Configuration and administration

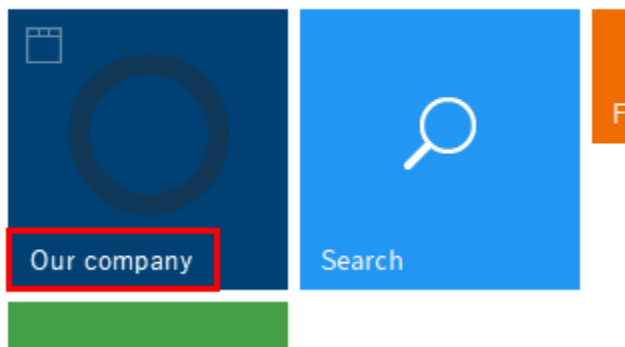# Table of contents

General system settings

Repository properties

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.

> **Information**
>
> Changes to the display name do not take effect until you restart the client.

With the default settings, the name of the repository that was assigned in the setup is used.

> **Please note**
>
> The repository ID (previously: repository name) is not set via the *Display name*. These settings are made in the *ELO Replication* module.

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.
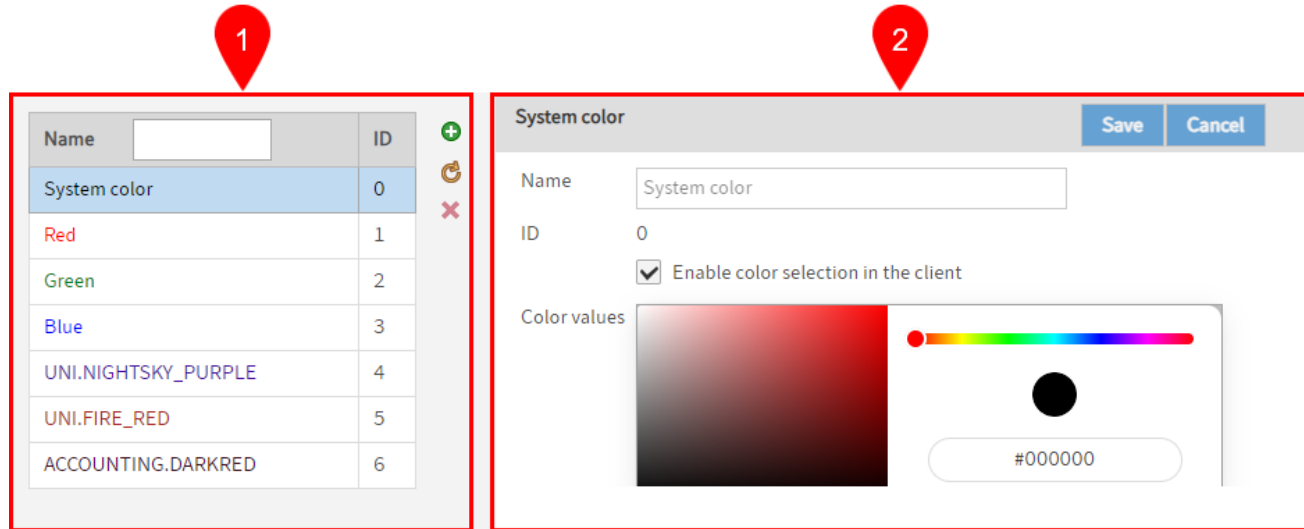
The *Font colors* area contains the following sections:

- 1 List of colors
- 2 Color settings

These are explained below.

1 List of colors

The *List of colors* area contains all the font colors that are available for the corresponding repository. Select a color to view or edit the corresponding settings.

Search for: You can search the list using the *Search for* field.

Add (green plus icon): Select the *Add* button to create a new font color.

Reload data from server (yellow circle arrow icon): Select the *Reload data from server* button to reload the *List of colors* area.

2 Color settings

In the *Color settings* area, you can edit the settings of the selected font color.

Name: You can edit the name of the font color in the *Name* field.

ID: The ID is assigned automatically by ELO.

Color values: The *Color values* area contains different options for editing the color.

-

a) manual selection using the color field and color slider

- b) exact selection using hexadecimal values

Folders and documents

Entry types

Entry types indicate what type of entry you are dealing with at a glance. The icons that are used can be customized.

In this area, you manage the entry types outside of packages. The ELO Server Setup provides a default set of entry types.

The following actions are available in the *Entry types* area:

1 Add entry type

2 Search entry type

3 Filter entry types

4 Delete entry types

5 Configure entry types

Add entry type

To add an entry type, follow the steps below.

1. Select *Add entry type*.

2. Enter a technical name in the *Identifier* field.

3.

Under *Type*, select the purpose (document or folder) of the entry type.

Optional: For the *Document* type, enter one or more extensions linked to the entry type. If a document with an appropriate extension is filed, the respective entry type is then assigned automatically.

1. Upload an icon for the entry type.

- Allowed file formats:
    ◦ SVG
    ◦ ICO

1. Select *Save entry type*.

The entry type is created and can be used.

Top level in the repository

You can configure a custom icon for the root element in the repository (also referred to as *top level*).

You will find the settings under the *Repository* entry type.

The ID for this entry type is set to the value 9999.

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.

> **Please note**
>
> The Key *function* is no longer used. For compatibility reasons with earlier versions, there can still be keys in the repository but you will no longer be able to view them in the ELO Administration Console. You now control access to documents with permissions and encryption keys.

Add encryption key (green plus icon): Select *Add encryption key* to add a new encryption key.

Reload data from server (yellow circle arrow icon): Select *Reload data from server* to refresh the list of encryption keys.

Print information for encryption keys (printer icon): Select *Print information for encryption keys* to print an overview of the encryption keys.

Name: Each encryption key can be assigned a name.

Old password: If you want to change the password of the encryption key, you need to enter the previous password in the *Old password* field.

New password: Enter the new password for the encryption key here.

Confirm new password: Confirm the new password for the encryption key.

System user: If a service account (e.g. *ELO Service*) needs access to an encryption key, enter the option group that the corresponding service account is a member of in the *System user* field.

Old password: If you want to change the password of the service account, you need to enter the previous password in the *Old password* field.

New password: Enter the new password for the service account here.

Confirm new password: Confirm the new password for the service account.

Information on encryption keys

Warning

A document's encrypted status cannot be reversed! Once a document has been assigned an encryption key, it is protected by a password and an encryption algorithm.

Documents with encryption keys

- are encrypted using a proprietary algorithm and can only be viewed with the ELO Viewer.
- can only be viewed at the system level using the ELO Viewer.
- remain encrypted. The encryption process is irreversible.

Delete and remove

The *Delete* function does not delete entries in ELO directly. They are hidden and marked for deletion. They can be restored until the point at which they are permanently deleted.

In the *Delete and remove* area, you can permanently remove entries with a deletion marker and mark entries whose retention period has expired with a deletion marker.

Delete permanently

In the *Delete permanently* area, you can permanently delete entries, document versions, and file attachments that are marked for deletion (*Delete* function) from ELO and the database.

> **Warning**
>
> These entries cannot be restored!

Remove deleted entries: To permanently remove all deleted folders and documents from ELO, enable the *Remove deleted entries* check box.

Remove deleted document versions and attachment versions: To permanently remove all deleted document versions and file attachments, enable the *Remove deleted document versions and attachment versions* check box.

Deletion date until: In the *Deletion date until* field, you specify up to which date the objects should be deleted. The date on which the objects were deleted counts.

Delete permanently: Select *Delete permanently* to start the deletion process with the selected settings.

Information

To check which entries were deleted in the ELO Java Client, use the function *Report for entry* (ribbon > Organize > Properties) for the root element.

Action name	Comment
Folder displayed	JPG
Folder displayed	Solutions
Search executed	Search executed
Indexserver: Log off	Flows-Deployment-Provide
Folder displayed	CustomComponents
Indexserver: Log on	Flows-Deployment-Provide
Search executed	Search executed
Search executed	Search executed

You can filter the report down to the desired delete actions via the report options.

Alternative: You can also track delete actions via the ELO Indexserver log file.

## Delete entries whose retention period has expired

In the *Delete entries with expired retention period* area, you can mark entries that have been assigned a lifetime or a retention period with a deletion marker. Specify whether you want to delete *Documents only* or *Documents and folders*.

Select *Delete entries with expired retention period* to start the deletion process with the selected settings. After the entries have been marked with a deletion marker, they can be removed permanently with the *Remove permanently* function (see above).

Stamps

'Stamps' area

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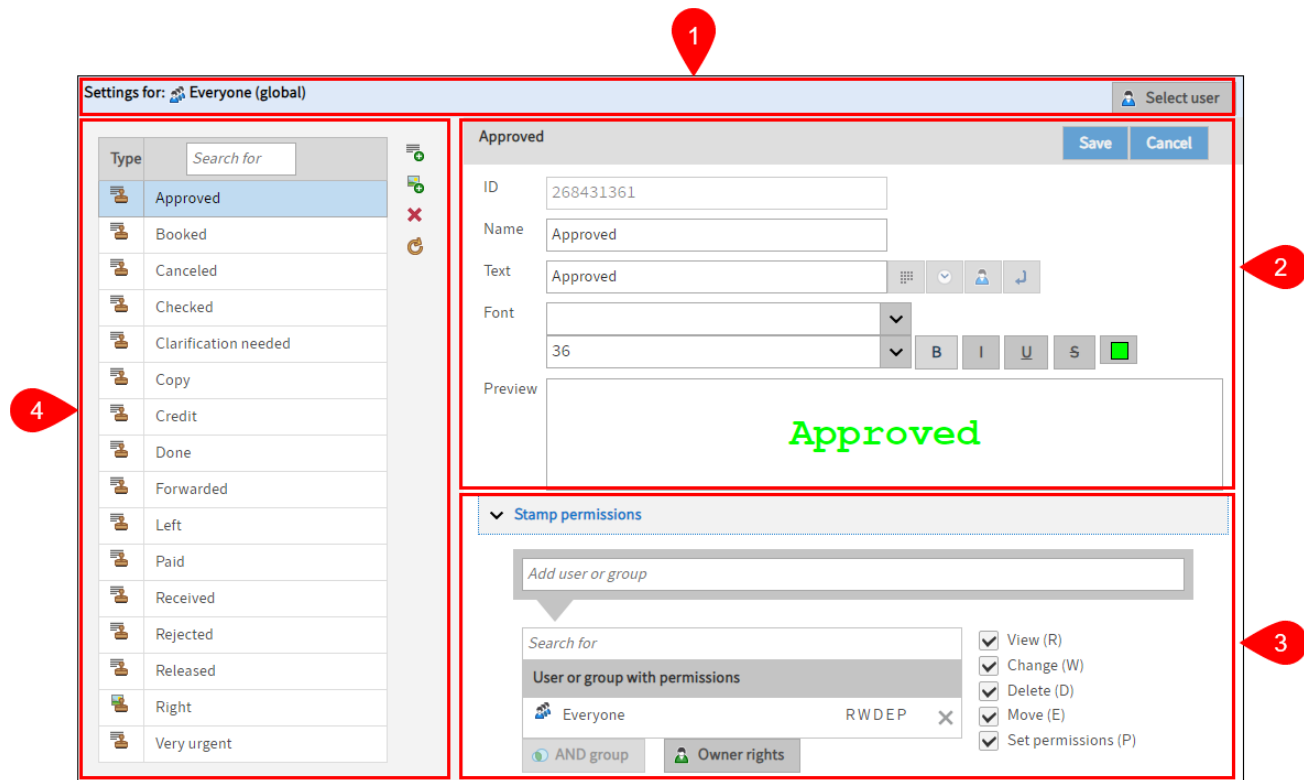
The stamps are available to users in the viewer pane in the ELO Java Client.

The *Stamps* area contains the following sections:

1 Settings for: In *Settings for*, you can see who you are editing the stamp settings for. You can find more information under Settings for.

2 Stamp settings: Under *Stamp settings*, you see the settings of the selected stamp. The stamp settings are edited in these fields. You can find more information in the following chapters:

- Add a text stamp
- Add an image stamp

3 Stamp permissions: In the *Stamp permissions* area, you can edit the permissions settings that will apply if the stamp is used. You can find more information under Stamp permissions.

4 List of stamps: Under *List of stamps*, you see all the stamps available to the selected user/option group, as well as the buttons for creating and deleting stamps. You can find more information under List of stamps.

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 stamp settings for.

> **Please note**
>
> Stamps created in the client are only available to the respective user.
>
> To edit the stamp settings for all users (global), select the *Everyone* group in the ELO Administration Console.

Stamp permissions

> **Please note**
>
> The configured permissions only apply to the applied stamp in the ELO system. Permissions do not control which users may use the respective stamp.

Add user or group: In the *Add user or group* field, you can add users or groups to the list *User or group with permissions*.

Search for: You can search the list *User or group with permissions* using the *Search for* field.

User or group with permissions: In the list *User or group with permissions*, you can see the permissions that users and groups have when using the stamp.

The following permissions are available:

- View (R): The user/group can see the applied stamp.
- Change (W): The user/group can change the size of the stamp.
- Delete (D): The user/group can delete the stamp.
- Move (E): The user/group can move the stamp around within the document.
- Set permissions (P): The user/group can change the permissions on the stamp. The user/group also requires the user right *Edit permissions*. AND group: Select the *AND group* button to connect two or more groups. In this case, the assigned permissions only apply to users who are members of all connected groups. An AND group contains the overlap from the selected groups.

For more information on AND groups, refer to the *User administration* documentation in User administration > Concept for assigning rights and permissions > AND groups.

Owner rights: Select the *Owner rights* button to grant permissions to the user who created the stamp.

Members of the group: Under *Members of the group*, you can see all users who are a member of the selected group.

List of stamps
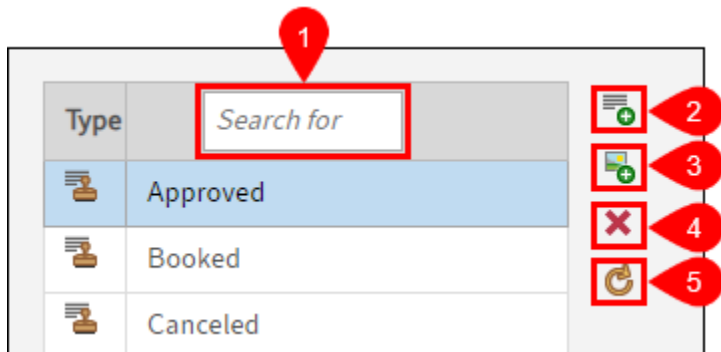
The following actions are possible:

1 Search for: You can search the list using the *Search for* field.

2 Add a text stamp (green plus icon combined with text icon): Select *Add a text stamp* to create a new text stamp. You can find more information in the chapter Add a text stamp.

3 Add an image stamp (green plus icon combined with image icon): Select *Add an image stamp* to create a new image stamp. You can find more information in the chapter Add an image stamp.

4 Delete (red X icon): Select the *Delete* button to delete the selected stamp.

5 Reload data from server (yellow circle arrow icon): Select the *Reload data from server* button to reload the *List of stamps* area.

Add a text stamp

1. Select *Add a text stamp*.

The *New stamp* area opens.

2. Enter a name for the new text stamp in the *Name* field.

3. Enter the text in the *Text* input field that will appear as stamped text on the document.

A preview of the stamp will appear in the *Preview* field. The preview is refreshed automatically every time you make a change.

Please note

New stamps can also be created in the ELO Java Client. These stamps, however, are only available to the respective user.

Optional 1: Add placeholders if required.

- ○ Date: Select the *Date* button to insert a placeholder for the current date (%x) at the selected position.

- ○ Time: Select the *Time* button to insert a placeholder for the current time (%X) at the selected position.

- ○ User: Select the *User* button to insert a placeholder for the user who created the stamp (%u) at the selected position.

- ○ Line break: Select the *Line break* button to insert a placeholder for a line break (<br/>) at the selected position.

Name	Locked from
Text	Locked from %X %X \nby: %u
Font	Verdanai
	36 B I U S ■
Preview	Locked from 5:44:37 AM 5:44:37 AM by: Name

Optional 2: In the *Font* area, you can change the settings for the font type, font size, font color, and stamp format.
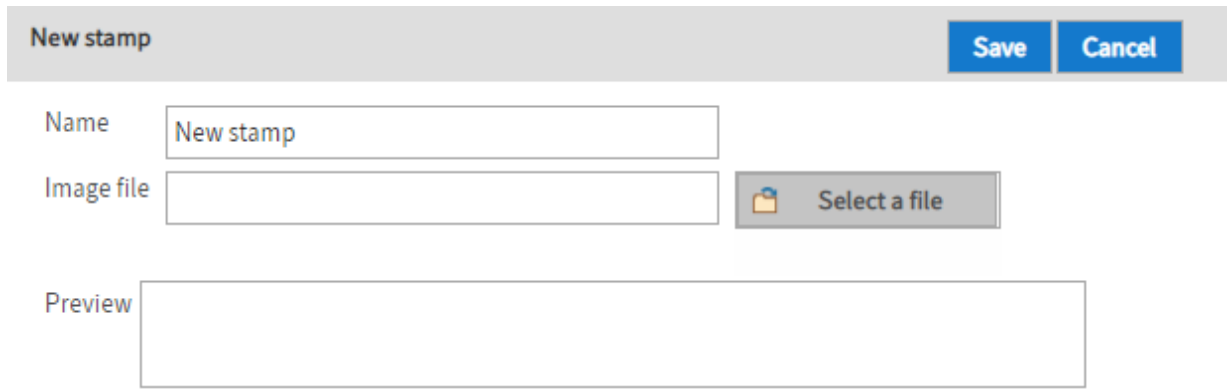
Optional 3: You can edit the permissions for the stamp in the *Stamp permissions* area.

4. Once you have made all settings, select *Save*.

The new stamp is shown in the overview of available stamps on the left-hand side.

Add an image stamp

1. Select *Add an image stamp*.

The *New stamp* area opens.

2. Enter a name for the new image stamp in the *Name* field.
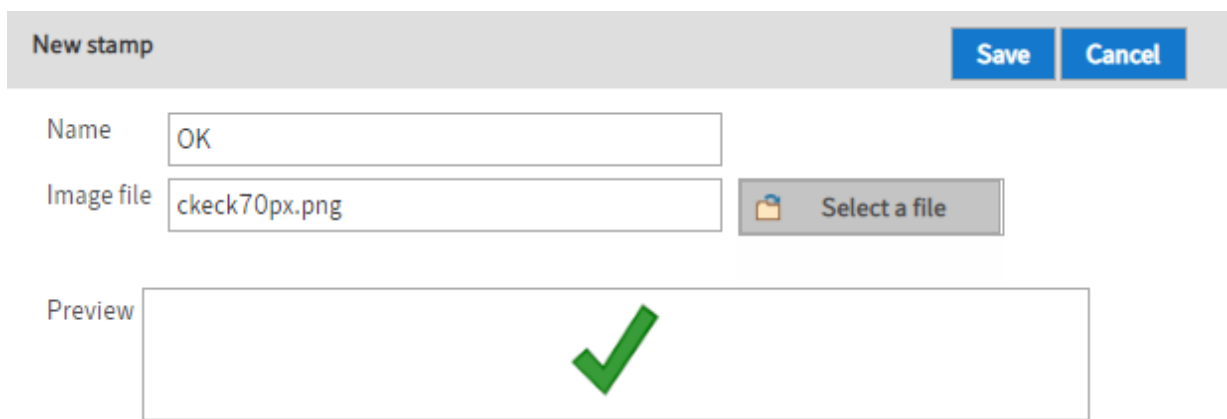
3. Select *Select file*.

The Windows dialog box for selecting a file from the system appears.

4. Select the desired image file.

Information

The file formats PNG, JPG, GIF, and BMP are allowed.

The maximum file size is 1000 KB.

The selected image appears in the *Preview* field.

Optional: You can edit the permissions for the stamp in the *Stamp permissions* area.

5. Once you have made all settings, select *Save*.

The new stamp is shown in the overview of available stamps on the left-hand side.