



Configuration and administration

ELO Administration Console



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ELO Administration Console

Introduction

Copyright notices

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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. Refer to the information in the ELO Server Setup.

Installation

You can install the ELO Administration Console using the ELO Server Setup program.

For more information, refer to the documentation [ELO server > Installation and operation > Installation](#).

Start and login

Starting with ELO 23.5, users log in with ELO Modern Authentication. You will find more information in the documentation under [ELO Indexserver > Plug-ins > ELO Modern Authentication \(Auth 2\)](#).

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

`https://<ELO server with installed ELOac>:<Port>/ix-<target-repository>/plugin/auth2/sign-in`

Example: `https://eloserver:9093/ix-EXTEN/plugin/auth2/sign-in`

After logging in with ELO Modern Authentication, you can choose whether you want to be redirected to the ELO Administration Console, to the configuration of ELO Modern Authentication (Auth2 administration), or to the ELO Web Client.

Information

You can open the ELO Administration Console directly using the following syntax:

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

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

If you are running multiple repositories, you can switch to another repository by changing the URL.

Information

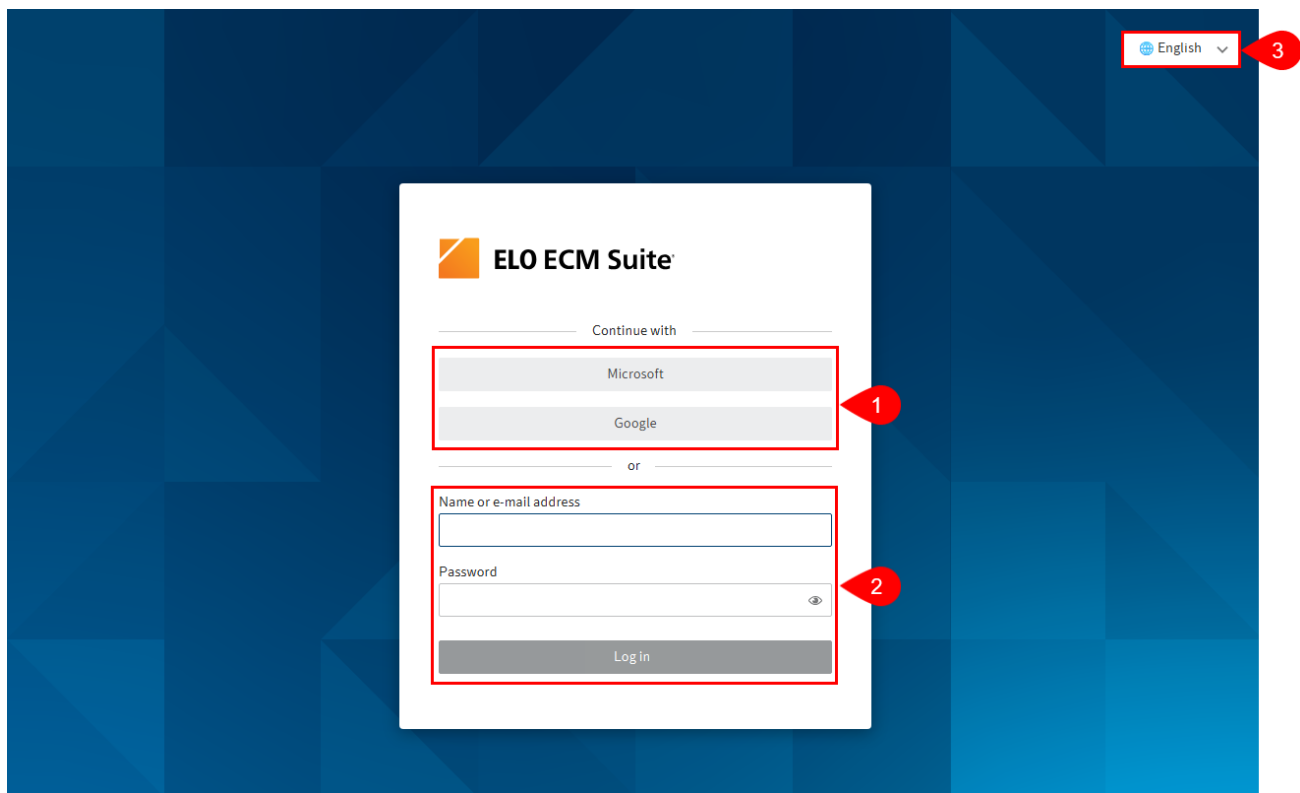
Save the different URLs as a bookmark or link for quick access to the different URLs.

Login screen

If you have entered a correct URL, the login screen appears.

Information

If single sign-on (SSO) is enabled and a valid session exists, you will be redirected to the ELO Administration Console home screen.



Depending on the configuration, you have the following options on the login page:

- 1 Log in with an identity provider if you have made the corresponding setting in the configuration.
- 2 Log in with ELO account data if you haven't configured an OpenID identity provider or you want to log in via ELO directly.
- 3 Select language

Beachten Sie

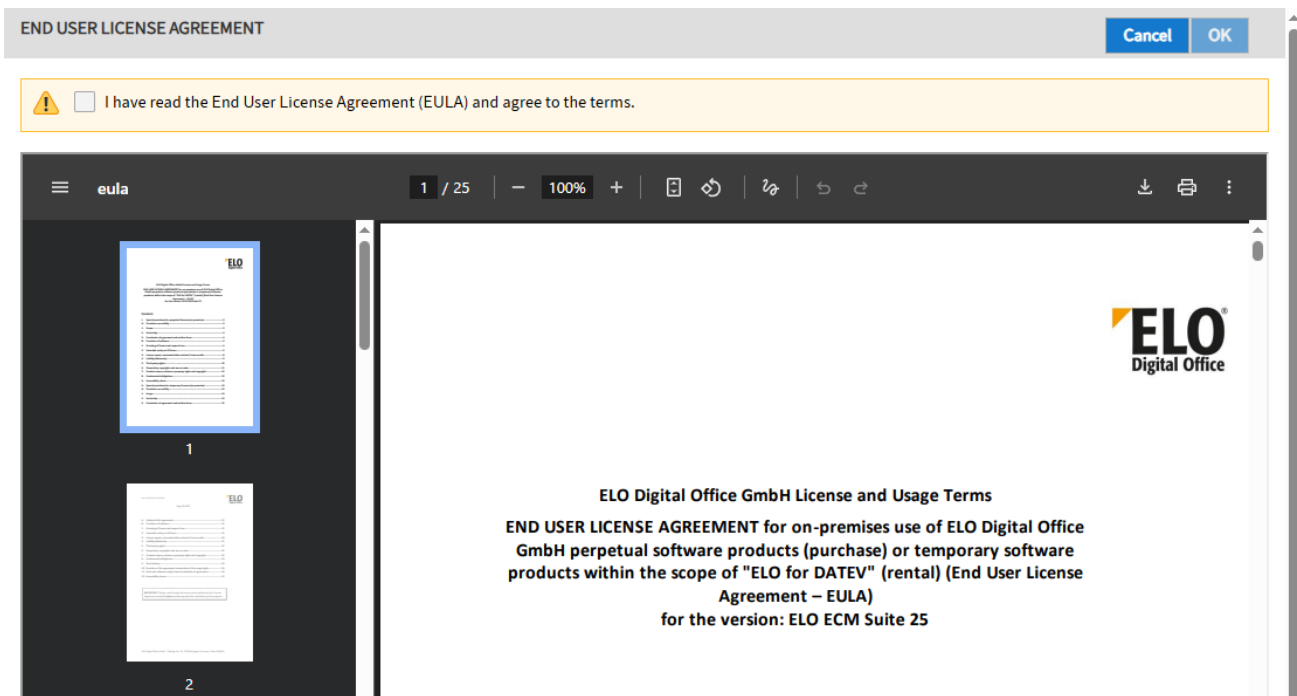
You cannot log in with the user ID.

Example: You cannot log in as an administrator with the ID 0 but must enter the name or e-mail address.

Information

A user's functional roles are automatically enabled when the user logs in to the ELO Administration Console.

Initial login



The first time you log in, you must accept the end user license agreement (End User License Agreement).

Please note

Until you accept the license agreement, the ELO Indexserver displays the message *EULA must get accepted* and cannot be used.

ELO Cloud Business Edition

In environments based on ELO Cloud Business Edition, you must change the password of the *Administrator* account in addition to accepting the license agreement.

For more information, refer to the [ELO Cloud Business Edition](#) documentation.

Menu area

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



The upper section of the menu area, the topbar, contains the following areas:

- ELO Administration Console <name of repository>: This is where you open the ELO Administration Console home screen with the groups.
- 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 out: Log out of the program.

The *Configuration*, *Information about the repository and the ELO Administration Console*, and *Log out* areas 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
- System settings
- Maintenance
- Server modules
- System information
- Clients
- LDAP
- Others

You can find more information about the different groups 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



▼ ELO Administration Console home screen options

Menu item display settings

Title and description ▼

✓
✗

Title and description

Title only

window

Behavior when menu item 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 a menu item.

▼ 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.

Temporary directory for text files

H:\ELO\temp\ELO-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 desired option.

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 item 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 a menu item.

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

Behavior when menu item is clicked: Specify whether you want the page to open in a new window or in the same window when you select a menu item, or whether *parent* or *top* is entered for HTML frames.

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.

Temporary directory for text files

H:\ELO\temp\ELO-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.

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
Packages	
Package administration	<input checked="" type="checkbox"/>
Device management	<input checked="" type="checkbox"/>
Proxy	
ELO Flows administration	<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"/>
Configuration for Microsoft Azure	<input checked="" type="checkbox"/>
ELO Sync	<input checked="" type="checkbox"/>
E-mail administration	<input checked="" type="checkbox"/>
Artificial intelligence	<input checked="" type="checkbox"/>
System settings	
Login settings	<input checked="" type="checkbox"/>

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

Manage profiles

▼ Manage profiles

	Profile name	Indexserver URL	Version number
▶	EXTEN 	https://S M:9093/ix-EXTEN/ix	
▶	Repository	https://S M:9093/ix-Repository/ix	
▶	Archive	https://S M:9093/ix-Archive/ix	
3 known Indexservers			

You can edit the profile settings in the *Manage profiles* area.

- 1.

Select the entry of the profile you want to edit in the table.

The program switches to edit mode.

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

Indexserver URL: You see the Indexserver URL of the profile in the *Indexserver URL* field.

Hide during login: To hide the profile when logging in to the ELO Administration Console, enable the *Hide during login* 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. Select *Save*.

Alternative: Click *Cancel* to discard the changes to the profile.

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* area. This area contains information about the active user and repository.

The screenshot shows the 'ELO Administration Console' header. Below it is a section titled 'Information about the current user and repository' with an 'OK' button. The information displayed is as follows:

User name	Administrator
Indexserver URL	
Indexserver version	25.
Language	English
Administration Console	25.

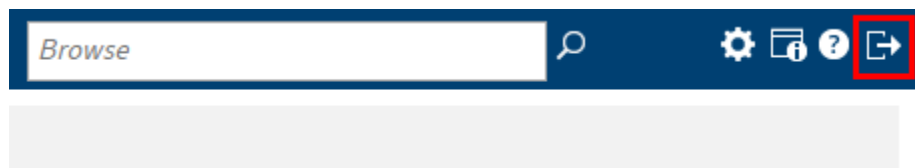
At the bottom, there is a link: > [Logout activity in the ELO Administration Console](#)

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

The Login activity in the ELO Administration Console area contains information about which users have logged on to the ELO Administration Console and at which time, as well as the corresponding session ID.

Click *OK* to leave the page and return to the ELO Administration Console home screen.

Log out



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

Simple operation

For ease of use, some areas in the ELO Administration Console can be controlled via the keyboard.

The functions are currently enabled in the following areas:

- User and group administration
- Groups (in packages)
- Translations (in packages)


You can use the following keyboard shortcuts:


Keyboard shortcut	Action	Note
TAB	Navigate forwards	


Keyboard shortcut	Action	Note
SHIFT + TAB	Navigate backwards	
ENTER/SPACE	Select element; action is started/configuration area opens	
RIGHT ARROW	Navigate right in the table columns	
LEFT ARROW	Navigate left in the table columns	
UP ARROW	Navigate up in the selected table column	
DOWN ARROW	Navigate down in the selected table column	
PAGE UP	Scroll up in the table (multiple lines)	Does not work from the table header
PAGE DOWN	Scroll down in the table (multiple lines)	Does not work from the table header
POS1/HOME	Jump to the first column in the table	Does not work from the table header
END	Jump to the last column in the table	Does not work from the table header
CTRL + POS1/ HOME	Jump to the first line in the table	Does not work from the table header
CTRL + END	Jump to the last line in the table	Does not work from the table header


ELO packages


Packages allow you to create and edit related configurations.


 Packages


**Package administration**
Create, export, import, and delete packages.

**Accounting**
Accounting metadata forms and aspects

**ELOcore**

**ELOrecruiting**

**LIBRARY**
Eine Demo Bibliotheksverwaltung als
Beispiel für den Second Generation
Space am ELO Partnertag 2023

**Metadata form**

ELO packages can contain configurations for the following areas:

- Metadata forms, aspects, and fields (gen. 2)
- Forms (gen. 2)
- Groups
- Keyword lists (gen. 2)
- Entry types (gen. 2)
- ELO Workspaces
- ELO Teamspace
- Font colors (gen. 2)
- ELO Flows
- Translations
- Parameters
- Decision rules
- AI prompts

For more information, refer to the [ELO packages](#) documentation.

Proxy

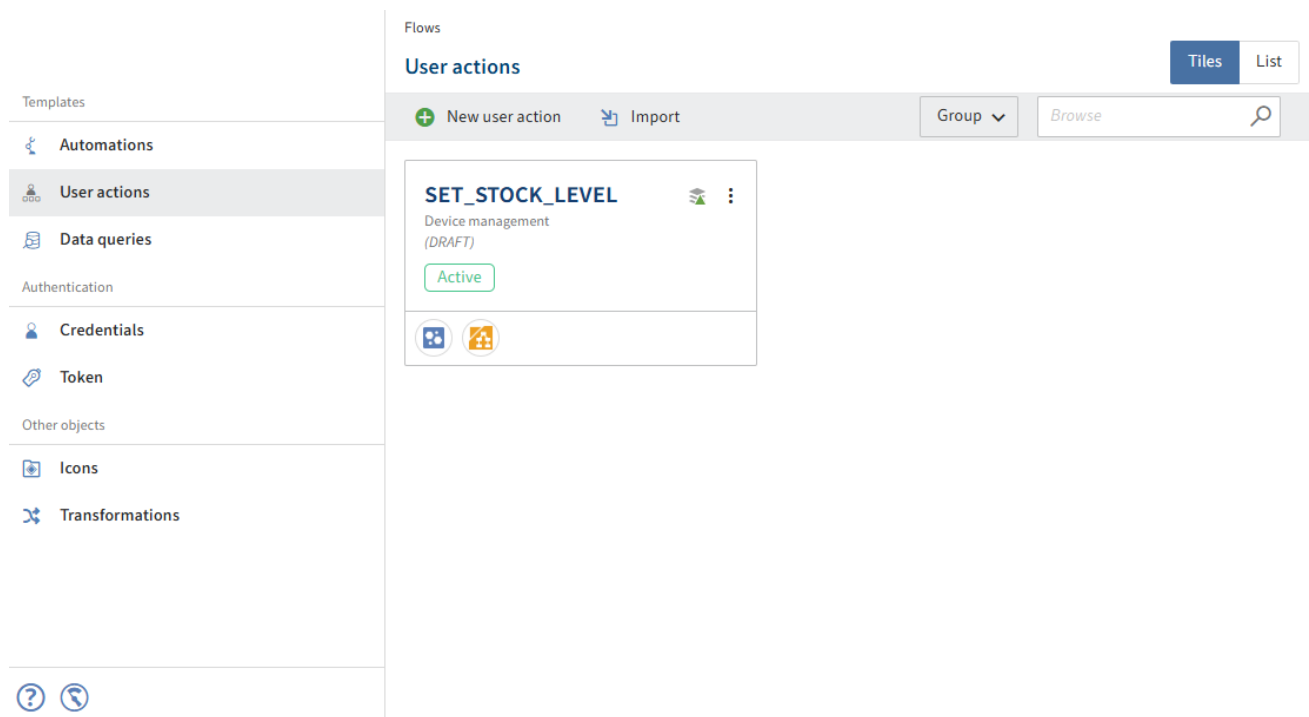
In the *Proxy* group, you can open the settings for the following menu items:

- ELO Flows administration
- ELO App Manager
- ELO form designer
- ELO Web Client configuration
- Configuration for Microsoft Azure
- ELO Sync
- E-mail administration
- Artificial intelligence
- ELO Smart Input
- ELO Smart Link for SAP® ERP

ELO Flows administration

You can create, edit, and manage flows in the *ELO Flows Administration* area.

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



You will find more information under [Processes and automations > ELO Flows](#).

ELO App Manager

The screenshot shows the ELO App Manager interface. At the top, there's a header bar with the title 'ELO App Manager' and a 'Log off' button. Below the header, there's a navigation bar with tabs: 'Apps', 'Client Info', 'Modules', 'Templates', 'Help', and 'Close all'. The 'Apps' tab is active, displaying a table of installed applications. The table has columns for 'Favo...', 'App name', 'Test', 'Vers...', 'Build', 'App status', 'Default la...', and 'Flags'. The table lists various ELO apps, including 'com.elo.ai.AIAssistant', 'com.elo.ai.ConfigSide', 'com.elo.ai.PromptEditor', 'com.elo.decisionrules...', 'com.elo.flows.ActivityUi', 'com.elo.flows.EFileVie...', 'com.elo.forms.Editor', 'com.elo.forms.Form', 'com.elo.parameters.Ed...', 'com.elo.solutions.Confi...', 'com.elo.solutions.Dmn...', 'com.elo.spaces.Config...', 'com.elo.spaces.Teams...', 'com.elo.spaces.Works...', 'com.elo.workflowexten...', 'elo.integration.Client', 'elo.teamroom.Client', 'elo.webapps.AppMana...', 'elo.webapps.Login', and 'elo.webapps.Workflow...'. Each row shows the app name, its status (e.g., 'Installed'), and its flags (e.g., 'session | noangular').

ELO App Manager

This is where you can create and manage ELO apps, module, and Client Info objects.

Learn more about the functions of the ELO App Manager in our *ELO App Manager Guide*.

In the ELO App Manager, you can manage the standard ELO apps and the ELO Business Solutions apps. In addition, you can create and edit your own apps and prepare apps and websites to be displayed in the client.

You'll find more information in the documentation under [Programming for ELO > ELO apps API guides > General information > ELO App Manager](#).

ELO form designer

Under *ELO form designer*, you can create, edit, and manage forms and templates for the form-based workflow.

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

Forms	Components for order
basic_claim	approval
freeentry	article
invoice	article_protection
multitab	articles
offline_scriptexamples	basic
order	extra
other	fruits
scriptexamples	item
test	item_protection
tst	order
	purchaser
	tab1
	tabs
	Edit form header scripts

You will find more information on how to use forms in the documentation under [Processes and automations > ELO workflow > Form workflow > The form designer](#).

You will find more information on forms (gen. 2) in the documentation under [ELO packages > Metadata > Forms \(gen. 2\)](#).

ELO Web Client configuration

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

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

CATEGORIES

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

Search

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

Requirement: 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, Client administration > ELO Web Client administration](#) documentation.

Configuration for Microsoft Azure

Information

The *Configuration for Microsoft Azure* menu item is only displayed if you have installed the module.

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



Microsoft Azure services

Sign in to Microsoft Azure

Name Admin ELO DOKU
 User name administrator@elo...com
 Tenant ID a16...44b

Sign out

Services

 New Service
  Refresh





ELOauth

Azure app ID : 85...4

✓ Registered

ELOauth

Data for registration in Microsoft Azure

 R...
  Synchr...
  Admin consent for ...
  Remove service

Azure application name *

ELOauth

Azure app ID


8993aat

Azure App-Secret

urU8Q~s

Redirect URIs

https://s...m:9093/ix-EXTEN/plugin/de.elo.ix.t

 Add URI

Zertifikat


Browse

Required permissions

Azure resource ID

Name

Roles

 Add role

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

- ELOauth
- ELO Bot for Microsoft Teams
- Business Central Azure App

For more information, refer to Configuration and administration > ELO Azure Administration.

ELO Sync

Information

The *ELO Sync* menu item is only displayed if you have installed the module.

ELO Sync is the platform for synchronization between a third-party system and ELO, such as SharePoint or OneDrive. It supports one-way and two-way synchronization.

For more information on administration and use of the module, refer to the [ELO Sync](#) documentation.

E-mail administration

In the *E-mail administration* area, you configure the delivery of e-mails by the ELO system. This function can be used to send e-mails automatically, such as using ELO Flows or notifications regarding new tasks or in connection with ELO Business Solutions.

Configuration

Interface

SMTP



SMTP settings

SMTP host

SMTP port

25

User name

Password

Security protocol

Secure connection (recommended)



Auth mechanism

PLAIN

 Save configuration

Test e-mail configuration

Multiple e-mail addresses can be entered as a comma-separated list.

Show all options

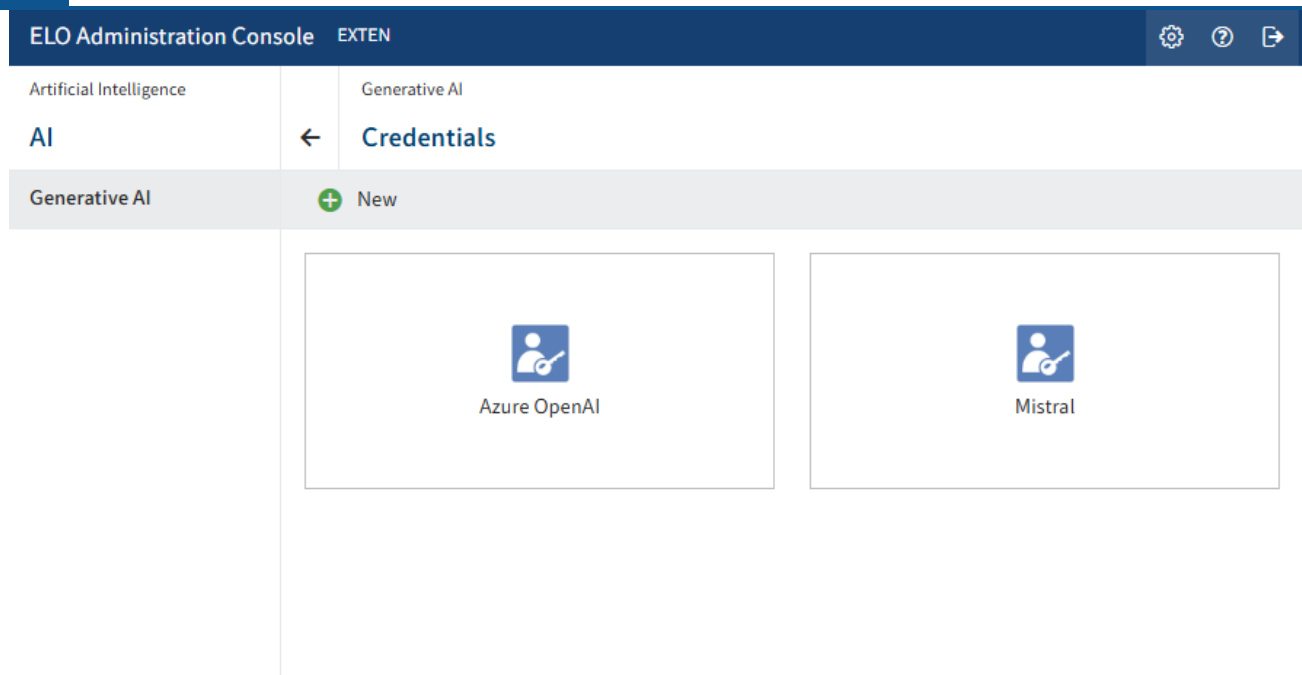


From

For more information, refer to the [ELO Indexserver > Plug-ins > E-Mail administration](#) documentation.

Artificial intelligence

In the *Artificial intelligence* area, you can configure the credentials for one or more LLM endpoints (Azure OpenAI, OpenAI, Mistral, Anthropic, self-hosted LLM) for using AI in ELO.



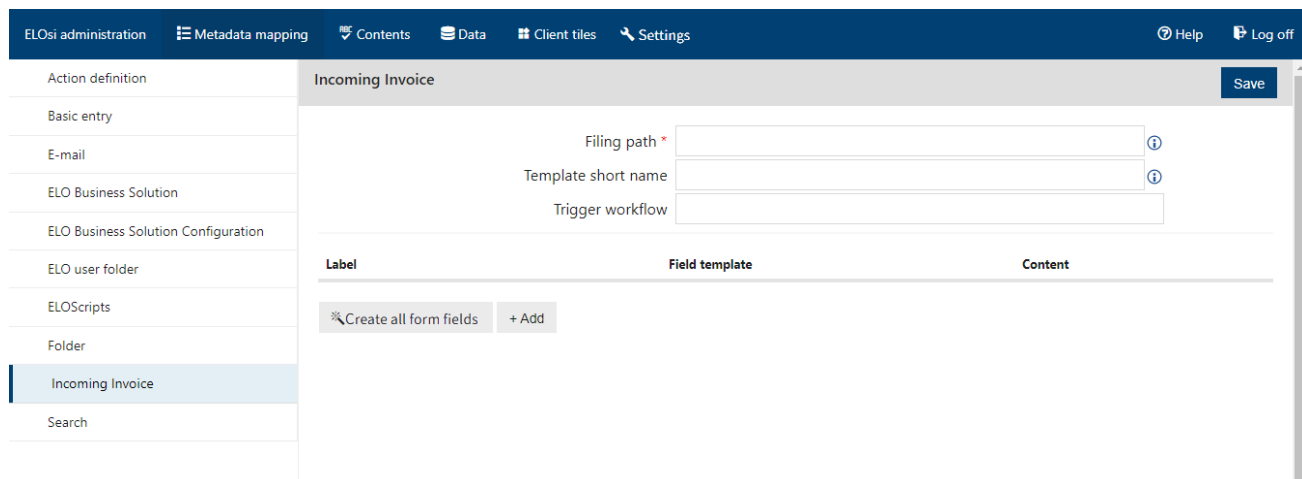
You can find more information on *AI* in the documentation [ELO packages > Solutions > AI prompts](#).

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 in to ELO Smart Input.

Information

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



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.

ELO Smart Link for SAP® ERP

In this area, you can manage and configure ELO Smart Link, the corresponding server instances, and the respective SAP systems.

For more information, refer to the documentation [ELO Suite for SAP ArchiveLink® \(SAP NetWeaver® & SAP S/4HANA®\) > ELO Smart Link for SAP® ERP configuration guide](#).

System settings

In the *System settings* group, you can open the settings for the following menu items:

- Login settings
- User and group administration
- Organizational units
- Metadata forms and fields (gen. 1)
- Field templates (gen. 1)
- Keyword lists (gen. 1)
- Entry types (gen. 1)
- Document paths
- Encryption keys
- Default document paths
- Manage URLs
- Stamps
- Repository properties
- Font colors (gen. 1)

Login settings

If you are no longer able to log in due to a misconfiguration, use the following recovery URL to log in as administrator.
[https://\[redacted\]plugin/auth2/rescue](https://[redacted]plugin/auth2/rescue)

Login Config

Enable password-based login ☒ ⓘ

Logo

⤴

Add a file with drag-and-drop or click here to select a file from the file system.

🗑

Background

⤴

Add a file with drag-and-drop or click here to select a file from the file system.

🗑

Session duration

Until client is closed ▼ ⓘ

Fixed domain

<https://example.org:1234> ⓘ

Primary identity provider

None. Let user choose. ▼ ⓘ

[Add identity provider...](#)

The sign-in will appear in a pop-up. This will not affect your current session.

[Test login](#)

ELO Modern Authentication acts as a central configuration point for all clients. It can be used for standard authentication with user name/password and for OpenID identity providers such as *Microsoft*, *Google*, *Keycloak*, etc.

On the *Authentication configuration* page, you can edit ELO Modern Authentication settings, such as the logo displayed, the available identity providers, or the type of user mapping.

You will find more information in the documentation under [ELO Indexserver > Plug-ins > ELO Modern Authentication \(Auth 2\)](#).

User and group administration

The screenshot displays the 'Users and groups' management console. On the left, a table lists system accounts and groups. The 'GRP_ADMIN' group is highlighted. On the right, the configuration page for 'GRP_ADMIN' is shown, with tabs for 'Basic settings', 'Group membership', and 'User rights'. The 'Basic settings' tab is active, showing fields for Name, Display name, E-mail address, Administrator, Supervisor, and Usage options.

ID	Name	Windows users	E-mail address
0	Administrator		administrator@elodocumentation.onmicrosoft.com
1	ELO Service		eloservice
2	GRP_ADMIN		
3	GRP_GL		
4	GRP_SEKR		
5	GRP_BUCH		
6	GRP_POST		
7	GRP_DOKU		
8	GRP_QS		
9	OPT_GRP_ADMIN		
10	OPT_GRP_STANDARD		
11	OPT_GRP_TL		
12	Andersson		andersson@elodocumentation.onmicrosoft.com
13	Byte		byte@elodocumentation.onmicrosoft.com
14	Jupiter		jupiter@elodocumentation.onmicrosoft.com
9998	Administratoren		

GRP_ADMIN Group Configuration:

- Group information:**
 - Name: GRP_ADMIN
 - Display name: EN
 - E-mail address:
 - Administrator: Administrator
 - Supervisor: GRP_ADMIN
 - Usage:
 - ☒ Visible in user lists
 - ☐ Option group
 - ☐ Substitution allowed
 - ☒ Functional role
 - ☐ Do not remove members from the group during LDAP synchronization
- Properties:**
 - Property 1:
 - Property 2:

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 in the documentation under Configuration and administration > User administration > Users and groups.

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

For more information on keyboard control, refer to Configuration and administration > ELO Administration Console > Basics > Simple operation.

Organizational units

Organizational units provide a way to classify users.

You will find more information in the documentation under Configuration and administration > User administration > Additional configurations > Organizational units.

Metadata forms and fields (gen. 1)

Metadata forms (gen. 1) for documents and folders are created and managed under *Metadata forms and fields*.

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.

You will find more information under Configuration and administration > Metadata forms and fields.

You will find information on metadata forms and aspects (gen. 2) in the documentation [ELO packages > Metadata](#).

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 Configuration and administration > Metadata forms and fields > Field templates.

You will find more information on metadata forms and aspects (gen. 2) under [ELO packages > Metadata](#).

Keyword lists (gen. 1)

The screenshot displays the 'Keyword lists (gen. 1)' configuration interface. On the left, a table lists various keyword lists, with 'LIBRARY.BOOK_TYPE' selected. On the right, the configuration for 'LIBRARY.BOOK_TYPE' is shown, including a search bar, a list of keywords (PAPERBACK, POCKETBOOK, HARDCOVER, E_BOOK), and options to merge or disable keywords.

Type	Name	Search for
	ELOSTD SWL	
	(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

Enter keyword

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 Configuration and administration > Metadata forms and fields > Keyword lists (gen. 1).

You will find more information on keyword lists in packages in the documentation [ELO packages > Metadata > Keyword lists \(gen. 2\)](#).

Entry types (gen. 1)

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

+

Add entry type

🔍

All entry types

🗑️

Delete entry type

Icon	Identifier	Name	Type	File extensions
	7Z	7Z	Document	7z
	Access	Access	Document	mdb
	Activities	Activities	Folders	
	Address	Address	Folders	
	Adobe XD	Adobe XD	Document	xd
	Audio	Audio	Document	wav,mp3,rmi
	Autocad DWF	Autocad DWF	Document	dwf
	Autocad DWG	Autocad DWG	Document	dwg
	Autocad DXF	Autocad DXF	Document	dxf
	Blue folder	Blue folder	Folders	
	Blue tab	Blue tab	Folders	
	BMP	BMP	Document	bmp
	Briefcase	Briefcase	Folders	
	Cabinet	Cabinet	Folders	

Entry type

7Z

Identifier *

7Z

Type

☒ Document
 ☐ Folder

File extensions

7z x + Enter file extension

Icon *

↑

Add an icon with drag-and-drop or click here to select an icon from the file system.

ID

291

GUID

(EA1CDD75-EDFE-A2D8-0AAC-B99C8A9CE965)

You will find more information in the documentation under [Configuration and administration > System administration > Folders and documents > Entry types \(gen. 1\)](#).

You will find more information on entry types in packages in the documentation [ELO packages > Metadata > Entry types \(gen. 2\)](#).

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.

Name		+	basis	Save	Cancel
basis			Name	basis	
elosis			Path	/opt/elo/archive/basis	
			Preview path	/opt/elo/archive/basis/preview	
			Full text path	/opt/elo/archive/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		
			<div> <i>i</i> Internal ID 1 Created on 20.08. 08:22 Default path <input checked="" type="checkbox"/> Last changed on 20.08. 08:22 </div>		

You will find more information in the documentation under [ELO server > Installation and operation > Repository and documents > Paths and URLs > Document paths](#).

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.

Name		+	ACCT	Save	Cancel
ACCT			Name	ACCT	
Exec. mgmt.			Old password		
HR			New password		
			Confirm new password		
			System user	Search for	
			Old password		
			New password		
			Confirm new password		

You will find more information in the documentation under Configuration and administration > System administration > Folders and documents > Encryption keys.

Default document paths

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

Default document paths

SaveCancel

Default document paths

basis

▼

No other default path

▼

No other default path

▼

No other default path

▼

Default filing method

☐ Parallel

☒ Sequential

Restore path

▼

You will find more information in the documentation under [ELO server > Installation and operation > Repository and documents > Paths and URLs > Default document paths](#).

Manage URLs

In the *Manage URLs* area, you can change the URL for the ELO online help as needed.

Manage URLs

SaveCancel

ELO online help URL

https://docs.elo.com/

You will find more information in the documentation under [ELO server > Installation and operation > Repository and documents > Paths and URLs > Manage URLs](#).

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

Type

Approved
Booked
Canceled
Checked
Clarification needed
Copy
Credit
Done
Forwarded
Paid
Received
Rejected
Released
Very urgent

Approved

ID:

Name:

Text:

Font: **B** **I** U **S** #00ff00

Preview:

Approved

Stamp permissions

Add user or group

Search for

User or group with permissions

Everyone RWDEP

AND group Owner rights

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

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

You will find more information in the documentation under Configuration and administration > System administration > Stamps.

Repository properties

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

Repository properties Save Cancel

Display name

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 in the documentation under Configuration and administration > System administration > General system settings > Repository properties.

Font colors (gen. 1)

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

Name	ID
System color	0
Red	1
Green	2
Blue	3
UNI.NIGHTSKY_PURPLE	4
UNI.FIRE_RED	5
ACCOUNTING.DARKRED	6

System color

Name: System color

ID: 0

☒ Enable color selection in the client

Color values

#000000

You will find more information in the documentation under Configuration and administration > System administration > General system settings > Font colors (gen. 1).

You will find information about font colors in ELO packages in the documentation [ELO packages > Other topics > Font colors \(gen. 2\)](#).

Maintenance

In the *Maintenance* group, you can open the settings for the following menu items:

- Administration mode
- Report options
- Delete report entries
- Delete and remove
- Backup tasks
- Password rules
- 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 enabled, administration mode restricts access to ELO clients. Users without main administrator rights may not log in to the repository at this time.

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

[Delete report entries](#)

Report mode

- ☐ No report
- ☐ Short report
- ☐ Extended report
- ☒ Full report

Name		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 in the documentation [ELO Java Client > 'Organize' tab > Report for entry](#).

You will find more information in the report options under [ELO server > Installation and operation > Maintenance and monitoring > Report and logs > Report options](#).

Delete report entries

Under *Delete report entries*, you can delete report entries up to a specific date.

Delete report entries

Delete

- ☒ Delete up to the following date

31/07/2025



- ☐ Delete all report entries

You will find more information in the documentation under [ELO server > Installation and operation > Maintenance and monitoring > Report and logs > Delete report entries](#).

Delete and remove

Under *Delete and remove*, you make settings for deleting and removing entries 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 with expired retention period

☒ Documents only

☐ Documents and folders

Delete entries with expired retention period

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

You will find more information in the documentation under Configuration and administration > System administration > Folders and documents > Delete and remove.

Backup tasks





Under *Backup tasks*, you define the settings for backups.

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

You will find more information in the documentation under [ELO server > Installation and operation > Repository and documents > Backup service](#).

Password rules

Under *Password rules*, you define the password security settings.

Type	Option group	
	Global	
	OPT_GRP_ADMIN	
	OPT_GRP_STANDARD	
	OPT_GRP_TL	

Global

Days valid
Min. length
☐ At least one letter
☐ At least one special character
☐ At least one uppercase and one lowercase letter
☐ At least one number

You will find more information in the documentation under Configuration and administration > User administration > Additional configurations > Password rules.

Move document files

Under *Move document files*, 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

See also
[Document paths](#)

Source path

All paths

▼

Target path

▼

Filing date range

from

to

Count

Move

You will find more information in the documentation under [ELO server > Installation and operation > Repository and documents > Paths and URLs > Move document files](#).

Server modules

In the *Server modules* group, you can open the settings for the following menu items:

- ELO Automation Services
- Backup profiles
- Create password
- 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 shows the ELO Administration Console interface. On the left, a sidebar lists modules, with 'ELOxcMoveAsync' selected. The main panel is titled 'ELOas Base' and contains the following configuration fields:

- Name:** ELOxcMoveAsync
- ID:** (2532033C-D501-33DB-4071-A5632C935739)
- Search form:** E-mail
- Index search:** DIRECT
- Search term:** ""
- Search max:** 1

Below the fields are several expandable sections:

- > Advanced search
- > Target forms for rules selection
- > Interval control
- > Includes
- > Rules

You will find more information under [Processes and automations > ELO Automation Services](#).

Backup profiles

Under *Backup profiles*, 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 in the documentation under [ELO server > Installation and operation > Repository and documents > Backup service](#).

Create password

Under *Create password*, you can create encrypted/encoded passwords for ELO.

Password

Input

Encrypted ELO password

Encrypted ELOas database password

Coded Base64 password

You will find more information in the documentation under [ELO server > Installation and operation > Repository and documents > Passwords](#).

ELO Transport

You can create transport files under the *ELO Transport* menu item. A transport file can contain information about font colors, ELO users, workflow templates, 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 'New transport file' dialog box. On the left, there is a sidebar with a 'Name' input field, a 'No data' message, and a vertical toolbar with icons for adding, deleting, and refreshing data. The main area of the dialog has a title bar 'New transport file' with 'Save' and 'Cancel' buttons. Below the title bar, there is a 'Name' input field containing the text 'New transport file'. Underneath the input field is a list of expandable categories: 'Font colors (markers)', 'Users', 'Workflow templates (wftemplate)', 'Individual keyword lists (keywords)', 'Metadata forms (masks)', and 'Folders and documents (sords)'.

You will find more information in the documentation under [ELO server > Installation and operation > Upgrade and migration > ELO Transport](#).

System information

These functions help you manage users and the system.

In the *System information* group, you can open the settings for the following menu items:

- Users in system
- Server information
- Statistics
- License report
- Test checksums

Users in system

Under *Users in system*, you will find an overview of the users currently logged in to the ELO system.

Users in system Reset filter							
No.	Users	System	Application	Version	Valid until	Ticket	
1	Byte		ELO Workflow Services	25.	14.07. 13:03	099D401A82AFA0CD...	
2	ELO Service [ELO Service]	IX			14.07. 13:03	5458FFDE63F8FDB3...	
3	Andersson		Teamspace	0.0.0	14.07. 13:02	4D360470FBF1B474...	
4	ELO Service	ELO Workflow Services	ELO Workflow Services	25.	14.07. 13:02	736990FF2B10E0A8...	
5	ELO Service		ELO Workflow Services	25.	14.07. 13:02	A16D2DF4A93320E9...	
6	Byte		ELO Web Client	25.	14.07. 13:02	3EDDF7A9F5A48D12...	
7	ELO Service		ELO Workflow Services	25.	14.07. 13:02	D958A13BE9E00C55...	
8	ELO Service [ELO Service]	IX	ELO FT Plugin	25.	14.07. 13:02	1C85C6DBD7EF46A7...	
9	ELO Service	ELO Flows-Manager	ELO Flows-Worker	25.	14.07. 13:01	B57F663F8B3E4505...	
10	Administrator		ELO Workflow Services	25.	14.07. 13:00	656C0F940D41A624...	
11	Byte		ELO Web Client	25.	14.07. 13:00	A51FB712A5AFA28F...	
12	Jupiter		Workspace	0.0.0	14.07. 13:00	37B15B440047CF3F...	

Information

User accounts for various services and modules are also shown here.

Server information

Under *Server information*, you find an overview of the server settings.

Server information

Server information	
Name	Value
Version number	25. [REDACTED]
Repository ID	
Database system	MSSQL
Server name	ELO-1

Additional Indexservers assigned to Access Manager	
Repository name	URL
Repository	http://S [REDACTED] M:9093/ix-Repository/ix
Archive	http://S [REDACTED] M:9093/ix-Archive/ix
EXTEN	http://S [REDACTED] M:9093/ix-EXTEN/ix

See also

[Statistics](#)

Statistics

Under *Statistics*, you'll find an overview of the highest IDs assigned in the repository.

Statistics

Name	Highest ID currently assigned
Entry ID	2798
Document ID	2877

License report

Under *License report*, you can access information about the respective license. Two license models are available: *Classic Licensing* and *Configured User Licensing*.

You can download a report about existing licenses for ELO Business Solutions, modules, interfaces, integrations, and courses as well as information. With *Classic Licensing*, there is also a table with information about users who have performed write actions via the ELO Java Client, ELO Web Client, and the ELO Indexserver.

License report

[Download report](#)

License information

Customer name	ELO Digital Office
GUID	R{5D8DA1F6-E4FF-344C-AEB5-50086823EB31}
License model	Classic Licensing
Valid until	31.07.2029
Product	25e
Check	Licensing was successful.
Checksum	WcVvz1Mb6HXEz+XeeR4J+zMYRXakwFOHNRvB1o+75vk=
Created on	2025-08-21 11:50

Licenses and access

Licensed clients	Number of licenses	Number of active licenses	Difference between number of licenses and number of active licenses	ELO Web Client replacement options ¹	ELO Java Client replacement options ²	Excess/shortfall of licenses ³
ELO Java Client	20	3	17		10	17
ELO Web Client	20	2	18	10	0	18
ELO Teamroom (ext. users)	20	0	20	0	0	20

You will find more information in the documentation under [ELO server > Installation and operation > Maintenance and monitoring > Information > License report](#).

Test checksums

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

Test checksums

Document IDs to check

1

1175

☒ Full report

Last document ID checked 0

Number of incorrect checksums 0

Number of correct checksums 0

Number of failed access requests 0

Check

Cancel

See also

[Server information](#)
[Statistics](#)

You will find more information in the documentation under [ELO server > Installation and operation > Maintenance and monitoring > Other topics > Test checksums](#).


Additional groups

This page provides a summary of the following groups:

- Clients
- LDAP
- Others
- ClientInfos

Clients/ELO app (Android and iOS)

In the *ELO app (Android and iOS)* menu item, 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 app (Android and iOS)
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"/> Intraday (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
Everyone (global)	<input type="checkbox"/> Create folder

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 this 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.

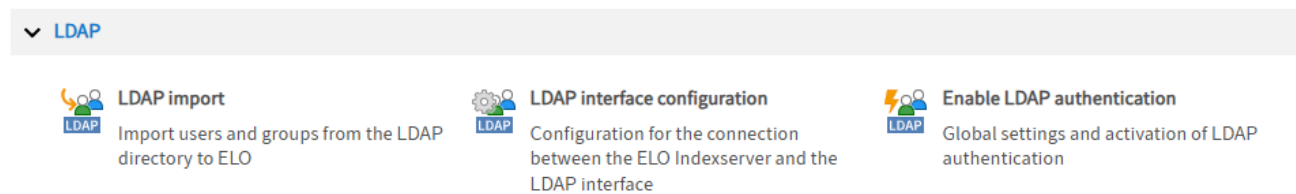
Set by: In the *Set by* column, you can see whether a setting has been assigned to an individual user or through an option group.

For more information, refer to the [ELO mobile apps](#) documentation.

LDAP

In the *LDAP* group, you can open the settings for the following menu items:

- LDAP import
- LDAP interface configuration
- Enable LDAP authentication



You will find more information in the documentation under Configuration and administration > User administration > LDAP.

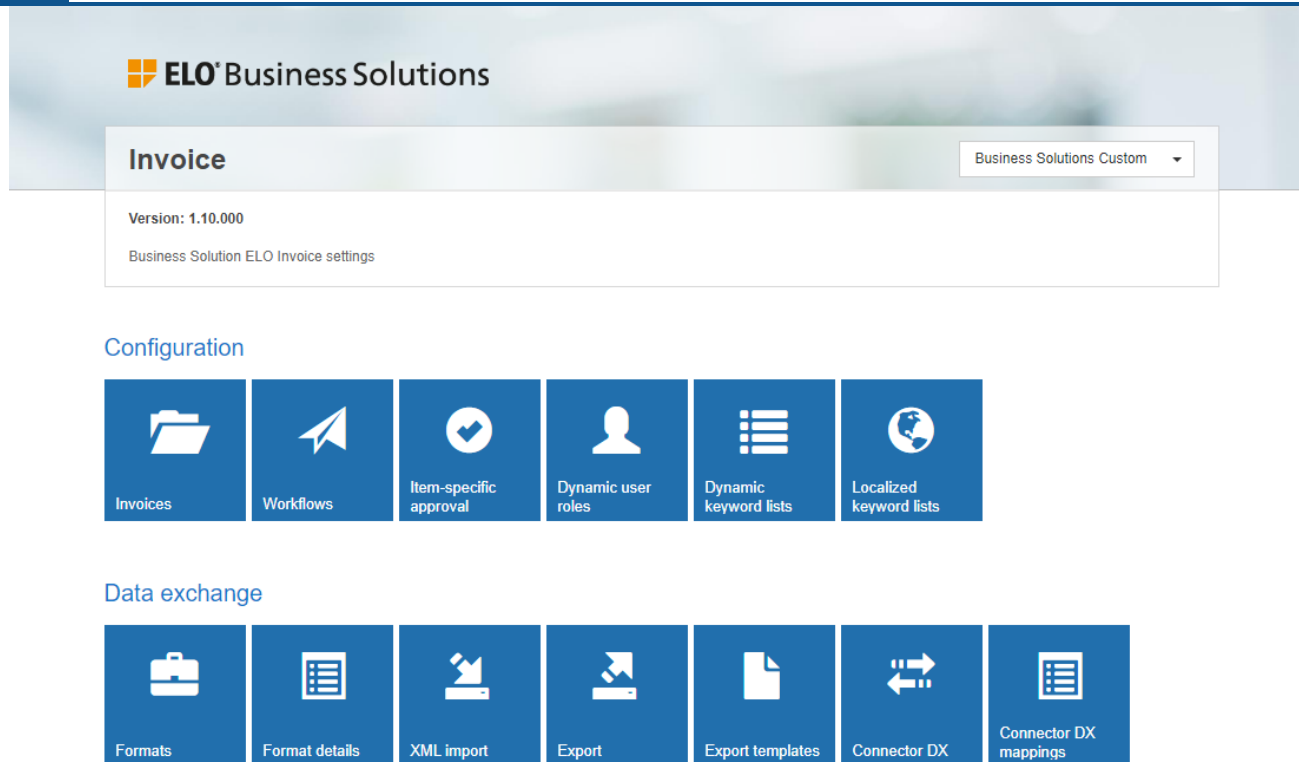
Others/Block access

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

You will find more information in the documentation under Configuration and administration > User administration > Additional configurations > Block access.

ClientInfos

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



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.

You will find the documentation and additional information at the following links:

- [ELO Business Solutions on ELO Docs](#)
- [ELO Business Solutions on the ELO SupportWeb](#)