Global contents

Glossary

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Glossary

A

Action

Action in ELO Business Solutions

Actions are sequences of simple events that the user can trigger in the client via a function (button). Actions are implemented as an Indexserver script or an ELOas rule.

Example: The *Create file* action creates a folder, starts a workflow with the same name and triggers client events such as *Show form*.

Action in ELO XC

Actions are configured for processing e-mails and are arranged hierarchically and logically in action trees. There are different action types, each of which have different parameters.

Example: The *Move* action can be used to move e-mails to other mailbox folders.

Administrator

Is a user with maximum rights who cannot be deleted. The administrator is the only user that is created during the installation. Only an administrator can create new repositories or make changes to the database after an update.

ARCPATH

ARCPATH is a keyword for the filing path of an object. It is used when programming or configuring ELO applications to indicate a filing path in ELO.

Aspect

An aspect is a gen. 2 metadata component that includes related fields. For example, an *Address* aspect can contain the fields *Street*, *House number*, *Postal code*, and *City*. It is possible to define different views for an aspect. Aspects enable you to standardize metadata templates so that they can be used again.

C

Check out/in

The checkout process refers to removing a document from the *Repository* work area so it can be edited. It is opened in a corresponding application, e.g. a Word document opens in Microsoft Word. As long as the document is checked out, it is locked for other users. This prevents multiple users from being able to make changes to a document at the same time. After the document has been checked in, it is available to other users again for editing.

D

Document

Documents are files in ELO such as invoices, e-mails, or images. The documents are stored in folders.

Duplicate

A duplicate is a document which has been filed to ELO more than once.

When filing documents, ELO recognizes whether the document already exists in ELO.

E

Encryption key

It is possible to assign an encryption key to a document on filing.

In this case, the user must enter the password of the encryption key to open the document. Encryption keys and passwords are created in the ELO Administration Console.

Entry

An entry is the parent term for folders and documents in ELO.

F

Filing

Filing refers to the process of assigning attributes (metadata) to documents so that they can be found again later and storing them in ELO. The system corresponds to the traditional method of filing physical documents. The stored documents make up a part of the repository and database.

The *Repository* work area is where you manage your documents.

Flows

ELO Flows enable users to easily implement automation and integration tasks. ELO Flows can be edited in the ELO Administration Console and provide an alternative to scripting in ELO.

G

GUID

A Globally Unique Identifier (GUID) is a unique number used for documents and folders in ELO on distributed computer systems. This is automatically assigned and cannot be modified.

K

Keyword list

Keyword lists can be used to search for the metadata of an object in ELO, for example, and to access the search result. Keyword lists can be static or dynamic.

Dynamic keyword list

A dynamic keyword list loads contents from external databases. For example, it enables users to view multiple columns of data, filter a field depending on other fields, or complete multiple fields automatically.

Static keyword list

A static keyword list is a list that is created manually in the ELO Administration Console.

M

Metadata

Metadata are information about entries in ELO. Metadata allows users to file entries in a standardized way and retrieve them using the search. Metadata can be used to establish relationships between entries and trigger processes, for example. Metadata includes the short name of an entry as well as additional information such as the filing date, options, and permissions.

Metadata form

The metadata form contains typical information for the corresponding document type, such as the short name and other attributes, e.g. permissions. This allows users to quickly file documents in a standardized way. For example, a metadata form for invoices can contain fields for the invoice number, amount, or due date.

P

Package

A package contains all the configurations of a specific solution. For example, a package is used to configure metadata (gen. 2), forms (gen. 2), workflows, and automation using flows. It is possible to export or import an entire solution as a package.

Permissions

Permissions define the extent to which users may access an object (e.g. read or delete).

R

Reminder

A reminder defines a date on which a document or the folder appears in the *Tasks* work area of the user responsible.

Replication

Replication refers to the synchronization of data between multiple repositories at different sites through the use of replication sets. For example, a replication set groups folders or documents that you want to transfer to other sites.

Repository

The repository is where files are stored in ELO. The term is used in an administrative context for the main work area in ELO.

S

Short name

The short name is the name of an entry within ELO. It is defined in the metadata form.

SORD

A SORD is an object in ELO, e.g. document, folder, workflow, or metadata form. SORD represents the traditional filing system of *cabinets*, *folders*, *tabs*, and *documents*.

Spaces

Spaces are areas where you can collaborate with other users. You can share entries from the repository, file new entries, and work on them with members of the space.

See also Teamspace and Workspace.

T

Teamspace

The *Teamspace* function enables you to collaborate across teams. All ELO users added to a teamspace can gather and edit documents together and exchange information using the feed.

U

User

A user can work in ELO after logging on. Users and user rights are defined in the user manager.

User manager

The user manager is where rights are granted to users and administered within the ELO system. This the responsibility of the *Administrator* or another user or users with administrator rights. You will find the user administration in the ELO Administration Console.

User rights

User rights define which actions a user may perform within ELO. Rights are set for users and groups in the ELO Administration Console. These include rights such as *Edit user data*, *Delete documents*, or *Manage workflows*.

V

Versioning

ELO saves every version of a document. A new version can be created when you file a document, or when a document is checked out and checked back in. It is possible to access all previous versions as required.

W

Workflow

A workflow consists of a series of processing steps for folders or documents. The processing steps can either be executed automatically or by specific users.

Workspace

Workspaces are workspaces in ELO for different functional levels. With the help of filters and different views, you can edit data and analyze it in charts and tables.