



# **Configuration and administration**

ELO Administration Console



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# ELO Administration Console

## Introduction

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### Please note

We have made every effort to supply product documentation that is as accurate as possible. However, as we are continuously developing the ELO Administration Console, the status of the program changes very quickly. For this reason, there may be minor discrepancies between the descriptions and images in the manual and in the program. We ask for your understanding if this occurs.

## Basics

This chapter explains some of the basics in the ELO Administration Console.

### System requirements

You will find more information related to the system requirements in the *ELO system requirements* documentation.

#### Please note

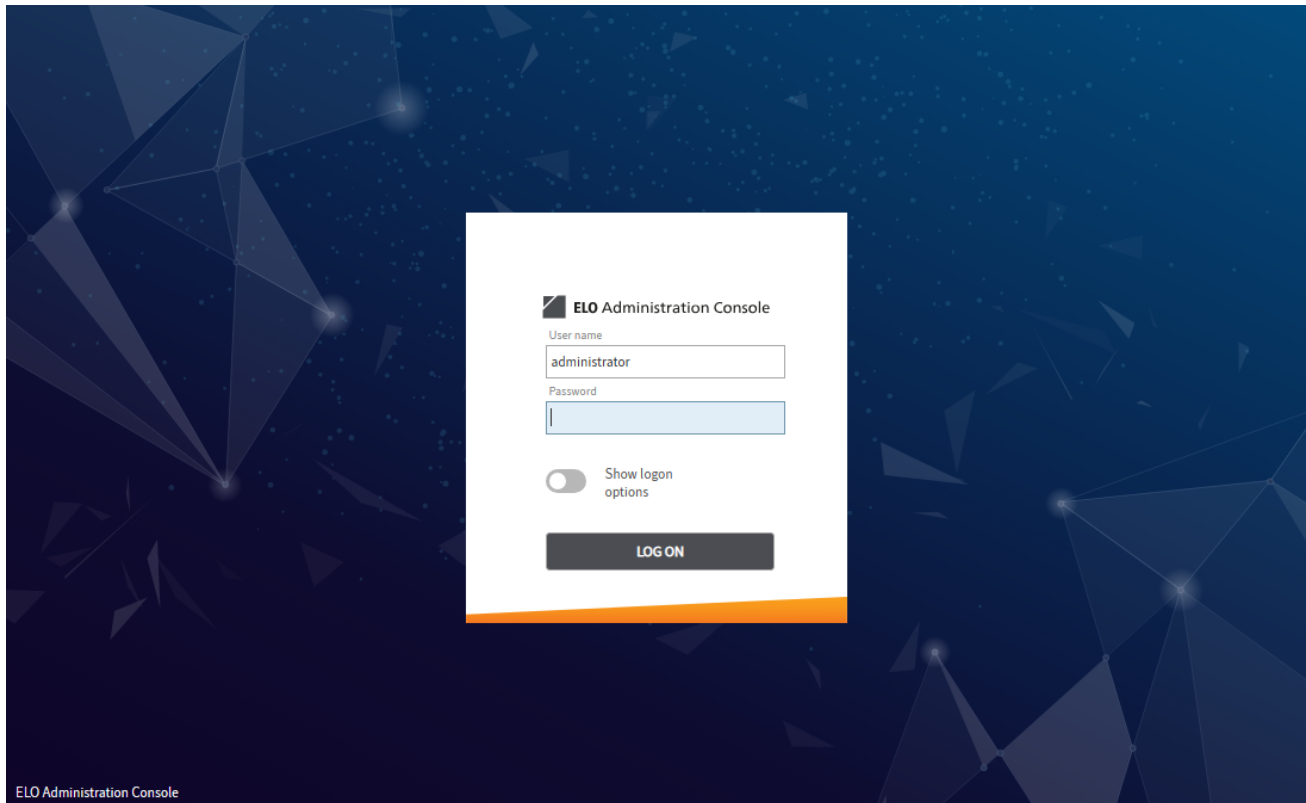
The version of the ELO Administration Console must be compatible with the corresponding ELO Indexserver. Note the information in the ELO Server Setup.

### Installation

You can install the ELO Administration Console via the ELO server setup program.

Refer to the the *ELO Server* manual for more information.

### Start and logon



To start the ELO Administration Console, enter the URL in the browser as follows:

`http://<ELO server with installed ELOac>:<Port>/AdminConsole/`

### Example

`https://elosever:9083/AdminConsole/`

#### Information

When running multiple repositories, the ELO Administration Console opens the repository that was created first by default.

You can switch to another repository by changing the URL. You must use the following format:

`https://<ELO server>:<port>/ix-<target repository>/plugin/de.elo.ix.plugin.proxy/ac/`

Example: `https://elosever:9093/ix-EXTEN/plugin/de.elo.ix.plugin.proxy/ac/`

Tip: Save the different URLs as a bookmark or link for quick access to the different URLs.

Enter your user data to open the ELO Administration Console.

User name: Enter your user name here.

Password: Enter your user password here.

#### ELO Administration Console

User name

Password



Show logon options

LOG ON

Language

English

ELO Administration Console status report ▶

Show logon options: If the *Show logon options* toggle is enabled, you will see additional logon options.

The ELO Administration Console remembers whether the logon options were enabled or disabled and loads the corresponding state the next time you start the program.

Language: Select the language of the program interface here.

ELO Administration Console status report: View the ELO Administration Console status report.

Log on: Sign in with *Log on*.

## The menu area

The home screen of the ELO Administration Console consists of the menu area.



The upper section of the menu area, the menu bar, contains the following menu items:

- ELO Administration Console <repository name>: Click this to open the settings for the system, maintenance, server modules, system information, and the clients.
- Browse: Searches the settings and options in the ELO Administration Console.
- Configuration: You can edit the configuration here.
- Information about the repository and the ELO Administration Console: This is where you can edit the settings for the current repository and the program.
- Help: Open the help page.
- Log off: Log off from the program.

The menu items *Configuration*, *Information about the repository and the ELO Administration Console*, and *Log off* are explained in more detail in the following sections of this chapter.



Below the header, you see the different areas of the ELO Administration Console, which are organized into the following groups:

- Packages
- Proxy
- Servers
- System settings
- Maintenance
- Server modules
- System information
- Other menu items

You can find more information about the different areas of the ELO Administration Console in the following chapters.

## Configuration

In the *Configuration* section, you can define basic settings as well as the layout and behavior of the ELO Administration Console.

### Change setting

1. Select the respective setting to make changes.

#### ▼ ELO Administration Console home screen options

Menu item display settings

Title and description ▼

✓
✗

Title and description

Title only

window

Behavior when menu title is clicked

Open page in the same window

Behavior when menu icon is clicked

Specify whether you want to display a description next to the menu items or just the title.

Specify whether you want the page to open in the same or in a new window when you click the menu title.

Specify whether you want the page to open in the same or in a new window when you click the menu icon.

#### ▼ ELOas configuration

GUID of ELOas Base folder

(F6C173D7-3F71-4559-91E5-4886139B12CF)

The ELOas Base folder is defined as the default. This folder is also used if the field remains empty. You can enter an alternative GUID if you want to use a different folder for your ELOas rules.

Save rules as

Text file

Save ELOas rules created with the ELO Administration Console as extra text to an empty entry or as a text file in ELO.

Temporary directory for text files

E:\ELO\EN\temp\ELO-EN-2

Enter the directory path you want to save text files in when checking out. This is only relevant if you save ELOas rules as text files.

#### > Visibility of menu items on the home screen

#### > Manage profiles

The setting switches to edit mode.

2. Open the drop-down menu.
3. Select the required setting.
4. Click *Save* (green check mark) to confirm your changes.

The new setting is applied.

## ELO Administration Console home screen options

#### ▼ ELO Administration Console home screen options

Menu item display settings

Title and description

Specify whether you want to display a description next to the menu items or just the title.

Behavior when menu title is clicked

Open page in the same window

Specify whether you want the page to open in the same or in a new window when you click the menu title.

Behavior when menu icon is clicked

Open page in the same window

Specify whether you want the page to open in the same or in a new window when you click the menu icon.

Menu item display settings: Specify whether you want to display a description next to the menu items or just the title.

Behavior when menu title is clicked: Specify whether you want the page to open in the same or in a new window when you select the menu title.

Behavior when menu icon is clicked: Specify whether you want the page to open in the same or in a new window when you select the menu icon.



## ELOas configuration

### ▼ ELOas configuration

GUID of ELOas Base folder	(F6C173D7-3F71-4559-91E5-4886139B12CF)	The ELOas Base folder is defined as the default. This folder is also used if the field remains empty. You can enter an alternative GUID if you want to use a different folder for your ELOas rules.
Save rules as	Text file	Save ELOas rules created with the ELO Administration Console as extra text to an empty entry or as a text file in ELO.
Temporary directory for text files	E:\ELO\EN\temp\ELO-EN-2	Enter the directory path you want to save text files in when checking out. This is only relevant if you save ELOas rules as text files.

GUID of ELOas Base folder: The ELOas Base folder is defined as the default. This folder is also used if the field is left blank. You can enter an alternative GUID if you want to use a different folder for your ELOas rules.

Save rules as: Save ELOas rules created with the ELO Administration Console as extra text to an empty entry or as a text file in ELO.

Temporary directory for text files: Enter the directory path you want to save text files in when checking out. This is only relevant if you save ELOas rules as text files.

## Visibility of menu items on the home screen

### ▼ Visibility of menu items on the home screen


Menu item	Visible
<b>Packages</b>	
Package administration	<input checked="" type="checkbox"/>
<b>Proxy</b>	
ELO Flows configuration	<input checked="" type="checkbox"/>
ELO App Manager	<input checked="" type="checkbox"/>
ELO form designer	<input checked="" type="checkbox"/>
ELO Web Client configuration	<input checked="" type="checkbox"/>

Under *Visibility of menu items on the home screen*, you determine which menu items are available in the ELO Administration Console. Enable or disable the various options by selecting the check boxes.

Save menu as XML file (diskette icon): Select the diskette icon to create the XML file *menu.xml*, which is stored on the server in the directory `...\config\AdminConsole\\`. ELO stores the settings for the menu items of the ELO Administration Console in the *menu.xml* file. The file can be edited manually and is loaded when you restart the ELO Administration Console.

## Manage profiles

### Manage profiles

	Profile name	Indexserver URL	Version number
▶	Repository 	http:// <input type="text"/> :8090/ix-Repository/ix	23. <input type="text"/>
▶	Repository	https:// <input type="text"/> :8093/ix-Repository/ix	23. <input type="text"/>
2 known Indexservers			

You can edit the settings for the current profile here.

1. Select the entry for the current profile in the list of profiles.

The program switches to edit mode. You can change the settings for the profile and the ELO Indexserver in the input fields.

Profile name: Edit the name of the profile in the *Profile name* field.

Indexserver URL: Edit the Indexserver URL of the profile in the *Indexserver URL* field.

Hide during logon: To hide the profile when logging on to the ELO Administration Console, enable the *Hide during logon* option.

Proxy redirect logic: If you access the ELO Administration Console from the Apache Tomcat Manager page, you can use the redirect logic to select which ELO Indexserver you want to connect to. You can change the default behavior with the *Proxy redirect logic* field.

The following values apply:

- -1 = Redirect is not allowed.
- 0 = Redirect is allowed (default).
- 1 and higher = Redirect is allowed. The higher the number, the lower the redirect priority.

Repository GUID: The *Repository GUID* field contains the GUID of the repository. This is also the GUID of the top level in the repository.

2. Save the changes.

Alternative: Select *Delete* to delete a profile.

### Information

The *Delete* button does not delete the repository. It only deletes the profile in the ELO Administration Console.

## Information about the repository and the ELO Administration Console

The *Information about the repository and the ELO Administration Console* button ("i" icon) takes you to the *Information about the current user and repository* page. This page contains menu items with information about the current user and the active repository.

The screenshot shows the ELO Administration Console interface. The top header is dark blue with the text 'ELO Administration Console Repository1' and several icons (gear, info, question mark, and a door icon). Below the header is a light gray bar with the title 'Information about the current user and repository' and a blue 'OK' button. The main content area is white and contains a table of system information:

User name	Administrator
Indexserver URL	http://srvpdoksrvt02vm:8090/ix-Repository/ix [Repository]
Indexserver version	23.00.005
Language	English
Administration Console	23.00.005-build-221808

Below the table is a blue link: '> Logon activity in the ELO Administration Console'. To the right of the main content area is a 'See also' section with a blue link: 'ELO Administration Console status report'.

The information includes the *user name*, the *Indexserver URL*, the *version number* of the ELO Indexserver, the *language*, the *session ID*, and the ELO Administration Console *version*.

Logon activity in the ELO Administration Console: The *Logon activity in the ELO Administration Console* area contains information about which users have logged on to the ELO Administration Console and at which time.

Click *OK* to leave the page and return to the menu.

## Log off

This close-up screenshot focuses on the top navigation bar of the ELO Administration Console. It shows a dark blue bar with four icons: a gear (settings), an 'i' (info), a question mark (help), and a door icon (log off). The door icon is highlighted with a red square. Below the bar is a light gray area containing a blue 'OK' button and a 'See also' section with a blue link: 'ELO Administration Console status report'.







- Click *Log off* (door icon) to log out of the ELO Administration Console.

The dialog to log on to the ELO Administration Console appears again.

## ELO packages

Packages allow you to create and edit related configurations.

▼ Packages

 <b>Package administration</b> Create, export, import, and delete packages.	 <b>Accounting</b> Accounting metadata forms and aspects
 <b>ELOcore</b>	 <b>ELOrecruiting</b>
 <b>LIBRARY</b> Eine Demo Bibliotheksverwaltung als Beispiel für den Second Generation Space am ELO Partnertag 2023	 <b>Metadata form</b>

ELO packages can contain configurations for the following areas:

- Metadata forms, aspects, and fields (gen. 2)
- Forms (gen. 2)
- Groups
- ELO Teamspaces
- ELO Workspaces
- ELO Flows
- Translations
- Font colors

For more information, refer to the *ELO packages* documentation.

## Proxy

In the *Proxy* area, you can open the *ELO Flows configuration*, the *ELO App Manager*, the *ELO form designer*, the *ELO Web Client configuration*, and *ELO Smart Input*.

### ELO Flows configuration

In the *ELO Flows configuration* area, you can create, edit, and manage flows.

ELO Flows is an ELO module for easily implementing automation and integration tasks.

The screenshot shows the ELO Administration Console (ELO-EN-1) interface. The top navigation bar includes a search icon, a help icon, and a refresh icon. The main content area is titled "Flows" and "Automations". It features a "New automation" button and an "Import" button. A "Group" dropdown menu and a "Browse" search field are also present. The automation cards are arranged in a grid:

- Check\_fees\_due\_at...**: No package (DRAFT), Active status.
- Gen2**: No package (DRAFT), Incomplete status.
- Metadata\_component**: No package (DRAFT), Incomplete status.
- Service**: Accounting (DRAFT), Incomplete status.
- Write\_reminder**: No package (DRAFT), Active status.
- dynkwl**: No package (DRAFT), Incomplete status.

The sidebar on the left lists various categories: Templates (Automations, User actions, Data queries), Authentication (Credentials, Token), and Other objects (Icons, Transformations). At the bottom of the sidebar are help and refresh icons.

For more information, refer to the *ELO Flows* documentation.

## ELO App Manager

The screenshot shows the ELO App Manager interface. At the top, there is a header with the title "ELO App Manager" and a "Log off" button. Below the header, there are several buttons: "Refresh", "Add app", "Add module", "Add Client Info", and "Restore original repository state". The main area is divided into tabs: "Apps", "Client Info", "Modules", and "Templates". The "Apps" tab is active, displaying a table of applications. The table has columns for "Favo...", "App name ↑", "Test", "Vers...", "Build", "App status", "Default la...", and "Flags". The table lists several apps, including "com.elo.flows.A...", "com.elo.forms.E...", "com.elo.forms.F...", "com.elo.spaces...", "com.elo.spaces....", "elo.integration.C...", "elo.teamroom.Cl...", "elo.webapps.Ap...", "elo.webapps.Login", "elo.webapps.Wo...", and "teamroom.Team...". The "App status" column shows "Installed" for most apps and "In development" for the last one. To the right of the table, there is a "Help" section with the title "ELO App Manager" and a description: "This is where you can create and manage ELO apps, module, and Client Info objects." Below this, there is a link to the "ELO App Manager Guide".

Favo...	App name ↑	Test	Vers...	Build	App status	Default la...	Flags
<input type="checkbox"/>	com.elo.flows.A...	<a href="#">DEBUG</a>   <a href="#">PROD</a>	1.3.0	104	Installed	en	session   noangular
<input type="checkbox"/>	com.elo.forms.E...	<a href="#">DEBUG</a>   <a href="#">PROD</a>	99.0...	1	Installed	de	session   noangular
<input type="checkbox"/>	com.elo.forms.F...	<a href="#">DEBUG</a>   <a href="#">PROD</a>	23.00...	1	Installed	en	session   noangular
<input type="checkbox"/>	com.elo.spaces...	<a href="#">DEBUG</a>   <a href="#">PROD</a>	23.00...	1	Installed	en	session   noangular
<input type="checkbox"/>	com.elo.spaces....	<a href="#">DEBUG</a>   <a href="#">PROD</a>	23.00...	1	Installed	en	session   noangular
<input type="checkbox"/>	elo.integration.C...	<a href="#">DEBUG</a>   <a href="#">PROD</a>	21.01...	3	Installed	en	session   angular
<input type="checkbox"/>	elo.teamroom.Cl...	<a href="#">DEBUG</a>   <a href="#">PROD</a>	21.01...	3	Installed	en	session   angular
<input type="checkbox"/>	elo.webapps.Ap...	<a href="#">DEBUG</a>   <a href="#">PROD</a>	2	2	Installed	en	session   noangular
<input type="checkbox"/>	elo.webapps.Login	<a href="#">DEBUG</a>   <a href="#">PROD</a>	2	2	Installed	en	nosession   noangular
<input type="checkbox"/>	elo.webapps.Wo...	<a href="#">DEBUG</a>   <a href="#">PROD</a>	21.01...	2	Installed	en	session   angular
<input type="checkbox"/>	teamroom.Team...	<a href="#">DEBUG</a>   <a href="#">PROD</a>		1	In development	en	session   angular

In the *ELO App Manager* area, you can manage the ELO Apps from ELO Solutions and ELO integrations, for example.

You also have the ability to develop and control your own apps.

For more information, refer to the *ELO Apps API Documentation* (only available in English). This documentation must be downloaded and installed separately. You can find the *ELOWf API Doc* ZIP package on the ELO SupportWeb under *<Version> > ELO Web Forms Services (ELOWf) > Downloads*. You can find an installation guide in the ZIP package in the *Readme.txt* file.

You can find an overview of the URLs to access the documentation in the *ELO workflow* documentation under *Advanced functions > Events and global functions*.

## Form designer

In the *Form designer* area, you can create, edit, and manage forms and templates for the form-based workflow.

ELO Administration Console Repository ⚙️ ⓘ ? ↗️

Form New	Template Table Insert	Tab group Refresh Assignment System	Close	
-------------	-----------------------------	--	-------	--

Forms	Components for order
basic_claim	approval <span style="float: right;">✎ ✕</span>
freeentry	article <span style="float: right;">✎ ✕</span>
invoice	article_protection <span style="float: right;">✎ ✕</span>
multitab	articles <span style="float: right;">✎ ✕</span>
offline_scriptexamples	basic <span style="float: right;">✎ ✕</span>
order	extra <span style="float: right;">✎ ✕</span>
other	fruits <span style="float: right;">✎ ✕</span>
scriptexamples	item <span style="float: right;">✎ ✕</span>
test	item_protection <span style="float: right;">✎ ✕</span>
tst	order <span style="float: right;">✎ ✕</span>
	purchaser <span style="float: right;">✎ ✕</span>
	tab1 <span style="float: right;">✎ ✕</span>
	tabs <span style="float: right;">✎ ✕</span>
	Edit form header scripts <span style="float: right;">✎ ✕</span>

You will find more information on how to use forms under *Form workflow > The form designer* in the *ELO workflow* documentation.

## ELO Web Client configuration

From here, you automatically switch to the configuration section of the ELO Web Client.

ELO Administration Console (ELO-EN-1)

← ELO Configuration

Configuration for: Byte Apply ribbon settings Select user Reset my view data

**CATEGORIES**

- Display
- Dialog boxes
- Metadata
- Document preview
- Favorites
- Keyboard shortcuts
- Functions
- Administration
- Configuration sets

**General**

- Maximum number of entries in the folder: 100
- Improved list functions (infinite scrolling and server-side sorting)
- Open supported documents with Office Online
- Show preview documents with the web preview
- Show preview in background

**Appearance**

- Color scheme: Dark navy
- Enable ribbon
- Use simple ribbon
- Show document date in the tree view

Condition: The ELO Web Client must be installed and functioning correctly for this option to be available.

You will find more information on the ELO Web Client and its configuration in the *ELO Web Client* and *ELO Web Client administration* documentation.

## ELO Smart Input

In the *ELO Smart Input* area, you perform the settings for the server module *ELO Smart Input*. You may need to log on to ELO Smart Input.

### Information

The *ELO Smart Input* area is only displayed if you have installed the module.



The screenshot shows the 'Incoming Invoice' configuration page in the ELOsi administration system. The page has a dark blue header with navigation links: 'ELOsi administration', 'Metadata mapping', 'Contents', 'Data', 'Client tiles', 'Settings', 'Help', and 'Log off'. A left sidebar contains a menu with items: 'Action definition', 'Basic entry', 'E-mail', 'ELO Business Solution', 'ELO Business Solution Configuration', 'ELO user folder', 'ELOScripits', 'Folder', 'Incoming Invoice' (highlighted), and 'Search'. The main area is titled 'Incoming Invoice' and includes a 'Save' button. Below the title, there are three input fields: 'Filing path \*', 'Template short name', and 'Trigger workflow'. At the bottom, there is a table with columns 'Label', 'Field template', and 'Content', and a '+ Add' button.

ELO Smart Input analyzes the full text of a document and extracts data from it, such as addresses, sums, or e-mail addresses. Users receive suggestions for automatically detected data, which they can apply to the metadata.

ELO Smart Input is based on an incoming and target folder principle.

1. The incoming folder is where you save documents that have not yet been assigned metadata.
2. Use ELO Smart Input to enter the metadata.
3. The documents tagged with metadata are moved to a specified target folder or a folder created dynamically via the metadata form.

ELO Smart Input recognizes the following patterns by default:

- Amounts (net, VAT, gross)
- Addresses
- IBAN
- Date
- E-mail addresses
- Telephone numbers
- VAT ID
- Custom regular expressions

For more information, refer to the *ELO Smart Input* documentation.

## Servers

In the *Servers* area, you can open the settings for *ELO Azure Administration*.

### Information

This area is only available if ELO Azure Administration was installed using the ELO Server Setup.

## ELO Azure Administration

ELO Azure Administration is a service for managing app registrations for Microsoft Azure.

The screenshot displays the ELO Administration Console interface. The top navigation bar shows 'ELO Administration Console (ELO-DESKTOP-8LUHTIV-1)' and includes settings, help, and share icons. The main content is split into two panels. The left panel, titled 'Microsoft Azure services', contains a 'Sign in to Microsoft Azure' section with user details (Name: Admin ELO DOKU, User name: administrator@elodocumentation.onmicrosoft.com, Tenant ID: a1656576-c91f-4204-8389-13aec52af44b) and a 'Sign out' button. Below this is a 'Services' list with 'New Service' and 'Refresh' buttons, showing 'ELOauth' with an Azure app ID of '829e0e0e-caa2-44' and a 'Registered' status. The right panel, titled 'ELOauth', shows 'Data for registration in Microsoft Azure' with options for 'R...', 'Synchr...', 'Admin consent for ...', and 'Remove service'. It includes fields for 'Azure application name \*' (ELOauth), 'Azure app ID' (829e0e0e-caa), 'Redirect URIs' (Add URI), 'Zertifikat' (Browse), 'Required permissions' (Azure resource ID, Name), and 'Roles' (Add role).

The following ELO apps can currently be registered via ELO Azure Administration:

- ELO Bot for Microsoft Teams
- ELOauth

For more information, refer to the ELO Azure Administration documentation:

## System settings

This chapter describes the settings for the *User and group administration*, *Organizational units*, *Metadata forms and fields*, *Field templates*, *Keyword lists*, *Entry types*, *Document paths*, *Default document paths*, *Encryption keys*, *Manage URLs*, *Stamps*, *Repository properties*, and *Font colors*.

### Manage users and groups

The screenshot displays the 'Users and groups' management interface. On the left, a table lists various groups, with 'GRP\_ADMIN' highlighted. On the right, the configuration panel for 'GRP\_ADMIN' is shown, featuring tabs for 'Basic settings', 'Group membership', and 'User rights'. The 'Basic settings' tab is active, showing fields for Name (GRP\_ADMIN), E-mail address, Administrator, and Supervisor. Under the 'Usage' section, there are checkboxes for 'Visible in user lists' (checked), 'Option group', 'Substitution allowed', and 'Functional role' (checked). The 'Properties' section at the bottom has two empty input fields labeled '1 property' and '2 property'.

ID	Name	Windows users	E-mail address
0	Administrator		
1	ELO Service	eloservice	
2	GRP_ADMIN		
3	GRP_POST		
4	GRP_SALES		
5	GRP_SECR		
6	GRP_STANDARD		
7	ELO_PowerUsers		
8	ELO_StandardUsers		
9	ELO_ViewUsers		
10	HR department		
11	ELO_PowerUsers		
12	ELO_StandardUsers		

Everyone who uses ELO needs a corresponding ELO account. These accounts are created, configured, and managed in the user administration.

Groups can be used to manage permissions and basic settings in ELO.

You will find more information under Configuration and administration > User administration > Groups.

You will find more information on groups in ELO packages under [ELO packages > Users and groups](#).

## Organizational units

The screenshot shows a 'New organizational unit' form. On the left, there is a sidebar with a search bar and a list area showing 'No data'. The main form area has a title bar with 'New organizational unit' and 'Save' and 'Cancel' buttons. Below the title bar is an information message: 'If users belong to an organizational unit, they see the members of that organizational unit in the user lists.' The form contains the following fields:

- Name:
- Description:
- Property 1:
- Property 2:
- Property 3:
- Property 4:

Below the properties is a 'Members' section with a dropdown arrow and the label 'Members'. It contains an 'Add members' button and a table with the following content:

Members
No data

In this menu item, you can manage organizational units.

Organizational units provide a way to classify users.

You will find more under *Organizational units* in the *User management* documentation.

### Metadata forms and fields (gen. 1)

Description: You can create and manage metadata forms (gen. 1) in the *Metadata forms and fields* area.

#### Information

You need to create the field templates required for the metadata forms before you create the metadata form. You can use field templates in different metadata forms.

For more information, refer to the *Metadata forms and fields* documentation.

You will find information on metadata forms and aspects (gen. 2) under *ELO packages* in the *Metadata* documentation.

## Field templates (gen. 1)

You can define templates for fields (gen. 1) in the *Field templates* area. These templates can be used to create metadata forms in the *Metadata forms and fields* area.

You will find more information under *Field templates* in the *Metadata forms and fields* documentation.

You will find information on metadata forms and aspects (gen. 2) under *ELO packages* in the *Metadata* documentation.

## Keyword lists

Type	Name	Search for
●	ELOSTD5WL	
☰	(3C15B978-F81C-CDEC-50AB-7CAF30E4...	
☰	COMPANY NAME	
☰	CUSTOM.NEW_KEYWORDLIST_1	
☰	CUSTOM.NEW_KEYWORDLIST_2	
☰	CUSTOM.NEW_KEYWORDLIST_3	
☰	CUSTOM.NEW_KEYWORDLIST_4	
☰	CUSTOM.NEW_KEYWORDLIST_5	
☰	ELONOTE1	
☰	LIBRARY.BOOK_TYPE	
☰	LIBRARY.GENRE	
☰	LIBRARY.ID_CARD_TYPE	

**LIBRARY.BOOK\_TYPE** Save Cancel

Field group: LIBRARY.BOOK\_TYPE Import... Export as XML Export as TXT

Search for:

PAPERBACK  
 POCKETBOOK  
 HARDCOVER  
 E\_BOOK

+  
✖  
↕  
↕

Merge keyword ⓘ  
 Disable keyword ⓘ

Create new keyword lists and edit existing keyword lists in the *Keyword lists* area.

Keyword lists help you enter and standardize metadata.

You will find more information under *Keyword lists* in the *Metadata forms and fields* documentation.

You will find more information under *ELO packages > Keyword lists* in the *Metadata* documentation.

## Entry types

By assigning entry types, you can see what type of entry you are dealing with at a glance. The icons that are used can be customized.















Entry types

Save

Cancel

 ⓘ

## ▼ Icons and definitions for folders

ID	Icon	Definitions	16 px	32 px	64 px	128 px	
9999		<input type="text" value="Repository"/>	✓	✓	✓	✓	✗
1		<input type="text" value="Cabinet"/>	✓	✓	✓	✓	✗
2		<input type="text" value="Folder"/>	✓	✓	✓	✓	✗
3		<input type="text" value="Tab"/>	✓	✓	✓	✓	✗
4		<input type="text" value="Level 4"/>	✓	✓	✓	✓	✗
5		<input type="text" value="Level 5"/>	✓	✓	✓	✓	✗
6		<input type="text" value="Level 6"/>	✓	✓	✓	✓	✗
7		<input type="text" value="Red folder"/>	✓	✓	✓	✓	✗
8		<input type="text" value="Yellow folder"/>	✓	✓	✓	✓	✗
9		<input type="text" value="Green folder"/>	✓	✓	✓	✓	✗
10		<input type="text" value="Blue folder"/>	✓	✓	✓	✓	✗
11		<input type="text" value="Red tab"/>	✓	✓	✓	✓	✗
12		<input type="text" value="Yellow tab"/>	✓	✓	✓	✓	✗
13		<input type="text" value="Green tab"/>	✓	✓	✓	✓	✗

For more information, refer to the *Entry types* section of the *System administration* documentation.

## Document paths

ELO manages storage media (physical storage) using document paths. In the *Document paths* area of the ELO Administration Console, you can set up new media, make moved media accessible again, or check the free storage space on a medium. The document path specifies where the documents are stored physically.

basis		Save	Cancel								
Name	basis										
Path	E:\ELO\EN\archive\Repository\basis\data										
Preview path	E:\ELO\EN\archive\Repository\basis\preview										
Full text path	E:\ELO\EN\archive\Repository\basis\fulltext										
Structure	1M directories with 4K documents										
<input type="checkbox"/> Use as backup path <input type="checkbox"/> Do not restore from backup path <input type="checkbox"/> Read-only <input type="checkbox"/> WORM path											
<table border="1"> <tr> <td><b>i</b> Internal ID</td> <td>1</td> </tr> <tr> <td>Created on</td> <td>09.04.2021 08:18</td> </tr> <tr> <td>Default path</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Last changed on</td> <td>21.07.2021 13:44</td> </tr> </table>				<b>i</b> Internal ID	1	Created on	09.04.2021 08:18	Default path	<input checked="" type="checkbox"/>	Last changed on	21.07.2021 13:44
<b>i</b> Internal ID	1										
Created on	09.04.2021 08:18										
Default path	<input checked="" type="checkbox"/>										
Last changed on	21.07.2021 13:44										

You will find more information under *ELO Server > Document paths* in the *Repository & documents* documentation.

## Default document paths

In the *Default document paths* area, you specify which paths to use as document paths or restore paths.

Default document paths		Save	Cancel
Default document paths	basis		
	No other default path		
	No other default path		
	No other default path		
Default filing method	<input type="radio"/> Parallel <input checked="" type="radio"/> Sequential		
Restore path			

You will find more information under *ELO Server > Default document paths* in the *Repository & documents* documentation.

## Encryption keys

The encryption keys used in ELO are managed in the *Encryption keys* area. Documents encrypted with these keys are encrypted and assigned a password.

ACCT		Save	Cancel
Name	<input type="text" value="ACCT"/>		
Old password	<input type="text"/>		
New password	<input type="text"/>		
Confirm new password	<input type="text"/>		
System user	<input type="text" value="Search for"/>		
Old password	<input type="text"/>		
New password	<input type="text"/>		
Confirm new password	<input type="text"/>		

You will find more information under *Encryption keys* in the *System administration* documentation.

## Manage URLs

In the *Manage URLs* area, you enter the URLs for different ELO modules.

Manage URLs		Save	Cancel
ELO Analytics URL	<input type="text" value="ELO Analytics URL"/>		
External ELO Analytics URL	<input type="text" value="External ELO Analytics URL"/>		
ELO online help URL	<input type="text" value="https://docs.elo.com/"/>		

You will find more information under *ELO Server > Manage URLs* in the *Repository & documents* documentation.



## Stamps

You can use stamps on documents in ELO just as you would on paper documents. In the *Stamps* area, you can create new stamps, or edit and delete existing stamps.

Settings for: Everyone (global) Select user

**Approved** Save Cancel

ID: 268431361

Name: Approved

Text: Approved

Font: 36 B I U S Color

Preview: **Approved**

**Stamp permissions**

Add user or group

Search for: User or group with permissions

Everyone RWDEP

- View (R)
- Change (W)
- Delete (D)
- Move (E)
- Set permissions (P)

AND group Owner rights

The stamps are available to users in the viewer pane in the ELO Java Client.

You will find more information under *Stamps* in the *System administration* documentation.

## Repository properties

In the *Repository properties* area, you can change the display name for the repository.

**Repository properties** Save Cancel

Display name: Our Company Info

The display name is used in different places. For example, as the name of the top repository level. Similarly, it is used as the name of the main tile for the *Repository* work area in the clients.

### Please note

Altering the display name does not change the actual name of the repository.

You will find more information under *Repository properties* in the *System administration* documentation.

## Font colors

The colors used to display entries are defined in the *Font colors* area. You can assign a separate color for each document and folder type.

Name	ID
System color	0
Red	1
Green	2
Blue	3

**System color** [Save] [Cancel]

Name: System color

ID: 0

Enable selection of color in the client

Color values

Color picker showing a gradient from purple to red. Numerical input fields: R: 0, G: 0, B: 0, H: 300, S: 0, B: 0. Hex input field: # 000000

You will find more information under *Font colors* in the *System administration* documentation.

You will find information about font colors in ELO packages under *ELO packages* > *Font colors* in the *Other topics* documentation.


## Maintenance


This chapter provides descriptions and explanations of the settings for *Administration mode*, *Report options*, *Delete and remove*, *Backup tasks*, *Password rules*, and *Move document files*.

### Administration mode

Administration mode can be used to restrict client access to ELO, e.g. during system maintenance.

Administration mode is currently disabled.

 **Enable administration mode**

 When administration mode is enabled, users without main administrator rights will not be able to log on to the repository.  
Administration mode is active for all repositories that are accessed by the same ELO Access Manager.

#### Information

Only administrators can access the ELO clients! Administration mode is active for all repositories that are run by the same ELO Access Manager.

### Report options

In the *Report options*, administrators can define the settings for log files and logged activities in ELO.

Report options		Save	Cancel	See also <a href="#">Delete report entries</a>
Report mode				
<input type="radio"/> No report <input type="radio"/> Short report <input type="radio"/> Extended report <input checked="" type="radio"/> Full report				
Name	Search for	Settings for the short report	Settings for the extended report	
Open ELO		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Close ELO		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
User data changed		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Font color changed		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Form definition changed		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Path definition changed		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Key data changed		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Document created		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

### Information

You create a report in the ELO Java Client with the standard configuration via *Organize > Properties > Report for entry*.

You will find more information under *ELO Server > Report options* in the *Maintenance and monitoring* documentation.

## Delete report entries

The *Delete report entries* function enables you to delete report entries up to a specific date.

Delete report entries	Delete
<input checked="" type="radio"/> Delete up to the following date	
<input type="text" value="27-Jun-23"/>	
<input type="radio"/> Delete all report entries	

You will find more information under *ELO Server > Delete report entries* in the *Maintenance and monitoring* documentation.

## Delete and remove

The *Delete and remove* area contains the settings for deleting and removing documents from the repository.

### Delete and remove

#### ▼ Delete permanently

- Remove deleted entries
- Remove deleted document versions and attachment versions

Deletion date until  

#### Delete permanently

**i** Depending on the settings, all entries/versions that were deleted before the date specified will be permanently removed from ELO. These entries cannot be restored afterwards.  
This process runs in the background and may take a long time depending on the size of the repository.

#### ▼ Delete entries whose retention period has expired

- Documents only
- Documents and folders

#### Delete entries whose retention period has expired

**i** The entries will be marked as deleted. They can be restored or deleted permanently with the corresponding functions.

You will find more information under *Delete and remove* in the *System administration* documentation.

## Backup tasks



In the *Backup tasks* area, you define the settings for backups.

Backup tasks		See also
Backup profiles:	<input type="button" value="Start"/>	<a href="#">Document paths</a>
Backup and purge:	<input type="button" value="Start"/>	<a href="#">Backup profiles</a>
<b>Automatically purge old documents</b> <input type="button" value="Save"/> <input type="button" value="Reset"/>		
Minimum age in days	<input type="text" value="1000"/>	
Compare mode	<input type="text" value="Compare size"/> ▼	
Document path	<input type="text" value="All document paths"/> ▼	
Start hour	<input type="text" value="20"/> ▼	

You will find more information under *ELO Server > Backup* in the *Repository & documents* documentation.

## Password rules

In the *Password rules* area, you define the password security settings.

Type	Option group	Search for	Global		<input type="button" value="Save"/>	<input type="button" value="Cancel"/>
	Global		Days valid	<input type="text" value="0"/>		
	OPT_GRP_STANDARD		Min. length	<input type="text" value="0"/>		
			<input type="checkbox"/>	At least one letter		
			<input type="checkbox"/>	At least one special character		
			<input type="checkbox"/>	At least one uppercase and one lowercase letter		
			<input type="checkbox"/>	At least one number		

You will find more under *Password rules* in the *User management* documentation.

## Move document files

In the *Move document files* area, you can move files, file versions, attachments, and/or attachment versions to a different document path. The repository structure remains the same.

Move document files [Restore default settings](#)

Source path  ▼

Target path  ▼

Filing date range

from  ⌵ to  ⌵

[Count](#) [Move](#)

See also  
[Document paths](#)

You will find more information under *ELO Server > Move document files* in the *Repository & documents* documentation.

## Server modules

The *Server modules* area contains the areas *ELO Automation Services*, *Backup profiles*, *Create password*, and *ELO Transport*.

### ELO Automation Services

ELO Automation Services are used to automate tasks within ELO. This area of the ELO Administration Console is where you enter rulesets for ELO Automation Services.

The screenshot displays the configuration interface for an ELO Automation Service. On the left, a list of services is shown with 'ELOxcMoveAsync' selected. The main area, titled 'ELOas Base', contains the following fields and options:

- Name:** ELOxcMoveAsync
- ID:** (2532033C-D501-33DB-4071-A5632C935739)
- Search form:** E-mail
- Index search:** DIRECT
- Search term:** ""
- Search max.:** 1
- Advanced search:** >
- Target forms for rules selection:** >
- Interval control:** >
- Includes:** >
- Rules:** >

Buttons for 'Save' and 'Cancel' are located in the top right corner of the configuration area.

For more information, refer to the *ELO Automation Services* documentation.

### Backup profiles

In the *Backup profiles* area, you enter the settings for the backup profiles.

#### Please note

Before you can create a backup profile, you must have defined a document path. Once you have done so, the document path will be available in the backup profiles.



Name

No data

New backup profile
Save Cancel

Profile name

SQL Select

999 Letters remaining

Packet size

Document path  ▼

Slot number  ▼

Save

Include metadata

You will find more information under *ELO Server > Backup service* in the *Repository & documents* documentation.

## Create password

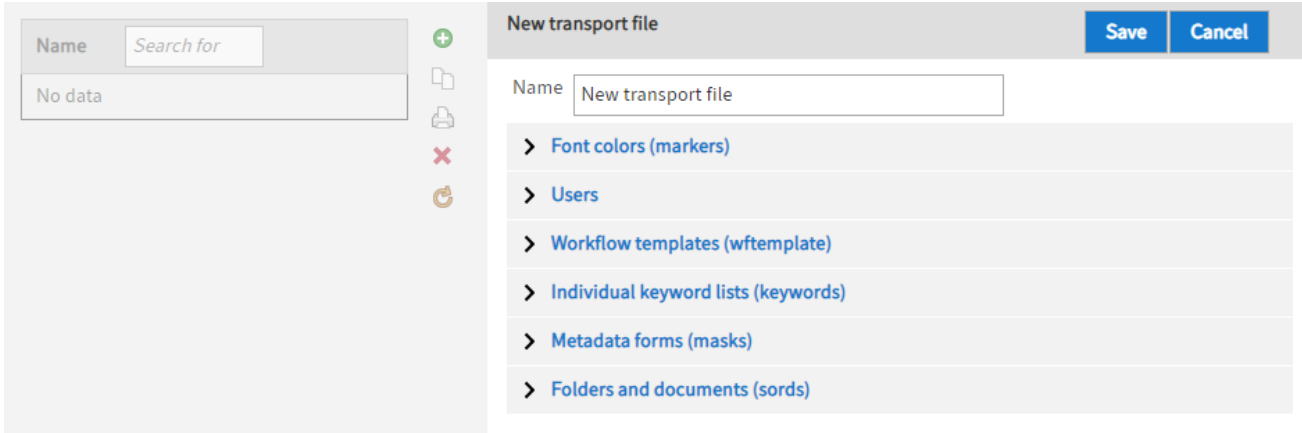
In the *Create password* area, you can create encrypted/encoded passwords for ELO.

Password	
Input	<input style="width: 100%; height: 25px;" type="text"/>
Encrypted ELO password	<input style="width: 100%; height: 40px;" type="text"/>
Encrypted ELOas database password	<input style="width: 100%; height: 40px;" type="text"/>
Coded Base64 password	<input style="width: 100%; height: 40px;" type="text"/>

You will find more information under *ELO Server > Passwords* in the *Repository & documents* documentation.

## ELO Transport

The *ELO Transport* area is used to create transport files. A transport file can contain information about ELO users, font colors, keyword lists, metadata forms, folders, and documents. The information is stored in a file that can be imported into an ELO repository.



The screenshot shows a user interface for creating a new transport file. On the left, there is a search bar with the text 'Name Search for' and a 'No data' message below it. To the right of the search bar are several icons: a green plus sign, a folder icon, a document icon, a red 'X' icon, and a circular refresh icon. The main area is titled 'New transport file' and has a 'Save' button and a 'Cancel' button in the top right corner. Below the title bar, there is a text input field labeled 'Name' containing the text 'New transport file'. Below the input field is a list of expandable categories, each with a right-pointing chevron icon:

- > Font colors (markers)
- > Users
- > Workflow templates (wftemplate)
- > Individual keyword lists (keywords)
- > Metadata forms (masks)
- > Folders and documents (sords)

You will find more information under *ELO Server > ELO Transport* in the *Update and migration* documentation.

## System information

These functions help you manage users and the system. This chapter provides information about the *Server information*, *Users in system*, *Statistics*, *License overview*, *License report*, and *Test checksum* areas.

### Server information

The *Server information* area contains an overview of the server settings.

Server information	
Server information	
Name	Value
Version number	23. [REDACTED]
Repository ID	
Database system	MSSQL
Server name	ELO-EN-1
missing key: SERvertime	Mon Jul 03 10:04:04 CEST 2023
missing key: SERVERSTREAMVERSION	23. [REDACTED]
missing key: POSTBOXDISABLED	false
Additional Indexservers assigned to ELO Access Manager	
Repository name	URL
Repository	http:// [REDACTED] :8093/ix-Repository/ix

See also

- [License overview](#)
- [Users in system](#)
- [Statistics](#)
- [License report](#)

### Users in system

In the *Users in system* area, you will find an overview of the users currently logged on to the system.

Users in system <span style="float: right;">Reset filter</span>								
No.	User	<input type="text" value="Search for"/>	System	<input type="text" value="Search for"/>	Application	Version	Valid until	Ticket
1	Administrator		IX		ELO Administration Console	23.	27.06.2023 13:44	508A1F1730B1A78D.
2	Anderson				ELO Java Client	21.	27.06.2023 13:44	CAFC0E30383A465E.
3	Cole				ELO Desktop Client	23.	27.06.2023 13:43	0A4CBEDAC0AA45A3.
4	Administrator				ELO Workflow Services	23.	27.06.2023 13:43	97E9C3F03FD1606E.
5	Santini				ELO Web Client	23.	27.06.2023 13:43	0EDA2B8C8E3A7694.
6	Edwards		IX		ELO Administration Console	23.	27.06.2023 13:43	5D440D7658101FCA.
7	Administrator		IX		ConfigEditor	0.0.0	27.06.2023 13:41	A3CE67AFBDA474BA.
8	ELO Service [ELO Service]		IX		ELO FT Plugin	23.	27.06.2023 13:41	64005FD5009C63B7.
9	Edwards		IX		ELO Administration Console	23.	27.06.2023 13:41	8C591DF9823C862E.
10	ELO Service		ELO Workflow Services		ELO Workflow Services	23.	27.06.2023 13:40	C5F982E3A61EDA24.
11	Byte		IX		ELO Workflow Services	23.	27.06.2023 13:40	5AE28925E0F01863.

## Information

User accounts for various services and modules are shown here.

## Statistics

Description: This contains an overview of the IDs assigned in the repository.

### Statistics

Name	Highest ID currently assigned
Entry ID	2798
Document ID	2877

## License overview

The *License overview* area provides an overview of the license usage.

## License overview

Name	Value
Customer name	presentation license EU (838) - ELO Digital Office GmbH
Other name	Not for resale
Valid until	31.03.2024
Product	23e
Number of full clients	20
(reserved)	20
Page volume ERP Data Transfer module	100
Number of ELO Workflow Client for SAP® ERP licenses	20
(reserved)	0
Number of Indexserver licenses	20
Number of Web Client licenses	20
Number of ELOxc licenses	20
Number of external Teamroom Client licenses	20

## See also

[Users in system](#)[Server information](#)[Statistics](#)[License report](#)

You will find more information under *ELO Server > License information* in the *Maintenance and monitoring* documentation.

## License report

The *License report* page provides you with a report about access and used licenses in ELO as well as information about the users who have performed write actions via the full clients and via the Indexserver.

License report		Refresh
See also		
<a href="#">License overview</a>		
<a href="#">Users in system</a>		
<a href="#">Server information</a>		
<a href="#">Administration folder</a>		
<a href="#">Statistics</a>		
Licenses and access	Number	
Total number of licenses for access via the full client	20	
Total number of licenses for access via the Indexserver	20	
Total number of licenses for access via the Web Client	20	
Active users with full client access	2	
Active users with Indexserver access	1	
Active users with Web Client access	0	
Currently locked users with access within the licensing period	1	
Comparison	Number	
Available licenses minus write actions in the full client	18	
Available licenses minus write actions on the Indexserver	19	
Available licenses minus write actions in the Web Client	20	
Users and groups	Number	
Existing groups	19	
Existing users	13	
Locked users	0	
Existing users and groups	32	
<a href="#">Download report</a>		

You will find more information under *ELO Server > License information* in the *Maintenance and monitoring* documentation.

## Test checksums

In the *Test checksums* area, you can test the integrity of one or more documents.

## Test checksums

Document IDs to check

 Full report

Last document ID checked 0

Number of incorrect checksums 0

Number of correct checksums 0

Number of failed access requests 0

## See also

[License overview](#)[Users in system](#)[Server information](#)[Administration folder](#)[Statistics](#)[License report](#)



You will find more information under *ELO Server > Test checksum* in the *Maintenance and monitoring* documentation.

## Other menu items

This page provides a summary of the *Clients*, *Others*, *LDAP*, and *ClientInfos* areas.

### Clients/ELO for Mobile Devices

In the *ELO for Mobile Devices* area, you can modify the available functions in the *ELO app (Android)* and *ELO app (iOS)*. You can grant or restrict specific users or groups access to work areas and functions.

Settings for:  Everyone (global)
 Select user

ELO for Mobile Devices
Save
Cancel

Set by:		Hide work areas
Everyone (global)		<input type="checkbox"/> Clipboard
Everyone (global)		<input type="checkbox"/> Data sets
Everyone (global)		<input type="checkbox"/> In tray (iOS only)
Everyone (global)		<input type="checkbox"/> Offline
Everyone (global)		<input type="checkbox"/> QR code (iOS only)
Everyone (global)		<input type="checkbox"/> Repository
Everyone (global)		<input type="checkbox"/> Search
Everyone (global)		<input type="checkbox"/> Tasks

Set by:		Hide functions
Everyone (global)		<input type="checkbox"/> Accept workflow
Everyone (global)		<input type="checkbox"/> Copy to Clipboard

Settings for: You can see who the settings apply for next to *Settings for*.

Select user: Select *Select user* to open the *Select user or group* dialog box. In the *Select user or group* dialog box, you can select the user or option group that you want to edit the settings for.

#### Information

To edit the settings for all users (global), select the *Everyone* group.

Work areas: In the *Work areas* table, you can enable or disable work areas for the selected user/group.



Functions: In the *Functions* table, you can enable or disable functions for the selected user/group.

Set by: In the *Set by* column, you can see whether a setting has been assigned to an individual user or through an option group.

For more information, refer to the *ELO mobile apps* documentation.

## Others/Block access

Under *Block access*, you can restrict access to ELO based on membership of a selected group.

You will find more under *Block access* in the *User management* documentation.

## LDAP

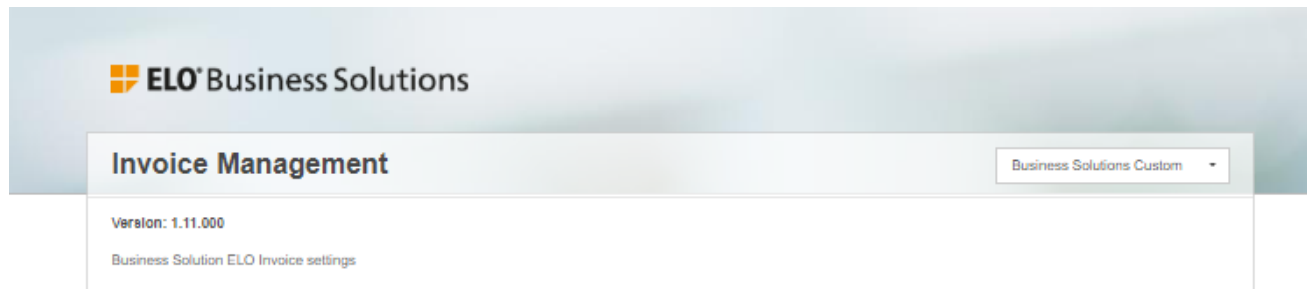
The following menu items are available in the *LDAP* area:

- LDAP import
- LDAP interface configuration
- Enable LDAP authentication

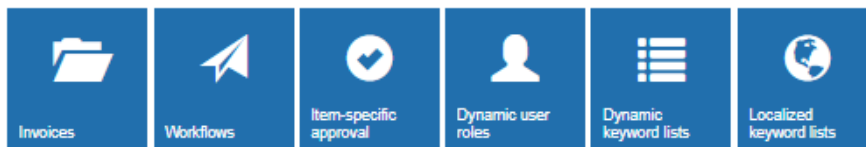
You will find more under *LDAP* in the *User management* documentation.

## ClientInfos

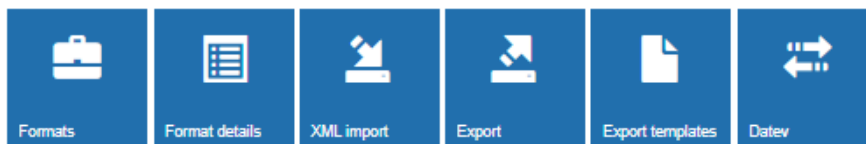
The *ClientInfos* menu area is visible if you have installed ELO Business Solutions.



### Configuration



### Data exchange



Depending on what you select, you will see options for the respective ELO Business Solution.

For detailed information, refer to the documentation for the respective ELO Business Solution.