ELO packages

ELO Spaces

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ELO Workspaces

Introduction

Workspaces are designed to provide different visualization and filter options for different audiences. Data is stored in a flat workspace hierarchy and processed as needed.

To be able to create workspaces, first you have to create a package with metadata forms and aspects. Packages are intended to bundle entire scenarios and facilitate forwarding.

You create the actual workspaces in the client. You will need workspace types, which you create beforehand in the corresponding package in the *Workspace types* area of the ELO Administration Console.

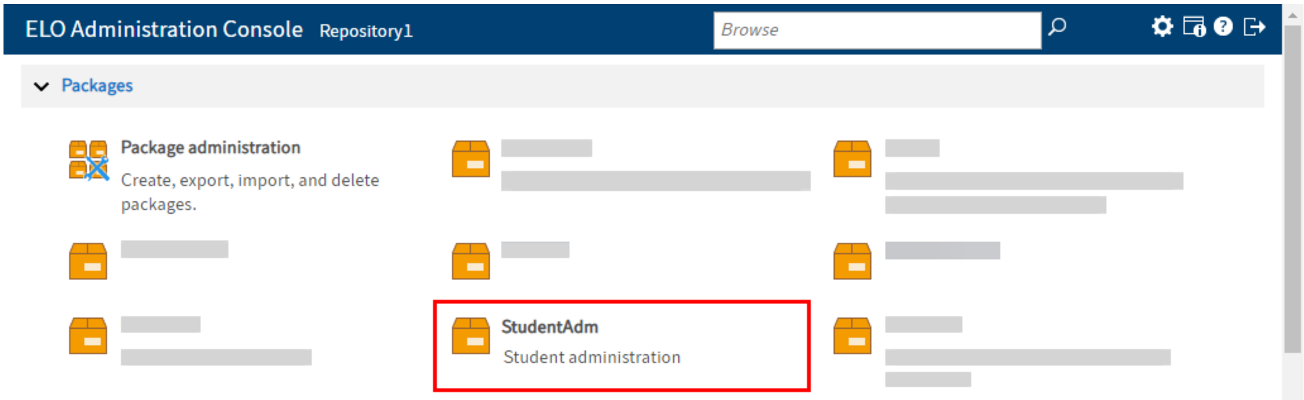
Refer to the following sections for more information:

- Create workspace type
- Configure workspace type

The following documentation is available for users:

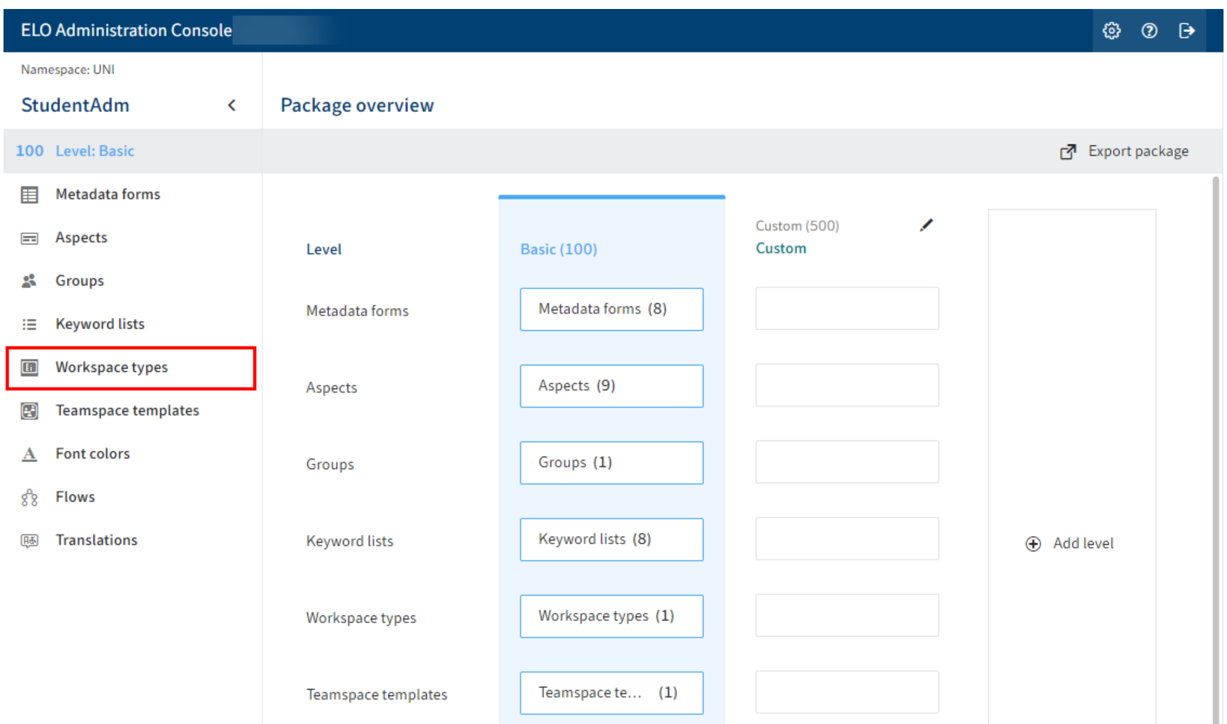
- Workspaces in the ELO Web Client
- Workspaces in the ELO Java Client

Create workspace type



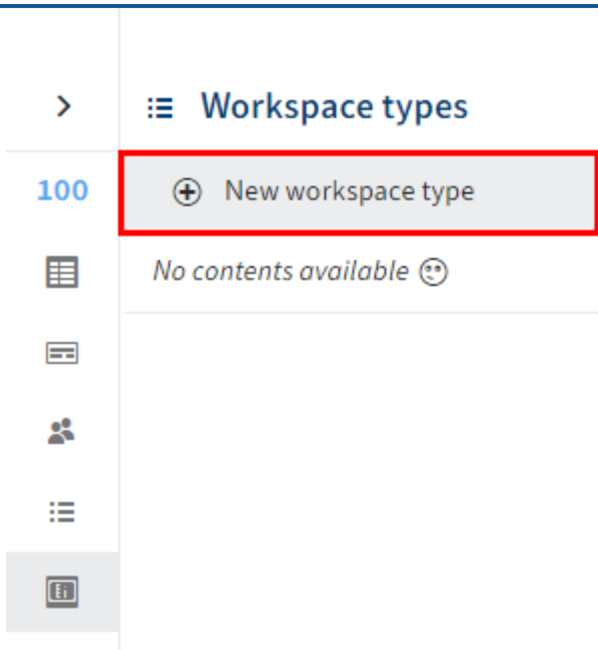
1. In the menu area of the ELO Administration Console, select the package where you would like to create the workspace type.

   The package opens.



2. Select *Workspace types*.

   The *Workspace types* dialog box appears.



3. Select *New workspace type*.

   The Configuration area for the new workspace type opens.

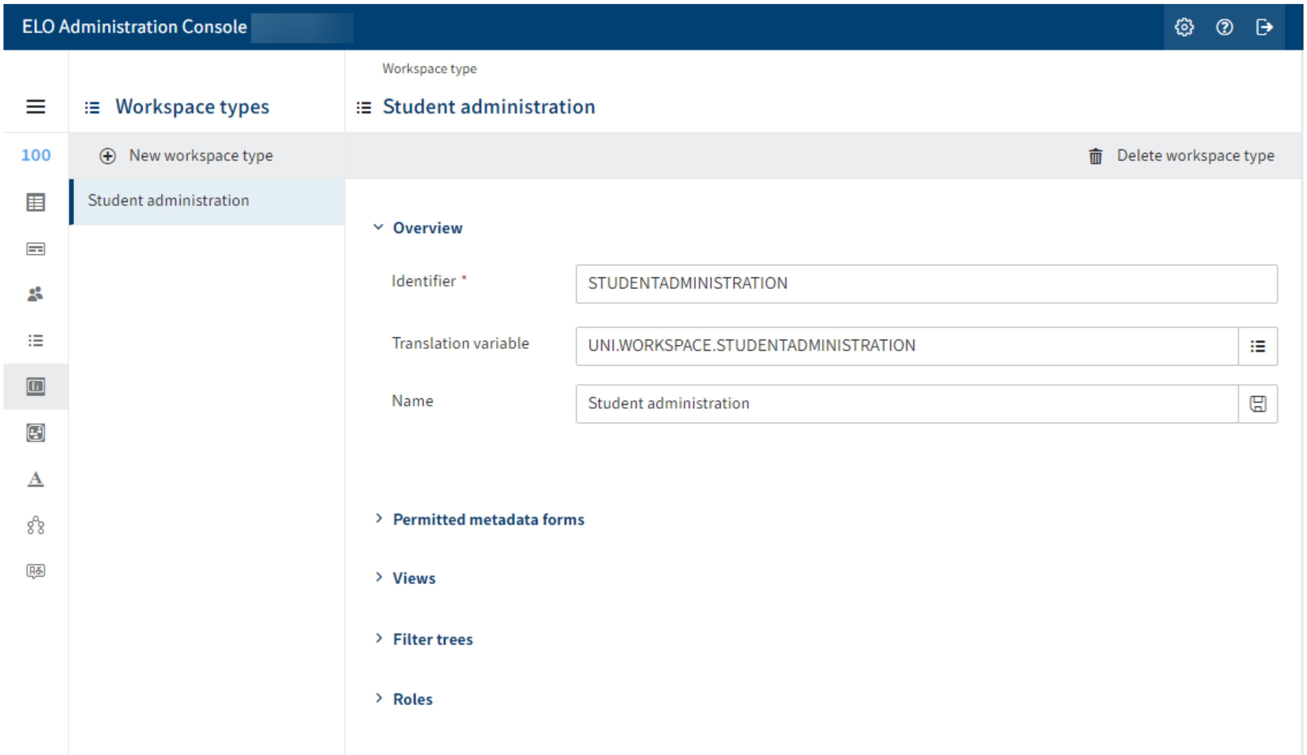
   > **Information**
   >
   > If you select an existing workspace type, you can also configure it in the *Workspace type* dialog box.

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

   A new workspace type is created.

Configure workspace type

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



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

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

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

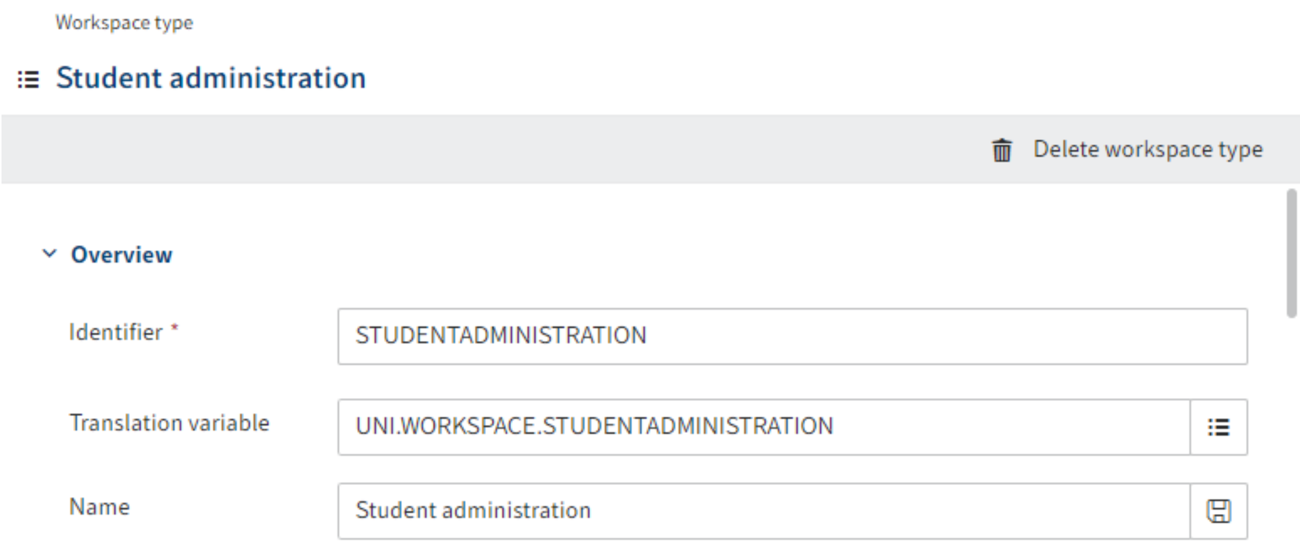
> **Please note**

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

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

Enter basic data for the workspace type

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



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

   Information

   Only capital letters (without umlauts and special characters), numbers, and underscores are allowed. The first character must be a letter.

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

   Information

   Only letters (without umlauts and special characters), numbers, periods, and underscores are allowed. The first character must be a letter.

3. Enter the display name for the translation variable into the *Name* field.

4. Select *Save* (floppy disk icon).

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

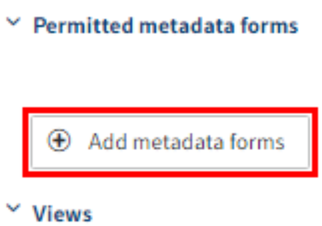
The content of the *Name* field will be saved as the display name for the translation variable. Here, the currently selected display language applies.

5. Select *Save workspace type*.

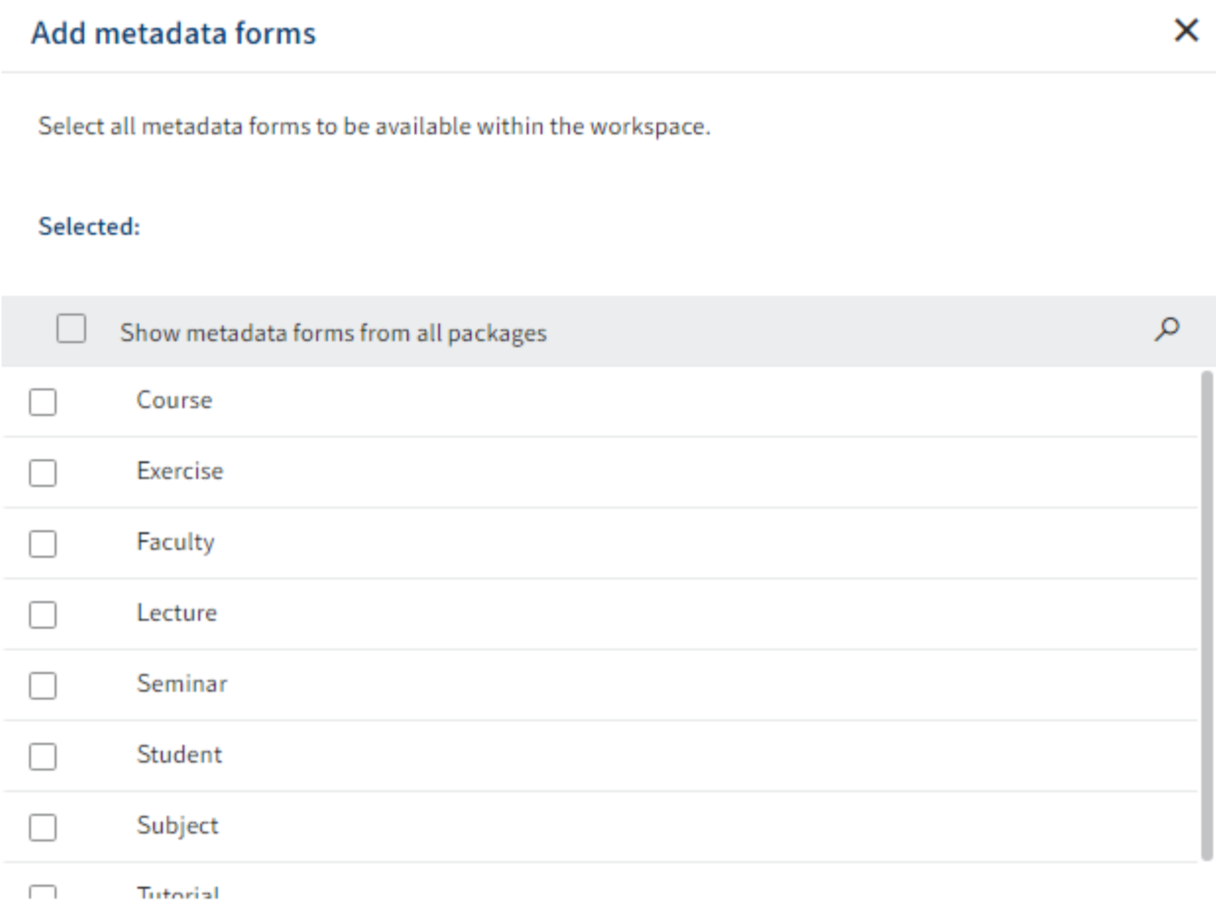
   The workspace type is saved.

Define permitted metadata forms

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



1. Select *Add metadata forms*.



   The *Add metadata forms* dialog box appears.

2.

Select the metadata forms to make available in the workspace.

3. Select *Apply*.

   The metadata forms will be added to the workspace type.

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

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

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

4. Select *Save workspace type*.

   The workspace type is saved.

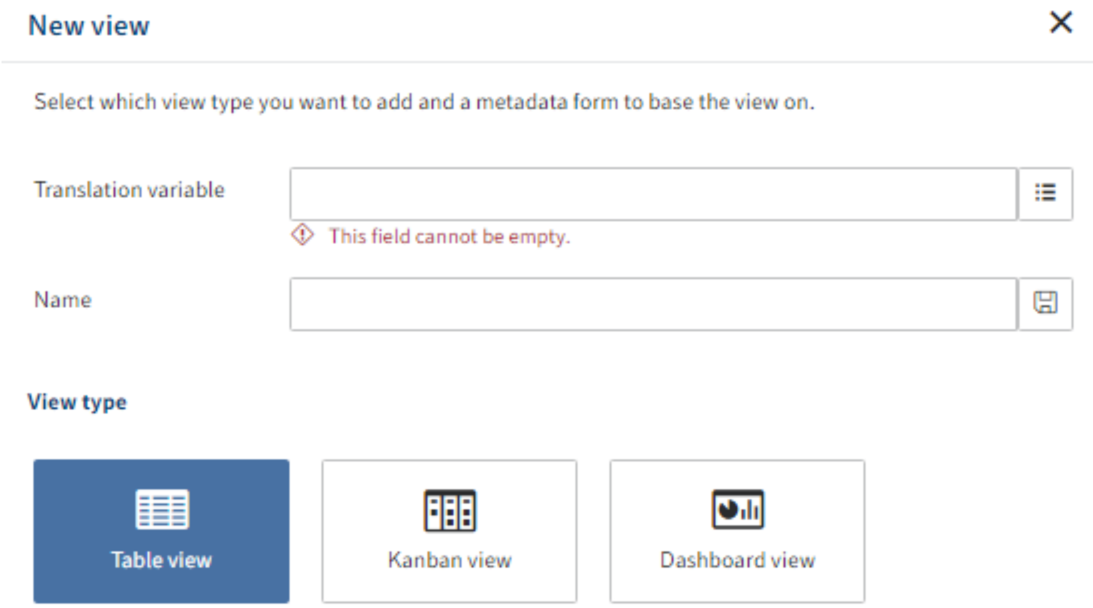
Create views

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

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

Create view

1. Select *New view*.



The *New view* dialog box opens.

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

> **Information**
>
> Only letters (without umlauts and special characters), numbers, periods, and underscores are allowed. The first character must be a letter.

3. Enter the display name for the translation variable into the *Name* field.

4. Select *Save* (floppy disk icon).

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

   The display name for the translation variable is automatically applied to the *Name* field.

5. Select a view type.

   The following choices are available:

   - Table view: The workspace type data is displayed as a table. You can adjust the table columns in a later step.
   - Kanban view: The workspace type data is displayed as a kanban board. A kanban board is divided into multiple columns which represent the steps of a process. A workspace element can pass through the various stages of a process. The elements are displayed as tiles or cards which can be dragged to different columns on the board. Only fields with a keyword list can be used in the kanban view.
   - Dashboard view: The data of a metadata form in the workspace can be displayed in a dashboard. Dashboards serve to display various static values in charts. At least one

dashboard must be set up for the metadata form. For information on how to configure dashboards for a metadata form, refer to Metadata > Metadata forms > Configure metadata forms > Create dashboards.

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

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

7. Select *Apply*.

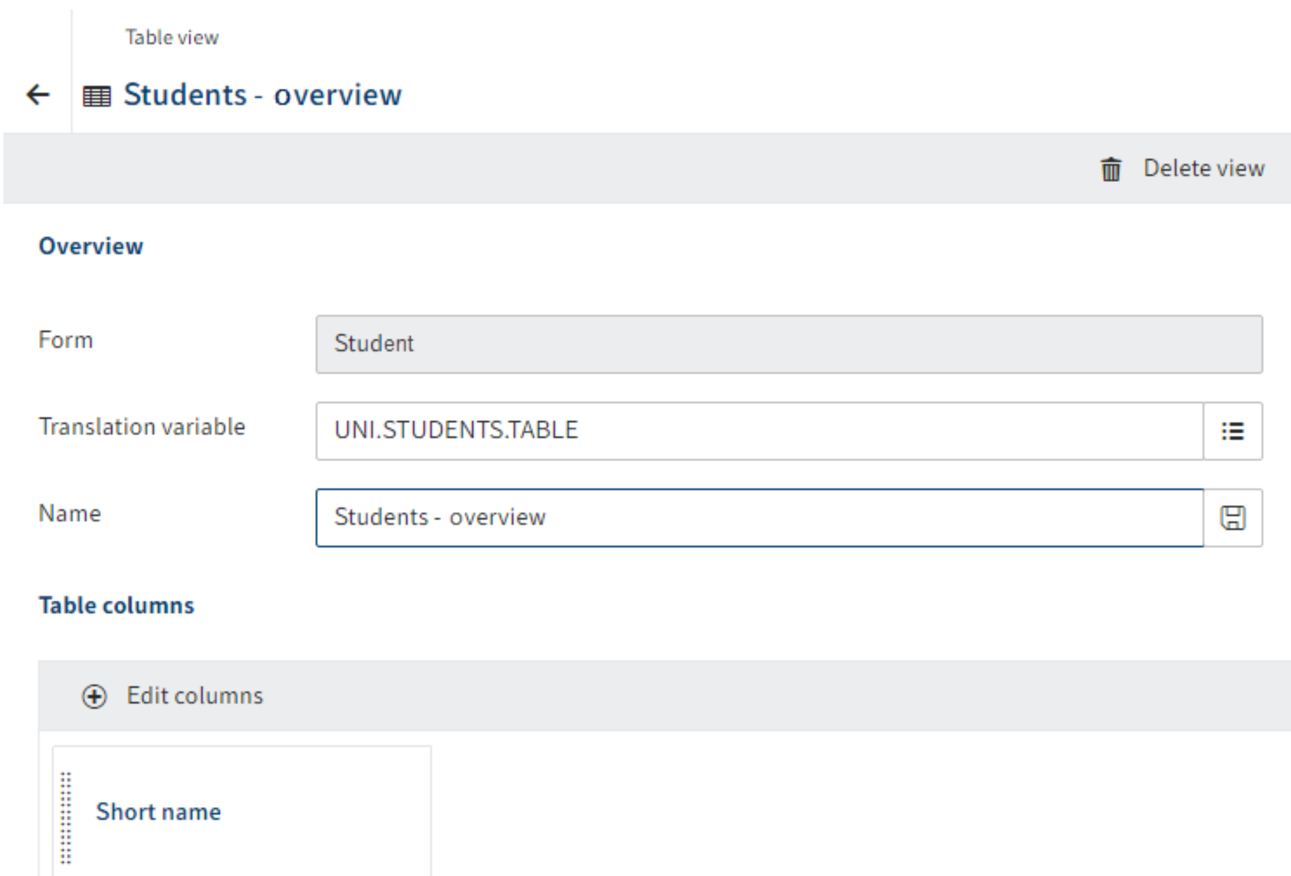
   Depending on the option selected, an associated dialog box may open. Refer to the following sections for more information on the different dialog boxes:

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

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

   The workspace type is saved.

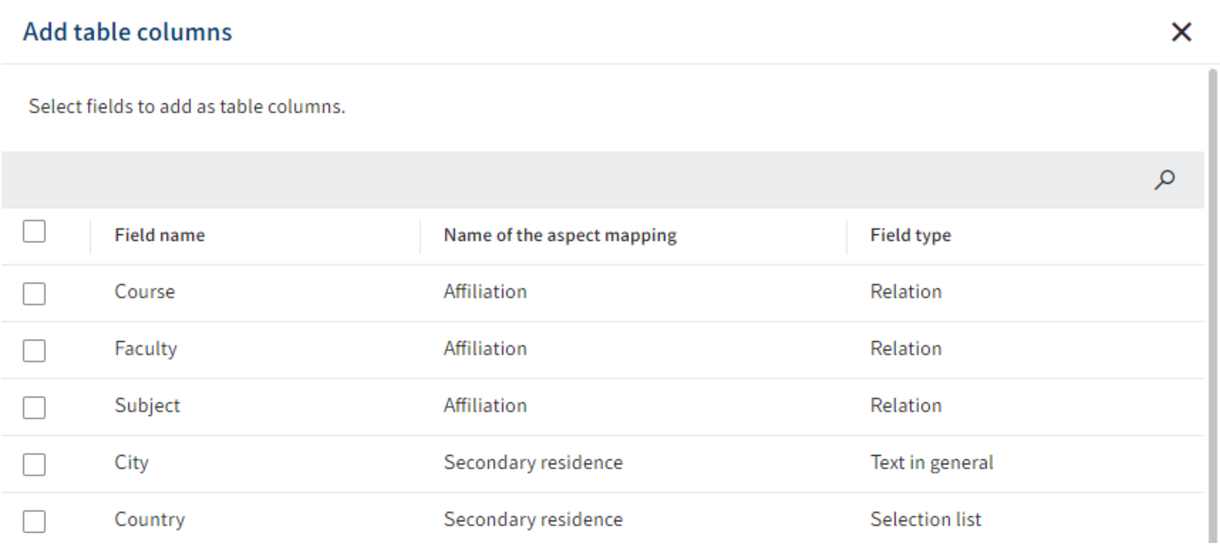
'Table view' dialog box



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

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

1. Select *Edit columns*.



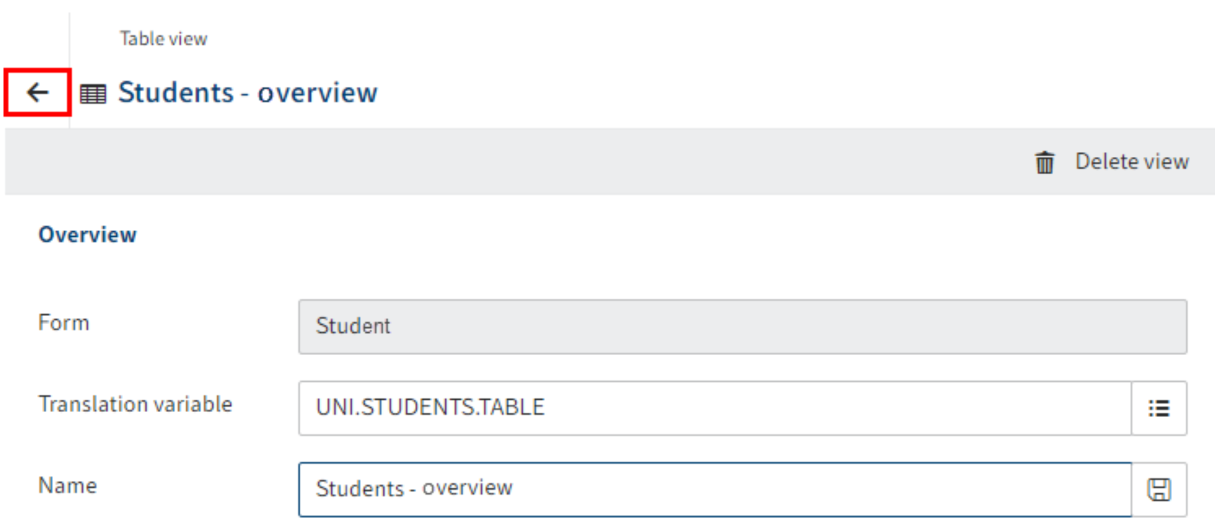
   The *Add table columns* dialog box appears.

2. Select the fields to display as columns.

3. Select *Apply*.

   The columns are added to the view.

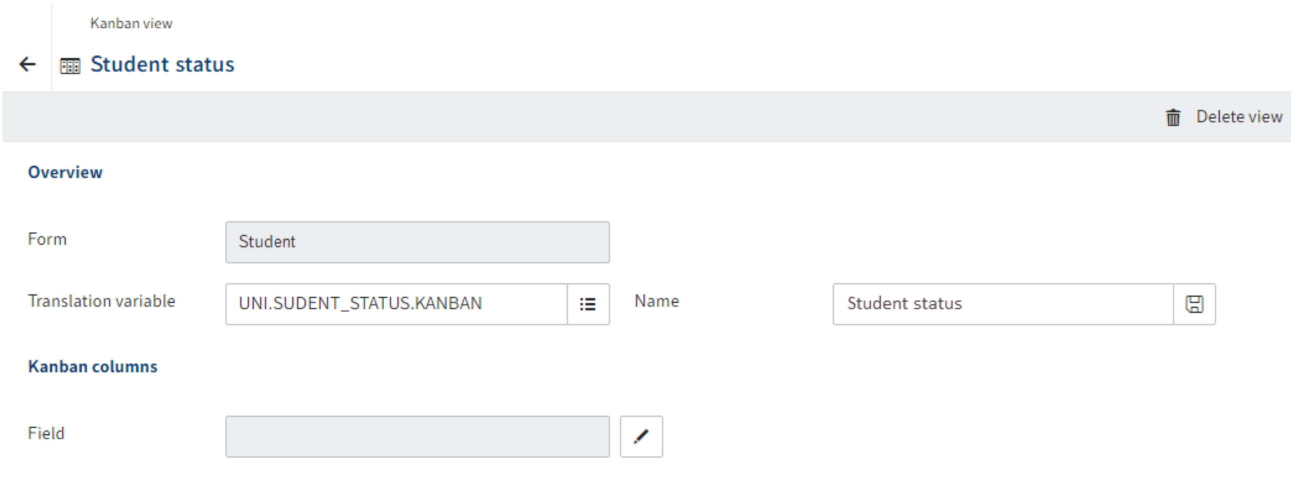
   Optional: Move the table columns via drag-and-drop.



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

   The view is saved.

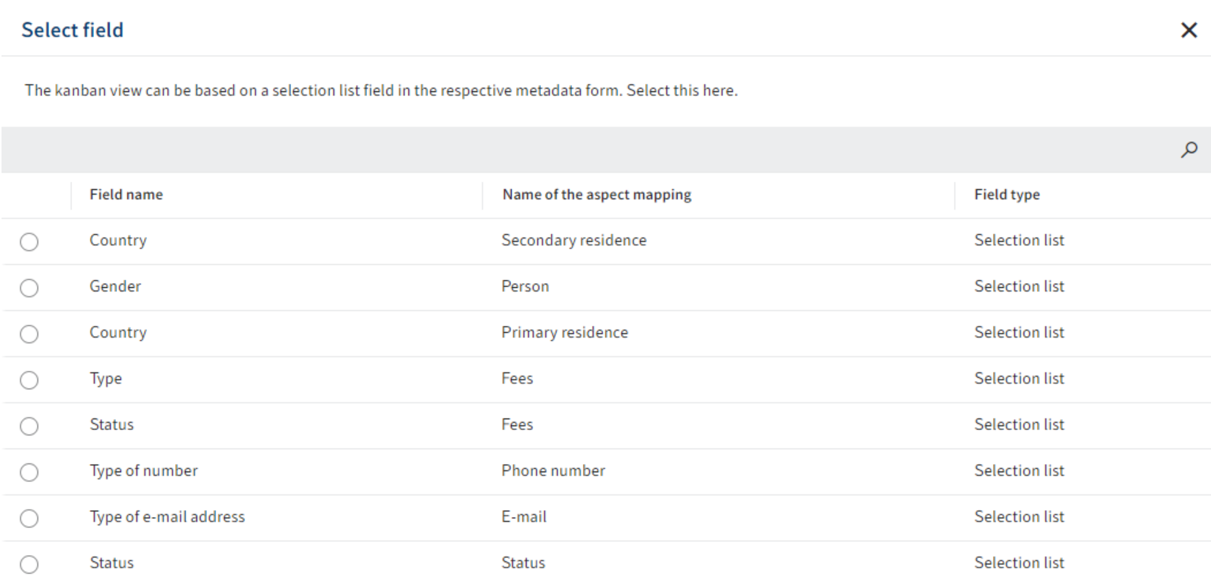
'Kanban view' dialog box



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

> **Please note**
>
> The *Field* field must not be empty. Only fields with a keyword list can be used in the kanban view.
>
> Create keyword lists via the *Keyword lists* menu item in the package. You will find more information under ELO packages > Metadata > Keyword lists.

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



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

2. Select a field.

3.

Select *Apply*.

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

4. Select *Edit kanban columns*.

The *Edit kanban columns* dialog box opens.

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

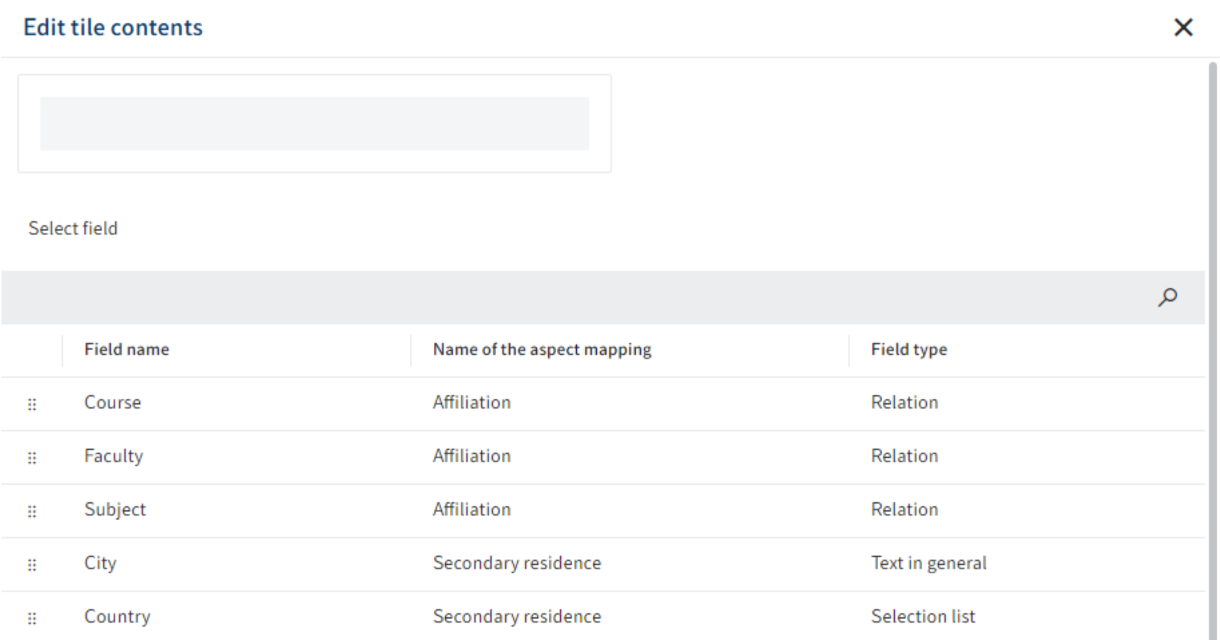
Alternative: To select all elements in the list, enable the check box next to the *Field name* column.

6. Select *Apply*.

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

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

7. Select *Edit tile contents*.



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

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

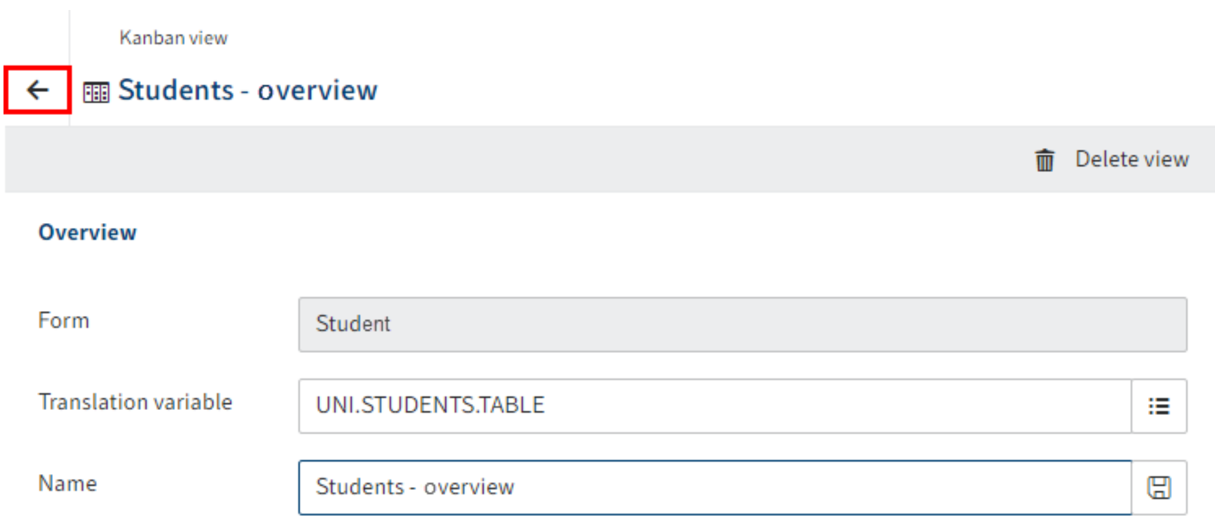
   The fields selected here will be displayed as information on the tiles.

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

   Option 2: Repeat step 8 for additional fields.

9. Select *Apply*.

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

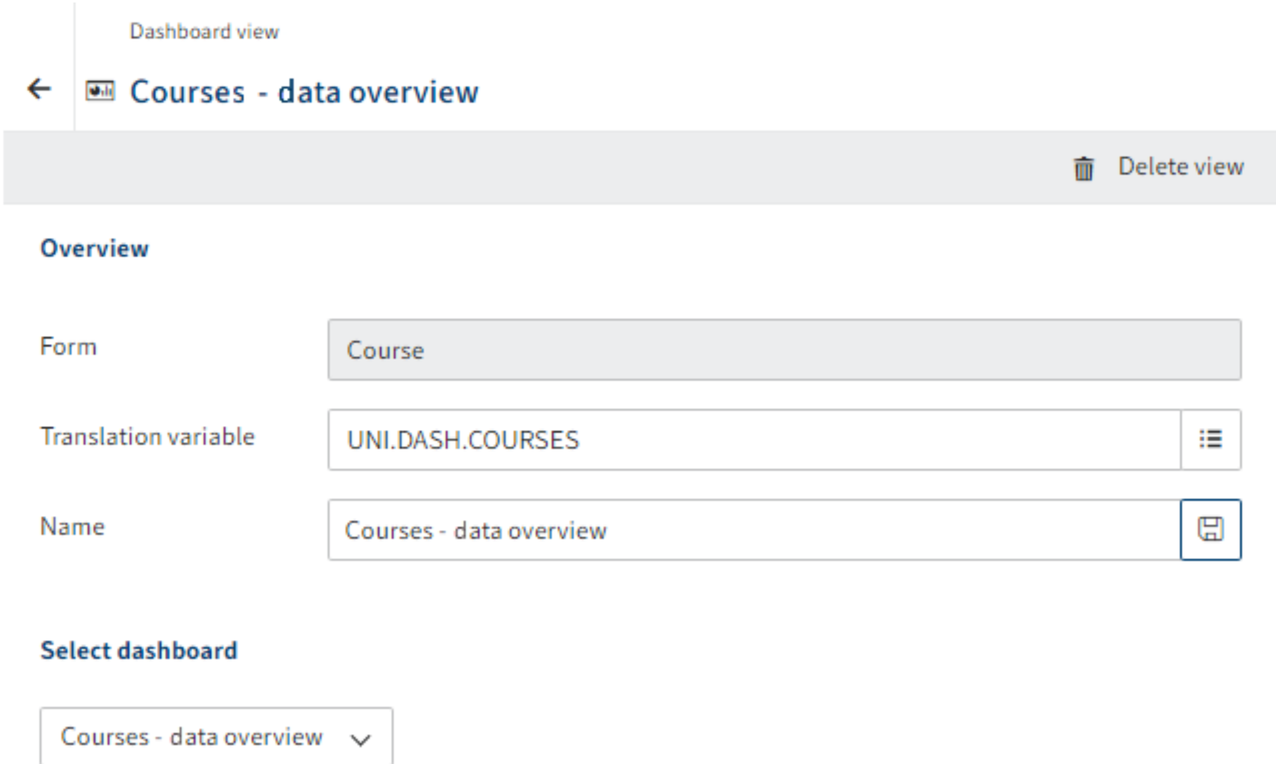


10.

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

The view is saved.

'Dashboard view' dialog box

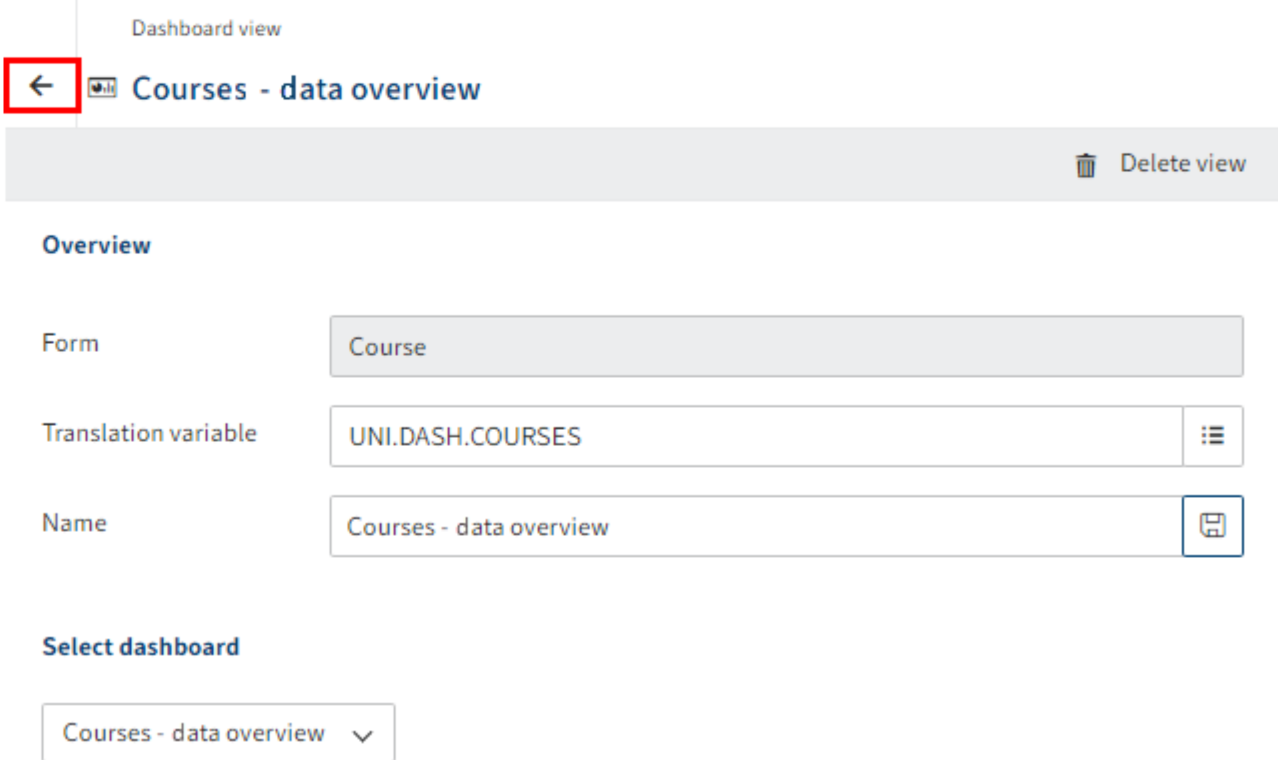


In the *Dashboard view* dialog box, you can edit the selected/created dashboard view.

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

Information

For information on how to configure dashboards for a metadata form, refer to ELO packages > Metadata > Metadata forms > Configure metadata forms > Create dashboards.



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

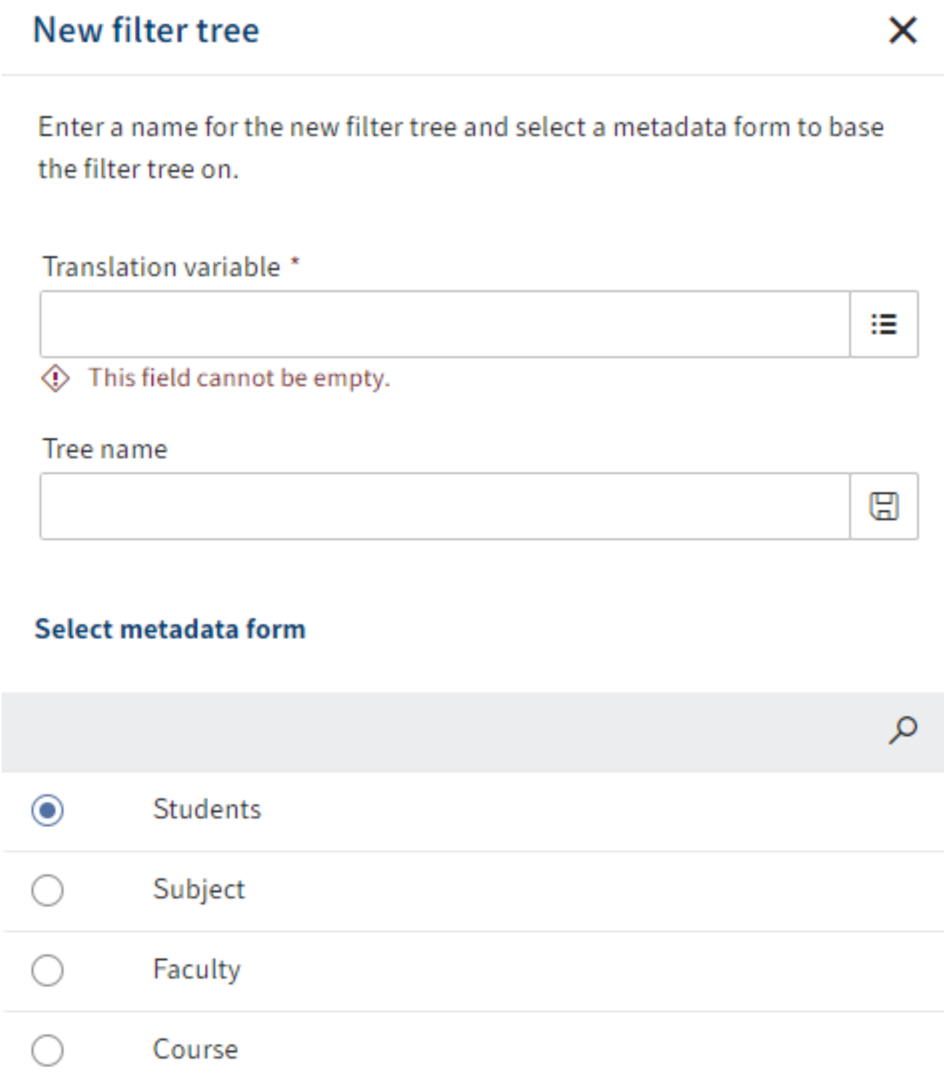
  The view is saved.

Filter trees

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

Add filter tree

1. Select *New filter tree*.



The *New filter tree* dialog box appears.

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

> **Information**
>
> Only letters (without umlauts and special characters), numbers, periods, and underscores are allowed. The first character must be a letter.

3. Enter the display name for the translation variable into the *Tree name* field.

4. Select *Save* (floppy disk icon).

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

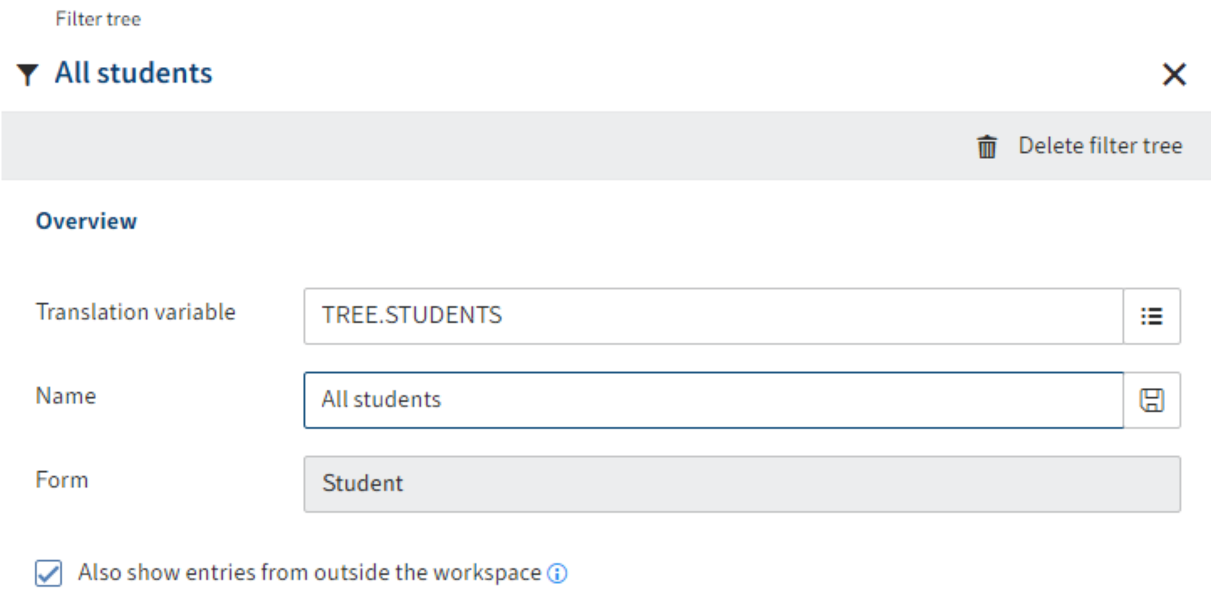
   The display name for the translation variable is automatically applied to the *Tree name* field.

5. Select a metadata form.

6.

Select *Apply*.

The *New filter tree* dialog box closes.



The *Filter tree* dialog box appears.

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

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

7. Select *Save workspace type*.

   The workspace type is saved.

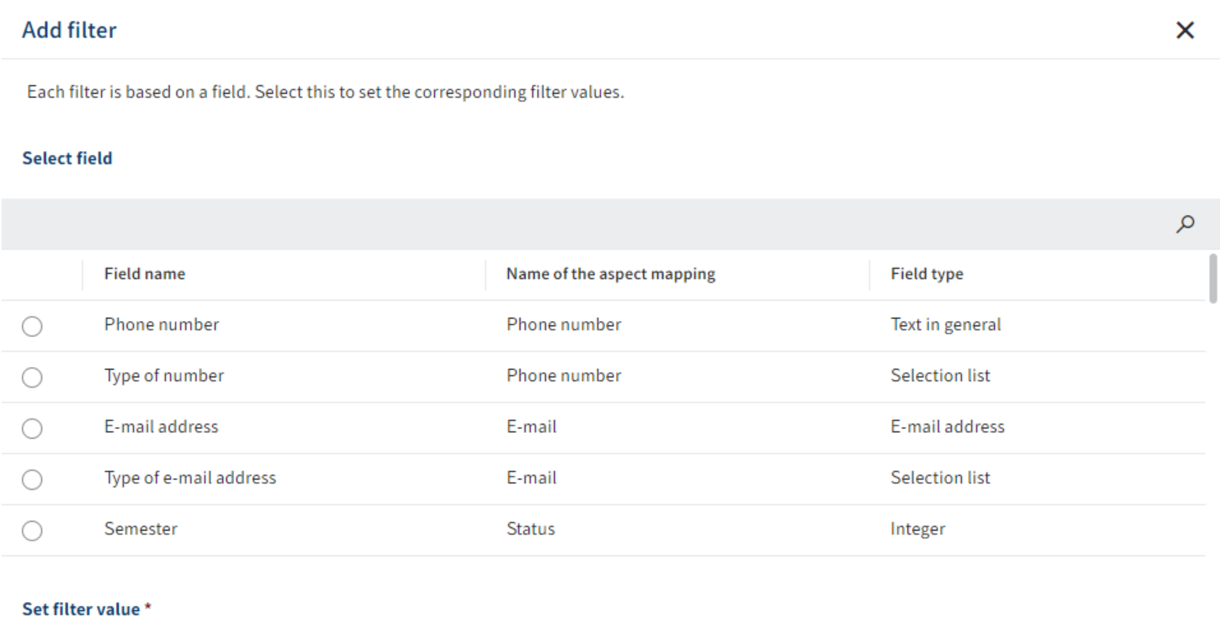
As soon as you select an existing filter tree, the *New level* and *New list* functions become available. Refer to the following sections for more information on these functions:

- New level
- New list

Base filter

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

1. Open a filter tree.
2. In the *Base filter* area, select *Add filter*.



The *Add filter* dialog box appears.

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

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

5. Select *Apply*.

   The filter is entered under *Base filter*.

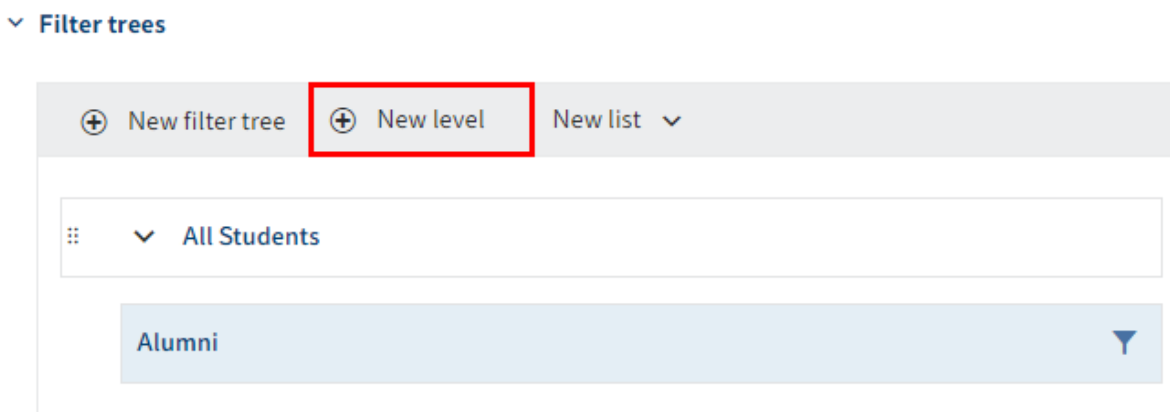
6. Select *Save workspace type*.

   The workspace type is saved.

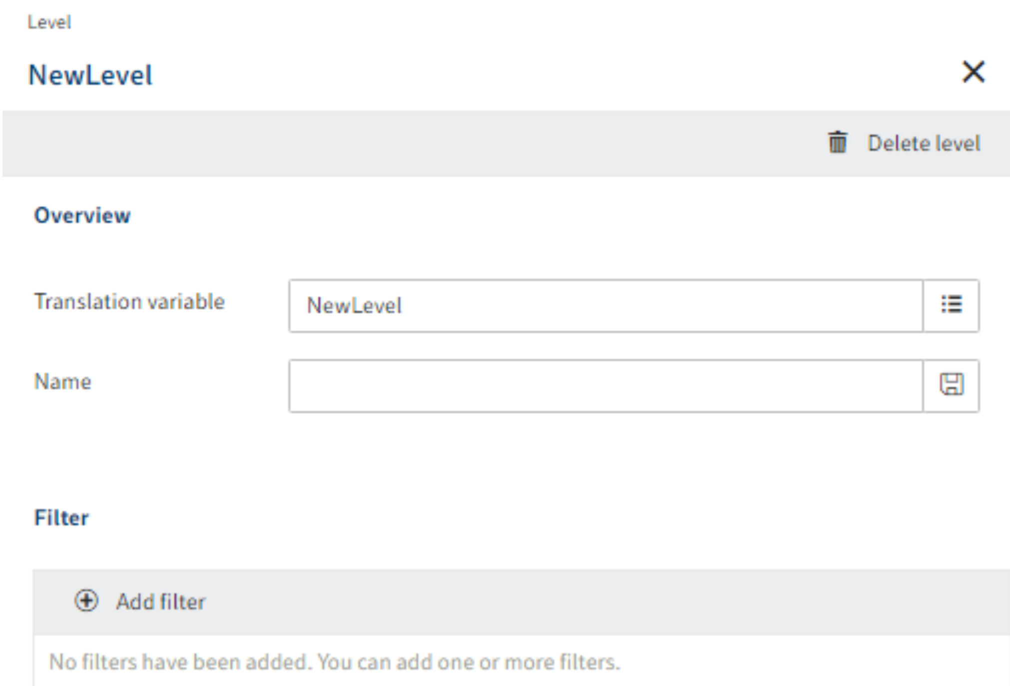
New level

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

1. Select a filter tree.



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



The *Level* dialog box appears.

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

> **Information**
>
> Only letters (without umlauts and special characters), numbers, periods, and underscores are allowed. The first character must be a letter.

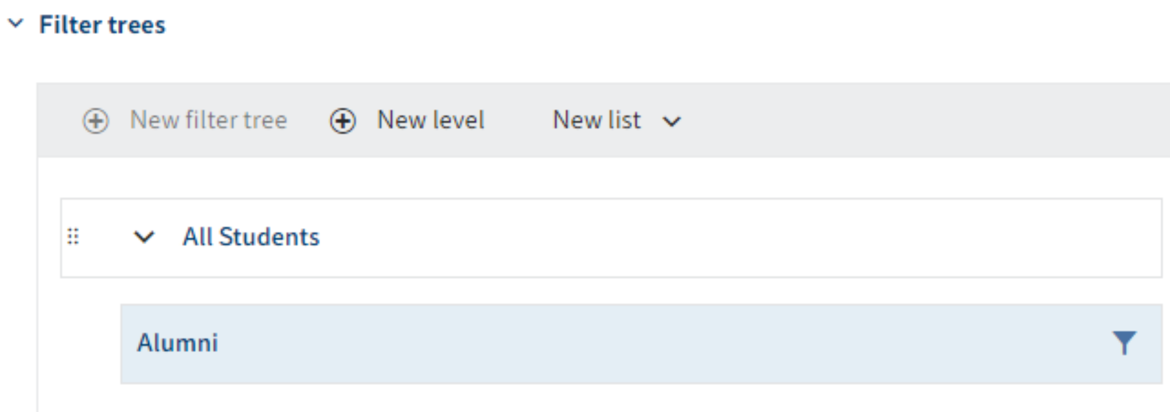
4. Enter the display name for the translation variable into the *Name* field.

5. Select *Save* (floppy disk icon).

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

The display name for the translation variable is automatically applied to the *Name* field.

6. Select *Save workspace type*.



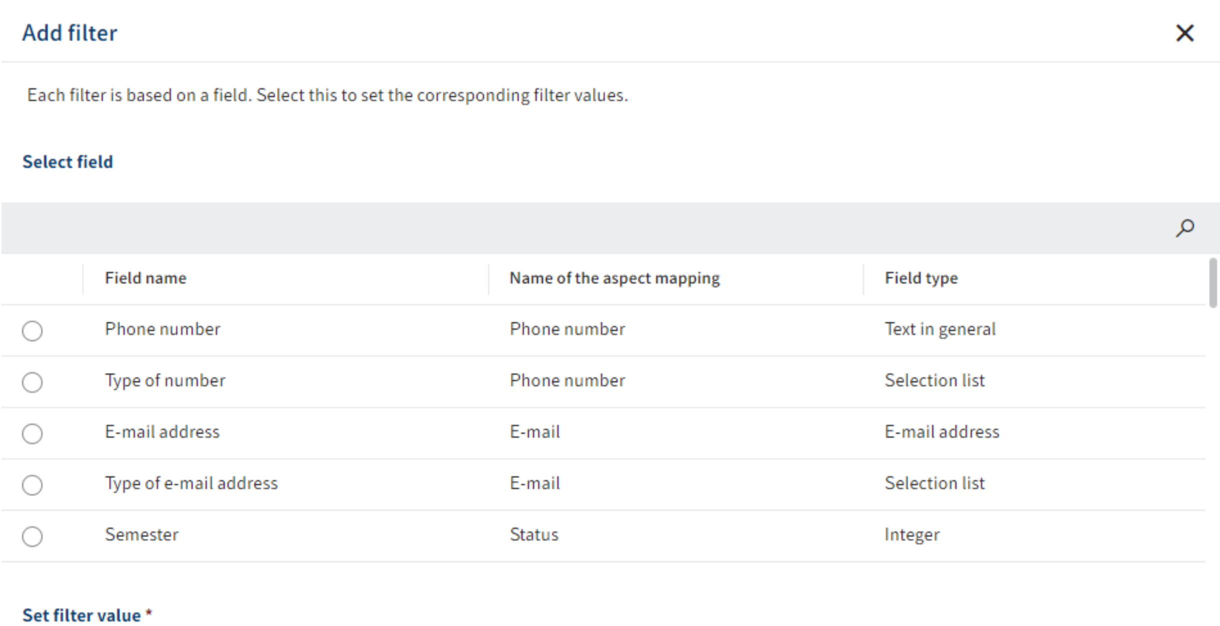
The level is entered under the selected filter tree and the workspace type is saved.

> **Information**
>
> You can add filters and lists to a level.

Add filter

Add a filter to a level as follows:

1. Select *Add filter*.



The *Add filter* dialog box appears.

2.

Select a field.

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

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

4. Select *Apply*.

   The filter is entered in the level.

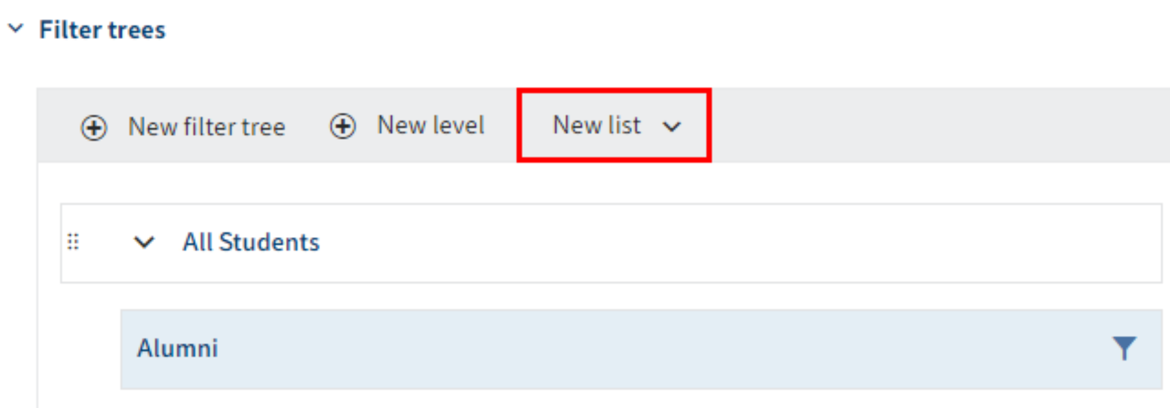
New list

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

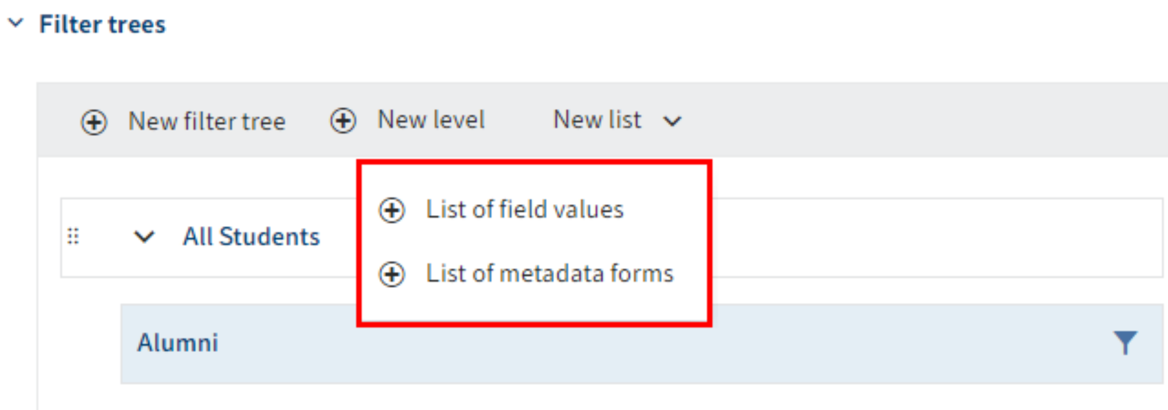
> **Information**
>
> In the client, lists are shown in the filter tree if there is at least one object relevant to the list.

1. Select a filter tree.

   Optional: Select a level if required.



2. Select *New list*.



The *New list* drop-down menu opens.

3. Select a type:
    - List of field values: A list based on the values of a field. This can be values you have entered or values from a keyword list.
    - List of metadata forms: A list based on a metadata form and metadata forms that inherit their settings from this metadata form (child metadata forms).

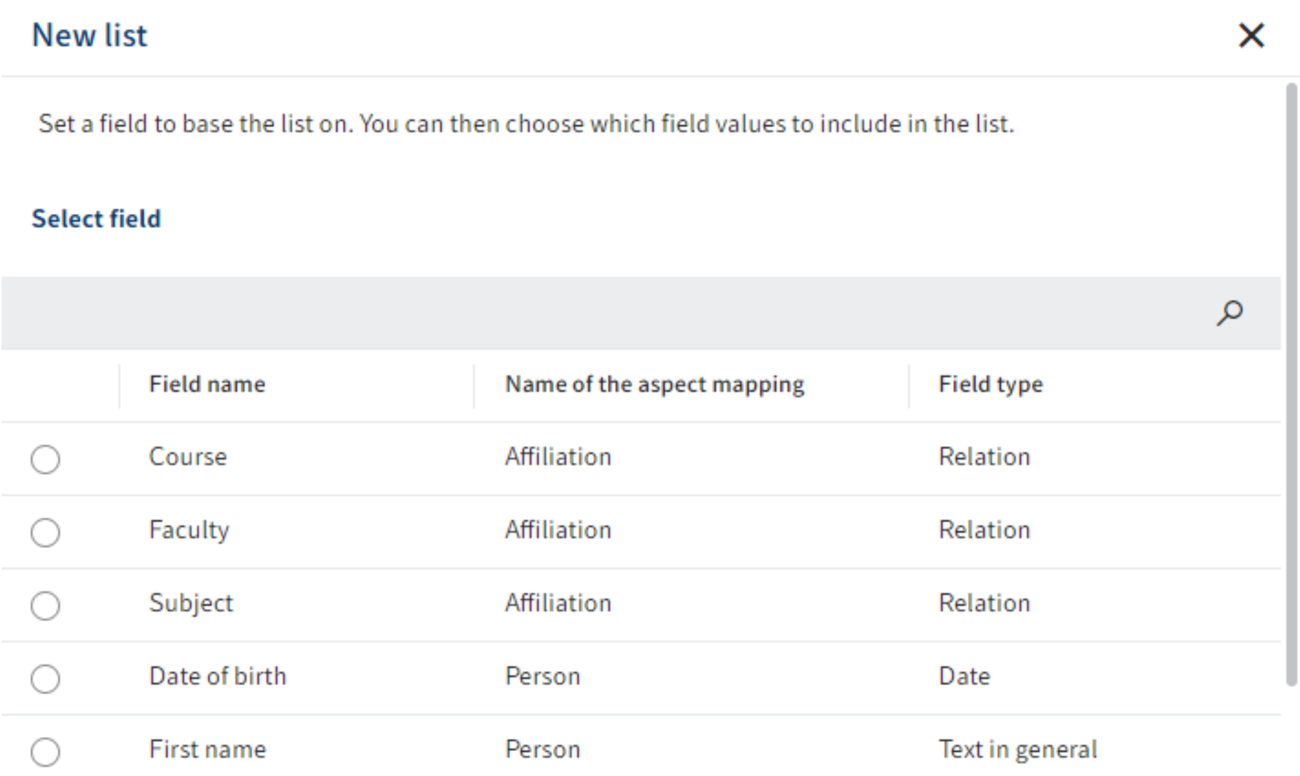
   Additional settings are required depending on the type. Configuration of the different types is explained in more detail in the following sections.

4. Configure the list depending on the selected type.

5. Select *Save workspace type*.

   The list and workspace type are saved.

Configure list of field values



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

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

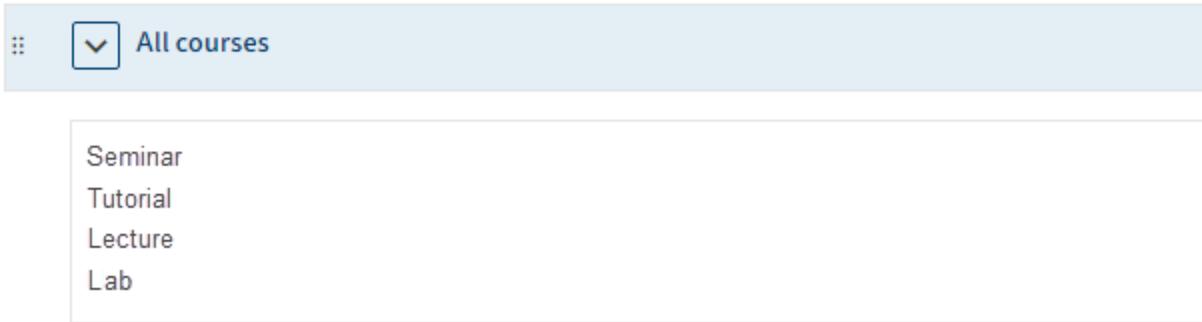
The following options are available:

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

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

List of metadata forms

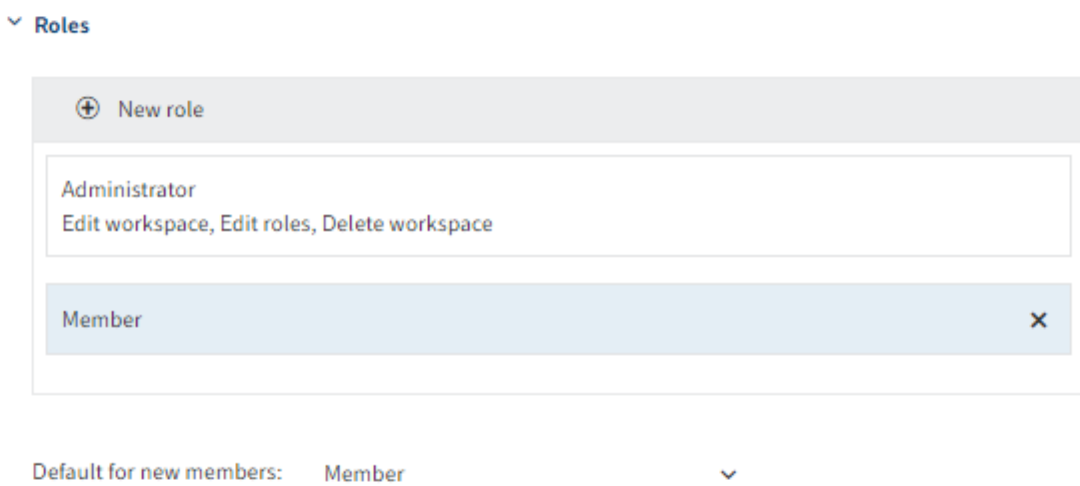
To be able to create a list based on metadata forms, you will need a metadata form that inherits its settings to other metadata forms. These metadata forms are also referred to as child metadata forms.



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

Define roles

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



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

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

The following roles are created with default settings:

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

Information

The *Administrator* role cannot be edited or deleted.

You can also set authorization options for entries that were created in a workspace. For more information, refer to the following documents:

- Space authorizations in the ELO Java Client
- Space authorizations in the ELO Web Client

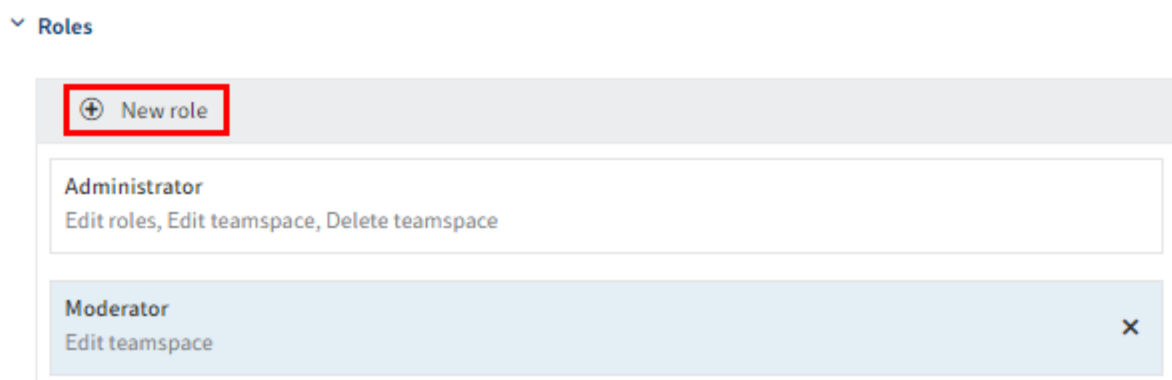
Overview of functions

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

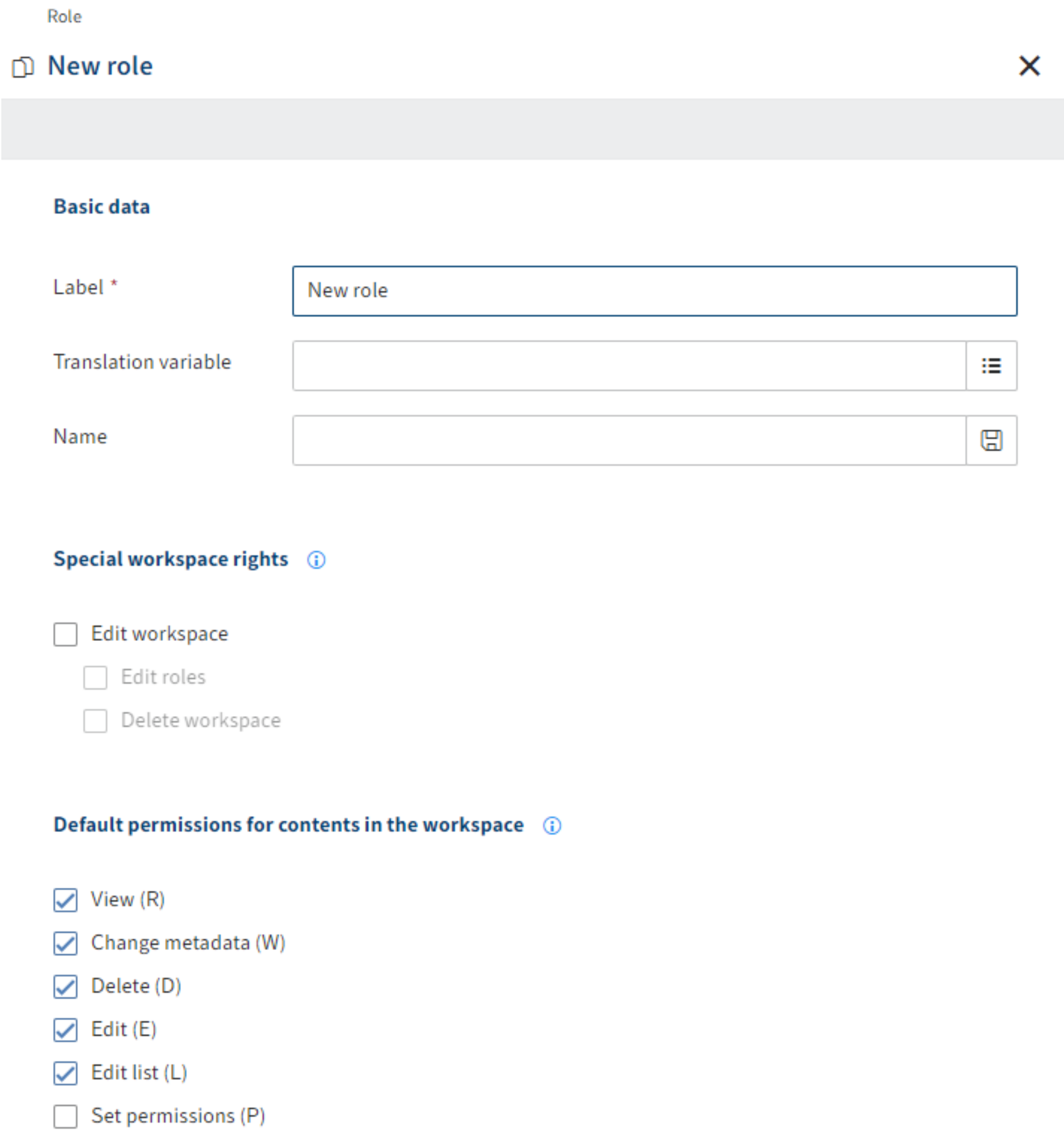
New role

Information

Roles can only be created and edited by users with the appropriate rights.



1. Select *New role*.



The *Role* dialog box opens.

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

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

   The display name for the translation variable is automatically applied to the *Name* field.

6.

Select which rights and permissions this role should receive.

You can assign the following special workspace rights:

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

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

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

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

7. Select *Save workspace type*.

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

ELO Teamspaces

Introduction

The new *Teamspace* function in the ELO client acts as a separate area for collaboration across teams. Team or project members (ELO users) can be added to different teamspaces, documents made available for collaboration, and information communicated via the ELO feed.

To use the *Teamspace* function, you must create a teamspace template in the in the corresponding package in the *Teamspace templates* area of the ELO Administration Console.

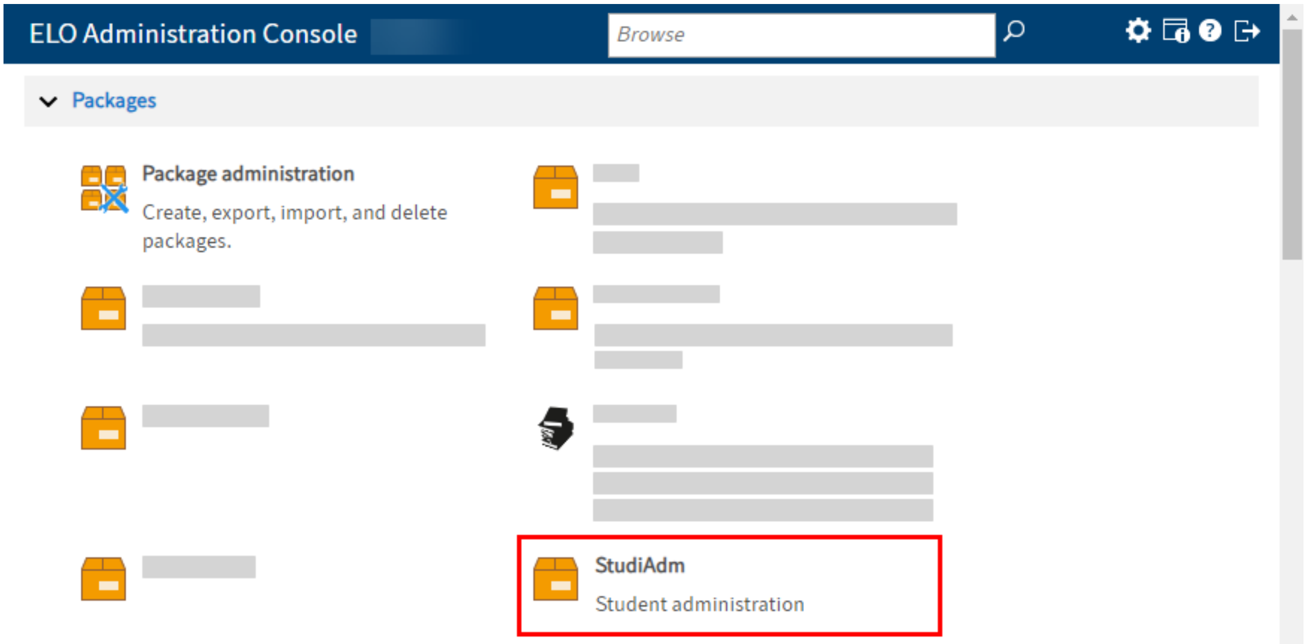
Refer to the following sections for more information:

- Create teamspace templates
- Configure teamspace templates

The following documentation is available for users:

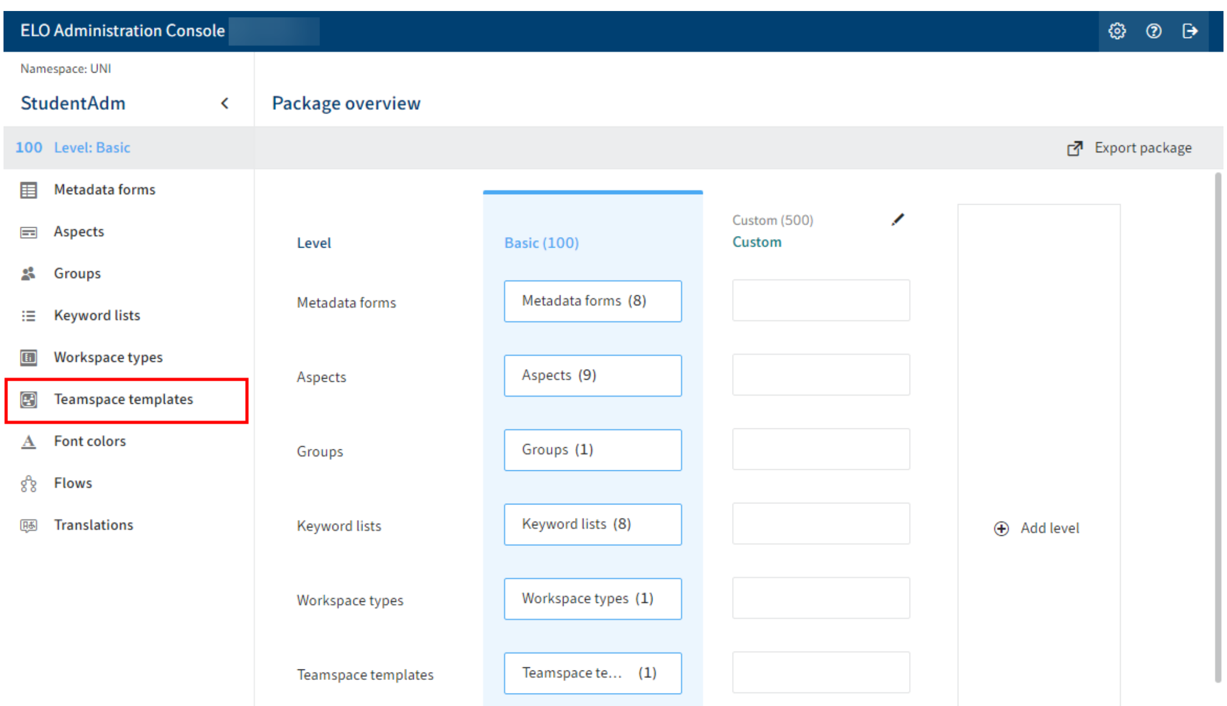
- Teamspaces in the ELO Web Client
- Teamspaces in the ELO Java Client

Create teamspace template



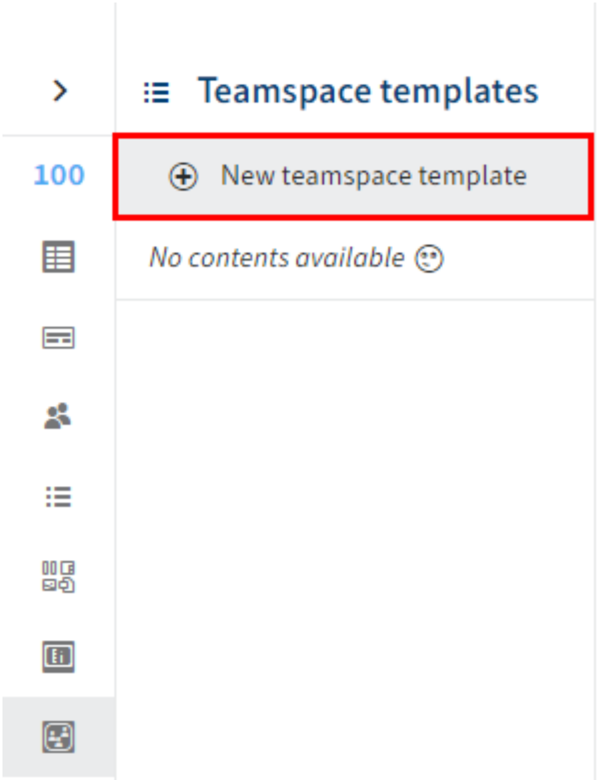
1. In the ELO Administration Console menu area, select the package where you would like to create the teamspace template.

   The package opens.



2. Select *Teamspace templates*.

The *Teamspace templates* dialog box appears.



3. Select *New teamspace template*.

   The Configuration area for the new teamspace template opens.

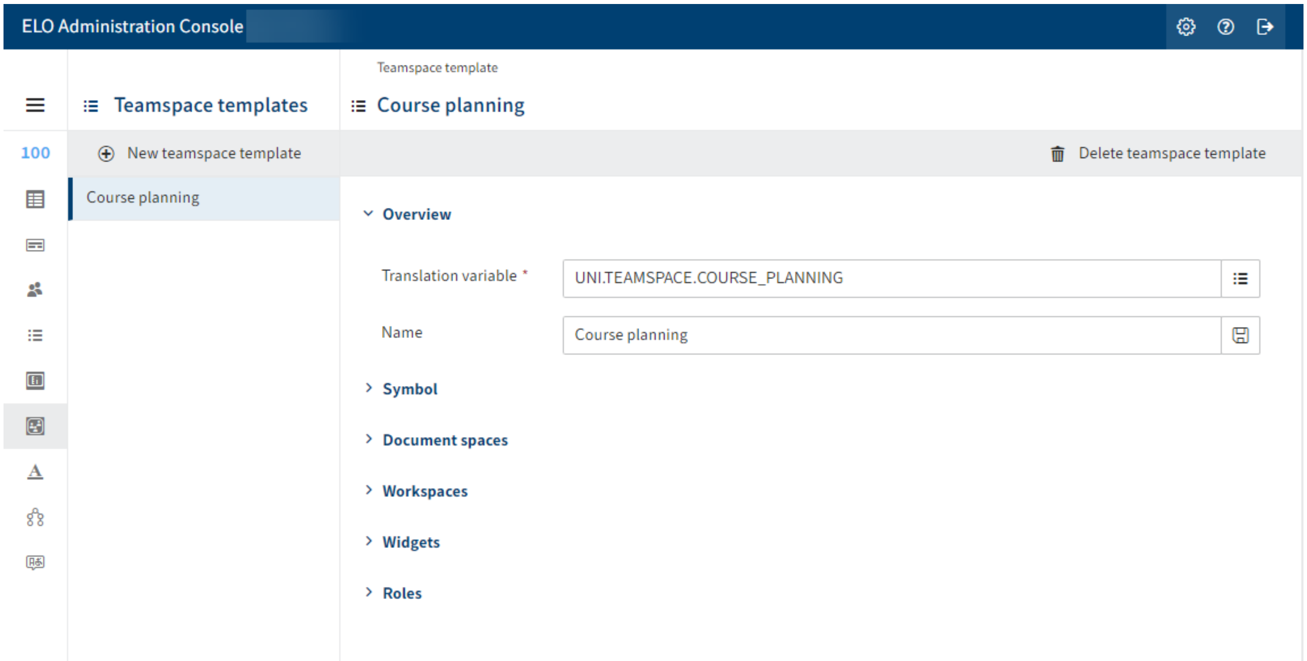
   > **Information**
   >
   > If you select an existing teamspace template, you can also configure it in the *Teamspace template* dialog box.

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

   A new teamspace template was created.

Configure teamspace template

After creating a teamspace template, you can configure them.

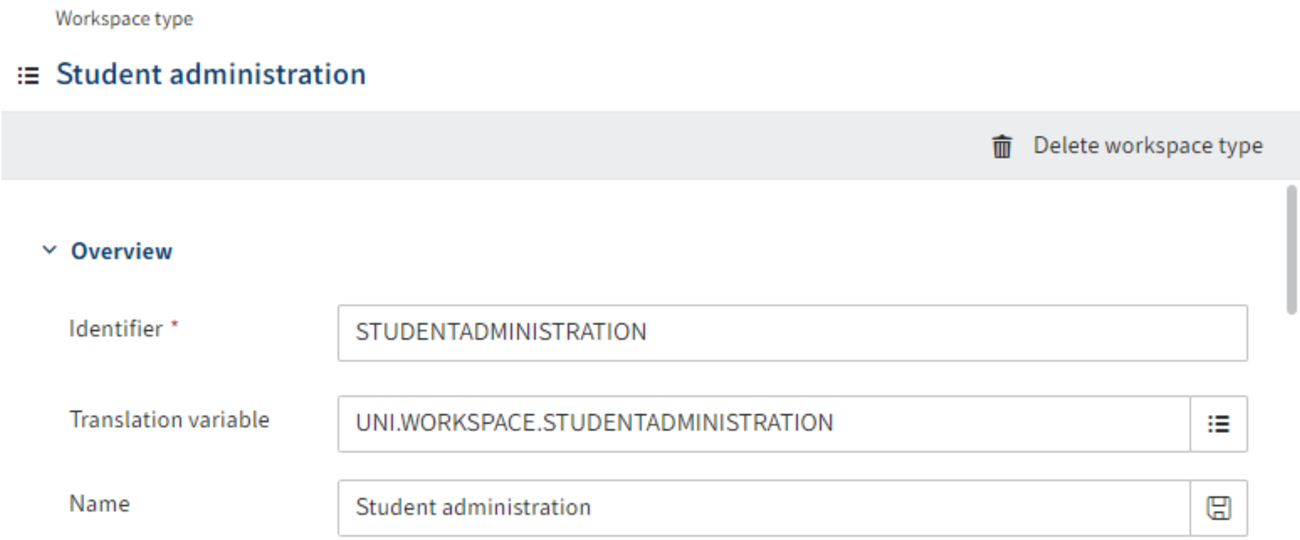


The *Teamspace template* dialog box offers the following actions:

- Enter basic data for the teamspace template
- Define icon
- Define document spaces
- Define workspaces
- Integrate widgets
- Define roles
- Delete teamspace template

Enter basic data for the teamspace template

Basic data for the teamspace template is entered in the *Overview* area.



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

   > Only letters (without umlauts and special characters), numbers, periods, and underscores are allowed. The first character must be a letter.

2. Enter the display name for the translation variable into the *Name* field.

3. Select *Save* (floppy disk icon).

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

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

4. Select *Save template*.

   The teamspace template is saved.

Define icon

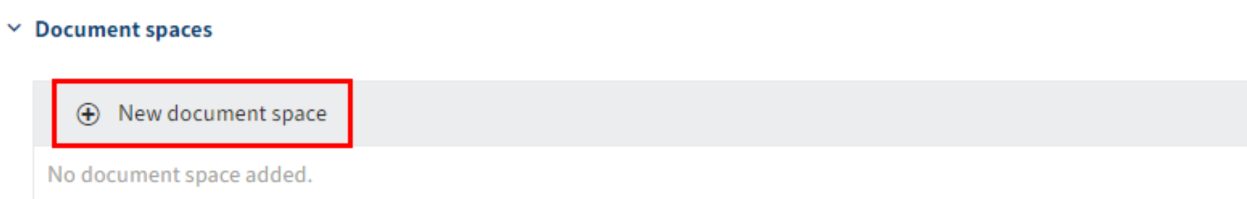
In the *Icon* area, you can select an icon to be shown in your client for the *Teamspace* function with this template.

1. Select an icon.
2. Select *Save template*.

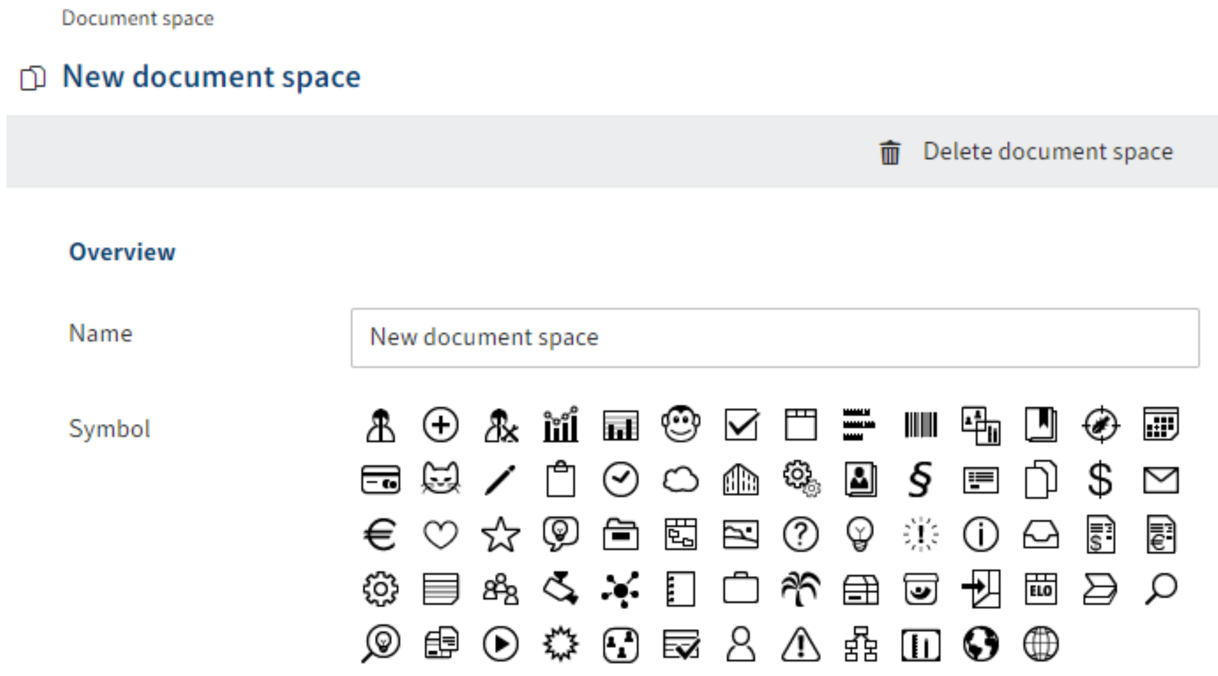
   The teamspace template is saved.

Define document spaces

You can define document spaces in your teamspace template.



1. Select *New document space*.



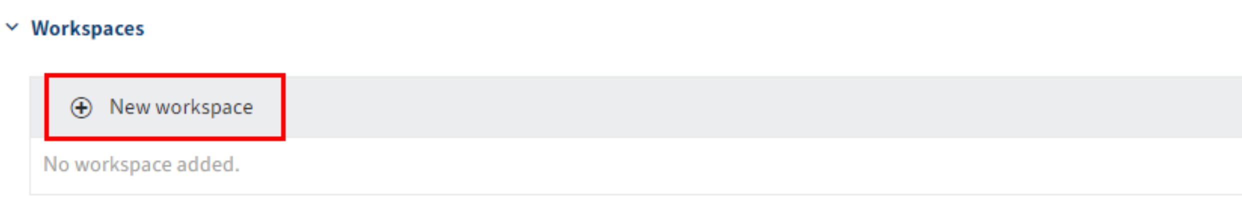
The *Document space* dialog box opens.

2. Enter a name for the document space.
3. Select an icon.
4. Select *Save template*.

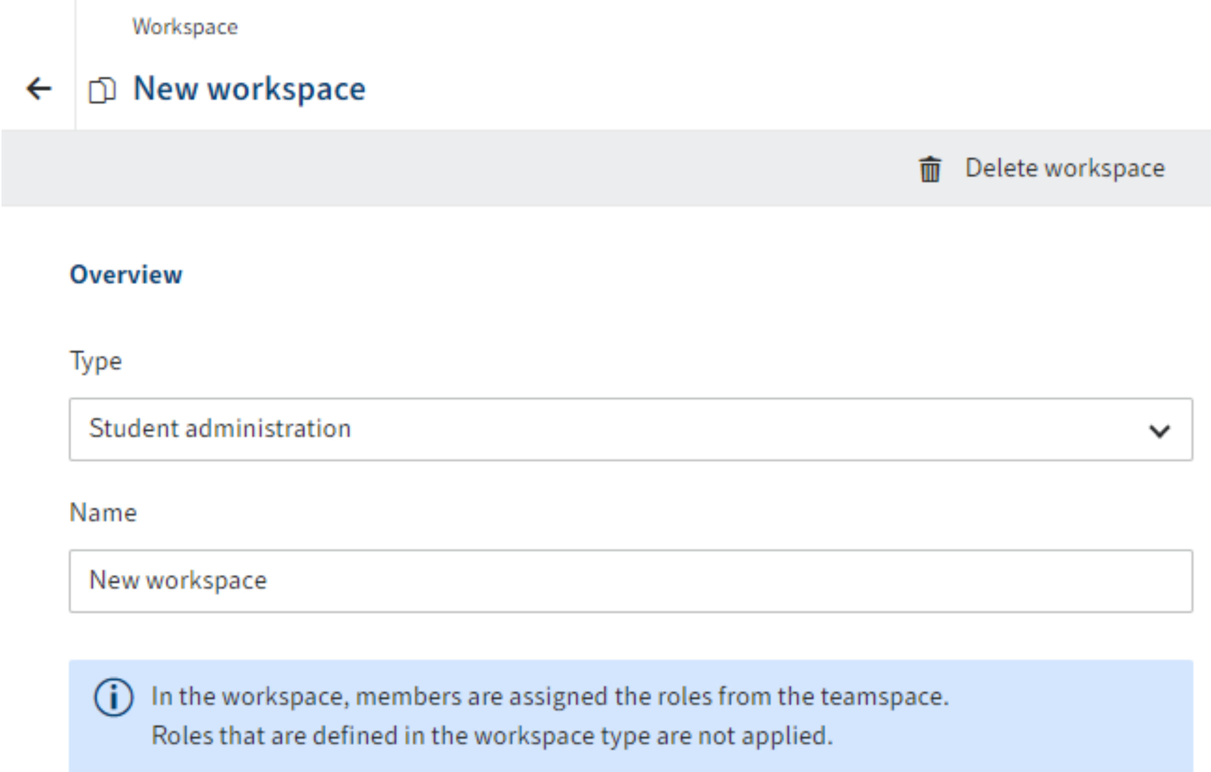
   The teamspace template is saved. You have defined a new document space in the teamspace template.

Define workspaces

You can integrate existing workflow types in your teamspace template to create new workspace instances in your teamspace.



1. Select *New workspace*.



The *Workspace* dialog box appears.

2. Select a workspace type in the *Type* field via the drop-down menu in the *Workspace* dialog box.

3. Enter a name for the new workspace.

4. Select *Save template*.

   The teamspace template is saved. You have defined a new workspace in the teamspace template.

Please note

In the workspace, members are assigned the roles as well as the associated rights and permissions from the teamspace. Roles that are defined in the workspace type are not applied.

Integrate widgets

You can integrate widgets in your teamspace. First, you must create a widget.

A widget is an ELO app. Refer to the *ELO apps API* documentation and their guides to learn how to create them. You can find this documentation in the ZIP file for *ELO Web Forms Services (ELOwf)*. Download it from the ELO SupportWeb and extract the folder. The extracted folder contains the ZIP file *wf_api_doc_<version>*, which contains the *ELO Apps API* documentation and installation instructions.

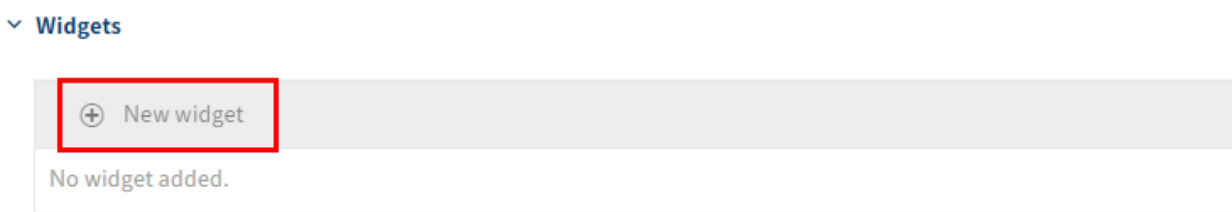
A special requirement when creating a widget for teamspaces is that during creation, you must enter the following in the app's manifest (manifest.json):

```
"widgets": [
{"type": "elo.widget.type.Teamspace"}
],
```

This entry is a list of widget types that this ELO app is available for.

> **Information**
>
> The type `elo.widget.type.Teamspace` is currently the only available type. It stands for the home screen of a teamspace.

Select *New widget* to integrate the widget.



Define roles

In a teamspace, users have different roles with different associated rights and permissions. You can define roles in this area.

A teamspace contains four pre-defined roles with defined rights and permissions:

- Administrator: The creator of a teamspace is automatically assigned the role of *Administrator*. Other team members can also be assigned the role of *Administrator*. Administrators have all the rights to the teamspace and all permissions to the contents in the teamspace.
- Moderator: Users with this role have the right to edit the teamspace but not delete it. Like administrators, they have all the permissions to the contents of the teamspace.
- Member: Users with this role have the permissions to view, edit, and delete contents in the teamspace.
- Guest: Users with this role have permission to view the contents in the teamspace.

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

You can also set authorization options for entries that were created in a teamspace. For more information, refer to the following documents:

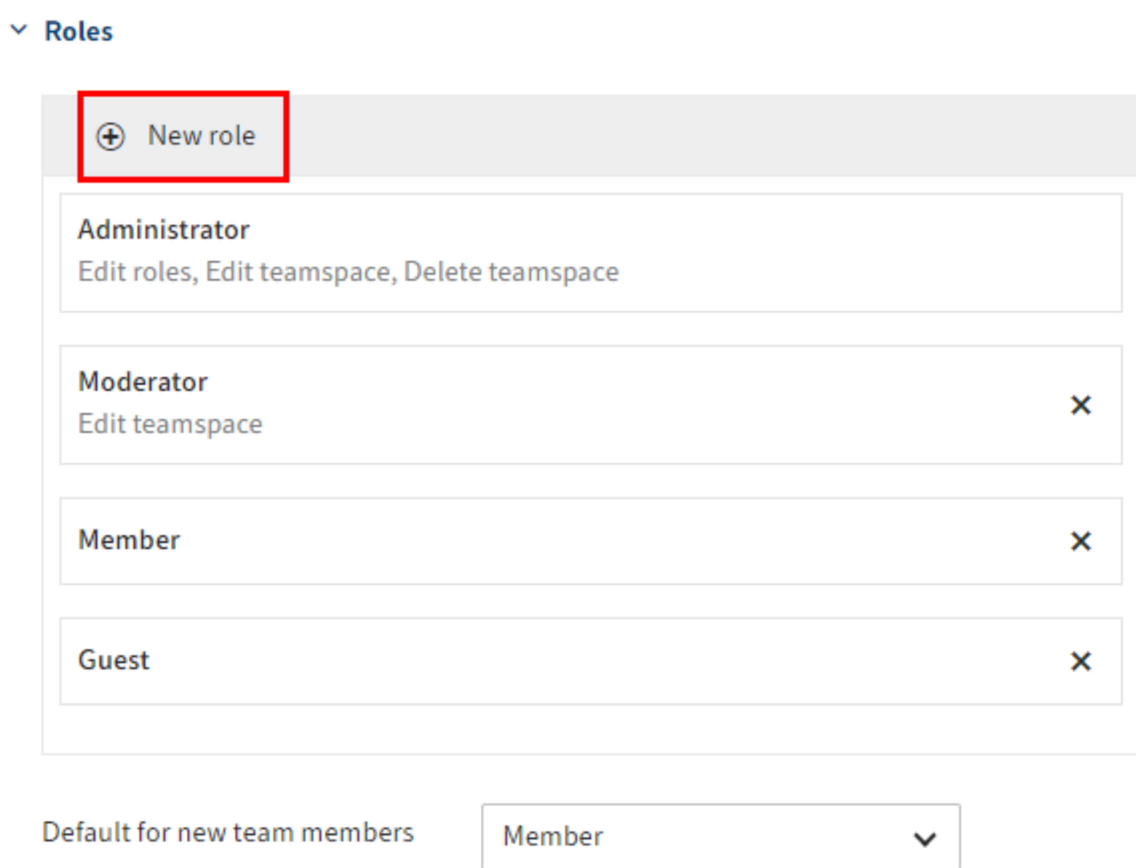
- [Space authorizations in the ELO Java Client]
- [Space authorizations in the ELO Web Client]

Overview of functions

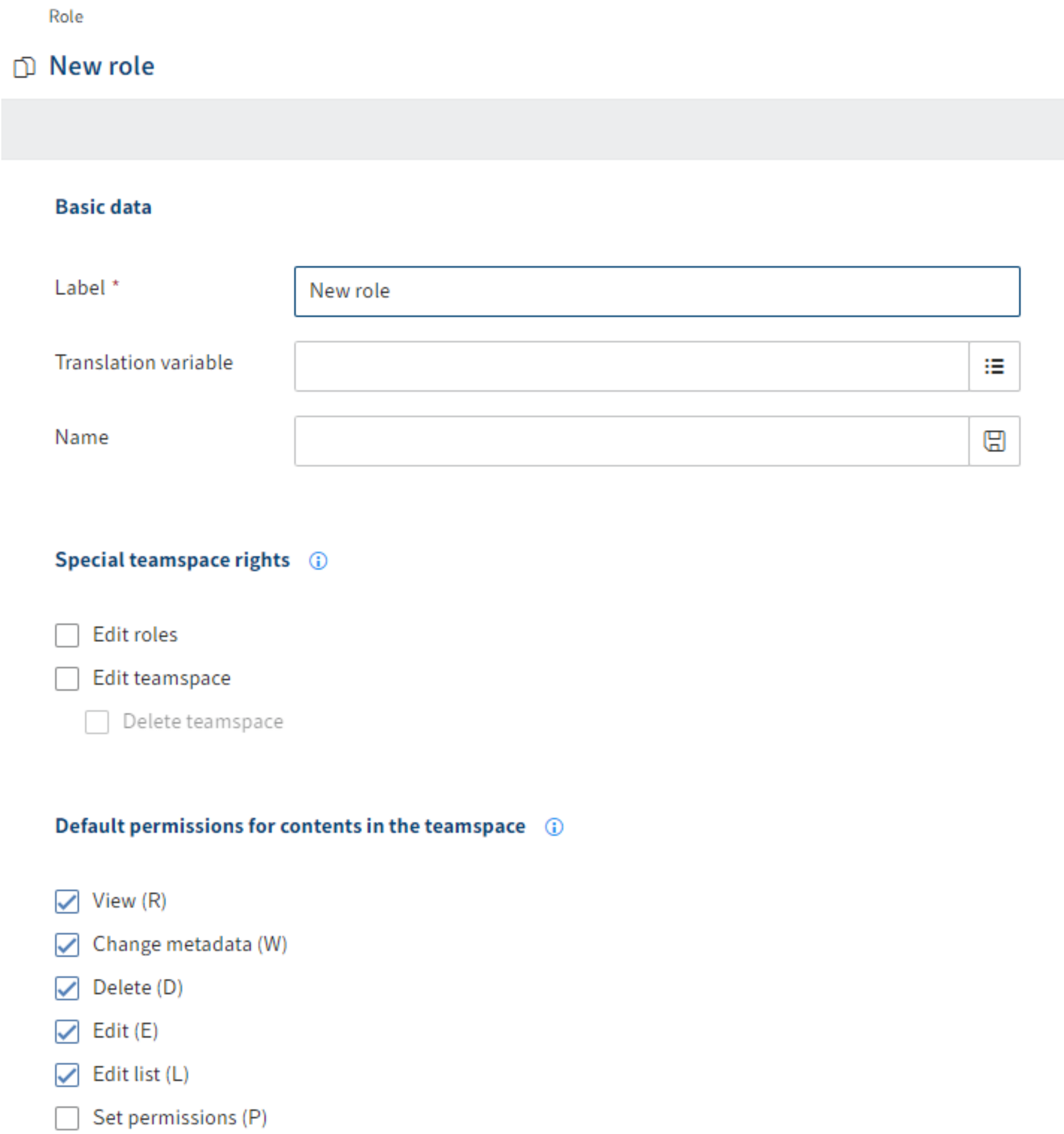
- New role: You can add a role to the teamspace template. See the following section for additional information on this.
- Roles: Selecting one of the existing roles lets you see the role's settings and edit them if you have the rights.
- Default for new team members: Select which role is set as standard for new members.

New role

> **Information**
>
> Roles can only be created and edited by users with the appropriate rights.



1. Select *New role*.



The *Role* dialog box opens.

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

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

4. Enter the display name for the translation variable into the *Name* field.

5. Select *Save* (floppy disk icon).

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

The display name for the translation variable is automatically applied to the *Name* field.

6. Select which rights and permissions this role should receive.

   You can assign the following special teamspace rights:

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

   You can assign the following default permissions for contents in a teamspace:

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

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

7. Select *Save template*.

   The teamspace template is saved. The role can now be used for new teamspaces. Existing teamspaces with this teamspace template do not take on the role.