ELO packages

Users and groups

2

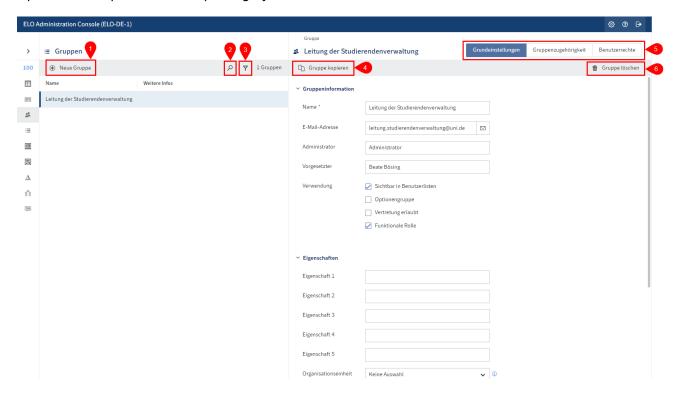
Table of contents

Groups	3
Overview	3
Create group	5
Configuration	6

Groups

Overview

Open the Groups area in the package you want to edit.



The *Groups* area offers the following actions:

- 1 Create group
- 2 Perform search
- 3 Define filter
- 4 Copy group: All configurations are applied, with the exception of the *Name* and *E-mail address* fields.
- 5 Perform configuration: Via the Basic settings, Group membership, and User rights tabs

6Delete group

Delete group

Please note

When you delete a group, it is deleted permanently.

4 ELO packages

Do not delete any groups that have already been used in ELO. This can lead to inconsistencies. In this case, it is better to change the basic settings of the group instead of deleting the group:

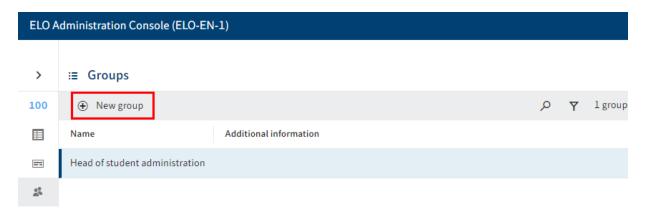
• Disable Visible in user lists

The group now only exists in the background in ELO. The rights assigned via the group are maintained and previous actions with this group, such as participation in workflows, are still visible in ELO.

Create group

To create a new group, proceed as follows:

- 1. Select the package you want to edit.
- 2. In this package, open the *Groups* area.



3. Select New group.

The *Group* area opens.



4. Configure the new group. Navigate to the *Basic settings, Group membership,* and *User rights* tabs to do so.

For more information, refer to the Configuration chapter.

5. Once you are finished with configuration, select Save group to save it.

You have created a new group.

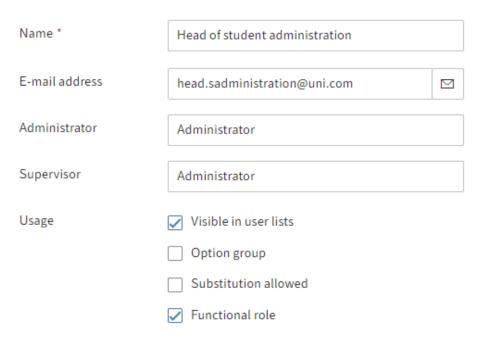
Configuration

Define basic settings

In the Basic settings area, you define the Group information, Properties, and additional Information.

Group information

Group information



- Name: Mandatory field. This can be changed later.
- E-mail address: Displayed in the user profile in the client and can be used in workflows, forms, and scripts.
- Administrator: The name of the account used to create the new group is automatically entered. This can be changed later. Determines who can edit the master data of the group.
- Supervisor: Can be used in workflows, forms, and scripts. If this field is left blank, the content of the *Name* field is used.
- Use:
 - Visible in user lists: If this option is enabled, the group will show up in dialog boxes in the ELO client. If the option is disabled, the group still exists in ELO, but users without administrator privileges are unable to select them in dialog boxes.
 - Option group: Option groups are defined for the purpose of assigning specific *ProfileOpts*. Only these groups show up in dialog boxes where settings are made for other ELO accounts.

You will find more information on option groups under <u>Configuration and administration > User administration > Groups > Configuration > Option groups</u>.

- Substitution allowed: You can control how rights are distributed via the substitution module. For groups that have the substitution right, rights can be transferred to substitutes.
- Functional role: If this option is enabled, members of this group are asked during logon whether they want to assume the functional role for the current session. This allows users to decide whether they want to use ELO in a specific role.

Properties

~	Properties		
	1 property		
	2 property		
	3 property		
	4 property		
	5 property		
	Organizational unit	None 🗸	(i)

- Property 1-5: Information can be evaluated using scripts.
- Organizational unit: You will find relevant information under <u>Configuration and administration</u>
 <u>User administration</u> > <u>Additional Configurations</u> > <u>Organizational units</u>.

Information

Information

Description The student administration is the point of contact

for students for all questions relating to the

formal studying process.

Last changed on 19.06.2023 15:31

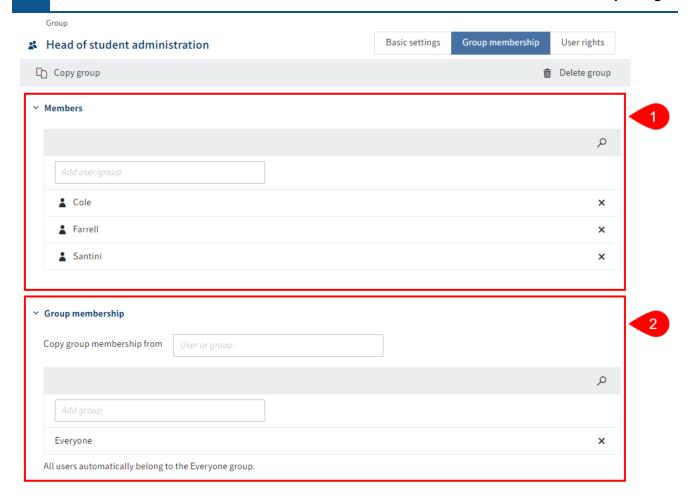
GUID (9FD10CD2-B8BA-4433-F09A-A7989D684BAD)

• Last changed on: Is updated automatically.

• GUID: Each group is automatically assigned a GUID. The GUID can be used to address the group in other functions.

Define group membership

In the *Group membership* area, you can assign members to the group and define the group membership in existing groups.



- 1 Members: Add existing users or groups as members
- 2 Group membership: With the *Copy group membership from* field, you can inherit existing group memberships from other groups or users. Group memberships can also be added manually. The *Everyone* group is entered by default.

Information

Groups can be incorporated into other groups. This allows you to implement complex combinations of rights settings and permissions concepts.

Information

If you type a space in an input field, the entire list of available users and groups will be displayed.

Assign user rights

Under *User rights*, you assign the rights associated with the group membership.

ELO packages

Group Head of student administration	Basic settings Group membership User rights
Copy group	☆ Delete group
Copy user rights from User or group	
User manager	Folder/document permissions
Main administrator	Edit folders
Edit user data	Edit documents
Change password	Edit permissions (1)
SAP administrator	☐ View all entries, ignore permissions
DMS Desktop user, no workflows ①	☐ Import permission
ELO Desktop Client Plus user	Export permission
ELOxc Client user, e-mails only	
Change metadata form after filing Edit keyword lists Edit retention period Change document status Change document paths (1) Author for approval documents Show "Additional information" tab	Delete folders Delete documents Delete non-modifiable documents Delete versions (i)
Workflows Manage workflows Start workflows Extend workflow rights View workflows for all users	System settings Edit master data Edit scan profiles Use debugger Edit metadata forms and fields Assign replication sets

- 1 Copy user rights from: Inherit the user rights from another group or user
- 2 User rights: You will find more information under <u>Configuration and administration > Rights in ELO > User rights</u>.