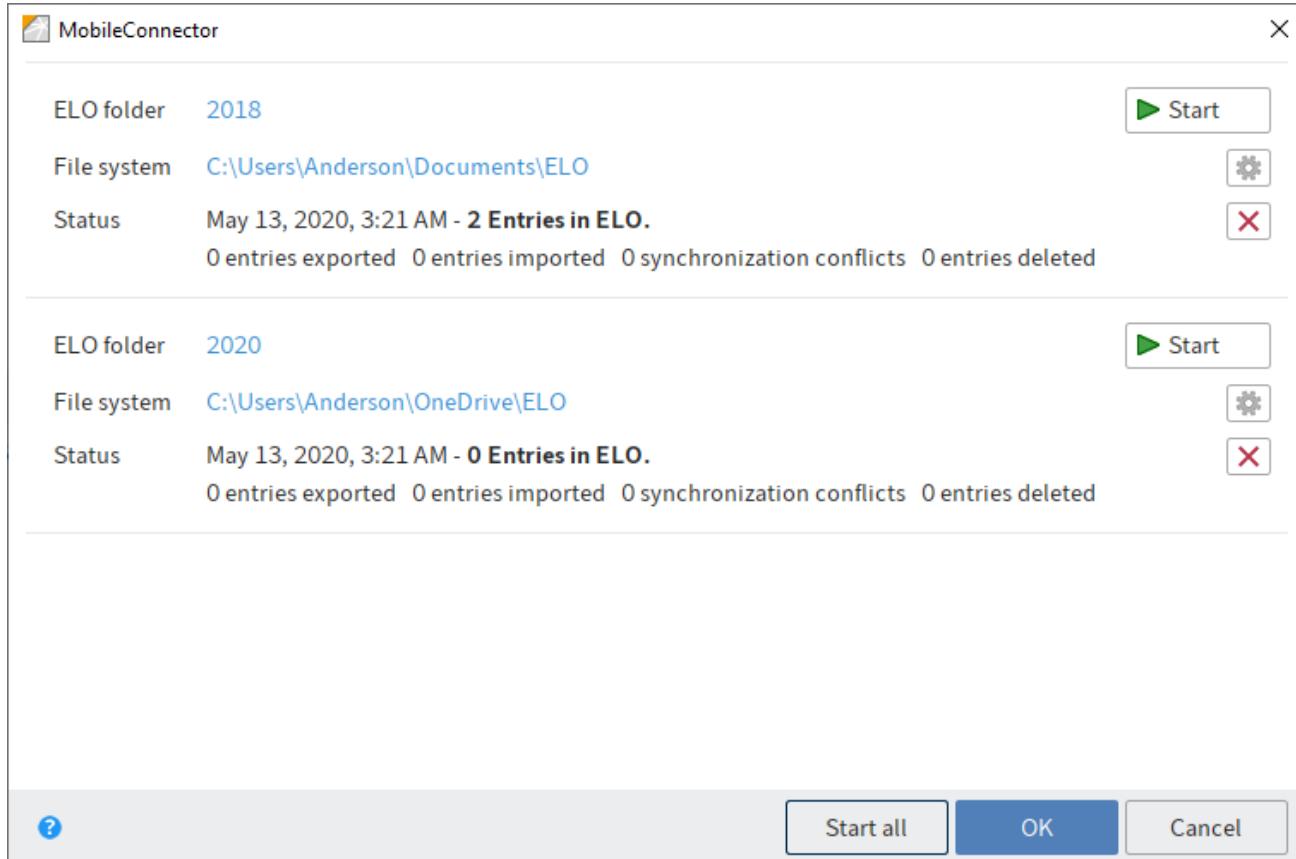
Important

As you can synchronize in both directions, this may cause documents to be deleted on the computer's file system.

The following describes how to use folder synchronization once you have set up least one folder pair. You can find more information on how to do this in the section [Configure folder](#).

Method

1. On the ribbon, click *Output > External link > Folder synchronization*.



The *Folder synchronization* dialog box opens. You will see existing folder pairs and the status of the last synchronization run.

The dialog box contains the following options:

Start (green triangle): Click this button to begin synchronization for the respective folder pair.

Please note

If you have enabled the option *Synchronize without metadata* in the settings and add a file to the folder in the file system, the file name must start with a plus icon (+) so that it is transferred to ELO during synchronization. The plus icon in the file name is automatically removed during synchronization.

Settings (gearwheel icon): Click this button to open the *Add folder* dialog box. You can change the settings for the respective folder pair here. If the settings for a folder pair were changed, you will see an orange bar in front of the folder pair in the *Folder synchronization* dialog box.

Delete (X icon): Click this button to remove the folder pair.

Information

Deleting a folder pair does not delete the folders themselves. It only removes the folder mapping.

Start all: Click this button to start synchronization for all available folder pairs.

Please note

If you delete and edit the JSON files, you will lose important data about the synchronization process.

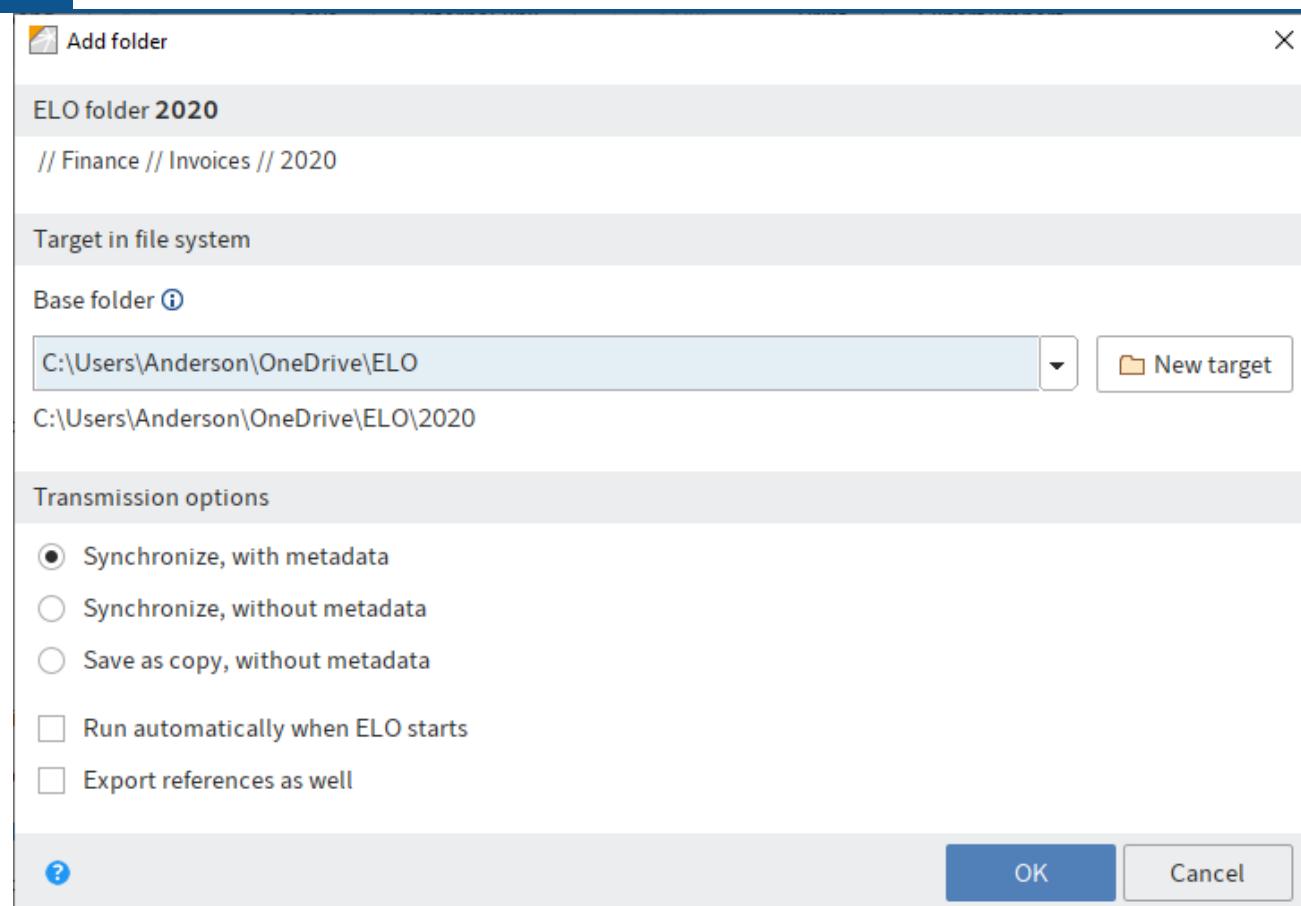
Configure folder

Available in: *Ribbon > Output > External link*

The *Configure folder* function enables you to configure an ELO folder for synchronization with a folder outside of ELO or save a copy.

To select a folder for synchronization, follow the steps below.

1. Select a folder in ELO.
2. On the ribbon, click *Output > External link > Configure folder*.



In the *Add folder* dialog box, you specify the target folder in the file system and define the transmission settings.

ELO folder

Under *ELO folder*, you can see the folder selected in ELO.

Target in file system

Under *Target in file system*, you can see the folder selected as the target in the file system. You can select existing paths from the drop-down menu of the *Base folder* field. Click *New target* to assign a different folder.

Information

The module automatically searches for cloud folders from the following providers: Dropbox, Google Drive, Microsoft OneDrive, GMX MediaCenter, WEB.DE Online-Speicher, and SpiderOak Hive. If this kind of folder is detected on the computer's file system, ELO automatically enters the detected path under *Base folder*.

Transfer options

In the *Transfer options* area, you can adjust the synchronization settings. The following settings are available:

Synchronize, with metadata: The folders selected above are synchronized. An additional file is stored on the file system for each synchronized entry (folder or document). This additional file saves the metadata of the synchronized entry in JSON format.

Synchronize without metadata: The folders selected above are synchronized. This option synchronizes the documents and child folders but ignores the metadata. If you add a file to the folder in the file system, the file name must start with a plus icon (+) so that it is transferred to ELO during synchronization. The plus icon in the file name is automatically removed during synchronization.

Save as copy without metadata: The *Save as copy* option saves an identical copy of the folder to the Windows file system but without metadata (GUID, metadata information).

Run automatically when ELO starts: If you select the option *Run automatically when ELO starts*, the base folder and ELO folder are synchronized every time ELO starts.

Please note

If you need to synchronize a large number of folders, this will delay all other processes when starting ELO. For this reason, this function is not recommended for very large directories that rarely change. In such cases, it makes more sense to create multiple folder pairs and only set up automated synchronization for selected ones.

Export references as well: Enable the *Export references as well* option to also export references in the folder for synchronization.

Additional information

To start the folder synchronization, click [Output > External link > Folder synchronization](#) on the ribbon.

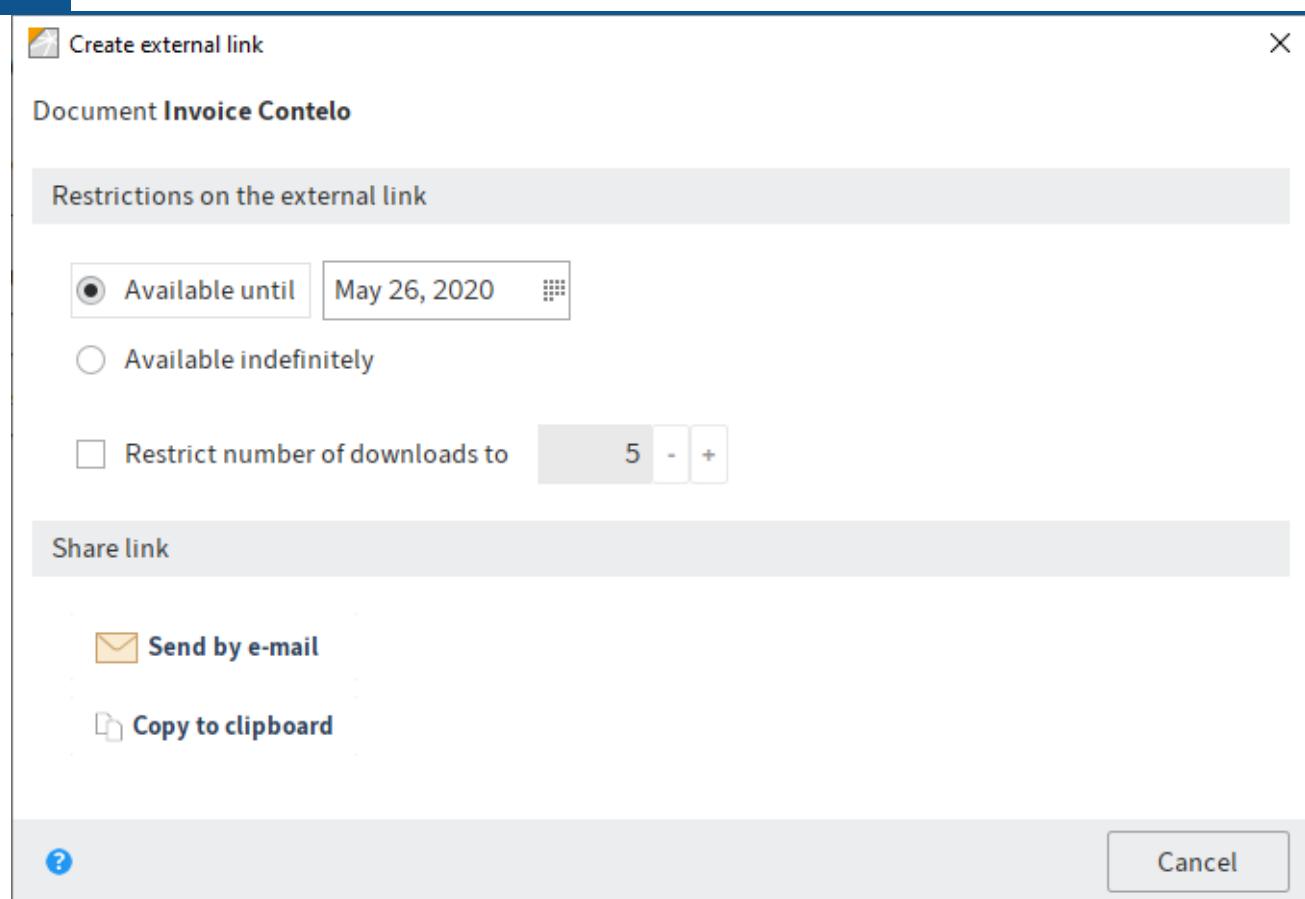
Create external link

Available in: *Ribbon > Output > External link*

The external link enables users without ELO to access documents. You can send the external link to people outside your company network, e. g. by e-mail.

Information for administrators

Without additional configuration, the function is only available for computers that are in the same network or domain as the ELO server. For information on enabling the function for external devices, refer to the [ELO server](#) documentation.



Restrictions on the external link

Available until: Specify a date to limit access to the document by an external user.

Available indefinitely: This function makes the document available to the user for an unlimited amount of time.

Restrict number of downloads to: This option lets you determine how often the document can be downloaded.

Share link

Send by e-mail: Send an e-mail with the external link to the shared document.

Copy to clipboard: The external link is available in the clipboard for further use, such as in an HTML document. It can be used with an HTML document, for example.

Information

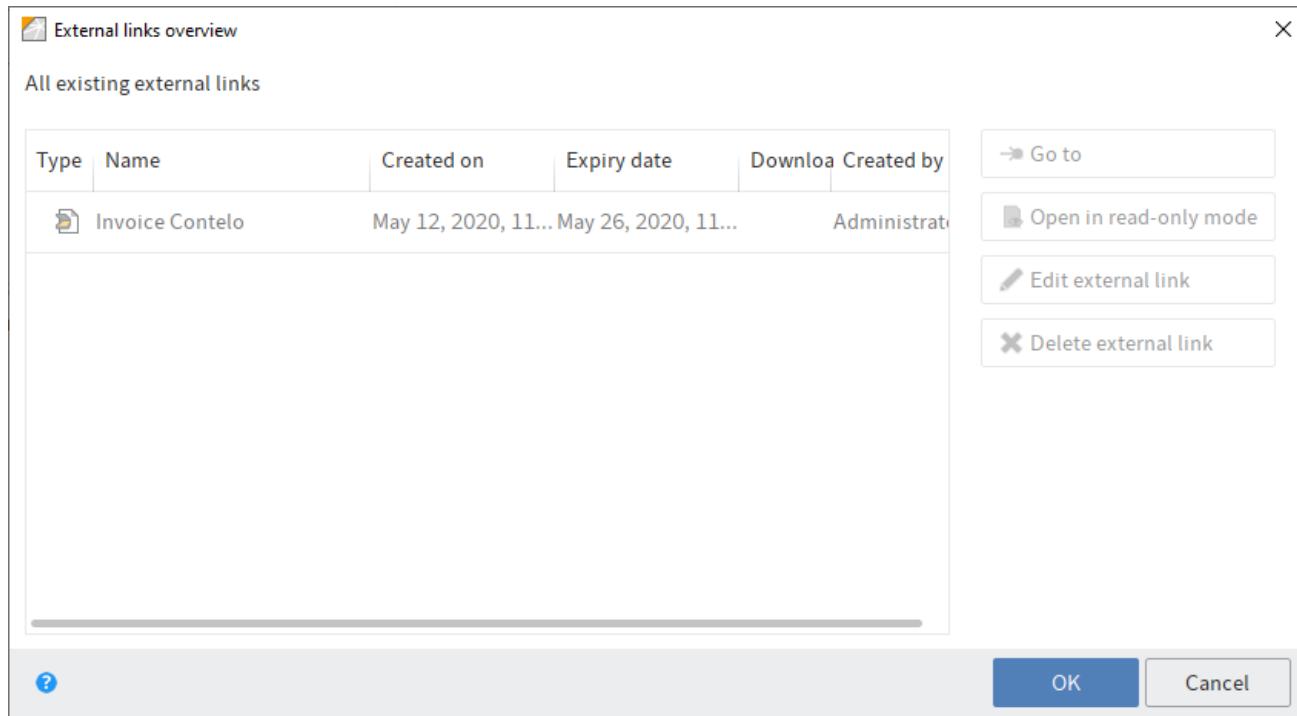
If you have selected multiple documents, the *Copy to clipboard* function is not available.

Outlook

You can open an [external links overview](#). You can edit or delete the external links here.

External links overview

Available in: *Ribbon > Output > External link*



The *External links overview* dialog box contains an overview of the documents for which an external link was created. You can edit or delete the external links.

The list is divided into the following columns:

Type: You see which type of document the respective external link is in the *Type* column.

Name: You see the short name of the document to which the external link refers in the *Name* column.

Created on: You see when the external link was created in the *Created on* column.

Available until: You see how long the external link is available in the *Available until* column. If a time is not specified, the link can be accessed indefinitely.

Access count: The *Access count* column tells you how many times the external link can be accessed. If a number is not entered, the link can be accessed an unlimited number of times. Every time the external link is accessed, the number of times it can be accessed again decreases.

Created by: You see which user created the external link in the *Created by* column.

The dialog box has the following buttons:

Go to: The *Go to* button takes you straight to the respective document.

Open in read-only mode: Click *Open in read-only mode* to open the respective document in an external application.

Edit external link: Use the *Edit external link* button to open the *Edit external link* dialog box. You can [change the settings of the selected external link](#) here.

Delete external link: Use the *Delete external link* button remove the selected external link. The external link is initially marked red. The link is deleted once you close the dialog box via the *OK* button. If you close the dialog box with the *Cancel* button, the delete action is reversed.

Manage mobile devices

Available in: *Ribbon > Output > External link*

This function allows you manage the mobile devices used to transfer documents to the ELO Java Client with the ELO Connect app. The connection settings are configured in ELO Connect. A new device will only show up in the *Manage mobile devices* dialog box after data has been transferred.

You can rename the mobile devices or delete them from the list (X icon).

For more information, refer to the [ELO Connect](#) documentation.

Print document

Keyboard shortcut: CTRL + P

This function enables you to print a document selected in ELO.

Print metadata

Available in: *Ribbon > Output > Print*

You can use this function to print the metadata of a selected entry. Only the basic information that is also displayed on the *Metadata* tab is printed.

You will find more information on metadata here.

Fax document

Available in: *Ribbon > Output > Print*

Use this function to send a document as a fax. This function uses the fax printer configured in the *Configuration* dialog box (*Ribbon > User menu [your name] > Configuration > Technical presets > General > Set as fax printer*).

Information

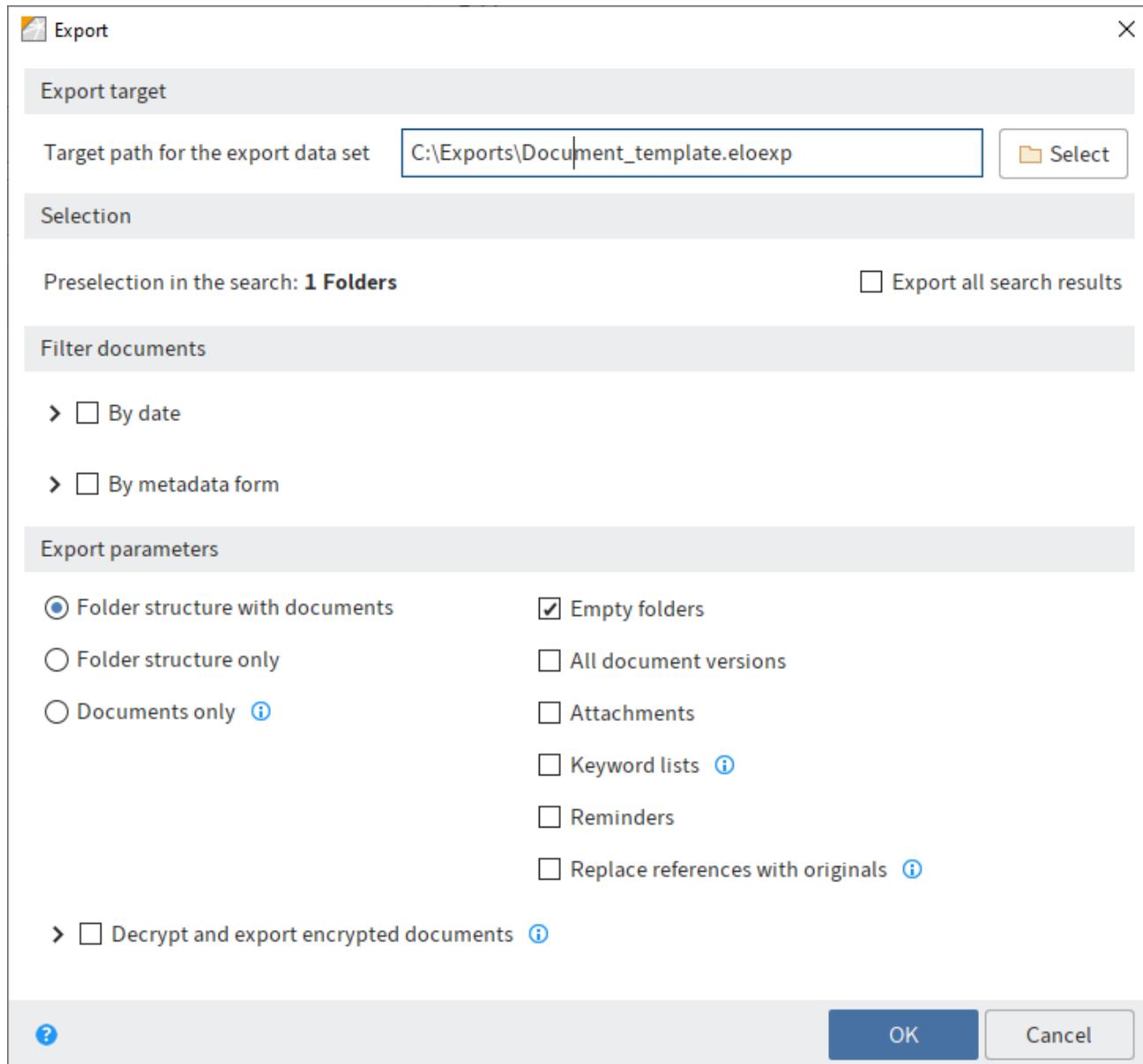
If you don't have a printer with a fax function, the document will be printed.

Export

This function enables you to export folders or documents from ELO. You can also export the entire repository.

Information

To export the entire repository, select the top level of the *Repository* work area.



Use this dialog box to make settings for the file export.

Export target

In the *Export target* dialog box, you can see the target path for exporting the data set if this has already been selected.

Select: Clicking *Select* opens the dialog box for selecting the target path and specifying the file name. The file type must be *ELOEXP*.

Selection

In the *Selection* area, you can see how many elements (folders or documents) you have selected for export.

Filter documents

In the *Filter documents* section, you can set filters for restricting which documents you want to export.

By date: If you have enabled the *By date* option, you can set a date range for the document date and the filing date. Only documents within these date ranges will be exported.

By metadata form: If you enable the *By metadata form* option, you can select one or multiple metadata forms from the drop-down menu. Only those documents that were assigned the selected metadata form(s) will be exported.

Export parameters

In the *Export parameters* area, you determine which components will be taken into account during export. You can choose from *Folder structure with documents*, *Folder structure only* and *Documents only*. Depending on your selection, you can select additional export options. This includes *All document versions*, *Keyword lists*, *Reminders*, and the option *Replace references with originals*.

Folder structure with documents: If the option *Folder structure with documents* is enabled, the folder structure and the documents in it will be exported.

Folder structure only: If the option *Folder structure only* is enabled, the folder structure is copied without documents.

Documents only: If the option *Documents only* is enabled, the documents are copied without the folder structure.

Empty folders: If you enable the *Empty folders* option, folders that are empty will also be exported.

All document versions: If the *All document versions* option is enabled, all document versions will be exported.

Attachments: If the *Attachments* option is enabled, attachments are exported as well.

Keyword lists: If the *Keyword lists* option is enabled, the keyword lists assigned to the metadata forms are exported with the entries.

Please note

Keyword lists that already exist in the target repository may be replaced during import. If there are identical metadata forms in the export data set and the target repository, check whether you want to import the keyword lists as well.

Reminders: If the *Reminders* option is enabled, reminders are also exported with the entries.

Replace references with originals: If the *Replace references with originals* option is enabled, references will be replaced with their original files during export. If this option is disabled, references are only replaced if the original documents were not exported with the entries.

Decrypt and export encrypted documents: This option also includes encrypted documents in the export.

OK: Click *OK* to start the export.

Import

This function enables you to import data into the *Repository* work area.

Please note

You can only import data that was previously exported from an ELO repository.

The screenshot shows the 'Import' dialog box. It has fields for 'Source' (set to 'C:\Exports\Document_template.eloexp'), 'Import target' (radio button selected for 'Apply from export data set: Repository1 // Documentation'), 'Method' (radio button selected for 'Check GUIDs'), and 'Options' (checkboxes for 'Keep filing date', 'Import keyword lists', and 'Re-encrypt documents'). At the bottom are 'OK' and 'Cancel' buttons.

Source	C:\Exports\Document_template.eloexp	Select
Import target	<input type="radio"/> Repository1 // Documentation // Sample documents <input checked="" type="radio"/> Apply from export data set: Repository1 // Documentation	Select
Method	<input checked="" type="radio"/> Check GUIDs <small> ⓘ </small> If GUID already exists: Reassign GUID <input type="radio"/> Reassign GUIDs of all entries (no verification whether GUID already exists)	
Options	<input type="checkbox"/> Keep filing date <input type="checkbox"/> Import keyword lists <small> ⓘ </small> ➤ <input type="checkbox"/> Re-encrypt documents <small> ⓘ </small>	

?

OK Cancel

Source

Select: Click the *Select* button next to the *Source* field to choose a source for the import. The source must be a ZIP or ELOEXP file.

Import target

Define an import target in ELO. You can either select a new target in ELO or copy the old filing location from the export data set.

Select: Click the *Select* button next to the *Import target* field to select an import target in ELO.

Apply from export data set: If you select the *Apply from export data set* option, the data set imported will retain the structure it had when you exported it. The respective structure is displayed next to the option.

Method

The following methods are available for handling GUIDs:

Information

A globally unique identifier (GUID) is a number with 128 bits used for the unique identification of documents and folders in ELO on distributed computer systems.

Check GUIDs: When importing the data set, the GUIDs are compared with the GUIDs in ELO. The following options are available if there are identical GUIDs:

- Reassign GUID: Entries that have an existing GUID in ELO are imported with new GUIDs. This allows you to create duplicates.
- Do not import: Entries that have an existing GUID in ELO are not imported.
- File as new version: Entries that already have a GUID in ELO are imported as a new version of the corresponding entries.

Reassign GUIDs of all entries: ELO does not check whether GUIDs already exist during import. All entries from the import data set are assigned new GUIDs. This allows you to create duplicates.

Options

Keep filing date: Select the *Keep filing date* option to retain the filing date.

Import keyword list: This option allows you to import keyword lists from the data set.

Re-encrypt documents: If you select the *Re-encrypt documents* option, a list of the found encryption keys appears. To import entries with an encryption key in encrypted form, enter the corresponding passwords. If you do not enter a password for an encryption key, entries in the corresponding encryption key will be imported unencrypted.

OK: Click *OK* to start the import.

'Organize' tab

Move

Available in: *Repository* work area

You can link entries (folders or documents) within the tree structure.

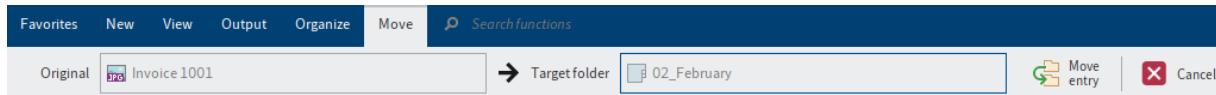
The following options are available for moving entries:

- ['Move' function](#)
- [Drag-and-drop](#)

'Move' function

Method

1. Select the entry you want to move.
2. On the ribbon, click *Organize > Move*.



The *Move* tab opens. The selected entry is displayed in the *Original* field.

3. Select the target folder in the tree structure.

The selected folder is displayed in the *Target folder* field.

4. Click *Move entry*.

If the permissions of the entry do not match the permissions at the target location, the *Move entries* dialog box opens. You can modify the [permissions](#) of the moved entries in this dialog box.

Optional: You can also save your selection so that the dialog box doesn't appear the next time you run the function. You can change your selection in the configuration (available in: *User menu [your name] > Configuration > Dialog boxes > Inherit permissions when moving entries*).

Result

The entry is moved to the target folder.

Drag-and-drop

Method

1. Click the entry you want to move and drag it to the target folder holding down the mouse button.

The *Drag-and-drop* dialog box opens.

2. Choose whether you want to move or [reference](#) the entry. A reference ascribes to an entry.

Optional: You can also save your selection so that the dialog box doesn't appear the next time you run the function. You can change your selection in the configuration (available in: *User menu [your name] > Configuration > Dialog boxes > Drag-and-drop*).

Reference

Available in: *Ribbon > Organize > Structure*

Use this function to create a reference to a document or folder selected in ELO. A reference is a link between a copy of an original document. The document only exists once physically in ELO. All changes to the document automatically apply to the references. This prevents duplicates.

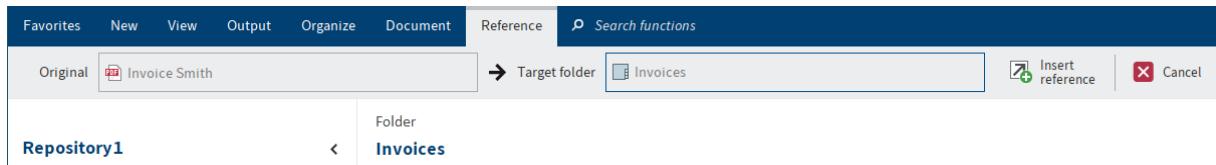
The following options are available for referencing entries:

- ['Reference' function](#)
- [Drag-and-drop](#)

'Reference' function

Method

1. Open the *Repository* work area.
2. Select a document or a folder.
3. On the ribbon, click *Organize > Structure > Reference*.



The *Reference* tab opens.

The name of the selected document or folder is displayed in the *Original* field. You will be asked to select a target folder in ELO.

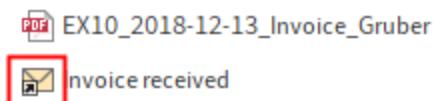
4. Select the folder in ELO that you want to create the reference in.

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

5. Click *Insert reference*.

Result

The *Reference* tab closes. The reference is created in the selected target folder.



An arrow icon indicates that it is a reference.

Drag-and-drop

Method

1. Click the entry you want to reference and drag it to the target folder holding down the mouse button.

The *Drag-and-drop* dialog box opens.

2. Choose whether you want to reference or [move](#) the entry.

Optional: You can also save your selection so that the dialog box doesn't appear the next time you run the function. You can change your selection in the configuration (available in: *User menu [your name] > Configuration > Dialog boxes > Drag-and-drop*).

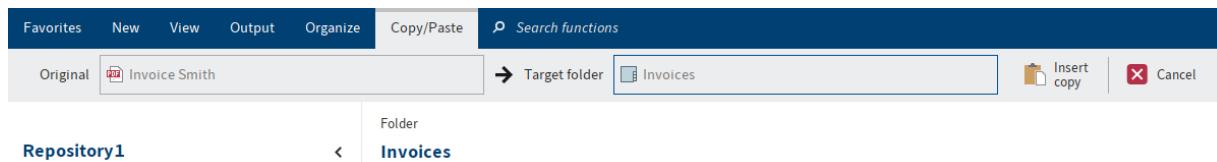
Copy

Available in: *Ribbon > Organize > Structure*

Use this function to copy the currently selected entry to the clipboard. You can copy an individual document, a folder or a folder structure with child folders. Use the *Insert copy* function to insert an entry at the desired location in ELO.

Method

1. Select the entry in ELO that you want to copy.
2. On the ribbon, click *Organize > Structure > Copy*.



The *Copy/Paste* tab opens.

3. Select the target folder in ELO.

The target folder is entered in the *Target folder* input field.

4. Click *Insert copy*.

Depending on whether you have copied a document or a folder, the corresponding [Insert copy](#) dialog box opens.

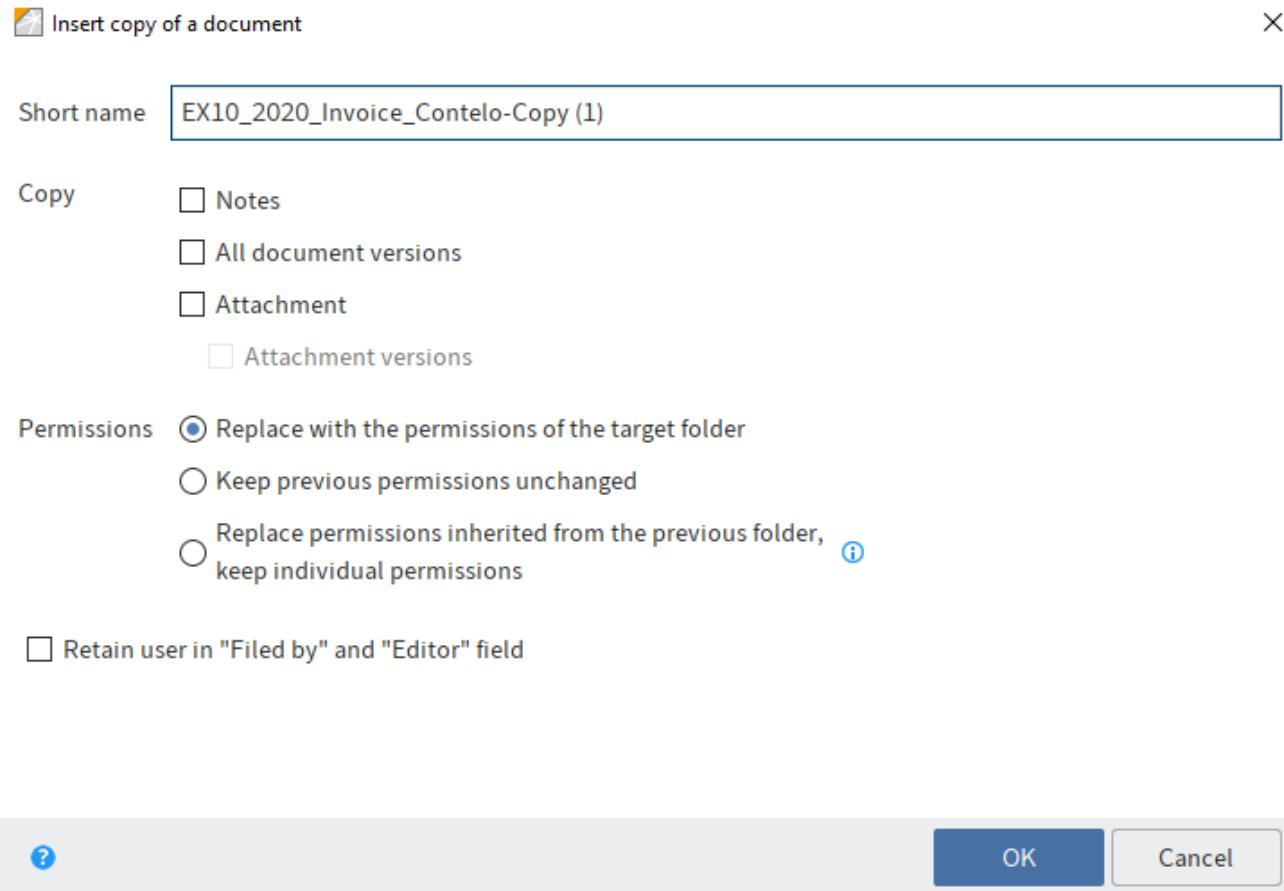
When copying documents or folders, you can choose from various options. For example, you can specify whether you want to keep the notes, the references, or the permissions.

5. Click *OK*.

Result

The copy is inserted in the target folder.

'Insert copy' dialog box



Insert copy of a document

If you want to insert the copy of a document, you have the following options under *Copy*.

Notes: If the *Notes* option is enabled, notes are copied as well.

All document versions: If the *All document versions* option is enabled, the version history of the documents is copied as well. Otherwise, the current working version is copied.

Attachments: If the *Attachments* option is activated, the current attachments are copied as well.

Attachment versions: If the *Attachment versions* option is enabled, the version history of the attachments is copied as well. Otherwise, the current attachment is copied.

Insert copy of a folder

If you want to insert the copy of a folder, you have the following options under *Copy*.

Basic entry only: If the option *Basic entry only* is enabled, only the selected folder without child entries is copied.

Folder structure only: If the option *Folder structure only* is enabled, the folder structure is copied without documents.

Folder structure with documents: If the option *Folder structure with documents* is enabled, the folder structure and the documents in it will be copied.

References: If the *References* option is enabled, references are copied as well.

Notes: If the *Notes* option is enabled, notes are copied as well.

All document versions: If the *All document versions* option is enabled, the version history of the documents is copied as well. Otherwise, the current working version is copied.

Attachments: If the *Attachments* option is activated, the current attachments are copied as well.

Attachment versions: If the *Attachment versions* option is enabled, the version history of the attachments is copied as well. Otherwise, the current attachment is copied.

Permissions

You can make the following settings for documents as well as folders:

Replace with the permissions of the target folder: The permissions of the copied entries are ignored and replaced by the permissions of the target folder.

Keep previous permissions unchanged: The copied entries keep the existing permissions.

Replace permissions inherited from the previous folder, keep individual permissions: The permissions of the copied entries are replaced with the permissions that apply for the target folder. Permissions that were not inherited from the original folder are retained.

Retain user in "Filed by" and "Editor" field: The users entered in the *Filed by* and *Editor* fields are copied from the original entries.

Insert default index

Available in: *Ribbon > Organize > Structure*

Use this function to insert a default index into a folder. A default index is a predefined child structure within a folder, e. g. a tab with a customer name, months, A-Z.

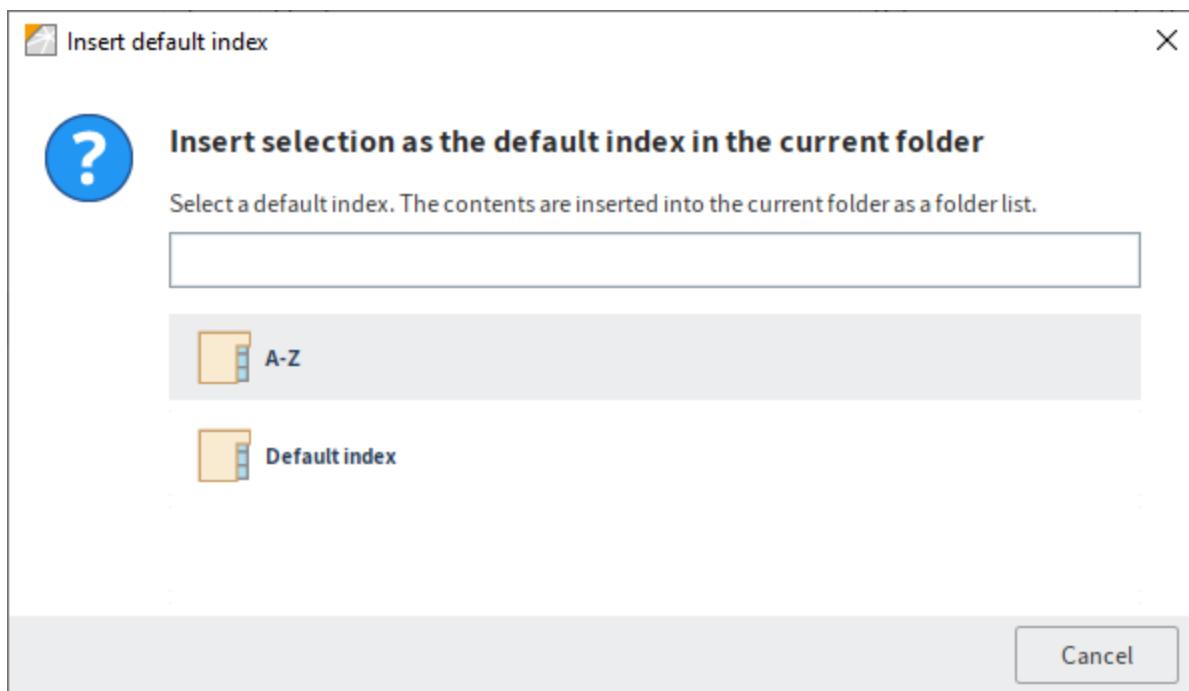
Requirement: You must have created at least one default index before you can perform the following steps. You can do this with the [Save as default index](#) function.

Method

- 1.

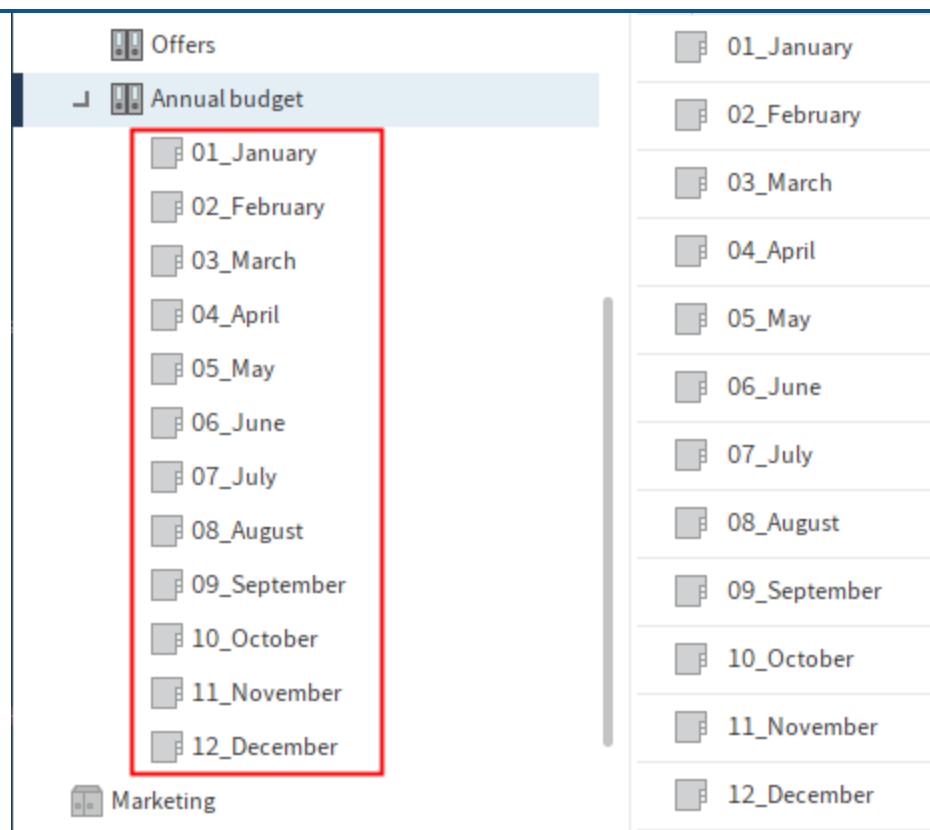
Open the *Repository* work area.

2. Select the folder that you want to add a default index to.
3. On the ribbon, click *Organize > Structure > Insert default index*.



The *Insert default index* dialog box appears.

4. Click the desired default index.



Result

The default index is inserted into the folder.

Save as default index

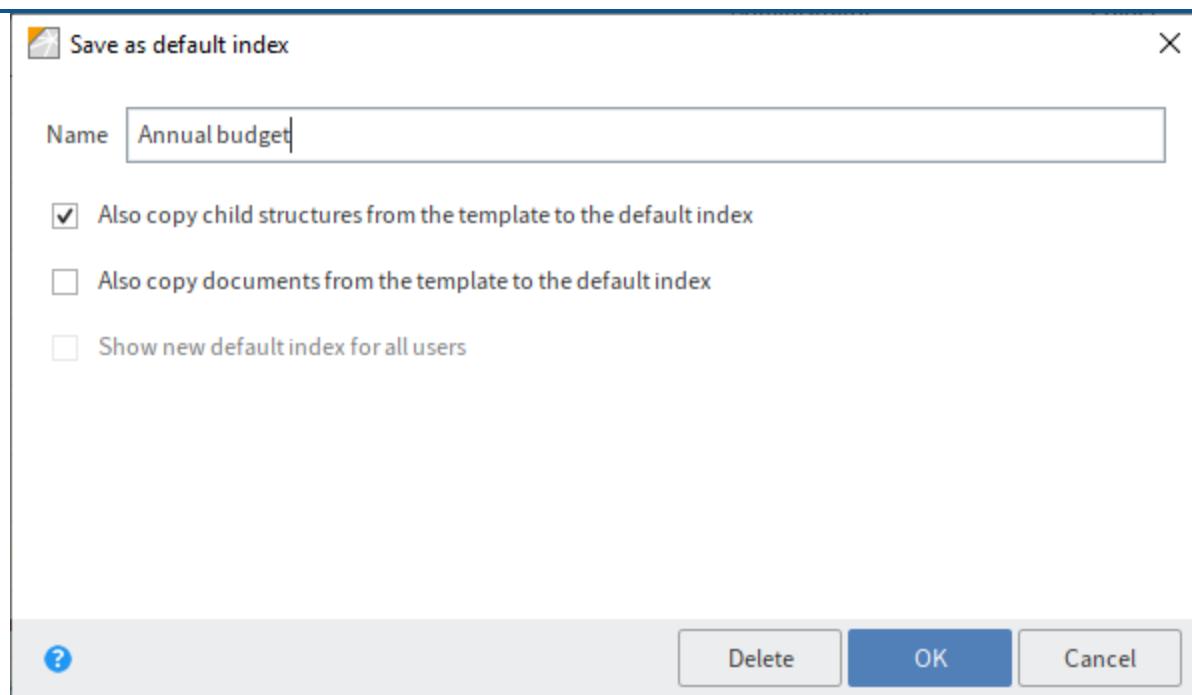
Available in: *Repository work area > Ribbon > Organize > Structure*

This function saves the folder structure of the selected folder as a default index. A default index is used as a template and can be used as often as required.

You can apply the default index to other folders via the [Insert default index](#) function. Documents or child folders with more than two levels are not saved.

Method

1. Click the folder that contains the child structure you want to save as a default index.
2. On the ribbon, click *Organize > Structure > Save as default index*.



The *Save as default index* dialog box appears.

3. Enter a name for the new default index.

Optional: Select the desired options in the check boxes. You have the following options:

- Also copy child structures from the template to the default index: If this option is enabled, all child structures in the selected folder are transferred to the default index.
- Also copy documents from the template to the default index: If this option is enabled, all documents in the selected folder are transferred to the default index.
- Show new default index for all users: If this option is enabled, the default index is available to all (global) users. If not, it is only available to the (local) user who created it.

Global default indexes are stored under *Administration//Default Indexes*.

Local default indexes are stored under *<User> // data // Default Indexes*.

4. Click *OK*.

Result

The default index is stored and is available via the *Insert default index* function.

Outlook

To delete an existing default index, click *Delete*. The *Delete default index* dialog box opens. Click the default index you want to delete.

Metadata

This function allows you to view the metadata for the entry.

If you have permission, you can edit the metadata.

Metadata is data about a folder or a document.

It includes information on the entry itself, for example when it was filed, or its name in the *Repository* work area. It also includes the permissions structure for the entry, meaning which users have what access to the entry. The quality of a repository depends to a great extent on the quality of the metadata. Metadata allows you to organize documents in a standardized way and file them quickly to ELO. In addition, using metadata makes it easier to find documents.

A new metadata model was introduced with version ELO 21 in addition to the previous metadata model. Both models are used in parallel. In the following, these metadata models are referred to as generation 1 (gen. 1) and generation 2 (gen. 2).

In gen. 2, forms and metadata forms are shown differently in the *Metadata* dialog box. The metadata concept will remain the same.

There are three ways to open the *Metadata* dialog box manually. Select an entry and

- click *Organize > Metadata* on the ribbon.
- right-click to open the context menu, then click *Metadata*.
- press the keyboard shortcut F4.

This section provides information about entering metadata. Click on one of the following links to go straight to a topic:

- [Metadata forms](#)
- [Fields](#)
- ['Basic' tab](#)
- ['Extra text' tab](#)
- ['Options' tab](#)
- ['Permissions' tab](#)
- ['Version history' tab](#)
- ['Additional information' tab](#)
- [Identify personal data](#)
- [Delete entries with personal data](#)
- [Enter metadata with ELO Click OCR](#)

Information

If the ELO Barcode module is installed, ELO can extract metadata from barcodes. You can find more information on the ELO Barcode module and configuring it in the ELO Administration Console in the [ELO Barcode](#) documentation.

Metadata forms

You enter metadata into metadata forms. Metadata forms contain templates that are specifically created for this document type. All documents of the same type receive the same permission settings and are filed to ELO based on a fixed pattern.

The view and functions in the metadata forms depend on the metadata model.

Gen. 2 metadata form

The screenshot shows the 'Metadata' dialog box. On the left, a sidebar titled 'Available forms' lists 'Outgoing invoice' with several placeholder fields. The main area has tabs: 'Basic' (selected), 'Options', 'Permissions', 'Version history', and 'Additional information'. Under 'Basic', there's a section titled 'Basic data' with the following fields:

Short name *	EX10_Invoice_Contelo_0753
Invoice number *	EX-0753
Invoice status	open
Invoice date	03/01/2023
Filing date	03/08/2023 10:028 AM
Editor	Cole
Document date	03/03/2023 11:00 AM
Version	1

At the bottom, there are icons for file operations (New, Open, Save, Print) and a checkbox for 'Expand keyword list automatically'.

Gen. 1 metadata form

The Available forms area lists all the available metadata forms. The list contains either metadata forms for folders or for documents, depending on the type of entry selected in ELO.

Information

You can minimize the Available forms pane by clicking the Hide metadata forms icon (arrow icon pointing left). You can click the Show metadata forms icon (arrow icon pointing right) to make the pane reappear.

Please note

When you change the metadata form, metadata may be lost or incorrectly assigned.

Fields

The metadata for a document is entered into fields.

The type of field determines the data you need to enter and what you need to consider when doing so. There are different types of fields, which can be configured differently from metadata form to metadata form.

Text field: You can enter letters, numbers, and special characters in a text field.

Mandatory field: Fields can be configured as mandatory to complete the metadata entry. A red asterisk and a red marking indicates that a field is mandatory. Any conflicts are displayed at the bottom of the dialog box.

Icons

If a field contains an icon, this means that ELO helps you to enter content in the field.

The following tools are available:

 Keyword list

 Drop-down menu

 Calendar

 Clock

 Relation

Keyword lists

Customer



Keyword lists are used to standardize entries and make it easier to enter metadata.

There are two types of fields with keyword lists:

- You have to select an entry from the keyword list.
- You can select an entry from the keyword list or you can type in your own entry.

If you click a field and a keyword list appears, you cannot make entries.

Information

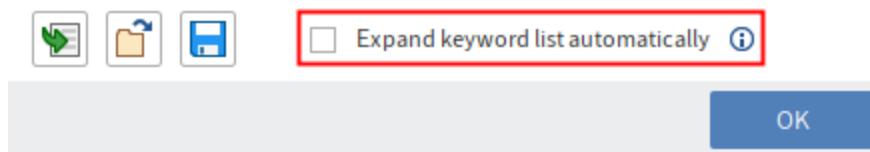
The following functions are only available in the gen. 1 metadata forms.

You can enter multiple keywords in these fields, separating them by a pilcrow sign (¶).

Please note

Keywords containing a pilcrow sign are treated like a list of keywords, as pilcrow signs are used as a separator between multiple values.

Expand keyword list automatically: If this option is enabled, the keyword list opens as soon as you start to type text into a field.



Information

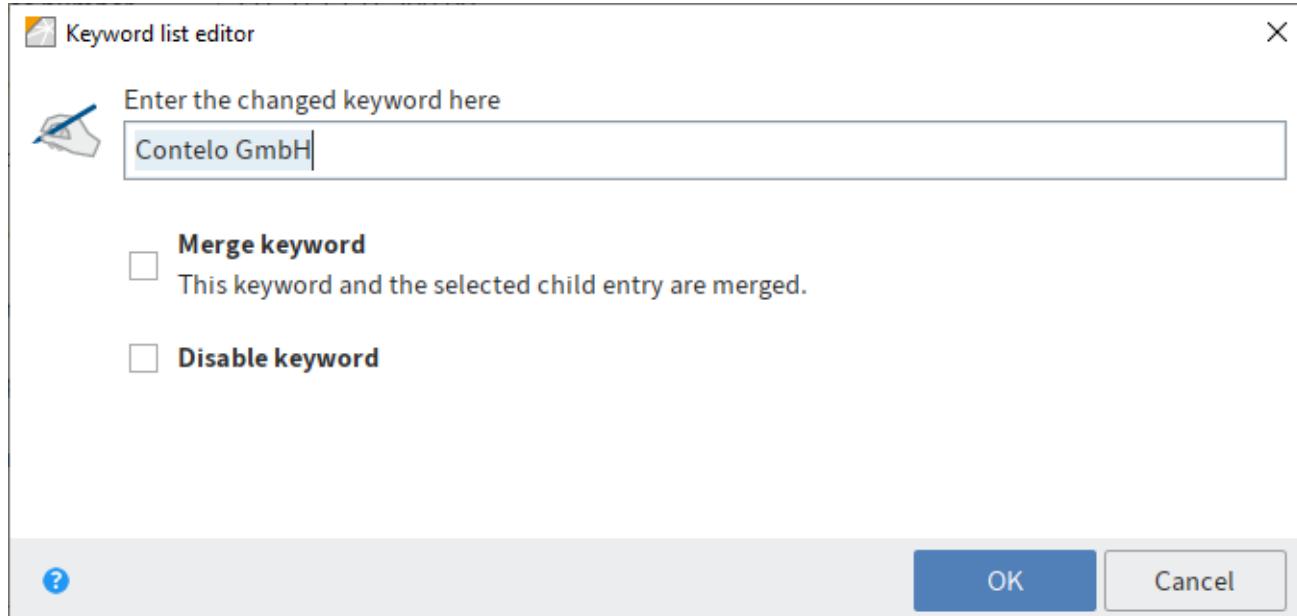
You can either click the check box to enable the *Expand keyword list automatically* option or use the keyboard shortcut CTRL+K.

If the *Expand keyword list automatically* option is disabled, you need to open the keyword list using the list icon at the bottom of the index field.

Alternative: Open the keyword list using the F7 key.

To edit the keyword list, right-click a keyword list entry.

You can add new keyword list entries or child entries via the context menu. You can edit or delete existing keyword list entries or child entries.



In the *Keyword list editor* dialog box, you change the name of a keyword.

The following options are also available:

Merge keyword: If a keyword has child entries, you can use this option so that the child entries are always inserted into the field together with the parent keyword. The parent keyword option must be enabled for this to work.

For example, if your keyword list contains the keyword *Invoice* with the child entries *Miller* and *Smith*, either the expression *Invoice Miller* or *Invoice Smith* will be used. You can only choose between the child entries of the keyword.

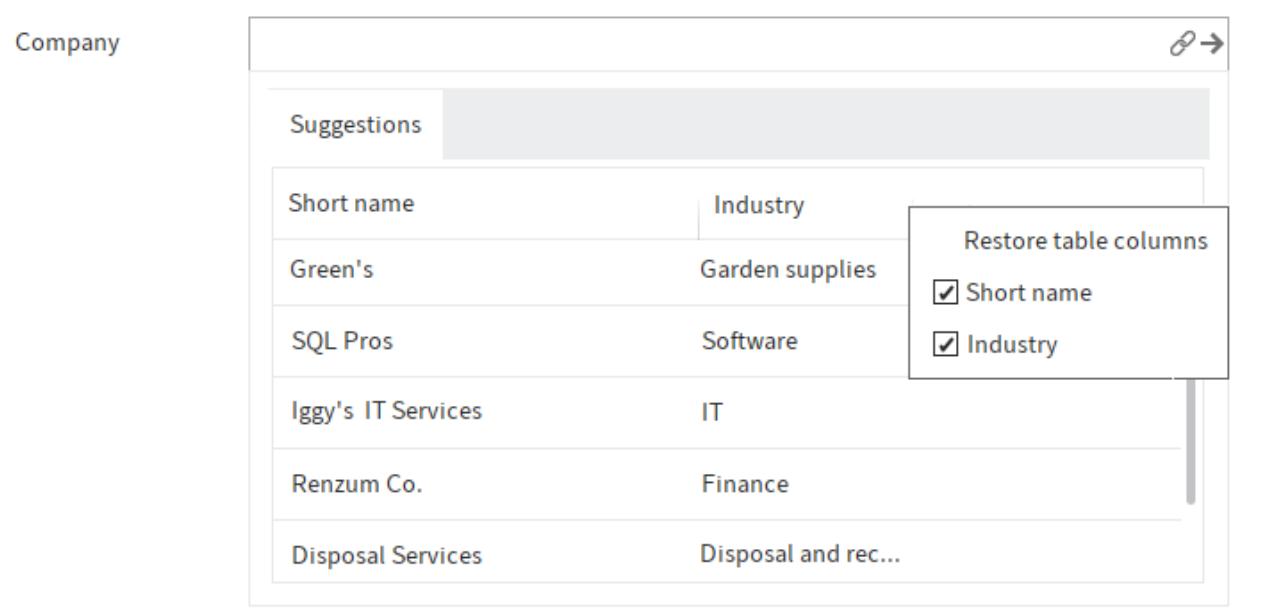
Disable keyword: Use this option to deactivate a keyword. The keyword can no longer be selected and will be grayed out.

Relations

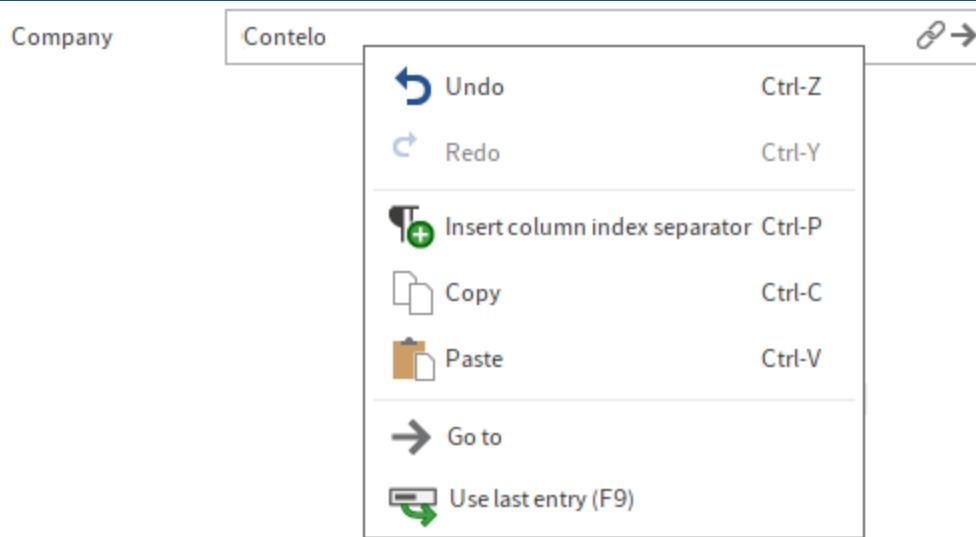
Relation type fields are used to link a field with the metadata of another entry.



Clicking the chain icon opens a list of entries. Select the entry you want to link. Navigate the list using the mouse or arrow keys.



Click the title of a column to sort the list. You can hide and show columns using the context menu, which you access by right-clicking in the column titles.



Clicking the arrow next to the chain icon takes you straight from the metadata of the entry to the metadata of the linked entry. Alternatively, right-click on the relation field to open the context menu and select the *Go to* button. The metadata of the linked entry is displayed in the *Metadata* dialog box.

Additional functions in the 'Metadata' dialog box

The *Metadata* dialog box offers the following additional functions:

Undo (CTRL+Z)

The keyboard shortcut CTRL+Z undoes the last action in a field.

Alternative (gen. 1 only): Click the *Undo* function in the context menu of the field (right-click).

Redo (CTRL+Y)

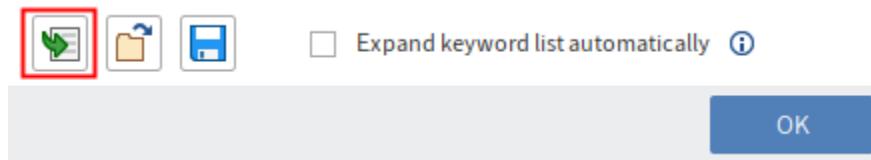
The keyboard shortcut CTRL+Y reapplies the last action that was undone in a field.

Alternative (gen. 1 only): Click the *Redo* function in the context menu of the field (right-click).

The following functions are also available for gen. 1 metadata forms:

- [Automatically enter metadata](#)
- [Pin function](#)
- [Use last entry](#)
- [Insert column index separator](#)
- [Load metadata](#)
- [Save metadata](#)

These functions are briefly explained in the following section.

Automatically enter metadata

The *Enter metadata using the most recently saved/displayed entries [F3]* button (icon with the green arrow) enables you to apply the metadata that you entered or viewed last.

Alternative: Call the function using the F3 key.

Information

The data in the fields *File name*, *Entry type*, and *Document path* are not overwritten with this function. The original data is retained in these fields.

Pin entry to field (Intray only)

To enter the same value to a field in multiple documents in the Intray, enable the function *Pin entry to field* using the F8 key.

Alternative: Click the *Pin entry to field* function in the context menu of the field (right-click).

A pin icon appears.

As soon as you file the next document with the same field, the value you entered previously will be applied.

Please note

The value is only saved for the current session. The ELO Java Client does not "remember" the value once you have closed the program.

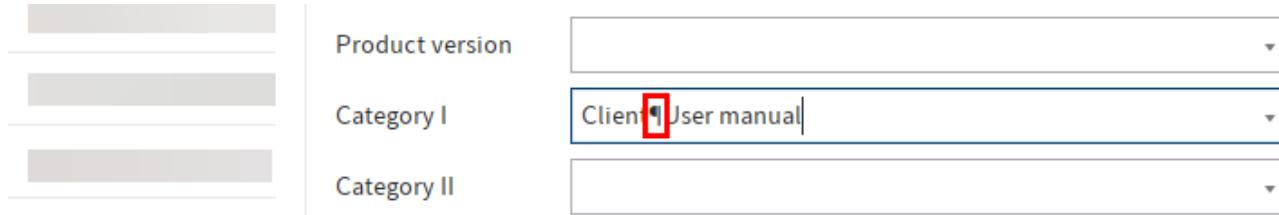
Use last entry

To reuse a value from a field the next time you enter metadata, use the F9 key.

Please note

The value is only saved for the current session. The ELO Java Client does not "remember" the value once you have closed the program.

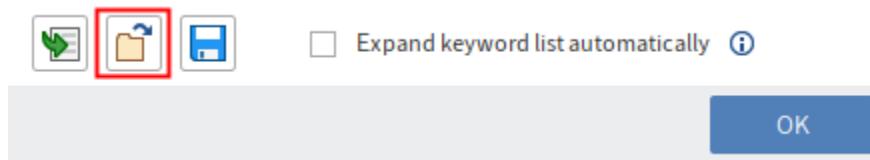
Insert column index separator



To save multiple values to a field, separate the values with a pilcrow character (¶). Use the keyboard shortcut CTRL+P.

Alternative: Click the *Column index separator* function in the context menu of the field (right-click).

Load metadata



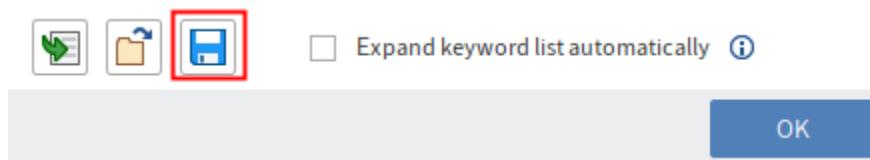
This button enables you to load a metadata file (.es8) into the current metadata for the document. Metadata of an ELO entry is stored in ES8 files.

Alternative: Call the function using the keyboard shortcut CTRL+L.

Information

When you load an ES8 file into the metadata, the existing metadata is overwritten without showing a confirmation.

Save metadata



Click this button to save the metadata of the current folder or document as an ES8 file.

Alternative: Call the function using the keyboard shortcut CTRL+S.

Tabs



Metadata forms are divided into tabs. There are several default tabs:

- Basic
- Extra text (only in gen. 1 metadata forms)
- Options
- Permissions
- Version history
- Additional information

The default tabs are briefly described in the following section. Additional tabs appear depending on the settings in the metadata form.

'Basic' tab

The *Metadata* dialog box opens to the *Basic* tab. It contains at least the following default fields:

Short name: Name of the entry that is shown in the tree structure in the *Repository* work area.

Document date (gen. 2)/Date (gen. 1): The document date refers to the date the associated file was last accessed. The document date is updated when changes are made to the document.

You can also edit the document date manually using the calendar function.

In gen. 1 metadata forms, you can enter information into this field using the following syntax:

- `+x` = today in X days
- `+xd` = today in X days (d for days)
- `+xm` = today in X months (m for months)
- `+xy` = today in X years (y for years)
- To enter a past date, use `-` (minus) instead of `+` (plus).

Example 1

Entering `+1m` on Dec 2, 2019 returns the date Jan 2, 2020. If you were to enter `-1y`, this would return the date Dec 2, 2018.

ELO also automatically completes the following entries:

- `05` is returned as <current month> 05, <current year>
- `Dec 5` is returned as Dec 5, <current year>

Example 2

Entering `31` on December 2, 2019 returns the date December 31, 2019.

Filing date: The filing date refers to the date the document is filed to ELO.

Version (gen. 2/Current version (gen. 1): Shows the individual version number (if entered). This is not the internal version counter.

Editor: Shows the user who last edited the document.

For folders only:

ELOINDEX: This field is for the filing definition. When filing documents automatically, ELO identifies where to file the document through the ELOINDEX.

'Extra text' tab

Information

This tab only appears in gen. 1 metadata forms.

In this text field, you can enter information that is not covered by the other fields, for example a more exact description or a comment. The field can also be used for script settings.

'Options' tab

The *Options* tab is where you specify the characteristics and behavior of an entry. Depending on whether you are entering metadata for a document or a folder, different settings will be displayed.

Metadata

Available forms < Basis Options Permissions Version history Additional information

Filter

Personal identifier

End of deletion period

End of retention period

Entry type Word

Font color System color
 Translate short name

Document status Version control enabled

Document path basis

Encryption No encryption
 Add to full text database
 Approval document
 Start point for replication
 Expand keyword list automatically

OK Cancel

The sidebar on the left shows a list of available forms, with "Outgoing invoice" currently selected.

General options

The following options are available for all folders and documents on the *Options* tab:

Information

You will find more information on the *Personal identifier*, *End of deletion period*, and *End of retention period* fields in the chapters [Identify personal data](#) and [Delete entries with personal data](#).

Entry type: This option is used to specify the type of the entry, e. g. a Word or PDF document. This setting determines the icon that is displayed in the list view in ELO.

Font color: Select a color for the entry to improve the visual clarity of your repository structure.

Translate short name: If the *Translate short name* option is enabled, the short name of the entry is translated into the selected display language.

Please note

In order for the translation to be displayed, a translation for the short name must have been entered in the translation table. You also need to configure the metadata form. If necessary, contact your system administrator.

Start point for replication: This option enables you to specify a folder as the starting point for replication. The next time replication takes place, the folder is placed in the *Replication Base* of the target repository. The administrator must insert the new folder at the desired location in the target repository. This enables you to replicate parts of repositories even if they have not been filed in identical structures. You will find more information in the [ELO Replication](#) documentation.

Object ID and GUID: The first number in this field is the internal ELO object ID. This entry is primarily for information purposes and cannot be changed. The object ID is required when testing the checksum, for example.

The character string in brackets specifies the GUID of the entry. The GUID (Globally Unique Identifier) is a unique identification number. This is automatically assigned and cannot be modified. This enables you to identify every entry uniquely, even outside of the repository.

Filed by: The user who created the entry is entered here.

Options for documents

The following options are only available for documents:

- Document status
- Document path
- Encryption
- Add to full text database
- Approval document
- File name

Document status: Select the editing status of the entry from the drop-down menu:

- Version control disabled: Only one version of the document is saved. The previous version is deleted and is no longer available.

Important

If you select this option, the previous version is overwritten each time you save. The *Document > Versions > Load new version* function overwrites the current version, and does not create a new one. For this reason, we do not recommend using this option.

- Version control enabled: If the document is edited, a new version is created. All changes are documented. Older versions can be restored.
- Non-modifiable: ELO does not allow changes to the document and its metadata.

Warning

The document status *Non-modifiable* cannot be reversed.

Document path: This is the document path (storage path) that has been set for the entry.

Encryption: You can select an encryption key here if you want to encrypt documents. This is recommended, e. g. if documents should only be available to a specific set of users. Users must have the password for the encryption key in order to view a document. Encryption keys are defined by your administrator. You will find more information here: [Encryption keys](#).

Important

The encryption process is irreversible. Encrypted documents remain encrypted.

Add to full text database: Enable this option to add the document to the full text database. This function indexes words so that they are available in the search.

Approval document: If this option is enabled, users with the *Author for approval documents* right are able to edit previous versions of the document without other users being able to view the document.

Two attributes separate an approval document from a normal document.

- After editing, a new version is created when checking in a document. The new version is not automatically set as the working version. To set a document version as the working version, use the function *Set as working version* (*Ribbon > Document > Document versions*).
- Before editing an approval document, the users are asked whether they want to check out and edit the working version, or the newest document version, i.e. the approval version.

Information

The *Approval document* function should primarily be used for workflows. Workflows are the best way to handle specific approval scenarios.

File name: The file name of the document as stored outside of ELO, for example.

Options for folders

The following options are only available for folders:

- Sort order
- Enable quick preview for documents in the folder

Sort order: This is where you can define how the contents of the corresponding folder will be sorted:

- Filing date: The entry with the most recent filing date is at the bottom.
- By filing date descending: The entry with the most recent filing date is at the top.
-

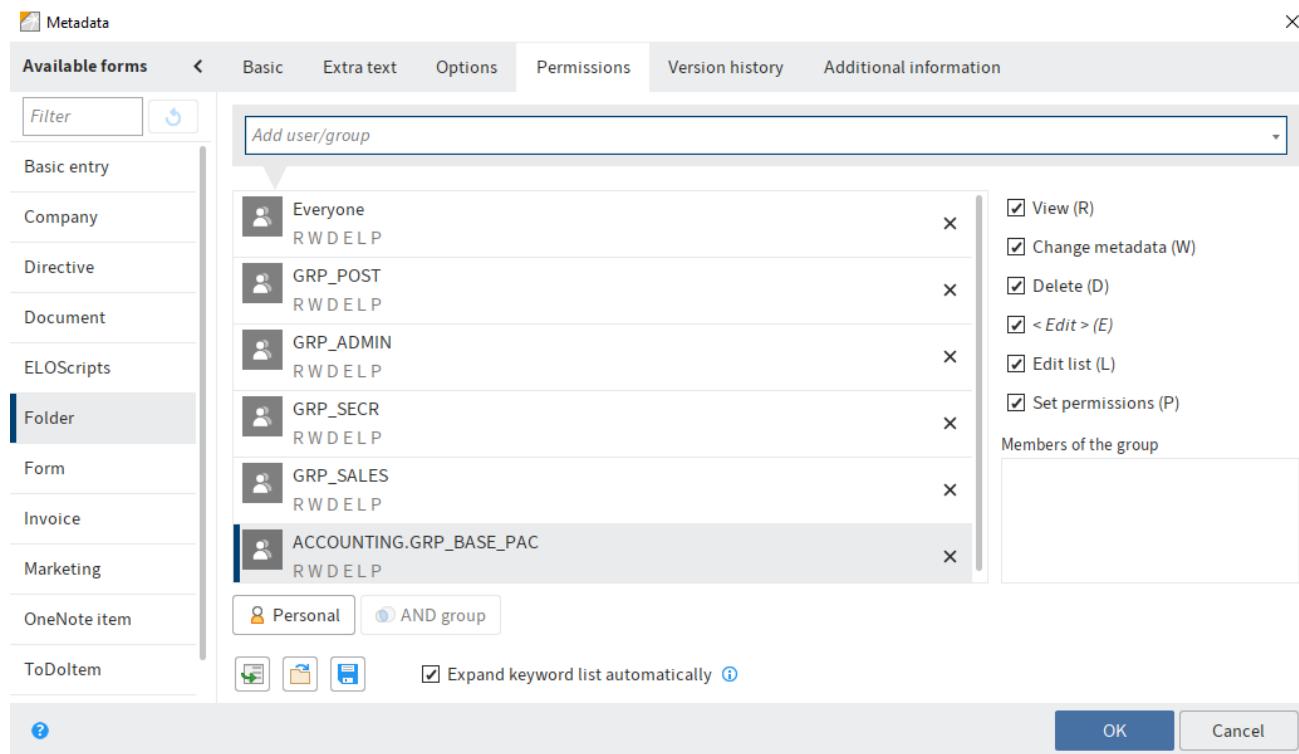
Alphabetical: Entries are sorted ascending from A to Z.

- Alphabetical descending: Entries are sorted descending from Z-A.
- Date: The entry with the most recent document date is at the bottom.
- By date descending: The entry with the most recent document date is at the bottom.
- Manual: You can move the entries within the folder manually. To do so, the folder must be opened in the list view.

Enable quick preview for documents in the folder: Use this option to view the first document in a folder in the viewer pane as soon as you click the folder.

'Permissions' tab

The users and groups that have access rights to the selected entry are listed on the *Permissions* tab. Users with the corresponding rights are able to change the settings.



Add user/group: Search for the desired user or group in the *Add user/group* field. Suggestions will appear as you type.

Click the corresponding suggestion to select a user or a group.

Alternative: If you click the triangle to the right of the *Add user/group* field, this will open a drop-down menu. The drop-down menu contains a list of the users and groups you selected recently.

In the middle column, you can see which users or groups have already been assigned permissions for the selected entry and which permission settings apply.

To edit the permissions settings, select an entry in the middle column and select or clear individual permissions.

The following permissions are available:

- View (R): Users with *View* permissions have read access to the selected entry. These users can view the content of the entry.
- Change metadata (W): Users with *Change metadata* permissions can edit the metadata for the selected entry.
- Delete (D): Users with *Delete* permissions can delete the selected entry.
- Edit (E): Users with *Edit* permissions can edit the selected entry.
- Edit lists (L): This permission only applies to folders. Users with this permission can change the content of the respective folder. For example, they can create documents in this folder or move documents from the folder.
- Set permissions (P): A user with the right to *Set permissions* for an entry in the repository can change the permissions that other users have to this entry.

Information

Options that are not applicable are shown in italics and enclosed in pointy brackets.

Personal (orange user icon): Use the *Personal* button to assign yourself sole access to the respective entry. All other permissions will be revoked.

AND group: AND groups are useful if you only want to assign permissions to the users in a group that are also members of another group. To create an AND group, select two groups in the middle column and click *AND group*.

Members of the group: If you select a group, you will see the group members in the *Members of the group* column.

Double-click the corresponding user in the *Members of the group* column to select a member of a group.

Remove permissions: To remove all permissions from a user or group, click the X icon next to the selected user or group.

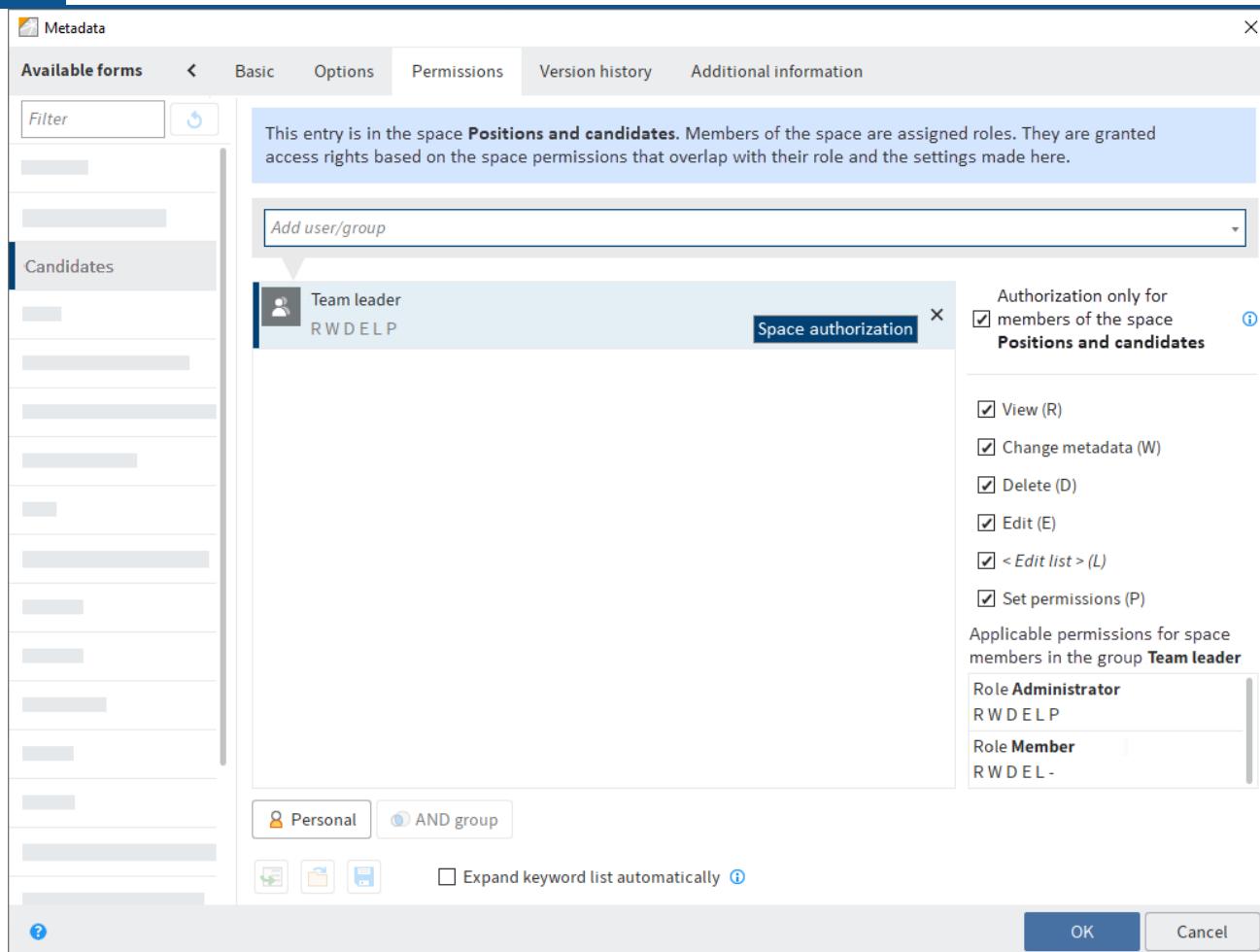
Please note

Keep in mind that when you revoke your own read permissions on an object, you can no longer see the entry in the repository. If you remove the *Set permissions* right, you will no longer be able to edit the permissions settings.

Permissions for entries in spaces

There are additional authorization options for entries that were created in a space.

You can find more information on spaces in the Spaces section.



Authorization only for members of the space<space name>: Users and group members granted this permission can only access the entry if they are members of the corresponding space.

Information

This option only appears for entries created in a space. For entries created elsewhere but displayed in a space, the permissions of the entry in the repository apply.

If you enable this option, the permissions granted to group members according to their role in the space overlap with the permissions granted in the *Metadata* dialog box.

The permissions to the entry at the individual user level also overlap in accordance with this.

Applicable permissions for space members in the group **Team leader**

Role Administrator

R W D E L P

Role Member

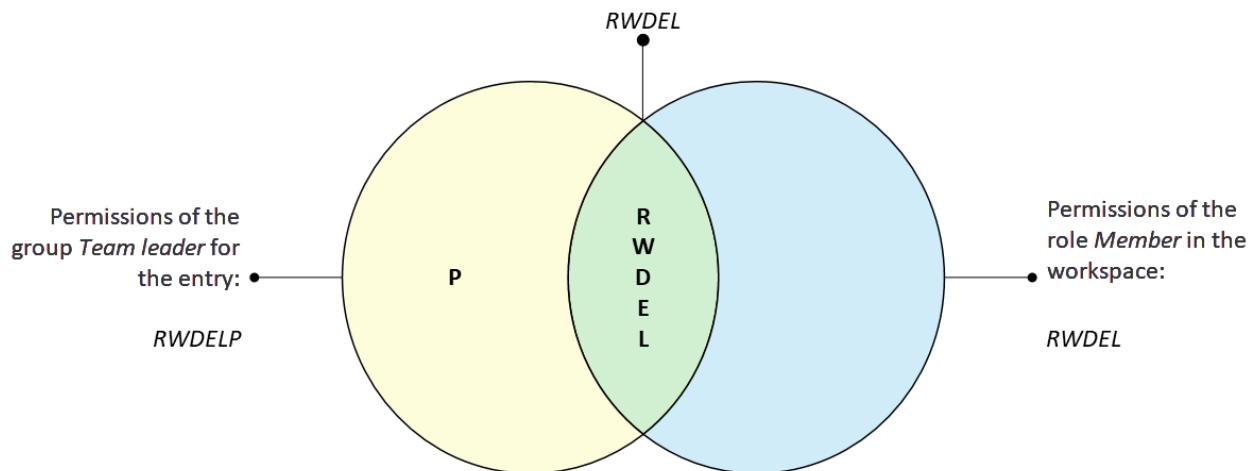
R W D E L -

You can see the permissions in effect when you select a user or group in the *Metadata* dialog box.

Example

A user has the *Member* role in the *Positions and candidates* workspace. Members have *RWDEL* permission for entries. The user is also a member of the *Team leader* group. In the *Metadata* dialog box, this group has all permissions for the entry.

Applicable user permissions for the entry in the workspace:

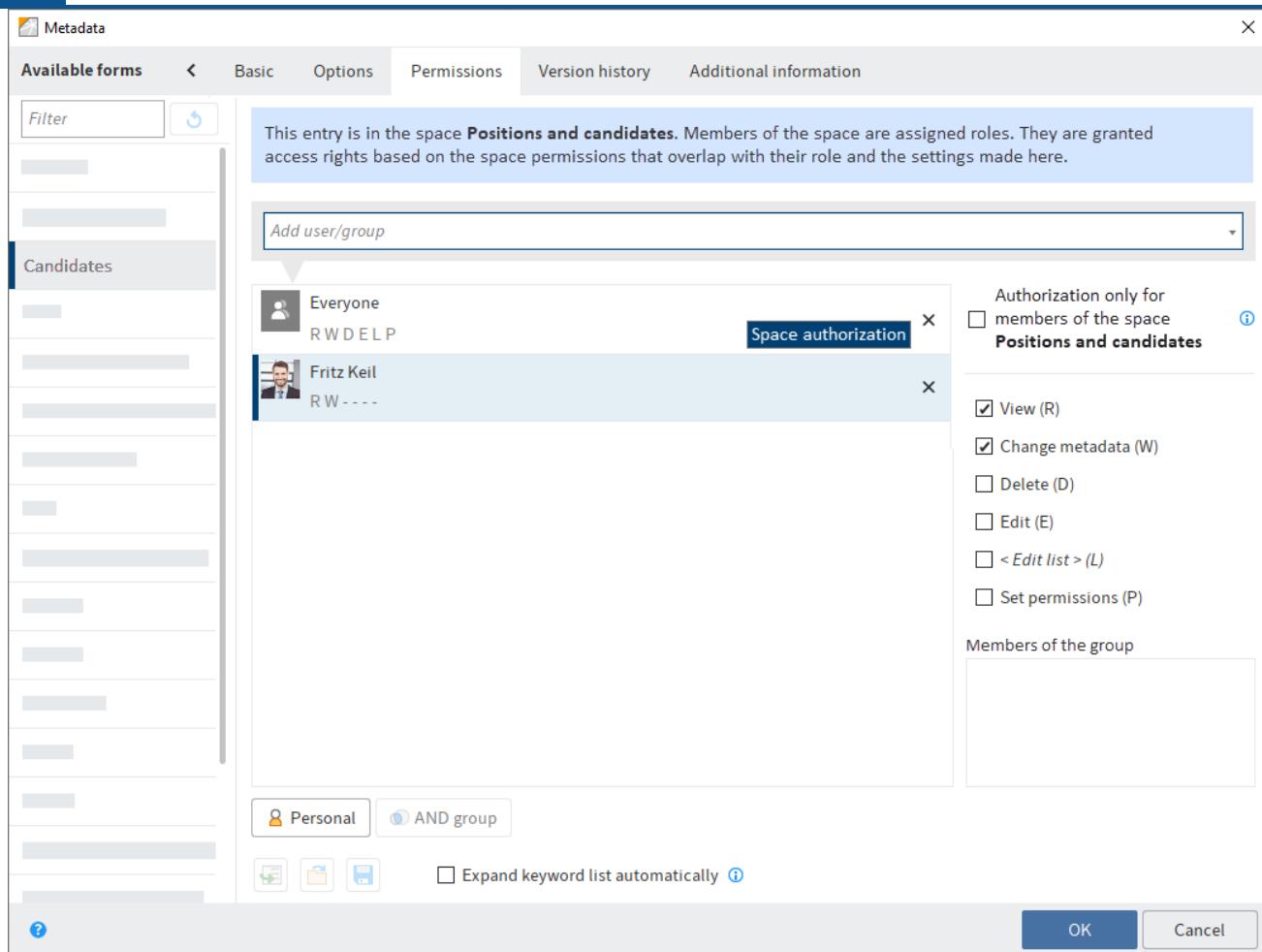


The user only has *RWDEL* permissions for this entry because only these permissions overlap.

Other members of the *Team leader* group will not have access to the entry unless they are also members of the workspace.

Grant a non-member access to an entry

You can grant users who are not members of a space access to entries in the space. Users can open these entries from the search or with ELO links, for example.

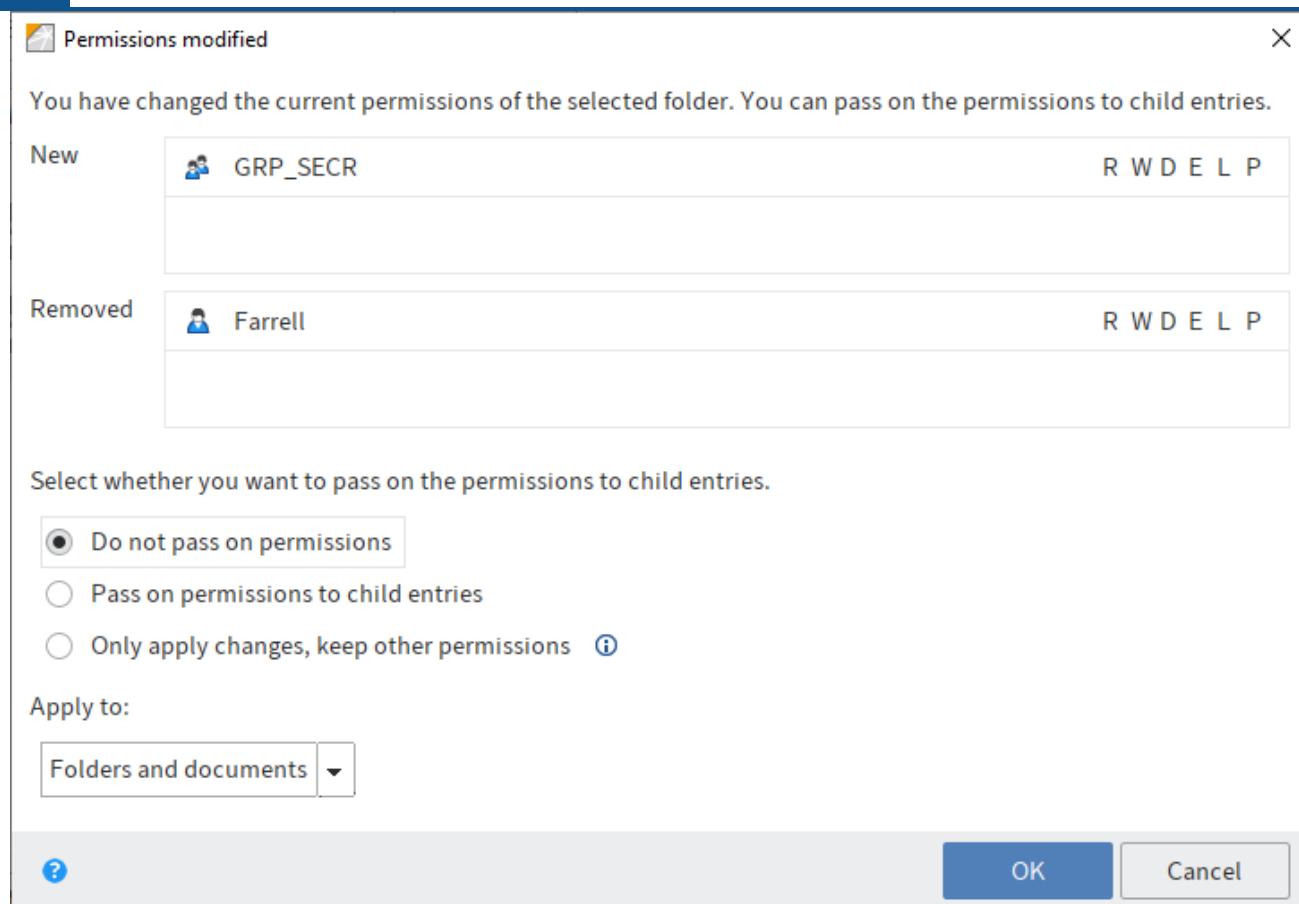


Example

The head of HR wants to grant a head of department access to an application created in the HR workspace. The head of department needs to be able to read the application and edit the metadata. The head of HR can add the head of department on the *Permissions* tab and assign him the *R* and *W* permissions.

Outlook

If you change the permissions of a folder in the *Metadata* dialog box, the new permissions can be passed on to the child entries (child folders and documents). After you have changed the permissions, the *Permissions changed* dialog box opens. Specify what effects this change should have.



Please note

The changes do not affect references, since they retain the permission settings of the original entry.

Choose from the following options:

Do not pass on permissions: The changes are not applied to the documents and child folders in the folders.

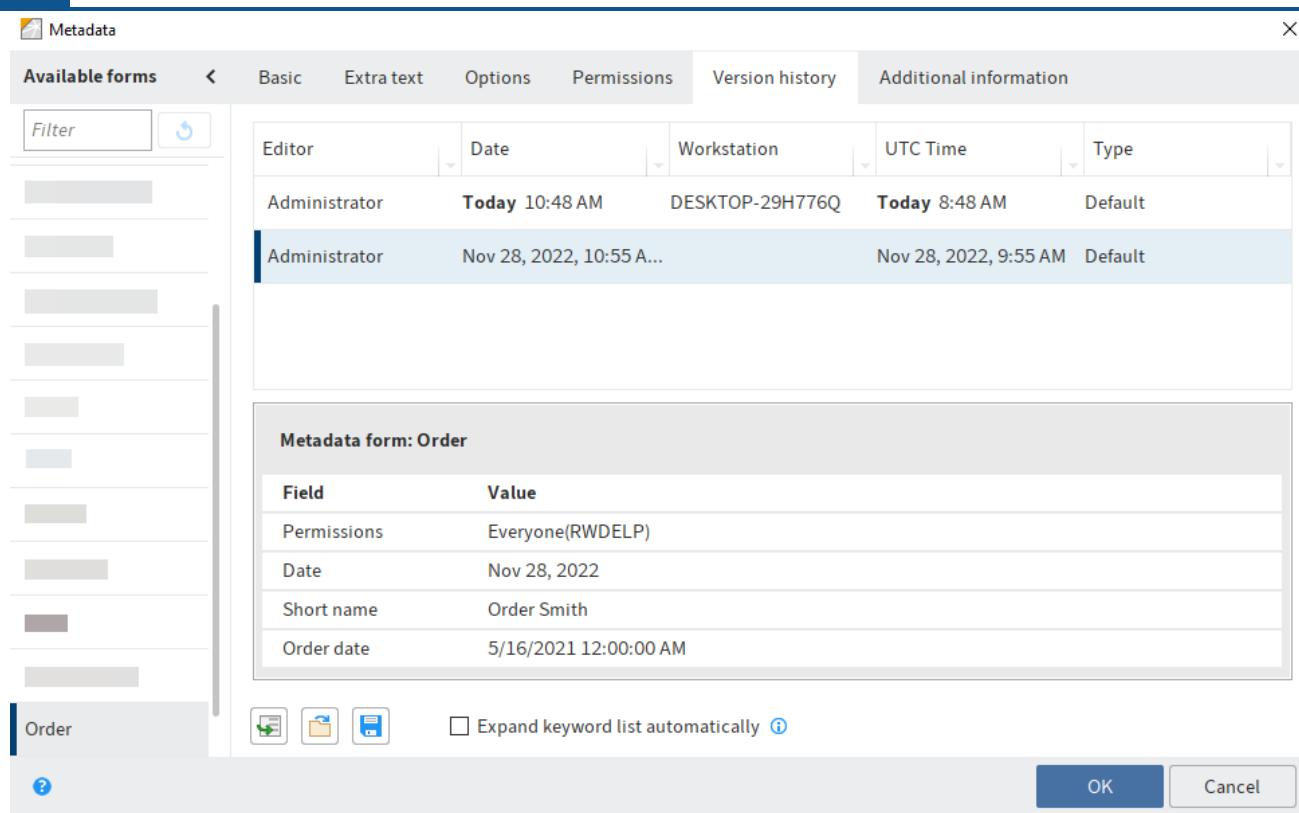
Pass on permissions to child entries: All permissions are passed on to the entries in the folder.

Only apply changes, keep other permissions: Only permissions are passed on that result in changes to permissions for the documents and child folders in the folder.

Apply to: Using the drop-down menu, select whether to apply the changes to all child entries or only folders/documents.

'Version history' tab

With version-controlled documents, changes to the metadata are documented. You will find this documentation on the *Version history* tab.



The version history contains two panes:

In the top part, you can see which users made changes and when.

The changes that the selected user made are shown in the lower part.

'Additional information' tab

Information

This tab is only displayed if you have been granted authorization by an administrator.

The *Additional information* tab provides additional fields in the database (map fields). These fields can be used for scripts, workflows, and other purposes.

Identify personal data

The *Options* tab in the *Metadata* dialog box contains three fields that allow you to find entries with personal data and delete them in due time.

Personal identifier: If the entry contains a personal identifier, enter information that enables you to identify the relevant person in this field. This term is intended to help you find the entry using the metadata search. For this reason, you need a company-wide system for assigning these terms. This will help you find entries containing a user's personal data. You can also search all entries containing personal data – regardless of the individual.

End of deletion period: Enter the date on which the entry must be deleted at the latest. This date must come after the date you have entered under *End of retention period*. You can select a date by clicking the calendar icon in the field.

Please note

If you do not complete the *Personal identifier* and *End of deletion period* fields, a dialog box will appear indicating that a personal identifier has not been specified. You can disable this dialog box under *Ribbon > User menu [your name] > Configuration > Dialog boxes*.

End of retention period: Enter the date up to which the entry has to be retained. The entry cannot be deleted before the entered date. You can select a date by clicking the calendar icon in the field.

Please note

The retention period must end before the deletion period.

Information

You can set a retention period in the ELO Administration Console. If an entry is filed with the corresponding metadata form, the field *End of retention period* is completed automatically.

Delete entries with personal data

The purpose of marking entries with personal data is to be able to delete the corresponding entries in accordance with legal requirements. You can delete entries with personal data in the following ways:

- In the search
- With the *Delete expired documents* function

Method using the search

1. To delete entries with personal data, first perform a search. You can narrow down your search based on the *End of deletion period* or *End of retention period* fields.
2. In the search results, select the entries that have to be deleted. To select multiple entries, press the CTRL key and click all the entries you want to select. If you want to select all entries or all entries you want to select are in a row, press the SHIFT key then click the top-most and bottom-most entry you want to select.
3. Once you have marked the entry or entries in the search results, click *Organize > Delete* on the ribbon. Click *Delete in ELO* in the selection dialog box.

Result

The entries can no longer be seen in the *Repository* work area.

Important

The entries are not deleted permanently, just marked as deleted. This marker signals the administrator to remove the documents from ELO permanently. You can find more information under [Show deleted entries](#) and [Delete permanently](#).

Method using the 'Delete expired documents' function

Please note

The function *Delete expired documents* not only deletes entries containing personal identifiers, but all entries whose retention period has passed.

1. On the ribbon, click *Organize > System > Delete expired documents*.
The *Delete expired documents* dialog box appears.
2. Specify whether you want to delete *Documents only* or *Documents and folders* with expired retention periods.

Result

The entries can no longer be seen in the *Repository* work area.

Important

The entries are not deleted permanently, just marked as deleted. This marker signals the administrator to remove the documents from ELO permanently. You can find more information under [Show deleted entries](#) and [Delete permanently](#).

Enter metadata with ELO Click OCR

The integrated text recognition feature can be used as a tool for entering metadata. ELO Click OCR transfers text from a document into the metadata form. This prevents users from making manual data entry errors. The following example explains how to proceed.

Click OCR can be used in all work areas. In this example, we demonstrate how the function works in the *Intray* work area.

Information

An OCR service needs to be installed for ELO Click OCR to work.

Method

1. Open the *Intray* work area.
2. Click the document that you want to edit the metadata of.

The document appears in the viewer pane.

3. On the ribbon, click *File > Metadata*.

The *Metadata* dialog box opens.

4. Select the desired metadata form.

5. Click the field you want to apply the metadata to.

The cursor blinks in the selected field.



6. Move the mouse pointer to the part of the document (preview) containing the information you require.

Information

If ELO Click OCR recognizes a text element (word or number), the element that has been found is highlighted in yellow and a tooltip with the recognized text appears.

7. Click the text you want to transfer to the metadata form.

Information

If you want to transfer multiple terms after another, select each individual term while holding the SHIFT button. Release the mouse button after each term. Repeat the process until you have transferred all desired terms.

Result

The recognized text information is transferred to the selected field.

Permissions

Available in: *Ribbon > Organize > Properties*

This function opens the *Permissions* tab in the *Metadata* dialog box. This is where you set the permissions of a folder or a document. You will find more information under [Metadata](#).

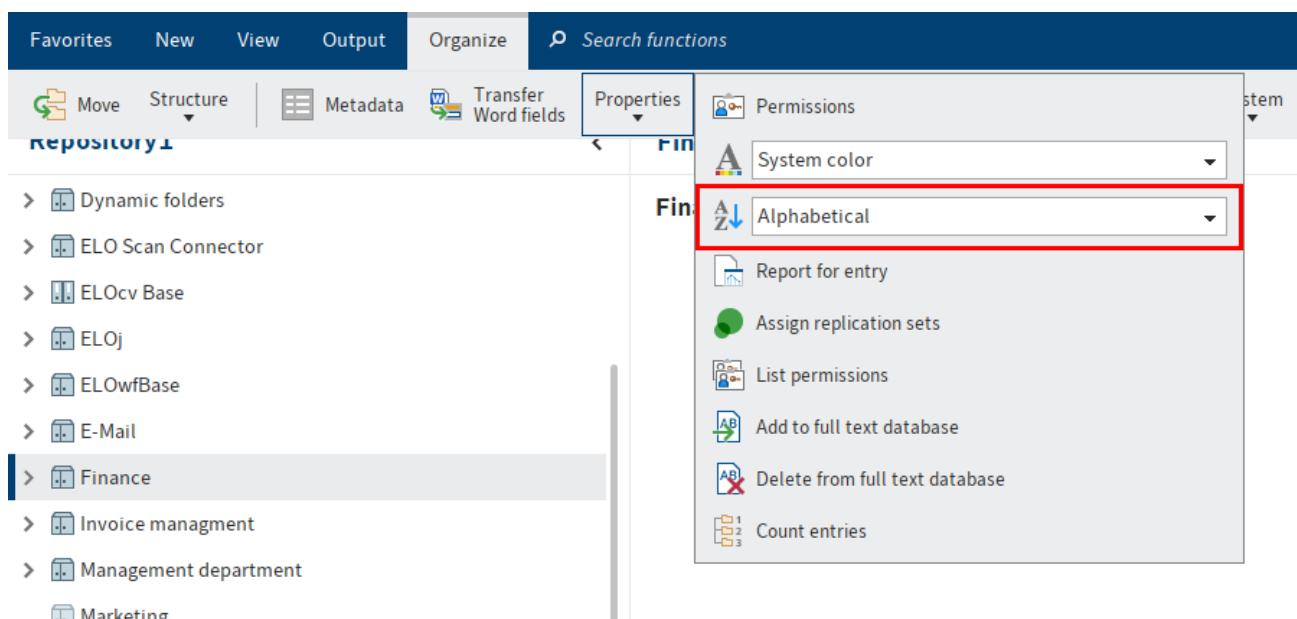
Font color

Available in: *Ribbon > Organize > Properties*

Use this function to change the font color of a selected document or folder.

Sort order

Available in: *Repository work area > Ribbon > Organize > Properties*



Use this function to change the sort order within a selected folder. You can choose between different sort orders in a drop-down menu:

Sort manually

If you select the option *Manual*, you can sort the child entries in the folders later on.

1. Select a view profile that includes the *Content* view element.
2. Click the folder that you want to sort manually.

Optional: If you have not already done so, open the *Content* view element.

3. In the *Content* view element, click the entry (folder or document) that you want to move.
4. Drag and drop the entry to the selected location.

The sort order is changed.

Information

You will find other options for sorting entries in the list and tile view on the toolbar.

Report for entry

Available in: *Ribbon > Organize > Properties*

Use this function to open an overview with information on the currently selected entry. Use the *Configure report* dialog box to specify which information to include in the overview. For example, you can define which actions will be reported or which period the report should refer to.

Choose from the following options:

Number of entries: Specify the maximum number of entries the report should contain.

Date: Enter the period which you want to create the report for.

User: With the *User* field, you can search for users and groups. As soon as you start typing, a drop-down menu with possible matches appears. Select the user/group for the report.

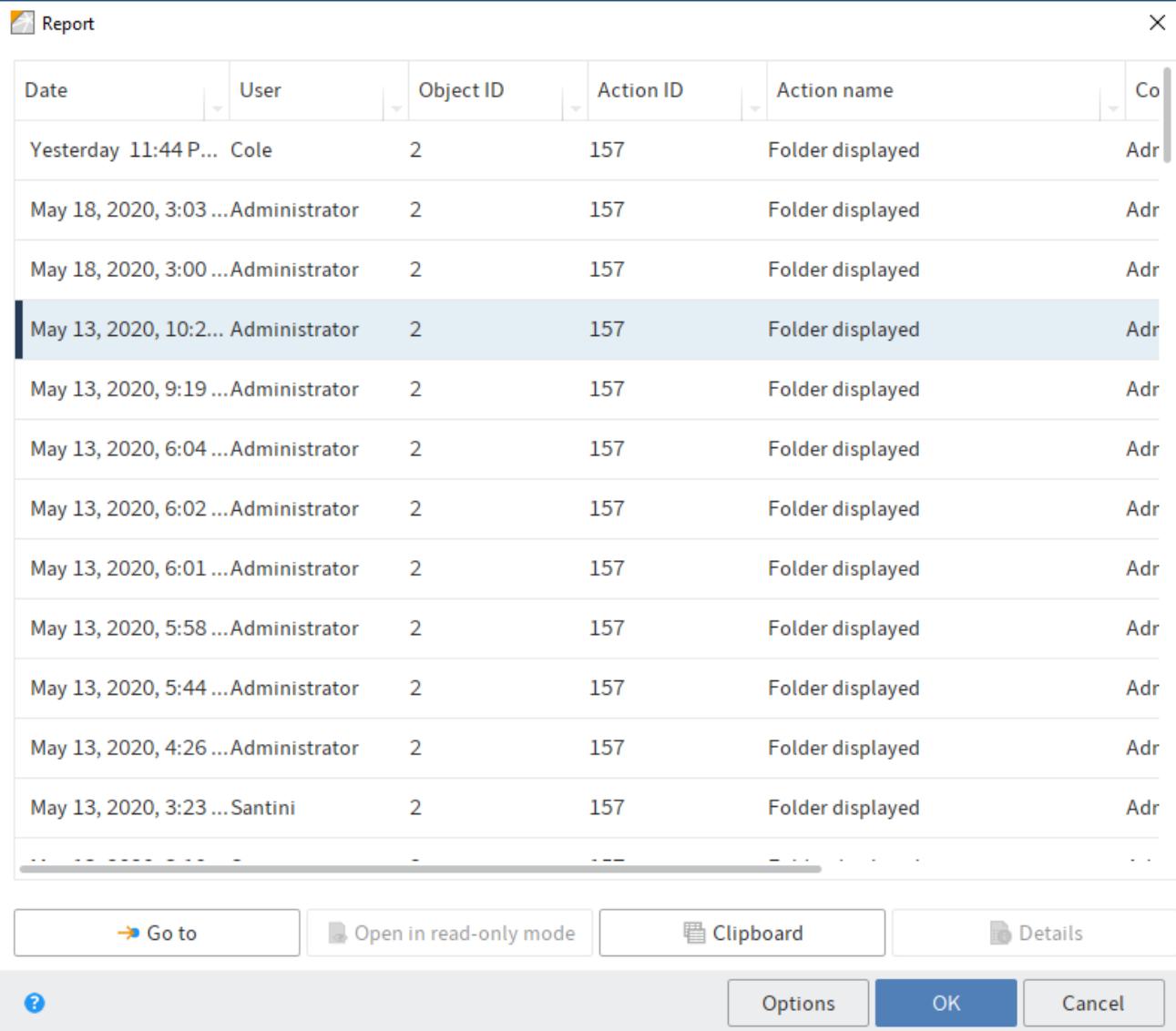
Actions: Select the actions you want to be recorded in the report.

Select all: Select all actions via the *Select all* button.

Select none: Click *Select none* to disable all actions.

OK: Click *OK* to create the report with the new settings.

The *Report* dialog box opens.

A screenshot of a "Report" dialog box. The title bar says "Report". The main area is a table with columns: Date, User, Object ID, Action ID, Action name, and Co. The table lists several entries, mostly from May 13, 2020, showing actions like "Folder displayed" performed by users Cole and Administrator. The last row shows three ellipses (...). At the bottom are buttons: "Go to", "Open in read-only mode", "Clipboard", "Details", "?", "Options", "OK", and "Cancel".

Date	User	Object ID	Action ID	Action name	Co
Yesterday 11:44 P...	Cole	2	157	Folder displayed	Adr
May 18, 2020, 3:03 ...	Administrator	2	157	Folder displayed	Adr
May 18, 2020, 3:00 ...	Administrator	2	157	Folder displayed	Adr
May 13, 2020, 10:2...	Administrator	2	157	Folder displayed	Adr
May 13, 2020, 9:19 ...	Administrator	2	157	Folder displayed	Adr
May 13, 2020, 6:04 ...	Administrator	2	157	Folder displayed	Adr
May 13, 2020, 6:02 ...	Administrator	2	157	Folder displayed	Adr
May 13, 2020, 6:01 ...	Administrator	2	157	Folder displayed	Adr
May 13, 2020, 5:58 ...	Administrator	2	157	Folder displayed	Adr
May 13, 2020, 5:44 ...	Administrator	2	157	Folder displayed	Adr
May 13, 2020, 4:26 ...	Administrator	2	157	Folder displayed	Adr
May 13, 2020, 3:23 ...	Santini	2	157	Folder displayed	Adr
...		-	-	-	-

This dialog box contains an overview of the actions that were executed for an entry. The name of the executed action is displayed in the *Action name* column. You will also see what action was performed by whom and when.

Go to: The *Go to* button takes you straight to the respective entry.

Open in read-only mode: Click *Open in read-only mode* to open the respective document in an external application.

Clipboard: Use the *Clipboard* button to copy a selected area in the *Report* dialog box to the clipboard. This allows you to save parts of the report in an external document, for example.

Details: Click the *Details* button to open the *Details of* dialog box. The *Details of* dialog box lists the permissions and group membership of the user who has triggered the respective report entry.

Information

The *Details of* dialog box is only available for report entries with the action name *Indexserver: Logon* or the action ID 501. This action is only evaluated when you execute a report for the top repository level and the report settings (*Open ELO* action) have been configured accordingly.

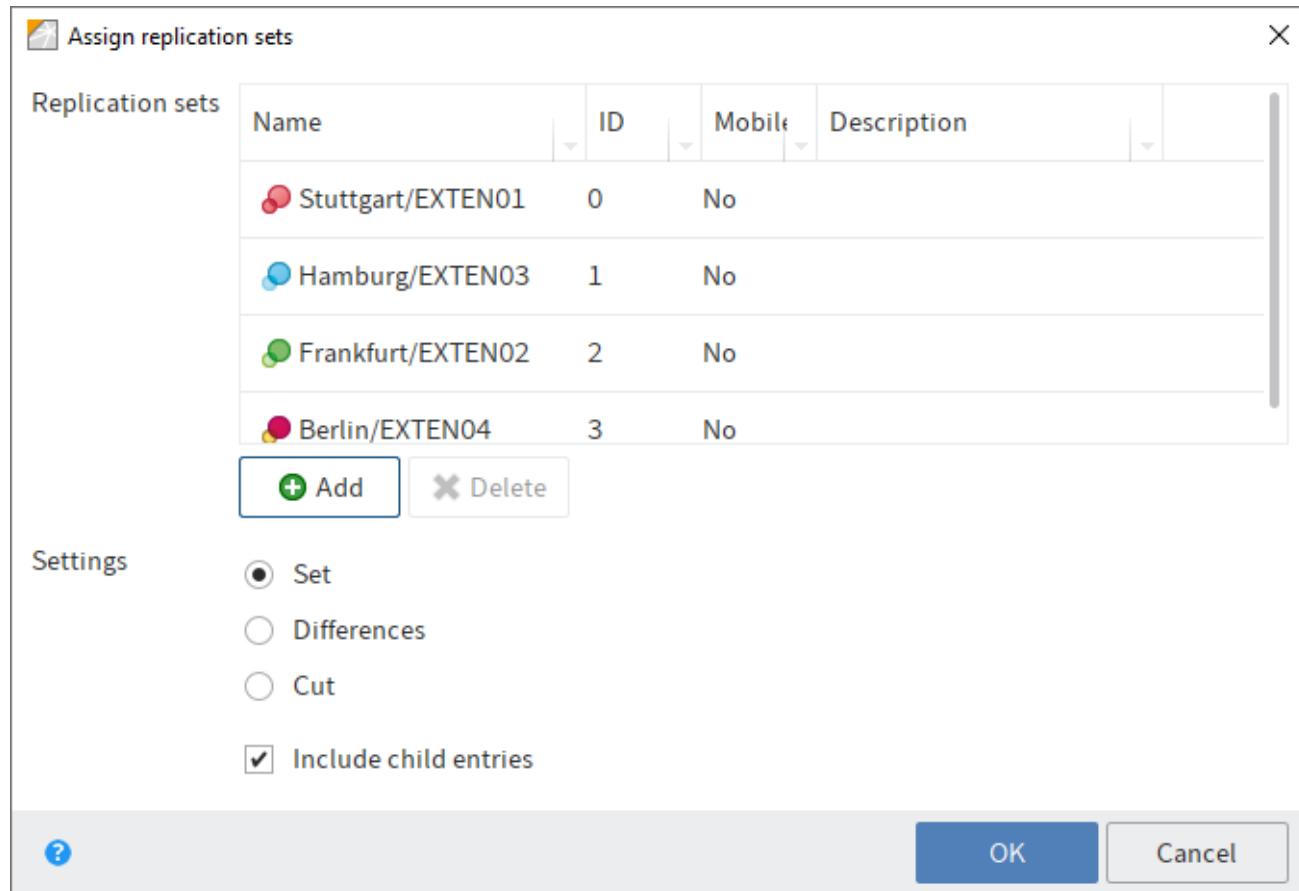
Options: Use the *Options* button to get to the *Configure report* dialog box. Make the changes for the report in the *Configure report* dialog box.

Assign replication sets

Available in: *Ribbon > Organize > Properties*

The replication set is a characteristic that you assign to individual repositories in order to replicate them in another repository. Each replication set stands for one repository. Replication sets enable you to synchronize data between multiple locations. The replication sets must have already been mapped to the entries using the ELO Replication module.

You will find detailed information in the [ELO Replication](#) documentation.



In the *Replication sets* field, you can see which replication sets have already been mapped to the entry. To add a new replication set, click *Add* and select a new replication set.

Please note

Replication sets are inherited upward to parent folders in the repository structure. To prevent inheritance, select the *Start point for replication* option in the *Metadata* dialog box of the folder you want to replicate.

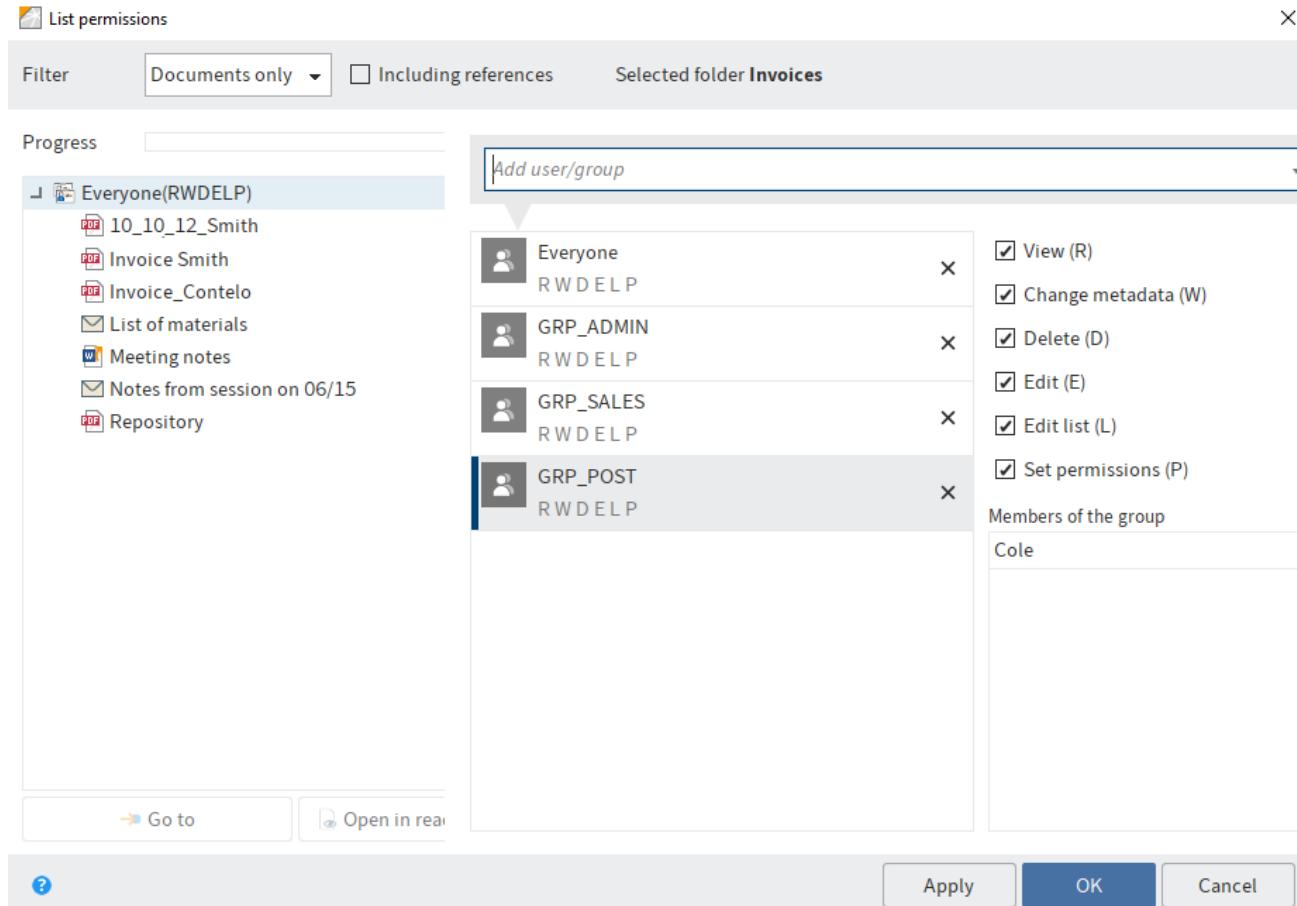
List permissions

Available in: *Repository work area > Ribbon > Organize > Properties*

The *List permissions* function enables you to view the permissions for each folder in ELO. This function helps administrators to quickly find information on the permission structures in the repository.

Information

The function is only available for folders. You will find information on the permissions of a document on the *Permissions* tab in the [Metadata](#) dialog box.



In this dialog box, you see the permissions for a selected folder including its child entries.

Filter: In the drop-down menu, select which child entries (*All entries*, *Folders only* or *Documents only*) you want to view the permissions of.

Including references: Select the option *Including references* if you also want to list permissions for references.

Selected folder: Shows the folder you selected.

Progress: While the system is searching for permissions for the selection you made, a green bar appears next to *Progress* to indicate the expected duration of the process.

The column below *Progress* lists the permission sets found in the selected folder. If you expand one of the sets (triangle symbol), you can see which child entries use this permissions set.

Go to: The *Go to* button takes you straight to the respective entry in ELO.

Open in read-only mode: Click *Open in read-only mode* to open the respective document in an external application.

Add user/group

Search for the desired user or group in the *Add user/group* field. Suggestions will appear as you type.

Click the corresponding suggestion to select a user or a group.

Alternative: If you click the triangle to the right of the *Add user/group* field, this will open a drop-down menu. The drop-down menu contains a list of the users and groups you selected recently.

In the middle column, you can see which users or groups have already been assigned permissions for the selected entry and which permission settings apply.

Edit permissions settings

To edit the permissions settings, select an entry in the middle column and select or clear individual permissions.

The following options are available:

- View (R): Users with *View* permissions have read access to the selected entry. These users can view the content of the entry.
- Change metadata (W): Users with *Change metadata* permissions can edit the metadata for the selected entry.
- Delete (D): Users with *Delete* permissions can delete the selected entry.
- Edit (E): Users with *Edit* permissions can edit the selected entry.
- Edit lists (L): This permission only applies to folders. Users with this permission can change the content of the respective folder. For example, they can create documents in this folder or move documents from the folder.
- Set permissions (P): A user with the right to *Set permissions* for an entry can change the permissions that other users have to this entry.

Information

Options that are not applicable are shown in italics and enclosed in pointy brackets.

Personal (orange user icon): Use the *Personal* button to grant yourself sole access to the respective entry. All other permissions will be revoked.

AND group: AND groups are useful if you only want to assign permissions to the users in a group that are also members of another group. To create an AND group, select two groups in the middle column and click *AND group*.

Members of the group

If you select a group, you will see the group members in the *Members of the group* column.

Double-click the corresponding user in the *Members of the group* column to select a member of a group.

Remove permissions

To remove all permissions from a user or group, click the X icon next to the selected user or group.

Apply: Click *Apply* to save the changes. The dialog box remains open.

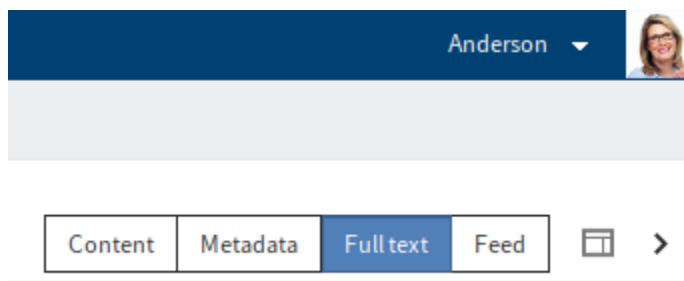
OK: Click *OK* to save changes and close the dialog box.

Cancel: Click *Cancel* to close the dialog box without saving the changes.

Add to full text database

Available in: *Ribbon > Organize > Properties*

Use this function to add the contents of a document to the full text database. The document must contain full text information. The full text information is written to the full text database and will be used when searching for documents.



You can view the document content in full text mode in the viewer pane. This enables you to search the text for specific terms.

Delete from full text database

Available in: *Repository work area > Ribbon > Organize > Properties*

Use this function to remove a document including its text contents from the full text database. This means that you cannot find the document with the full text search. This function is also available even if the selected document does not contain any full text information.

Count entries

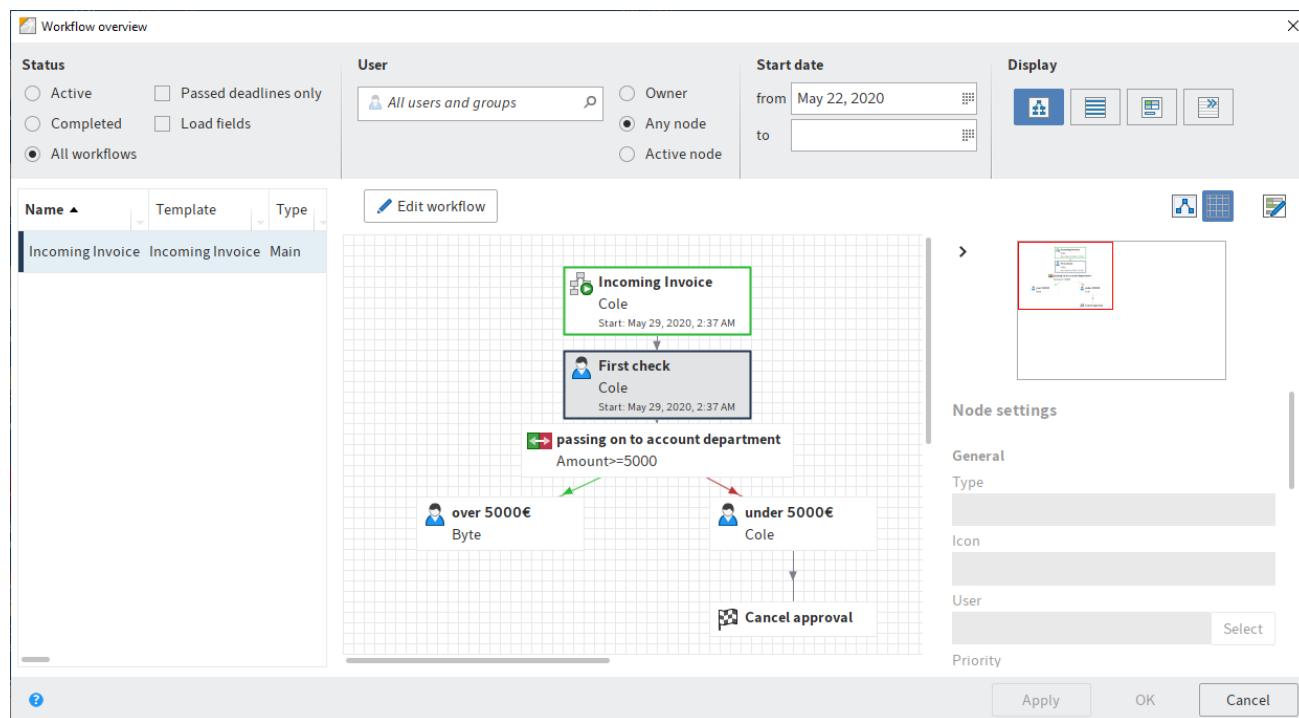
Available in: *Ribbon > Organize > Properties*

Use this function to count entries in the currently selected folder. You can also see the amount of memory that the entries in the selected folder are using.

You can specify which entries you want to count. In addition, you can save the result as a PDF.

Workflows for this entry

Use this function to open an overview with all workflows that exist for this entry. You can adjust the settings for viewing workflows.



Information

Hold down the left mouse button to adjust the size of the viewing panes. Drag the splitter bar at the right-hand corner of each window.

The workflows are listed as a table on the left-hand side. The selected workflow is shown as a diagram on the right-hand side. The status of the respective node is indicated by the colors in the diagram.

- Green: Node completed successfully
-

- Blue: Current node
- Red: Escalated node
- Gray: Future node

Status

Select which workflows you want to view.

Information

You will only see workflows that you have permissions for.

Choose from the following options:

- Active: If this option is selected, you will only see active workflows.
- Completed: If this option is selected, you will only see workflows that are completed.
- All workflows: If this is selected, all workflows will be displayed.
- Passed deadlines only: If this option is selected, you will only see escalated workflows. This option can be selected in combination with *Active*, *Completed*, or *All workflows*.
- Load fields: If this option is enabled, the available metadata is shown in the drop-down menu under the columns with the title *Index*. This option can be selected in combination with *Active*, *Completed*, or *All workflows*. This option can also be combined with the *Passed deadlines only* option.

Please note

The *Load fields* option can increase loading times.

Users

To filter the view, search for a user or group in the *All users and groups* search field. Suggestions will appear as you type. Select the desired user or group.

To cancel the selection, click the X icon next to the selected user or group.

Once you have selected a user/group, you can narrow down the list by selecting additional filter options:

- Owner: If this option is enabled, you only see workflows that the selected user/group is the owner of. The owner is the user who started the workflow.
- Any node: If this option is enabled, you only see workflows in which the selected user/group is entered as the editor of at least one node.
- Active node: If this option is enabled, you only see workflows in which the selected user/group is entered as the editor of the node.

Start date

from/to: Define how long you want the workflow to show up in the overview. The start date of the workflow must be within this period.

Display mode

Choose from the following options:

- Diagram view: If you select this option, the drop-down menu and the diagram for the selected workflow are displayed.
- List view: If you select this option, the drop-down menu and a detailed overview of the selected workflow are displayed.
- Form view: Select this option to view the drop-down menu and the workflow form for the selected workflow. The workflow form must be specified in the start node.
- No details: If this option is enabled, only the drop-down menu is displayed.

Apply: Click *Apply* to save the changes. The dialog box remains open.

OK: Click *OK* to save changes and close the dialog box.

Cancel: Click *Cancel* to close the dialog box without saving the changes.

You will find more information on the topic of *workflows* in the [ELO workflow](#) documentation.

Reminders for entry

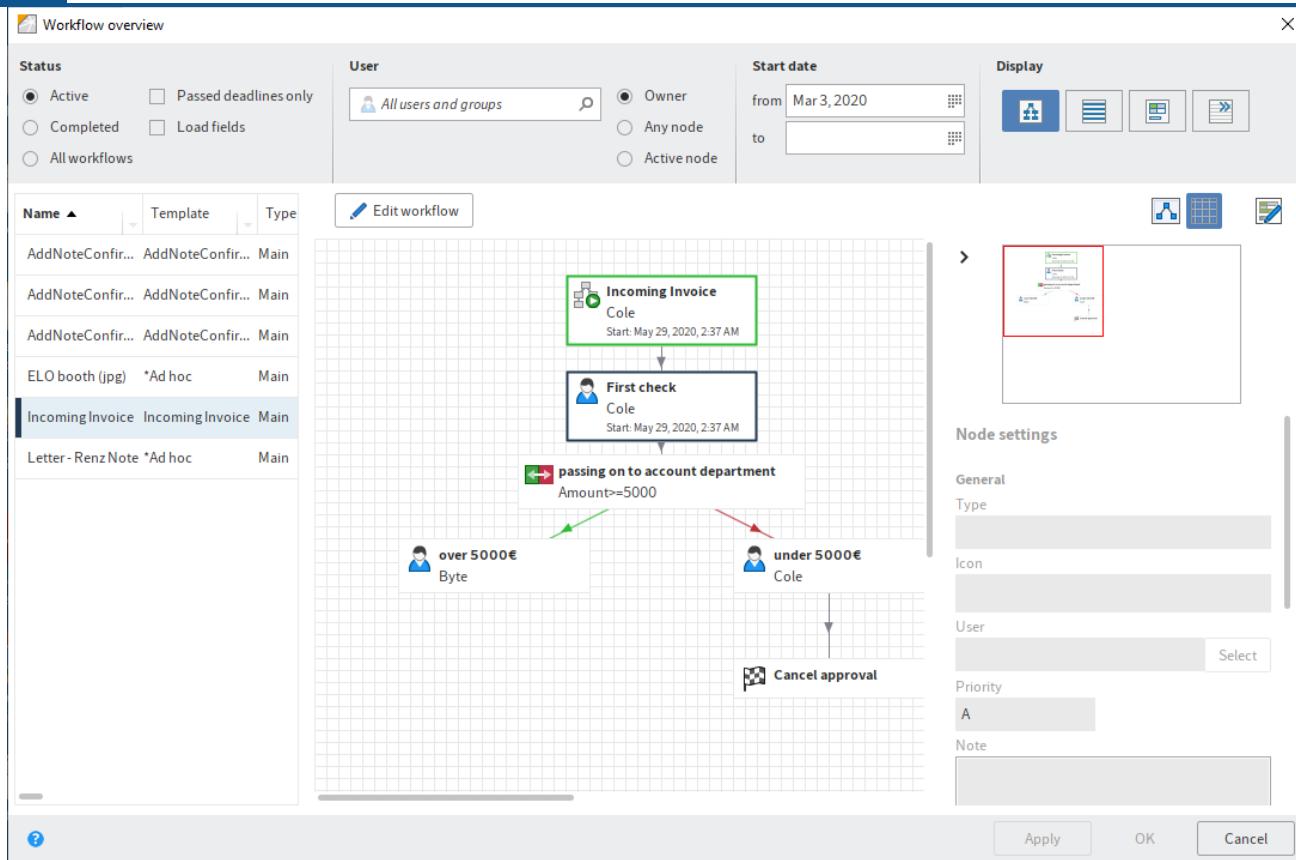
Available in: *Ribbon > Organize > Overviews*

Use the *Reminders for entry* function to open an overview of the reminders that have been created for this entry.

You will find more information on creating reminders here: [Create reminder](#).

Workflow overview

Available in: *Ribbon > Organize > Overviews*



This dialog box contains an overview of all existing workflows. To view the details of a workflow, select the corresponding workflow from the list on the left.

Information

Hold down the left mouse button to adjust the size of the viewing panes. Drag the splitter bar at the right-hand corner of each window.

The workflows are listed as a table on the left-hand side. The selected workflow is shown as a diagram on the right-hand side. The status of the respective node is indicated by the colors in the diagram.

- Green: Node completed successfully
- Blue: Current node
- Red: Escalated node
- Gray: Future node

Status

Select which workflows you want to view.

Information

You will only see workflows that you have permissions for.

Choose from the following options:

- Active: If this option is selected, you will only see active workflows.
- Completed: If this option is selected, you will only see workflows that are completed.
- All workflows: If this is selected, all workflows will be displayed.
- Passed deadlines only: If this option is selected, you will only see escalated workflows. This option can be selected in combination with *Active*, *Completed*, or *All workflows*.
- Load fields: If this option is enabled, the available metadata is shown in the drop-down menu under the columns with the title *Index*. This option can be selected in combination with *Active*, *Completed*, or *All workflows*. This option can also be combined with the *Passed deadlines only* option.

Please note

The *Load fields* option can increase loading times.

Users

To filter the view, search for a user or group in the *All users and groups* search field. Suggestions will appear as you type. Select the desired user or group.

To cancel the selection, click the X icon next to the selected user or group.

Once you have selected a user/group, you can narrow down the list by selecting additional filter options:

- Owner: If this option is enabled, you only see workflows that the selected user/group is the owner of. The owner is the user who started the workflow.
- Any node: If this option is enabled, you only see workflows in which the selected user/group is entered as the editor of at least one node.
- Active node: If this option is enabled, you only see workflows in which the selected user/group is entered as the editor of the node.

Start date (from/to)

Define how long you want the workflow to show up in the overview. The start date of the workflow must be within this period.

Display mode

Choose an option for displaying the workflows.

Choose from the following options:

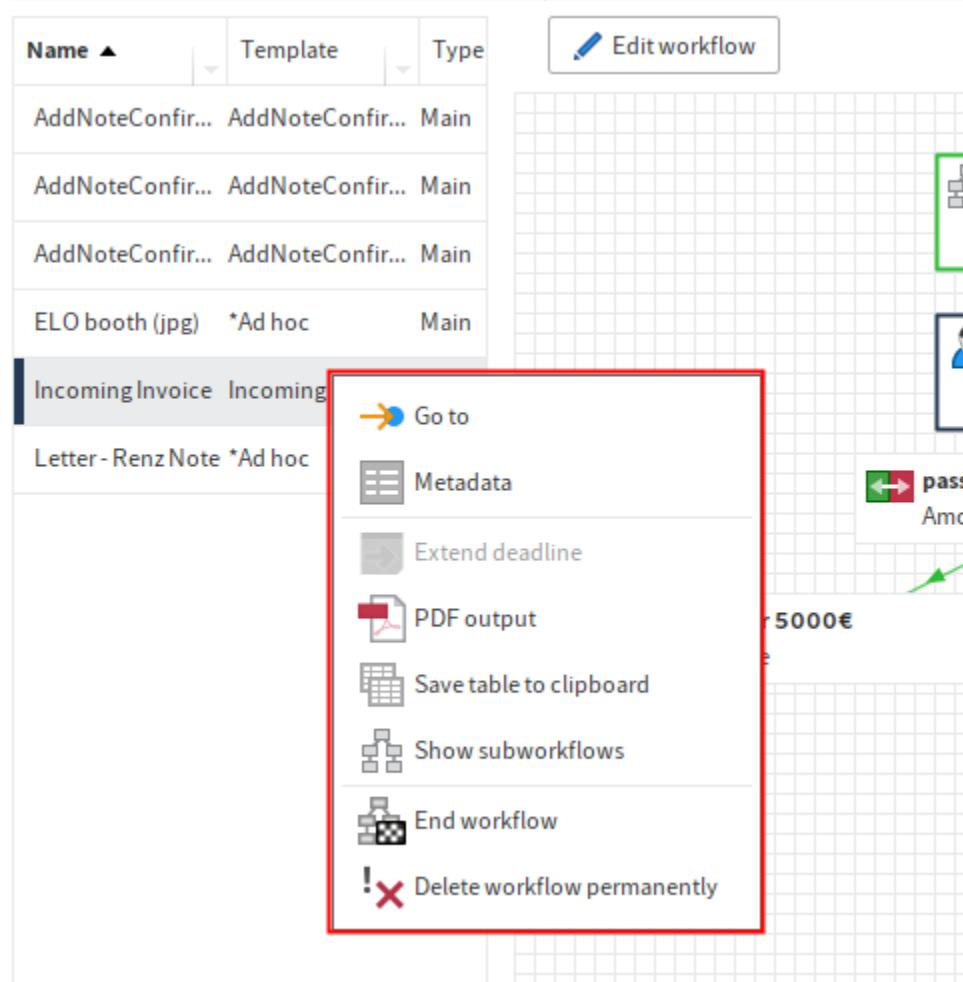
-

Diagram view: If you select this option, the drop-down menu and the diagram for the selected workflow are displayed.

- List view: If you select this option, the drop-down menu and a detailed overview of the selected workflow are displayed.
- Form view: Select this option to view the drop-down menu and the workflow form for the selected workflow. The workflow form must be specified in the start node.
- No details: If this option is enabled, only the drop-down menu is displayed.

Context menu

Some functions can only be called from the context menu. Right-click the list to open the context menu.



Go to: The *Go to* button takes you straight to the respective entry in the *Repository* work area.

Metadata: The *Metadata* menu item opens the metadata of the respective entry.

Extend deadline: You can edit the workflow deadline with the *Extend deadline* menu item.

PDF output: Click the *PDF output* menu item to save the workflow as a PDF outside of ELO.

Save table to clipboard: If you click the *Save table to clipboard* menu item, the data for the selected workflow is copied to your Windows Clipboard. From here, you can transfer the data to an external program.

Show subworkflows: The *Show subworkflows* menu item opens a dialog box that shows you the subworkflows associated with the selected workflow.

End workflow: You can stop the selected workflow with the *End workflow* menu item. If you do so, you can no longer edit the workflow.

Delete workflow permanently: Click *Delete workflow permanently* to remove the selected workflow from the system. You will be asked to confirm that you really want to delete the workflow.

Important

Permanently deleted workflows cannot be restored.

General buttons

Apply: Click *Apply* to save the changes. The dialog box remains open.

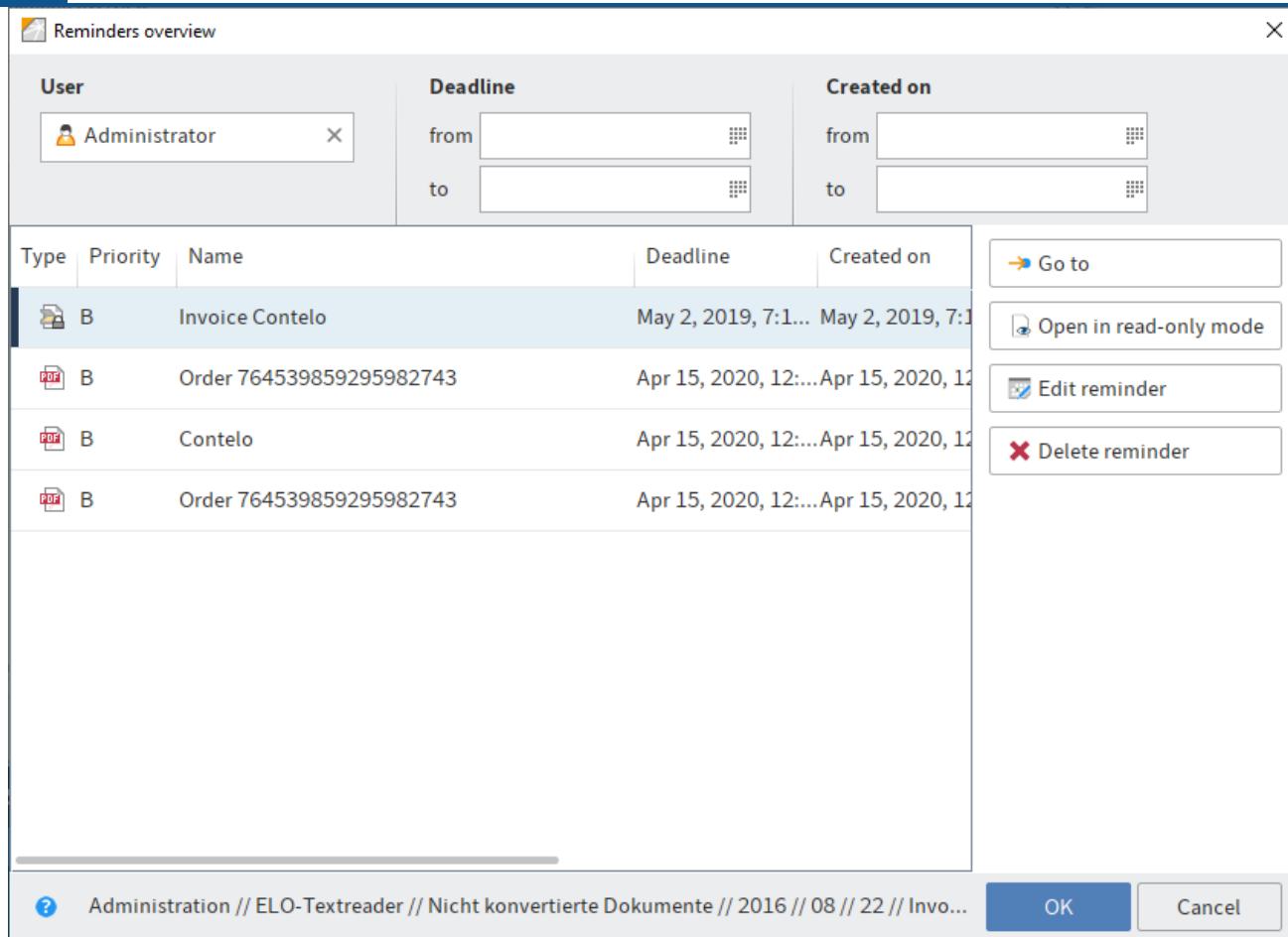
OK: Click *OK* to save changes and close the dialog box.

Cancel: Click *Cancel* to close the dialog box without saving the changes.

You will find more information on the topic of *workflows* in the [ELO workflow](#) documentation.

Reminders overview

Available in: *Ribbon > Organize > Overviews*



This dialog box contains an overview of your reminders. You can view and edit the reminders here. You can learn how to create reminders here: [Create reminder](#).

Deadline

Under *Deadline*, you can filter the overview by the date of the reminder.

from: Use the *from* field to set the start date of the period that should apply for the filter.

to: Set the end date of the period that should apply for the filter in the *to* field.

Created on

Under *Created on*, you can filter the overview by the date the reminder was created on.

from: Use the *from* field to set the start date of the period that should apply for the filter.

to: Set the end date of the period that should apply for the filter in the *to* field.

Functions

Once you have selected a reminder, the following functions are available:

Go to: The *Go to* button takes you straight to the entry in the *Repository* work area that is linked to the reminder.

Open in read-only mode: Click *Open in read-only mode* to open the respective document in an external application.

Edit reminder: Click the *Edit reminder* button to change the reminder.

Delete reminder: Use the *Delete reminder* button to mark the selected reminder for deletion. The reminder will be marked red. As soon as you click *OK* and the dialog box closes, all reminders that have been marked for deletion will be removed. If you click *Cancel* or click *Delete reminder* again, the delete action will be reversed.

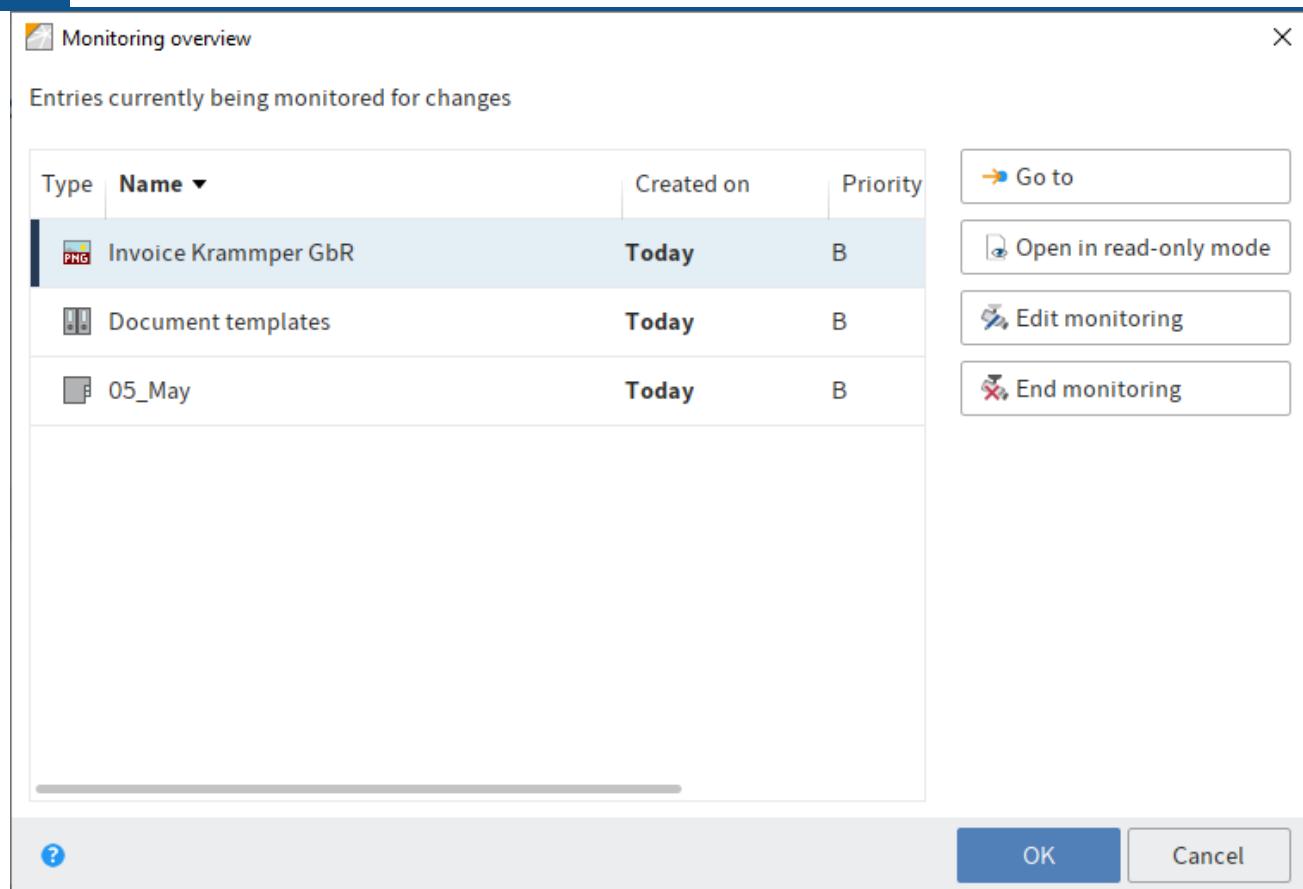
Monitoring overview

Available in: *Ribbon > Organize > Overviews*

This function opens an overview of the entries you are currently monitoring. You can show the filing location, open the entries in read-only mode, edit the monitoring settings, or end monitoring actions.

You see when monitoring began on an entry and which priority level it has. If there are changes to an entry that is being monitored, you will receive a notification in your Tasks work area.

To start monitoring on an entry, use the *Monitor changes* function (available in: *Ribbon > New > Create task*).



The following functions are available in the *Monitoring overview* dialog box:

Go to: Opens the filing location of the selected entry.

Open in read-only mode: Click *Open in read-only mode* to open the respective document in an external application.

Edit monitoring: This opens the *Edit monitoring* dialog box. In this dialog box, you can change the name, priority level, and notification settings of a monitoring action that appears in your tasks area.

End monitoring: Click the *End monitoring* button to end monitoring of the current entry. The entry being monitored is initially marked red. When you click *OK*, the dialog box closes and the entry is no longer monitored. If you close the dialog box with the *Cancel* button, the delete action is reversed.

Delete

Keyboard shortcut: CTRL + DEL

This function enables you to delete

- entries in the *Repository* work area

Warning

The entries (folders or documents) are not deleted permanently. They are hidden and marked for deletion. This marker signals the administrator to remove the documents from ELO permanently. To delete entries permanently, use the functions [Show deleted entries](#) and [Delete permanently](#). They can be [restored](#) until the point at which they are permanently deleted.

- workflows, monitoring actions, and reminders in the *Tasks* work area

Only the task is deleted. The corresponding entry remains in the repository.

Please note

Documents in the Intray that have not yet been filed to ELO are permanently deleted with the *Delete* function.

Outlook

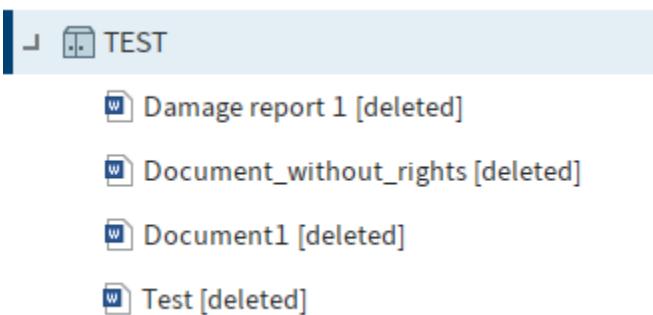
The function [Delete expired documents](#) enables you to delete entries whose retention period has passed. You can enter the retention period in the metadata when you file the entry.

Show deleted entries

Available in: *Ribbon > Organize > Delete*

Use this function to show deleted entries. Deleted entries are entries that have been removed with the *Delete* function and that have a deletion marker. Entries with a deletion marker are hidden in ELO.

If you show deleted entries, *[deleted]* is displayed after the name of the deleted entry. Use the [Restore](#) function to revert the deletion process and remove the deletion marker. Use the [Delete permanently](#) function to permanently erase deleted entries.

**Restore**

Available in: *Ribbon > Organize > Delete*

Use this function to remove the deletion marker from an entry in ELO. This allows you to undo the deletion of an entry. This option is only available if the entry has not been [deleted permanently](#).

To restore deleted entries, you must first show the entries again in ELO. Use the [Show deleted entries](#) function to do this. The entries are marked with *[deleted]* before the short name. Select an entry marked with *[deleted]* and click *Restore*. The deletion marker is removed.

If you restore a deleted folder, you can use the *Restore entries deleted on or after* option to define a date limit from which the documents included and deleted in the folder are restored.

Undo

Available in: *Ribbon > Organize > Delete*

Use this function to undo the last editing step. This function is only available for move, referencing, and delete actions, as well as for editing the metadata in the *Repository* and *Intray* work areas.

Remove lock

Available in: *Ribbon > Organize > Delete*

If a user has checked out an entry, it is locked and cannot be edited by other users. Use this function to remove the lock from a document or folder. Normal users can only remove their own locks. Administrators can also remove locks from documents set by other users.

Important

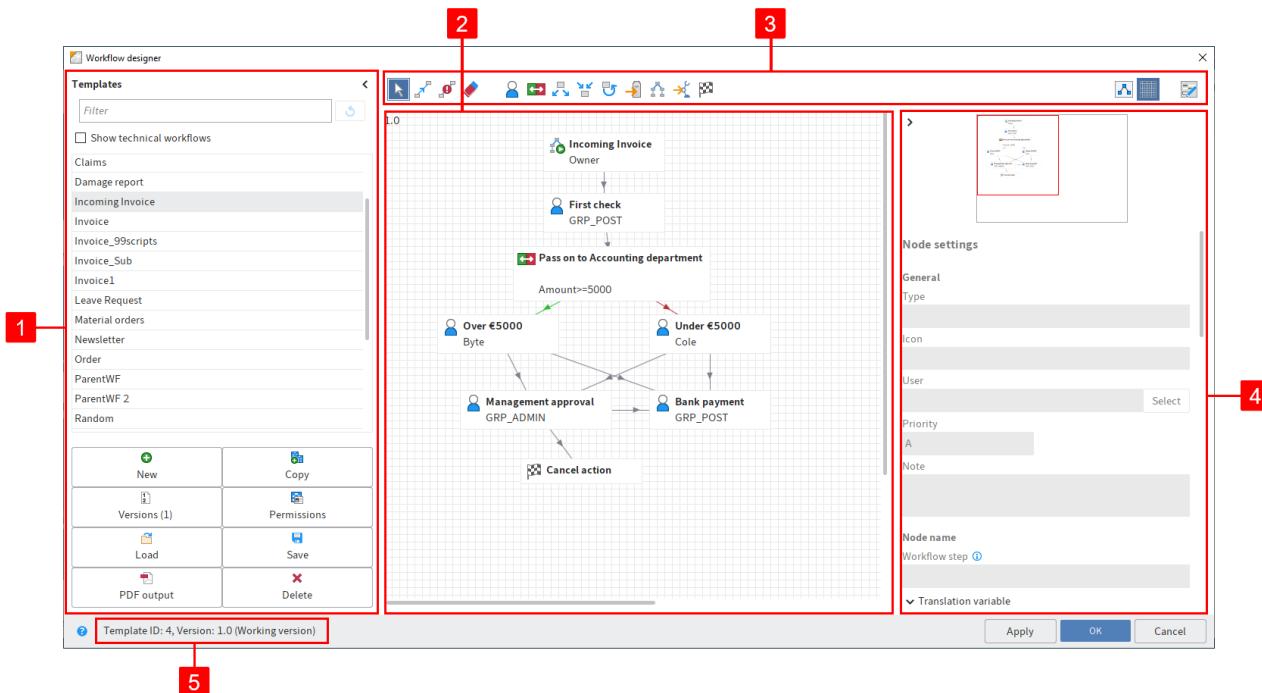
Removing a lock may lead to loss of data or changes being overwritten if the entry or metadata is being edited by another user. To unlock a document for all users, you should use the *Cancel editing* function in the *Check in* dialog box.

For more information on editing an entry, refer to the chapter *Edit entry*.

Workflow designer

Available in: *Ribbon > Organize > System*

Use this function to open the *Workflow designer*. The *Workflow designer* enables you to create and edit the templates for your workflows.



Select a template to open the template in the graphical view.

Information

Some tools are only available when you are in editing mode. Click *Edit workflow template* to enable editing mode.

The workflow designer consists of the following areas:

1 Templates: All available workflow templates are listed in the *Templates* column on the left-hand side. Click an entry to open the graphical interface. The workflow is displayed as a diagram in the middle of the dialog.

To show technical workflows, set a check mark in the check box.

Information

You can show or hide the *Templates* column using the double arrow icon.

The column also contains the following buttons for managing workflow templates:

- New: Create a new workflow template.
- Copy: Copy a workflow template selected in the *Templates* list. This applies the template settings.
- Versions: This is where you manage the versions of a workflow template.
- Permissions: This is where you make the permission settings for the workflow template.
- Load: Load an already created and saved workflow template.
-

Save: Save the workflow template externally.

- PDF output: Create a PDF overview of the workflow template.
- Delete: Delete the selected workflow template.

2 Workspace: In the workspace, the workflow templates are displayed in the graphic view. You can see the steps (nodes) and elements that a workflow consists of and how they are connected.

3 Toolbar: This is where you find the tools for creating and editing a workflow template.

4 Node editor: This area contains a preview window and the *Node settings* area. Define the settings for the individual workflow nodes in the *Node settings* area.

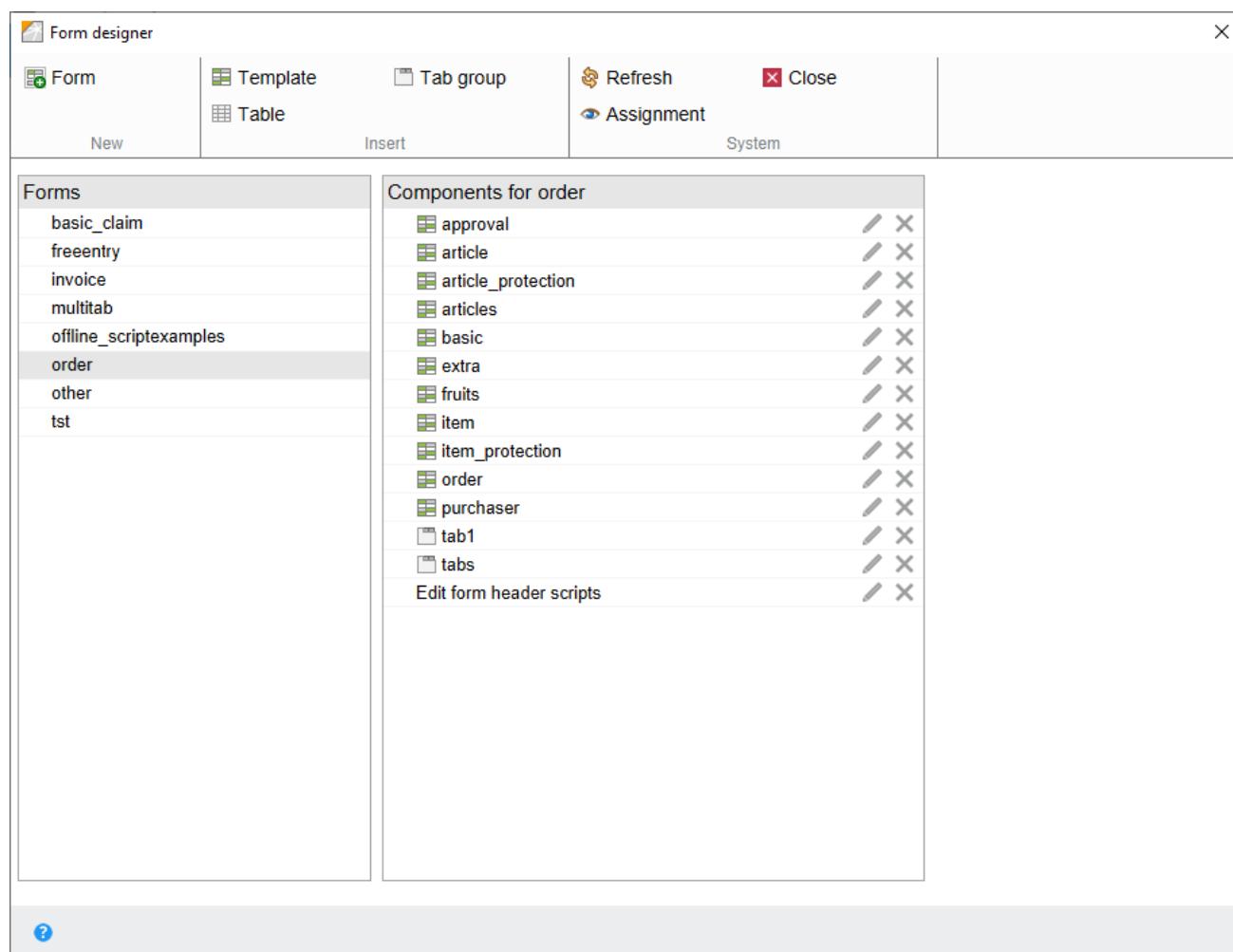
5 Status bar: This is where you find the ID of the workflow template, the current version, and the node ID of the currently selected workflow node.

Apply: Click *Apply* to save the changes. The dialog box remains open.

You will find more information on the topic of *workflows* in the [ELO workflow](#) documentation.

Form designer

Available in: *Ribbon > Organize > System*



Use the *Form designer* dialog box to design and manage ELO forms used in the form-based workflow. Different content and buttons appear depending on the selected function. The basic functions are explained in the following.

Toolbar

The toolbar is located in the top part of the dialog box. The tools differ depending on the selected function.

Form: Click the *Form* button to create a new form. A form can contain multiple templates.

Template: Use the *Template* button to create a new template for a form. Templates are the building blocks for forms. A form can consist of multiple templates and/or tables.

Tab group: Use this *Tab group* button to create a new tab group. Forms can be split into different tabs in tab groups. This makes it easier to structure large forms.

Table: Use the *Table* button to create a new table. Tables are a special type of template. With table templates, you have the option to record data in table form and save it to the database using special map fields.

Refresh: Refresh the form data with the *Refresh* button. This is necessary, for example, if you have loaded an image that you want to use in the form.

Close: Close the form designer with this button.

Assignment: Clicking the *Assignment* button opens a submenu. In this submenu, you can assign forms to individual metadata forms. These forms are displayed instead of the metadata preview if you select the corresponding option. You can edit the metadata via the form. If a form has not been assigned, ELO uses a default form.

Forms

You can find a list with all existing forms in the *Forms* area.

Components for

You can find all existing components of the selected form in the *Components for* area. Components are templates, tables, tab groups, and user scripts.

You will find more information on the topic of *workflows* in the [ELO workflow](#) documentation.

Translation table

Available in: *Ribbon > Organize > System*

Use this function to open the *Translation table* dialog box. The dialog box lists all terms used in ELO in a table.

You can enter a translation for each term in the displayed languages. Click the corresponding line.

If you run the client in another language, metadata fields are displayed in the corresponding language that a translation was entered in the table for.

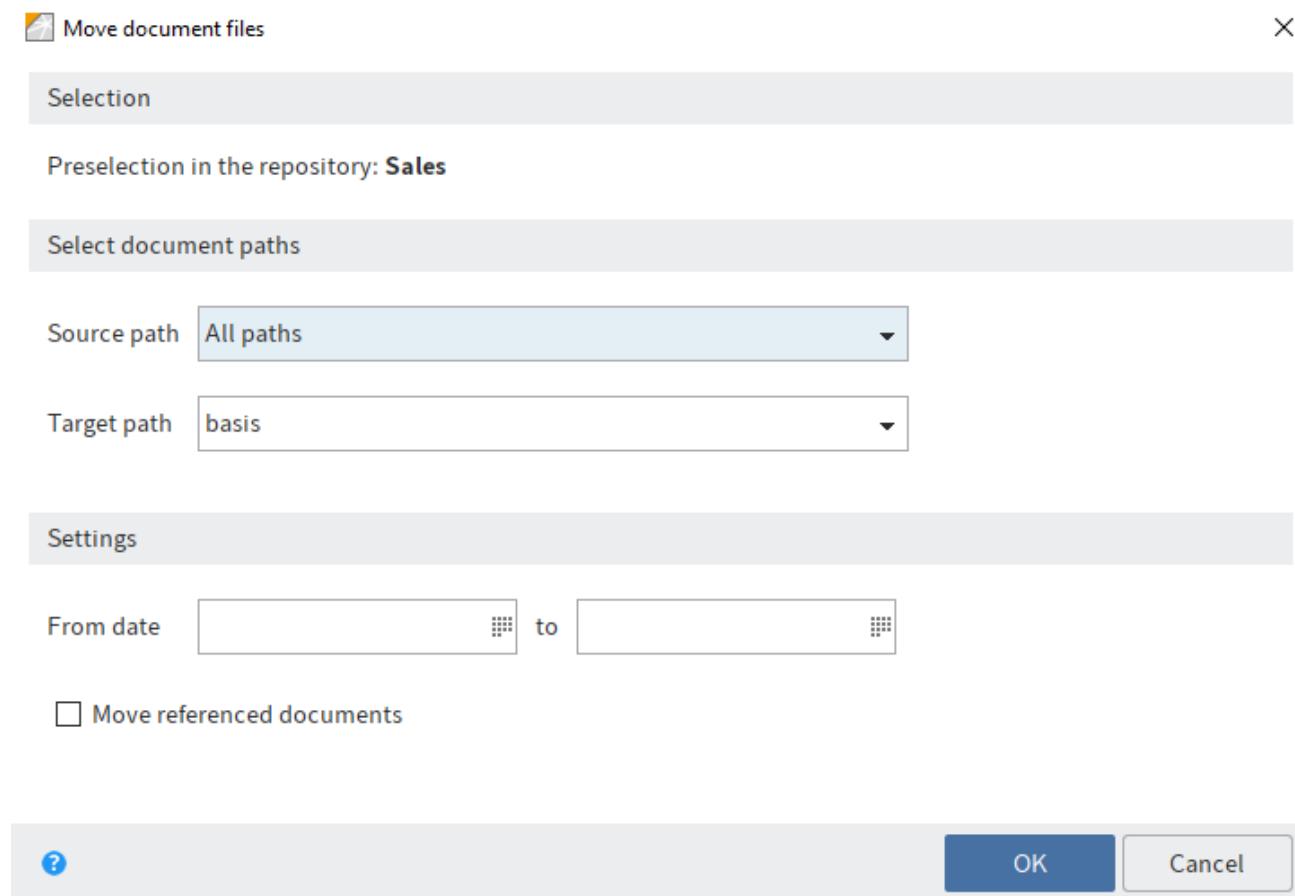
The basic settings provide columns for the system language (the language selected during the installation) as well as English (en) and French (fr).

You can add languages via the *context menu (right-click in column 'undefined')* > *Add language*. You can change the language via the *context menu (right-click in column with language)* > *Edit language*.

Move document files

Available in: *Ribbon > Organize > System*

Use the *Move document files* function to move files, file versions, attachments, and/or attachment versions to another medium (i. e. to a different document path). The repository structure remains the same.



Selection

Preselection in the repository: Indicates which folder was selected in the *Repository* work area.

Select document paths

Source path: Select the source path if you only want to move files from a specific path.

Target path: Define the target path. If the desired target path does not exist, it needs to be created in the ELO Administration Console.

Settings

From date: Enter the date on which you want to start moving files.

to: Enter the date on which you want to end moving files.

Move referenced documents as well: If the *Move referenced documents as well* option is enabled, documents for which references exist in ELO are also moved to another path.

OK: To move the document files, click *OK*.

Delete expired documents

Available in: *Ribbon > Organize > System*

Use this function to delete entries whose retention period has passed.

Warning

The entries (folders or documents) are not deleted permanently. They are hidden and marked for deletion. This marker signals the administrator to remove the documents from ELO permanently. To delete entries permanently, use the functions [Show deleted entries](#) and [Delete permanently](#). They can be [restored](#) until the point at which they are permanently deleted.

Information

You define the retention period in the metadata on the *Options* tab. Your administrator can set a retention period in the ELO Administration Console (*Metadata forms and fields > Entry options > Lifetime*).

Documents only: If you select this option, only documents whose retention period has passed are marked for deletion.

Documents and folders: If you select this option, documents and folders whose retention period has passed are marked for deletion.

OK: After clicking the *OK* button, the deletion markers are set according to the selected options.

Delete permanently

Available in: *Ribbon > Organize > System*

Important

This function permanently deletes entries with a [deletion marker](#) from ELO. Permanently removed entries cannot be restored. You should be aware that even a differentiated backup concept only offers a limited option for restoring deleted entries.

In the *Delete permanently* dialog box, you can specify which entries with a deletion marker you want to permanently remove from ELO.

Remove deleted entries: All deleted documents and folders are removed from ELO.

Remove deleted document versions and versions of the attachment: All deleted document versions and deleted attachment versions are permanently removed from ELO.

Deletion date until: Enter a date here. All entries that were deleted before the specified date are permanently removed from ELO.

'Document' tab

Open in read-only mode

Keyboard shortcut: CTRL + O

Use this function to open a document selected in ELO in an external program.

Check out and edit

Keyboard shortcut: ALT + O

Use this function to check out a document or folder for editing. The checked out entries are transferred to the *In use* work area and locked for other users. The editor is displayed in square brackets before the name of the entry in the *Repository* work area. To transfer checked out entries back to ELO, you must check the documents in.

For more information, refer to the chapter Edit entry.

Alternative

[Check out to OneDrive](#): Use this function to check out a Microsoft Office document in ELO to Microsoft OneDrive for editing. The document is stored in your OneDrive folder until you check it back into ELO.

Edit document

Keyboard shortcut: CTRL + E

Use this function to open a document that is in the *In use* work area but is not currently open in the corresponding external application.

Save your changes in the external application and then transfer the document to ELO using the *Check in* function (available in: *Ribbon > Document*).

Check in

Keyboard shortcut: ALT + I

Use this function to transfer the edited document back to ELO. The document is no longer locked for other users.

For more information, refer to the chapter Edit entry.

Information

The function is only enabled if there is at least one document in the *In use* work area.

Check out to OneDrive

Available in: *Ribbon > Document > Versions.*

Use this function to check out a Microsoft Office document in ELO to Microsoft OneDrive for editing. The document is stored in your OneDrive folder until you check it back into ELO.

This function is only available if you have a Microsoft school or work account with Microsoft OneDrive for Business that has been activated for ELO by an administrator.

Please note

You can only use this function to edit documents with standard file formats such as *DOCX*. The document size is limited to 4 MB.

For documents with older file formats like *DOC*, use the *Check out and edit* function.

Alternative

Check out and edit: This function allows you to edit Microsoft Office documents and all other document types.

Method

1. Select the document you want to edit.
2. On the ribbon, click *Document > Versions > Check out to OneDrive*.

Result

The document is opened in a new browser tab.

While you are editing the document, it has the status *Checked out* for other users.

Changes are automatically saved in Microsoft OneDrive.

For explanations of the document synchronization status icons, see the Microsoft documentation [What do the OneDrive icons mean?](#)

Other options:

- Edit in the desktop app: You can open and edit the document in the desktop app.
- Edit collaboratively: You can invite other people to edit the document collaboratively. These people do not need an ELO account, but they must have a Microsoft account. For more information, refer to the Microsoft documentation [Share OneDrive files and folders](#).

Please note

You cannot check the document back into ELO until all users who are editing the document have closed it.

Outlook

To save a new document version in ELO, close the document and click the *Check in* button in the ELO Client.

If you want to continue editing the document at some point without checking it in, you can always open it from the following folder *OneDrive - <Name of company> > Apps > <Name of target folder>*.

Please note

You may not be able to check a document in if you are editing it in the Firefox browser and use the uBlock Origin ad blocker extension. In this case, disable the extension or switch it off for the relevant page.

Load new version

Available in: *Ribbon > Document > Versions*

You can also load a new version if you did not check out and edit the current version of a document filed to ELO.

The *Load new version* function enables you to load a file from your local file system and store it as a new version of a document in the *Repository* work area. Using this option on version-controlled documents creates a new entry in the version history and makes this new version the current working version. In the case of documents that are not version controlled, the previous version is overwritten.

The following options are available for loading a new version:

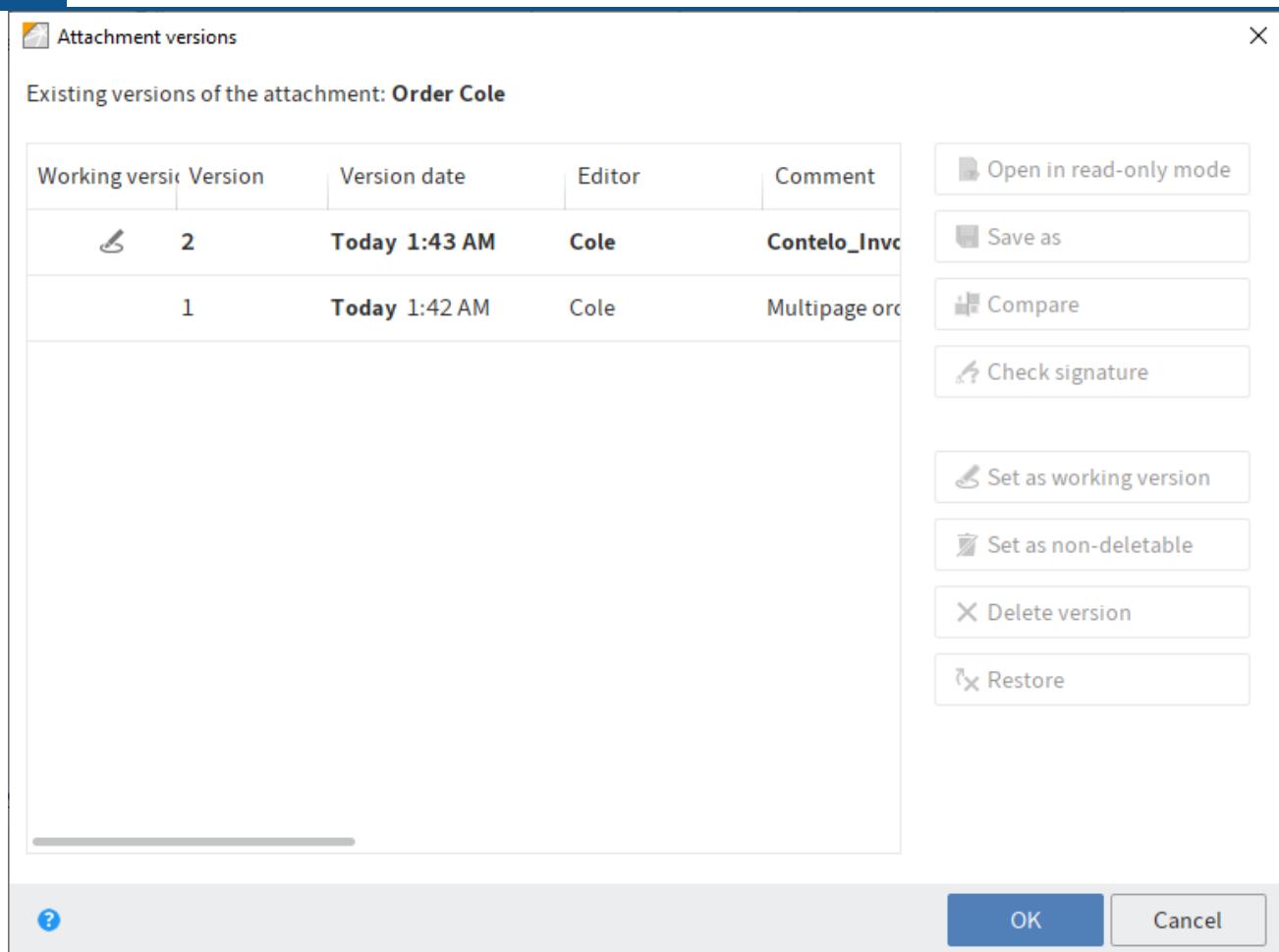
- *Load new version* function
- Drag-and-drop (left-click and hold the mouse to drag a new document to a document in ELO and release the mouse button)

Document versions

Available in: *Ribbon > Document > Versions*

Use this function to open an overview of the existing document versions for the selected entry. The current working version is displayed in bold type. The current working version is the version with the pen icon in the *Working version* column.

Among other things, you can open document versions in read-only mode, compare versions, set them as the working version, and delete them.



The following functions are available:

Open in read-only mode: Use the *Open in read-only mode* button to view the selected version in an external application.

Save as: Use this function to save versions to your local file system.

Compare: Select two versions by holding down the CTRL key and click *Compare*. The versions are shown next to each other in a new window.

Check signature: Checks the signature of a selected version. The signature module must be installed.

Set as working version: This option sets the selected version as the working version. A working version is the currently used version.

Set as non-deletable: The selected version is set as non-deletable.

Delete version: Deletes the selected version. The version is initially assigned a deletion marker and can be restored (as long as it has not been permanently deleted).

Information

To view deleted versions, enable the *Show deleted entries* function (*Ribbon > Organize > Delete*).

Restore: Removes the deletion marker from a deleted version.

Edit comment: To edit the comment for a version, double-click the corresponding comment field.

Discard document changes

Available in: *Ribbon > Document > Versions*

Use this function to delete the current working version of a document and restore the original version.

This function is only available for documents that you have checked out.

Create signature

Available in: *Ribbon > Document > Verify*

Use this function to digitally sign documents.

Requirement: Suitable third-party software and hardware must be installed.

Check signature

Available in: *Ribbon > Document > Verify*

Use this function to check the digital signature of a document. The function is only available if the document has a digital signature.

Test checksum

Available in: *Ribbon > Document > Verify*

This function verifies the checksum of the selected document. The checksum indicates whether the document has been transferred correctly to ELO. This function creates a hash value of the document. This value is checked for changes to guarantee that the document has not been changed.

Compare documents

Available in: *Ribbon > Document > Verify*

Use this function to open two documents next to each other in a new window. This allows you to compare the two documents directly.

To use this function, select two documents in the *Content* tab of an ELO folder while holding down the CTRL key.

Create preview document

Available in: *Ribbon > Document > Convert*

Use this function to create a preview document in TIFF or PDF format for the currently selected document. The preview document is a special image document that is stored separately in ELO. Use this function to display documents if there is no viewer for the original format. You can use this for CAD files, for example.

Use the *Show preview document* option to view the preview document. You will find the *Show preview document* function under *Ribbon > View > Display*.

PDF conversion

Available in: *Ribbon > Document > Convert*

Requirement: An ELO PDF Printer must be installed.

Use this function to convert a document selected in ELO into a PDF document. The document is filed to the repository as a new version.

TIFF conversion

Available in: *Ribbon > Document > Convert*

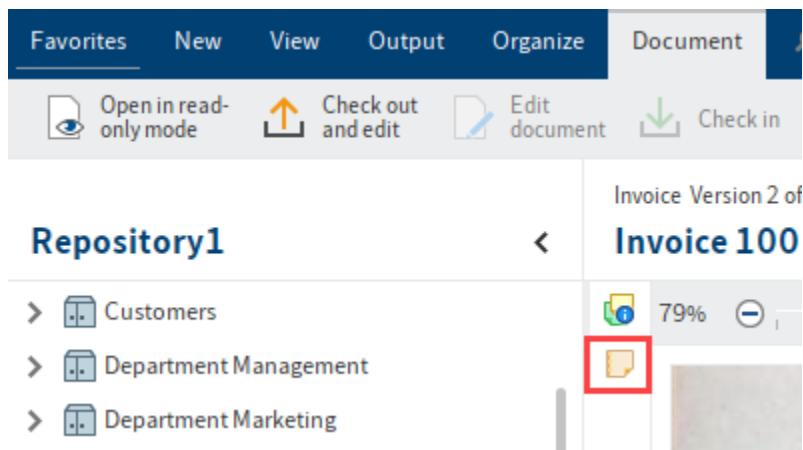
Requirement: An ELO TIFF Printer must be installed.

Use this function to convert a document selected in ELO into a TIFF document. The document is then filed as a new version of the original document.

General margin note

Available in: *Ribbon > Document > Margin note*

Use this function to create a general margin note for a document. A general margin note can be seen and edited by all users. The general margin note is yellow.



Margin notes are displayed on the split bar. If you hover over the margin note with the mouse pointer, the text, the creation date, and the editor are displayed.

Clicking the margin note icon opens the margin note for editing (or for viewing in the case of a permanent margin note).

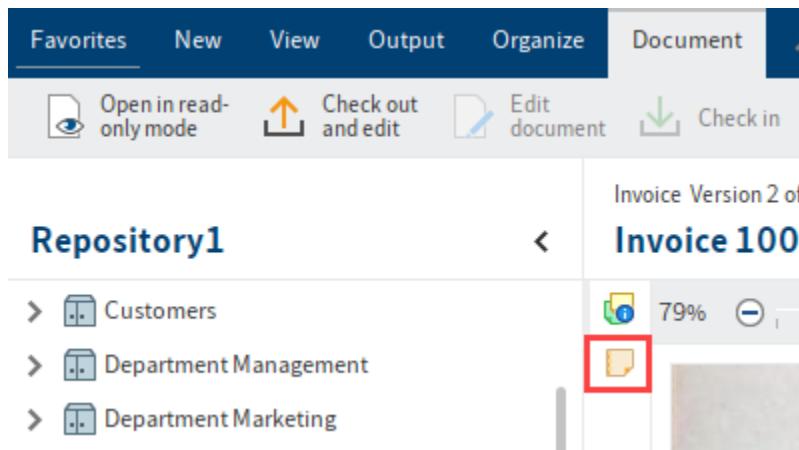
You can use the context menu to open e-mail addresses, ELO links, and web pages in a margin note (*Right-click > Open links*).

A margin note applies to the entire document, and not just the current version.

Personal margin note

Available in: *Ribbon > Document > Margin note*

Use this function to create a personal margin note for a document. Personal margin notes can only be viewed or edited by the creator of the margin note. Personal margin notes are green.



Margin notes are displayed on the split bar. If you hover over the margin note with the mouse pointer, the text, the creation date, and the editor are displayed.

Clicking the margin note icon opens the margin note for editing (or for viewing in the case of a permanent margin note).

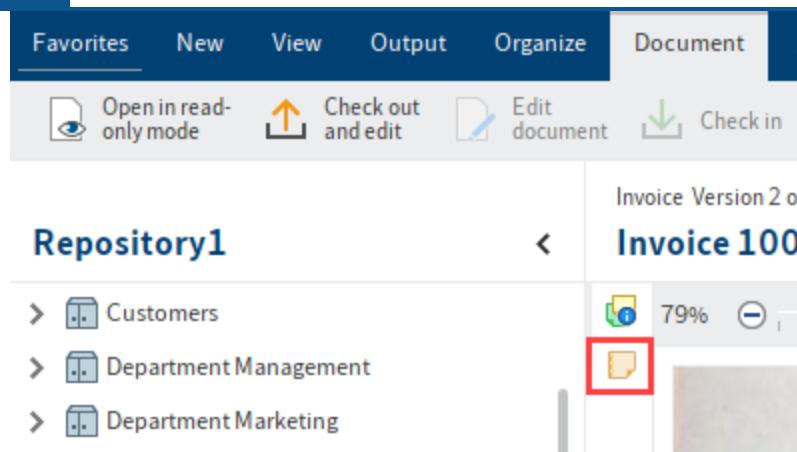
You can use the context menu to open e-mail addresses, ELO links, and web pages in a margin note (*Right-click > Open links*).

A margin note applies to the entire document, and not just the current version.

Permanent margin note

Available in: *Ribbon > Document > Margin note*

Use this function to create a permanent margin note for a document. A permanent margin note can be seen by all users. Unlike general and personal margin notes, permanent margin notes cannot be edited or deleted. The permanent margin note is red.



Margin notes are displayed on the split bar. If you hover over the margin note with the mouse pointer, the text, the creation date, and the editor are displayed.

Clicking the margin note icon opens the margin note for viewing.

You can use the context menu to open e-mail addresses, ELO links, and web pages in a margin note (*Right-click > Open links*).

A margin note applies to the entire document, and not just the current version.

Open attachment in read-only mode

Available in: *Ribbon > Document > Attachment*

Use this function to open an [attachment](#) in the corresponding external application, such as Microsoft Word.

Attachment versions

Available in: *Ribbon > Document > Attachment*

Use this function to open an overview of the [attachment](#) versions. You can open, store, compare, or delete individual attachments. In addition, you can check the signature of an attachment and restore a deleted attachment.

The following options are available:

Open in read-only mode: Use the *Open in read-only mode* button to open the attachment of a selected version in an external application.

Save as: With this function, you can store versions of the attachment selected in a list of versions outside of ELO.

Compare: To compare two versions, select two entries in the versions overview list and then click *Compare*.

Check signature: If you have signed attachment, you can check the signature with this button.

Set as working version: This option sets the selected version as the working version. A working version is the currently used version.

Set as non-deletable: The selected version is set as non-deletable.

Delete version: Delete a version selected in the list.

The version is highlighted in red after deletion.

Restore: Restore a deleted version (marked red) with the *Restore* button.

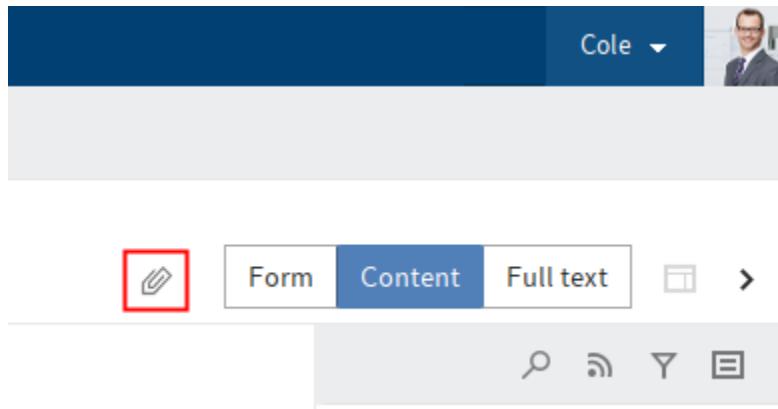
The version is restored to the list and is no longer highlighted.

OK: Click *OK* to save changes and close the dialog box.

Add attachment

Available in: *Ribbon > Document > Attachment*

This function enables you to transfer a file from your local file system and attach it to an ELO document. The local file is copied to ELO and linked to the document stored in ELO.



You will recognize an attachment by the paper clip icon of the *Open attachment* button.

To open the attachment, click the *Open attachment* button.

Information

If you add a second attachment to a document, you can only access the first attachment using the *Attachment versions* function.

Save attachment as

Available in: *Ribbon > Document > Attachment*

If a document has an attachment, you can use the *Save attachment as* function to save this attachment outside of ELO in your local file system or on an external storage medium.

Delete attachment

Available in: *Ribbon > Document > Attachment*

Delete an attachment with this function.

'Search' tab

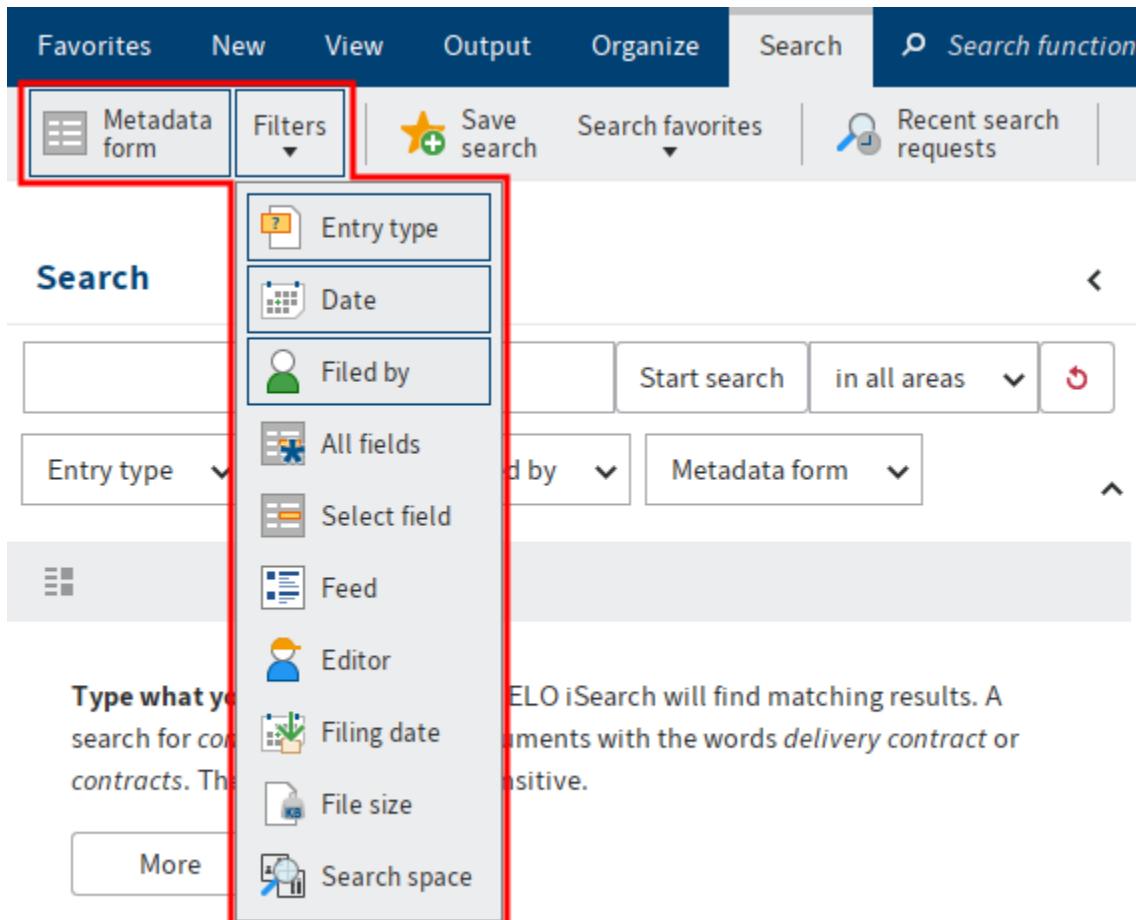
For general information about the search, refer to the chapter 'Search' work area.

The chapter Search entries explains how to run a search and view the search results.

Filters

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

You can access the filters under *Ribbon > Search*.



ELO iSearch provides the following filters:

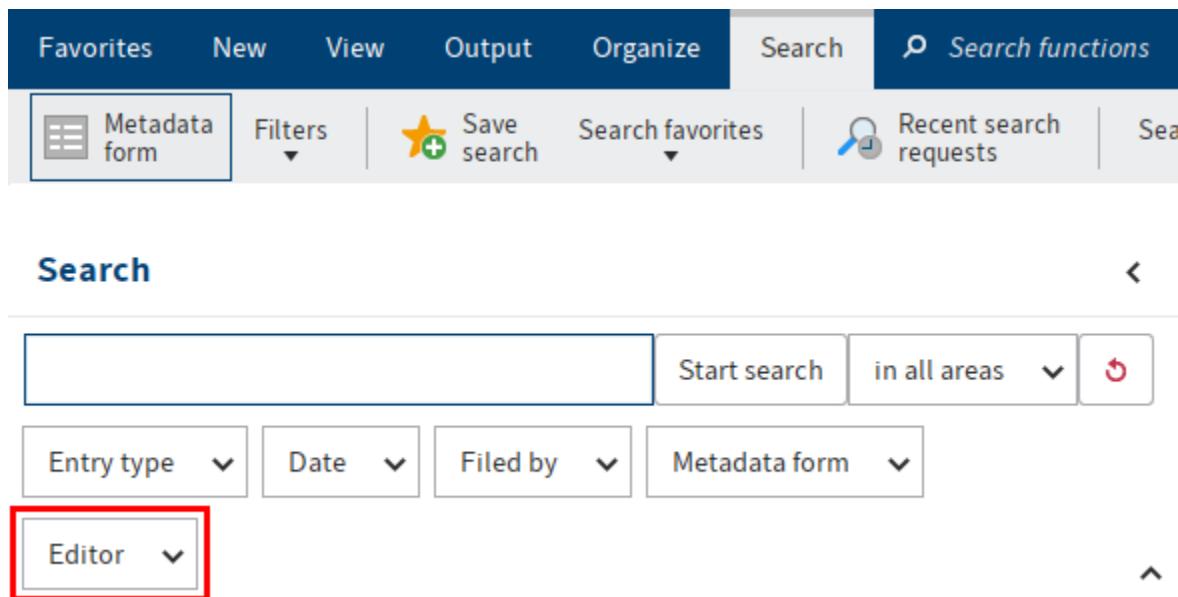
- Metadata form: Filters the search by the selected metadata form.
- Entry type: Filters the search by the selected entry type (e.g. folder, image document, Word document).
- Date: Filters the search by the selected document date.
- Filed by: Filters the search by the user that filed the entries.
- All fields: Enables the user to search in all fields.
-

[Select field](#): Enables the user to search a field in a metadata form. You can select multiple fields in a form by holding down the CTRL key.

- Feed: Enables the user to search posts and hashtags within the ELO feed.
- Editor: Filters the search by the user entered as the editor in the *Metadata* dialog box.
- [Filing date](#): Filters the search by the selected filing date.
- File size: Filters the search by the selected file size.
- Search spaces: Enables you to run a search in a selected space.

Enable/disable filter

Click to enable or disable the filter. You can recognize an enabled filter by the gray border around the button. As soon as you have enabled a filter, the corresponding field appears below the search field.



Click the arrow icon to the right of the field to open a drop-down menu for selecting options.

The selection options vary depending on the filter.

The selected setting appears in the filter field.

The filter becomes active when you start a search.

Alternative: Click *Reset search* to filter the search results for a search that has already run.

Combine filters

The screenshot shows the ELO Java Client interface with the 'Search' tab selected. At the top, there's a navigation bar with 'Favorites', 'New', 'View', 'Output', 'Organize', 'Search', and a 'Search functions' button. Below the navigation bar is a toolbar with icons for 'Metadata form', 'Filters', 'Save search', 'Search favorites', 'Recent search requests', and a search history dropdown. The main search area has a search input field, a 'Start search' button, a 'in all areas' dropdown, and a refresh button. Below the search bar, there are four filter buttons: 'Entry type' (with PDF and Image options), 'Date' (set to 2023), 'Filed by' (dropdown), and 'Metadata form' (dropdown). A red box highlights the 'Entry type' and 'Date' filters. Below these filters, there are dropdowns for 'Filed by' and 'Metadata form', and a message indicating 'About 3 results'.

You can combine filters.

- Multiple filters: By combining different filters, you can narrow down the search results based on multiple criteria. This allows you to create precise search requests.
- Multiple filters of one type: Use multiple filters of the same type to set more advanced filters. For example, multiple *Entry type* filters allow you to perform a search filtered by multiple entry types.

Negate filters

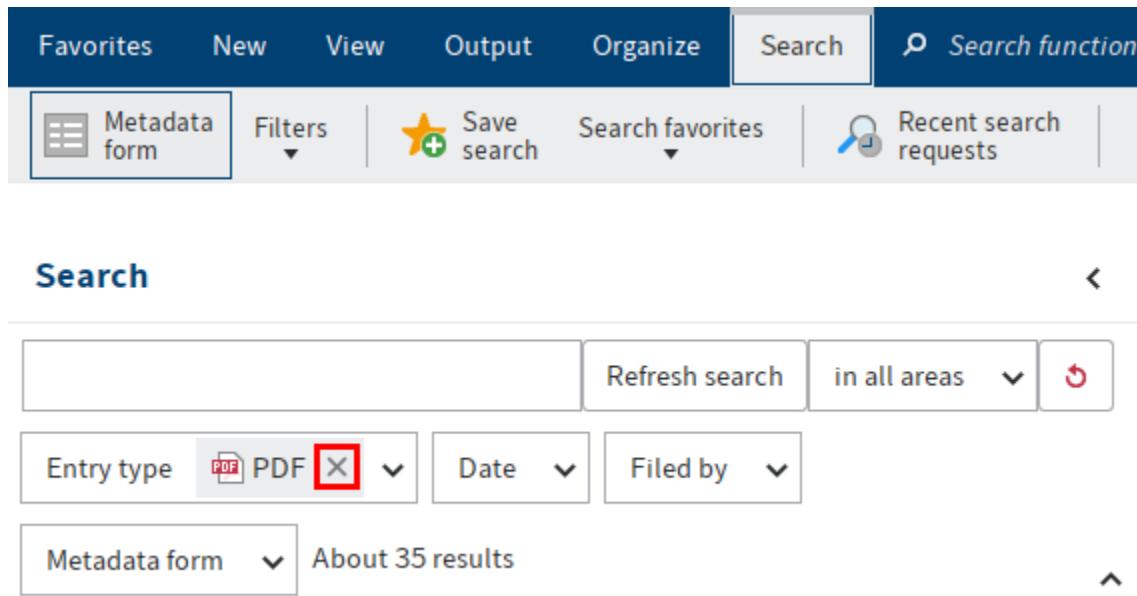
The screenshot shows the ELO Java Client interface with the 'Search' tab selected. The layout is similar to the previous screenshot, with a navigation bar, toolbar, and search area. The filter section at the bottom includes 'Entry type', 'Date', 'Filed by', and 'Metadata form' dropdowns. A red box highlights the 'Entry type' dropdown. A tooltip for the 'Entry type' dropdown shows two options: 'does not contain' and 'Hide filter'. The 'does not contain' option is highlighted with a red box.

You can set filters to exclude specific values.

Right-click the filter field to open the context menu. In the context menu, enable the option *does not contain*.

The filter is now in *is not* mode.

Remove filters



To remove the filter, click the X icon next to the selected filter value.

Filter with date

The screenshot shows the ELO Java Client search interface. At the top, there is a navigation bar with tabs: Favorites, New, View, Output, Organize, Search, and a 'Search functions' button. Below the navigation bar, there are several search-related buttons: 'Metadata form' (highlighted with a blue border), 'Filters', 'Save search', 'Search favorites', 'Recent search requests', 'Search logic', and 'Result'. The main search area has a search input field, a 'Start search' button, and a dropdown for 'in all areas'. Below the search area, there are four dropdown menus: 'Entry type', 'Date' (highlighted with a red border), 'Filed by', and 'Metadata form'. A tooltip 'Apply date with ENTER' is visible above the calendar. The calendar itself shows the month of January 2023, with the date 26 highlighted in black. Other dates are shown in a light gray color.

Use the *Date* and *Filing date* filters to filter your search by a specific date or period. Both filters apply the same principle.

This type of filter offers the following options:

Input field: To select a specific date, click the corresponding date in the calendar.

Alternative 1: Enter the date manually in the input field. The following pattern is recommended: MM/DD/YYYY.

Alternative 2: Enter the period manually in the input field. The following rules apply:

-

Past: If you enter a minus sign and a number, the corresponding period in the past is selected.

- Future: If you enter a plus sign and a number, the corresponding period in the future is selected.
- Months: If you add an **m** to the number value, the period is calculated in months instead of days.

Examples

For example, if you enter the value **-14**, the filter applies the setting *Last 14 days*.

In contrast, if you enter the value **-6m**, the *Last 6 months* setting is applied.

Range: Clicking the *Range* button opens two additional input fields (*from* and *to*). Use these fields to define a period of time. Manually enter the start and end date or select them using the calendar.

Today: Click *Today* to automatically select the current date.

Last 10 days: Clicking *Last 10 days* automatically sets the period to the last 10 days.

Last 30 days: Clicking *Last 30 days* automatically sets the period to the last 30 days.

Last 3 months: Clicking *Last 3 months* automatically sets the period to the last 3 months.

Show calendar (small calendar icon): Clicking *Show calendar* opens a calendar in the middle of the drop-down menu.

Show list of years (list icon): Clicking the *Show list of years* button opens a list of years in the middle of the drop-down menu. To select one or more years as a date range, enable the corresponding check boxes.

Filter: Numeric

The screenshot shows the ELO Java Client interface with the 'Search' tab selected. At the top, there's a navigation bar with 'Favorites', 'New', 'View', 'Output', 'Organize', 'Search', and 'Search functions'. Below the navigation bar are several search-related buttons: 'Metadata form', 'Filters', 'Search favorites', 'Recent search requests', 'Search logic', and 'Result'. The main search area has fields for 'Entry type', 'Date', 'Filed by', and 'Metadata form'. A dropdown menu for 'Invoice amount' is open, showing two filter options: '<100000' and '>100000'. The entire dropdown menu is highlighted with a red border.

Metadata fields with the file type *Number* can be filtered by number values and number ranges.

Enter the desired number value or number range in the filter input field.

To enter a number range, you have the following options:

- <: To enter a number range less than a specific number, enter the less-than symbol (<) and the number.
- >: To enter a number range greater than a specific number, enter the greater-than symbol (>) and the number.
- ...: To enter a range between two numbers, separate these numbers with three periods (...).

Save search

You can also save searches as favorites. There are two ways to start a new search with a search favorite:

- From the *Search favorites* drop-down menu on the *Search* tab
- From the search favorite tile in *My ELO*

Search favorites are automatically saved in the *Search favorites* drop-down menu and as a tile. You can find the tile in the tile navigation of *My ELO* under *Hidden tiles*.

If you click a search favorite, the search term is applied to the search field. You can start a new search with the search favorite.

Manage search favorites

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

Use this function to rename or delete a search favorite.

Use the arrow icons to change the order of the favorites in the drop-down menu.

Click the *Delete* button to delete the selected favorite. The favorite is initially marked red. The favorite is deleted once you click *OK*, closing the dialog box. If you close the dialog box with the *Cancel* button, the delete action is reversed.

Recent search requests

ELO saves the ten most recent search requests. Click the search request to run the search again.

The search requests are saved when you close ELO.

The menu contains previous ELO iSearch requests and metadata search requests.

Search metadata

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

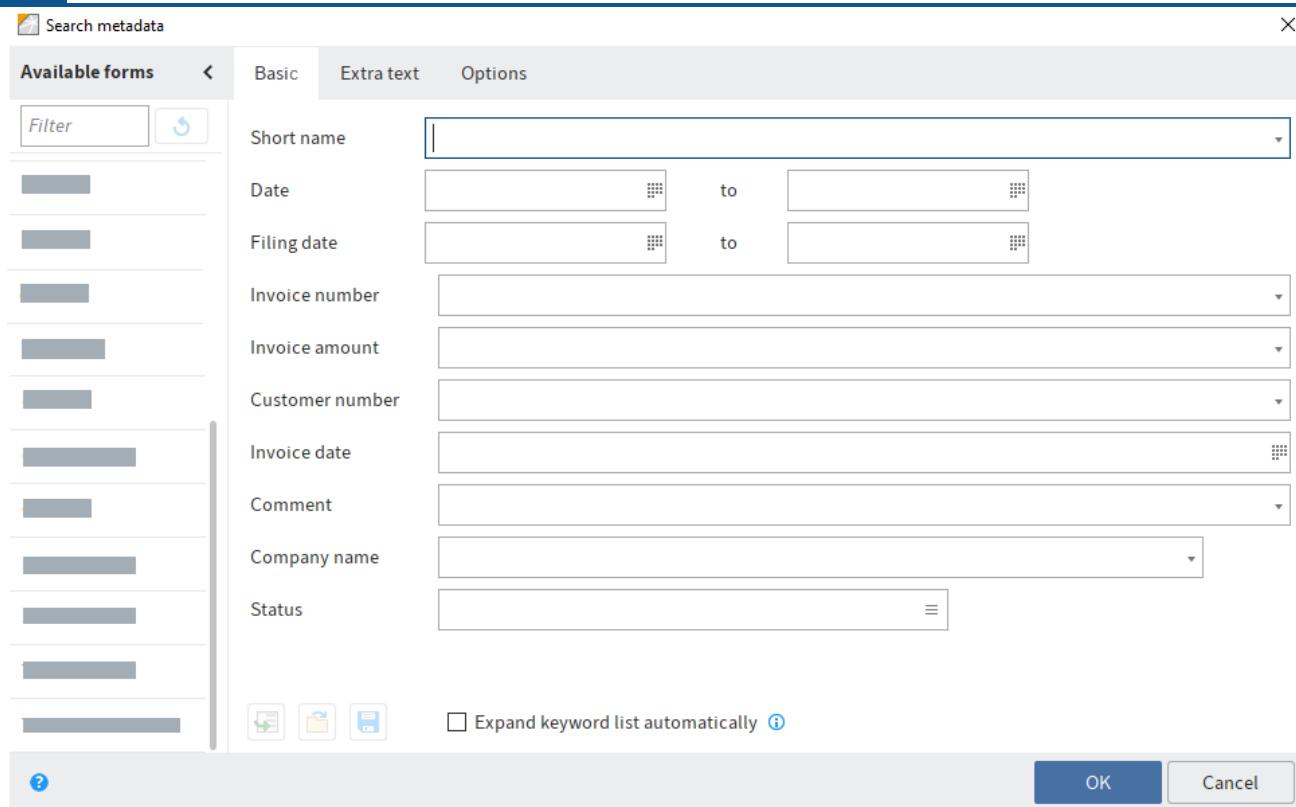
Keyboard shortcut: CTRL + F

This function enables you to search the fields of metadata forms.

In addition to using the ELO iSearch, ELO enables you to search the metadata using metadata forms. The metadata search allows you to search for specific metadata.

Information

If you want to use a metadata form for the search, your administrator first has to enable the corresponding setting.



The following options are available in the *Search metadata* dialog box:

Form selection

All metadata forms that can be used as a search form are displayed in the *Available forms* area. Select the metadata form that you used to file the document you are searching for, e. g. *Invoice*. This limits the search to documents that have been assigned this metadata form.

Information

The *Filter* field enables the user to browse or filter the *Available forms* area.

Dashboards

In the *Search* work area, buttons are available that allow you to launch dashboards after conducting a search with a form filter. These buttons are only displayed if dashboards have been stored for the corresponding metadata form.

The screenshot shows the ELO Java Client search interface. At the top, there's a navigation bar with tabs like Favorites, New, View, Output, Organize, Document, Search, and a search function dropdown. Below the navigation bar are buttons for Metadata form, Filters, Save search, Search favorites, Recent search requests, Search logic, and Result.

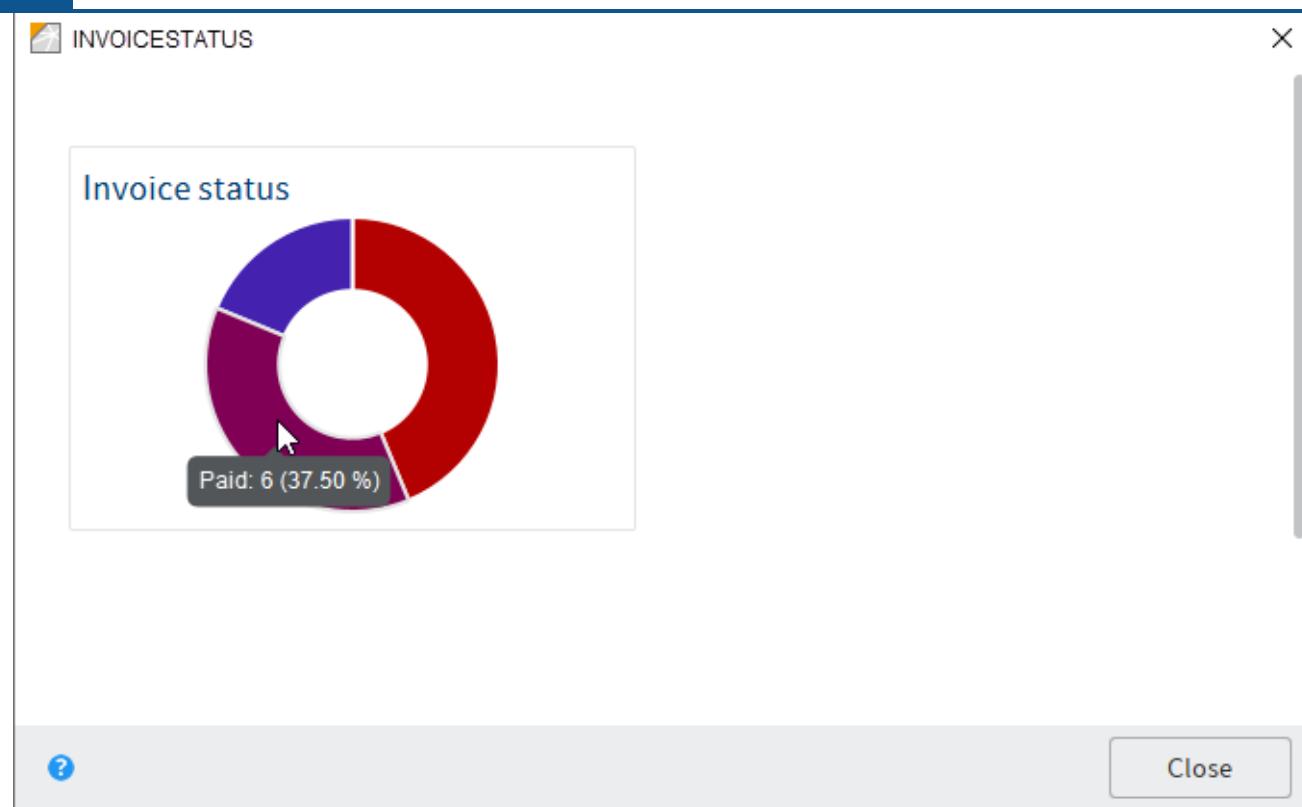
In the center, the search results are displayed under the heading "Search". A search bar contains the placeholder "*". To its right are buttons for Refresh search, in all areas, and a refresh icon. Below the search bar are filters: Entry type, Date, Filed by, Metadata form (set to Outgoing invoice), and Space.

The main area shows a list of results with three columns: Type, Short name, and Date. The first result is "(86078CE1-9A7E-5077-DE78-4093975AD21F)". The second result is "Rechnung_Contelo_2021_10_12" dated Oct 12, 2021, 2:58 P...". The third result is "(0C220213-FBBD-4E93-E789-3D07DCAEAE4D)" dated Dec 21, 2022, 9:35 A...". The fourth result is "(E16D7F56-4A75-300C-9C6F-C708E41CFB7B)" dated Dec 6, 2022, 11:00 P...".

A red box highlights two buttons at the top of the results table: "COMPANIES" and "INVOICESTATUS". On the right side of the interface, there are several status indicators: Outgoing (8607), EZ, D, k, w, +, Gar, Obs, 790!, and Bt.

Dashboards are created by the administrator.

The dashboards allow you to visualize metadata of entries filed with the same metadata form in different ways. You can use bar charts, line charts, and doughnut charts.



You can view details about dashboards by clicking on them.

Search fields

The search fields of the metadata form are shown on the corresponding tab. They correspond to the fields on a metadata form. The tabs and search fields that appear depend on the settings for the corresponding search form.

You can use the search fields to search specifically for the entries in these fields, such as for the *Invoice number* or the *Filing date*.

Information

When searching the metadata, it is possible to make entries to multiple fields of a search form. This allows you to create complex search queries.

For example, enter the name Smith in the *Customer* field. ELO then searches exclusively in the *Customer* field of the documents that were filed with the *Invoice* metadata form.

Information

You can use keyword lists for entering search terms.

Options

The *Options* tab provides additional options to restrict the search to specific criteria.

Personal identifier: Use this field to search the contents of the *Personal identifier* field. Enter the term you entered in the metadata. If you want to search all entries with a personal identifier, enter * to the search field.

End of deletion period: These two fields enable you to restrict the search to entries with a specific deletion period.

End of retention period: These two fields enable you to restrict the search to entries with a specific retention period.

Entry type: This enables you to restrict the search to specific entry types (e. g. folders, PDF, Word document).

Notes: Allows users to search for notes. Select the note type from the drop-down menu.

Search range: The options in the *Search range* define what is to be searched.

Search mode: The search mode is important when you use multiple fields for the search. Use the *Search mode* drop-down menu to specify whether the fields are linked with Boolean AND or with Boolean OR.

- AND: Only matches meeting all criteria are returned.
- OR: All matches meeting at least one of the criteria are returned.

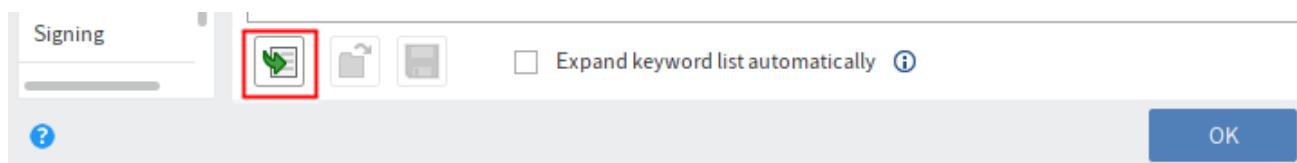
Filed by: Allows users to restrict the search to entries by specific users.

File name: Allows users to restrict the search to entries with a specific file name.

Start search

Click the *OK* button when you have completed the search form.

Previous searches



If you have already carried out multiple search requests, clicking *Enter metadata using the most recently saved/displayed entries [F3]* (icon with green arrow) will open a list of previous search requests. Both the search term and the field used are displayed.

Select one of the listed entries and click *OK*. The terms will then be transferred to the search form.

AND/OR search in fields

Content type	<input type="text"/>	
Target group	<input type="text"/>	
Product	"ELOprofessional" OR "ELOenterprise"	
Topic	<input type="text"/>	

To search fields using AND/OR links, the search terms must be placed in quotation marks. One of the operators (AND or OR) must be placed between the search terms.

Current folder only

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

Use this function to restrict the search to the folder selected last in the *Repository* work area. You need to click *Start search* again for the restrictions for a previously performed search to take effect. If you select the *Current folder only* option, the searched folder is displayed in a tooltip.

Please note

If the *Current folder only* option is enabled, the search can take a lot longer.

Show deleted entries

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

To search exclusively for deleted entries, enable the function *Show deleted entries*. If the *Show deleted entries* option is enabled (highlighted yellow), you will ONLY see deleted entries in the search results.

Dynamic folder

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

You can save a previous search request as a dynamic folder in the *Repository* work area. Only entries that match the search criteria are displayed in a dynamic folder. If a new document is filed to ELO that matches the search criteria, the new document is automatically displayed in the dynamic folder. For example, you can display all invoices with the status unpaid in a dynamic folder.

Dynamic folders are saved in the *Repository* work area. You can save them to any location here.

Remove from search results

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

Use this function to remove individual entries from the list of search results. The entries remain unchanged in ELO. If you perform the same search again, then all matches will be displayed.

'Task' tab

Refresh

This function refreshes the task list. New tasks are denoted with a green dot.

Show workflow

In this dialog box, you can view and edit existing workflow tasks.

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

You will find more information in the chapter Workflow designer.

Forward workflow

Use this function to forward the selected workflow to the next workflow node. This ends your own workflow task and sends it to the next user.

You can also forward a workflow by double-clicking the entry in the task list.

You will find more information in the chapter Forward workflow.

Accept workflow

Use this function to accept a workflow node that was assigned to a group. You will be entered as the user in the workflow node. The workflow is no longer displayed in the *Tasks* work areas of the other group members. This prevents the workflow from being processed by multiple users at once.

You can also accept a form workflow by double-clicking the entry in the task list.

Use the *Return workflow* function to undo this action.

Return workflow

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

Use this function to return a workflow node to the group that was originally assigned the node. The group is displayed again in the workflow node.

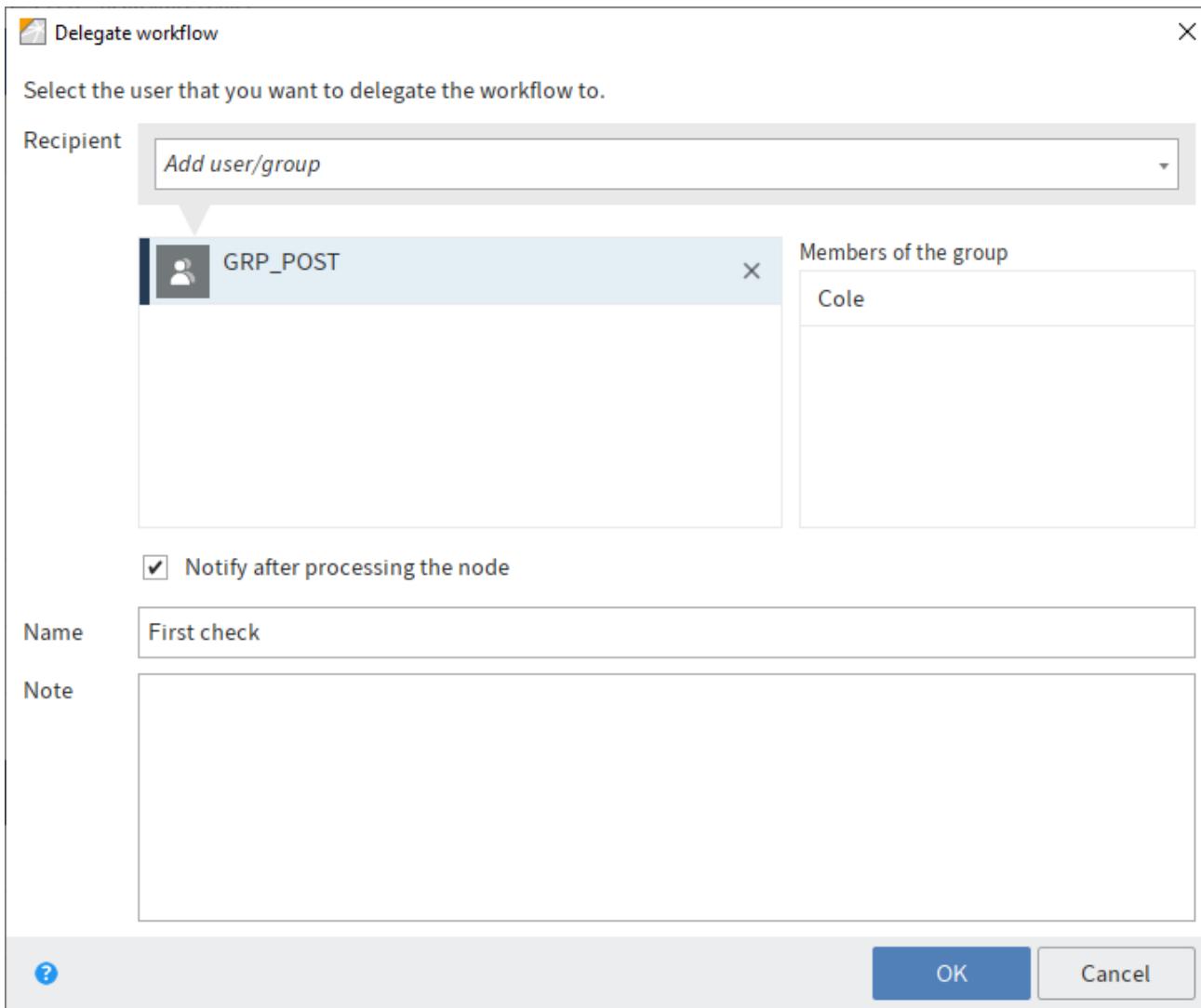
Delegate workflow

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

Use this function to delegate a workflow node to another user. The user is displayed in an additional node in the workflow. Use the *Delegate workflow* dialog box to specify whether you want to be notified after completing the workflow task.

Information

Whereas in the *Hand off workflow* function, another user is assigned the workflow node, the *Delegate workflow* function creates an additional node for the user. The original assignment remains unchanged.



Recipient

Search for the desired user or group in the *Add user/group* field. Suggestions will appear as you type.

Click the corresponding suggestion to select a user or a group.

Alternative: If you click the triangle to the right of the *Select user/group* field, this will open a drop-down menu. The drop-down menu contains a list of the users and groups you selected recently.

Members of the group

If you select a group, you will see the group members in the *Members of the group* column.

Double-click the corresponding user in the *Members of the group* column to select a member of a group.

Clear selection

To cancel the selection, click the X icon next to the selected user or group.

Notify after processing the node: If this check box is selected, you will receive a notification after the node is processed.

Name

Change the name of the task if required.

Comments

Write a note or a job instruction for the user you are delegating the workflow node to.

Postpone workflow

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

Use the *Postpone workflow* function to suspend processing of a workflow. You can specify a date until which a workflow will be hidden in the *Tasks* work area. Once the date has been reached, the workflow appears in the list again. In the *Postponement date* column, you can sort postponed workflows in the task list in the *Tasks* work area.

You can create a task view that gives you an overview of your postponed workflows. You will find more information in this chapter: Create tile.

Use the *Cancel postponement* function to cancel a workflow postponement. In the *Postponement date* column, you can sort postponed workflows in the task list in the *Tasks* work area.

Cancel postponement

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

Use this function to cancel postponement of a workflow. If a workflow has been postponed, it remains active but is hidden in the *Tasks* work area.

Add a new task view to show the hidden workflows. For example, you can configure the view to only show postponed workflows. Switch to the *Tasks* work area > *View* tab. Click *New view*. Create a new view in the dialog box, enter the name *Postponed workflows* and enable the *Show postponed workflows* option.

To cancel a postponement, select the corresponding workflow and click the *Cancel postponement* button.

Information

If the *Postponement date* column is not displayed, there are two ways to show the column:
Right-click the row with the table heading and select the check box in the drop-down menu before the *Postponement date* column name.

Alternative: In the gray toolbar, click *Display options > Table > Restore table columns*. The default table settings are restored. The *Defer date* column is shown again.

Extend workflow deadline

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

Use this function to extend the deadline of a workflow. The function can only be used with workflows that have passed a deadline.

Specify how many days, hours, and minutes you want to extend the deadline by.

The new deadline is displayed in the *New deadline* column.

The responsible user is displayed in the *Responsible* column.

Please note

This function does not apply to individual nodes but to the maximum duration that is specified at the start node.

Edit reminder

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

Use this function to edit an existing reminder. You can view and edit the current settings.

There are two ways to delete a reminder:

- Select the reminder in the *Tasks* work area and click the function *Delete* (available in: *Ribbon > Organize*).
- With the function *Delete reminder* (available in: *Ribbon > Organize > Overviews > Reminders overview*)

You can learn how to create reminders in the chapter *Reminder*.

Hand off workflow

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

Use this function to transfer an active workflow node to another user. The user is displayed in the node and the workflow appears in the user's *Tasks* work area. The new user is entered in place of the original user.

Unlike the [Delegate workflow](#) function, you hand off the workflow step entirely and are no longer notified of the progress of the workflow.

Mark as unread

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

This function enables you to mark a task as unread. The task is denoted with a green dot.

Group tasks

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

Use this function to add the group tasks to the list in the *Tasks* work area. Group tasks are tasks that were assigned to multiple persons, e. g. a department. To display group tasks in your task list, you need to be a member of the corresponding group.

You can tell whether the *Group tasks* function is enabled by the border around the button.

Please note

You cannot set a *Read* marker for group tasks.

Substitution tasks

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

Enable this option to view substitution tasks in the *Tasks* work area. Substitution tasks are tasks of another user for which you are set as the substitute. This can be the case if you are covering for someone on vacation.

You can tell whether the *Substitution* function is enabled by the border around the button.

Please note

You cannot set a *Read* marker for substitution tasks.

You will find more information on the topic of substitution here:

- Assign substitute
- Accept substitution
- View substituted user's Intray

Escalations

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

Use this function to display tasks with overdue deadlines and those for which you are entered as the responsible user in the *Escalation management* dialog box. The *Show workflow* function allows you to see at what point the task was escalated.

You can tell whether the *Escalation* function is enabled by the border around the button.

If a task is escalated, a red icon with a white exclamation mark is displayed in the *Priority* column of the task list.

'File' tab

Refresh

Keyboard shortcut: F5 key

This function refreshes the view.

Scan pages

Use this function to scan individual pages. The individual pages are filed to the *Intray* work area as separate documents.

For more information on how to scan and store a document in the Intray, refer to the chapter Insert document.

Scan document

Use this function to scan multiple pages and merge into one document. The scanned document will be displayed in the *Intray* work area. At least one scanner must be installed for this function to work.

For more information on how to scan and store a document in the Intray, refer to the chapter Insert document.

Select scan profile (drop-down menu)

Available in: *Ribbon > File > Scan*

Use the drop-down menu to select a scan profile for the next scan. Create new scan profiles with the *Scan profiles* function.

Scan profiles

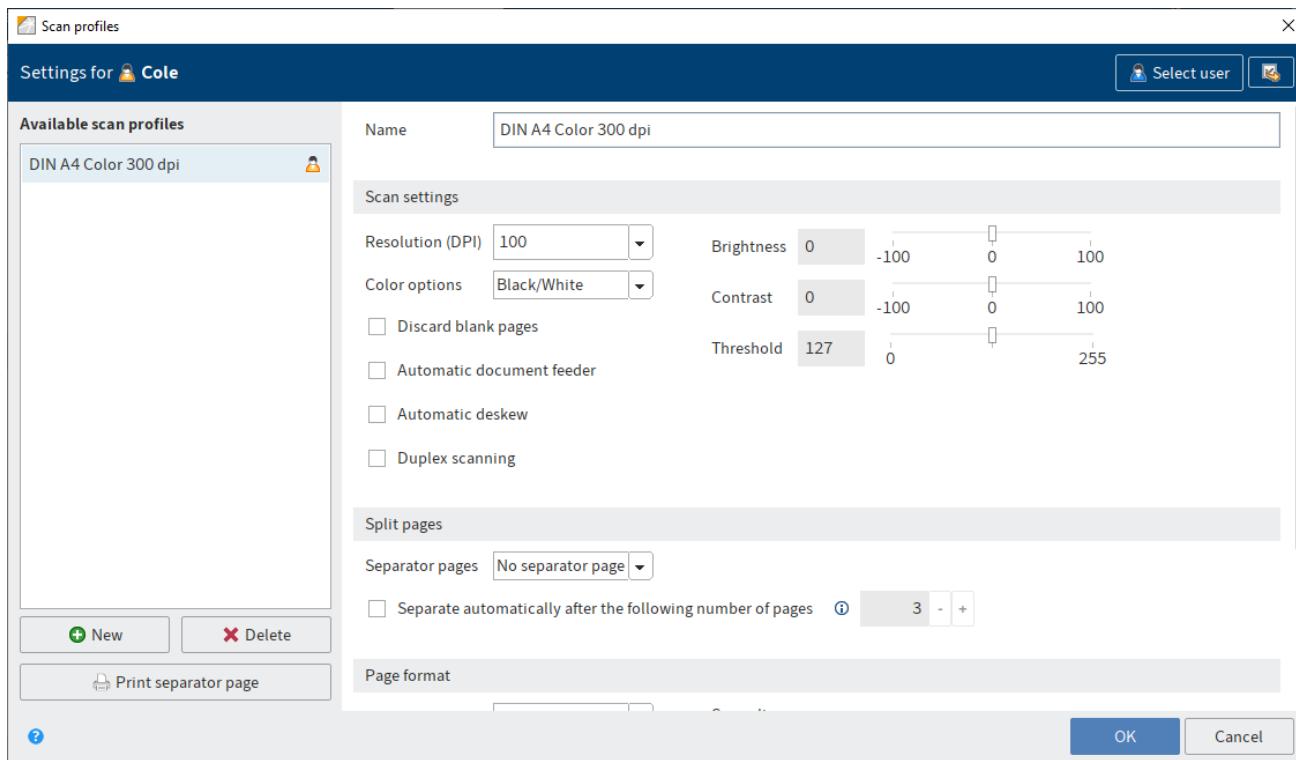
Available in: *Ribbon > File > Scan*

Use this function to open the *Scan profiles* dialog box. Define profiles for scanning documents in the *Scan profiles* dialog box. A scan profile enables you to define settings, such as which resolution to use or which format to store the scanned documents in. This way, you can set up a custom scan profile for each source document.

Scan profiles are used to take the specific properties of documents into account, such as texts, color images, high-resolution images, different formats, etc.

Information

You will also find the *Print separator pages* function in the *Scan profiles* dialog box. You can find more information about this function in the [Join \(separator pages\)](#) section.



You can make the following settings:

Available scan profiles

Under *Available scan profiles*, you can see all scan profiles available to the selected user or group.

New: Click the *New* button to create a new scan profile.

Delete: Click *Delete* to remove the selected scan profile.

Print separator page: Opens the *Print separator page* dialog box. In the *Print separator page* dialog box, select whether a separator page will be printed with horizontal or vertical bars.

You need a separator page when you scan multiple documents one after the other. A separator page shows the transition to a new document and ensures that the documents are filed individually to the *Intray* work area after scanning.

Name of the profile

Name: Use the *Name* field to enter the name of the selected scan profile.

Scan settings

The following settings apply to the scan process. The settings can only be edited if you have created a new profile or selected an existing profile.

Information

The settings are not supported by all scanners.

Resolution in dpi: In the *Resolution in dpi* drop-down menu, you can select the resolution (dpi = dots per inch) for the scan process.

Color options: In the *Color options* drop-down menu, select whether you want to create a color, black/white, or grayscale scan.

Discard blank pages: If the *Discard blank pages* option is enabled, blank pages will not be scanned.

Automatic document feeder: The *Automatic document feeder* option is intended for scanner who have an automatic paper feeder.

Automatic deskew: If the *Automatic deskew* option is enabled, pages scanned diagonally are straightened, if possible.

Duplex scanning: The *Duplex scan* option is intended for scanners that can scan front and back pages.

Brightness: Use the *Brightness* slider to define the brightness of the scan.

Contrast: Use the *Contrast* slider to define the contrast of the scan.

Threshold: Use the *Threshold* slider to define the threshold for the scan process. The threshold is the value that determines whether a pixel is white or black.

Select scanner

Available in: *Ribbon > File > Scan*

Use this function to choose the scanner that you want to use. This function only applies when you use multiple scanners.

Join pages

Use this function to join multiple TIFF or PDF files into a multi-page file in the *Intray* work area.

Method

1. Hold down the CTRL key and select each document in the Intray in turn.

The topmost selected document will be the first page of the new document.

2. Click *Join pages*.

Keyboard shortcut: CTRL + K

Result

The individual pages are merged into one document.

Information

Use the *Split pages* function to separate a multi-page document into individual pages.

Split pages

Keyboard shortcut: CTRL + T

Use this function to split the pages of a multi-page document in the *Intray* work area. The pages are numbered as individual documents in the *Intray* work area. The original is removed. The function is only available for multi-page TIFF and PDF documents.

Join (separator pages)

Available in: *Intray* > *Ribbon* > *File* > *Join*

Information

This function is only available for TIFF and PDF files.

You need this function for scanning documents with multiple pages. To select the start and end of a document, add separator pages to the stack during scanning.

Use empty pages or pages with a black bar as separator pages. You can print the separator pages via *File* > *Scan* > *Scan profiles*.

If the *Join (separator pages)* function is enabled, the separator pages are automatically recognized and the documents are merged into multi-page documents.

Choose from two different merge options for separator pages:

- Join using black bar separator pages
- Join using blank pages as separator page

You will find the settings for the merge options on the *Ribbon* > *User menu [your name]* > *Configuration* > *Advanced settings* > *Settings for the Intray work area*.

Metadata

Keyboard shortcut: F4 key

The *Metadata* dialog box is where you enter standardized information about a document, making it easier to find in the search.

For detailed information, refer to the chapter Metadata.

Edit document

Keyboard shortcut: CTRL + E

This function opens the selected document for editing in an external program.

Save your changes in the external program. The changes are applied to the document in the Intray.

Delete metadata

Available in: *Intray > Ribbon > File > Edit*

Use this function to delete the metadata of a document in the *Intray* work area. Once a document has been filed to ELO, you can edit the metadata but not delete it.

Barcode recognition

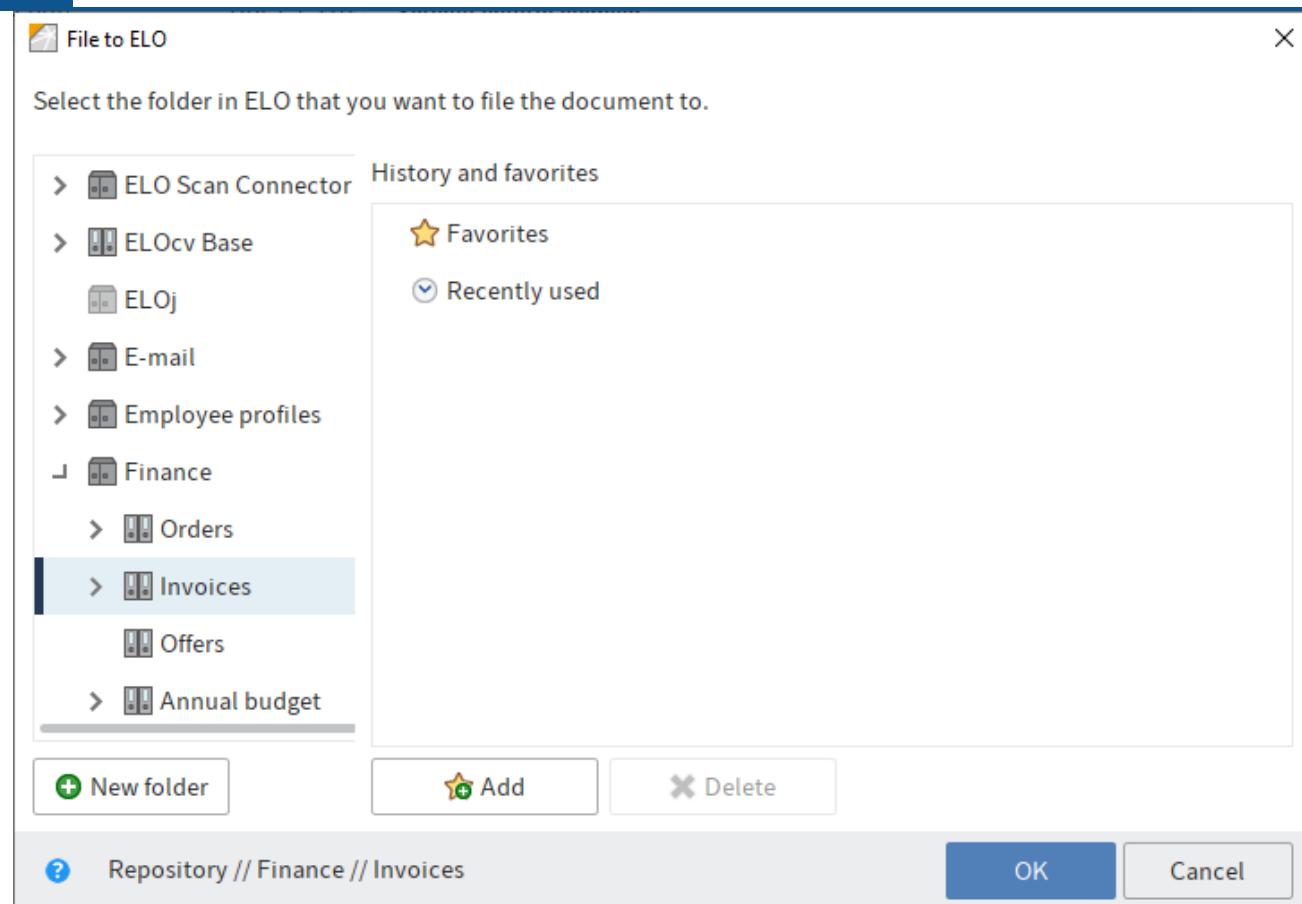
Available in: *Intray > Ribbon > File > Edit*

This function starts the automatic barcode recognition process. To use this function, you need the ELO Barcode module. ELO Barcode allows you to read barcode information in image files, such as scanned invoices.

For more information, refer to the [ELO Barcode](#) documentation.

File to ELO

Use this function to file a document from the *Intray* work area to ELO. Choose the desired filing location in the dialog box. Use the *Go to* function to show the filing location in ELO.



The following functions are available:

New folder: Use this function to create a new folder at the location selected in ELO.

Add: Use this function to create a new favorite. The favorites are listed under your *Favorites* and enable you to quickly select a filing location.

Delete: Removes a previously selected favorite.

Automatic filing

Available in: *Intray > Ribbon > File > Filing*

Use this function to automatically file a document to ELO. You do not have to select the filing target manually. To use this function, the document must have been assigned a metadata form that contains a filing definition.

Information

You cannot edit metadata forms in the ELO Java Client. You need to do this in the ELO Administration Console. Contact your system administrator if necessary.

Serial filing

Available in: *Intray > Ribbon > File > Filing*

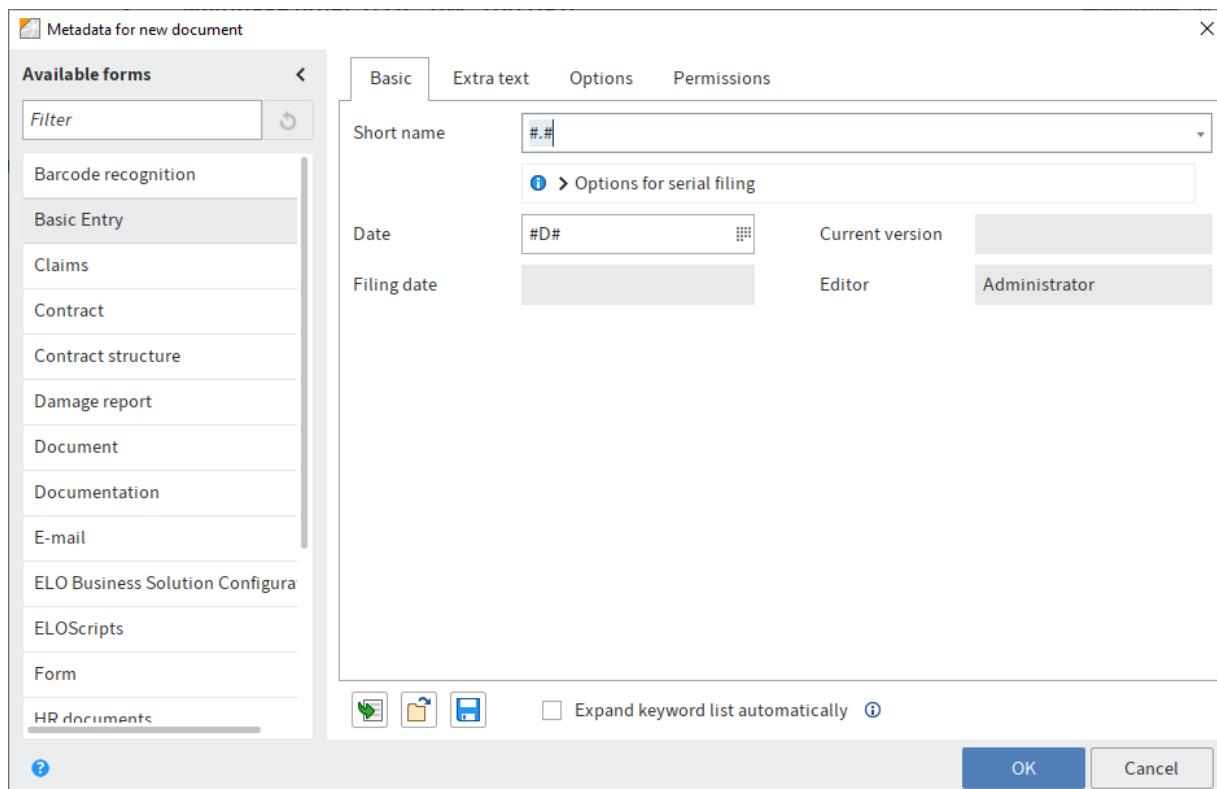
This function enables you to file multiple documents with the same metadata to ELO.

Requirements

There are several documents without metadata in your Intray.

Method

1. Open the *Intray* work area.
2. Select multiple documents by holding down the SHIFT key.
3. On the ribbon, click *File > Filing > Serial filing*.



The *Metadata for new document* dialog box opens.

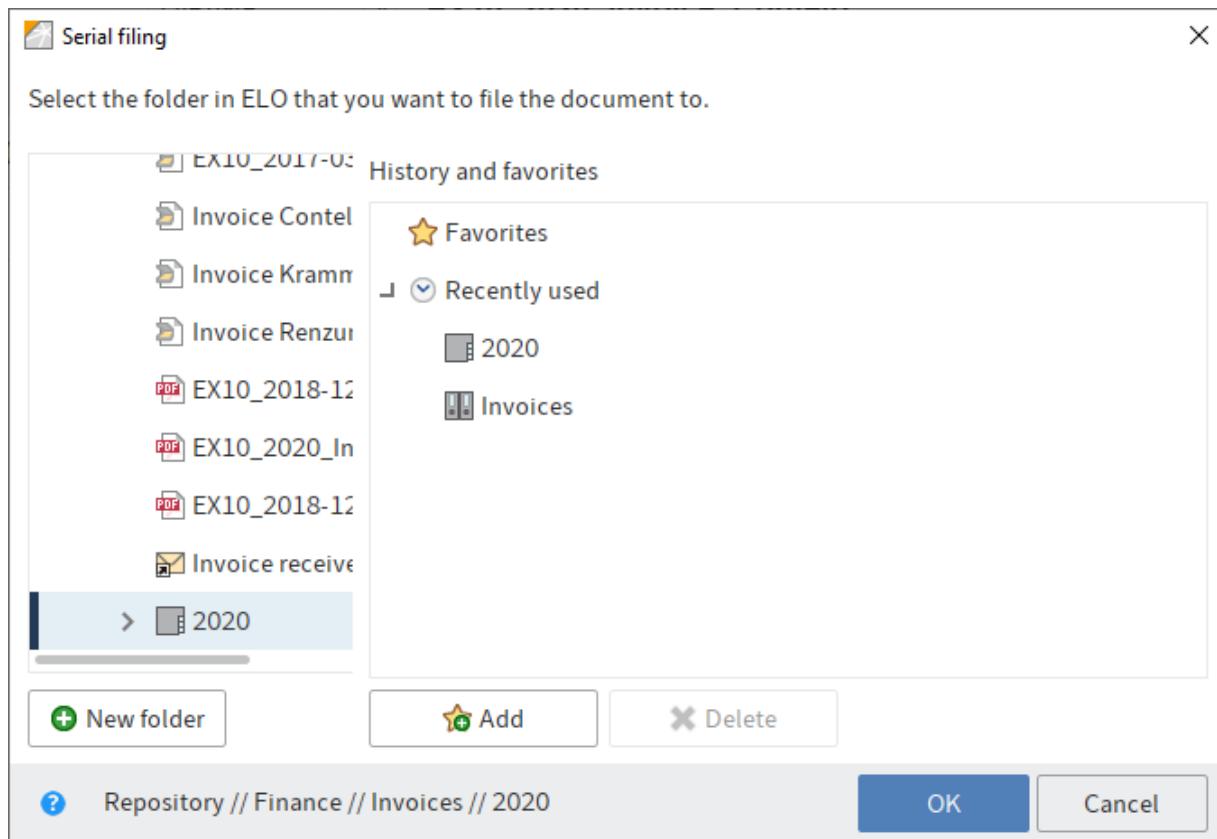
4. Define the settings for serial filing. For example, you can use variables to assign a consecutive number (###) during filing.

Information

You can find the possible variables in the tooltip below the short name or in the [Wildcards](#) section.

- 5.

Click *OK*.



The *Serial filing* dialog box appears.

6. Choose the folder in ELO that you want to file the documents to.

The following functions are available:

New folder: Use this function to create a new folder at the location selected in ELO.

Add: Use this function to create a new favorite. The favorites are listed under your *Favorites* and enable you to quickly select a filing location.

Delete: Removes a previously selected favorite.

7. Click *OK*.

Result

The documents are filed to ELO.

Wildcards

With serial filing, you can use the following wildcards in the short name and other fields.

Wildcard	Function	Event example
#.#	The file name is inserted.	Invoice ELO Count result Grenkeleasing
#F#	The file name is inserted with the file extension.	Invoice ELO.tif Count result.pdf Grenkeleasing.doc
#E#	The file extension is inserted.	tif pdf doc
#D#	The file date and the time are inserted.	2012-07-11 15:28 2020-06-26 11:31 2019-12-02 18:03
## or #1#	The document are numbered, starting with 1.	1 2 3
#001#	The document are numbered with three digits, starting with 001.	001 002 003
Image #1# #E#	The placeholders can be combined with any text and with each other.	Image 1 png Image 2 jpg Image 3 gif

New version

Available in: *Intray > Ribbon > File > Filing*

Use this function to create a new version of a document from the *Intray* work area in the *Repository* work area.

Information

You cannot create a new version for a locked or deleted document.

Attach pages

Available in: *Intray > Ribbon > File > Filing*

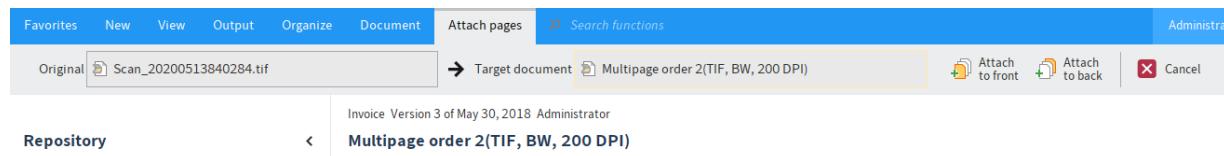
Information

Alternatively, the same function is also available when you drag a TIFF or PDF file to the repository and drop it on another TIFF or PDF document.

Use this function to add a TIFF or PDF document selected in the *Intray* work area to a document in the *Repository* work area.

Method

1. Select a TIFF or PDF document in the *Intray* work area.
2. Click *File > Filing > Attach pages*.



The *Attach pages* clipboard opens.

3. Select the TIFF or PDF document in the *Repository* work area that you want to attach the pages to.
4. To attach the original document at the beginning of the target document, click *Attach to front*.
To attach the original document at the end of the target document, click *Attach to back*.

Result

The pages are added.

Send to another Intray

Available in: *Intray > Ribbon > File > Transfer*

This function enables you to send a document to one or multiple users. You can select whether to keep a copy of the document in your *Intray* after sending.

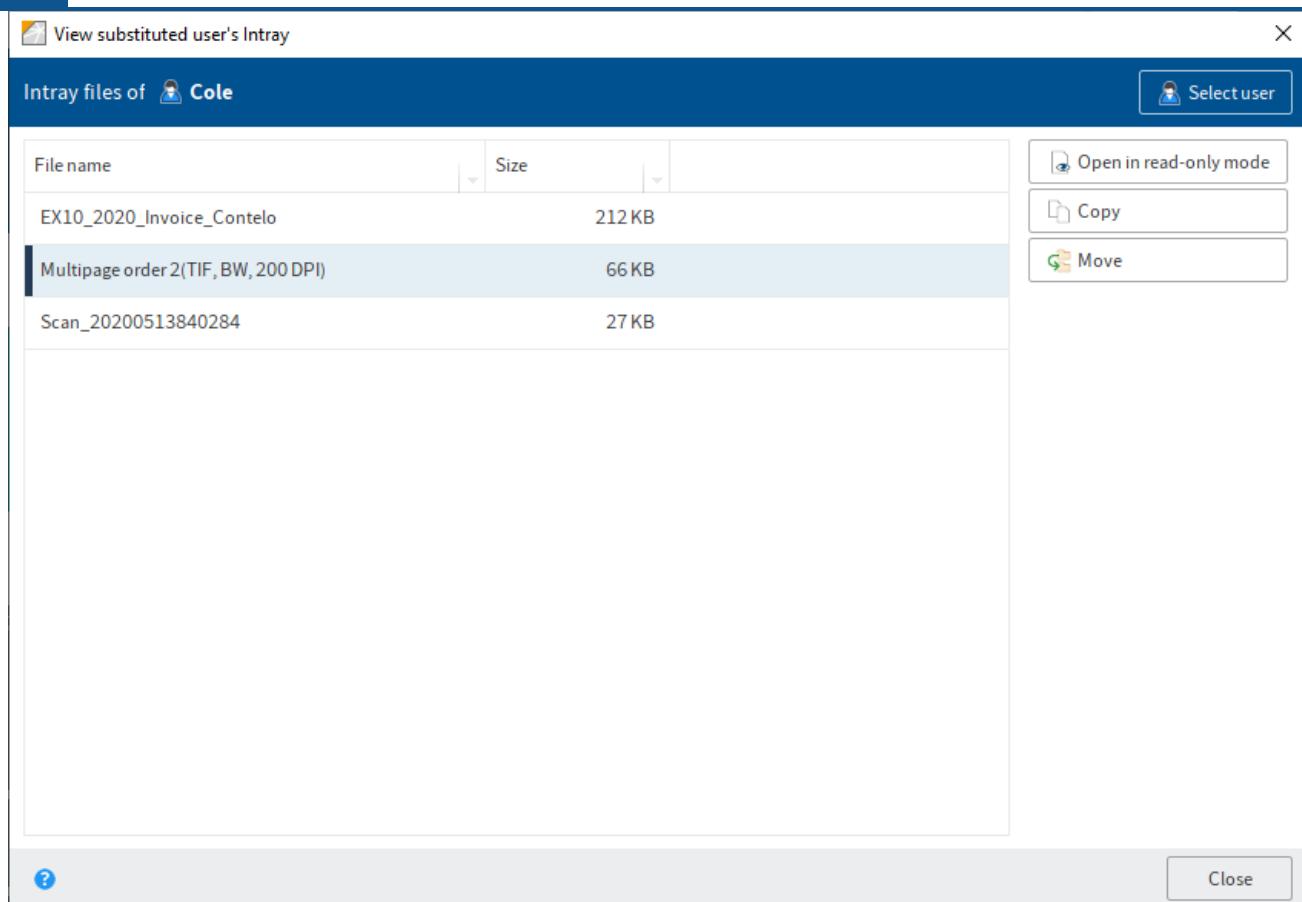
View substituted user's Intray

Available in: *Intray > Ribbon > File > Transfer*

The *View substituted user's Intray* function lets you manage items in another user's *Intray*. You must be an active substitute for that person.

Please note

If you want to view, copy, or retrieve documents from another user's *Intray*, these documents must already have been saved on the server. You can enable this setting under *User menu [your name] > Configuration > Advanced settings > Settings for the Intray work area > Save Intray on server when logging off*. If necessary, contact your system administrator.



Intray files of: You can see whose Intrays you are currently viewing in the *Intray files of* area.

Select user: Select the user whose Intray you want to access using the *Select user* button.

Open in read-only mode: Use the *Open in read-only mode* button to open the respective document.

Copy: Click the *Copy* button to create a copy of the selected document in your own Intray. The original document remains in the Intray of the user you are actively substituting.

Move: Click *Move* to retrieve the selected document and move it to your own Intray. The document is removed from the Intray of the user you are actively substituting.

Information

You can make multiple selections when copying or moving documents by holding down the CTRL key.

You will find more information on the topic of substitution in these chapters:

- Accept substitution
- Show substitution tasks
- Assign substitute

Delete

Use this function to permanently delete the selected document from the Intray.