

ELO mobile apps

ELO app (Android)

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Basics

With the ELO app, you can access your company's ELO repository using a mobile device. The app offers quick access to your documents and all associated details. You can capture and file documents while out of the office and search for information in ELO.

The ELO app does not replace the desktop version of ELO, but is designed to complement it. To get the most out of the ELO app, you should already be familiar with the basic functions of ELO software as well as your device.

The ELO app is optimized for use on tablets in landscape mode. This manual explains how to use the app with a tablet. It may look different on your device.

Installation and getting started

Requirements

The following requirements apply for the installation and use of the ELO app:

- Android 7 or higher installed on the mobile device
- ELO Web Client 11.00.000 or higher installed on the ELO server and configured for use on the Internet. For more information, refer to the *ELO Web Client Internet Access* developer documentation.
- Active Internet connection for unrestricted functionality.

Please note

HTTPS is essential for secure communication, as sensitive data is sent over the network. Without SSL/TLS encryption, third parties could intercept this data.

Install app

You will find the ELO app in the *Google Play Store*.

Method

Tap *Install* to begin installation.

Result

The app is installed on your device automatically.

Start app

Method

To start the ELO app, tap the app icon on your device's start screen.

Result

The ELO app starts.

Create account

When starting the app the first time, you will be asked whether you want to create a demo account or log on with an existing account.

You can use the demo account to familiarize yourself with the app. The demo account has restricted functions without write rights. To create a demo account at a later point in time, tap the *CREATE DEMO ACCOUNT* button in the action bar of the *Configuration* dialog box.

To access your company repository, you need to set up your ELO user account in the ELO app. Tap *Log on with existing account*. You can find more information in the section [Add account](#).

Language

The ELO app automatically uses your device's language settings. If the ELO app does not support your language, it uses English as the default.

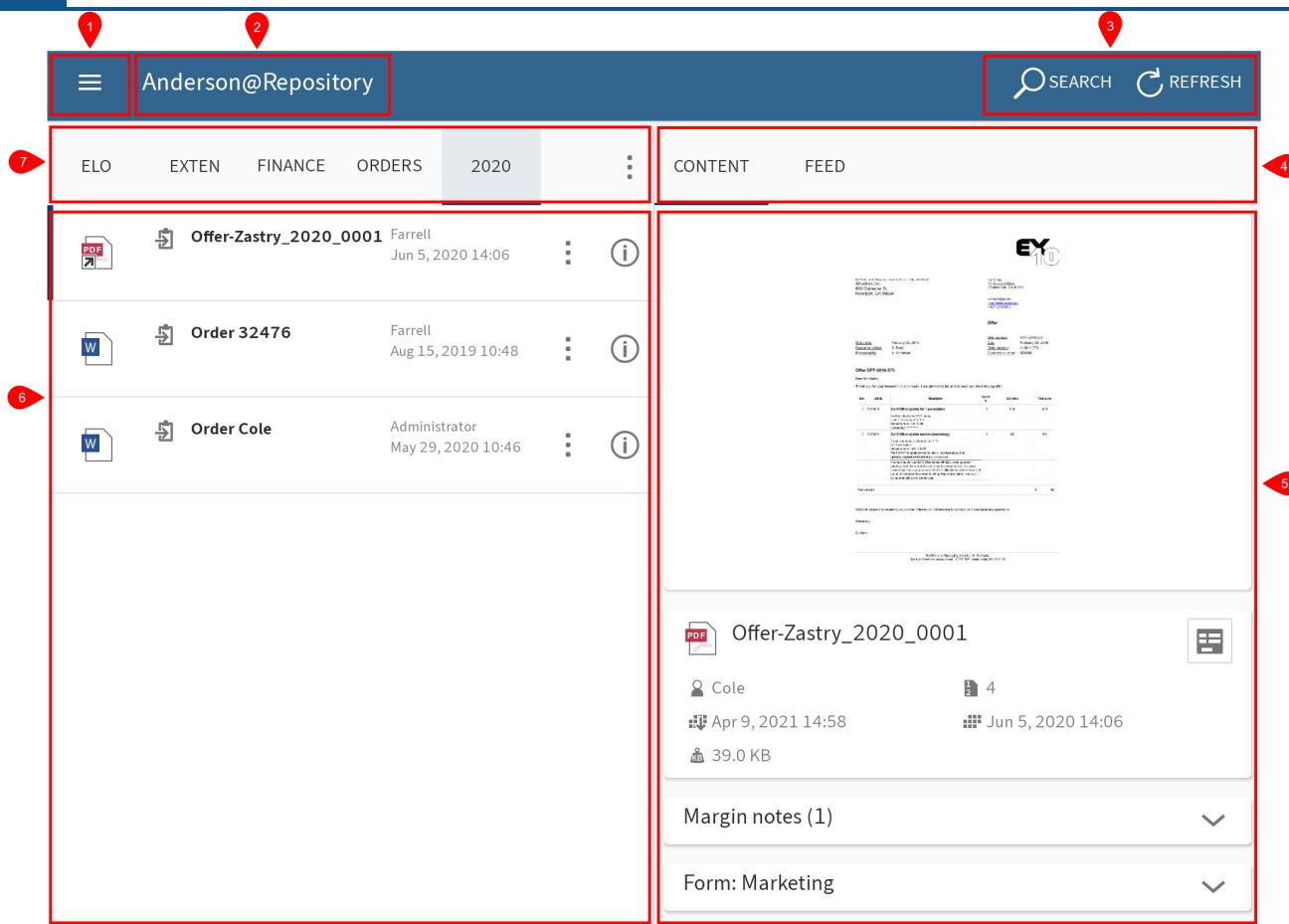
User interface

This documentation describes the user interface in landscape mode on a tablet. It may look different on your device.

The user interface may differ depending on the work area and the function being used.

Layout

The user interface is divided into two main areas: the list view and the viewer pane.



1 Menu (button with three dots): Opens the tile navigation.

2 Menu bar: Depending on the context, it shows the active account, the selected document, or a search field.

3 Action bar: In this area, you can call various functions.

4 Viewer pane navigation bar: Shows different tabs such as *Content*, *Feed*, or *Search settings* depending on the entry selected and function performed. The current tab is highlighted in blue.

5 Viewer pane: Shows a preview of the selected entry and detailed information.

6 List view: Shows the documents and folders available at the selected level.

7 List view navigation bar: The tabs show the levels of the *Repository* work area. The current level is highlighted in blue.

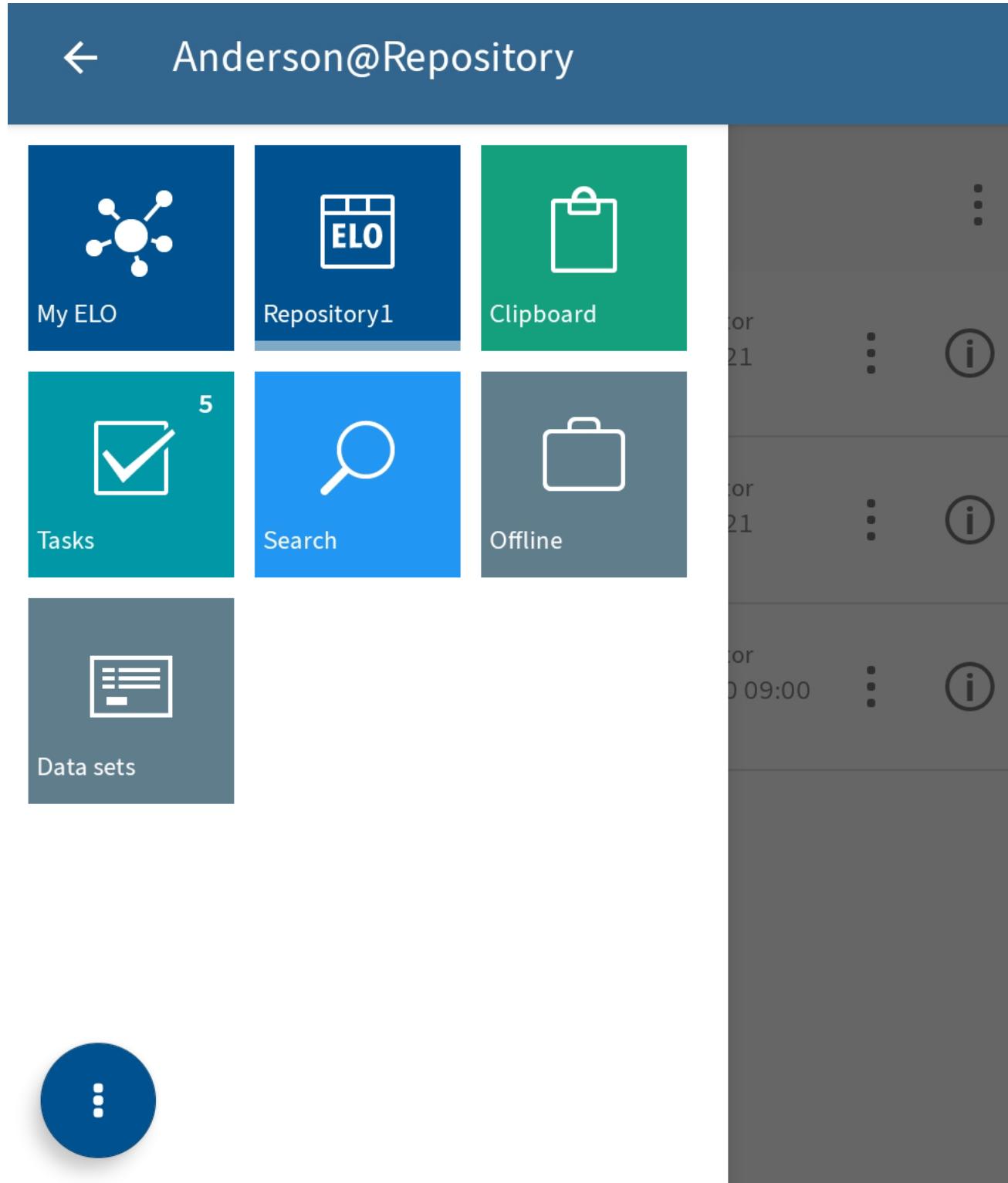
Tile navigation

The ELO app has different work areas. The tile navigation contains an overview of the work areas. From here, you can switch to other work areas and open the *Configuration* dialog box.

Information

Administrators can restrict which work areas users are able to see via the ELO Administration Console.

You can access the tile navigation from the menu (button with three dots) or by swiping your finger from the left towards the right edge of your screen.



The tile navigation contains the following work areas:

- My ELO: Shows news from subscribed feeds as well as information on tasks and workflows.
- Repository: Contains all folders and documents that you can access.
- Clipboard: The *Clipboard* work area is a temporary list of documents and folders.
- Tasks: This work area contains your tasks and workflows.
- Search: Enables you to look for specific entries in ELO.
- Offline: You can download entries to your Offline area to make them available on your device.
- Data sets: Data sets are saved temporarily here. Depending on your settings, they are uploaded to the *Repository* work area as soon as your device is connected to the Internet.

Information

Administrators can add new work areas with embedded web pages to the tile area via *ELOwf > App Manager > Add Client Info*.

Tile navigation context menu

From the tile navigation context menu (button with three dots), you can go straight to the configuration or the ELO in-program help.

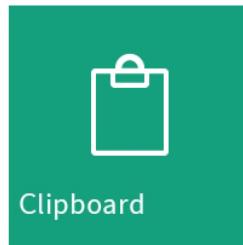
Anderson@Repository



My ELO

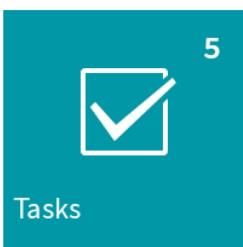


Repository1

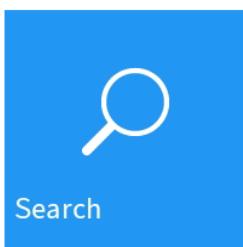


Clipboard

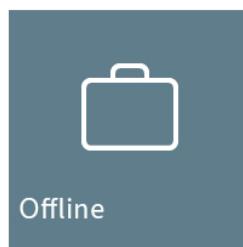
2020



Tasks



Search



Offline

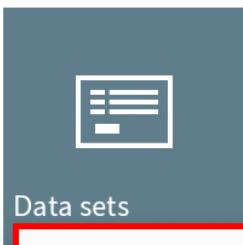
014:06



19 10:48



or
20 10:46



Data sets

Background processes

Configuration

About

Help

Company Information

Privacy Policy



The tile navigation context menu contains the following items:

- Background processes: Here, you will find an overview of running background processes. Background processes are started when forms are loaded or data is copied, for example.
- Configuration: In the *Configuration* dialog box, you can adjust the settings for the ELO app.
- About: Here, you will find information about the ELO app, such as the version number.
- Help: Tap the *Help* button to open the ELO in-program help in an external browser.
- Company Information: This button opens the *Company Information*.
- Privacy Policy: You will find the *Privacy Policy* here.

Navigation

When you first start the app, you will be in the *Repository* work area.

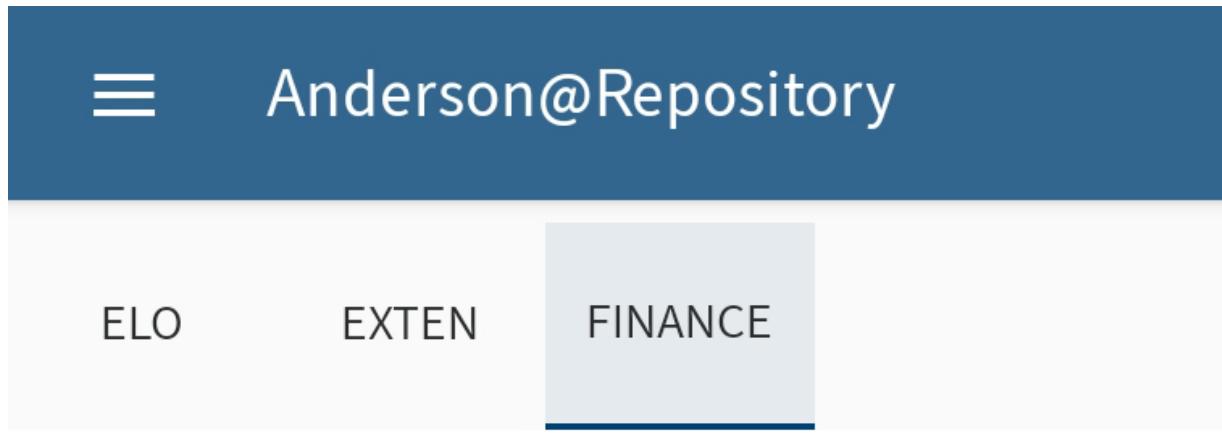
Change folder

Method

1. To switch to another folder, tap the folder you want to open in the list view.

A new tab appears in the list view navigation bar with the folder you opened. The tab of the current folder is marked in blue.

You can now access the entries in this folder.



2. To switch between the folders, tap a tab in the list view navigation bar.

Alternative: Swipe left or right to switch between the folders.

Scroll

If it is not possible to display all entries at once, you can scroll up and down in the list view, viewer pane, menus, and dialog boxes. Swipe up or down on the screen to scroll.

Go to

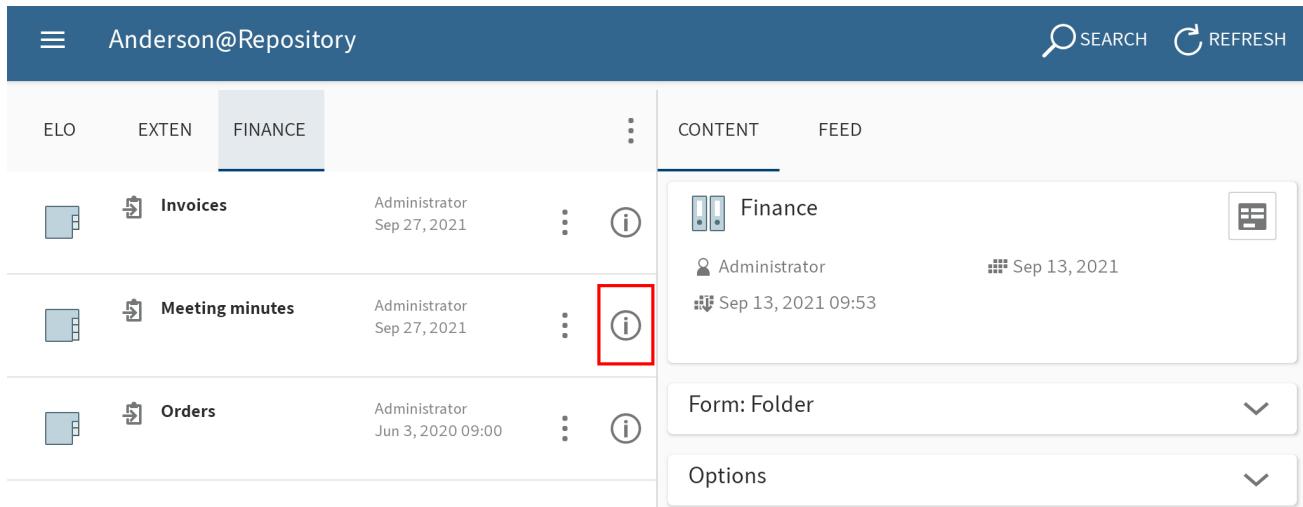
The GO TO function takes you straight to the location of a document or folder in the *Repository* work area.

You will find the *GO TO* button in the context menu for all work areas except for *Data sets*.



Show details

You can display detailed information on folders and documents in the viewer pane.



To view detailed information about folders or documents, tap the information icon next to the entry in the list view.

Alternative: To show the detailed information for documents, tap the entry in the list view.

The detailed information is then displayed in the viewer pane, along with any margin notes and attachments.

Tabs in the viewer pane

Depending on the selected work area, the viewer pane navigation bar will contain different tabs:

- Content: In this tab, you will see a preview of PDFs, scans, and image documents. You will also see the metadata for the selected folder or document as well as margin notes and options.
- Feed: The feed documents changes made to entries. You can create and comment on posts. You can also open the entry's metadata.
- Search settings (only in the *Search* work area): You can customize your search here.
-

Saved values (only in the *Data sets* work area): Shows information on a data set.

Switch between tabs in the viewer pane

You can switch between the different tabs. The current tab is underlined in blue.

Method

Tap the tab you want to open in the viewer pane navigation bar.

Alternative: Swipe left or right to switch between the tabs.

Result

The selected tab is underlined in blue in the navigation bar of the viewer pane.

Show/hide additional detail areas

On some tabs of the viewer pane, the detail areas are hidden for optimized display. Initially, you only see the names of the available detail areas (e.g. *Form* and *Options*). You will recognize detail areas you can hide or show based on the up or down arrow icon. To show or hide details, tap the detail area.

Show e-mails

In the *Message* detail area in the viewer pane, you will see a text preview of filed e-mails.

If an e-mail filed to the repository contains attachments, you will find them in the *Attachments* detail area.

Method

To open an attachment, tap the eye icon to the right of the attachment.

Information

An application for opening the attached files must be installed on your Android device.

Result

The attachment is opened in an external application.

Use the Android *Back* button to return to the ELO app.

Context menu

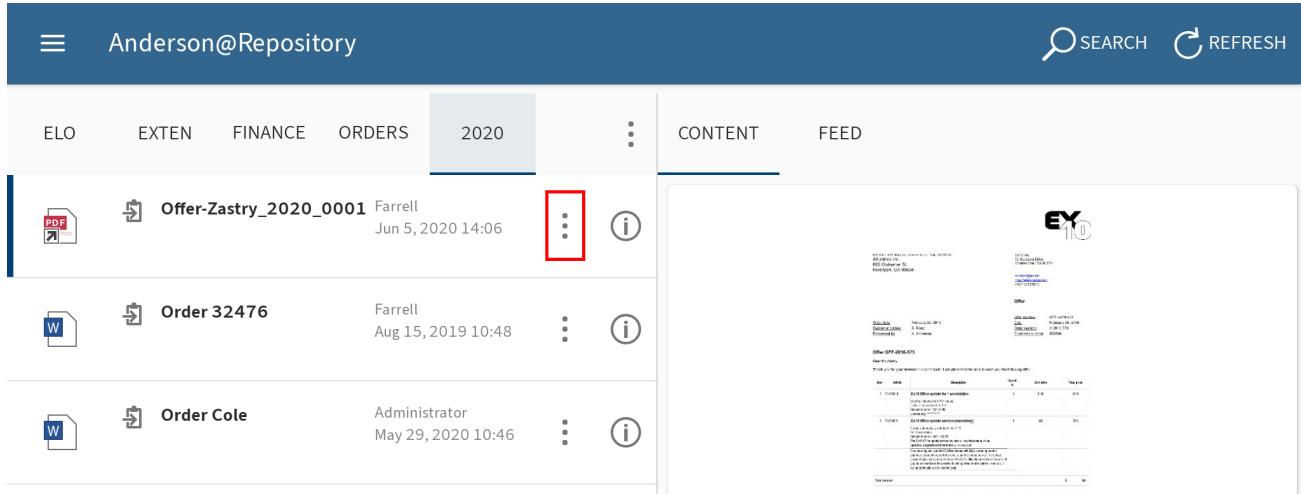
You can call up additional functions for individual documents or folders via the context menu. Various functions are available depending on the type of entry and work area.

Information

Administrators can restrict which functions users are able to see via the ELO Administration Console.

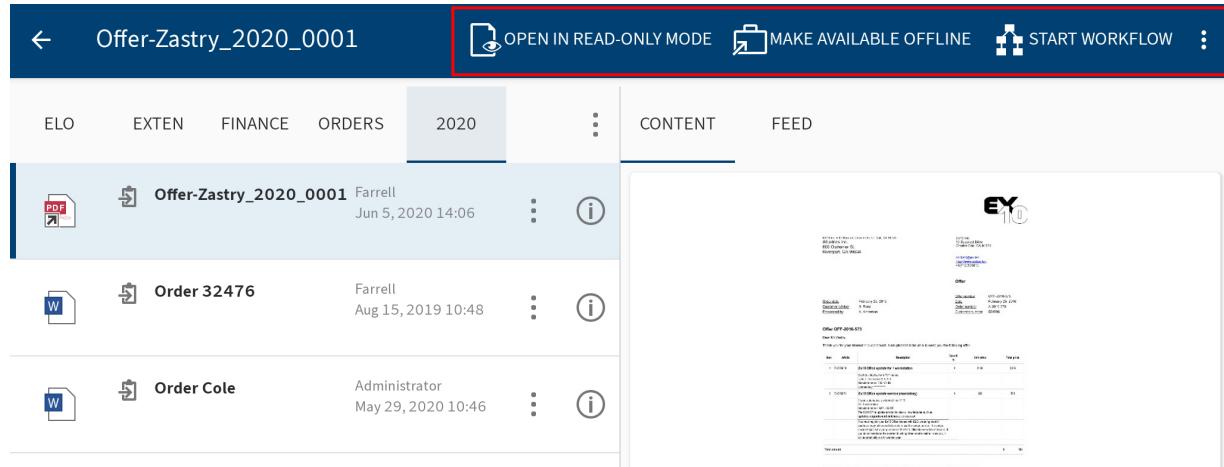
Open context menu

Method



1. Tap the context menu (button with three dots) next to an entry in the list view.

Alternative: Long tap the desired entry and until the context menu appears.



The selected entry is highlighted in blue. The context menu appears in the menu bar.

2. Tap the function you want to use.

Result

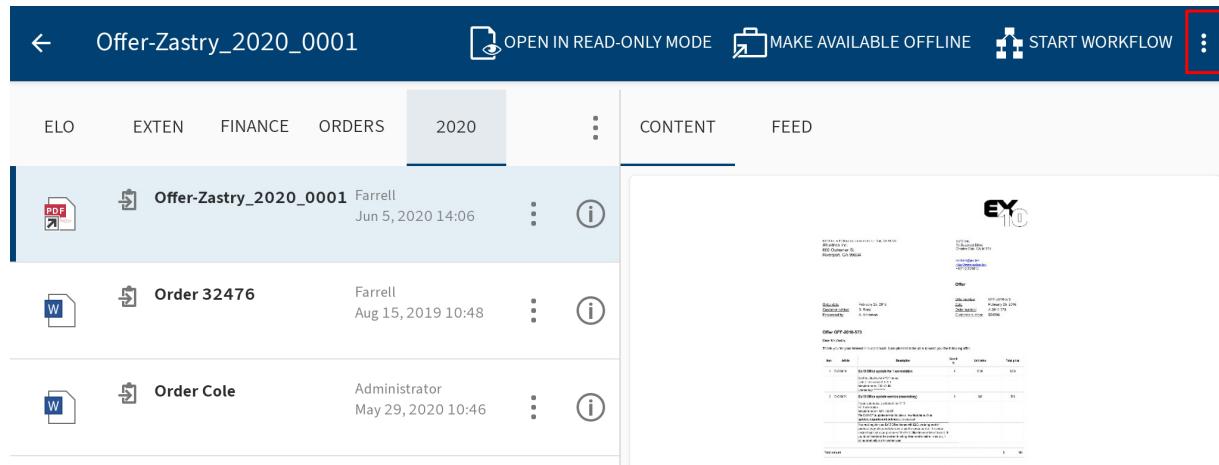
The function is performed.

Call additional functions

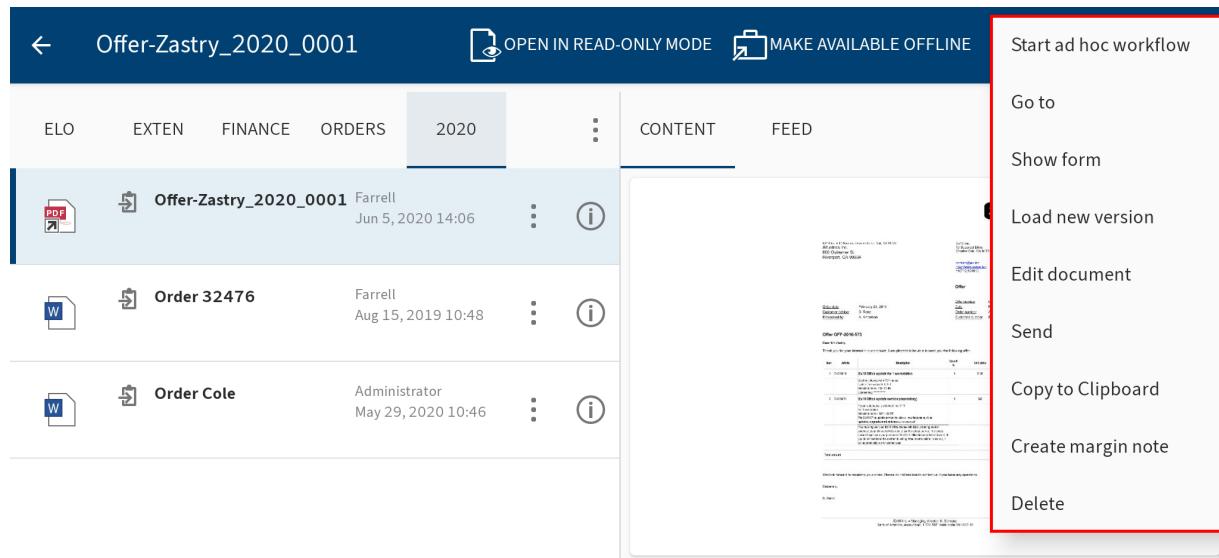
Buttons from the main action bar may be moved to a drop-down menu depending on the width and orientation of the screen used. You can open them from the menu (button with three dots).

Method

1. Open the context menu for an entry (button with three dots).



2. In the context menu, tap the menu (button with three dots).



A drop-down menu appears.

3. Tap the desired function.

Information

Some Android devices have a menu key. In this case, the menu (button with three dots) is not displayed, but replaced by the menu key on your device.

Multiple selection

In the list view, you can select multiple entries at once.

Method

1. Open the context menu for an entry (button with three dots).
2. In the list view, tap the entries you want to select.

Result

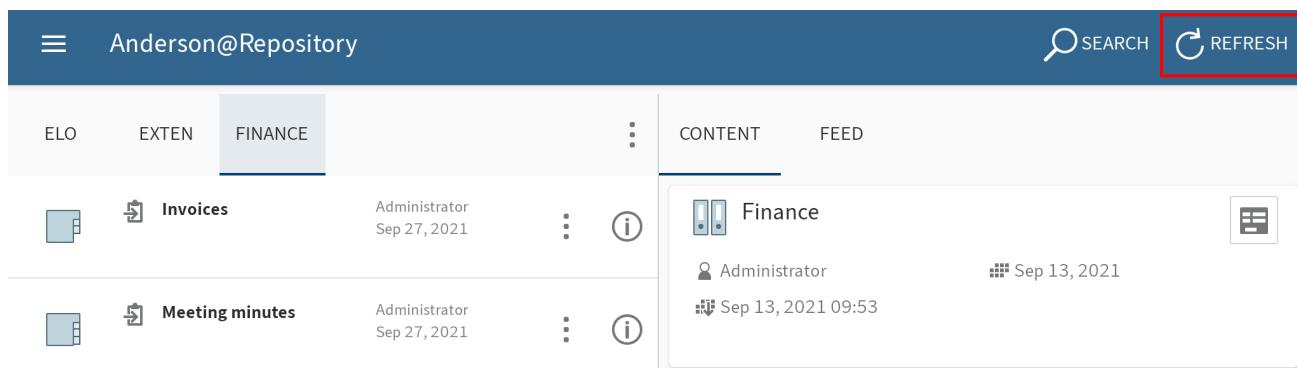
The selected entries are marked in blue.

In the menu bar, you will see how many entries you have selected and what functions are available for selection.

Refresh

Tap the *REFRESH* button to refresh the list view in the selected work area.

You will find the *REFRESH* function in the context menu.



Configuration

In the *Configuration* dialog box, you can change the general settings for all accounts as well as individual settings for each individual account. You can open the configuration from the context menu for the tile navigation.

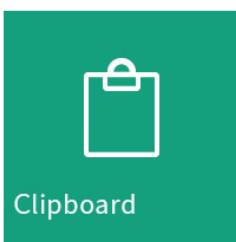
← Anderson@Repository



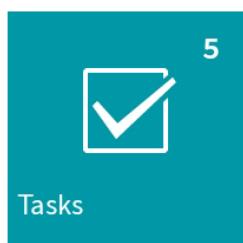
My ELO



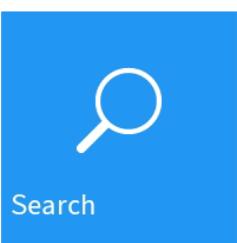
Repository1



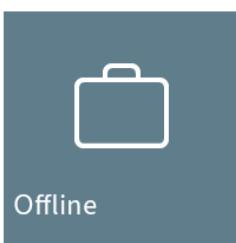
Clipboard



Tasks



Search



Offline



Data sets

Background processes

Configuration

About

Help

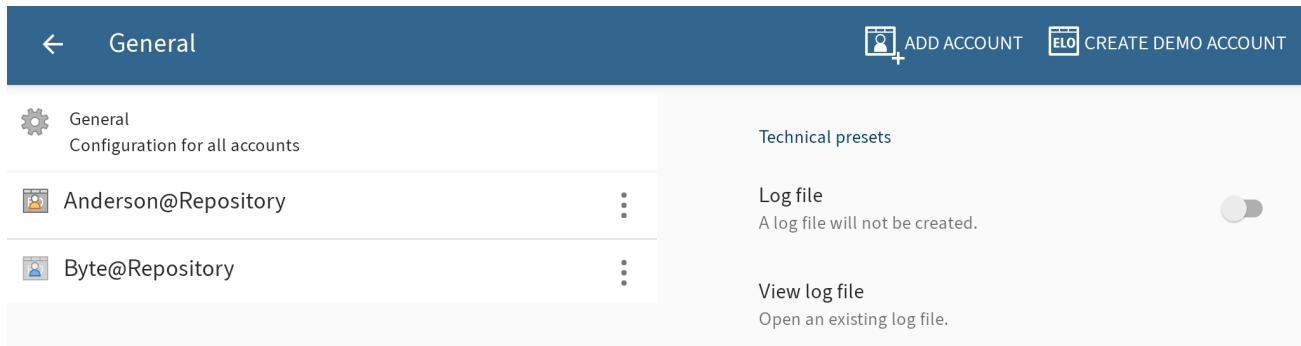
Company Information

Privacy Policy



General: Configuration for all accounts

When you open the configuration, you will see the area *General: Configuration for all accounts*. This is where you define settings that apply for all accounts.



You can make the following settings:

- Log file: If this option is enabled, a log file is created on the device's external storage.
- View log file: To open an existing log file, tap *View log file*.
- Notify support: To send an e-mail to ELO support in an external application, tap *Notify support*. If a log file is available, it will be attached.
- Delete log file: Tap *Delete log file* to delete an existing log file.

Individual account settings

In addition to the general settings, which apply to all accounts, you can also apply settings for an individual account.

Method

Tap the account you want to make the settings for.

Result

The submenu for the selected account appears. The selected account is highlighted in blue. You can perform the following settings:

Local storage

Use external storage: Choose whether local files should be saved to an external storage medium, such as an SD card, or to the internal storage of the device. Externally saved files are available to other programs and users.

Please note

All local data is deleted when changing the storage location. This includes entries in the *Offline* and *Clipboard* work areas and data sets that have not yet been transferred to the repository.

Storage location for local data: If the *Use external storage* option is enabled, you can select a storage location (e.g. an SD card) for the local data.

Delete local data: Tap *Delete local data* to remove all data stored on the device or the external storage.

Cache

Delete cache directory: Tap *Delete cache directory* to delete all cache files of the active account.

Network

Automatic data set filing: Decide when data sets are automatically filed to ELO. Tap to open the following options:

- With any connection: The data sets are transferred as long as the device is connected to the Internet.
- Only over Wi-Fi: The data sets are only transferred if a Wi-Fi connection is established.
- No automatic filing: The data sets are not filed automatically.

Metadata

Before you can enter metadata for new folders or documents in the ELO app, your administrator has to create a form and link it to the metadata form.

Information

If a form has not been assigned to the metadata form, the ELO app loads a default form with the fields *Short name*, *Document date*, and *Extra text*. If a metadata form contains mandatory fields, your administrator will have to create a form and link it to the metadata form so it can be selected in the ELO app.

Enter metadata on filing: If you create a new folder or add a file, you can enter metadata for the entries directly. There are different options for entering metadata for new folders and documents. Tap to open the following options:

- Always use the form: If this option is enabled, you will always see a metadata dialog box when filing documents. The form assigned to the metadata form is used to enter the metadata. If a form has not been assigned, the system uses the default form with the *Short text*, *Document date*, and *Extra text* fields.
- Only for metadata forms with form: If this option is enabled, the metadata form will only appear if the selected metadata form is linked to a form. If a form has not been assigned, the new entry is automatically filed with the default form. The default form contains the *Short text*, *Document date*, and *Extra text* fields.
- Do not enter metadata: If this option is enabled, no metadata dialog box opens. The new entry is automatically filed with the default form. The default form contains the *Short text*, *Document date*, and *Extra text* fields.

Enter metadata on serial filing: There are different options for entering metadata when filing multiple documents. Tap to open the following options:

- Always use the form: If this option is enabled, you will always see a metadata dialog box when filing documents. The form assigned to the metadata form is used to enter the metadata. If a form has not been assigned, the system uses the default form with the *Short text*, *Document date*, and *Extra text* fields.
- Only for metadata forms with form: If this option is enabled, the metadata form will only appear if the selected metadata form is linked to a form. If a form has not been assigned, the new entry is automatically filed with the default form. The default form contains the *Short text*, *Document date*, and *Extra text* fields.
- Do not enter metadata: If this option is enabled, no metadata dialog box opens. The new entry is automatically filed with the default form. The default form contains the *Short text*, *Document date*, and *Extra text* fields.

Task settings

Sort order of the tasks lists: Choose how your tasks should be sorted. Tap to open the following options:

- Date/Priority/Name
- Name/Priority/Date
- Priority/Date/Name

Show group tasks: Choose whether group tasks should be displayed.

Show substitution tasks: Choose whether substitution tasks should be displayed.

Show escalations: Choose whether to display escalations for tasks.

Search settings

Specify which fields to include during a search. The following fields are available:

- Short name
- Extra text
- Fields
- Full text

Add account

To access your company repository, you must connect the ELO app to the repository. You need to set up an account first.

Please note

An account is only connected to one repository at a time. In order to access different repositories, you have to create multiple accounts.

The following options are available for setting up an account:

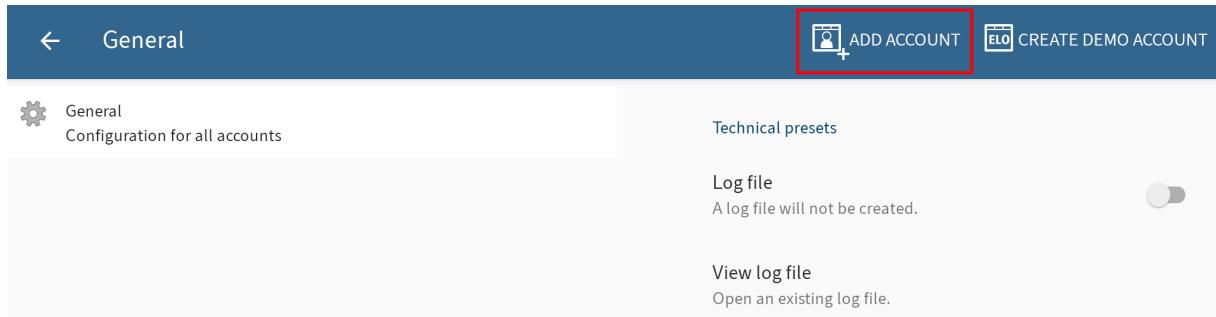
- If you want to create an account for yourself, use the [ADD ACCOUNT](#) function.
- If you want to create an account for another user as the administrator, use:
 - either an eloprofile file
 - or [Mobile device management](#).

'ADD ACCOUNT' function

If you want to create an account for yourself, use the *ADD ACCOUNT* function.

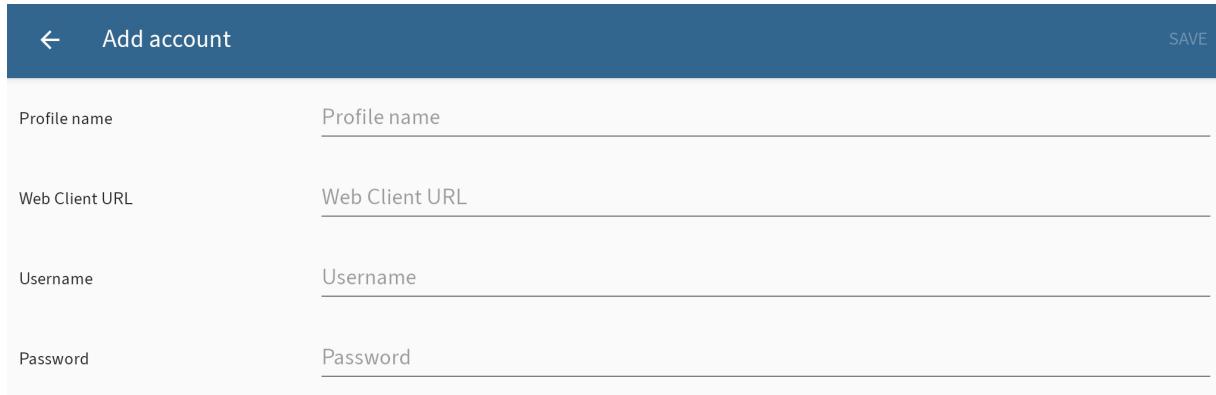
Method

1. Open the configuration via the *Tile navigation > Context menu*.



The *Configuration* dialog box opens.

2. Tap *ADD ACCOUNT* to create a new account.



The *Add account* dialog box appears.

3. Enter a name for the repository in the *Profile name* field. You can choose any name you like.
4. Enter the ELO Web Client URL for the repository you want to connect to the *Web Client URL* field. You must use the following pattern:

`http(s)://<server
name>:<port name>/ix-<repository name>/plugin/de.elo.ix.plugin.proxy/web`

- 5.

Enter your ELO user name to the *Username* field.

6. Enter your password to the *Password* field.

7. Tap **SAVE**.

Result

The new account is now connected to the ELO repository. You can tell that the account is active by the orange person icon. If you want to use another account, you have to activate it first.

Alternative

You can also create an account with an .eloprofile file. This file contains the account data in JSON format:

```
{  
  "name": "<repository name>",  
  "server": "http(s)://<server name>:<port name>/ix-<repository name>/plugin/de.elo.ix.plug  
  "user": "<user>",  
  "password": "<user password>"  
}
```

Send the eloprofile file to your mobile device, e.g. as an e-mail attachment. Select the ELO app to open the profile file. The account is created automatically. To use the account, you have to activate it. You can tell that the account is active by the orange person icon.

Mobile device management

If you want to create an account for another user as the administrator, you can use a mobile device management system.

To transfer user profiles to a mobile device, information, such as the server URL, has to be entered in the mobile device management system via a JSON editor. The JSON template for entering repository values is loaded right from the app. All you have to do is replace the variables with the relevant data.

Please note

This data is saved on the device unprotected. This means you should not enter any passwords or other sensitive data here.

Taking Microsoft Intune as an example:

The screenshot shows the Microsoft Intune 'Properties' page for an 'ELO 12 Android' app. The left sidebar has sections for Overview, Manage, Properties (selected), Assignments, Monitor, Device install status, and User install status. The main area shows the app's name, description, enrollment type (Managed devices), platform (Android), and configuration settings. The 'Configuration settings' section is expanded, showing 'Configured'. Below it are sections for Associated app (ELO 12 for Mobile Devices) and Permissions (Not configured). On the right, there is a JSON editor with a message: 'Use the JSON editor to configure the disabled configuration keys.' It includes a 'Download JSON template' button and a code editor window displaying the following JSON template:

```

1  {
2   "kind": "androidenterprise#managedConfiguration",
3   "productId": "com.elo.android.v12",
4   "managedProperty": [
5     {
6       "key": "account_configuration_list",
7       "valueBundleArray": [
8         {
9           "managedProperty": [
10             {
11               "key": "account_name",
12               "valueString": "René"
13             },
14             {
15               "key": "account_server",
16               "valueString": "https://efmd11.elo.com/web-Demo11/"
17             },
18             {
19               "key": "account_user",
20               "valueString": "René"
21             }
22           ]
23         }
24       ]
25     }
26   ]
27 }

```

At the bottom are 'Save' and 'OK' buttons.

If the template is not loaded automatically, you can enter it manually in the editor.

```

<?xml version="1.0" encoding="utf-8"?>
<restrictions xmlns:android="http://schemas.android.com/apk/res/android">

<restriction
    android:key="account_configuration_list"
    android:title="@string/restriction_account_configuration_list"
    android:restrictionType="bundle_array">
<restriction
    android:key="account_configuration"
    android:title="@string/restriction_account_configuration"
    android:restrictionType="bundle">
<restriction
    android:key="account_name"
    android:title="@string/accountdetails_profile"
    android:restrictionType="string"/>
<restriction
    android:key="account_server"
    android:title="@string/accountdetails_serverurl"
    android:restrictionType="string"/>
<restriction
    android:key="account_user"
    android:title="@string/accountdetails_username"

```

```
        android:restrictionType="string"/>
<restriction
    android:key="account_password"
    android:title="@string/accountdetails_userpwd"
    android:restrictionType="string"/>
<restriction
    android:key="account_delete"
    android:title="@string/accountdetails_account_delete"
    android:description="@string/accountdetails_account_delete_desc"
    android:restrictionType="bool"
    android:defaultValue="false"/>
<restriction
    android:key="account_keep_user_password"
    android:title="@string/accountdetails_keep_user_password"
    android:description="@string/accountdetails_keep_user_password_desc"
    android:restrictionType="bool"
    android:defaultValue="false"/>
</restriction>
</restriction>

</restrictions>
```

Edit account

If settings on the ELO server or your user data change, you may be required to edit the account.

Please note

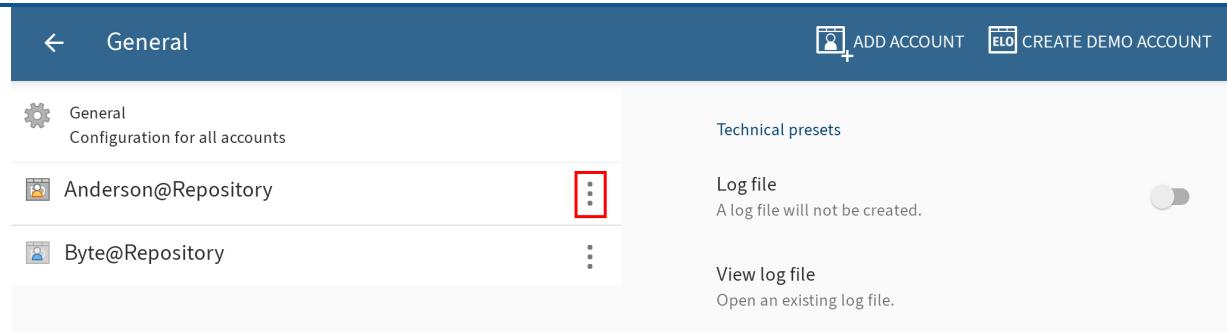
Making changes to an account deletes all local data on the mobile device. This includes entries in the Offline area, the Clipboard, forms, and form data sets that have not been transferred to the repository.

Information

You cannot change your password in the ELO app. You can change your password in the ELO Java Client or the ELO Web Client.

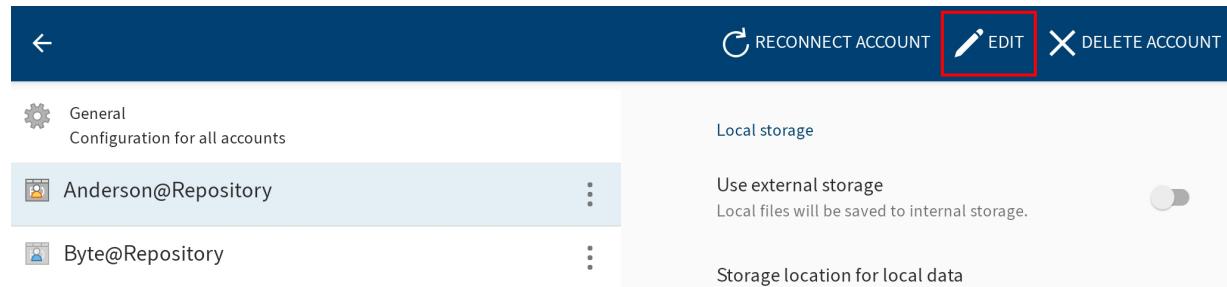
Method

1. Open the configuration via the *Tile navigation > Context menu (button with three dots)*.



The *Configuration* dialog box opens.

2. Tap the context menu (button with three dots) for the account you want to edit.



The context menu opens.

3. Tap *EDIT* in the context menu.

The *Add account* dialog box appears. The fields show the data for the selected account.

4. Make the desired changes.

5. Tap *SAVE*.

Result

The changes are applied in the ELO app. If the logon information is correct, you can access the repository again.

Switch account

You can create multiple accounts in the ELO app. You can tell that the account is active by the orange person icon. If you want to use another account, you have to activate it first.

Method

1. Open the configuration via the *Tile navigation > Context menu*.

General

General
Configuration for all accounts

Anderson@Repository

Byte@Repository

Technical presets

Log file
A log file will not be created.

View log file
Open an existing log file.

The *Configuration* dialog box opens.

2. Tap the context menu (button with three dots) for the account you want to activate.

General

Configuration for all accounts

Anderson@Repository

Byte@Repository

SET ACCOUNT TO ACTIVE

EDIT

DELETE ACCOUNT

Local storage

Use external storage
Local files will be saved to internal storage.

Storage location for local data

The selected account is highlighted in blue.

3. Tap *SET ACCOUNT TO ACTIVE*.



Result

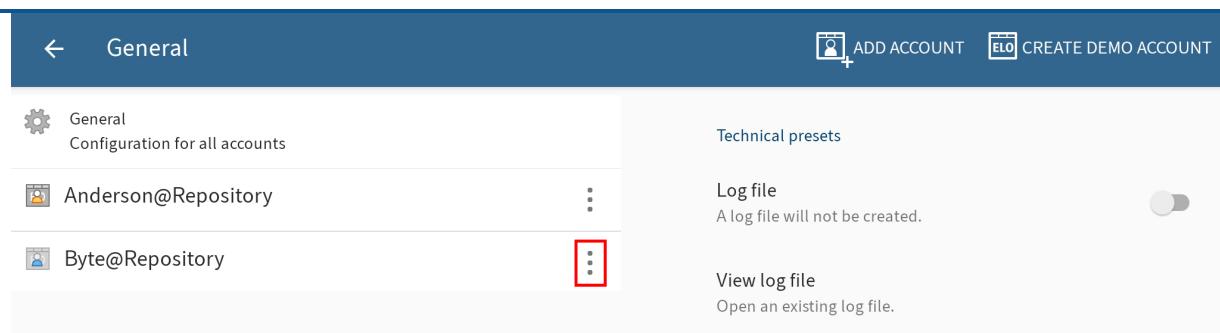
The selected account is assigned the icon for the active account (orange person icon). The account is now active.

Delete account

You can also delete accounts that you no longer need.

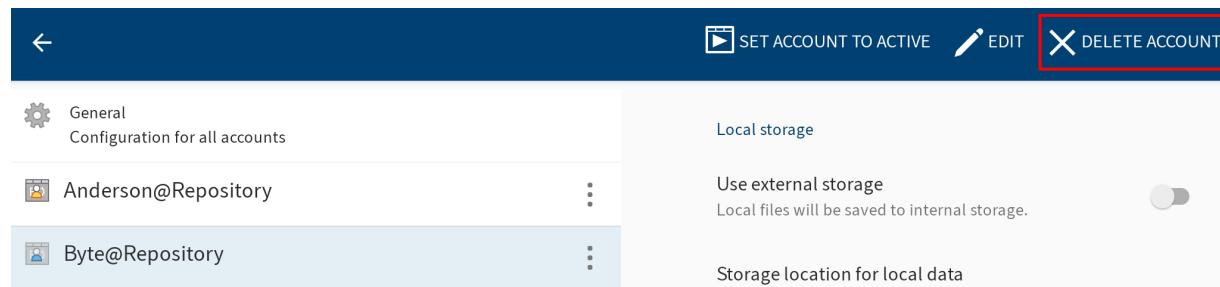
Method

1. Open the configuration via the *Tile navigation > Context menu*.



The *Configuration* dialog box opens.

2. Tap the context menu (button with three dots) for the account you want to delete.



The context menu opens.

3. Tap *DELETE ACCOUNT* in the context menu.

The *Delete account* dialog box appears.

4. To delete the account, tap *YES*.

Result

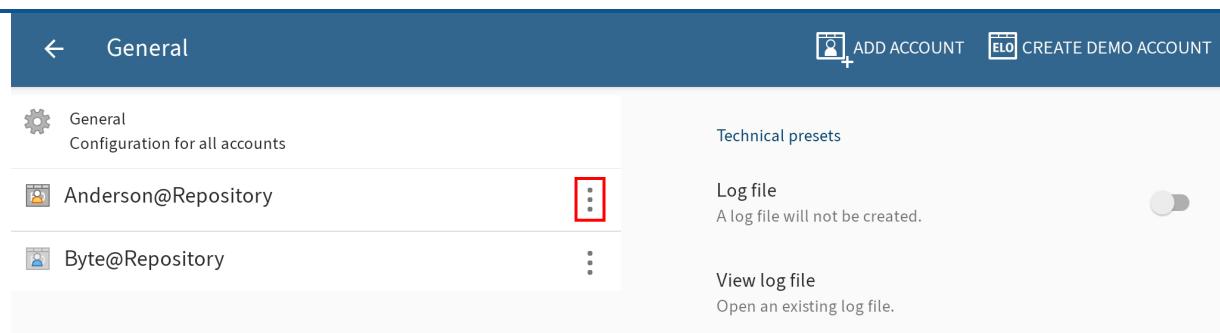
You have deleted the account.

Reconnect account

To reconnect the active account to the repository, use the *RECONNECT ACCOUNT* function. This function establishes a new connection to the repository and reloads all caches and data set forms.

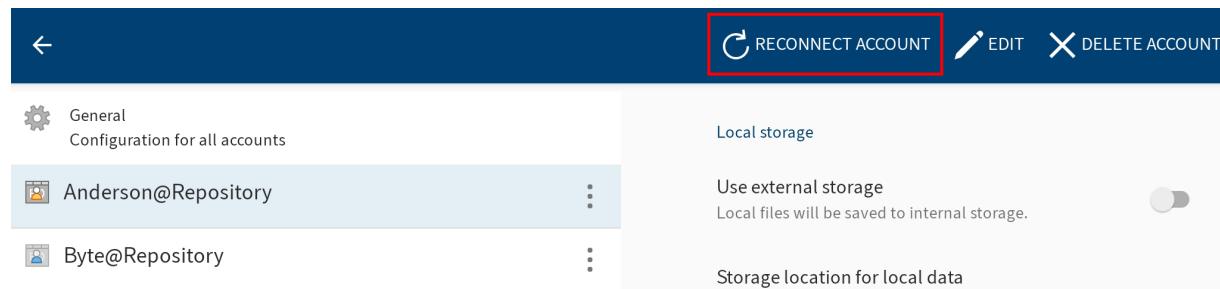
Method

1. Open the configuration via the *Tile navigation > Context menu*.



The *Configuration* dialog box opens.

2. Tap the context menu (button with three dots) for the account you want to reconnect.



The context menu opens.

3. Tap *RECONNECT ACCOUNT* in the context menu.

Result

This reloads the connection.

Basic functions

This chapter explains the basic functions of the ELO app. These include:

- [Create new folder](#)
- [Add file](#)
- [Load new version](#)
- [Open document in read-only mode](#)
- [Edit document](#)
- [Show form](#)
- [Send entry](#)
- [Create margin note](#)
- [Delete entry](#)

For more information on the functions in the [Clipboard](#), [Tasks](#), [Search](#), [Offline](#), [Data sets](#), [Feed](#), and [My ELO](#) areas, refer to the separate chapters.

Create new folder

You can create new child folders in existing folders. You always create a folder in the repository that is connected to the active account.

Information

You can only add new folders in the *Repository* work area.

Method

1. Open the context menu of the folder you want to add a child folder to.
2. In the context menu (button with three dots), tap *New folder*.



The *New folder* dialog box appears.

3. Tap the *Short name* field to enter a name for the new folder.

Optional: The *Folder* metadata form is selected by default. Tap *SELECT METADATA FORM* to change the metadata form.

Information

If a metadata form contains mandatory fields, your administrator will have to create a form and link it to the metadata form so it can be selected in the ELO app.

Information

You cannot create new metadata forms in the ELO app.

4. Tap *OK* to create the new folder.

Result

The *New folder* dialog box closes. You have created a new folder.

Optional: In the configuration, you can specify whether you want a metadata dialog box to appear when filing. You can find more information in the section [Configuration](#).

Add file

You can transfer a file from your device to ELO.

To transfer a file to ELO, you can choose between two options:

- [With the ELO app](#)
- [From an external app](#)

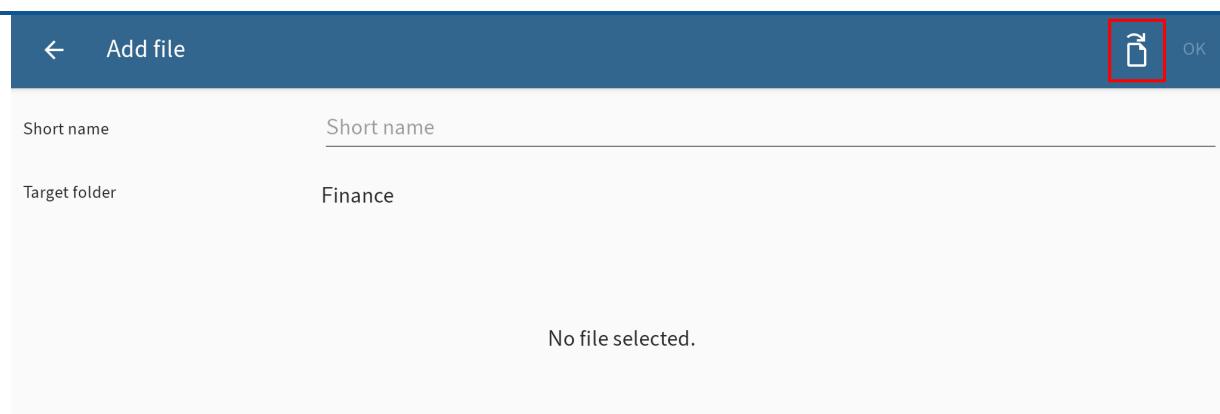
Requirements

You need an external application to add files. The application, such as a file manager or a gallery app, must support file sharing.

Add file with the ELO app

Method

1. Open the context menu for the folder you want to add a file to.
2. In the context menu (button with three dots), tap *Add file*.



The *Add file* dialog box appears.

3. Tap the document icon at the top right.

The *Select file* dialog box appears.

4. Select one of the following options:

- From file system: Opens the *Select file: Detected file systems* dialog box. Navigate through the folder structure on your device to select a file.
- With another app: Opens an external app you can use to upload files.
- Take a photo: Opens the camera app on your device to take a picture, which can be uploaded.



The short name of the file is displayed in the *Add file* dialog box.

Optional: Tap the *Short name* field to change the short name.

5. Tap *SELECT METADATA FORM* to change the metadata form.

The *Select form* dialog box opens.

Information

If a metadata form contains mandatory fields, your administrator will have to create a form and link it to the metadata form so it can be selected in the ELO app.

6. Tap the desired metadata form in the list.

The metadata form is applied. The *Select metadata form* dialog box closes.

Information

You cannot create new metadata forms in the ELO app.

7. Tap *OK* to transfer the file to ELO.

Result

The *Add file* dialog box closes. This takes you to the filing location of the new file in ELO.

Optional: In the configuration, you can specify whether you want a metadata dialog box to appear when filing. You can find more information in the section [Configuration](#).

Add file with external app

You can also transfer files to ELO from external apps.

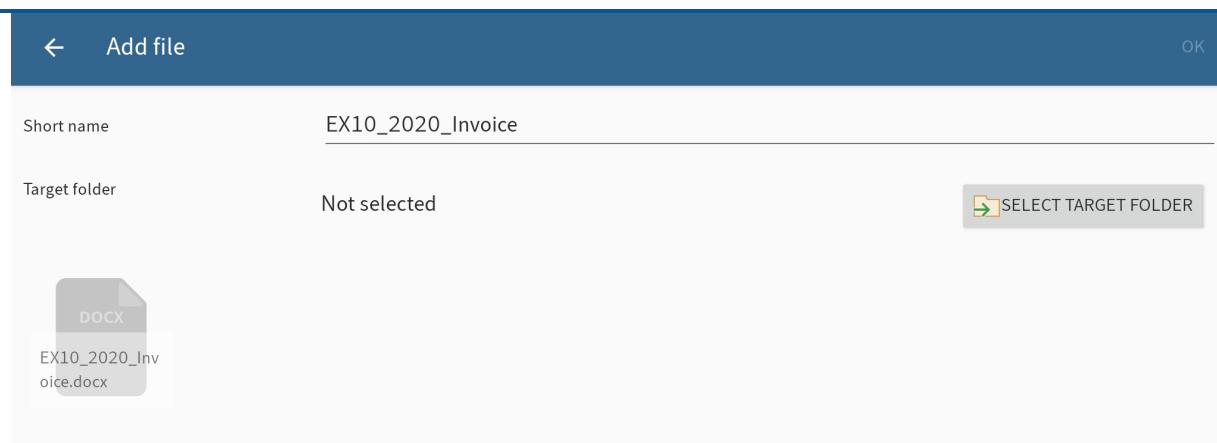
Method

1. To transfer a file from an external app to ELO, use the *Share* function in the respective app.



A dialog box for transferring files appears.

2. Select the option *Add file*.



The *Add file* dialog box appears. The file name is entered into the *Short name* field.

Optional: Tap the *Short name* field to change the short name.

3. To set the filing location for the file, tap *SELECT TARGET FOLDER*.

The *Select target folder*: dialog box appears.

4. Navigate to the folder you want to upload the file to.

The *HISTORY* tab contains the target folders you have previously selected.

5. Confirm your selection with *OK*.

Your selection is applied. The *Select target folder*: dialog box closes.



6. To set a metadata form for the file, tap *SELECT METADATA FORM*.

The *Select form* dialog box opens.

Information

If a metadata form contains mandatory fields, your administrator will have to create a form and link it to the metadata form so it can be selected in the ELO app.

7. Tap the desired metadata form in the list.

The metadata form is applied. The *Select metadata form* dialog box closes.

Information

You cannot create new metadata forms in the ELO app.

8. Tap *OK* to add the file.

Result

The *Add file* dialog box closes. The file has been added. You return to the external application.

Optional: In the configuration, you can specify whether you want a metadata dialog box to appear when filing. You can find more information in the section [Configuration](#).

Load new version

You can load a new version of your documents to document changes to files.

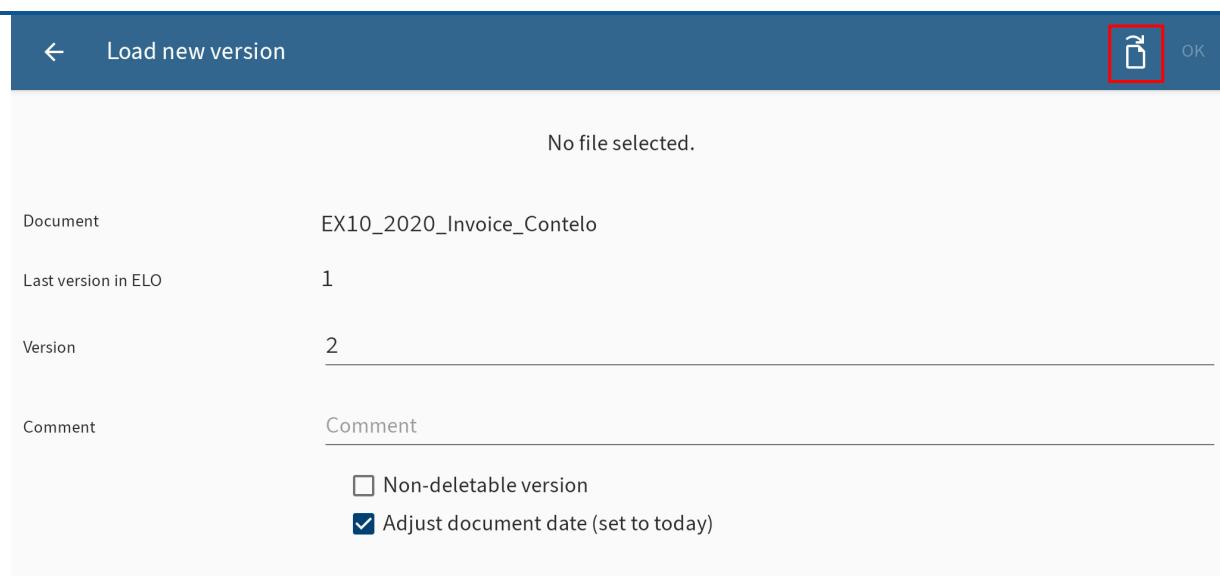
To load a new version, you can choose between two options:

- [With the ELO app](#)
- [With an external app](#)

Load new version with the ELO app

Method

1. Open the context menu for the document you want to load a new version of.
2. In the context menu (button with three dots), tap *Load new version*.



The *Load new version* dialog box appears.

3. Tap the document icon in the top right corner.

The *Select file* dialog box appears.

4. Select one of the following options to load a new version:

- From file system: Opens the *Select file: Detected file systems* dialog box. Navigate through the folder structure on your device to select a file.
- With another app: Opens an external app you can use to upload files.
- Take a photo: Opens the camera app on your device to take a picture, which can be uploaded.

The new file is shown in the *Load new version* dialog box.



5.

You can make the following changes:

- Version: Change the version number in the *Version* field.
- Comment: Enter additional information on the version in the *Comment* field.
- Non-deletable version: Select this option to prevent the version from being deleted from ELO.
- Adjust document date: Enable this option to update the document date.

6. Tap *OK* in the top right corner to load the new version.

Result

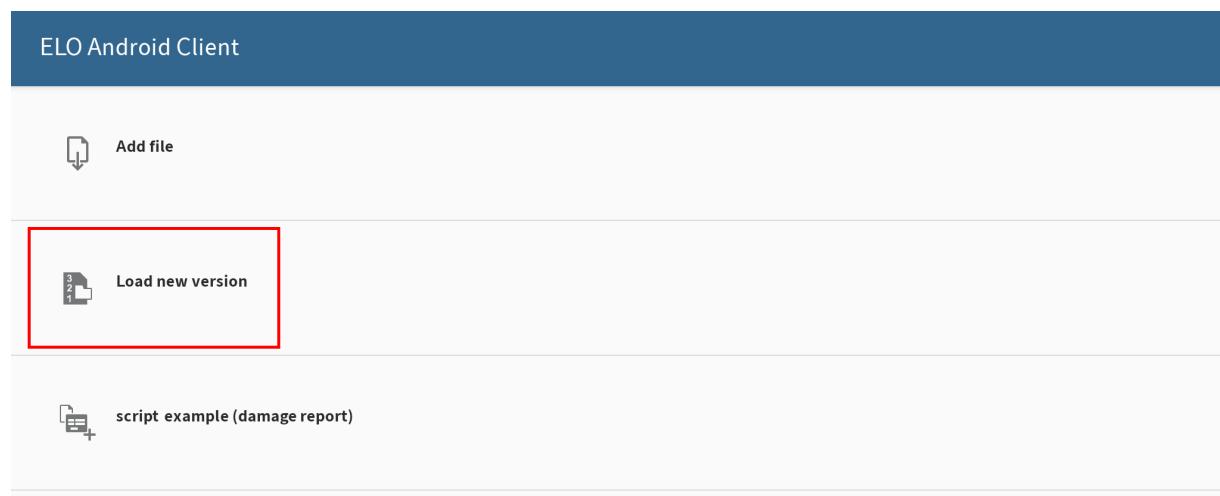
You have filed the new version of the document. The *Load new version* dialog box closes.

Load new version with an external app

You can also transfer files to ELO from external apps.

Method

1. To transfer a file from an external app to ELO, use the *Share* function in the respective app.



A dialog box for transferring files appears.

2. Tap the *Load new version* option.



The *Load new version* dialog box appears.

3. To select the document you want to file a new version of in ELO, tap *SELECT TARGET DOCUMENT*.

The *Select document:* dialog box appears.

4. In the folder structure, navigate to the document you want to load a new version of.

The *HISTORY* tab contains the target folders and documents you have previously selected.

5. Confirm your selection with *OK*.

The *Select document:* dialog box closes. The selected file appears in the *Load new version* dialog box.

6. You can make the following changes:

- Version: Change the version number in the *Version* field.
- Comment: Enter additional information on the version in the *Comment* field.
- Non-deletable version: Select this option to prevent the version from being deleted from ELO.
- Adjust document date: Enable this option to update the document date.

7. Tap *OK* in the top right corner to load the new version.

Result

You have filed the new version of the document. The *Load new version* dialog box closes.

Open document in read-only mode

You can open filed documents in read-only mode.

Information

This function is not available in the *Data sets* work area.

Requirements

You must have an external application installed on your device that can open the selected file type.

Method

1. Open the context menu of the document that you want to open in read-only mode.
2. Tap *OPEN IN READ-ONLY MODE* in the context menu.

Result

The document opens in an external application. If multiple suitable applications are installed on your device, a dialog box appears. Select an application.

Use the Android *Back* button to return to the ELO app.

Edit document

With the *Edit document* function, you can make changes to a document using a third-party application (e.g. text processing app).

Information

Not all third-party applications support this function.

Method

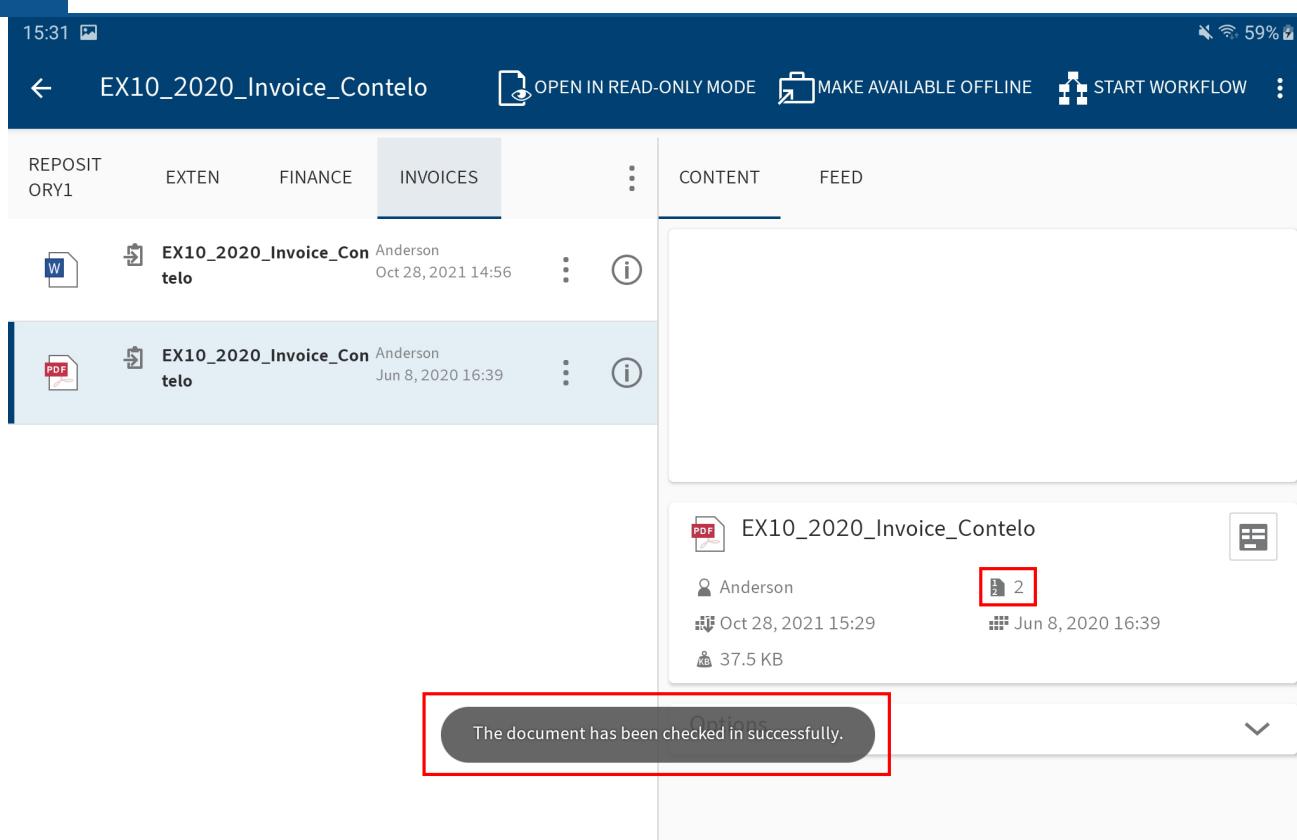
1. Open the context menu of the document that you want to edit.
2. In the context menu (button with three dots), tap *Edit document*.

The document opens in an external app. If several apps are available, choose the app you want to use to edit the document.

Once the document is open in an external app, it is checked out of ELO and locked for other users.

3. Make the desired changes to the document.
4. To finish editing, save your changes in the external app.
5. Close the external app to return to the ELO app.

Result



The document is automatically checked back into ELO once you have saved your changes in the external app and closed it. The document is unlocked for other users. A new version of the document is filed.

Show form

To view or edit the metadata for an entry, use the *Show form* function.

Requirements

Your administrator must have linked a form to the metadata form and defined it as a preview form. For more information, refer to the *ELO Java Client Workflow* manual.

Information

If a preview form has not been assigned to the metadata form, the ELO app loads a default form with the fields *Short name*, *Document date*, and *Extra text*.

Method

1. Select an entry and open the detailed view.

The screenshot shows the ELO mobile app interface. At the top, there is a header with the title "Offer-Zastry_2020_0001". Below the header are several tabs: "REPOSIT", "EXTEN", "FINANCE", "ORDERS", "2020", "CONTENT", and "FEED". The "CONTENT" tab is currently selected. On the left side, there is a list of documents with icons and details. One document, "Offer-Zastry_2020_0001" by Farrell, dated Jun 5, 2020 14:06, has its form icon (a document with a grid) highlighted with a red box. On the right side, there is a preview of the document's content, which includes a large PDF file and some smaller text snippets.

2. Tap the form icon on the *CONTENT* tab.

Alternative: You can also access the *Show form* function from the context menu (button with three dots).

The screenshot shows the "Show form" dialog box. It has a header with a back arrow and a refresh icon. The main area contains input fields for "Short name" (Offer-Zastry_2020_0001), "Document date" (Jun 5, 2020, 2:06 pm), and "Extra text". Below the input fields is a section labeled "Save without passing forward" with "Save" and "Print" buttons. A red box highlights the "Form" icon (a document with a grid) located at the bottom right of the dialog box.

The *Show form* dialog box appears. The dialog box displays the corresponding form.

Optional: Tap the input fields to edit the metadata. To save your changes, tap *Save*.

3. To close the *Show form* dialog box, tap *Back* (arrow icon at top left).

Result

The dialog box closes.

Send entry

You can send entries by e-mail.

Method

1. Open the context menu for the entry you want to send.
2. In the context menu (button with three dots), tap *Send*.

The *Send* dialog box appears.

3. Choose from the following options:

- Send as ELO link: This function enables you to send another user a direct link to an entry in the repository.
- Send document: This function allows you to send a document as an e-mail attachment to someone without access to the repository.

Optional: A dialog box appears if multiple suitable applications are installed on your device.
Select an application.

The external application starts.

4. Send the entry as an attachment in the way you normally do in this application.

Result

You have sent an ELO link or a document as an e-mail attachment. The external application closes.

Create margin note

You can place margin notes on a document or folder. You can create three types of margin notes:

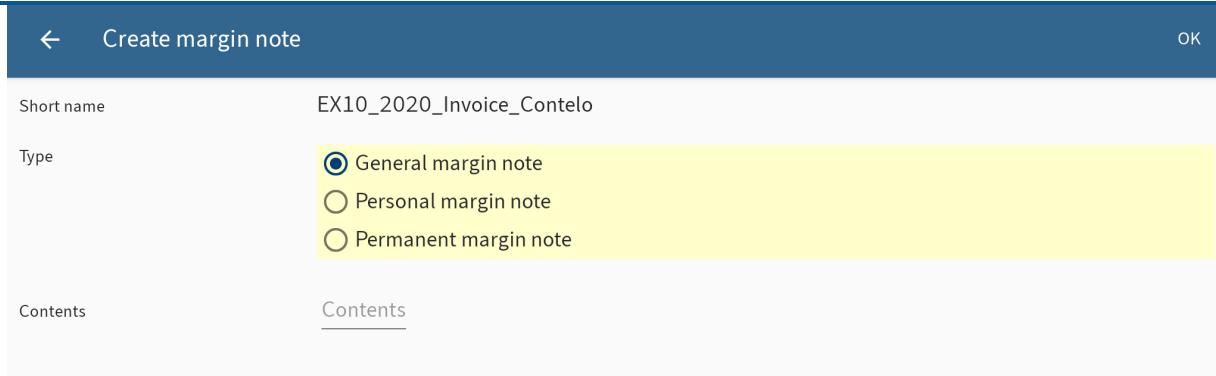
- General margin note (yellow): Visible to every user.
- Personal margin note (green): Only visible to the creator of the margin note.
- Permanent margin note (red): This margin note can be viewed by every user and cannot be deleted.

Information

This function is only available in the *Repository* work area.

Method

1. Select an entry and open the context menu.
2. In the context menu (button with three dots), tap *Create margin note*.



The *Create margin note* dialog box appears. *General margin note* is set as the type by default.

Optional: Tap *Personal margin note* or *Permanent margin note* to change the type.

3. Enter your text for the margin note to the *Contents* field.

4. Tap *OK* to save the margin note.

Result

The screenshot shows the ELO mobile app interface. At the top, it says 'Anderson@Repository'. There are tabs for 'REPOSITORY', 'EXTEN', 'FINANCE', and 'INVOICES' (which is currently selected). Below the tabs, there are two invoice entries:

- EX10_2020_Invoice_Con** Anderson Oct 28, 2021 14:56
- EX10_2020_Invoice_Con** Anderson Jun 8, 2020 16:39

On the right side, there's a 'CONTENT' section with a list of files and a 'Margin notes (1)' detail area. The 'Margin notes (1)' area is highlighted with a red box and contains the following text:

- Anderson Oct 28, 2021 15:35
- Contact: Mrs Smith

The *Create margin note* dialog box closes. The margin note you created is in the *Margin notes* detail area of the viewer pane.

Optional: To edit or delete a general or personal margin note, tap the pen icon in the *Margin notes* detail area. The *Edit margin notes* dialog box appears. In this dialog box, you can change the contents and type of margin note, or delete the margin note.

Delete entry

You can also delete folders and documents that you no longer need.

Important

The entries are not deleted permanently, just marked as deleted. This mark signals the administrator to remove the documents from ELO permanently.

Method

1. Open the context menu of the entry that you want to delete.
2. In the context menu (button with three dots), tap *Delete*.
The *Delete entry* dialog box appears.
3. Tap *YES* to confirm.

Result

You have deleted the entry.

Clipboard

You can copy frequently used folders and documents to the *Clipboard* work area. This enables you to put together a favorites list for quick access to your most important data. A reference to the selected entry is created on the Clipboard. The filing location in ELO does not change.

The screenshot shows the ELO mobile app interface. At the top, there's a header with a back arrow, the word "Finance", and various navigation icons: "GO TO", "MAKE AVAILABLE OFFLINE", "START WORKFLOW", and a more options menu. Below the header, the left side is labeled "CLIPBOARD" and lists five entries:

- Finance**: Checked (indicated by a red border), created by Administrator on Sep 13, 2021. It has three dots and an info icon.
- Articles**: Checked, created by Administrator. It has three dots and an info icon.
- Headquarter**: Unchecked (gray border), created by [Byte] on Sep 14, 2021 at 07:58. It has three dots and an info icon.
- Order template**: Unchecked, created by Farrell on May 15, 2019 at 12:20. It has three dots and an info icon.
- EX10_2020_Invoice_Con**: Unchecked, created by Anderson on Jun 8, 2020 at 16:39. It has three dots and an info icon.

The right side of the screen is divided into "CONTENT" and "FEED". The "CONTENT" section shows a summary of the clipboard items. The "FEED" section shows a list of recent activity:

- Finance: Created by Administrator on Sep 13, 2021 at 09:53.
- Form: Folder
- Options

Copy to clipboard

You can place frequently used folders and documents on the Clipboard. This enables you to access your entries faster. Use the clipboard icon to do so.

You will find the clipboard icon in front of the short name of the entry in the list view.

This screenshot shows the ELO mobile app interface with a different view. The top bar includes a menu icon, the user name "Anderson@Repository", a search icon, a refresh icon, and a "CREATE DATA SET" button.

The left side shows a list of items with a "REPOSIT" and "EXTEN" tab header. The "EXTEN" tab is active. The first item, "Finance", has a red box around its clipboard icon, indicating it is currently on the clipboard. Other items include "HR" and another "Finance" entry.

The right side shows a "CONTENT" and "FEED" section, which is identical to the one in the previous screenshot, displaying the clipboard contents and recent activity.

The gray clipboard icon means the entry has not been placed on the Clipboard.

Alternative: You can also access the *Copy to Clipboard* function from the context menu (button with three dots).

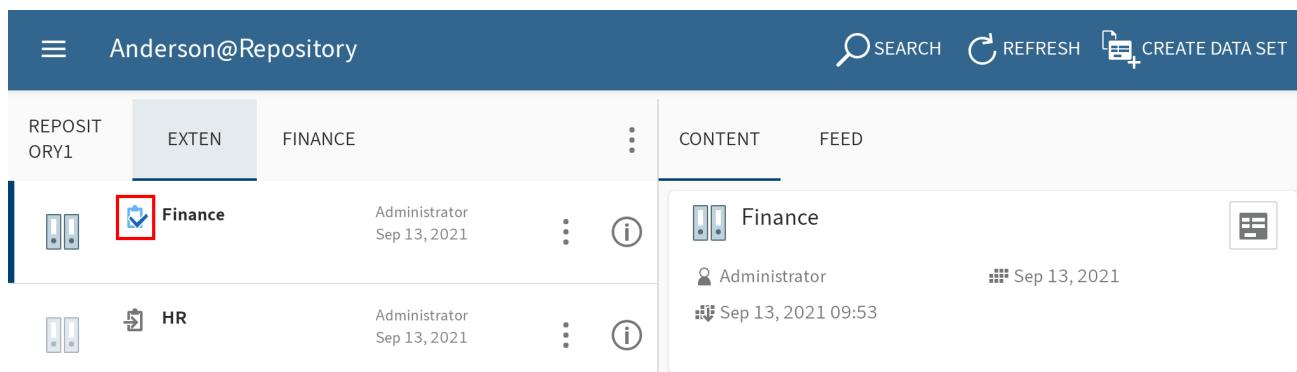
Information

This function is only available in the *Repository* and *Search* work areas.

Method

To copy an entry to the Clipboard, tap the clipboard icon.

Result



The screenshot shows the ELO mobile app interface. At the top, there is a header bar with the title "Anderson@Repository". On the right side of the header are three icons: a magnifying glass for "SEARCH", a circular arrow for "REFRESH", and a clipboard with a plus sign for "CREATE DATA SET". Below the header, there are two main sections: "CONTENT" and "FEED". The "CONTENT" section contains a list of items. One item, "Finance", is highlighted with a blue clipboard icon. To the right of the list, there is a sidebar with a "Clipboard" section containing the same "Finance" entry, showing its details: "Administrator" and the date "Sep 13, 2021".

The clipboard icon is blue. This means the entry has been placed on the Clipboard.

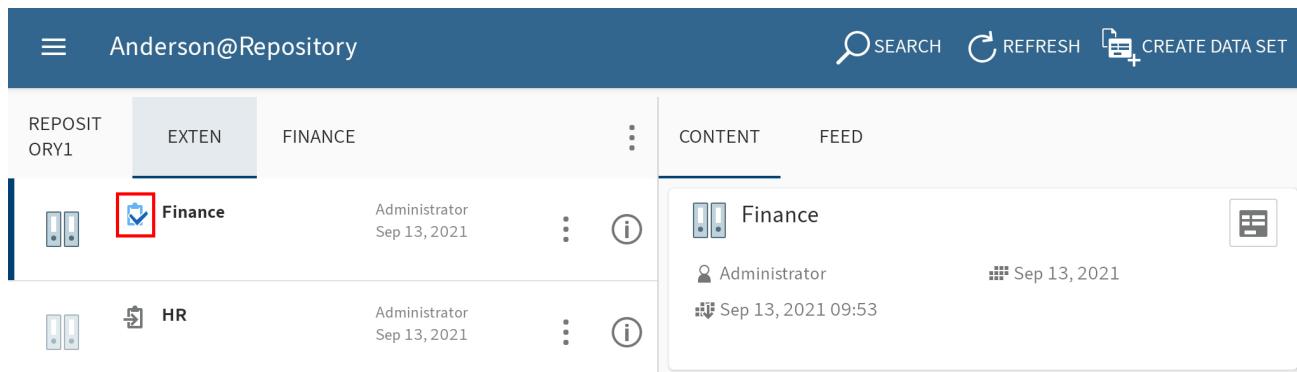
Remove from Clipboard

You can remove entries that you no longer use frequently from the Clipboard.

Please note

If you remove an entry from the Clipboard, this only deletes the reference to the entry from the *Clipboard* work area. The entry remains in the *Repository* work area. To delete an entry from the *Repository* work area, use the *Delete* function.

Use the clipboard icon to remove entries from the Clipboard. You will find the clipboard icon in front of the short name of the entry in the list view.



The screenshot shows the ELO mobile app interface, similar to the previous one but with a key difference. The "Finance" entry, which previously had a blue clipboard icon, now has a white clipboard icon. This indicates that the entry has been removed from the Clipboard. The rest of the interface, including the header, other entries, and the sidebar, remains the same.

The blue clipboard icon means the entry has been placed on the Clipboard.

Alternative: You can also access the *Remove from Clipboard* function from the context menu (button with three dots).

Method

To remove an entry from the Clipboard, tap the blue clipboard icon.

Result

You have removed the entry from the Clipboard. The clipboard icon is gray.

Tasks

The *Tasks* work area contains an overview of your workflows and reminders. This is where you process your tasks.

The screenshot shows the 'Tasks' section of the ELO mobile app. At the top, there is a header bar with a menu icon (three horizontal lines) and the text 'Cole@Repository'. Below this is a 'TASKS' section. Two task cards are listed:

- First check** (bold, green dot):
 - Claims
 - Due on NovIcons: exclamation mark, A, W, three dots, info icon.
- Collect ideas** (bold):
 - Order
 - GRP_POST Task date: SepIcons: A, W, three dots, info icon.

View

New tasks are shown in a bold font and marked with a green dot. Tasks with passed deadlines are displayed with an exclamation mark.

Configuration

In the *Configuration* dialog box, you can specify which types of tasks to display and which criteria to sort the task list by. You can find more information in the section Configuration.

Start workflow

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

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 [Start ad hoc workflow](#).

'Start workflow' function

You can start new workflows. Use workflow templates for this.

Information

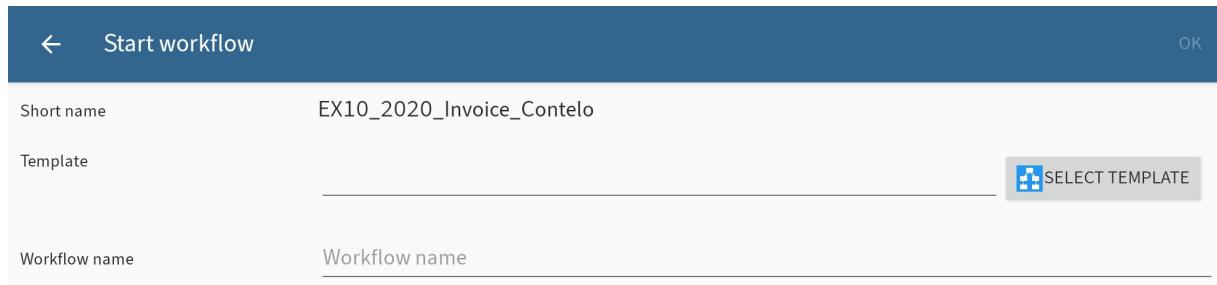
This function is only available in the *Repository* and *Clipboard* work areas.a

Requirements

The workflow templates have already been created in ELO. You cannot create workflows templates in the ELO app.

Method

1. Select the desired entry and open the context menu.
2. Tap *START WORKFLOW* in the context menu.



The *Start workflow* dialog box appears.

3. Tap *SELECT TEMPLATE*.

The *Select template* dialog box appears.

4. Tap the corresponding entry in the list to select a template.

The workflow name is entered to the *Template* and *Workflow name* fields.

Optional: Change the workflow name. Tap the *Workflow name* field and enter a new name.

5. Tap *OK* to start the workflow.

Result

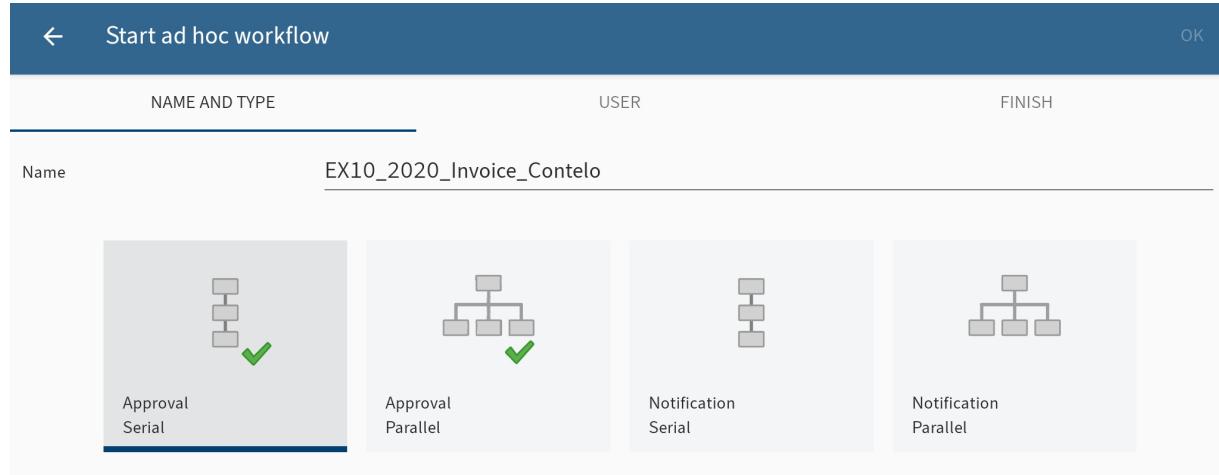
The *Start workflow* dialog box closes. The workflow starts.

Start ad hoc workflow

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.

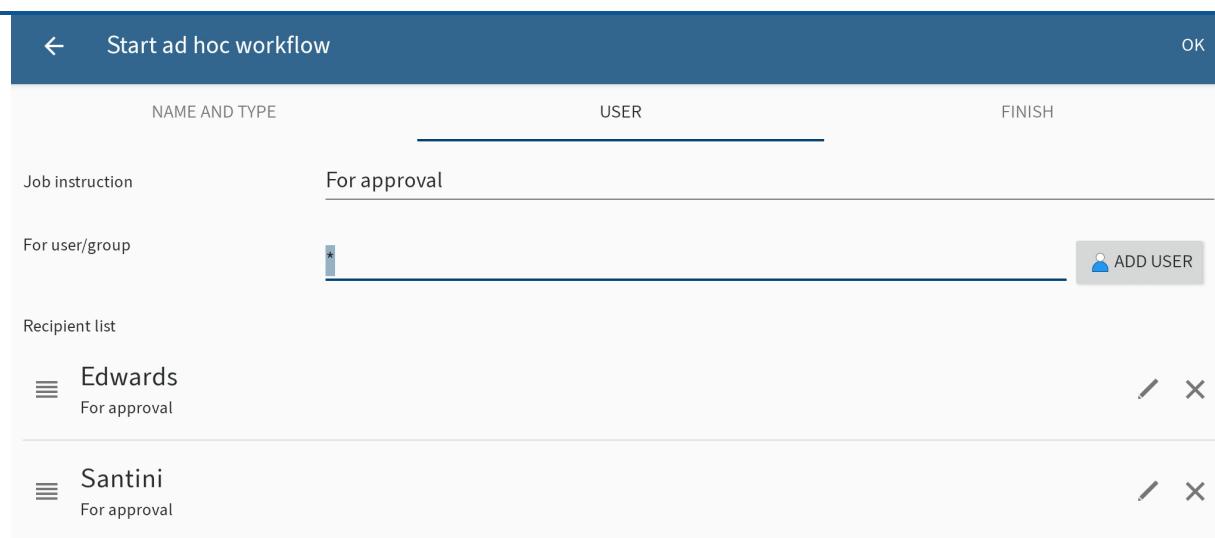
Method

1. Select the desired entry and open the context menu.
2. In the context menu (button with three dots), tap *Start ad hoc workflow*.



The *Start ad hoc workflow* dialog box opens.

3. In the *Name* field, enter a name for the workflow.
4. 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 they 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 in turn. As long as the user does not confirm the workflow, the workflow is not forwarded to the next participants.
 - Parallel notification: The workflow is sent to all participants at once. Participants have to confirm that they have received the workflow. Once completed, the corresponding notification is sent to the selected recipient.
5. Switch to the *USER* tab.



6. In the *Job instruction* field, enter the individual job instruction for the user. The user sees the job instruction in the workflow step column of the *Tasks* work area as soon as they have accepted the workflow.

The *For user/group* field is completed with an asterisk symbol by default. This means the job instruction is assigned to all users. To change the job instruction for individual users, tap the pencil icon next to the respective entry.

7. Add the workflow recipients using the *ADD USER* button.

You will see the selected users in the *Recipient list*.

For serial workflows, you can change the order in which the workflows are sent to the users. Tap the user in the list and move them to a new position in the list, keeping your finger pressed down.

8. Change to the *FINISH* tab.

In the Recipient field, you can see which user will be notified when the ad hoc workflow is completed. To change the recipient, tap *SELECT USER*.

Enter a text for the completion message in the *Success message* field.

Enter a text for the cancellation message in the *Cancellation message* field. This only applies to Approval type ad hoc workflows.

In the *End script* field, you can select a script that is executed after the ad hoc workflow is completed.

Requirement: Your administrator has provided an end script. You will find more information in the [ELO Java Client Workflow](#) documentation.

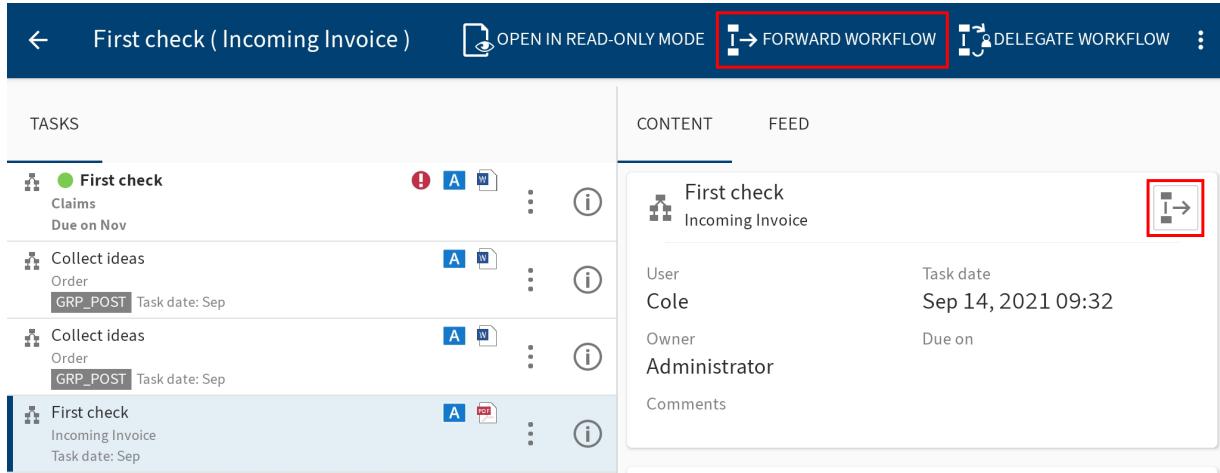
9. Tap *OK* to start the ad hoc workflow.

Forward workflow

To transfer a workflow to the next user, select the *Forward workflow* function.

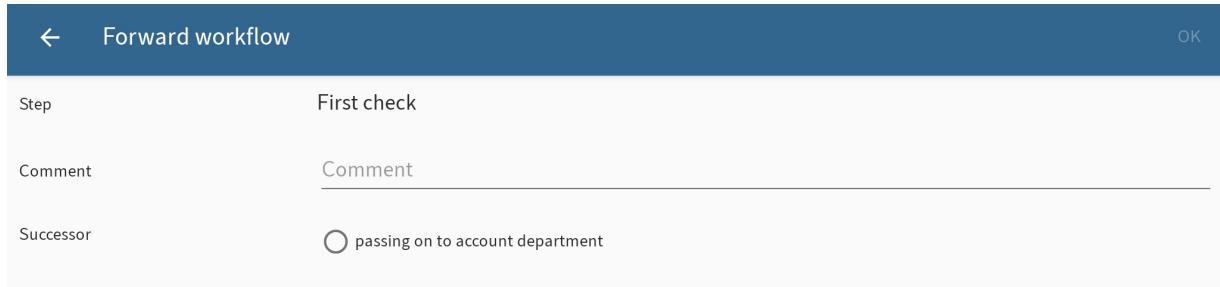
Method

1. In the *Tasks* work area, select the workflow you want to forward and open the context menu.



2. In the context menu (button with three dots), tap *Forward workflow*.

Alternative: In the viewer pane, tap *Forward workflow* to the right of the short name.



The *Forward workflow* dialog box appears.

3. Tap the user that you want to forward the workflow to.

The successor is highlighted.

Optional: Tap the *Comment* input field to add a note to the workflow.

4. Tap *OK*.

Result

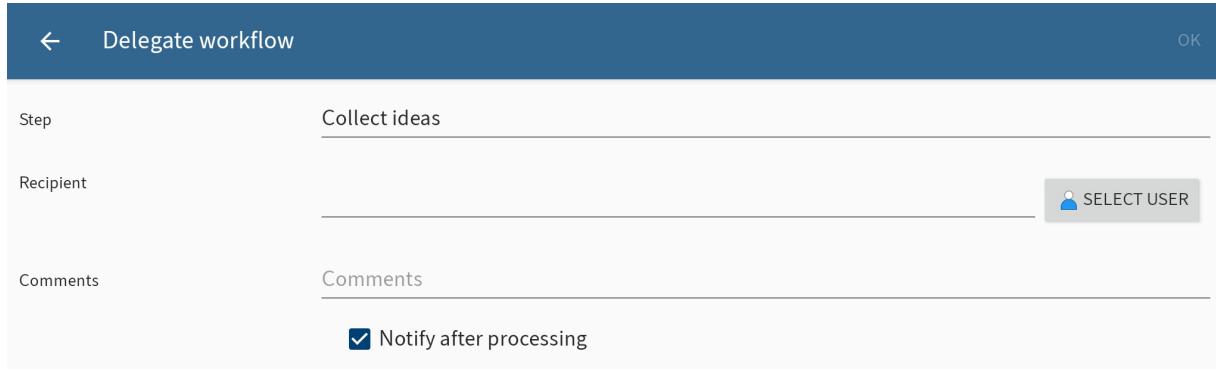
You have forwarded the workflow to the selected user. The *Forward workflow* dialog box closes.

Delegate workflow

To assign a workflow to another user, use the *Delegate workflow* function.

Method

1. Select the desired entry in the *Tasks* work area and open the context menu.
2. Tap *Delegate workflow* in the context menu.



The *Delegate workflow* dialog box appears.

3. Tap *SELECT USER*.

The *Select user or group* dialog box appears.

4. Tap an entry in the list to select a recipient.

You can make the following changes:

- Notify after processing: This option is enabled by default. This means that you get the workflow back after it has been processed to check its status. Tap to uncheck the box if you do not want to be notified.
- Information: To add a note to the workflow, tap the input field.

5. Tap *OK*.

Result

You have delegated the workflow to the selected recipient. The *Delegate workflow* dialog box closes.

Accept workflow

Workflows sent to a group appear in the *Tasks* work area of all group members. To process this type of workflow, use the *Accept workflow* function. Now, only you can process the workflow, and the other group members no longer see the workflow in their tasks. This prevents multiple users from being able to process the same workflow at the same time.

Method

1. In the *Tasks* work area, select the workflow and open the context menu.

The screenshot shows the ELO mobile app interface. At the top, there's a blue header bar with the title "Collect ideas (Order)". Below the header are three buttons: "OPEN IN READ-ONLY MODE", "ACCEPT WORKFLOW" (which is highlighted with a red box), and "MARK AS UNREAD". The main area is divided into three sections: "TASKS", "CONTENT", and "FEED". In the "TASKS" section, there are several workflow items listed. One item, "Collect ideas Order", has its context menu (three dots) open. In the "CONTENT" section, there's a card for "Collect ideas Order" with details like "User: GRP_POST", "Task date: Sep 14, 2021 09:28", and a checked checkbox.

2. In the context menu (button with three dots), tap *Accept workflow*.

Alternative: In the viewer pane, tap *Accept workflow* to the right of the short name.

Result

The workflow is assigned to you. Other users of the group do not have access to it.

Edit workflow form

You can fill out workflow forms, save the data entered to them, and forward them.

If a workflow is based on a form, the *Workflow form* button is shown both in the viewer pane and the context menu of the respective workflow.

Requirements

The workflow forms must have been created in a desktop version of ELO. You cannot create workflows forms in the ELO app.

Method

1. In the *Tasks* work area, select the workflow and open the context menu.

The screenshot shows the ELO mobile app interface. At the top, there's a blue header bar with the title "Damage report (Damage report)". Below the header are three buttons: "WORKFLOW FORM" (which is highlighted with a red box), "OPEN IN READ-ONLY MODE", and "DELEGATE WORKFLOW". The main area is divided into three sections: "TASKS", "CONTENT", and "FEED". In the "TASKS" section, there are several workflow items listed. One item, "Collect ideas Order", has its context menu (three dots) open. In the "CONTENT" section, there's a card for "Damage report Damage report" with details like "User: Cole", "Owner: Anderson", and a checked checkbox.

2. Tap the *Workflow form* button to open the form.

Alternative: Tap the *Workflow form* button in the viewer pane of the selected workflow.

The screenshot shows the 'Workflow form' dialog box. At the top, there's a back arrow and a refresh/circular arrow icon. The title 'Workflow form' is followed by a subtitle 'Damage report'. The form is divided into several sections: 'Customer data' (with fields for Insurance number, Damaged number, Insured person, Last name, First name, Street, Nr., Zip code, City), 'Damage' (with checkboxes for Fire, Hail, Landslide, Flood, Other), and 'Date of the accident' (with a date input field and a calendar icon). Below these sections are buttons for 'Next processing step' (labeled 'node 3') and 'Save without passing forward' (with 'Save' and 'Print' buttons).

The *Workflow form* dialog box appears. The form is displayed.

3. Complete the form. You can edit different fields depending on the form.

Optional: Tap *Save* to save your entries. Tap *Print* to print the form.

4. Depending on the workflow structure, forms are usually forwarded to the next user/node after being processed. To forward a workflow form, tap the corresponding button under *Next processing step*.

Result

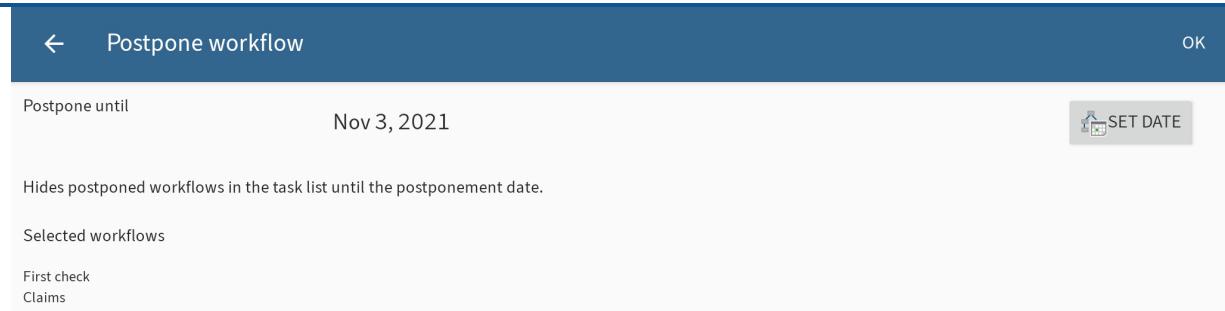
The form is forwarded to the next user of the workflow with the information you entered. The *Workflow form* dialog box closes.

Postpone workflow

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.

Method

1. Select the desired entry in the *Tasks* work area and open the context menu.
2. In the context menu (button with three dots), tap *Postpone workflow*.



The *Postpone workflow* dialog box appears.

3. To specify how long you want to postpone the workflow for, tap *SET DATE*.
4. Select a date in the calendar.
5. Tap *OK*.

Result

You have postponed the workflow. The workflow is hidden from your task list until the selected date.

Delete workflow

You can delete workflows that you no longer need.

Method

1. Select the desired entry in the *Tasks* work area and open the context menu.
2. In the context menu (button with three dots), tap *Delete*.

The *Delete workflow permanently* dialog box opens.

3. Tap *YES* to confirm.

Result

You have deleted the workflow. The *Delete workflow permanently* dialog box closes.

Search

You can use the *Search* function on the menu bar to search ELO. The search results are displayed in the *Search* work area. From here, you can start a new search, create search favorites, and edit previous searches.

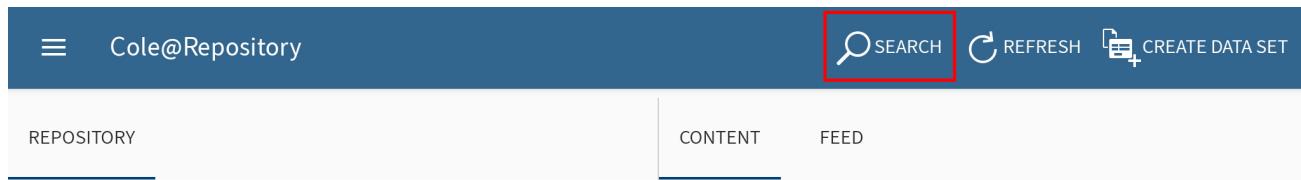
In the *Configuration* dialog box, you can specify which fields to include during the search. You can find more information in the section Configuration.

Start new search

You can start a search in any work area using the *SEARCH* button on the action bar. Tap the *SEARCH* button on the action bar.

Alternative: You can tap the magnifying glass icon in the *Search* work area to start a new search.

Method



1. Tap *SEARCH* on the action bar.

A search field and a list of search suggestions open on the menu bar. The on-screen keyboard opens.

2. Enter a search term.
3. Tap a suggestion from the list.

Alternative: Tap the *Enter* button on the on-screen keyboard to look for a specific character or a character string.

Result

The search starts. You are directed to the results list in the *Search* work area.

The screenshot shows a search results list for the term 'COLE'. The results include two items: 'Order Cole' (Administered by Administrator on May 29, 2020 at 10:46) and 'Invoice expected' (Administered by Anderson on Jan 5, 2016 at 15:08). To the right of the results is a 'SEARCH SETTINGS' panel. At the top of this panel is a red-bordered filter icon. Below it are fields for 'Search input' (set to 'cole') and 'Fields searched'. There are buttons for 'ADD SEARCH FILTER' and 'REFRESH SEARCH'.

Optional: To change your search settings and add search filters, tap the filter icon to the top right of the results list. You can find more information in the section [Edit search and add filters](#).

Edit search and add filters

You can edit a search that you have already used by changing the search term and adding or deleting filters.

Method

1. To change the settings for a search you have already performed, tap the info icon next to the corresponding search in the list view of the *Search* work area.

Alternative: In the list view, tap the corresponding search to open the results list.

The search settings appear in the viewer pane.

The screenshot shows a search results list for the term 'cole'. The results include three items: 'Contelo' (marked with a yellow star), 'invoice' (marked with a yellow star), and 'cole' (which is highlighted with a blue border). To the right of the results is a 'SEARCH SETTINGS' panel. It shows the 'Search input' field set to 'cole'. Under 'Fields searched', there are four toggle switches: 'Short name' (on), 'Full text' (on), 'Fields' (on), and 'Extra text' (off). There are buttons for 'ADD SEARCH FILTER' and 'REFRESH SEARCH'.

2. You can make the following settings:

- Search input: To change the search term, tap the input field.
- Fields searched: Select which fields to include in the search. You can choose the fields *Short name*, *Full text*, *Fields*, and *Extra text*.

At least one field has to be selected.

Information

The *REFRESH SEARCH* button is active once you have made a change. Tap the button to start the search again.

Add search filter

3. To apply search filters, tap *ADD SEARCH FILTER*.

The *Select filter* dialog box appears. You can select the following filters:

- Date: Only entries with the selected document date are shown.
- Form: Only entries filed with the selected form are shown.
- Entry type: Only the selected entry type is shown.
- Filed by: Only entries filed by the selected user are shown.
- Editor: Only entries for which the selected user is entered as the editor are shown.
- Filing date: Only entries filed on the selected date are shown.

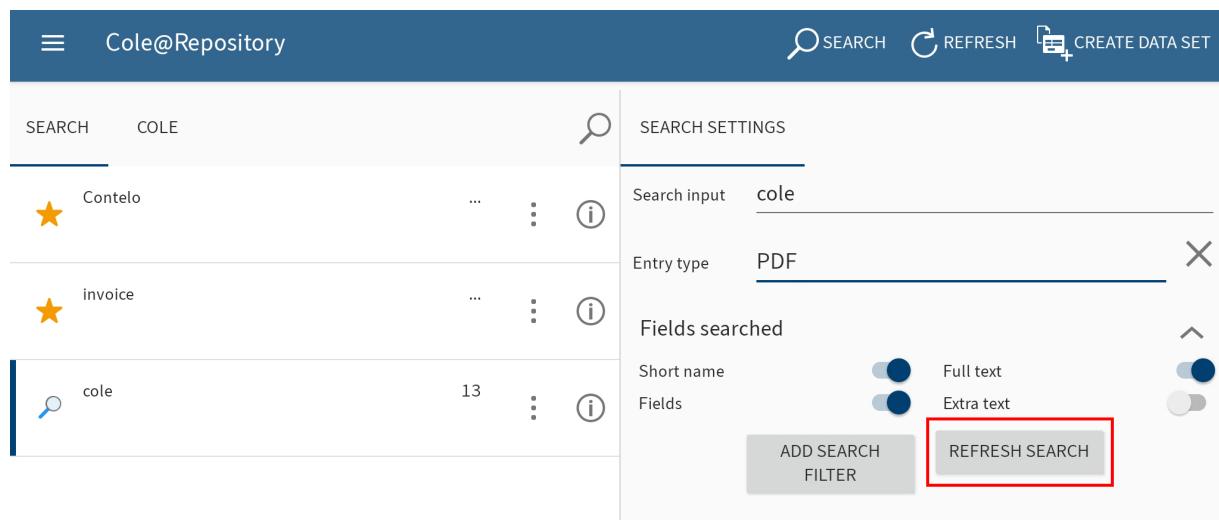
4. In the *Select filter* dialog box, tap the desired filter.

The filter appears in the viewer pane with an input field. By default, the input field contains a placeholder symbol.

5. Tap the input field and delete the placeholder symbol.

A drop-down menu appears.

6. In the drop-down menu, tap the desired filter setting.



The selection appears in the filter input field.

Information

To remove a filter, tap the X icon next to the filter.

- 7.

To start the search with the new settings, tap *REFRESH SEARCH*.

Result

The search is refreshed. The list of results appears.

Create favorite

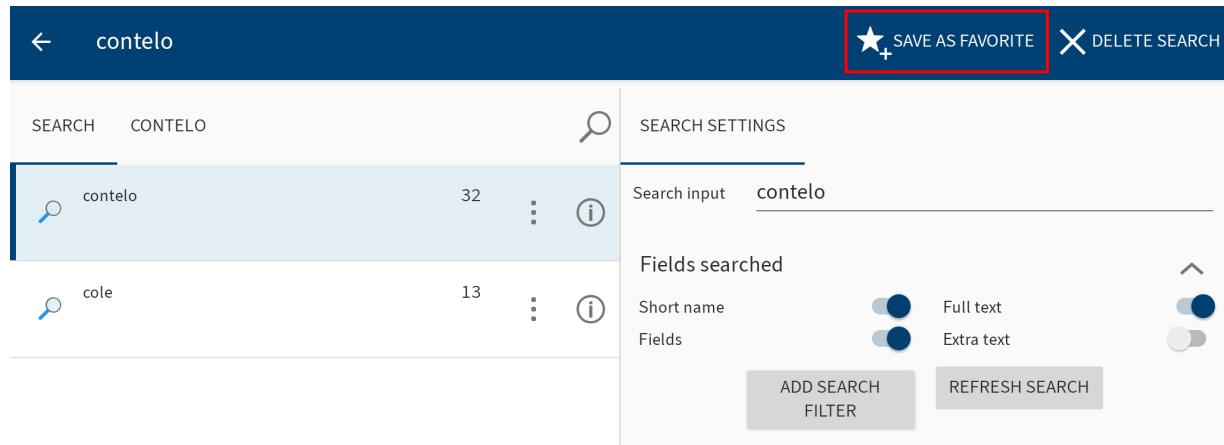
All searches are saved in the *Search* work area. These are deleted when you close the ELO app. To save a search permanently, you need to save it as a favorite. Favorites are not deleted when you close the app.

Information

Search favorites that you create in the ELO app are also available in other clients. However, search favorites created in other clients are not available in the ELO app.

Method

1. Open the context menu of the respective search.



2. In the context menu, tap *SAVE AS FAVORITE*.

The *Enter a name for the search favorite* dialog box appears.

3. Name the search favorite.
4. Tap *OK* to confirm.

Result

The favorite is now saved to the *Search* work area. The star icon represents favorites.

Optional: To delete a favorite, use the *DELETE FAVORITE* function in the context menu.

Offline

You can file folders and documents you would like to access even without an Internet connection in the *Offline* work area. The entries are filed as a copy to the internal or external storage of your device. The filing location in ELO does not change.

In the *Configuration* dialog box, you can specify whether to store entries from the *Offline* work area to the internal storage of your device or to an external storage medium such as an SD card.

Make entries available offline

You can transfer any document or folder from the *Repository* work area to the *Offline* work area access to your data even without an Internet connection. The documents and folders are filed as a copy to the internal storage of your device or to an external storage device (such as an SD card).

Information

Other applications also have access to entries filed offline.

Please note

Depending on the size of the entry you are transferring, large data volumes may need to be processed. We only recommend transferring large data volumes to the Offline work area when your device is connected to the Internet and a power source. Please make sure that you have sufficient storage space.

Information

Margin notes are not stored offline for technical reasons.

Method

1. Select the desired entry and open the context menu.
2. Tap *MAKE AVAILABLE OFFLINE* in the context menu.

This starts a background process that makes the selected entry available offline. This may take several minutes depending on the data volume.

Result

Once the background process is complete, you will find the entry in the *Offline* work area. You can now access the entry without an Internet connection.

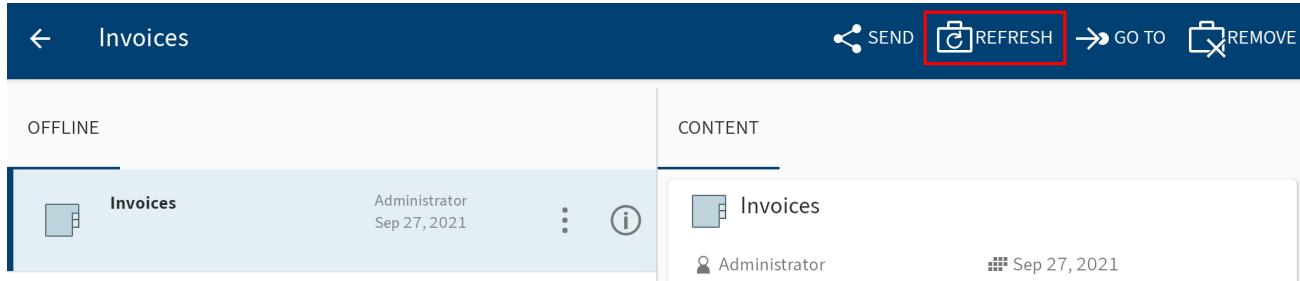
Information

Tap *Background processes* in the tile navigation context menu to see the status of the background process. The *Active processes* area appears.

Refresh entry in the Offline area

In the *Offline* work area, you see the status of the entries the last time they were synchronized. Changes to the original entries are not automatically transferred to the *Offline* work area. To ensure that your offline entries are up to date, you need to refresh the entries.

Method



To refresh the data of an entry, tap *REFRESH* in the entry's context menu.

Result

A background process starts. The data of the selected entry is compared with the data on the server and refreshed.

Remove entries from the Offline area

If you want to delete offline entries from your device, you need to remove them from the *Offline* work area.

Information

Entries filed to the *Offline* work area are deleted from your device/external storage medium. The original entries remain in ELO.

Method

1. Select the desired entry and open the context menu.
2. Tap *REMOVE* in the context menu.
The *Remove* dialog box appears.
3. Tap *YES* to confirm.

Result

The selected entry is removed in a background process.

Information

Tap *Background processes* in the tile navigation context menu to see the status of the background process. The *Active processes* area appears.

Data sets

Data sets enable you to enter data in a form and save it to ELO. You can also save data in forms without an Internet connection. You can transfer the data sets as soon as your device is connected to ELO.

Settings for transferring data sets

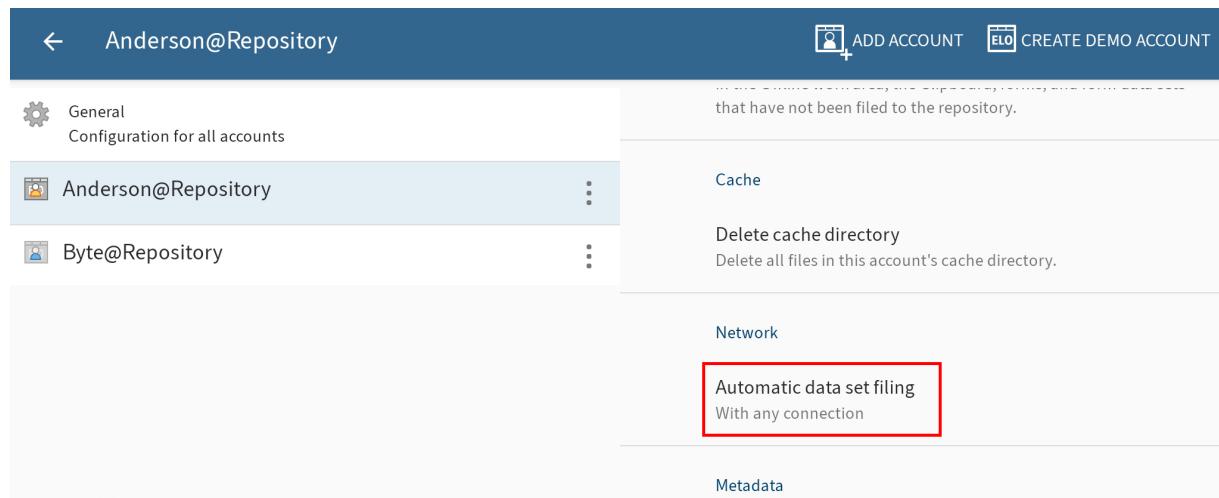
In the *Configuration* dialog box, you can decide when to automatically file data sets to ELO.

Method

1. Open the configuration via the *Tile navigation > Context menu*.

The *Configuration* dialog box opens.

2. Tap the account you want to make the settings for.



The configuration options for the selected account appear. The selected account is highlighted in blue.

3. In the *Network* area, tap *Automatic data set filing*.

The *Automatic data set filing* dialog box opens. Specify when data sets are automatically filed to ELO. You have the following options:

- With any connection: The data sets are transferred as long as the device is connected to the Internet.
- Only over Wi-Fi: The data sets are only transferred if a Wi-Fi connection is established.
- No automatic filing: The data sets are not filed automatically.

4. Tap the desired settings.

Result

The *Automatic data set filing* dialog box closes. Your changes have been applied.

Requirements

To work with data sets, you need a metadata form with the corresponding settings and a specific form.

Metadata form

When submitting data with the ELO app, all data is saved to a metadata form. Create a separate metadata form for each form you want to enter data with. To do so, use the [ELO Administration Console](#).

The layout of the metadata form depends on the data you want to submit. Use the metadata form to define:

- The fields for submitting data
- The filing path for the data sets (filing definition) you created
- Whether you can add one or multiple files to the data set (form type)

Fields

Add a field and the associated group for each data field that you want to include in the form. These fields are linked to the form. The user enters data to the fields via the form in the app.

Filing definition

Create a filing definition so that the data sets can be uploaded to ELO. The data sets cannot be filed to the repository without a filing definition.

Form type

The form type specifies whether the data set is created as a document or as a folder. You can select the following settings:

Usage > Folders: If this option is enabled, data sets are created as folders. You can attach multiple files to a data set. However, you do not have to attach a file. Attachments are filed with the *Basic entry* metadata form.

Usage > Documents: If this option is enabled, data sets are created as documents. You must attach a file. You cannot attach more than one file.

If both options are selected, the conditions for the *Usage - Documents* option will apply.

Form

You need a specific form to create a data set. You create this form using the ELO form designer in the ELO Administration Console or in the ELO Java Client.

Information

For detailed information on *forms*, refer to the [ELO Java Client Workflow](#) manual.

Please note

Data set forms are intended for offline use. This means you cannot use functions that require a connection to the ELO Indexserver, such as ELOas rules or dynamic keyword lists.

Please note

A data set form must be created as a separate template. Data set forms must not be divided into tab groups.

A data set form must meet the following criteria:

Form name: The name of the form must follow this pattern: `offline_<NAME>`. Replace `<NAME>` as required.

Template: The form requires a template. The name of the template must follow this pattern: `main_<NAME>`. Replace `<NAME>` as required.

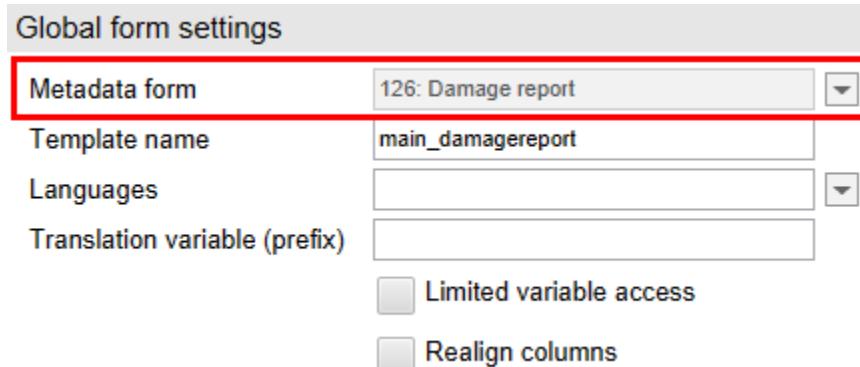
The names of the form and the template do not need to match.

Connecting metadata forms

You need to link the template to a suitable metadata form (see above).

Method

1. Open the template in the ELO form designer.



2. Open the *Metadata form* drop-down menu under *Global form settings*.
3. Select the metadata form you require.

Information

If the metadata form does not show up in the list, it is possible that the *ELOWf* module did not transfer the data to the client. Restart the module and the client. Afterwards, click *Refresh* in the form designer.

4. Tap *Apply* to apply your changes.

Alternative: The changes are also applied when you save the template.

Result

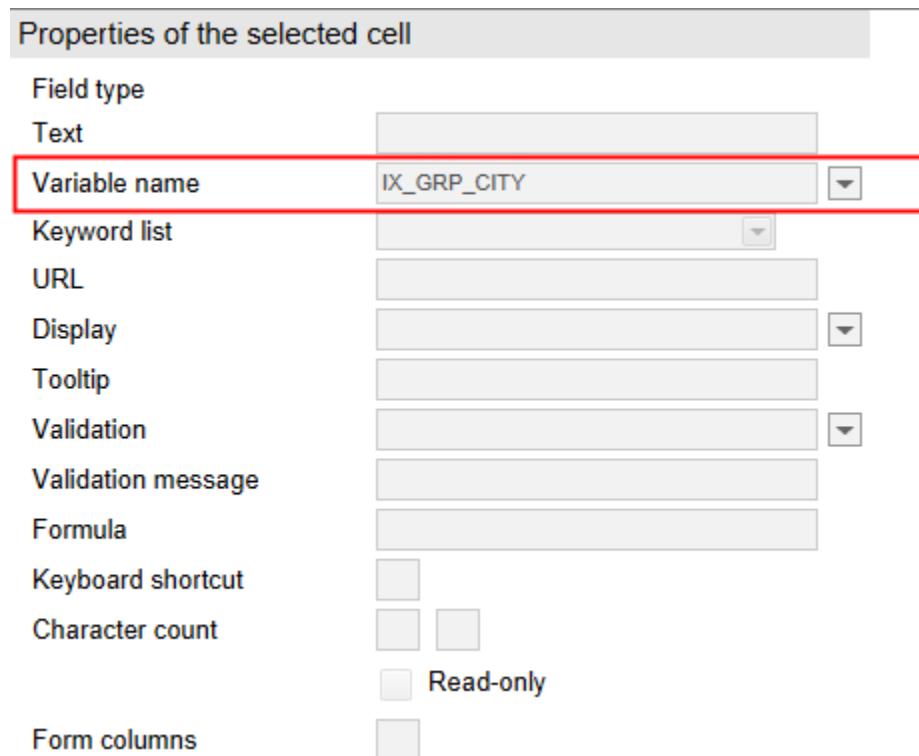
The name and the ID of the selected metadata form are grayed out in the *Metadata form* field.

Linking fields

To ensure that the data is applied to the metadata of the data set, you need to link each field form to a metadata field.

Link to a field as follows:

1. Open the template in the ELO form designer.
2. Click the line of the form that you want to link to a field.



3. Open the *Variable name* drop-down menu under *Properties of the selected cell*.
4. Select a field.

The name of the variable that establishes the connection to the field is located in the *Variable name* field.

5. Save the form once you have created and connected all form fields.

Result

You can now use the form to create data sets.

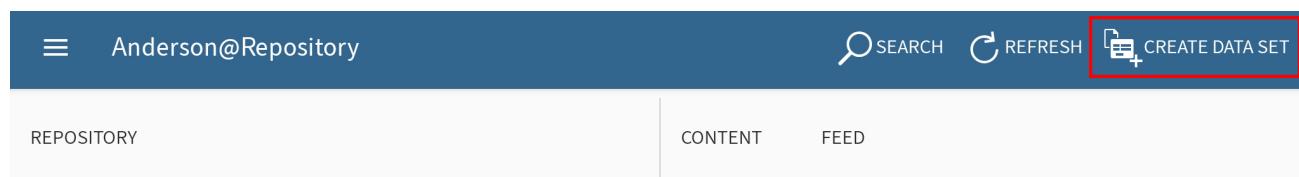
Create data set

To submit data to a form and add files, use the *CREATE DATA SET* function.

Requirements

You must have created a data set form in the ELO Java Client or the ELO Administration Console. Forms are automatically uploaded to and updated on your mobile device. Every three days, the system checks whether new forms exist or whether changes have been made to existing forms. If you reconnect or change your user account, forms are automatically downloaded and updated.

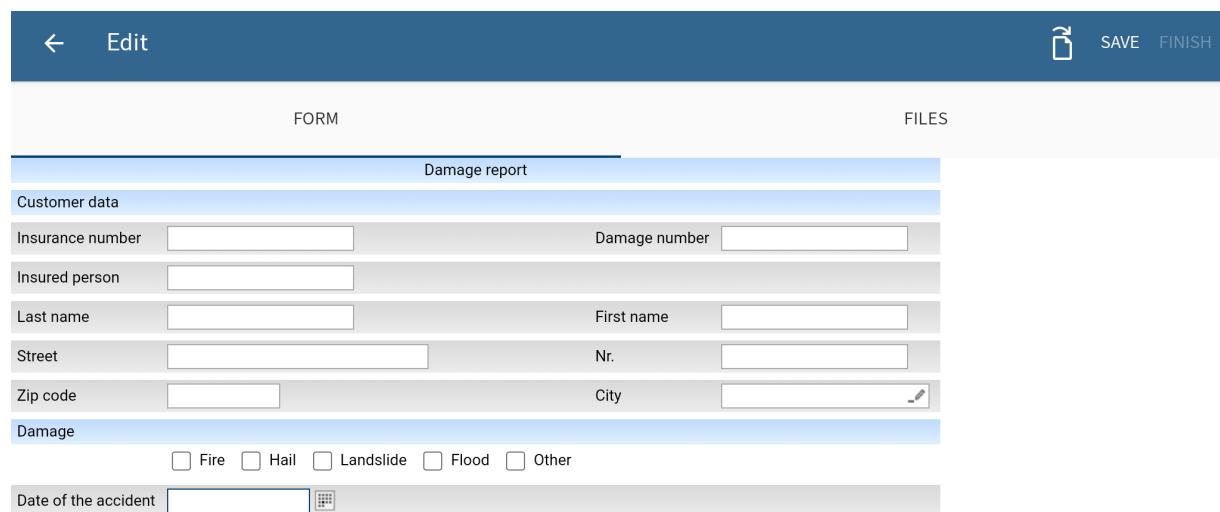
Method



1. Tap *CREATE DATA SET* on the action bar.

The *Select form* dialog box appears.

2. Tap the form that you want to fill out.



The *Edit* dialog box appears along with the selected form.

In this dialog box, you fill out the form, add files, save the data, and finalize the data set.

Fill out form

3. Tap the fields to fill out the form. The type of entry you need to make depends on the field type.

Add file

The number of files you can or need to add to a data set depends on the metadata form. Create the metadata form in the ELO Administration Console.

You can select the following metadata form options in the ELO Administration Console:

- Usage > Folders: If this option is enabled, data sets are created as folders. You can attach multiple files to a data set. However, you do not have to attach a file. Attachments are filed with the *Basic entry* metadata form.
- Usage > Documents: If this option is enabled, data sets are created as documents. You must attach a file. You cannot attach more than one file.

If both options are selected, the conditions for the *Usage > Documents* option will apply.

The screenshot shows the 'Edit' screen of the ELO mobile app. At the top, there's a blue header bar with a back arrow and the word 'Edit'. To the right of the header are three buttons: a document icon (with a red border around it), 'SAVE', and 'FINISH'. Below the header, the screen is divided into two main sections: 'FORM' on the left and 'FILES' on the right. The 'FORM' section contains a form titled 'Damage report'. It has several input fields grouped into sections: 'Customer data' (Insurance number, Damaged number, Insured person, Last name, First name, Street, Nr., Zip code, City), 'Damage' (checkboxes for Fire, Hail, Landslide, Flood, Other), and a date input field for 'Date of the accident'. The 'FILES' section is currently empty.

4. To add a file, tap the document icon on the action bar.

The *Select file* dialog box appears.

5. Select one of the following options to add a file:

- From file system: Opens the *Select file: Detected file systems* dialog box. Navigate through the folder structure on your device to select a file.
- With another app: Opens an external app you can use to upload files.
- Take a photo: Opens the camera app on your device to take a picture, which can be added to the data set.

6. Select a file.

The new file is displayed in the *Edit* dialog box on the *FILES* tab.

Remove added file

Optional: If the data set form was linked to a folder form, you can remove any attached files. Long tap the file you want to remove until the context menu opens. Tap the X icon in the context menu. The file is removed.

Change added file

Optional: If the data set form was linked to a document form, you cannot remove attached files. These data sets always require a file attachment. You can select another file to replace an existing attachment. Long tap the file you want to change until the context menu opens. Tap the document icon in the context menu and select a new file.

Save

Optional: If you have not finished completing a data set or do not want to upload it to the *Repository* work area yet, you can save it. Tap *SAVE*. The data set is saved in the *Data sets* work area. The data set has the status *Incomplete* and is not yet loaded to the *Repository* work area.

Information

Once you have completed a data set for transfer to the *Repository* work area, you can no longer edit it.

Finish

7. To complete a data set for transfer to the *Repository* work area, tap *FINISH*.

Result

Depending on the setting, the data set is automatically transferred to the *Repository* work area or stored in the *Data sets* work area with the status *Ready for transfer*.

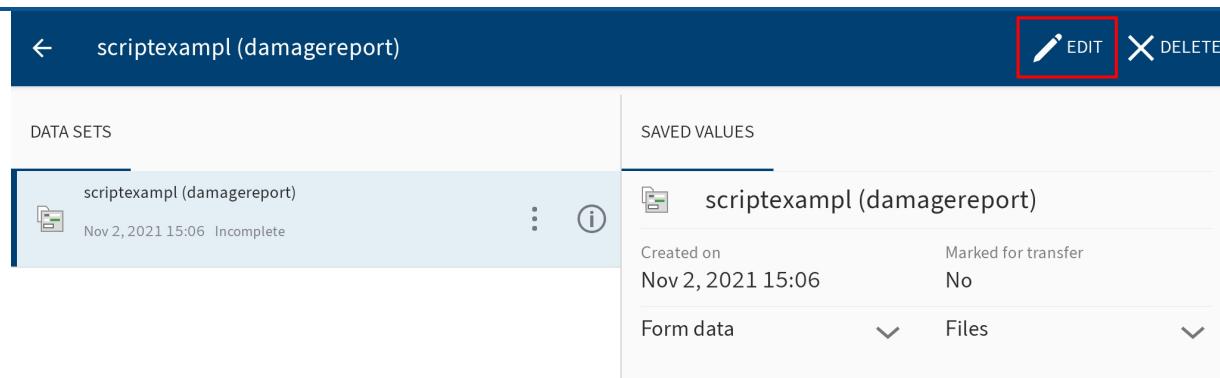
You can find more information in the sections [Automatically transfer data set](#) and [Manually transfer data set](#).

Edit data set

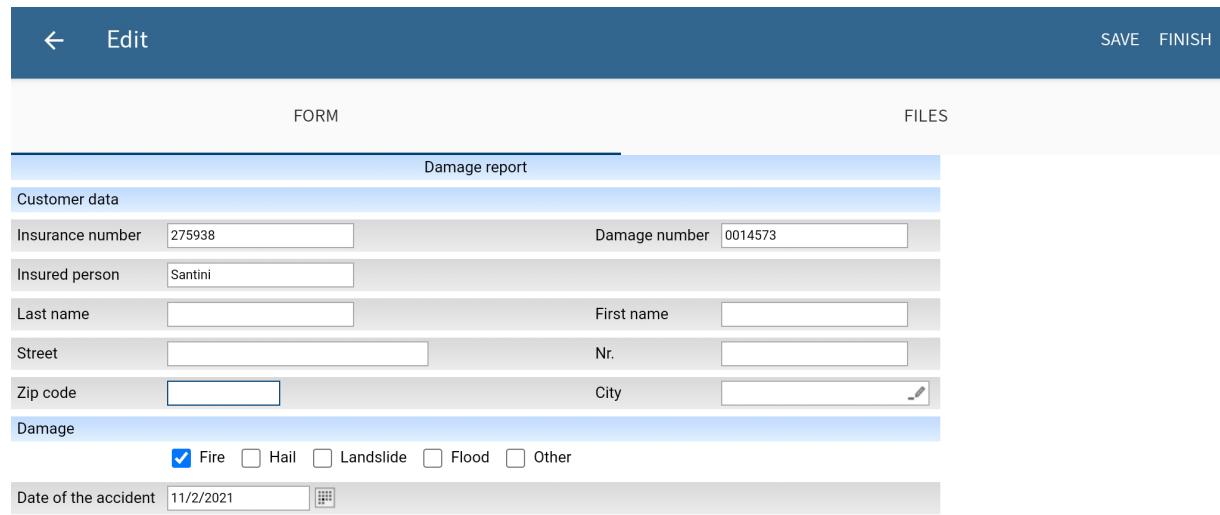
You can edit data sets that you have saved but not yet completed.

Method

1. Open the context menu for the data set.



2. Tap *EDIT* in the context menu.



The *Edit* dialog box appears.

3. Make the desired changes.

4. Tap *SAVE* to save the data set or *FINISH* to load the data set to the *Repository* work area.

Result

You have edited the data set.

Automatically transfer data set

You need to complete a data set before you can transfer it to the *Repository* work area. If your device is not connected to the Internet, the data set is saved in the *Data sets* work area. Completed data sets are loaded to the *Repository* work area as soon as your device is connected to the Internet.

Information

Once you have completed a data set for transfer to the *Repository* work area, you can no longer edit it.

Requirements

In the *Configuration* dialog box, the *Automatic data set filing with any connection* or *Automatic data set filing only over Wi-Fi* option must be enabled. You can find more information in the section [Settings for transferring data sets](#).

Method

The screenshot shows the 'Edit' dialog box for a 'Damage report'. The top bar has a back arrow, the title 'Edit', and buttons for 'SAVE' and 'FINISH' (which is highlighted with a red box). Below the bar, there are two tabs: 'FORM' and 'FILES', with 'FORM' selected. The form contains sections for 'Customer data' and 'Damage'. In the 'Customer data' section, fields include Insurance number (275938), Damage number (0014573), Insured person (Santini), Last name, First name, Street, Nr., Zip code, City, and a date field (11/2/2021) with a calendar icon. The 'Damage' section includes checkboxes for Fire (checked), Hail, Landslide, Flood, and Other. The bottom right corner of the dialog box has a small edit icon.

To complete a data set for transfer to the *Repository* work area, tap *FINISH* in the *Edit* dialog box.

Result

The *Edit* dialog box closes.

If your device is connected to the Internet, the data set is transferred to the *Repository* work area immediately. If your device is not connected to the Internet, the data set is saved in the *Data sets* work area. There, it is assigned the status *Ready for transfer*.

The screenshot shows the ELO mobile app interface. At the top, there's a header bar with the number '70' on the left and 'ELO mobile apps' on the right. Below the header, the main area has two sections: 'DATA SETS' on the left and 'SAVED VALUES' on the right. In the 'DATA SETS' section, there's a list item for 'scriptexampl (damagereport)' with a timestamp 'Nov 2, 2021 15:21'. A red box highlights the text 'Ready for transfer' next to the timestamp. In the 'SAVED VALUES' section, there's a detailed view for the same data set, showing it was created on 'Nov 2, 2021 15:21' and is 'Marked for transfer Yes'. It also lists 'Form data' and 'Files'.

Completed data sets are transferred to the *Repository* work area as soon as your device is connected to the Internet. The filing process generally starts automatically.

Once a data set is transferred to the *Repository* work area, it no longer appears in the *Data sets* work area. The data set can now be found at the specified location in the *Repository* work area. In the *Form* detail area in the viewer pane, you will see all information saved on the data set.

The screenshot shows the ELO mobile app interface. At the top, there's a header bar with the number '70' on the left and 'ELO mobile apps' on the right. Below the header, the main area has two sections: 'DOCUMENTS' on the left and 'CONTENT' on the right. In the 'DOCUMENTS' section, there's a list of documents, including 'Damage report (Jul 4, 2018 13:14:57)' and 'offline_scriptexamples(main_damagereport) (1...'. In the 'CONTENT' section, there's a list of items, including 'Damage report (Jul 4, 2018 13:14:57)' and 'Form: Damage report'. A red box highlights the 'Form: Damage report' detail area, which displays form fields like Insurance number (76983), Damage number (00012), LastName, FirstName, Insured person, Street, StreetNo, ZIPCode, City, Damage, and Date of accident (20180702). At the bottom, there's an 'Options' button.

Manually transfer data set

If automatic transfer of data sets is not enabled, you can manually start a transfer to the *Repository* work area. You need to complete a data set before you can transfer it to the *Repository* work area. The data set is saved in the *Data sets* work area.

Information

Once you have completed a data set for transfer to the *Repository* work area, you can no longer edit it.

Requirements

Your device must be connected to the Internet.

Method

The screenshot shows the 'Edit' dialog box for a 'Damage report'. The top bar has a back arrow, the title 'Edit', and buttons for 'SAVE' and 'FINISH' (which is highlighted with a red box). The main area is divided into 'FORM' and 'FILES' tabs. Under 'FORM', there are sections for 'Customer data' and 'Damage'. The 'Customer data' section contains fields for Insurance number (275938), Damage number (0014573), Insured person (Santini), Last name, First name, Street, Nr., Zip code, and City. The 'Damage' section contains checkboxes for Fire, Hail, Landslide, Flood, and Other, with 'Fire' checked. A date field shows 'Date of the accident' as 11/2/2021 with a calendar icon.

1. To complete a data set for transfer to the *Repository* work area, tap *FINISH* in the *Edit* dialog box.

The *Edit* dialog box closes.

The data set is saved in the *Data sets* work area. There, it is assigned the status *Ready for transfer*.

The screenshot shows the ELO mobile apps interface. At the top, there is a header bar with the user name "Anderson@Repository" and three icons: SEARCH, REFRESH, and CREATE DATA SET. Below the header, there are two main panes: "DATA SETS" on the left and "SAVED VALUES" on the right. In the "DATA SETS" pane, there is a single item: "scriptexampl (damagereport)" created on Nov 2, 2021 15:21, with the status "Ready for transfer". In the "SAVED VALUES" pane, there is also one item: "scriptexampl (damagereport)" with the same creation date and status. The "Marked for transfer" field is set to "Yes".

2. Open the context menu for the data set.

This screenshot shows the same interface as above, but with a context menu open over the "scriptexampl (damagereport)" item in the "DATA SETS" pane. The menu items are "TRANSFER" (highlighted with a red box) and "DELETE". The rest of the interface remains the same, showing the "SAVED VALUES" pane with the same data.

3. Tap *TRANSFER* in the context menu.

Result

The data set is loaded to the *Repository* work area.

Once a data set is transferred to the *Repository* work area, it no longer appears in the *Data sets* work area. The data set can now be found at the specified location in the *Repository* work area. In the *Form* detail area in the viewer pane, you will see all information saved on the data set.

The screenshot shows the ELO mobile app interface. At the top, there is a header bar with the number '73' on the left and 'ELO mobile apps' on the right. Below the header is a navigation bar with three horizontal bars, the text 'Anderson@Repository', and icons for 'SEARCH', 'REFRESH', and 'CREATE DATA SET'.

The main content area has two tabs: 'DOCUMENTS' and 'INVOICES' on the left, and 'DAMAGE REPORT' on the right, which is currently selected. On the left, there is a list of documents with icons, names, and dates. The first document is 'Damage report (Jul 4, 2018 13:14:57)' by Administrator on Jul 4, 2018 13:15. The second document is 'Damage report (Jul 4, 2018 13:43:49)' by Administrator on Jul 4, 2018 13:46. The third document is 'offline_scriptexamples(main_damagereport) (1...)' by Cole on Oct 18, 2018 11:16. The fourth document is 'Scan_20200513840284' by Administrator on May 12, 2020 20:26.

On the right, under 'CONTENT', there is a list of items. The first item is 'Damage report (Jul 4, 2018 13:14:57)' by Administrator on Apr 9, 2021 14:52, with a file size of 11.1 KB. Below this is a detailed view of the 'Damage report' form, which is highlighted with a red border. The form fields include:

- Insurance number: 76983
- Damage number: 00012
- Last Name
- First Name
- Insured person
- Street
- Street No
- ZIP Code
- City
- Damage
- Date of accident: 20180702

At the bottom of the detailed view, there is a 'Options' button with a dropdown arrow.

Delete data set

You can delete data sets that you do not want to transfer to the *Repository* work area.

Method

1. Open the context menu for the data set.

The screenshot shows the ELO mobile app interface with a context menu open for a data set named 'scriptexAMPL (damagereport)'. The menu has two main sections: 'DATA SETS' and 'SAVED VALUES'.

In the 'DATA SETS' section, there is a list of data sets. The first data set is 'scriptexAMPL (damagereport)' created on Nov 2, 2021 15:21, with the status 'Ready for transfer'. There is a context menu icon (three dots and a circle) next to it.

In the 'SAVED VALUES' section, there is a list of saved values for the same data set. The first saved value is also 'scriptexAMPL (damagereport)'. It shows details such as 'Created on Nov 2, 2021 15:21' and 'Marked for transfer Yes'. Below this, there are sections for 'Form data' and 'Files'.

At the top right of the context menu, there are two buttons: 'TRANSFER' and 'DELETE'. The 'DELETE' button is highlighted with a red border.

2. Tap *DELETE* in the context menu.

Result

You have deleted the data set.

Feed

ELO offers several functions that support collaboration within your company. The ELO feed is a chat-based tool that provides a great way to exchange information on an entry.

Posts related to an entry are shown on the *FEED* tab. In the feed, you can comment on posts, mention colleagues, link posts, and categorize topics using hashtags.

The screenshot shows the ELO mobile application interface. At the top, there is a header bar with the user name "Lind@Repository". On the right side of the header are three icons: a magnifying glass for "SEARCH", a circular arrow for "REFRESH", and a plus sign inside a square for "CREATE DATA SET". Below the header, the main content area has a dark blue header with tabs for "CONTENT" and "FEED". The "FEED" tab is currently selected. On the left, there is a sidebar with navigation links: "HISTORY", "ORGANIZATION DEPART...", and "COMPANY PARTY". A date selector shows "2021". Below the sidebar, there is a list item for "Planning" with a document icon, the author "Lind", and the timestamp "Nov 2, 2021 15:51". To the right of the sidebar, there is a "Create a post" input field with a microphone icon. The main feed area displays two posts. The first post is from "Byte" (represented by a blue profile picture) and says "Byte saved a new working version of this document." It includes a thumbnail of the document and a link "Version 2 New item in list". This post was made "a minute ago" and has a "Comment" button. The second post is from "Lind" (represented by a grey profile picture) and says "@GRP_STANDARD Please enter your name on the list! #companyparty". This post was made "3 minutes ago" and has a "Comment" button. There are also small icons for sharing and deleting posts.

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

The following message types are shown in the feed:

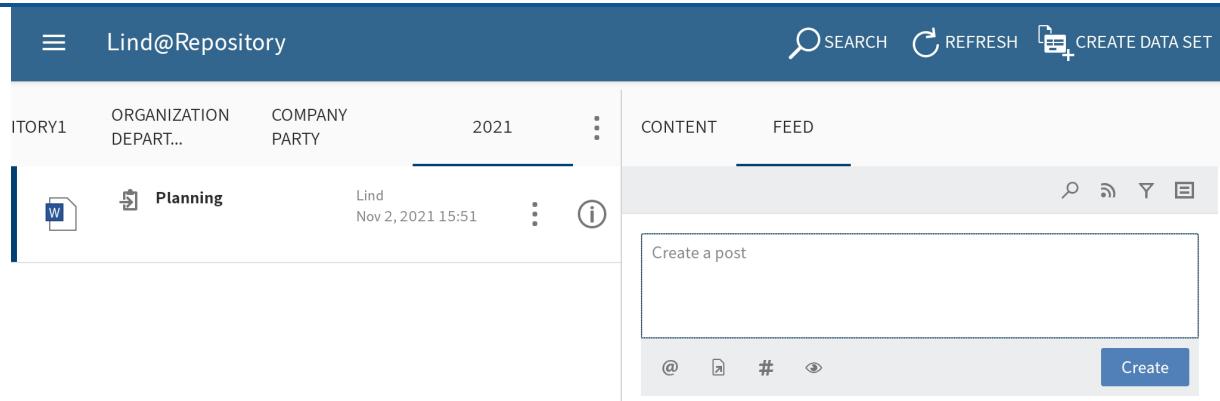
- Posts (written by a user)
- Comments (on a post)
- Events (e.g. when a new version of a document is filed or changes are made to the working version)

Create post

To exchange information on an entry, you can create a feed post.

Method

1. Tap the *Create a post* input field on the *FEED* tab.



The input field opens. The on-screen keyboard appears.

2. Enter your text.

Tap the icons below the input field to add to your post. You have the following options:

- Mention: Use the @ icon to address your feed post directly to another user or group. The users mentioned can see the feed post in their *My ELO* work area.
- Reference: Use the document icon with an arrow to link your feed post with an entry in ELO. Tapping the reference automatically takes the user to the filing location of the linked entry.
- Hashtag: Tap the # symbol to add hashtags to a post. Users can subscribe to hashtags. You can also filter the *My ELO* work area by hashtags.
- Visibility: Use the eye icon to restrict who can read your post. You can apply this restriction for future feed posts. Tap the *Remember selected visibility* radio button. Your visibility settings will be set as the default for new feed posts.

3.

To upload your post, tap the *Create* button.

Result

Your post appears in the feed.

Edit post

You can change your own posts later on.

Method

The screenshot shows the ELO mobile app's feed screen. At the top, there are navigation icons for SEARCH, REFRESH, and CREATE DATA SET. Below the header, there are tabs for CONTENT and FEED, with FEED selected. The main area displays a timeline of posts. One post from 'Lind' is highlighted with a red box around the edit icon (pencil). The post content is: 'Byte saved a new working version of this document.' Below it, another post from 'Lind' says: '@GRP_STANDARD Please enter your name on the list! #companyparty'. The edit icon for this post is also highlighted with a red box.

1. Tap *Edit* (pencil icon).

Editing mode is enabled.

2. Make the desired changes.

3. To save your changes, tap *Save*.

Result

Your changes are applied.

Comment on post

You can enter a comment on any post.

Information

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

Method

1. Tap *Comment* below the post.

The input field opens. The on-screen keyboard appears.

2. Enter a comment.

Tap the icons below the input field to add to your comment. You have the following options:



Mention: Use the @ icon to address your feed post directly to another user or group.

The users mentioned can see the feed post in their *My ELO* work area.

- Reference: Use the document icon with an arrow to link your feed post with an entry in ELO. Tapping the reference automatically takes the user to the filing location of the linked entry.
- Hashtag: Tap the # symbol to add hashtags to a post. Users can subscribe to hashtags. You can also filter the *My ELO* work area by hashtags.

3.
 - Tap *Create* to post your comment.

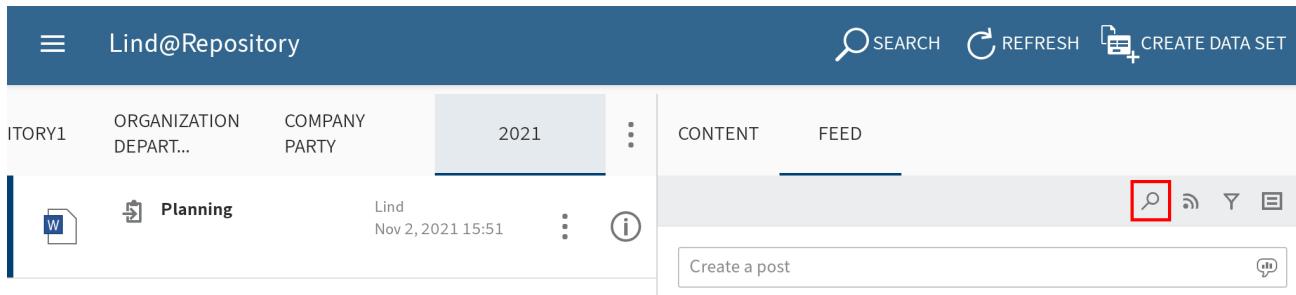
Result

Your comment shows up in the feed under the corresponding post.

Search feed

Tap the *Search feed* button (magnifying glass icon) to search within the selected feed. When the search is completed, you will only see posts containing the search term in the feed.

Method



1. Tap the magnifying glass icon.

The search input field opens.

2. Enter the search term to the input field.

3. Tap the magnifying glass icon to start the search.

Result

When the search is completed, you will only see posts containing the search term in the feed. The matches are highlighted in yellow.

Optional: To return to the normal feed after a search, tap the X icon in the search field.

Add filter

You can search the feed for specific terms as well as filter it by specific criteria.

Method

1. Tap the filter icon.

The filters appear below the input field.

You can select the following filters:

- Post author: Only posts created by the selected user are shown.
- Post type: Only posts of the selected type are shown.
- Hashtag: Only posts containing the selected hashtag are shown.
- 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, tap *is/is not* next to the filter category.

2. Tap the filter you want to apply. You can select multiple filters.

Result

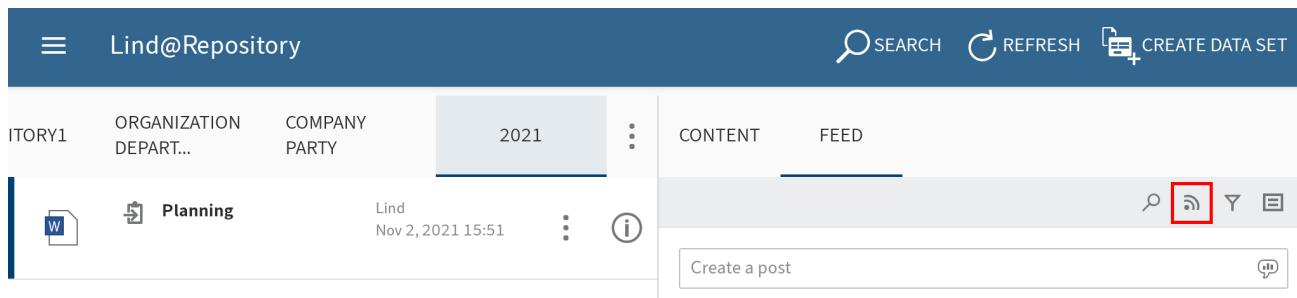
The selected filter is highlighted and marked with a check mark. The result of the applied filter appears in the feed.

Optional: To clear all filters, tap *Reset filters* (arrow icon).

Subscribe to feed

To be notified of any updates in a feed, you can subscribe to the feed.

Method



To subscribe to a feed, tap the *Subscribe* button in the feed.

Result

You have subscribed to the feed. The *Subscribe* button is marked with a check.

All subscribed feeds are listed in the *My ELO* work area. Once a new post is added to a subscribed feed, you see the new post in your *My ELO* work area.

Information

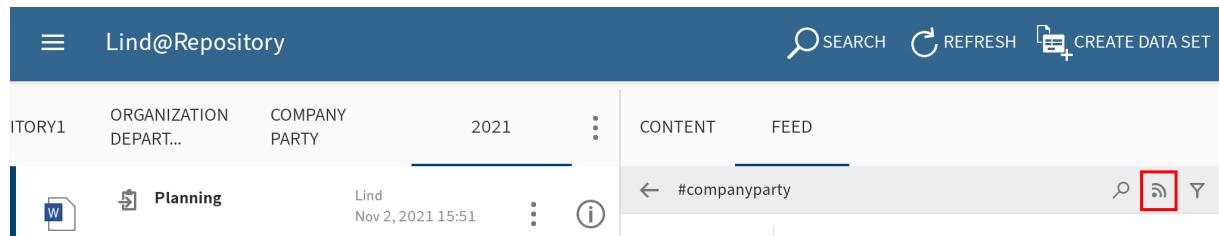
You can automatically subscribe to feeds. This applies to specific events that are triggered by a user. You can enable the automatic feed subscription options in *My ELO > Settings > My ELO settings*.

Subscribe to a hashtag

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

Method

1. To subscribe to a hashtag, tap it in a post.



You will see an overview of posts with this hashtag.

2. Tap *Subscribe* (antenna icon) in the upper bar.

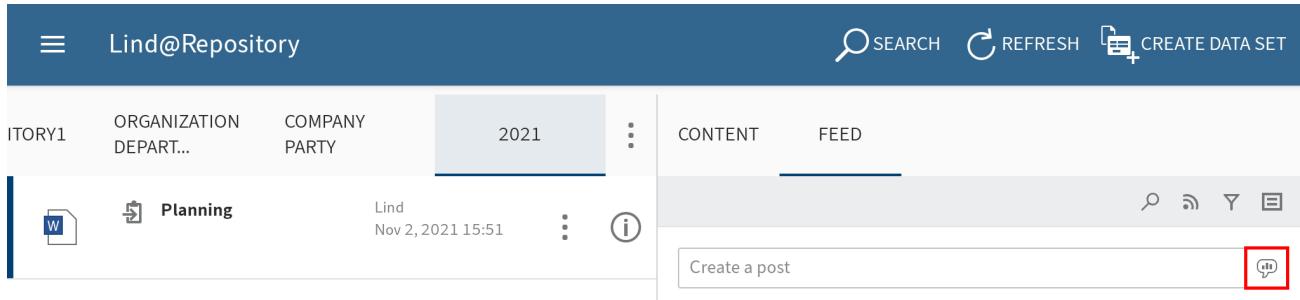
Result

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

Create a poll

You can create user polls on the *FEED* tab.

Method



1. Tap the *Create poll* button.

The *Create poll* area opens.

2. Create the poll. You have the following options:

- Ask a question: Enter a question to the input field.
- Add answer option: Enter answer options to the input fields. Insert a new input field with the *Add new answer* button. Tap the X icon to delete an answer option.
- Poll duration: You can select how long you want the poll to remain open in the drop-down menu.
- Additional options: 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.

Tap the icons below the input field to add to your poll. You have the following options:

- Mention: Use the @ icon to address your poll directly to another user or group. The users mentioned can see the poll in their *My ELO* work area.
- Reference: Use the document icon with an arrow to link your poll to an entry in ELO. Tapping the reference automatically takes the user to the filing location of the linked entry.
- Hashtag: Tap the # symbol to add hashtags to your poll. Users can subscribe to hashtags. You can also filter the *My ELO* work area by hashtags.
- Visibility: Use the eye icon to restrict who can read your poll. You can apply this restriction for future polls. Tap the *Remember selected visibility* radio button. Your visibility settings will be set as the default for new polls.

3. Tap *Create* to start the poll.

Result

The poll shows up in the feed.

Information

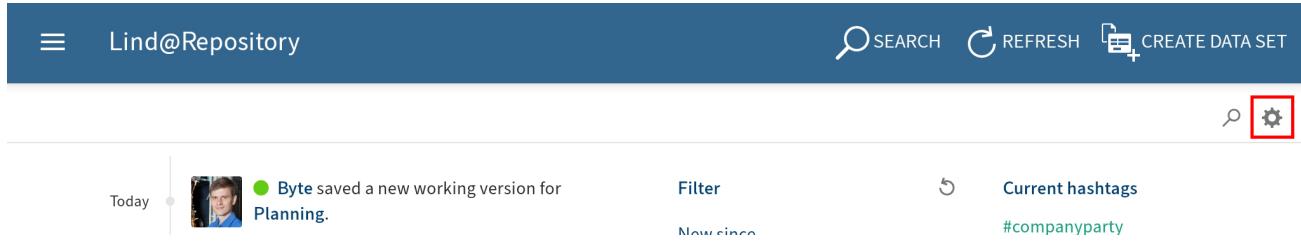
Once a user has taken a poll, it can no longer be modified.

My ELO

Feed posts for different entries are listed in the *My ELO* work area. For example, you will see posts from subscribed feeds or posts you were mentioned in. You will also find an overview of your workflows and current hashtags in *My ELO*.

Settings

In the *Settings* area, you can configure the *My ELO* work area. You will also find an overview of hashtags you have subscribed to and polls you have started.



Tap the *Settings* button (gearwheel icon) in *My ELO* to open the *Settings* area.



In the *Settings* area, you have the following options:

My ELO settings

Automatically subscribe to the feed: Specify when you want to automatically subscribe to a feed.

Number of seconds to display the "Undo" button: If you delete a feed post from *My ELO*, the *Undo* button appears. This button enables you to undo the delete action. You specify how many seconds the *Undo* button will be displayed for after removing a post.

Remove all posts from My ELO: If you no longer want to see feed posts in *My ELO*, you can hide them. The *Remove all posts from My ELO* button hides all feed posts in your *My ELO* work area. Posts you have marked as important are not removed.

Information

The *Remove all posts 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.

My subscribed hashtags

Search for hashtag: You can search for hashtags in ELO. Enter the hashtag you are looking for to the input field or select a hashtag from the drop-down menu. Tap a hashtag to view an overview of feed posts with the selected hashtag.

Subscribed hashtags: Here is a list of all the hashtags you have subscribed to. Tap a hashtag to view an overview of feed posts with the subscribed hashtag. Tap the antenna icon with the check mark to delete the subscription.

My polls

Here is a list of polls you have started. Tap a poll in the list to go to the poll.

Feed

In the *My ELO* feed, you will find an overview of all feed posts relevant to you. You will see posts from subscribed feeds and posts you were mentioned in. Posts older than one month do not show up. New feed posts are denoted with a green dot.

Today

Byte saved a new working version for Planning.

New item in list

9 minutes ago

Comment

Lind > Planning
@GRP_STANDARD Please enter your name on the list! #companyparty

11 minutes ago

Comment

Filter

New since

- Today
- Yesterday
- One week
- One month

Form is

- Basic entry
- Working version changed

Post author is

- Byte
- Lind

Post type is

- User post
- Working version changed

Hashtag is

- #companyparty

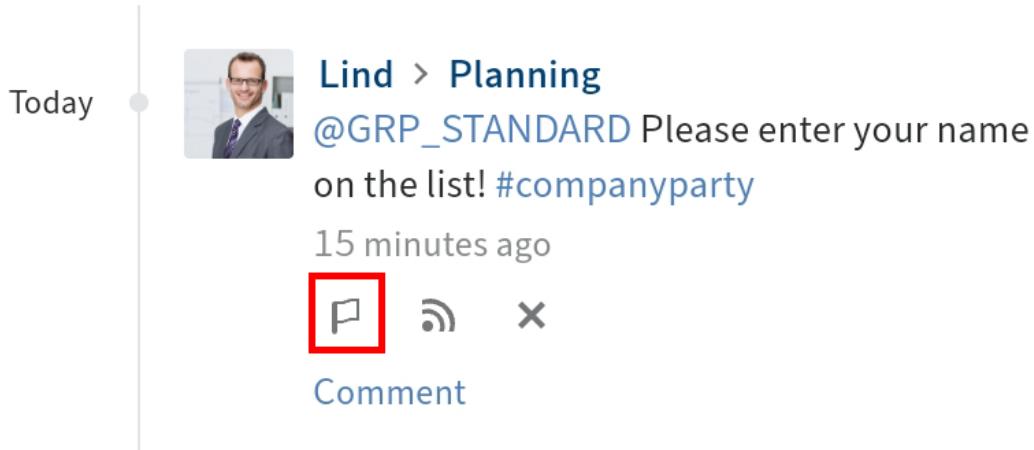
SEARCH REFRESH CREATE DATA SET

CREATE DATA SET

SEARCH REFRESH

Mark post as important

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.



To show a post permanently in *My ELO* tap the *Mark as important* button.

You can recognize posts that are marked as important by the red flag icon. The post remains in the *My ELO* area even if it is more than a month old.

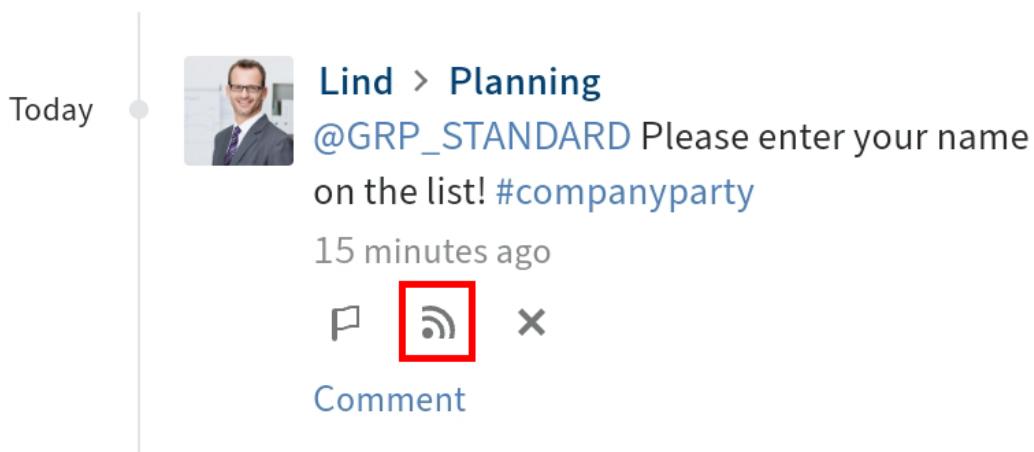
Remove marker

To delete the marker, tap 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.

Subscribe to feed

In the *My ELO* work area, posts from feeds you are not subscribed to, but were mentioned in, are also shown. You can subscribe to these feeds in *My ELO*.

Method



Tap the *Subscribe* button.

Result

You have subscribed to the feed. The check mark indicates this.

All subscribed feeds are listed in the *My ELO* work area. Once a new post is added to a subscribed feed, you see the new post in your *My ELO* work area.

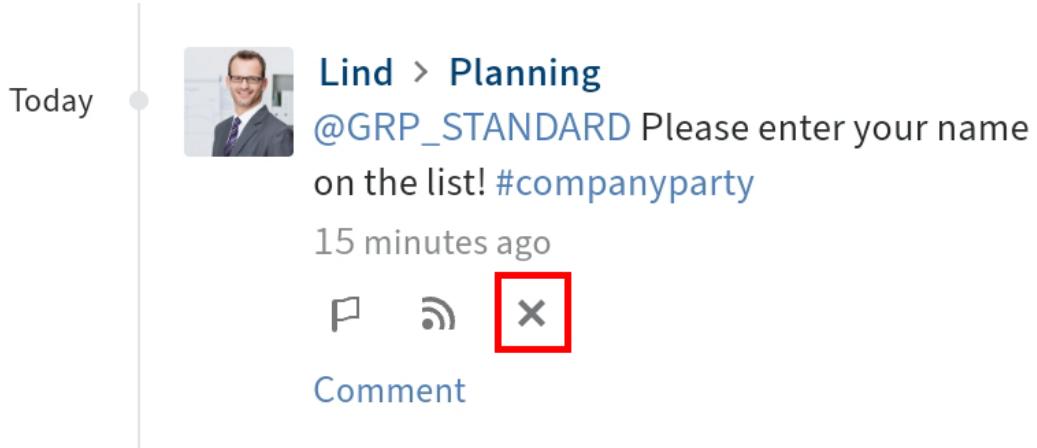
Hide post

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

Information

The *Remove all posts 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.

Method



Tap the *Remove from My ELO* button (x icon) to hide a post in your *My ELO* work area.

Result

This post will be removed from My ELO.

Undo

The post is removed from *My ELO*. To show the post again, tap *Undo*.

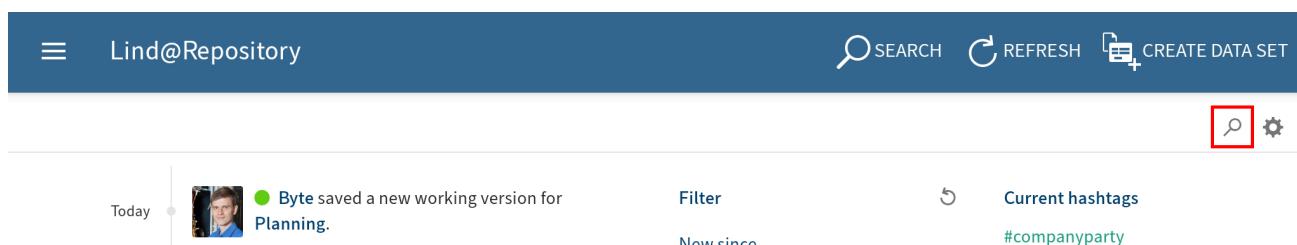
Information

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

Search feed

Tap the *Search feed* button (magnifying glass icon) to search within the displayed feed. When the search is completed, you will only see posts containing the search term in the feed.

Method



1. Tap the magnifying glass icon.

The search input field opens.

2. Enter the search term to the input field.

3. Tap the magnifying glass icon to start the search.

Result

When the search is completed, you will only see posts containing the search term in the feed. The matches are highlighted in yellow.

Optional: To return to the normal feed after a search, tap the X icon in the search field.

Filters

You can search the feed for specific terms as well as filter it by specific criteria.

The screenshot shows the ELO mobile app interface. At the top, there's a header bar with the text "Lind@Repository". To the right of the header are three icons: a magnifying glass for "SEARCH", a circular arrow for "REFRESH", and a "CREATE DATA SET" icon. Below the header is a search bar with a magnifying glass icon and a gear icon for settings.

The main area displays a feed of posts. The first post is from "Byte" saved a new working version for "Planning" at "9 minutes ago". The second post is from "Lind" (@GRP_STANDARD) asking to enter their name on a list with the hashtag "#companyparty" at "11 minutes ago". Both posts have "Comment" and "X" options below them.

To the right of the feed is a sidebar with a red border containing various filters:

- Filter**
- New since** (radio buttons for Today, Yesterday, One week, One month; One week is selected)
- Form is** (checkboxes for Basic entry, 2 items selected)
- Post author is** (checkboxes for Byte, Lind, 1 item selected each)
- Post type is** (checkboxes for User post, Working version changed, 1 item selected each)
- Hashtag is** (checkbox for #companyparty, 1 item selected)

On the far right of the sidebar, there are sections for "Current hashtags" (#companyparty), "Escalated workflow" (1 item), "Claims" (First check, Lind), and "My recently started workflows" (Incoming Invoice under 5000€, Cole).

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*.
- Form: Filter the feed by the metadata form of the entry.
- 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: Filter the feed by posts directly related to you, such as posts you were 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, tap *is/is not* next to the filter category.

Apply filters

Method

To apply a filter, tap the filter in the list. You can select multiple filters in all areas except *New since*.

Result

The selected filter is highlighted and marked with a dot or check mark. You will now only see the filtered posts.

This screenshot shows the ELO mobile app's feed screen. At the top, there is a header bar with the user name "Lind@Repository". On the right side of the header are three buttons: "SEARCH", "REFRESH", and "CREATE DATA SET". Below the header is a search bar with a magnifying glass icon and a gear icon. Underneath the search bar, there is a timeline entry: "Today Byte saved a new working version for Planning." To the right of this entry are several filter options: "Filter", "Now since", and "Current hashtags #companyparty". The "Current hashtags" button has a red box drawn around it, indicating it is the selected filter.

Optional: To clear all filters, tap *Reset filters* (arrow icon).

Hashtags

This screenshot shows the ELO mobile app's feed screen with a different set of posts. The top header bar shows "Lind@Repository". The right side includes "SEARCH", "REFRESH", and "CREATE DATA SET" buttons, along with a search bar and gear icon. The main feed area displays two posts: one from "Byte" and one from "Lind". The post from "Lind" is highlighted with a blue box. To the right of the feed are various filter settings. A large red box highlights the "Current hashtags" section, which contains the tag "#companyparty". Other filter sections include "Filter", "New since" (with radio buttons for "Today", "Yesterday", "One week", and "One month"), "Form is" (with checkboxes for "Basic entry" and "Working version changed"), "Post author is" (with checkboxes for "Byte" and "Lind"), "Post type is" (with checkboxes for "User post" and "Working version changed"), and "Hashtag is" (with a checkbox for "#companyparty").

You will find an overview of hashtags currently in use in your company repository in *My ELO*.

Tap a hashtag to view an overview of feed posts with the selected hashtag.

Workflows

Today

Byte saved a new working version for Planning.

New item in list

9 minutes ago

[Comment](#)

Lind > Planning @GRP_STANDARD Please enter your name on the list! #companyparty

11 minutes ago

[Comment](#)

Filter

New since

- Today
- Yesterday
- One week
- One month

Form is

- Basic entry

Post author is

- Byte
- Lind

Post type is

- User post
- Working version changed

Hashtag is

- #companyparty

Current hashtags

#companyparty

Escalated workflow

Claims
First check, Lind

My recently started workflows

Incoming Invoice under 5000€, Cole

In the *My ELO* work area, you will see which workflows you recently started and who is currently processing the task. You will also find an overview of escalated workflows you are involved in.

Tap a workflow to go to the selected workflow in the *Tasks* work area.

Edit user profile

Feed posts are marked with the name and profile picture of the author. You can edit your profile.

Method

Lind@Repository

← Settings

> My ELO settings

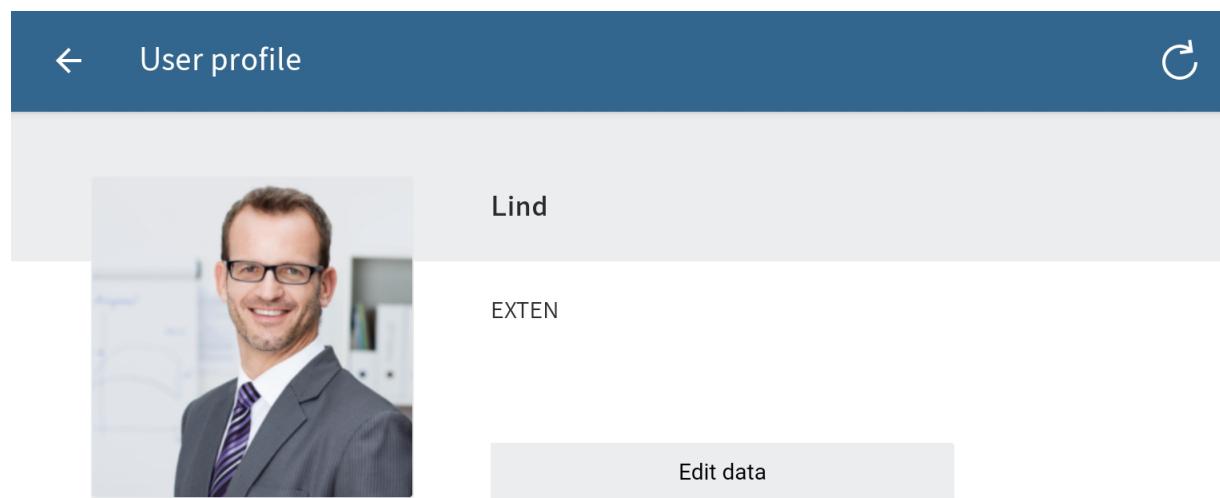
> My subscribed hashtags

> My polls

1.

To open your profile, in *My ELO*, tap *Settings (gear icon)* > *My profile (gray person icon at the top right)*.

Alternative: In the feed, tap your profile picture or user name to open your user profile.



The *User profile* dialog box opens.

2. Tap *Edit data* to edit your profile.

Editing mode is enabled.

3. Make the desired changes.

4. Tap *Save* to apply your changes.

Result

Your changes are applied. You are now back in the profile overview.

View user profile

For more information on a user, you can view their profile.

Method

Today

 **Lind** > Planning
@GRP_STANDARD Please enter your name
on the list! #companyparty
15 minutes ago

[Comment](#)

In the feed, tap the image or the user's name to see their profile.

Result

The user profile opens.

Optional: To close the user profile, tap *Back* (arrow icon) on the menu bar.