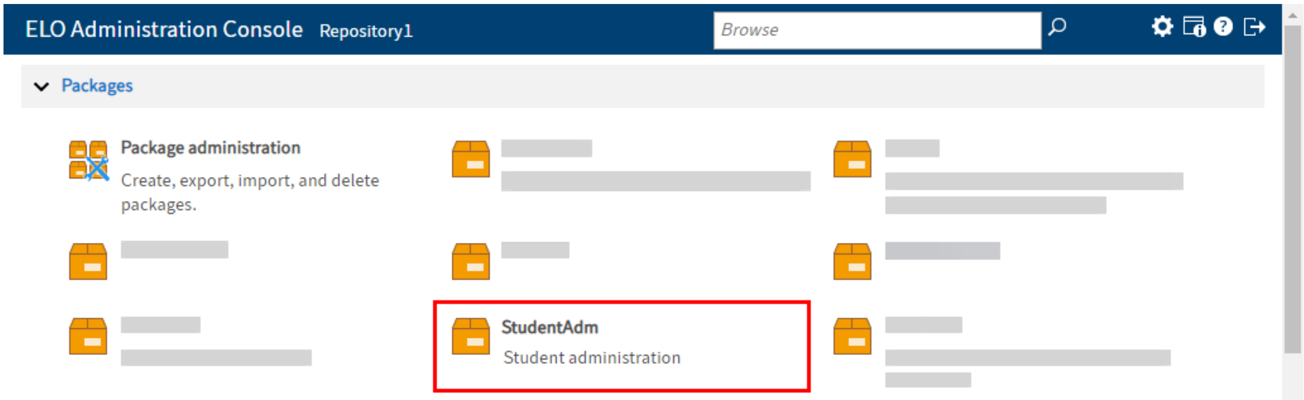
ELO packages

ELO Workspaces

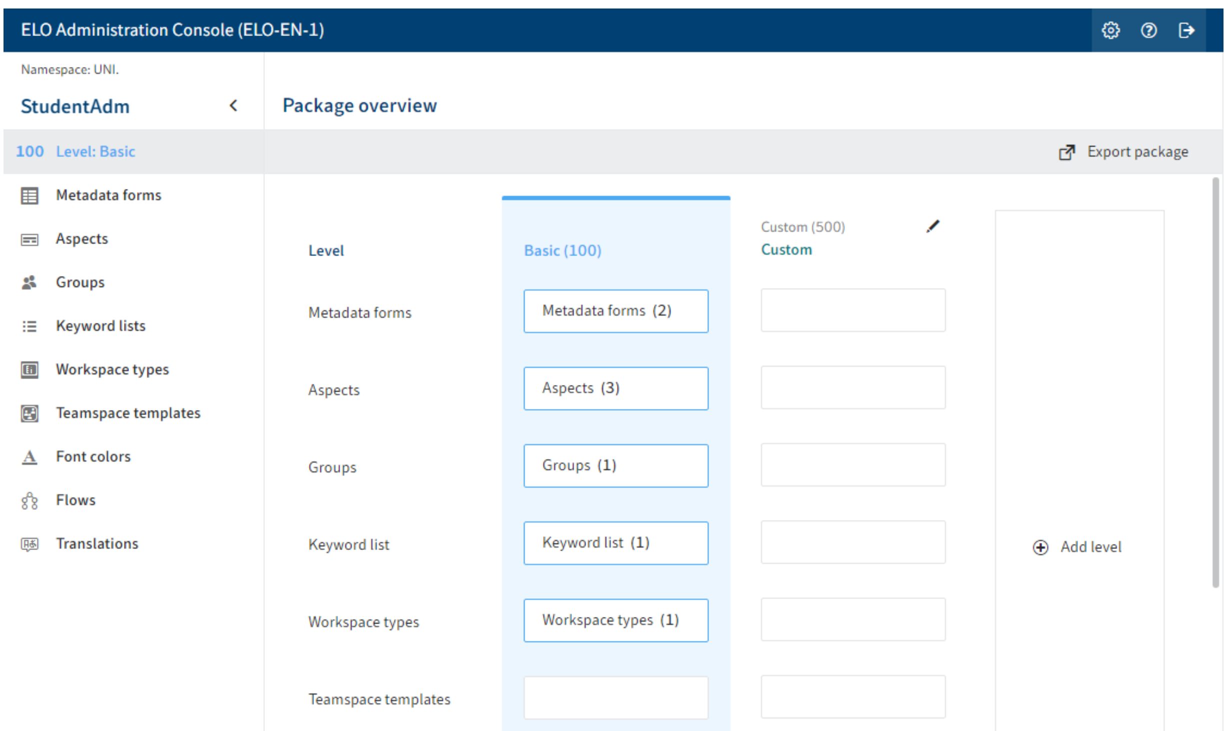
Table of contents

Workspaces

Create workspace type



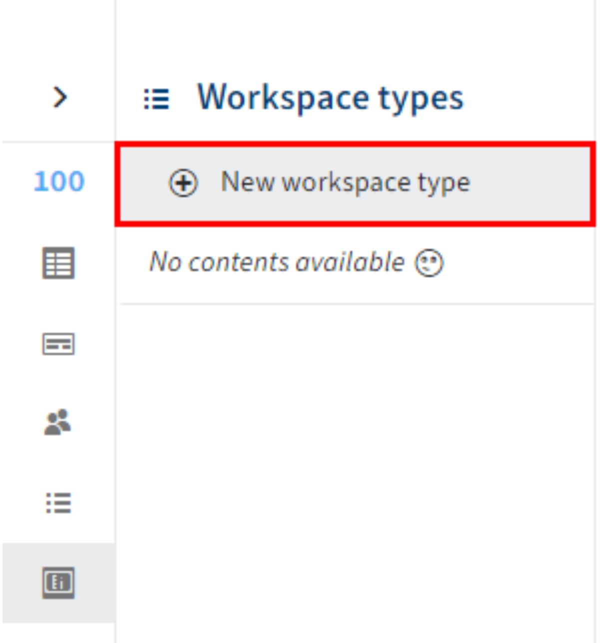
1. In the menu area of the ELO Administration Console, select the package where you would like to create the workspace type.



The package opens.

2. Select *Workspace types*.

   The *Workspace types* dialog box appears.



3. Select *New workspace type*.

   The Configuration area for the new workspace type opens.

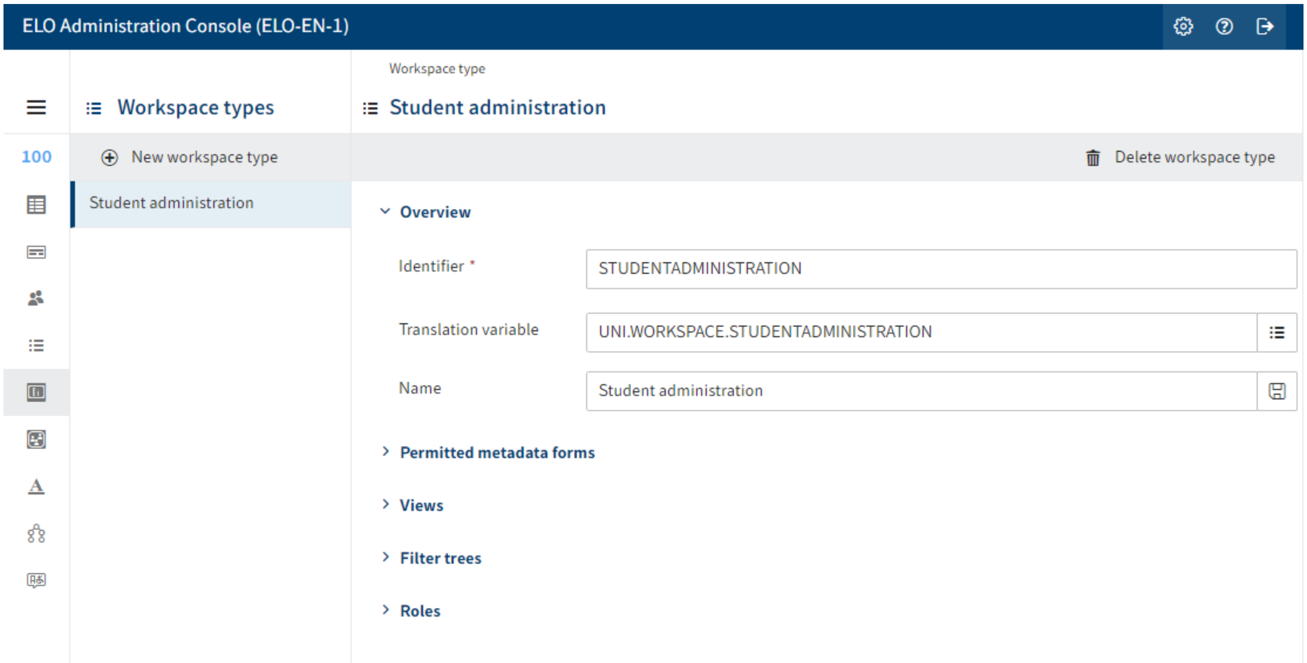
   > **Information**
   >
   > If you select an existing workspace type, you can also configure it in the *Workspace type* dialog box.

   Once you are finished with configuration, select *Save workspace type* to save it.

   A new workspace type is created.

Configure workspace type

Once you have created a workspace type, you can configure it.



The *Workspace type* dialog box offers the following actions:

- Enter basic data for the workspace type
- Define permitted metadata forms
- Create views
- Add filter trees
- Define roles
- Delete workspace type

> **Please note**
>
> You can only delete a workspace type if it is not being used.

Please note

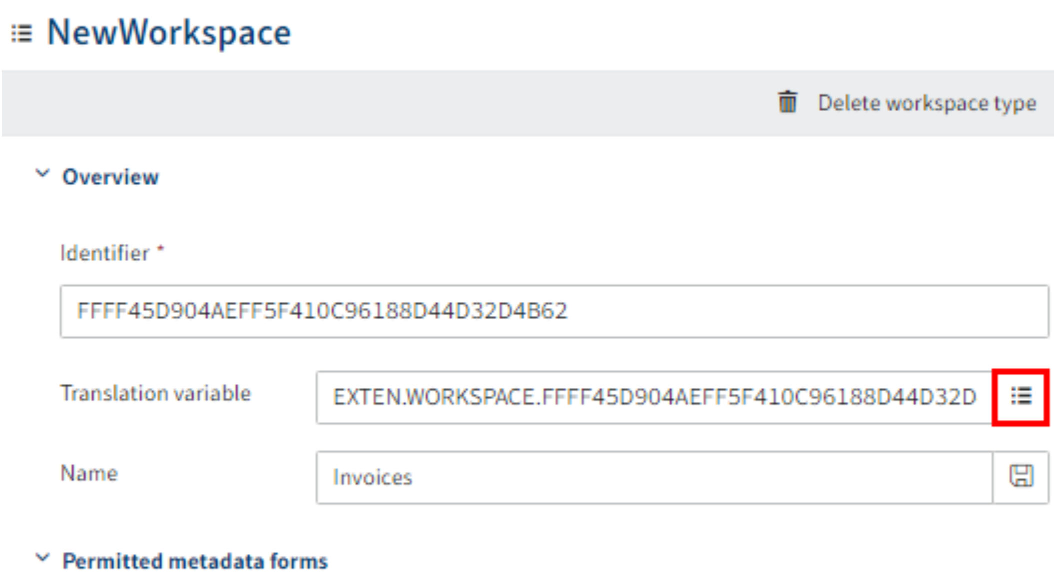
If you make changes to the workspace type after workspace instances have been created, these changes are applied to all existing workspace instances of this workspace type, unless you've already made changes in the workspace instance in the corresponding area.

Roles added to the workspace type later on are not applied to existing workspace instances.

Enter basic data for the workspace type

Basic data about the workspace type is entered in the *Overview* area.

1. Enter a technical name in the *Identifier* field.
2. Enter a translation variable into the *Translation variable* field.
3. Enter the display text of the translation variable into the *Name* field.
4. Select *Save* (floppy disk icon).



Alternative: Select an existing translation variable with the *List* button (list icon).

The content of the *Name* field will be saved as the display text of the translation variable. Here, the currently selected display language applies.

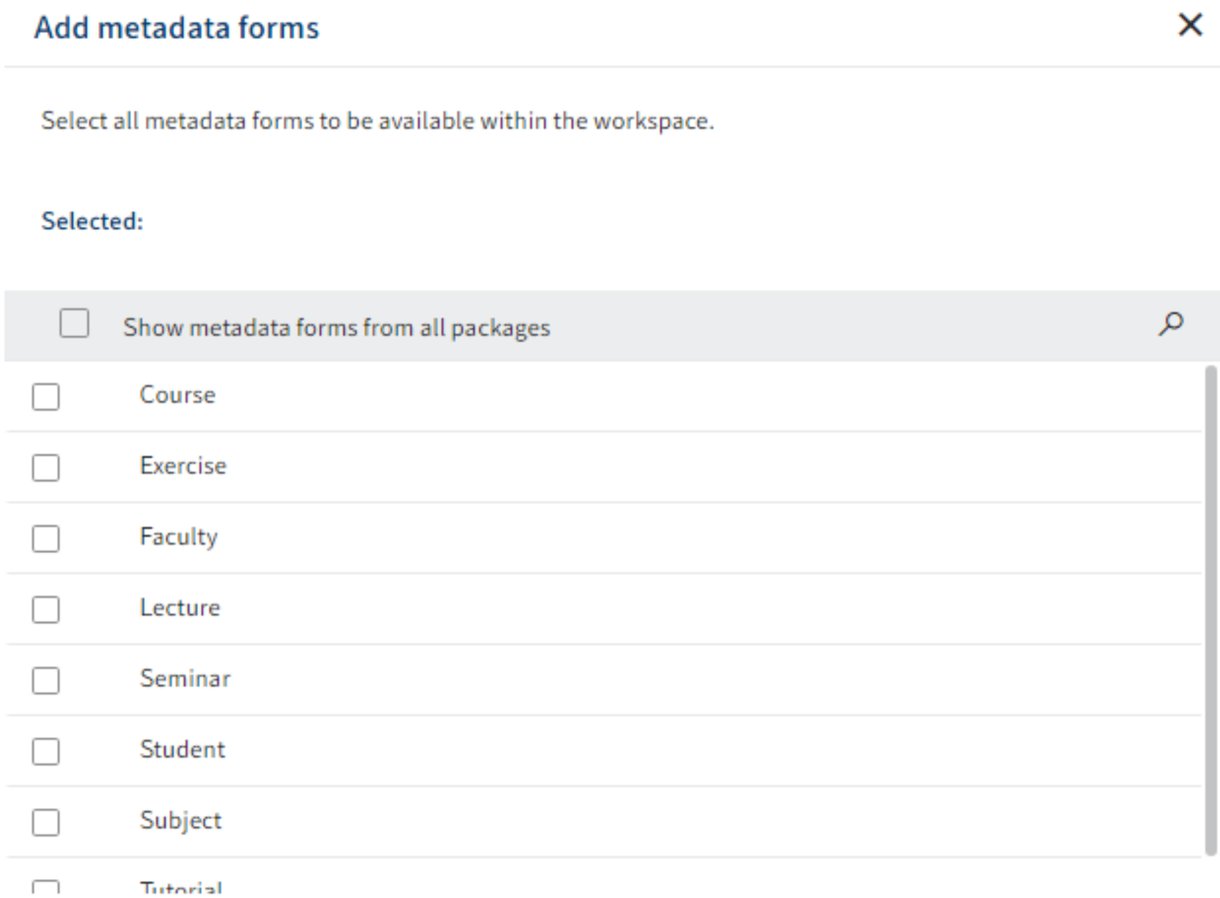
5. Select *Save workspace type*.

The workspace type is saved.

Define permitted metadata forms

In the *Permitted metadata forms* area, you define which forms can be used in the workspace.

1. Select *Add metadata forms*.



The *Add metadata forms* dialog box appears.

2. Select the metadata forms to make available in the workspace.
3. Select *Apply*.

The metadata forms will be added to the workspace type.

Option 1: Disable the option *Entries may be created manually* if users should not be allowed to make entries in the metadata form here.

This makes sense if the metadata form is used as an inheriting metadata form that acts as a kind of parent category but is not intended for new objects. It can, however, be used for lists and dashboards.

Option 2: Open the *Advanced settings* area and make an entry in the *Translation variable* and *Name* fields. The value in the *Name* field is displayed as a header for lists. It should be the plural form of the document type. For the *Invoice* metadata form, enter *Invoices*, for example.

4. Select *Save workspace type*.

   The workspace type is saved.

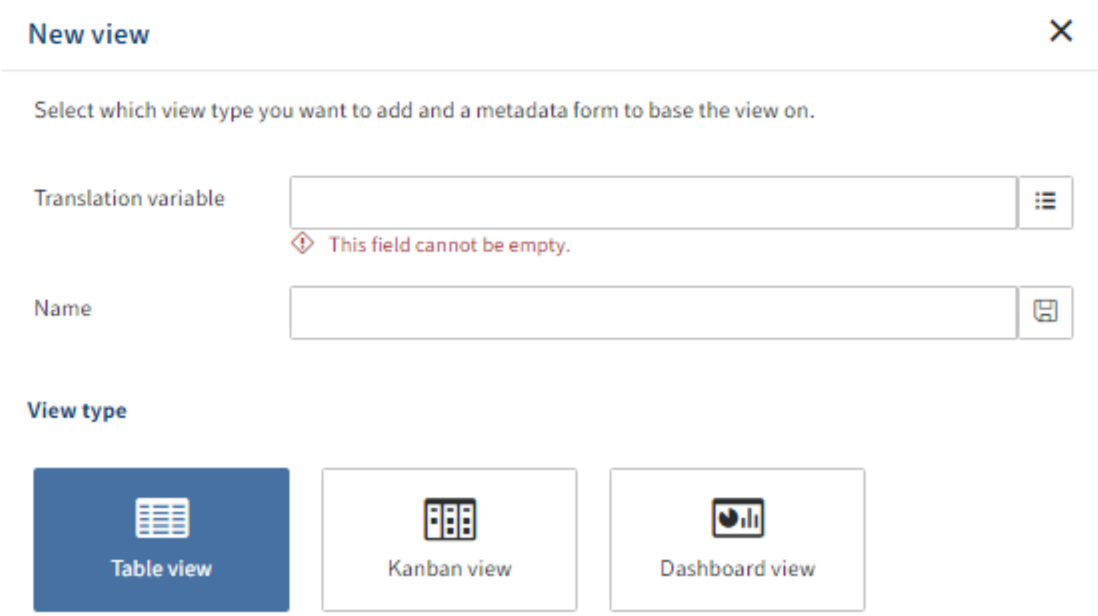
Create views

In the *Views* area, create different views for the workspace type.

> **Information**
>
> At least one metadata form must be set as a permitted form to be able to add views.

Create view

1. Select *New view*.



   The *New view* dialog box opens.

2. Enter a translation variable into the *Translation variable* field.

   Alternative: Select an existing translation variable with the *List* button (list icon).

The translation variable is automatically transferred into the *Name* field.

3. Select a view type.

   The following choices are available:

   - Table view: The workspace type data is displayed as a table. You can adjust the table columns in a later step.
   - Kanban view: The workspace type data is displayed as a kanban board. A kanban board is divided into multiple columns which represent the steps of a process. A workspace element can pass through the various stages of a process. The items are displayed as tiles or cards which can be dragged to different columns on the board. Only fields with a keyword list can be used in the kanban view.
   - Dashboard view: The data of a metadata form in the workspace can be displayed in a dashboard. Dashboards serve to display various static values in charts. At least one dashboard must be set up for the metadata form. For information on how to configure dashboards for a metadata form, refer to Metadata > Metadata forms > Create dashboards.

4. Select which metadata form to use for the view.

   Optional: For a dashboard view, you must select a dashboard set up in the metadata form.

5. Select *Apply*.

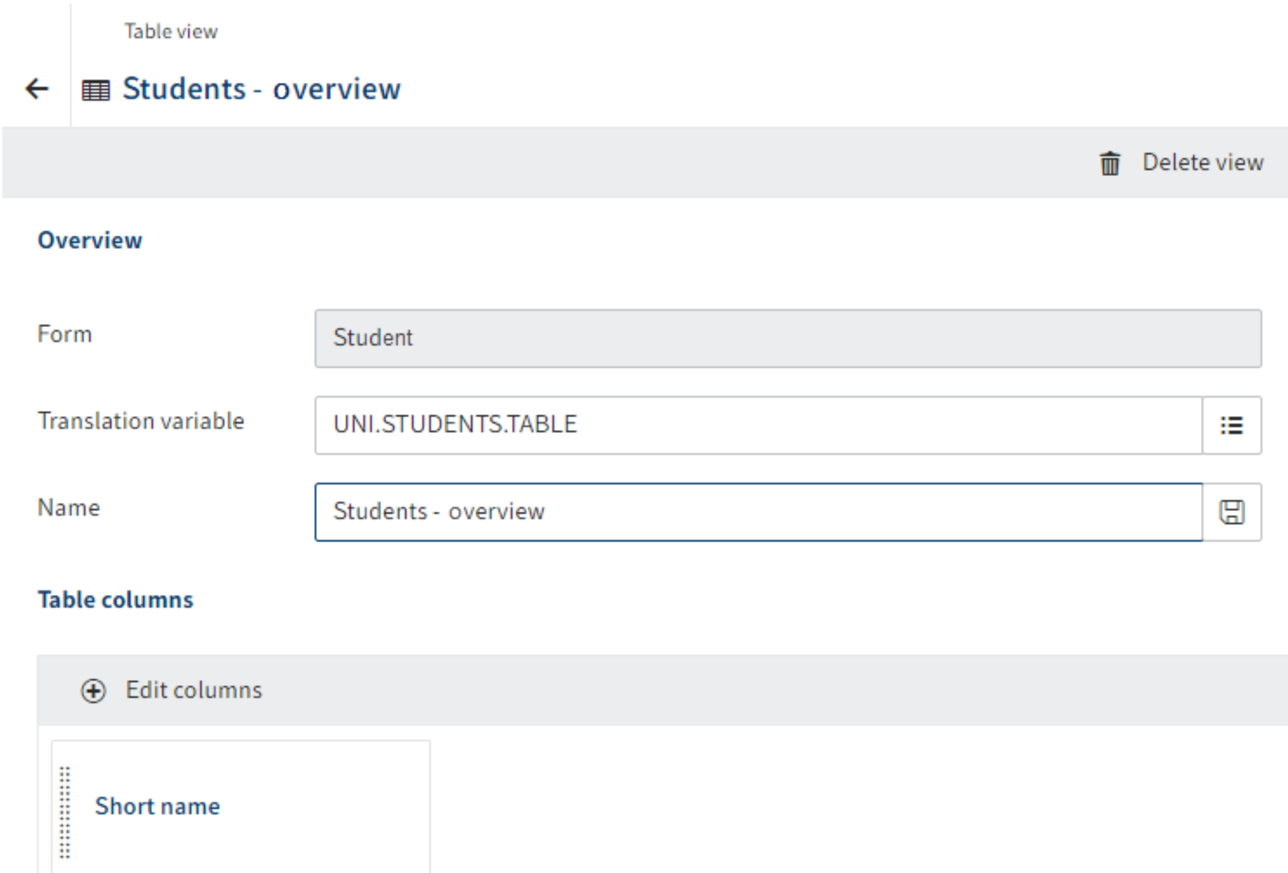
   Depending on the option selected, an associated dialog box may open. Refer to the following sections for more information on the different dialog boxes:

   - 'Table view' dialog box
   - 'Kanban view' dialog box
   - 'Dashboard view' dialog box

6. As soon as you've configured the view, select *Save workspace type*.

   The workspace type is saved.

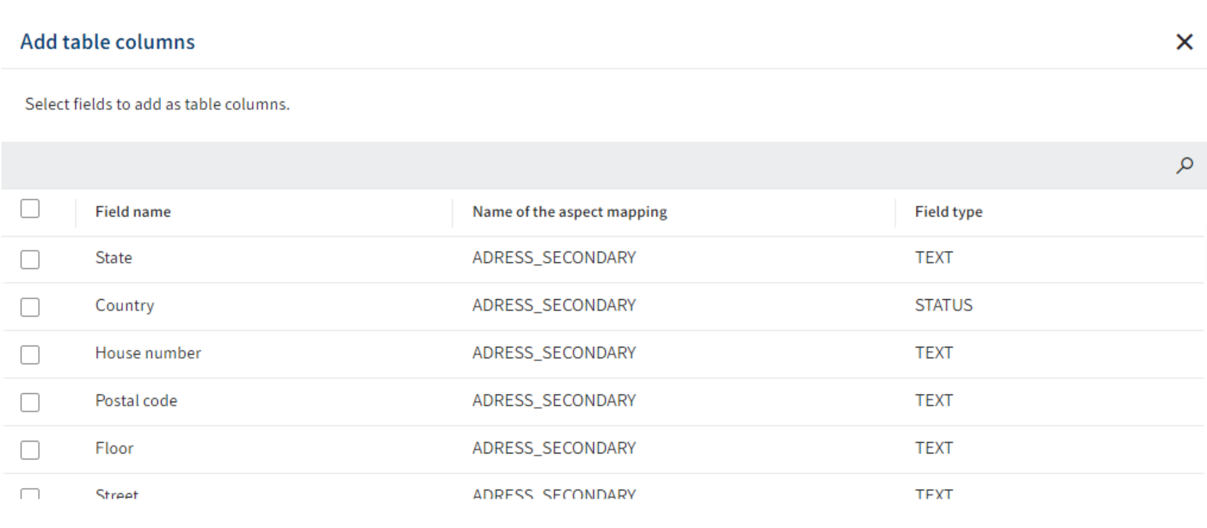
'Table view' dialog box



In the *Table view* dialog box, you can edit the selected/created table view.

Only the *Short name* column is selected by default.

1. Click the *Edit columns* button.



The *Add table columns* dialog box appears.

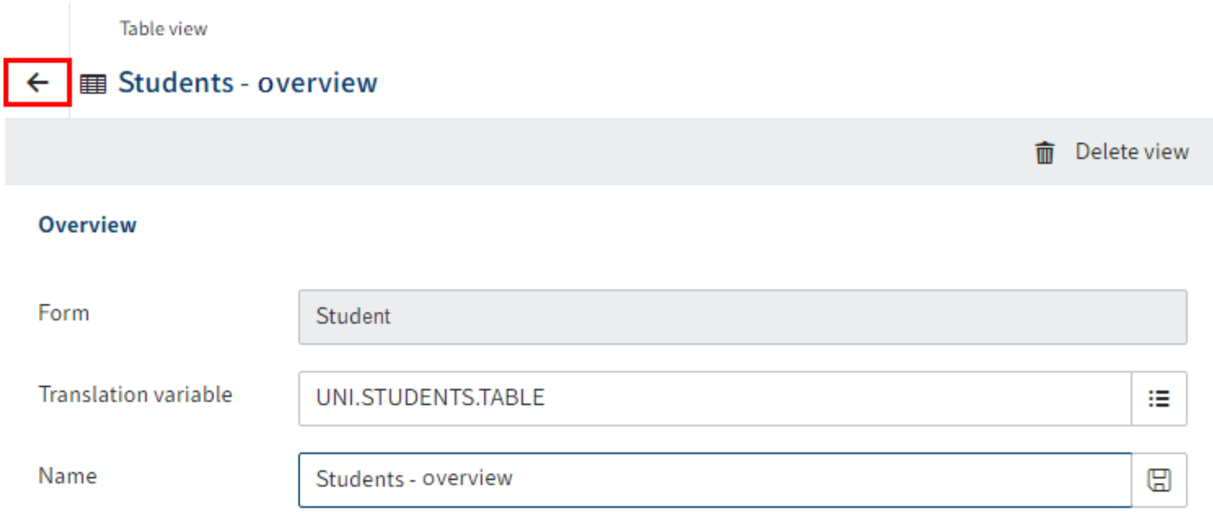
2.

Select the fields to display as columns.

3. Select *Apply*.

   The columns are added to the view.

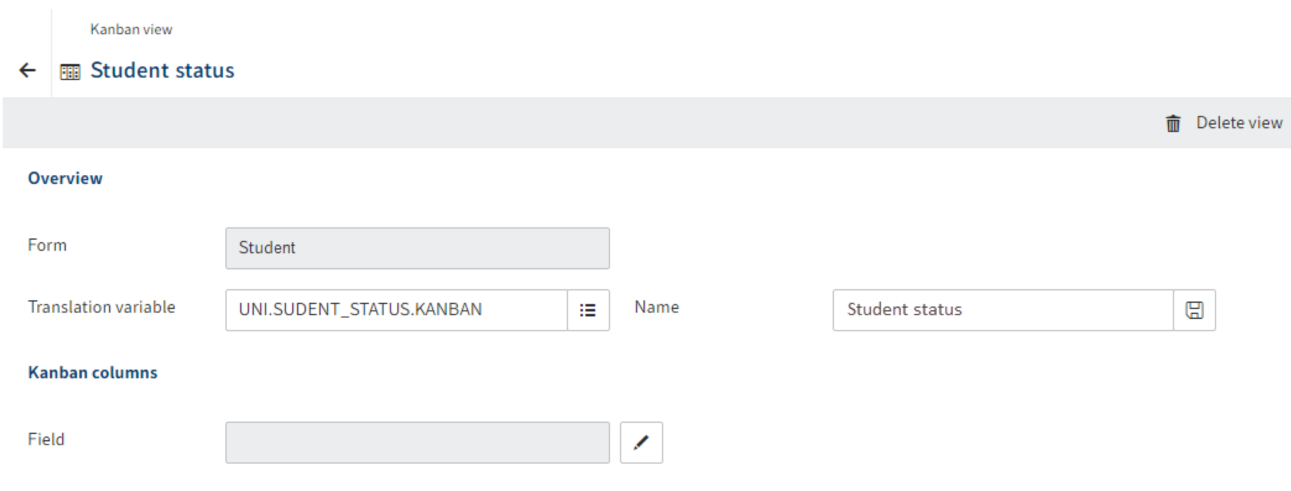
   Optional: Move the table columns via drag-and-drop.



4. To close the *Table view* dialog box, select the arrow icon.

   The view is saved.

'Kanban view' dialog box

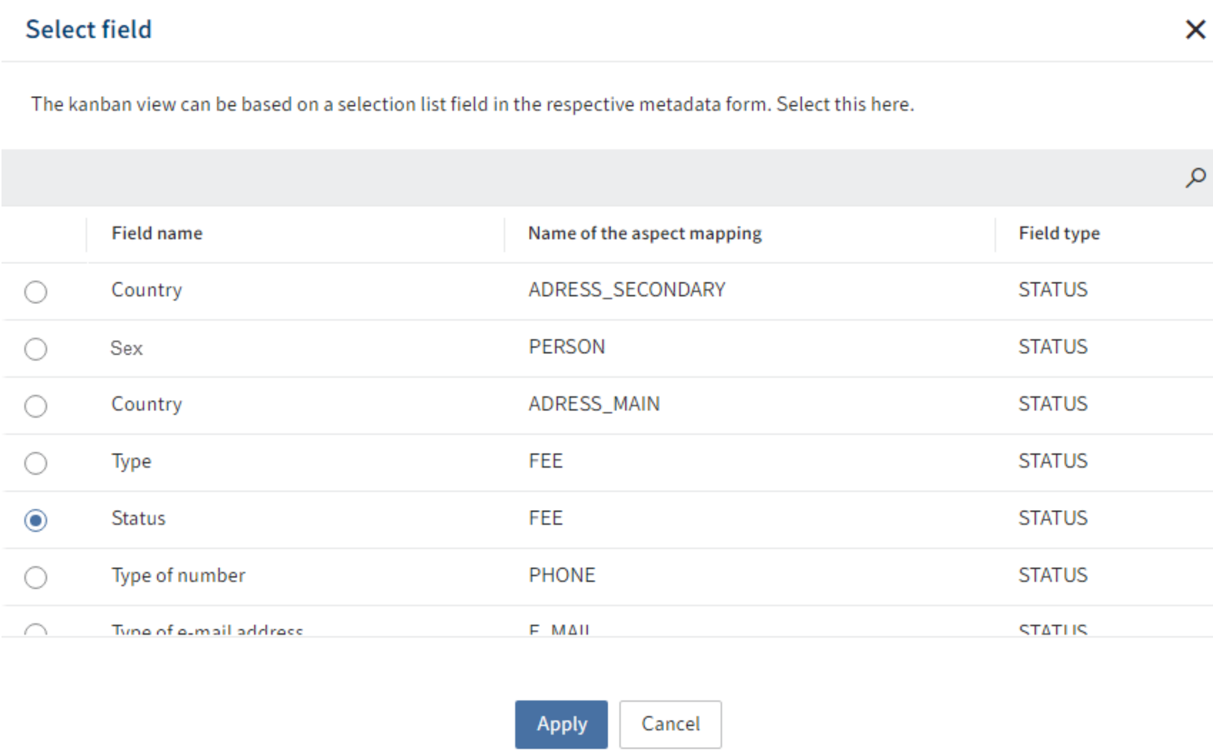


In the *Kanban view* dialog box, you can edit the selected/created kanban view.

> **Please note**
>
> Only fields with a keyword list can be used in the kanban view.

Create keyword lists via the *Keyword lists* menu item in the package.

1. Select the pencil icon beside the *Field* field.



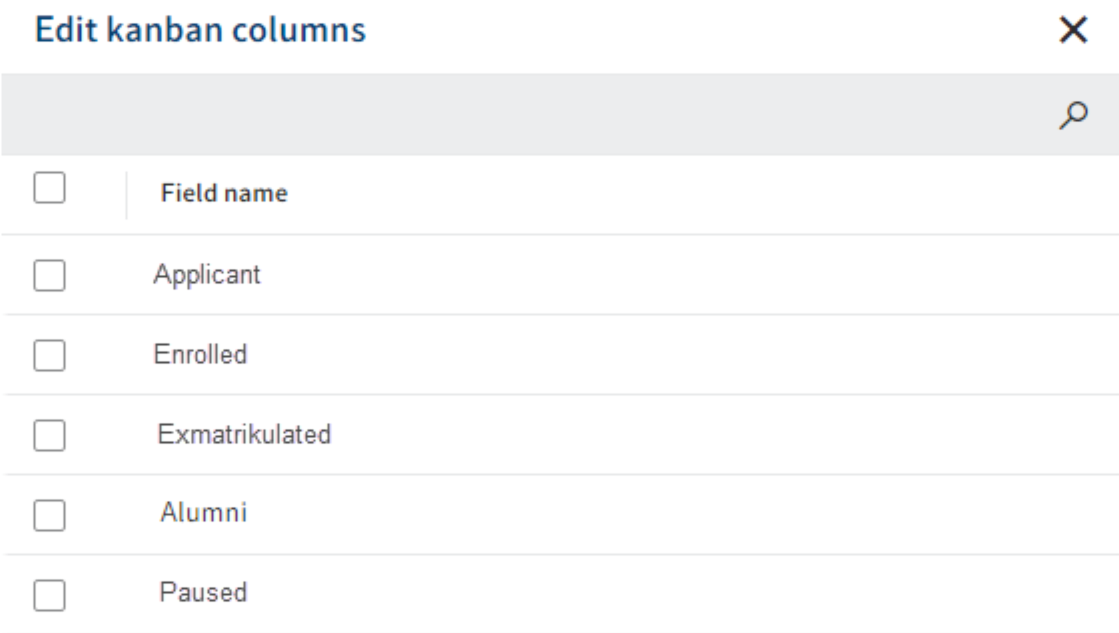
The *Select field* dialog box appears. The dialog box shows all fields with a keyword list.

2. Select a field.

3. Select *Apply*.

The *Select field* dialog box closes. The selected field is entered into the *Field* field.

4. Select the *Edit kanban columns* button.



The *Edit kanban columns* dialog box opens.

5. Select which list items to display as columns in the kanban view.

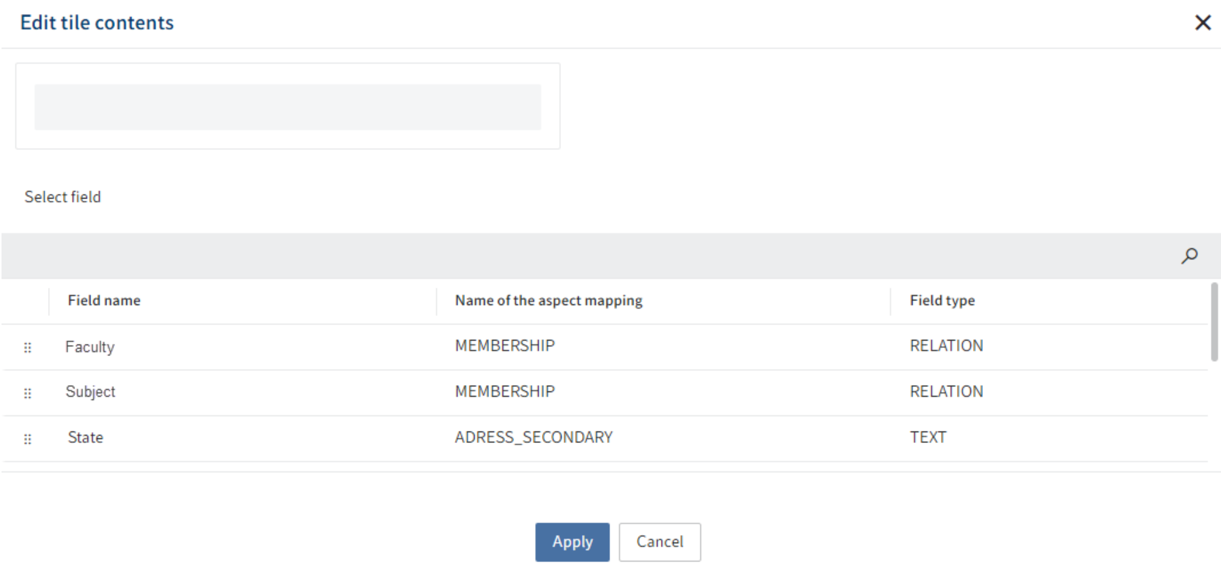
   Alternative: To select all items in the list, enable the check box next to the *Field name* column.

6. Select *Apply*.

   The *Edit kanban columns* dialog box closes. The selected columns are added to the view.

   Optional: Move the kanban columns via drag-and-drop.

7. Select *Edit tile contents*.



The *Edit tile contents* dialog box appears. You see the values of the keyword list for the selected field.

8. Drag the required fields to the blank line in the upper part of the dialog box.

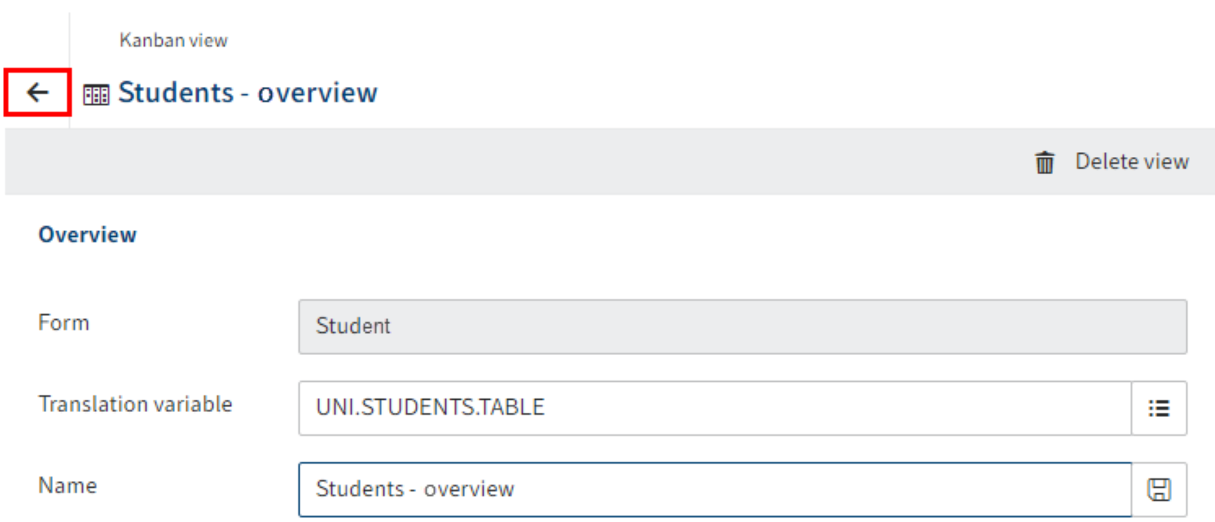
   The fields selected here will be displayed as information on the tiles.

   Option 1: To search or filter the list, use the search function (magnifying glass icon).

   Option 2: Repeat step 8 for additional fields.

9. Select *Apply*.

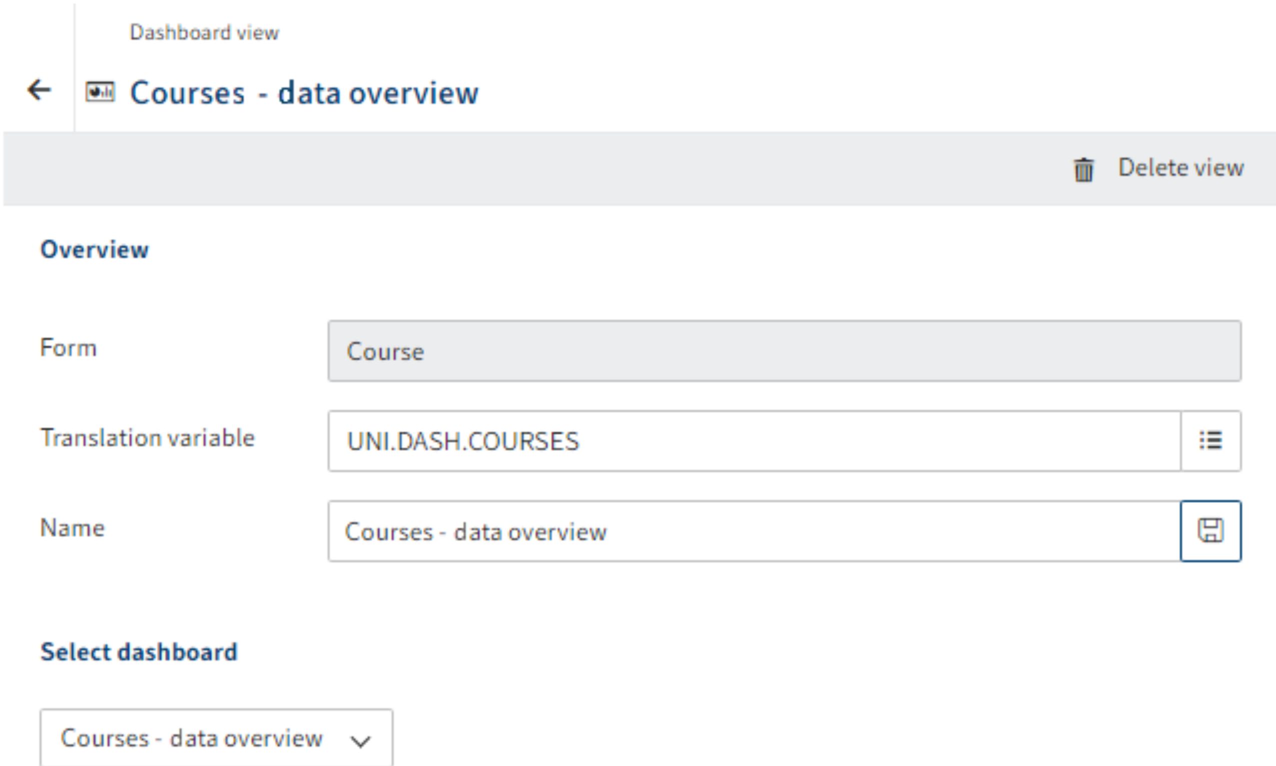
   The *Edit tile contents* dialog box closes. The selected fields are entered as tile contents.



10. To close the *Kanban view* dialog box, select the arrow icon.

    The view is saved.

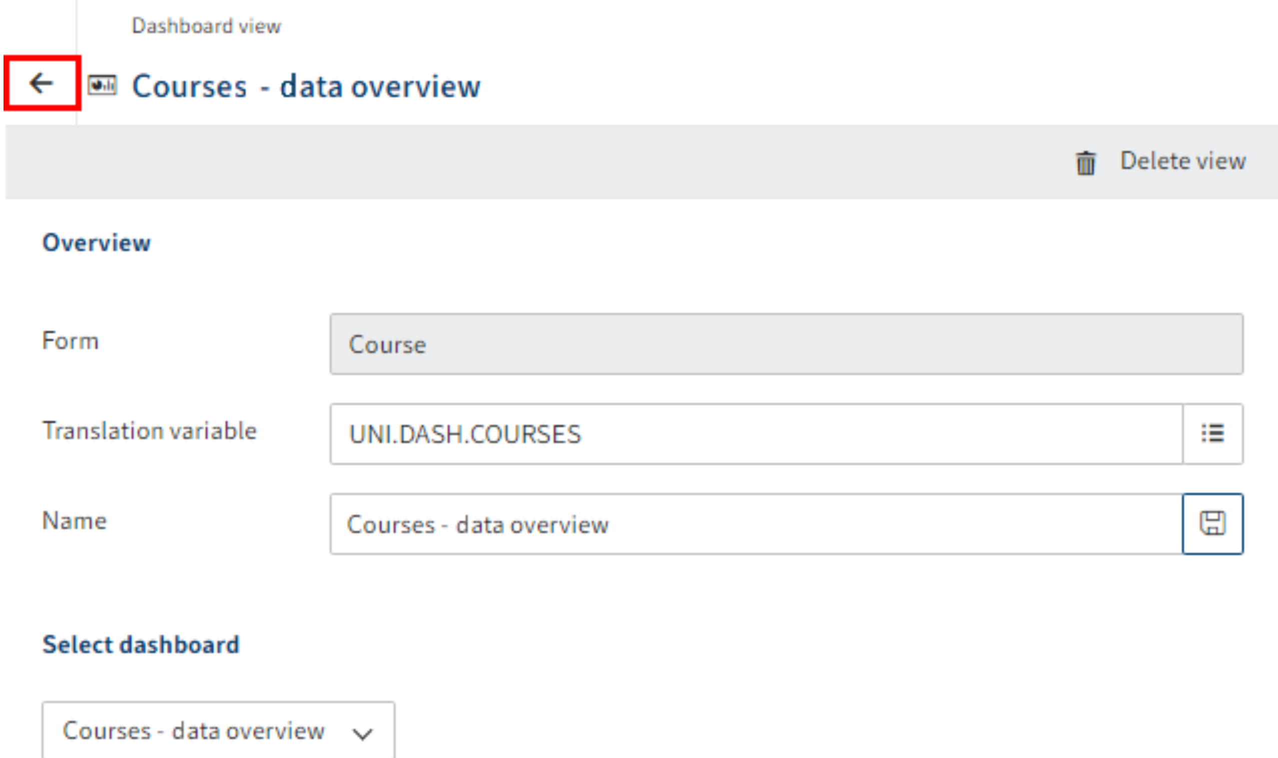
'Dashboard view' dialog box



In the *Dashboard view* dialog box, you can edit the selected/created dashboard view.

Optional: In the *Select dashboard* field, you can change the dashboard to be displayed, if necessary.

> **Information**
>
> For information on how to configure dashboards for a metadata form, refer to Metadata > Metadata forms > Create dashboards.



1. To close the *Dashboard view* dialog box, select the arrow icon.

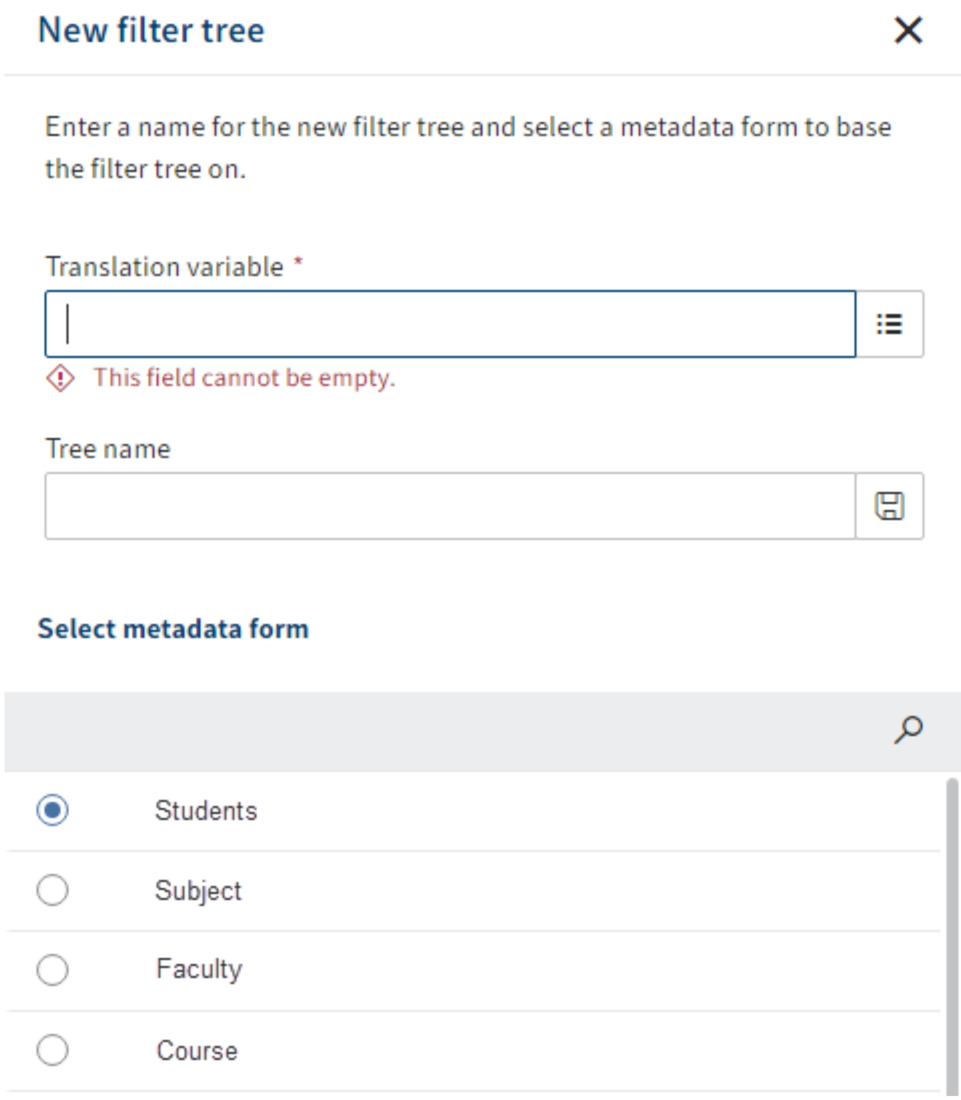
   The view is saved.

Filter trees

Filter trees are used to filter the view of items in the workspace. Different filters can be combined in filter trees.

Add filter tree

1. Select *New filter tree*.



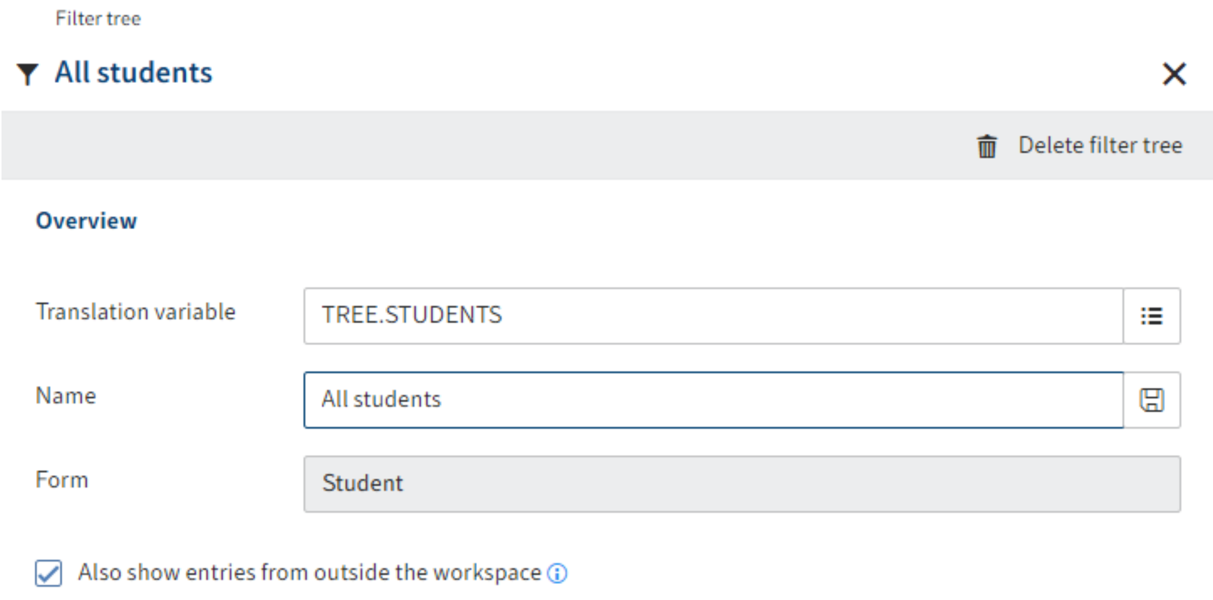
The *New filter tree* dialog box appears.

2. Enter a translation variable into the *Translation variable* field.
3. Enter the display text of the translation variable into the *Tree name* field.
4. Select *Save* (floppy disk icon).

   Alternative: Select an existing translation variable with the *List* button (list icon).

5. Select a metadata form.
6. Select *Apply*.

   The *New filter tree* dialog box closes.



The *Filter tree* dialog box appears.

Optional: Check the *Also show entries from outside the workspace* option as well.

> **Please note**
>
> If this option is enabled, the contents of this filter tree are applied to all workspaces created with the same workspace type.

7. Select *Save workspace type*.

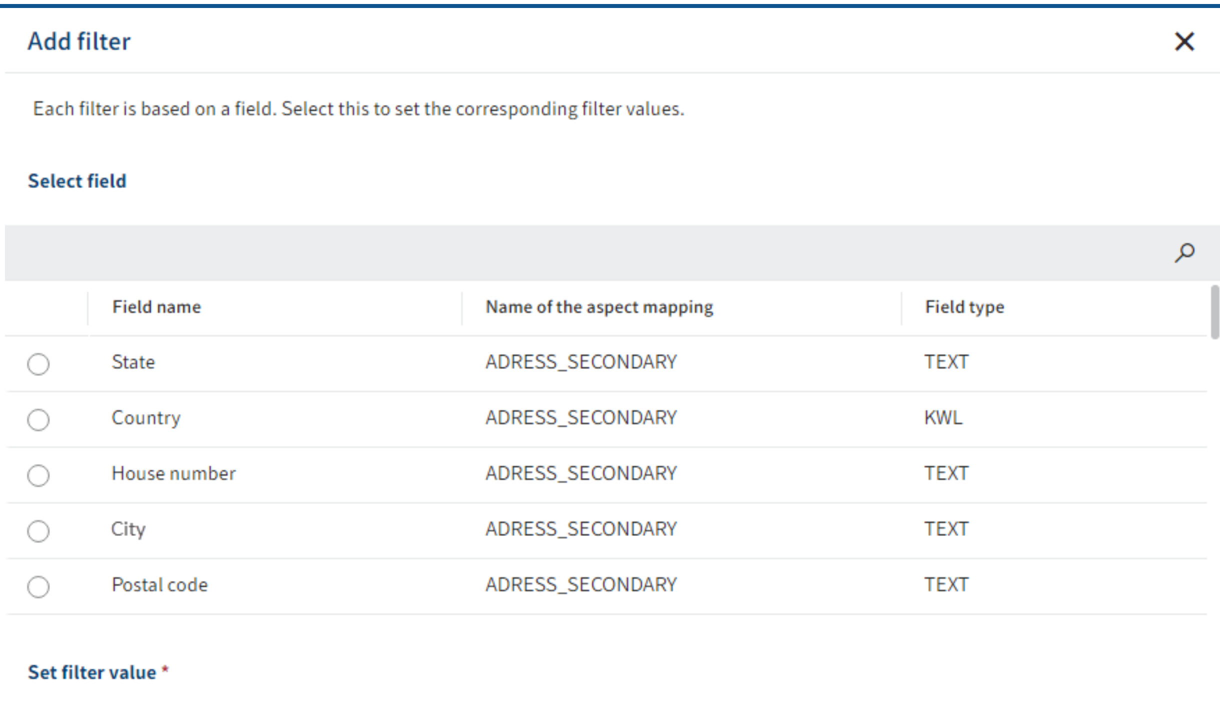
   The workspace type is saved.

Base filter

Base filters help refine the filtering of the view in the filter tree. They can be combined with other filters.

1. Open a filter tree.

2. In the *Base filter* area, select *Add filter*.



The *Add filter* dialog box appears.

3. Select a field.

4. Enter a filter value under *Set filter value*. You can select or enter different values depending on the field.

> **Information**
>
> For some field types, you can add conditions via *Add condition*. Conditions are added with an OR link.

5. Select *Apply*.

   The filter is entered under *Base filter*.

6. Select *Save workspace type*.

   The workspace type is saved.

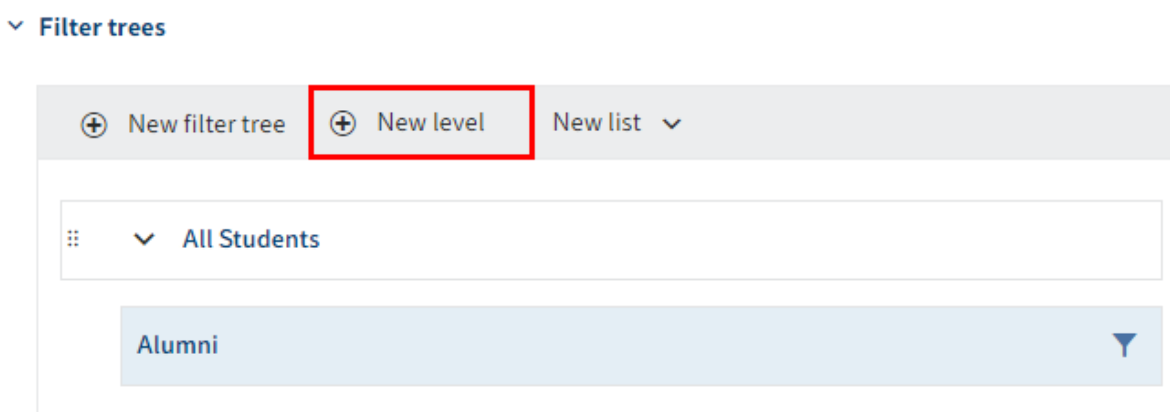
   As soon as you select an existing filter tree, the *New level* and *New list* functions become available. Refer to the following sections for more information on these functions:

   - New level
   - New list

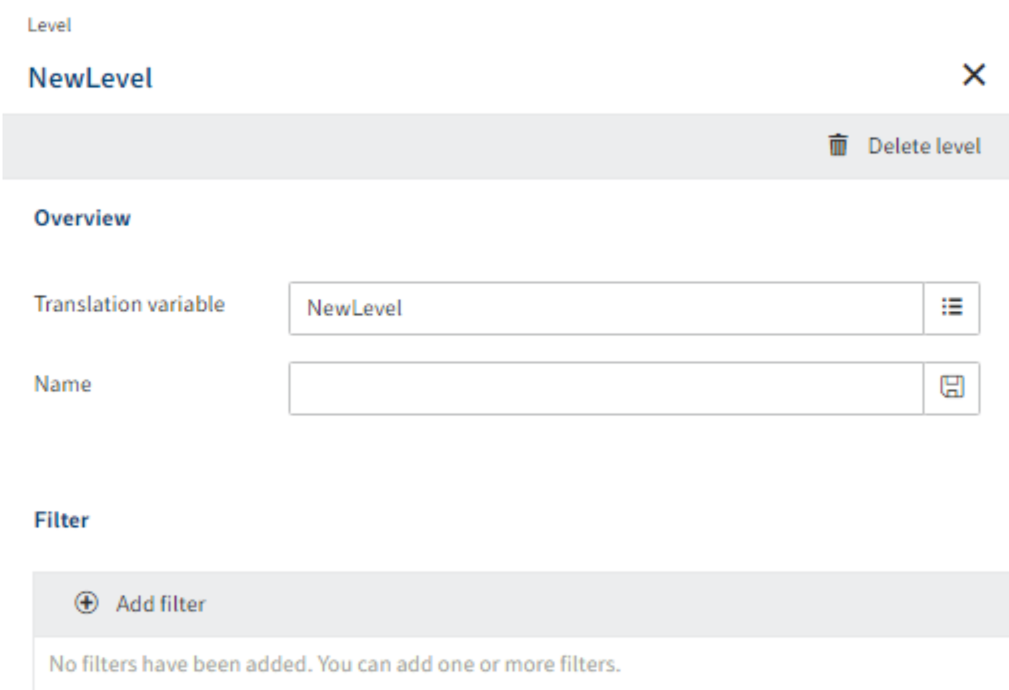
New level

You can refine a filter in the filter levels. This allows items to be displayed with different filter combinations as needed.

1. Select a filter tree.



2. Select the *New level* button to create a level.

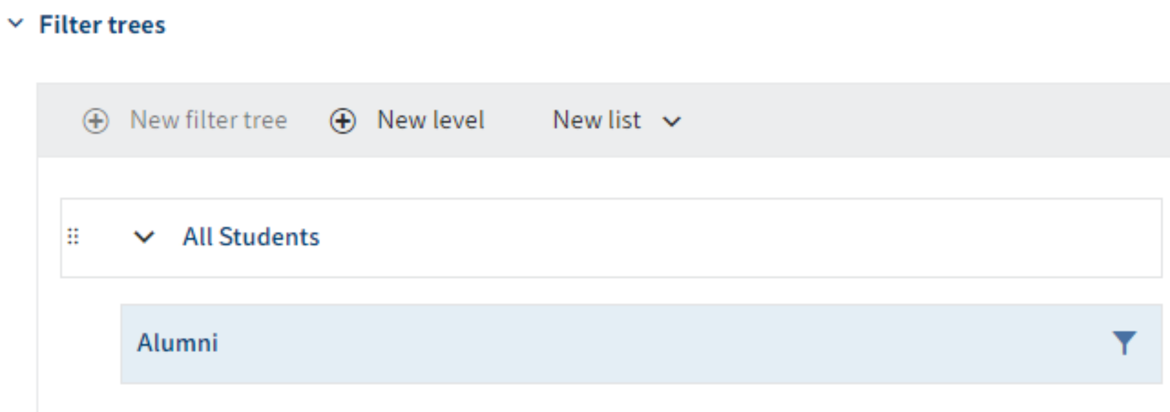


The *Level* dialog box appears.

3. Enter a translation variable into the *Translation variable* field.
4. Enter the display text of the translation variable into the *Name* field.
5. Select *Save* (floppy disk icon).

Alternative: Select an existing translation variable with the *List* button (list icon).

6. Select *Save workspace type*.



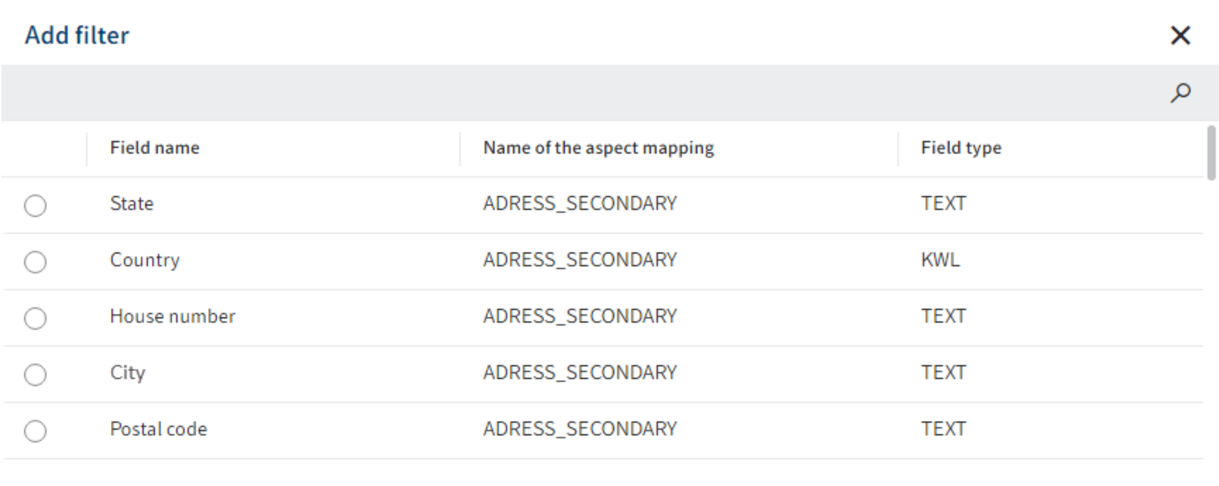
The level is entered under the selected filter tree and the workspace type is saved.

> **Information**
>
> You can add [filters]() and [lists]() to a level.

Add filter

Add a filter to a level as follows:

1. Select *Add filter*.



The *Add filter* dialog box appears.

2. Select a field.

3. Enter a filter value under *Set filter value*. You can enter or select different values depending on the field.

Optional: Select *Add condition* to add more conditions to the filter. More conditions can be added with an OR link.

4. Select *Apply*.

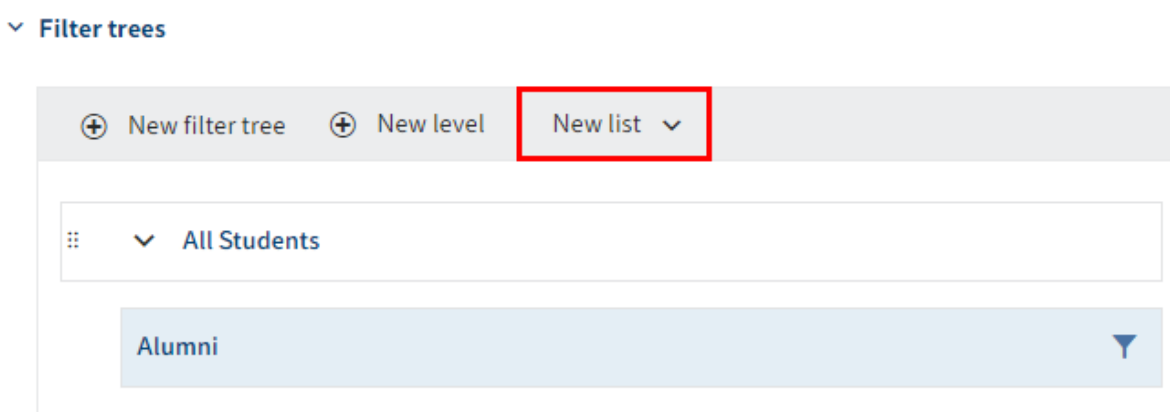
   The filter is entered in the level.

New list

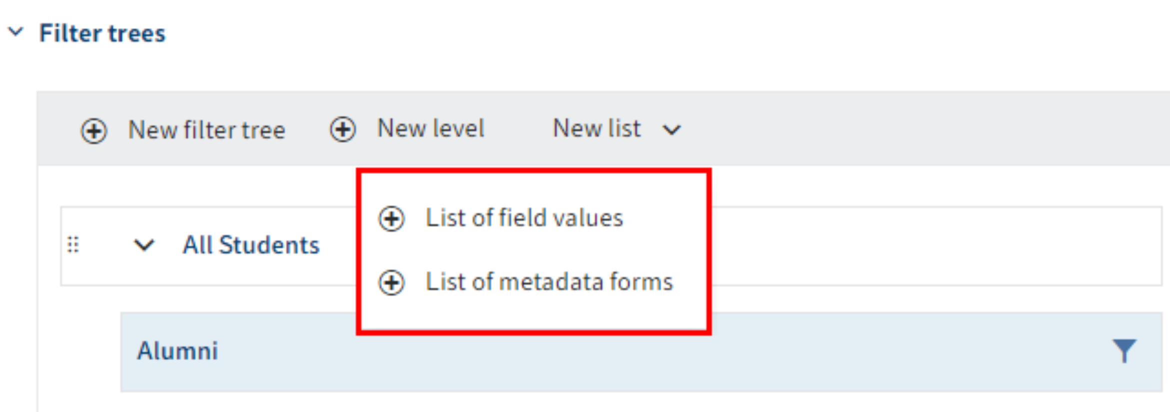
Lists are another option to filter data in the workspace. With lists, you can create filters based on the values of a field or metadata forms with inheritance. In the workspace, the matching entries are shown under a corresponding level.

1. Select a filter tree.

   Optional: Select a level if required.



2. Select *New list*.



   The *New list* drop-down menu opens.

3. Select a type:

   - List of field values: A list based on the values of a field. This can be values you have entered or values from a keyword list.
   -

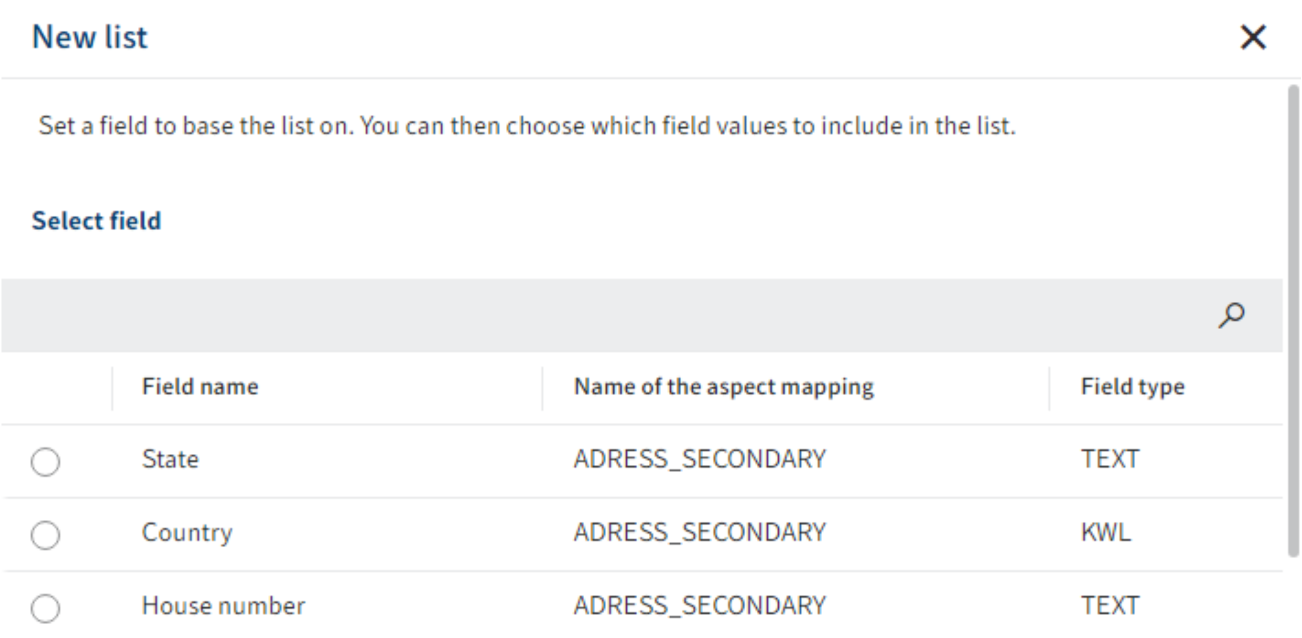
List of metadata forms: A list based on a metadata form and metadata forms that inherit their settings from this metadata form (child metadata forms).

Additional settings are required depending on the type. Configuration of the different types is explained in more detail in the following sections.

4. Configure the list depending on the selected type.
5. Select *Save workspace type*.

   The list and workspace type are saved.

Configure list of field values



If you have selected the type *List of field values* from the *New list* drop-down menu, the *New list* dialog box opens.

You have to select a field that the list should be based on.

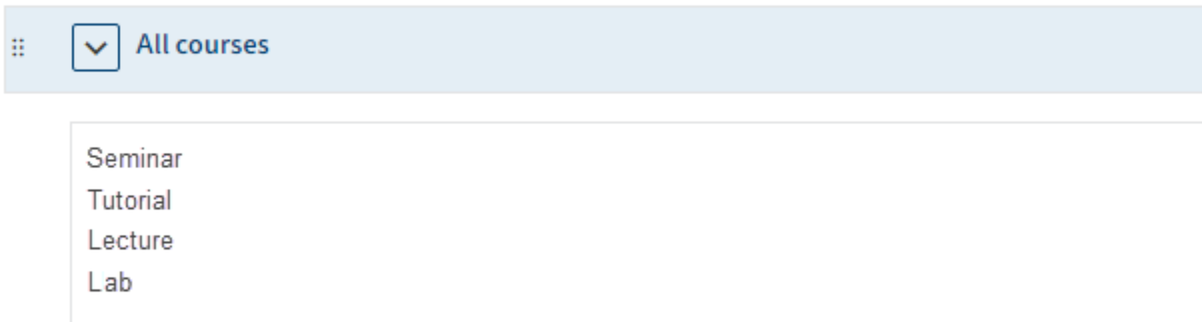
The following options are available:

- Field without keyword list: The field values previously entered form the list.
- Field with keyword list: You can choose whether the list should contain all or just individual values of the keyword list.

  If the option *Apply all keywords to the list* is enabled, newly created keyword lists are also applied to existing workspace instances. The new keywords only appear in the list once they've been used in an object.

List of metadata forms

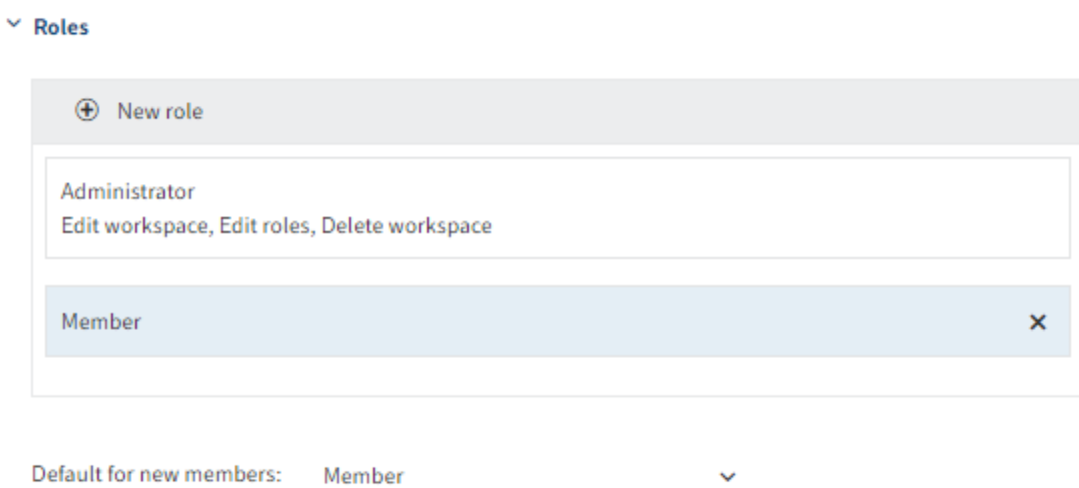
To be able to create a list based on metadata forms, you will need a metadata form that inherits its settings to other metadata forms. These metadata forms are also referred to as child metadata forms.



If a metadata form with child metadata forms is selected, ELO automatically recognizes the child metadata forms and applies them as a value in the list.

Define roles

Different roles can be assigned for workspaces. Roles allow you to control rights for the workspace and permissions to contents in the workspace.



In the *Roles* area, you can see which roles have been set up for the workspace and which settings apply for the respective roles.

> **Information**
>
> When creating a workspace int he client, these roles are created as groups in ELO.

The following roles are created with default settings:

-

Administrator: The creator of a workspace is automatically assigned the role of *Administrator*. Other members can also be assigned the role of *Administrator*. Administrators have all the rights to the workspace and all permissions to the contents in the workspace.
- Member: Users with this role have the permissions to view, edit, and delete contents in the workspace.

> **Information**
>
> The *Administrator* role cannot be edited or deleted.

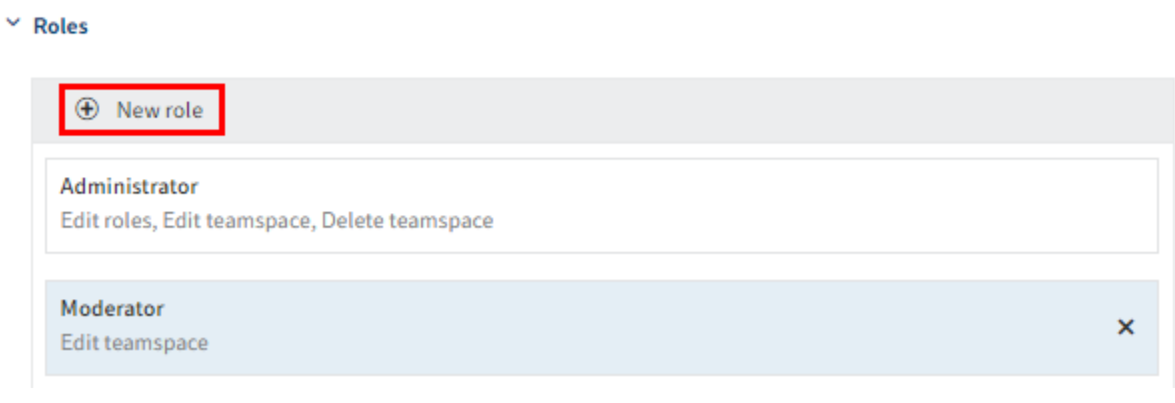
You can also set authorization options for entries that were created in a workspace. For more information, refer to the ELO Java Client documentation.

Overview of functions

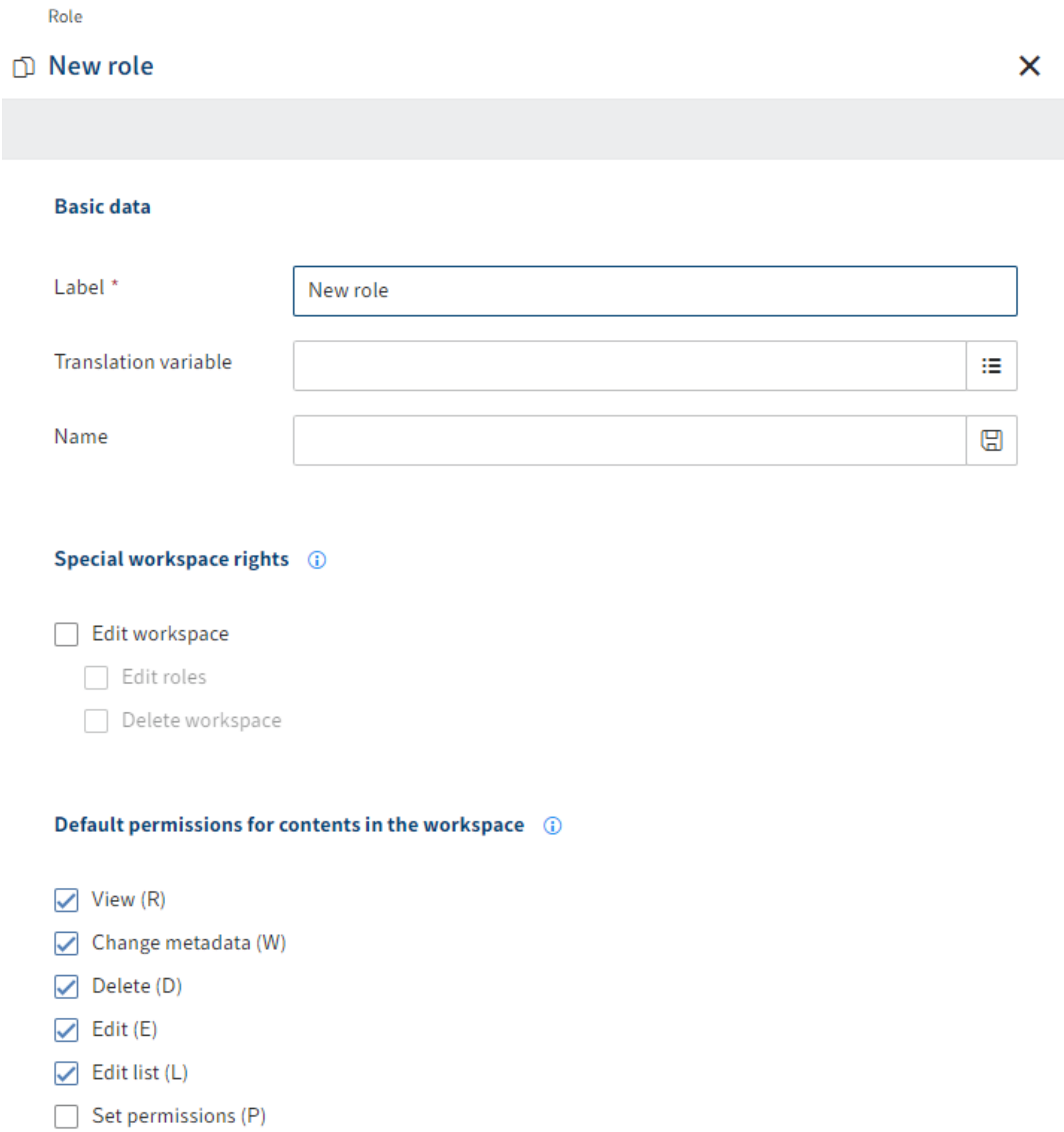
- New role: Add a new role to the workspace. See the following section for additional information on this.
- Roles: Selecting one of the existing roles lets you see the role's settings and edit them if you have the rights and permissions (main administrator).
- Default for new members: Select which role is set as standard for new members.

New role

> **Information**
>
> Only the main administrator can create and edit roles.



1. Select *New role*.



The *Role* dialog box opens.

2. Enter a technical name in the *Identifier* field.
3. Enter a translation variable into the *Translation variable* field.
4. Enter the display text of the translation variable into the *Name* field.
5. Select *Save* (floppy disk icon).

   Alternative: Select an existing translation variable with the *List* button (list icon).
6. Select which rights and permissions a user with this role should receive.

You can assign the following special workspace rights:

- Edit workspace: Users with this right can use the *Edit workspace* function to make changes to a workspace. They can also change the roles assigned to members in the workspace and add new members.
- Edit roles: Users with this right can edit the roles in the workspace.
- Delete workspace: Users with this right can use the *Edit workspace* function to delete a workspace.

You can grant the following default permissions for contents in a workspace:

- View (R): Users have read access to the entry. They cannot modify the entry.
- Change metadata (W): Users can edit the metadata of the entry.
- Delete (D): Users can delete the entry.
- Edit (E) (documents only): Users can edit the selected entry. This means that they can change the working version and upload a new version.
- Edit list (L) (folders only): Users can change the contents of the folder. For example, you can create documents in this folder or move or remove documents from the folder.
- Set permissions (P): Users can change the permissions for the selected folder.

> The current workspace rights and permissions only take effect if the user has the corresponding user rights.

7. Select *Save workspace type*.

The workspace type is saved. The new role can now be used for new workspaces. Existing workspaces with this workspace type do not take on the role.