Client administration

ELO Desktop Client

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ELO Desktop Client administration

Introduction

The goal of this documentation is to explain the administrative functions of the ELO Desktop Client.

Structure of the documentation

The first chapter provides information about installation.

We will then show you how to set up a connection with ELO.

In the Configuration chapter, you will learn how you can configure the client from the administrator's perspective and how to integrate WebDAV without SSO.

Target audience

This document is addressed to ELO Desktop Client administrators.

Separate documentation is available for users. The [user documentation](#) explains how the client works.

Installation

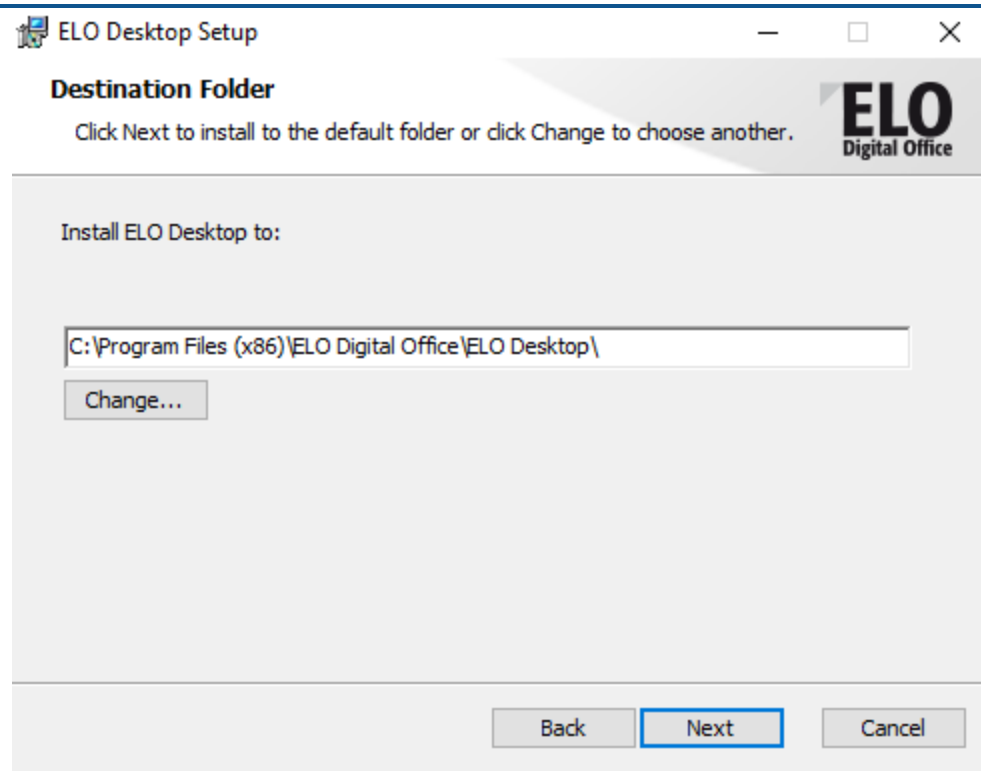This chapter describes the installation of the ELO Desktop Client.

Setup

Method

1. Double-click *setup.exe* to begin installation.

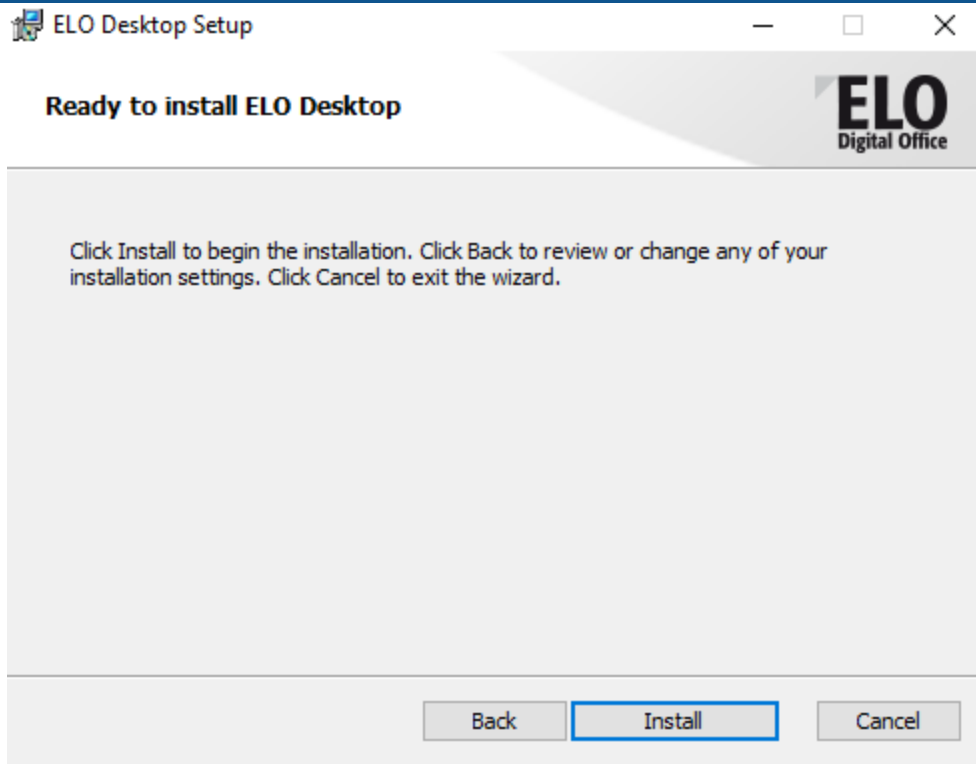The *ELO Desktop Client Setup* dialog box appears.

2. Click *Next* to continue.

The dialog box to select the installation directory appears.

Alternative: Click *Change* to change the suggested target directory and choose a different installation directory.
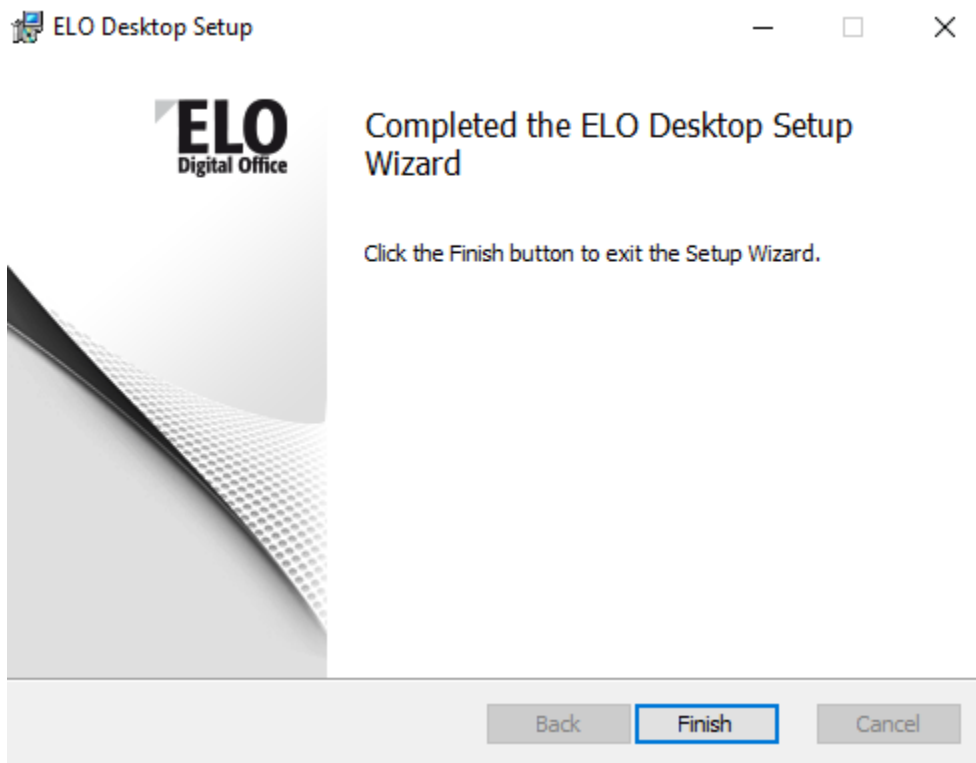
3. Click *Next* to continue.

The *Ready to install ELO Desktop Client* dialog box opens.

4. Click *Install*.

The ELO Desktop Client is installed by the setup wizard.

The setup wizard indicates when setup is complete.

5. Click *Finish* to complete setup.

Result

The ELO Desktop Client is installed.

Connect to ELO

Before working with the client for the first time, you have to establish a connection to ELO.

Create profile

For new installations, no connection is available. To connect to an ELO repository, you first have to create a profile. Profiles are managed in the configuration.
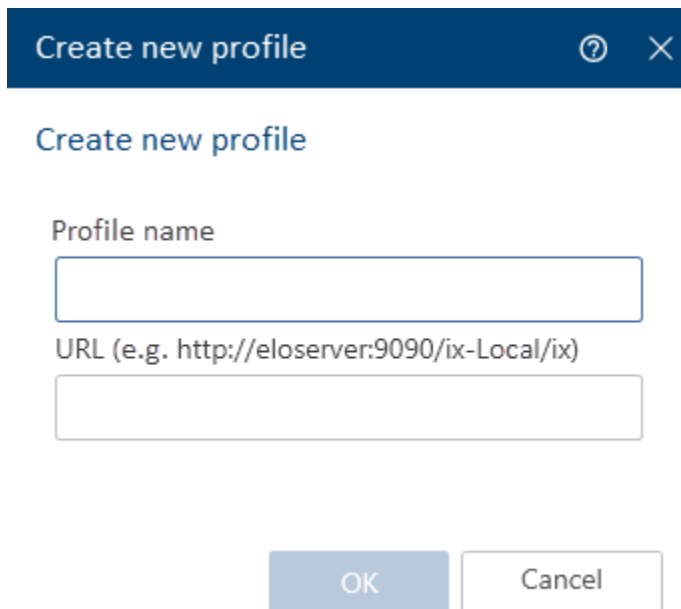
To connect to a repository, you first have to create a profile.

Profiles are managed in the configuration.

Create profile

Method

1. Click *Create profile*.

Create new profile

Create new profile

Profile name

URL (e.g. http://eloserver:9090/ix-Local/ix)

OK   Cancel

The *Create new profile* dialog box opens.

2. Enter the name of the repository in the *Profile name* field.

3.

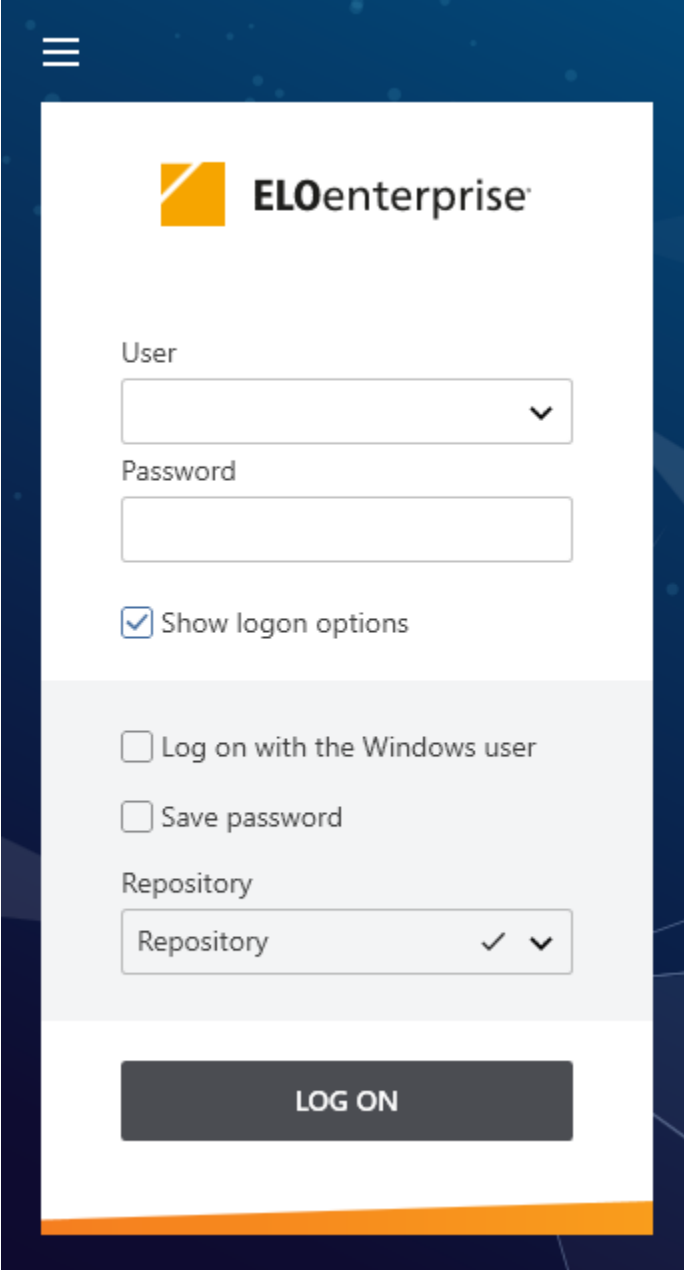Enter the Indexserver URL. It must follow this syntax: `https://<host>:<port>/ix-<repository name>/ix`.

If an operational Indexserver is found with the correct URL, the message *Server available* appears below the URL.

4. Click *OK* to create the profile.

Information

You will see your profile in the *Profile management* area. Click *Configuration > Administration*. The Configuration chapter explains how to manage your profiles.

Logon

Your profile is now available. Connect to ELO via the *Logon* dialog box.

Method

1. Enter your ELO user name in the *User* field.

2. Enter your ELO password in the *Password* field.

   Optional: If the *Show logon options* option is enabled, the logon options are displayed.

Optional: If the *Log on with the Windows user* option is enabled, the Windows user and Windows password are entered automatically. SSO (single sign-on) has to be set up in Windows first.

Optional: If the *Save password* option is enabled, you are logged in automatically the next time you start the ELO Desktop Client. You can save the password for each profile. To see what passwords have been saved, go to the *Administration* category under *Profile management* and click the key icon. You can also remove passwords here.

In the *Repository* area, you will see the name of the connected ELO repository. A checkmark next to the profile name indicates that the repository is available.

3. To connect to the ELO repository, click *Connect*.

Optional: The first time you log on to the repository, the *Functional roles* dialog box opens provided that your user account is assigned to a group.

> **Information**
>
> Functional roles allow you to use different sets of rights and permissions for different tasks. Groups can be defined as functional roles in the ELO Administration Console.

In this dialog box, you can choose which functional roles you want to enable. You can save your selection. The dialog box then no longer appears the next time you log on.

The *Enable roles* function in the *User menu [your name]* allows you to change the roles.

Result

A connection has been established with the ELO repository. The ELO Desktop Client tile navigation opens.

Configuration

In this chapter, you will learn how you can make changes to the configuration as an administrator. You will also find more information on integrating WebDAV without SSO and setting the ELO Desktop Client Plus right in the ELO Administration Console.

Making universal changes to the configuration

Settings in the configuration are always assigned to a specific user. If no settings have been made for the user, the option group settings for the groups the user is a member of are applied.

> **Please note**
>
> Option groups cannot be used to transfer permissions.

If there are no settings for the user in the option groups, the global settings take effect. If no options have been configured at the level of global settings, the preset client configuration is used.
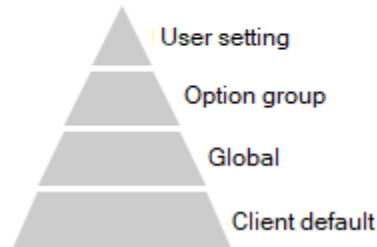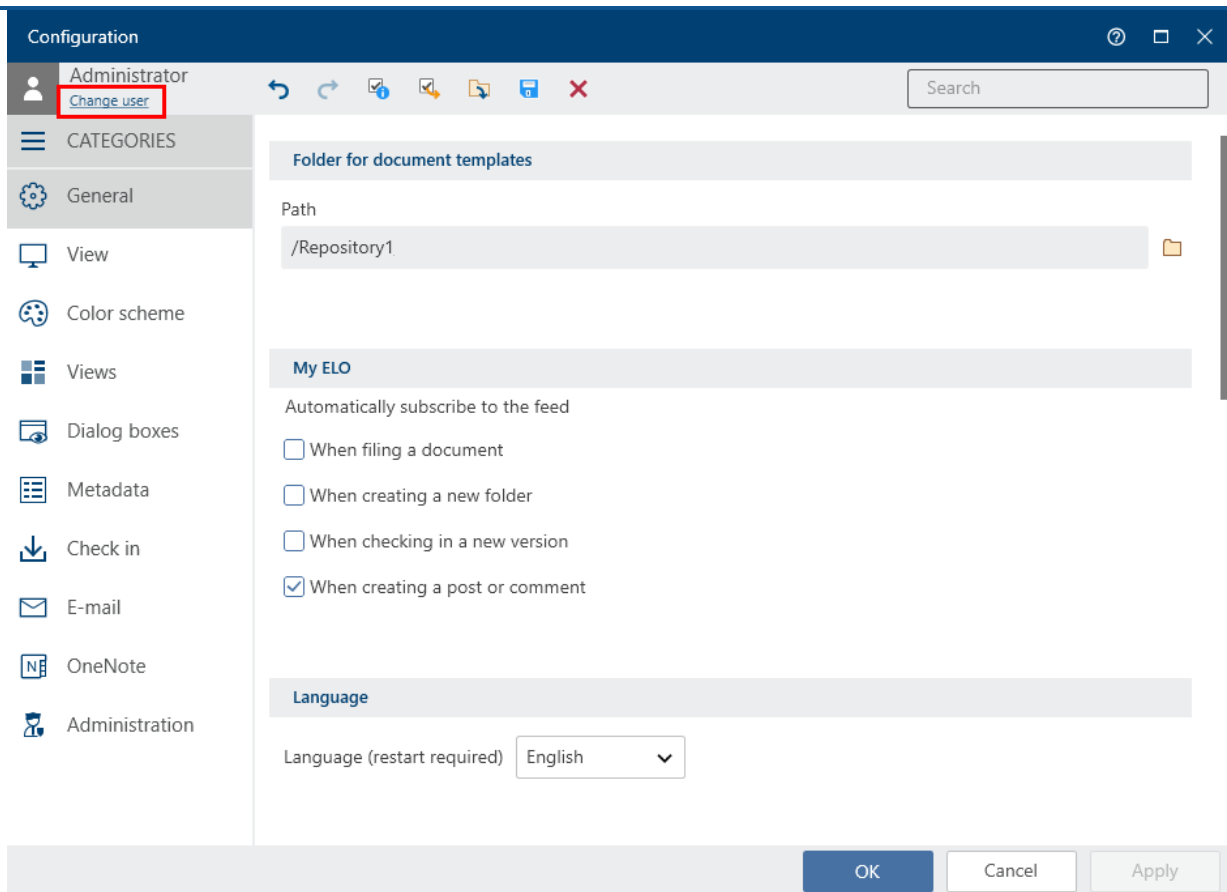

First, the settings are evaluated for the user, if settings have been applied there. Afterwards, the permission levels are evaluated in the order described above.
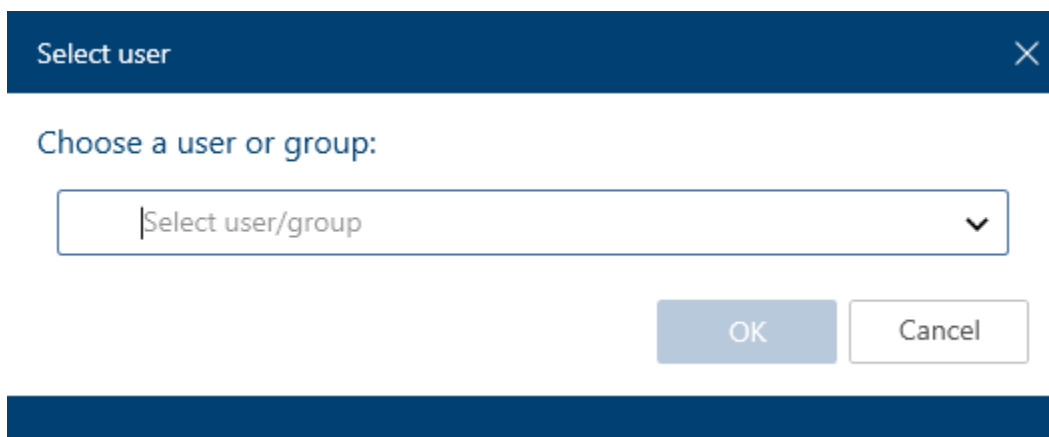
How can you check the settings for a level?

Method

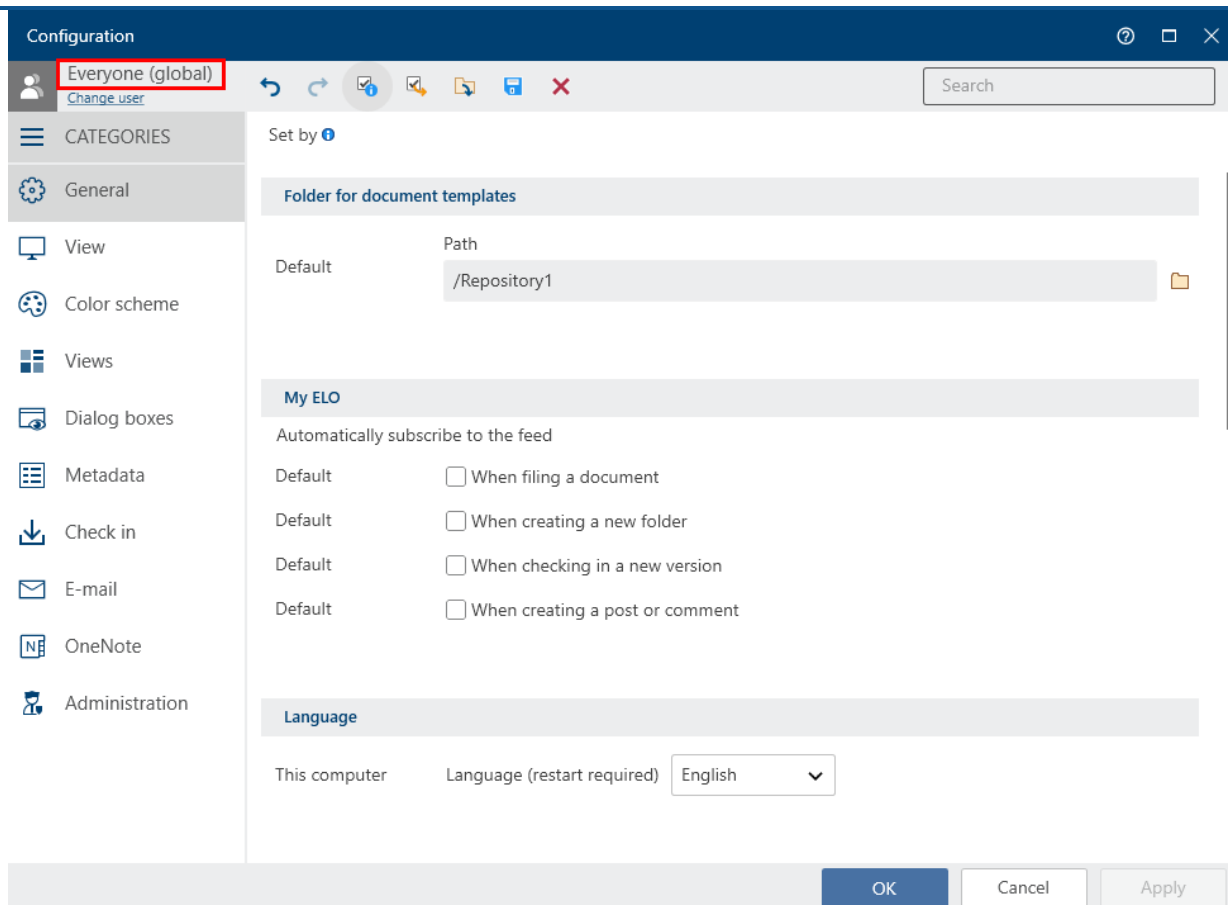1. As administrator, open the configuration from the drop-down menu in the header.

The *Configuration* dialog box opens.

2. Click *Change user*.

The *Select user* dialog box appears.

3. Select the desired user or group from the drop-down menu.

4. Click *OK*.

Result

The name of the selected user or group is now shown at the top left in the configuration.

A new column appears in the configuration next to the settings. The *Set by* column shows at what level changes have been made to settings. You can show and hide the *Set by* column using the button in the configuration header.

Transfer settings

In the example above, a specific path is set to default for the document templates in the *General* area. Change these settings for a specific user and select a different filing path.
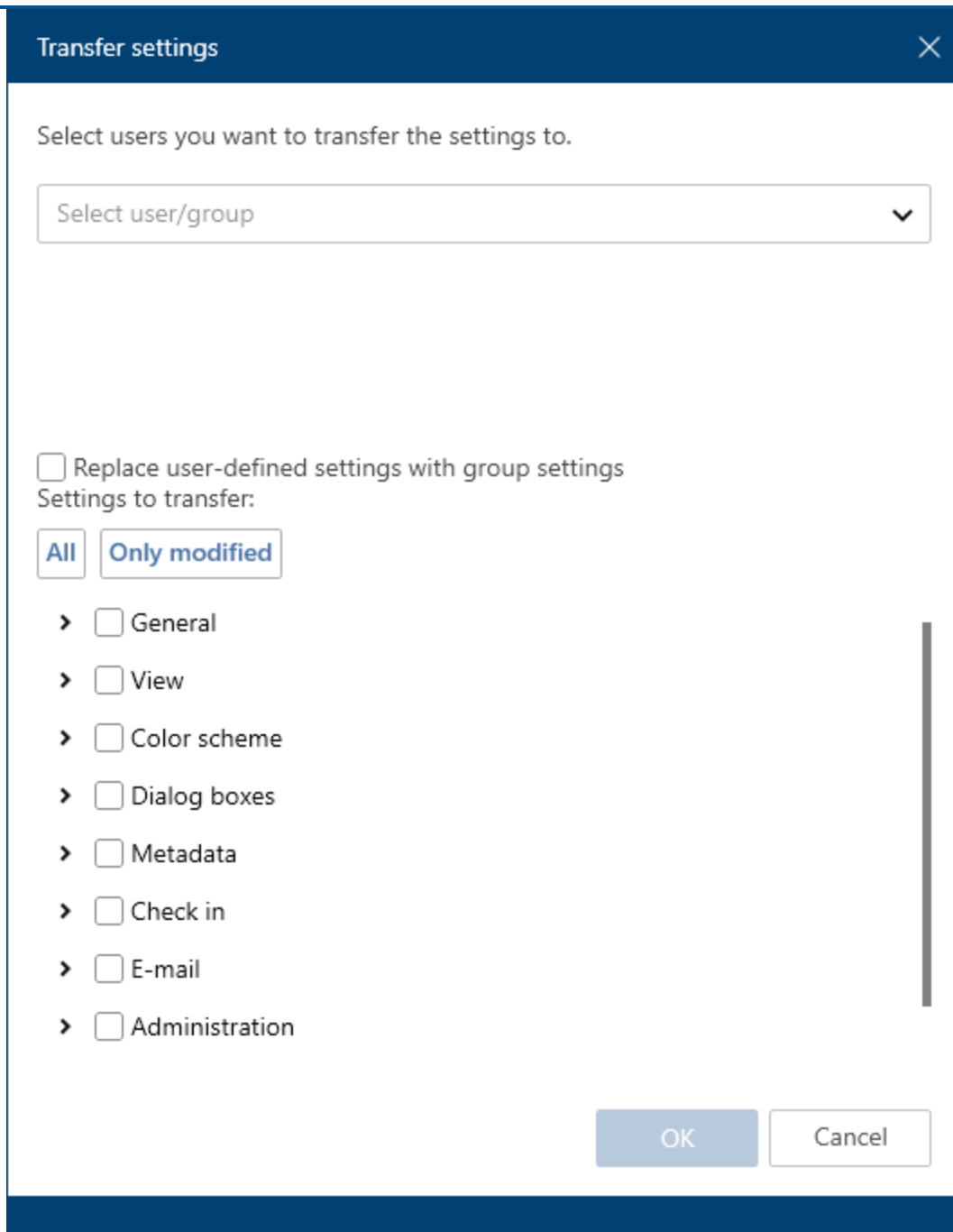
The setting for this option at the level of the *User* (see figure: *Levels concept in the configuration*) overrides all settings at all levels below it. You can delete the settings for the currently selected option group or user by clicking the X in the column.

You can transfer the current settings to other users by clicking the yellow arrow button in the configuration header.

Method

1. Click *Transfer settings* (yellow arrow).

Transfer settings   ✕

Select users you want to transfer the settings to.

    Select user/group   ⌄

    ☐ Replace user-defined settings with group settings
    Settings to transfer:

    | All | Only modified

        ❯ ☐ General

        ❯ ☐ View

        ❯ ☐ Color scheme

        ❯ ☐ Dialog boxes

        ❯ ☐ Metadata

        ❯ ☐ Check in

        ❯ ☐ E-mail

        ❯ ☐ Administration

                                                        OK   Cancel

The *Transfer settings* dialog box opens.

2. First, select the users or option groups you want to transfer the settings to from the drop-down menu. You can select multiple users or groups. They are shown in a list. Remove individual users or groups by clicking the *x* button.

   Optional: To replace user-defined settings with group settings, check the corresponding box.

3. To transfer all settings, click *All*.

   Alternative: To only transfer the settings changed by the user, click *Only modified*.

Optional: Check the settings you want to transfer. You can transfer individual areas of the configuration by checking the corresponding boxes. Alternatively, you can select individual settings separately by expanding the areas.

4. To transfer the settings, click *OK*.

Load settings

To open a saved configuration profile, click *Load existing settings for the configuration* (folder icon at the top in the configuration header) and select a user profile file from the Windows file system in the *Open* dialog box.

Save settings

You can save the configuration to your Windows file system.

Method

1. Click the floppy disk icon in the header of the configuration to save the configuration settings as an XML file.

The *Export settings* dialog box opens.

2. To select all settings, click *All*.

   Alternative: To only select the settings changed by the user, click *Only modified*.

   Optional: Check the settings you want to export. You can export individual areas of the configuration by checking the corresponding boxes. Alternatively, you can select individual settings separately by expanding the areas.

3. To export the settings, click *OK*.

4. Select the path and file name on the Windows file system and click *Save*.

Result

The configuration profile is saved to the Windows file system as an XML file.

Integrate WebDAV without SSO

If single sign-on (SSO) is not available for ELO Indexserver, you will have to change a setting in the *WebClient* Windows Service for WebDAV integration (*Connect ELO as a drive* function).

Method

1. In Windows, open the *Registry Editor* desktop app.

2. In the registry, navigate to the following key:

   ```
   HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\WebClient\Parameters
   ```

3. Create a new DWORD value named *BasicAuthLevel* if it does not already exist.

   BasicAuthLevel has the following values:

   - 0: authentication with user name/password disabled
   - 1: authentication with user name/password only for SSL WebDAV directories
   - 2: authentication with user name/password only for SSL WebDAV directories

   Important

   Setting the value 2 for *BasicAuthLevel* can enable potential hackers to steal passwords, as the authentication process is not encrypted.

4. If you can connect to ELO Indexserver via HTTPS, change the value to 2. If only HTTP connection is possible, change the value to 1.

5. Close the registry editor.

6. In Windows, open the *Services* app.
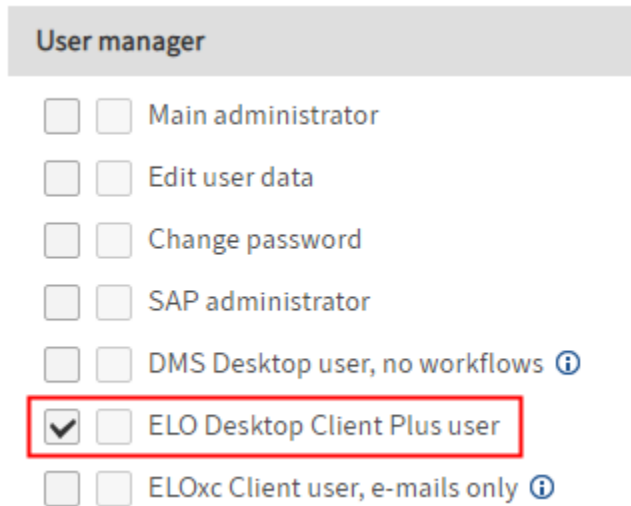
7.

Select the entry *WebClient* and restart the service.

Result

Your changes are applied. The *Connect ELO as a drive* function is now available.

Configure the ELO Desktop Client Plus right

ELO Desktop Client Plus users require an appropriate license.

As administrator, set the right in the ELO Administration Console under *User manager*.

Check the box next to *ELO Desktop Client Plus user*.

The next time the user logs on, the ELO Desktop Client includes an additional view and functions in the *Tasks* area.