Business Solution ELO Public Sector

Business Solution ELO Public Sector 1.04

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Introduction

Structure of the documentation

The goal of this documentation is to explain all functions of Business Solution ELO Public Sector.

Basics

The Basics chapter explains the basics of the ELO Public Sector program interface.

Possible actions

The remaining chapters address possible actions using ELO Public Sector.

Target audience

This documentation is addressed to Business Solution ELO Public Sector users. Separate documentation is available for administrators on the ELO SupportWeb.

The scope of functions presented in this documentation may differ greatly from those in your client.

If you do not find functions described in this documentation in your client, you do not have permission to perform the action.

Basics

Basic principle

Business Solution ELO Public Sector is designed to meet the special requirements of government and public authorities.

ELO Public Sector covers the process of managing official records.

You can use ELO Public Sector to digitalize your filing plan in ELO. In your filing plan, you can create and manage files. You can link your digitalized files to your physical files using QR codes as needed.

Reports help you keep an overview of your filing plan and your files.

Cases and circulation folders also help you map routines.

General note

ELO Public Sector works with the following clients:

- ELO Web Client
- ELO Java Client
- ELO Desktop Client

> **Information**
>
> In this documentation, we use screenshots from the ELO Web Client. The standard ELO Public Sector solution is shown.

Requirements

Your administrator must have configured ELO Public Sector for you.

Program interface

You will find ELO Public Sector functions in the following areas:

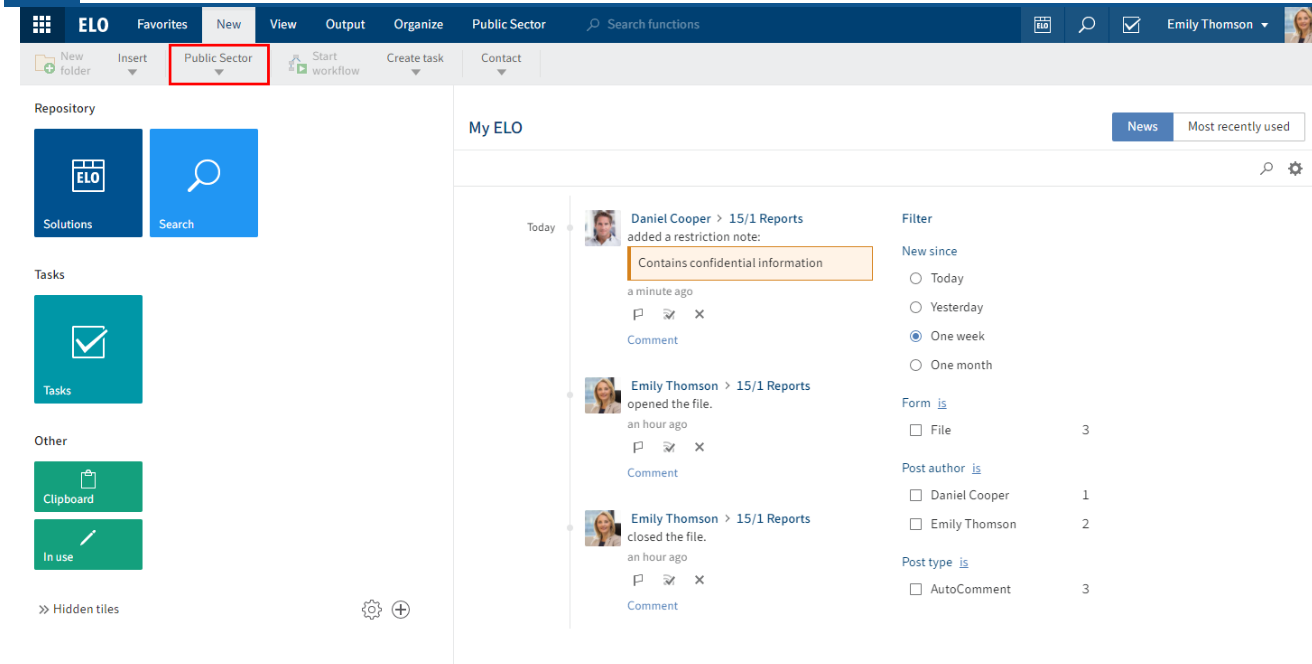


Fig.: Business Solution ELO Public Sector program interface

1 'Public Sector' group on the 'New' tab

With the functions in this group, you create elements in the filing plan.

Fig.: 'Public Sector' tab

2 'Public Sector' tab

With the functions on this tab, you can make changes to the filing plan or request changes, start signature processes and directives, create reports, and automatically generate record objects.

Filing plan

You can reach your filing plan via the repository.

The filing plan contains files with different statuses. You will recognize the statuses based on the color of the files:

- Green: The file is open and can be edited. Files can be closed and re-opened.
- Red: The file is closed and can no longer be edited. A closed file can be re-opened on request.
- Yellow: The file is locked and should no longer be edited. A locked file can be unlocked.

File references are generated automatically when creating files.

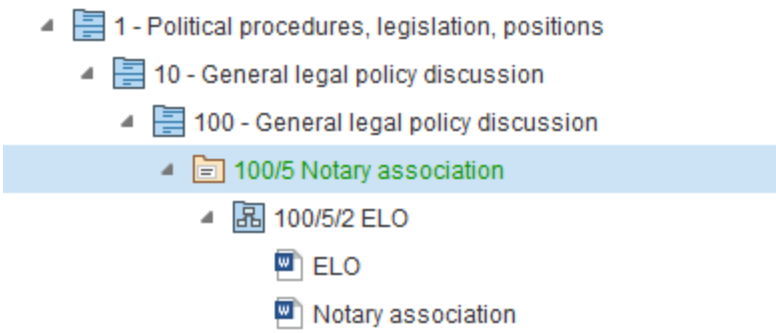


Fig.: Part of a filing plan with file, case, and record objects

Files can be structured differently depending on your needs. They can be organized in file groups, or contain sub-files, cases, documents, or record objects.

Importing, exporting, and maintaining filing plans

The following explains the functions of Business Solution ELO Public Sector, which are generally performed by the filing department. Additional rights are required for these functions.

This chapter addresses the following functions:

- Import filing plan
- Create group
- Structure group
- Export filing plan

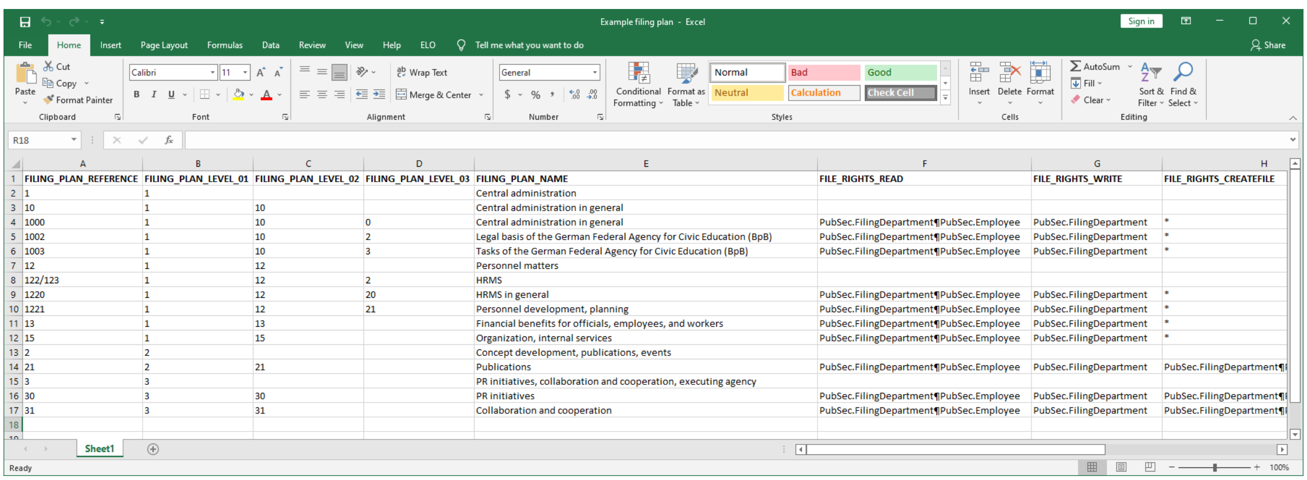
Import filing plan

Information

You can digitalize an existing filing plan and import an entire structure.

Requirements

- This function is only available in the ELO Java Client.



FILING_PLAN_REFERENCE	FILING_PLAN_LEVEL_01	FILING_PLAN_LEVEL_02	FILING_PLAN_LEVEL_03	FILING_PLAN_NAME	FILE_RIGHTS_READ	FILE_RIGHTS_WRITE	FILE_RIGHTS_CREATEFILE
1	1			Central administration			
10	1	10		Central administration in general			
1000	1	10	0	Central administration in general	PubSec.FilingDepartment¶PubSec.Employee	PubSec.FilingDepartment	*
1002	1	10	2	Legal basis of the German Federal Agency for Civic Education (BpB)	PubSec.FilingDepartment¶PubSec.Employee	PubSec.FilingDepartment	*
1003	1	10	3	Tasks of the German Federal Agency for Civic Education (BpB)	PubSec.FilingDepartment¶PubSec.Employee	PubSec.FilingDepartment	*
12	1	12		Personnel matters			
122/123	1	12	2	HRMS			
1220	1	12	20	HRMS in general	PubSec.FilingDepartment¶PubSec.Employee	PubSec.FilingDepartment	*
1221	1	12	21	Personnel development, planning	PubSec.FilingDepartment¶PubSec.Employee	PubSec.FilingDepartment	*
13	1	13		Financial benefits for officials, employees, and workers	PubSec.FilingDepartment¶PubSec.Employee	PubSec.FilingDepartment	*
15	1	15		Organization, internal services	PubSec.FilingDepartment¶PubSec.Employee	PubSec.FilingDepartment	*
2	2			Concept development, publications, events			
21	2	21		Publications	PubSec.FilingDepartment¶PubSec.Employee	PubSec.FilingDepartment	PubSec.FilingDepartment¶
3	3			PR initiatives, collaboration and cooperation, executing agency			
30	3	30		PR initiatives	PubSec.FilingDepartment¶PubSec.Employee	PubSec.FilingDepartment	PubSec.FilingDepartment¶
31	3	31		Collaboration and cooperation	PubSec.FilingDepartment¶PubSec.Employee	PubSec.FilingDepartment	PubSec.FilingDepartment¶

Fig.: XLS file with filing plan

- You need a CSV file or an XLS file with your filing plan.

> **Information**
>
> Only the first worksheet is read and processed.

- The first row of the table must contain the respective ELO fields. There is no restriction to the type and number of transferred fields here.

Method

1.

At the top level, create a folder for the filing plan using the *New > New folder* function.

2. Select the folder you just created to import the filing plan to it.

3. On the *Output* tab, click *Export/Import > Import filing plan*.

4. In the *Import filing plan* dialog box, select the CSV or XLS file.

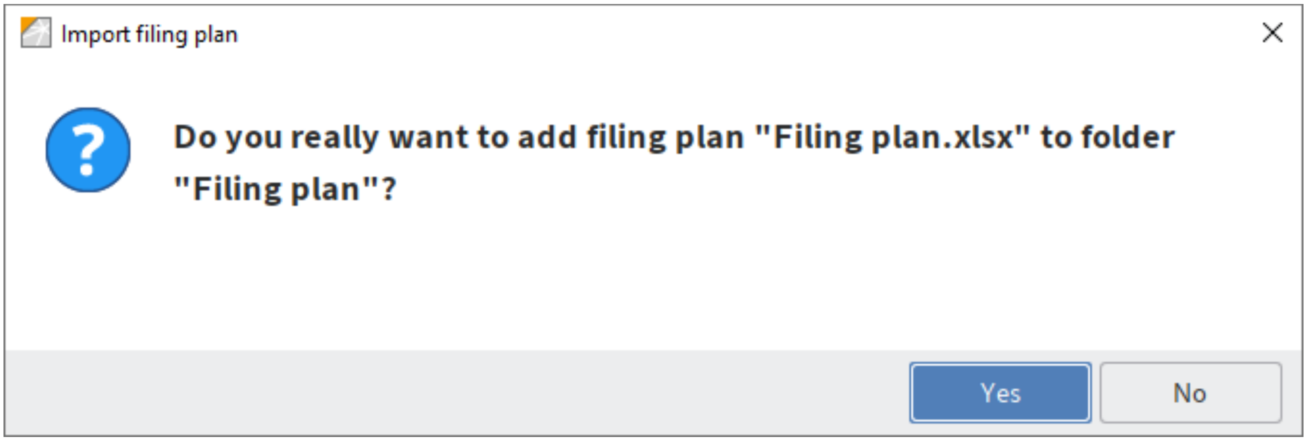


Fig.: 'Import filing plan' dialog box

1. Click *Load* and confirm your selection in the *Import filing plan* dialog box.

Result

The filing plan is imported to the selected folder.

Outlook

The filing plan can now be filled by creating files in the groups of the filing plan via Create file.

You can also create additional groups.

Create group

Information

You can also add individual groups to the filing plan.

Method

1. In the filing plan, select the group where you want to create additional groups.

2. On the *New* tab, click *New folder*.

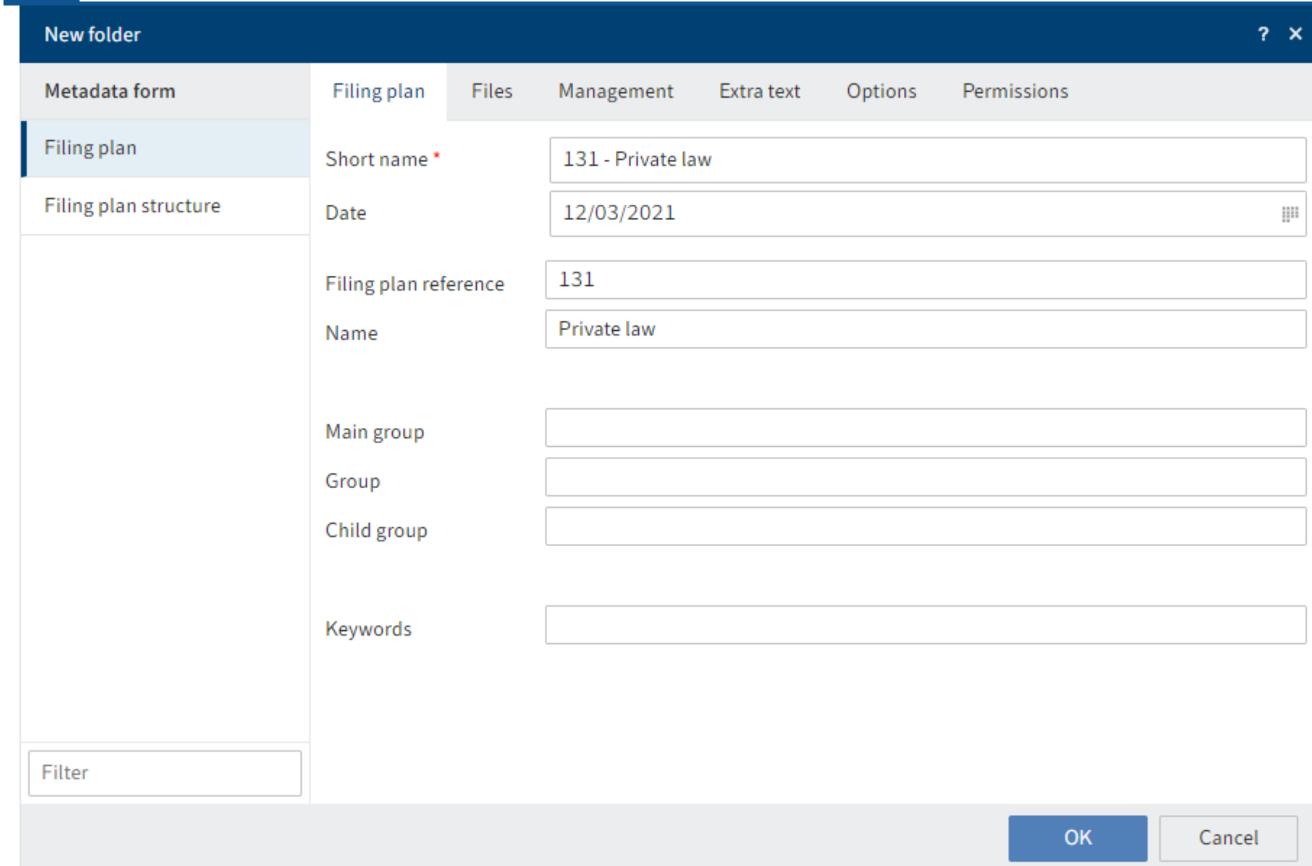


Fig.: 'New folder' dialog box, 'Filing plan' metadata form

In the *New folder* dialog box, keep the *Filing plan* metadata form.

1. Complete the required fields.
2. Click *OK*.

Parameter

Tab	**Field**	**Meaning**
Files	Unit for retention period	Select a unit and enter a number in the *Retention period* field as well.
	Retention period	If you also enter a number in addition to the unit, the retention period for elements created within this group is calculated automatically.
Options	Entry type	Select *sol.Filing Plan* as the icon for the group.

Keyword lists

Keyword lists are available for some of the fields. You have the following options:

- Select an element: All entries appear via the menu at the end of the field. Select the element.
-

Select multiple elements: Using a separator (¶), you can string multiple elements. In this case, you can only select the first element. Right-click to insert a separator. You will have to enter the other elements manually, separated by separators.

- Select all elements: To select all elements, enter an asterisk (*).

Result

The group is created at the selected position in the filing plan.

Outlook

It can now be filled by creating files via Create file.

Structure group

Information

You can further structure a group in your filing plan, for example by creating a folder from A to Z.

Method

1. In the filing plan, select the group you want to structure.

2. On the *New* tab, click *New folder*.

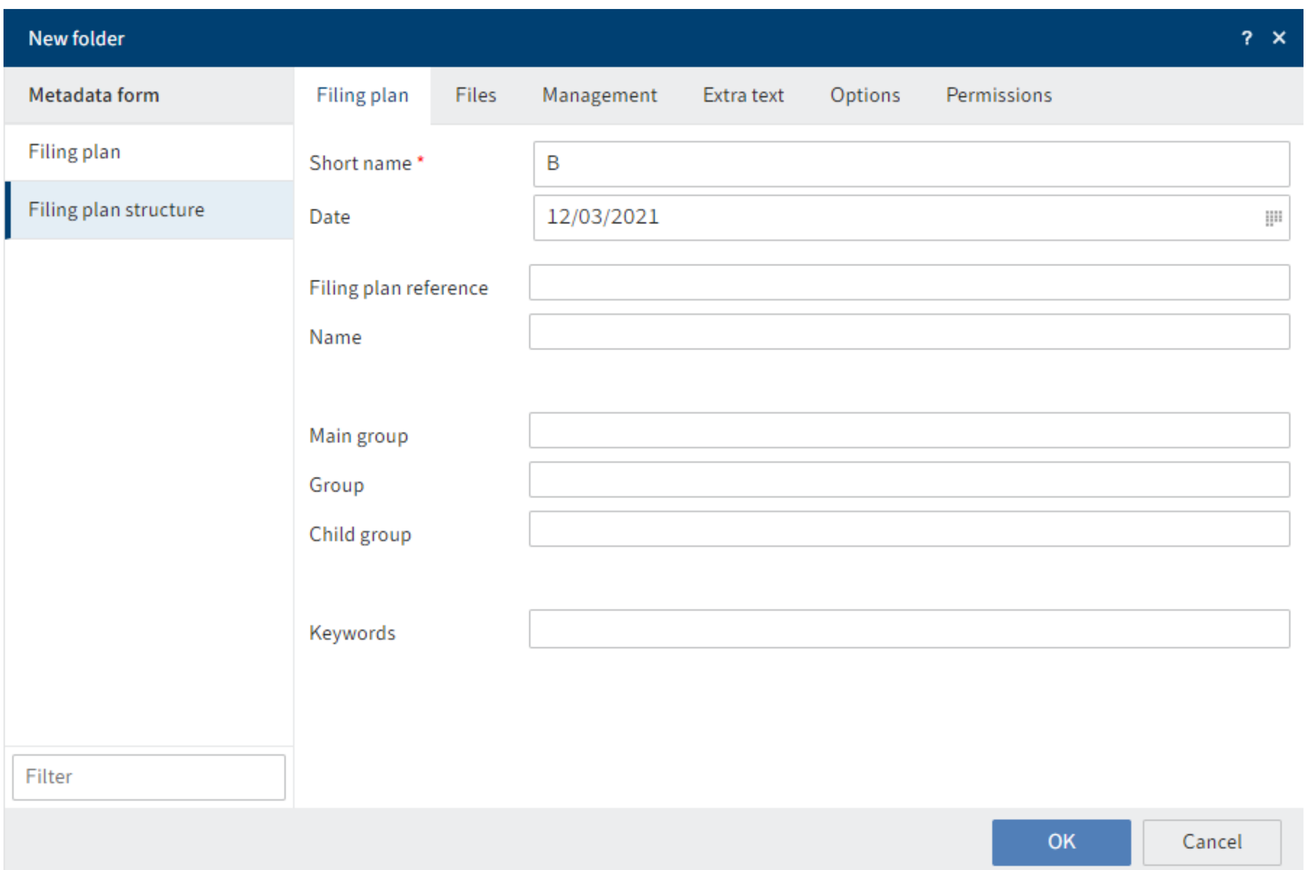


Fig.: 'New folder' dialog box, 'Filing plan structure' metadata form

1.

In the *New folder* dialog box, select the *Filing plan structure* metadata form.

As this metadata form may only be used to structure groups, all the fields on the *Filing plan* tab are disabled, with the exception of *Short name* and *Date*. The other groups are inherited from the parent group.

1. Click *OK*.

Result

The folder is created at the selected position in the filing plan.

Outlook

It can now be filled by creating files via Create file.

Export filing plan

Information

You can export a filing plan or part of a filing plan to transfer it to another ELO repository, for example.

Requirements

This function is only available in the ELO Java Client.

Method

1. Select the filing plan or the part of the filing plan you want to export.

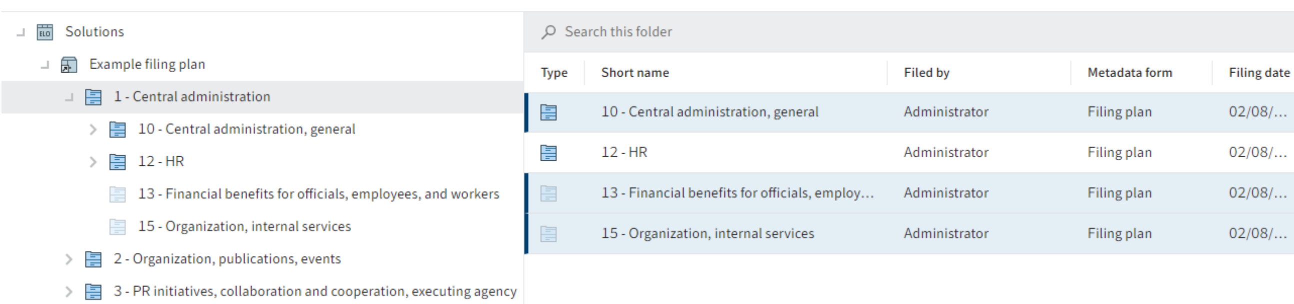


Fig.: Selected groups

To select multiple groups, select the parent group. In the table view, select the groups you want to export:

- To select multiple, specific groups, press and hold the CTRL key and click all the groups you want to select.
- To select multiple groups in a row, press the SHIFT key then click the top-most and bottom-most entry you want to select.

1. On the *Output* tab, click *Export/Import* > *Export*.

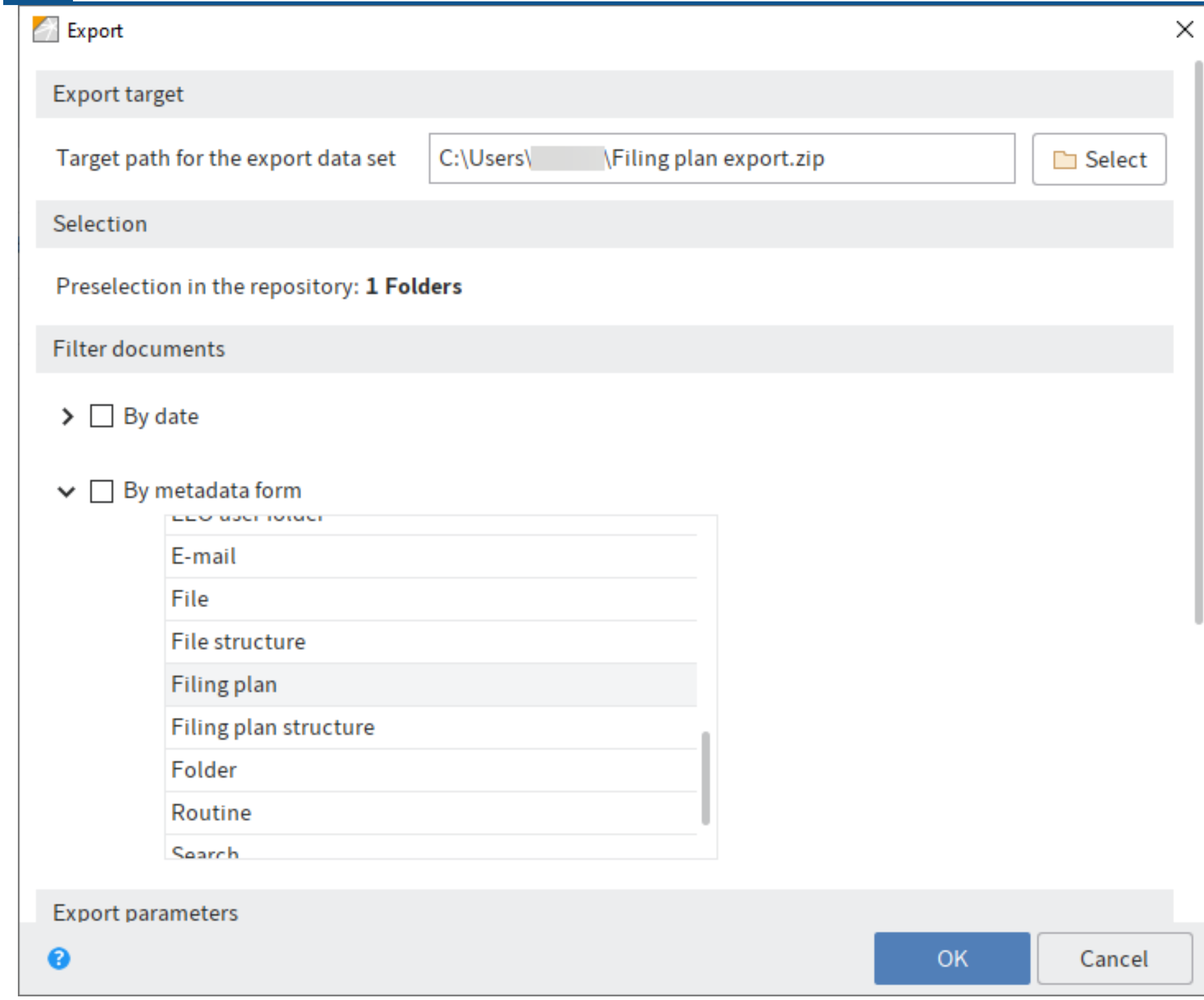


Fig.: 'Export' dialog box

1. In the *Export* dialog box, select a target path for the export.
2. To export only filing plan entries, filter for the *Filing plan* metadata form under *Filter documents > By metadata form*.
3. Click *OK*.

Result

The filing plan is saved at the selected target location as a ZIP file.

Outlook

In the ELO Java Client, you can import the filing plan to another ELO repository using the *Output > Export/import > Import* function.

Filling the filing plan

This chapter contains an overview of the functions in the *Public Sector* group on the *New* tab.

With these functions, you fill your filing plan.

Create file

Information

You can create a file in your filing plan.

Requirement

At least one permitted file type has been created by the administrator.

Method

1. In the filing plan, select the position where you want to create the file.

This position can be a file. Within a file, you have to create sub-files.

1. On the *New* tab, click *Public Sector > New file*.

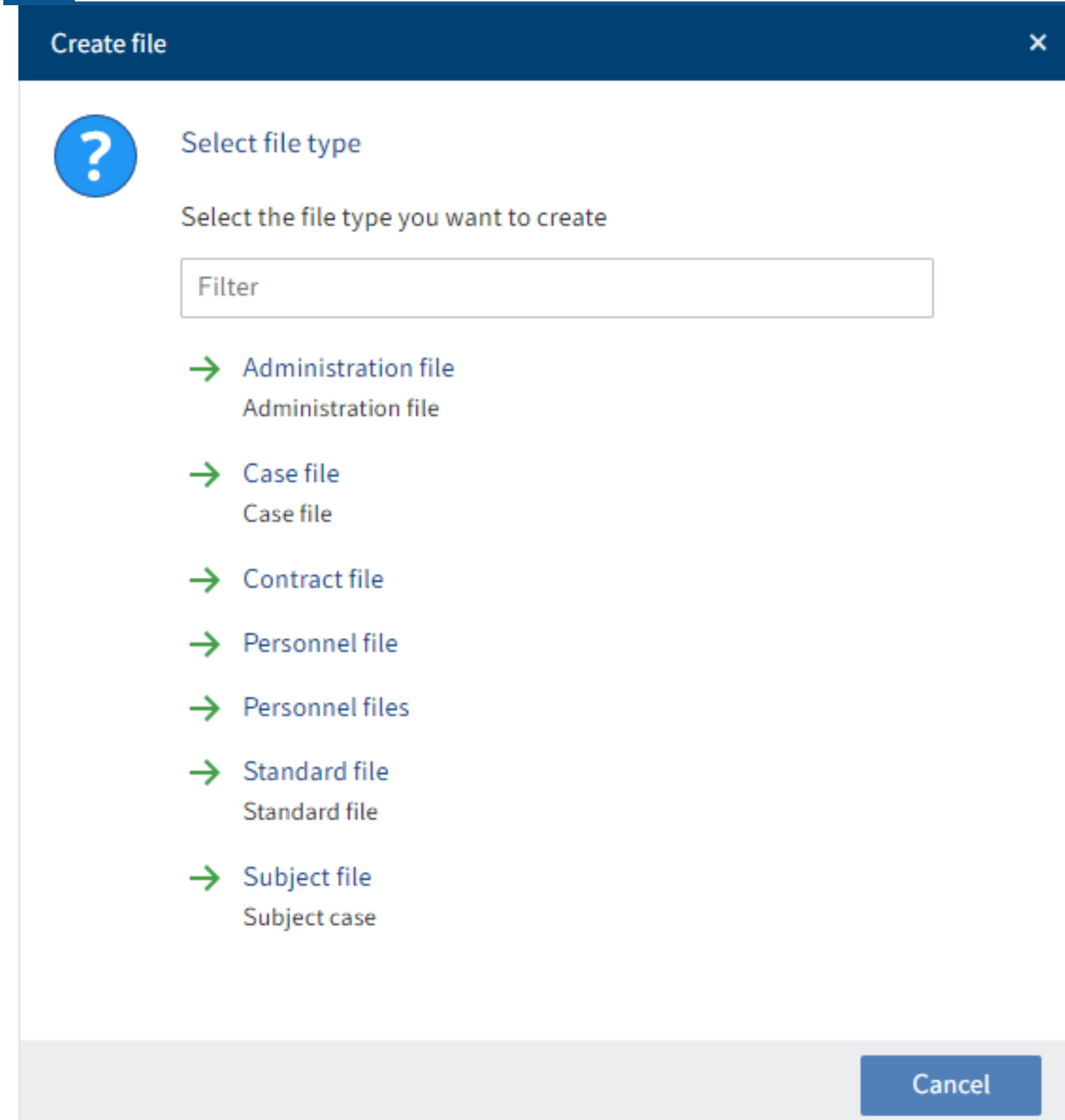


Fig.: 'Select file type' dialog box

If multiple file types are available, the *Select file type* dialog box opens.

1. Click the file type that corresponds to your file.

Information

If the overview does not contain file type you need and you do not have permission to create new file types, you can report this to your administrator with the function Request change.

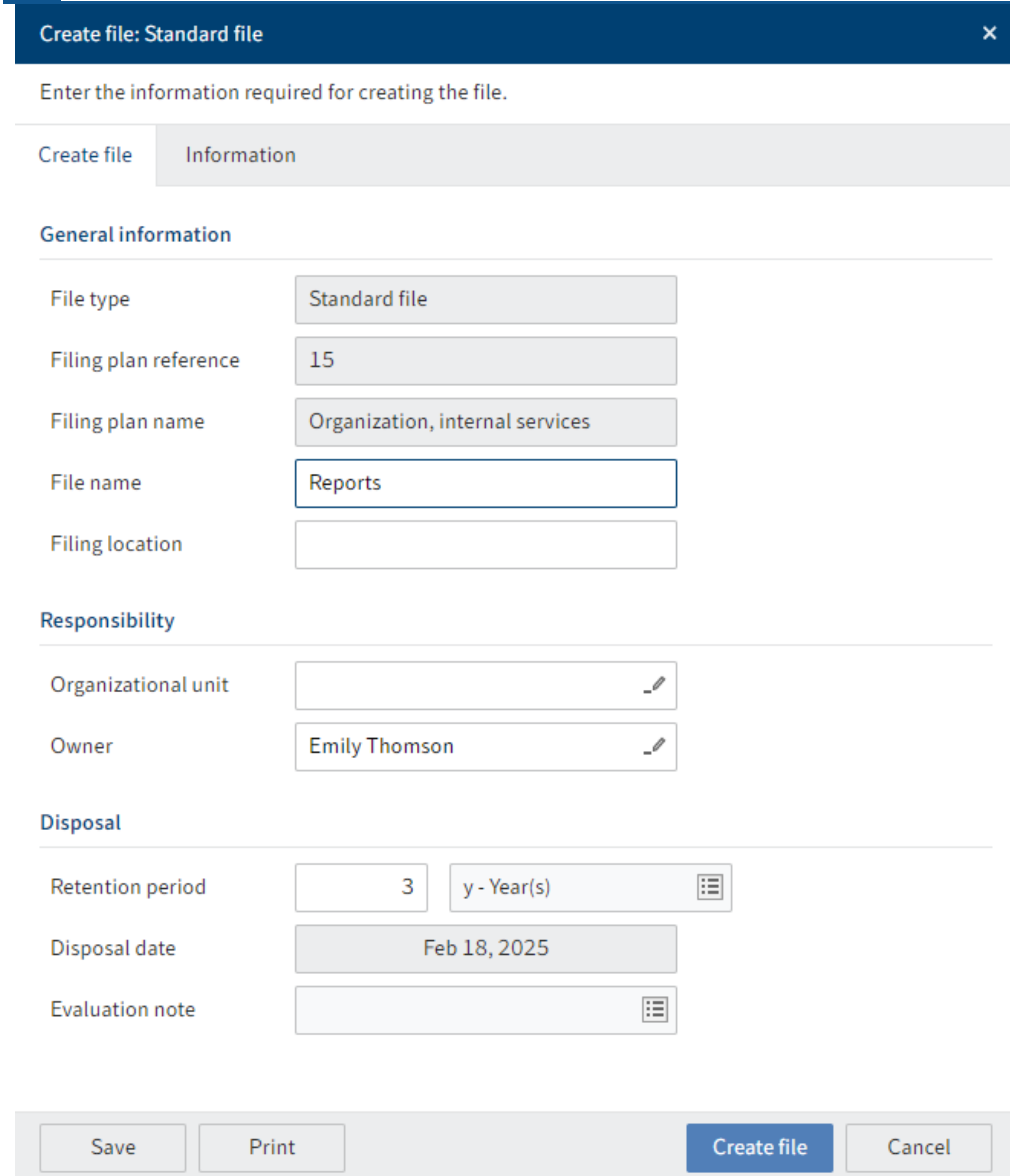


Fig.: 'Create file' dialog box

Several fields in the *Create file* dialog box will already be filled with information from the file type. These fields are grayed out.

1. Complete the other fields on the *Create file* and *Information* tabs.

2.

Click *Create file*.

Parameter

Field	Meaning
Disposal date	The disposal date is calculated automatically based on the retention date set for the group.
Filing location	You can indicate where the corresponding physical file can be found.

Result

The file is created in the selected group.

The file reference is generated automatically.

If a structure has been defined for the selected filing type, it is automatically created.

Outlook

A file in ELO Public Sector corresponds to a file in a physical filing plan and can be filled like one as well.

- Sub-files can be created within the file.
- File groups allow you to keep files over several years, for example.
- Documents can further structure the file.
- Routines can also be started right in a file.

Create sub-file

Information

You can create a sub-file for an existing file.

Requirement

At least one permitted file type has been created by the administrator.

Method

1. Select the file in the filing plan.
2. On the *New* tab, click *Public Sector > New sub-file*.

Now proceed as if you were creating a file.

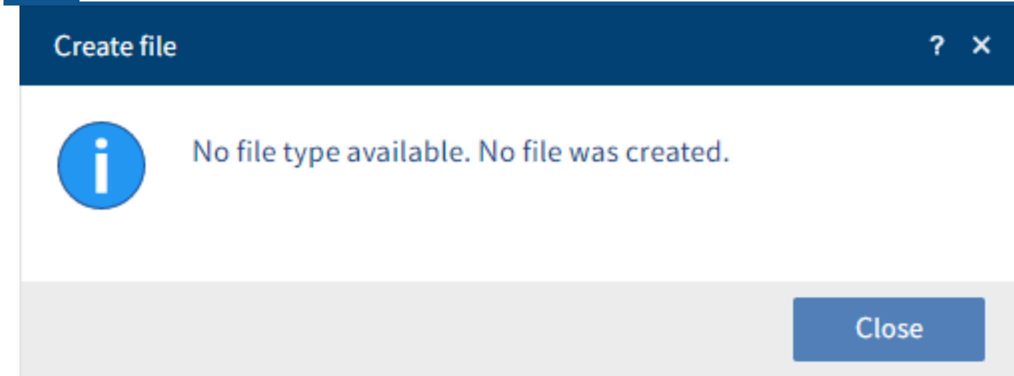


Fig.: No file type available.

If this message appears, you cannot create sub-files in the selected file. If you still want to create a sub-file, you will have to submit a change request via Request change.

Result

The sub-file is created in the selected file.

The file reference is generated automatically.

If a structure has been defined for the selected filing type, it is automatically created.

Outlook

You can treat and fill sub-files like files.

Create file group

Information

You can create a file group for an existing file, for example when a new year begins.

Requirement

The file you want to create a file group for has been closed using the Close function first.

Method

1. Select the file you want to create a file group for.
2. On the *New* tab, click *Public Sector > New file group*.

The fields in the *Create file* dialog box will already be filled with information from the previous file.

Result

The file group is created.

The file is identical to the structure of the previous file.

Create document

Information

You can create a new document.

In this case, the document is a container for multiple files and contains their metadata.

Method

1. Select the file or the case where you want to create a document.
2. On the *New* tab, click *Public Sector > New document*.

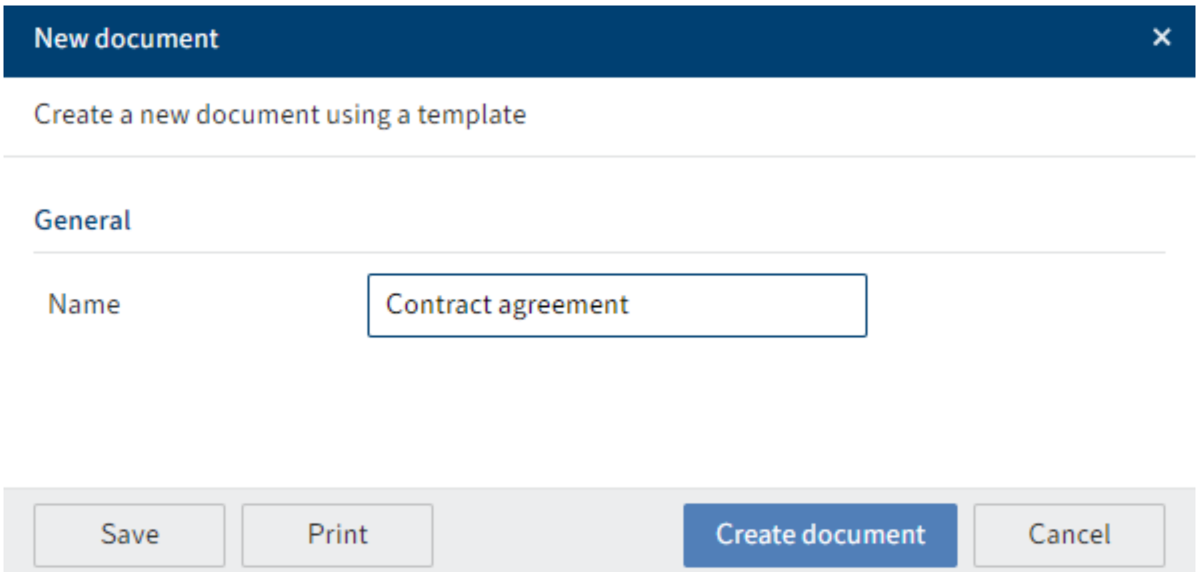


Fig.: 'New document' dialog box

1. Enter a name for the document.
2. Click *Create document*.

Result

The document is created at the selected position.

Outlook

The document can now be filled with record objects.

In the document form, you will find the fields *Name* and *Value* under *Additional information*. These fields are only relevant for the Create Word document function and are completed by administrators only.

Create case

Information

You can create a case for processing a routine.

Requirement

At least one permitted case type has been created by the administrator.

Method

1. Select the file where you want to create a case.
2. On the *New* tab, click *Public Sector > New case*.
3. If multiple case types are available, select the case type you want to create in the *Create case* dialog box.

No case type available. No case was created: If this message appears, you cannot create cases in the selected file. If you still want to create a case, you will have to submit a change request via Request change.

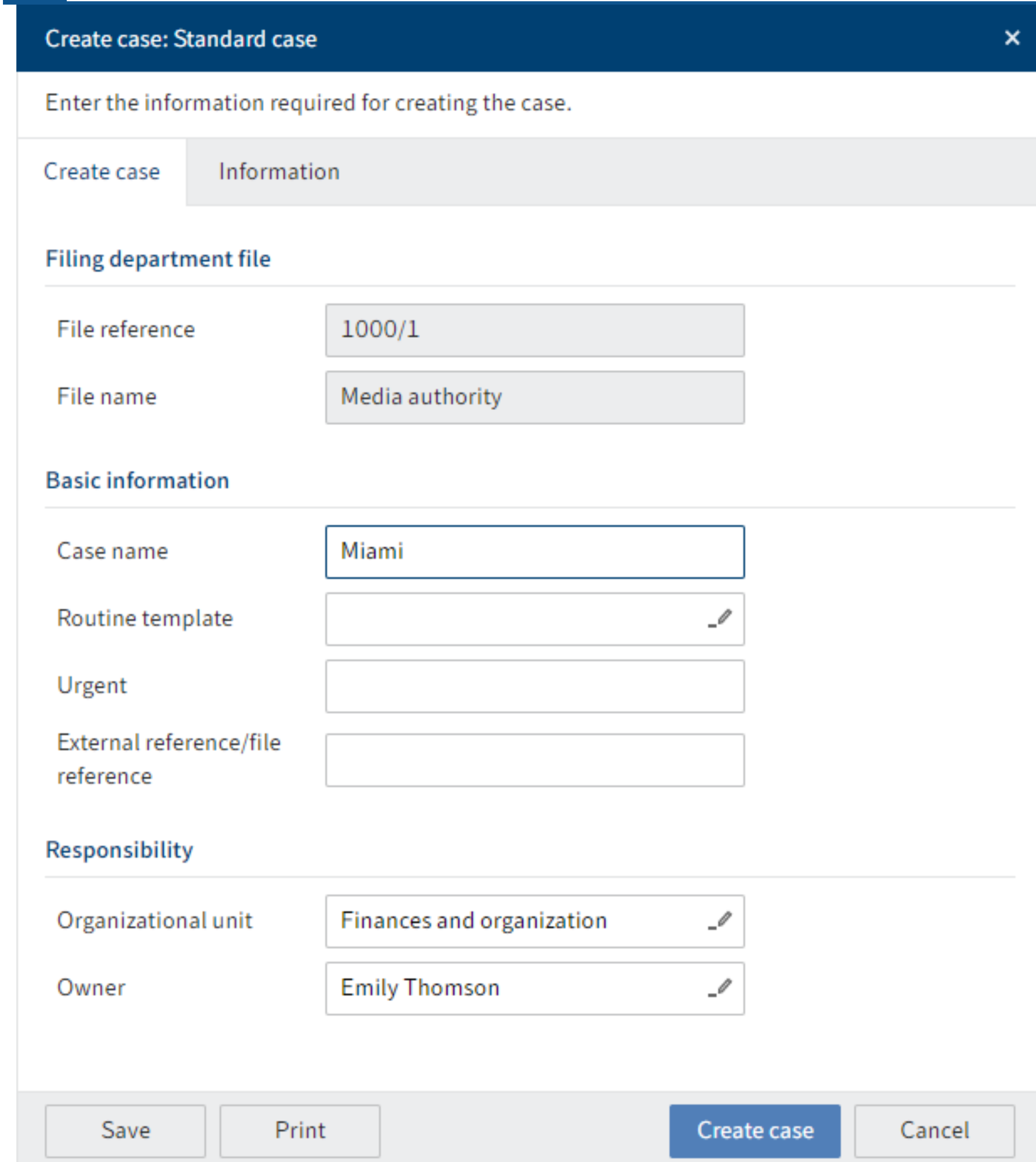


Fig.: 'Create case' dialog box

Several fields in the *Create case* dialog box will already be filled with information from the case type.

1. Complete the other fields on the *Create case* and *Information* tabs.

2. Click *Create case*.

Result

The case is created at the selected position.

Outlook

In a case, you can

- Create documents
- File record objects
- Start routines

Create circulation folder

Information

You can create a circulation folder with contents from a file or case. In addition, you can file elements within a circulation folder that are not part of your filing plan. With this circulation folder, you can start one or more routines.

Method

1. Select the file, case, or document you want to use to create a circulation folder.

To select multiple files, cases, or documents, select the parent element. In the table view, select the entries you want to reference in the circulation folder:

- To select multiple, specific entries, press and hold the CTRL key and click all the entries you want to select.
- To select multiple entries in a row, press the SHIFT key then click the top-most and bottom-most entry you want to select.

1. On the *New* tab, click *Public Sector > New circulation folder*.

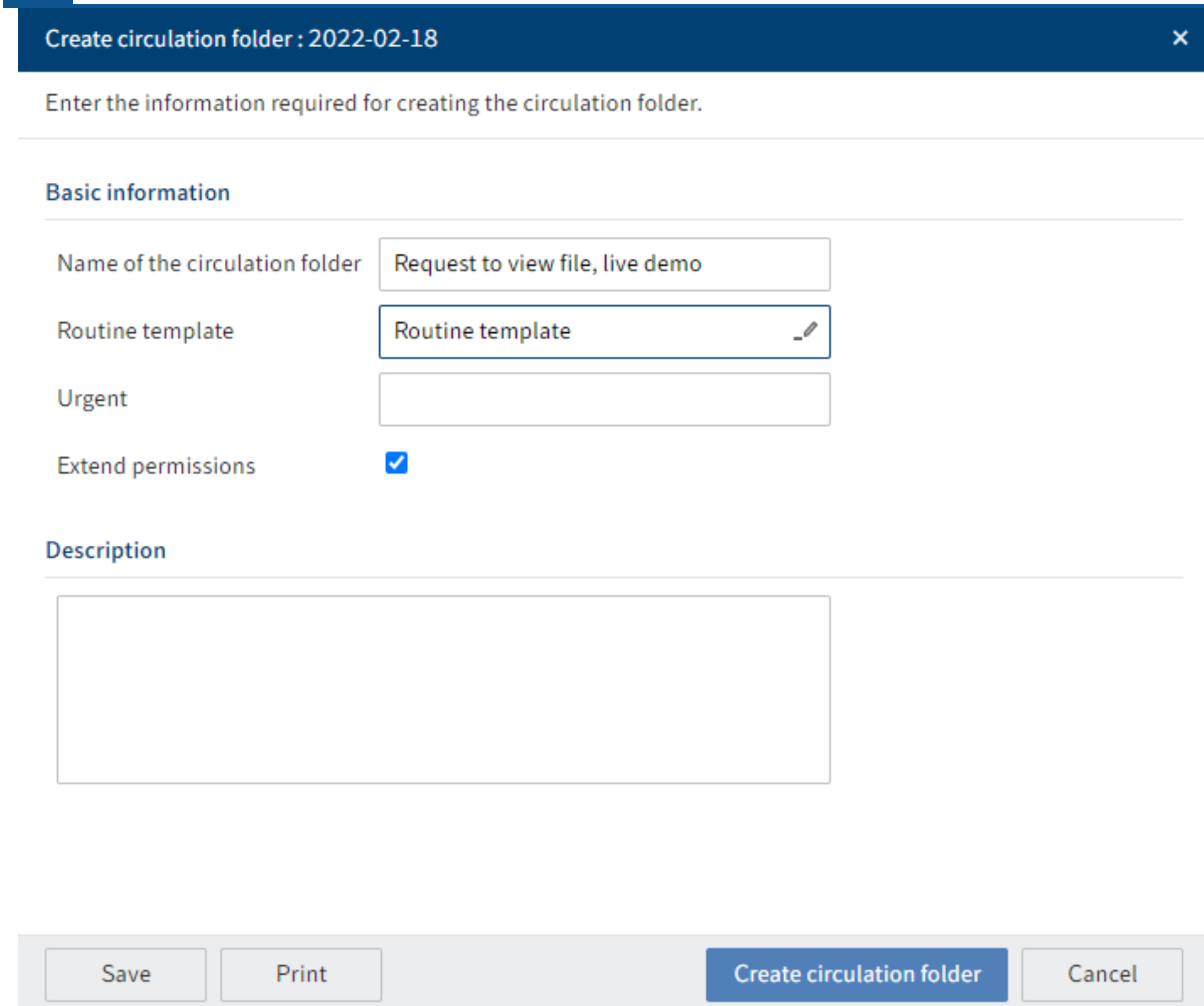


Fig.: 'Create circulation folder' dialog box

1. Complete the fields as required.
2. Click *Create circulation folder*.

Parameter

Field	**Meaning**
Routine template	You can select a routine that has already been defined. You can change the routine before starting it if necessary. You can also leave the field blank and define a custom routine after creating the circulation folder.
Extend permissions	Users without permission to the contents of a circulation folder will only see the circulation folder and not its contents. If you check this box, they will also see the contents.

Result

The circulation folder is created in the *Circulation folders* folder, which is not part of the filing plan.

The selected elements are referenced in the circulation folder. As a result, the circulation folder always contains the latest versions.

Outlook

Now that you have created a circulation folder, you have to start the routine.

Change filing plan

This chapter contains an overview of the functions in the *Edit* group on the *Public Sector* tab.

With these functions, you can make changes to the filing plan and/or the files. If you have the necessary permissions, the changes are applied immediately. If you do not have the necessary permissions, you can submit a change request using the relevant function.

Close

Information

You can close a file or case.

> **Information**
>
> If you do not see the *Close* button, you can submit a change request via Request change.

Method

1. Select the file or case you want to close.

To select multiple files/cases, select the parent group. In the table view, select the files/cases you want to close:

- To select multiple, specific files/cases, press and hold the CTRL key and click all the files/ cases you want to select.
- To select multiple files/cases in a row, press the SHIFT key then click the top-most and bottom-most entry you want to select.

1. On the *Public Sector* tab, click *Close*.

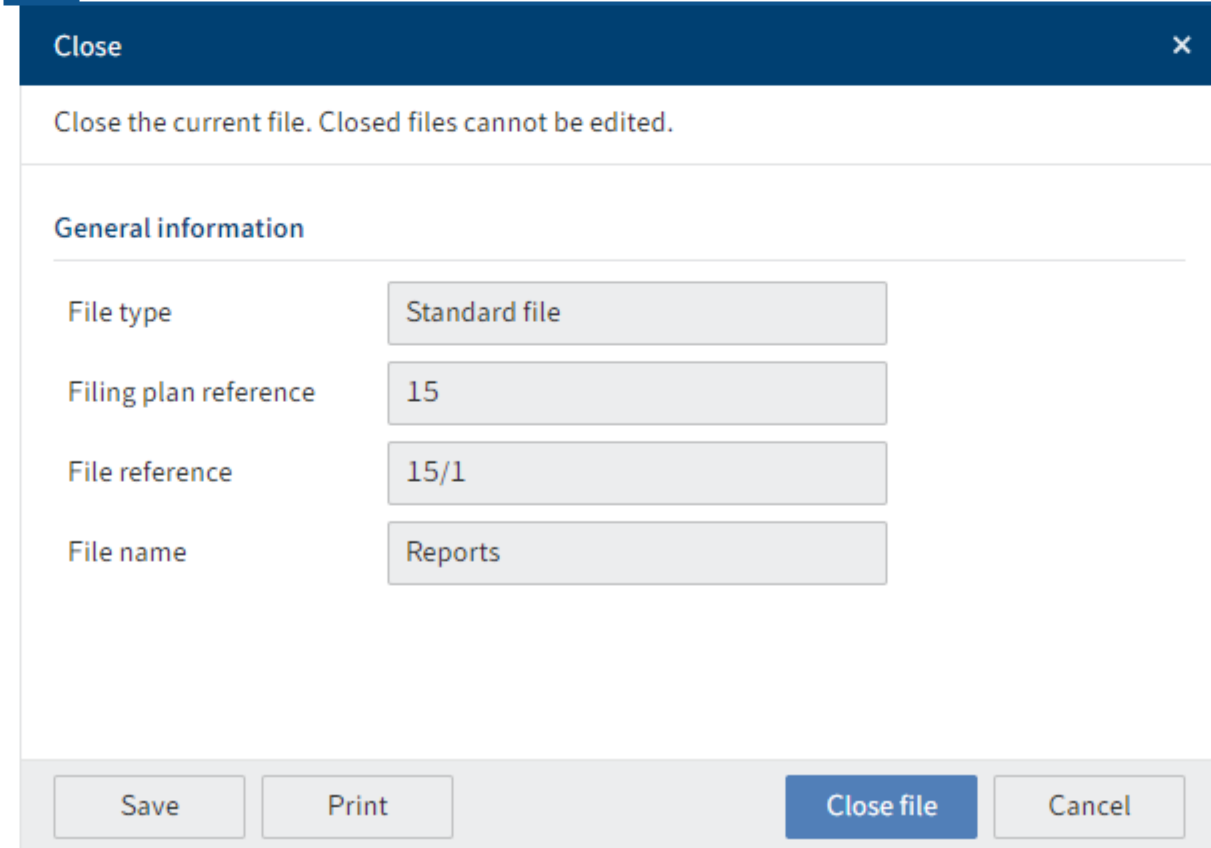


Fig.: 'Close' dialog box

1. Click *Close file*.

Result

Closed files/cases cannot be edited. However, they are still visible in the filing plan.

Outlook

- A closed file or case can be re-opened using the Open function.
- A closed file or case can be deleted using the Delete function.
- You can create a file group for a closed file.

Delete

Information

You can delete a file or case.

> **Information**
>
> If you do not see the *Delete* button, you can submit a change request via Request change.

Requirement

The case has to be closed with the Close function first.

Method

1. Select the file or case you want to delete.

To select multiple files/cases, select the parent group. In the table view, select the files/cases you want to delete:

- To select multiple, specific files/cases, press and hold the CTRL key and click all the files/ cases you want to select.
- To select multiple files/cases in a row, press the SHIFT key then click the top-most and bottom-most entry you want to select.

1. On the *Public Sector* tab, click *Delete*.

Result

Deleted files/cases are no longer visible in the filing plan.

> **Please note**
>
> This only assigns files a deletion marker, and does not delete them permanently. Deleted entries have to be removed from ELO permanently by an administrator. They can be restored until the point at which they are permanently deleted.

Reclassify file

Information

You can move a file to another position within the filing plan.

> **Information**
>
> If you do not see the *Reclassify file* button, you can submit a change request via Request change.

Method

1. Select the file you want to reclassify.

2. On the *Public Sector* tab, click *Edit > Reclassify file*.

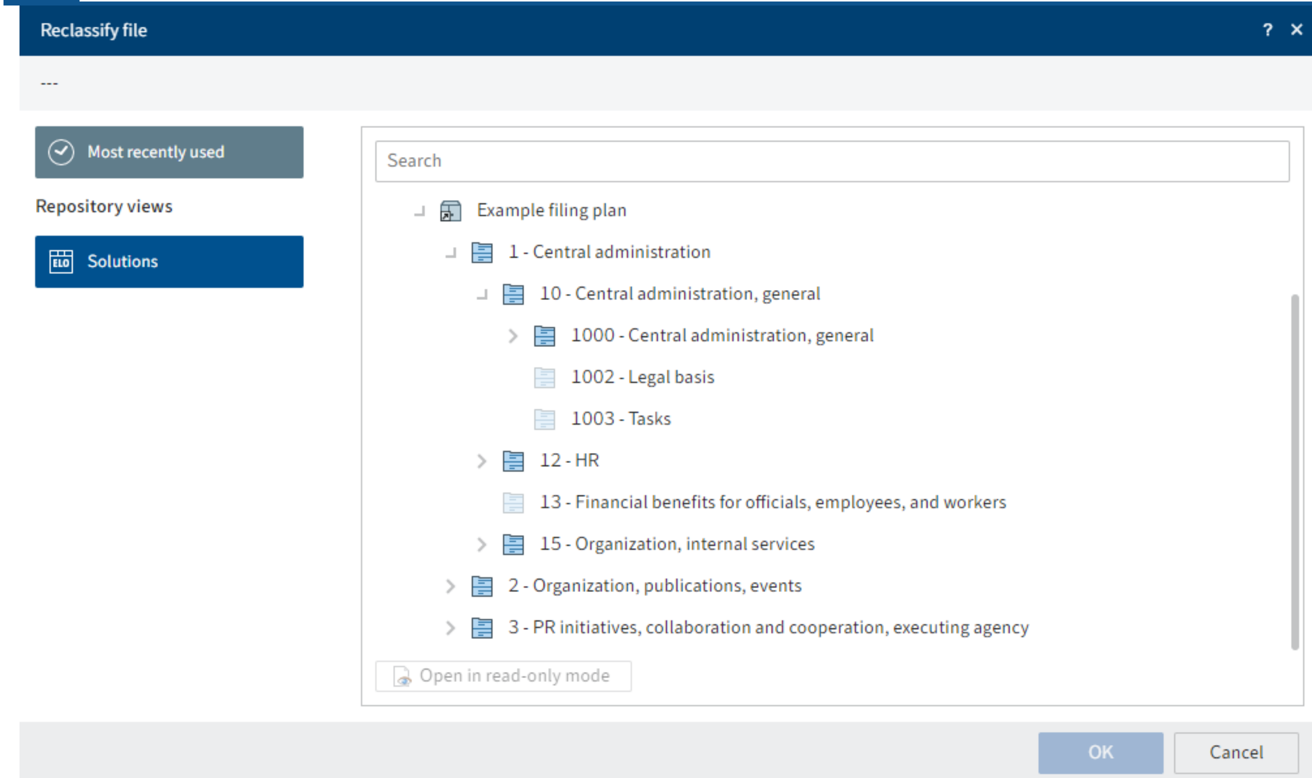


Fig.: 'Reclassify file' dialog box

1. In the *Reclassify file* dialog box, select the target position for the file.
2. Click *OK*.

Result

You will now find the file at the position you have selected.

The file reference and any derived references within the file are automatically adapted to the new position.

> **Please note**
>
> Do not move files using the standard *Start > Move* function, as this does not reclassify the file reference. If you have already moved a file with the *Move* function, you can move it back to its original location in the same way and then use the *Reclassify file* function.

Open

Information

You can re-open a closed file or case.

> **Information**

> If you do not see the *Open* button, you can submit a change request via Request change.

Method

1. Select the file or case you want to open.

To select multiple files/cases, select the parent group. In the table view, select the files/cases you want to open:

- To select multiple, specific files/cases, press and hold the CTRL key and click all the files/cases you want to select.
- To select multiple files/cases in a row, press the SHIFT key then click the top-most and bottom-most entry you want to select.

1. On the *Public Sector* tab, click *Open*.

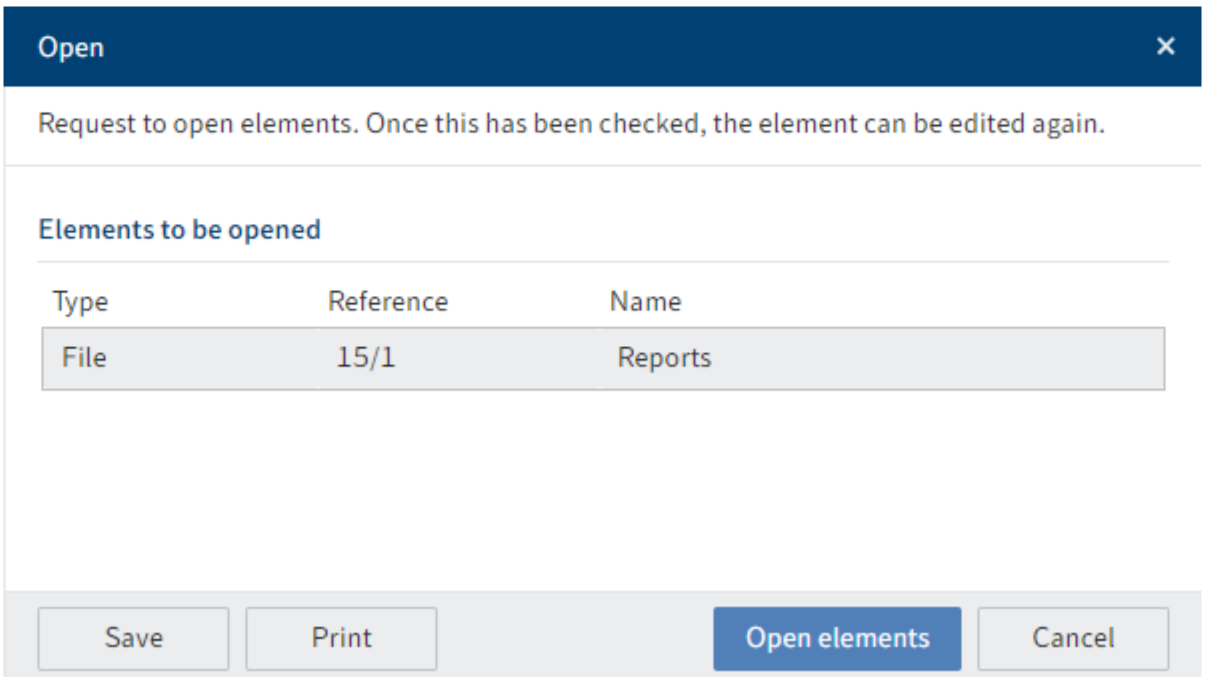


Fig.: 'Open' dialog box

1. Click *Open elements*.

Result

The file or the case is open again and can be edited. If you don't have permission to open the file, a request is submitted to open it.

Restriction note

Information

You can set a restriction note for a file whose projects are currently on hold.

Information

If you do not see the *Restriction note* button, you can submit a change request via Request change.

Method

1. Select the file you want to lock.
2. On the *Public Sector* tab, click *Restriction note*.

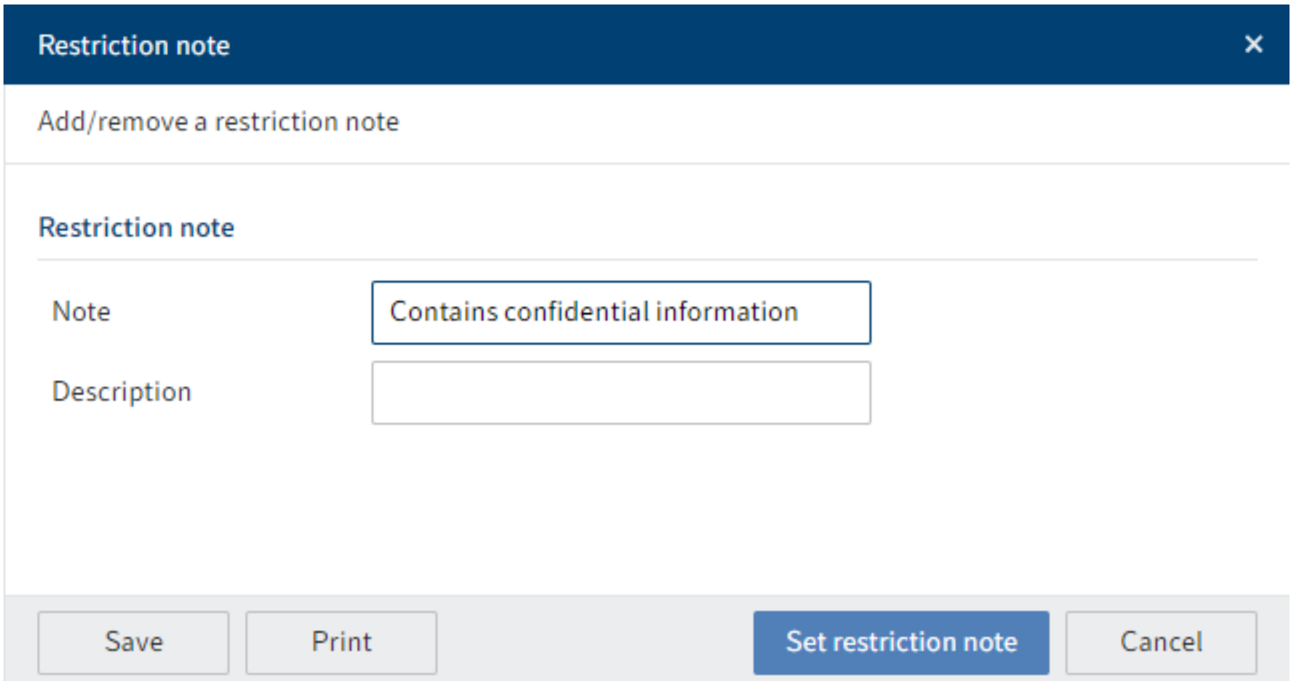


Fig.:'Restriction note' dialog box

1. Enter a restriction note.
2. Click *Set restriction note*.

Result

Files with restriction notes are shown in a yellow font in the repository. Your entries in the *Restriction note* dialog box are visible to other users in the feed.

Outlook

A locked file can be unlocked using the *Restriction note* function.

Request change

Information

You can request changes in a filing plan if you don't have the rights to make changes yourself.

Method

1. In the filing plan, select the position where you want to request a change.

The editor of the request sees which file/group in the filing plan is selected while you submit the request.

1. On the *Public Sector* tab, click *Request change*.

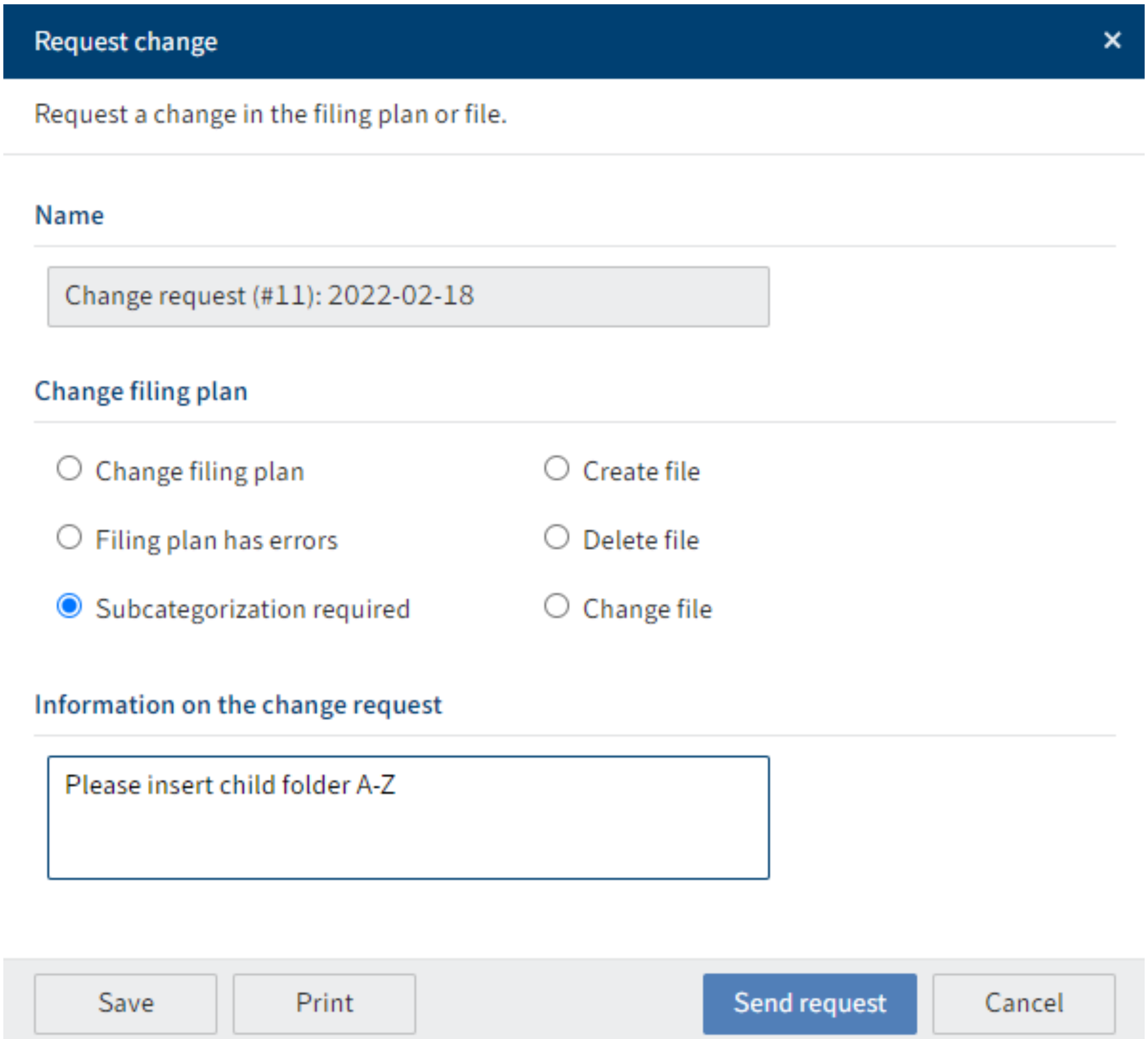


Fig.: 'Request change' dialog box

1. Enter your change request in the *Request change* dialog box.

If none of these options apply, you can also simply fill out the text field under *Information on the change request*.

1. Click *Send request*.

Result

The change request is forwarded to a user with the corresponding rights. This user can either reject the request or carry out the changes.

Processes

Start signature

Information

You can start the signing process separate from an existing routine.

If you want to start signing as part of a routine, you can start the function from within your Tasks work area. With the corresponding task open, click *Public Sector*.

Method

1. Select the entry you want to start a signature for.

2. On the *Public Sector* tab, click *Start signature*.

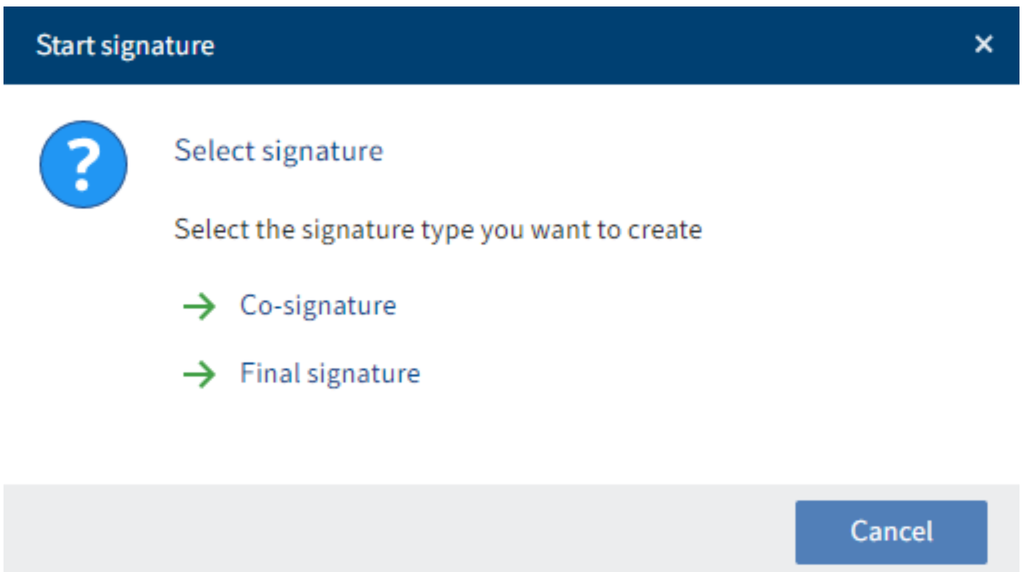


Fig.: 'Select signature' dialog box

1. If multiple signature types are configured, select the desired signature type in the *Select signature* dialog box.

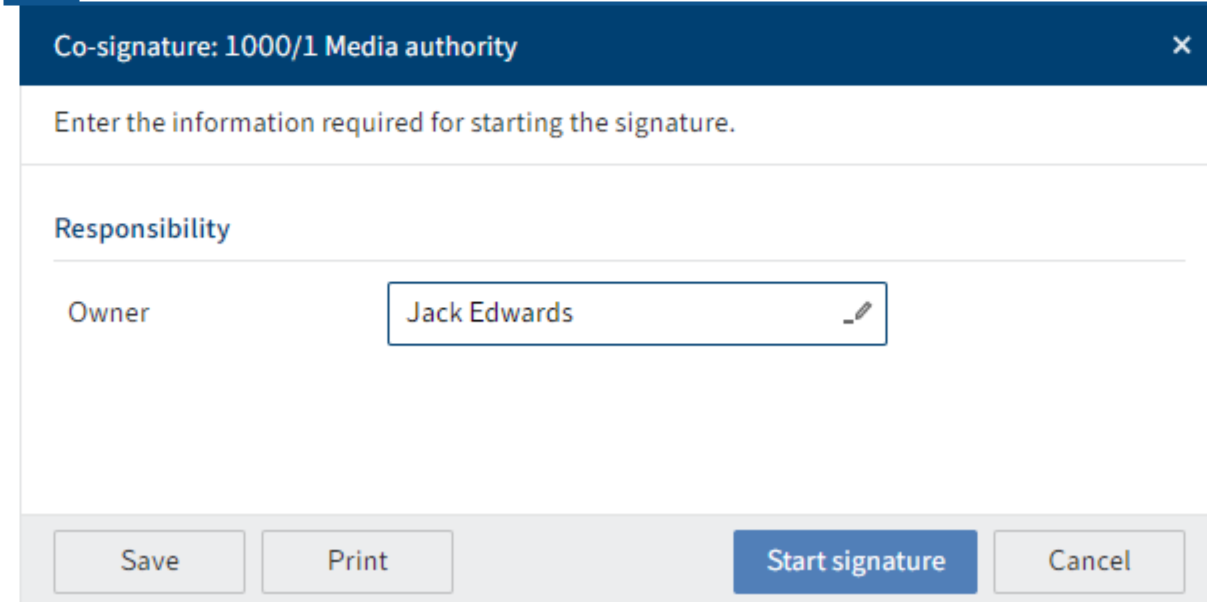


Fig.: 'Start signature' dialog box

1. In the *Start signature* dialog box, select a user or group as the recipient under *Owner*. Suggestions will appear as you begin to type.

2. Click *Start signature*.

Result

The selected recipient receives a task in their Tasks work area.

Outlook

Once the recipient has signed, you will see this action and, if applicable, a comment in the feed.

Sign

Information

If you are assigned a signature task, you will find it in your Tasks work area.

Method

1. Select the task in your Tasks work area.

Optional: Click *Accept workflow* if you received the workflow as a member of a group.

1. On the *Task* tab, click *Forward workflow*.

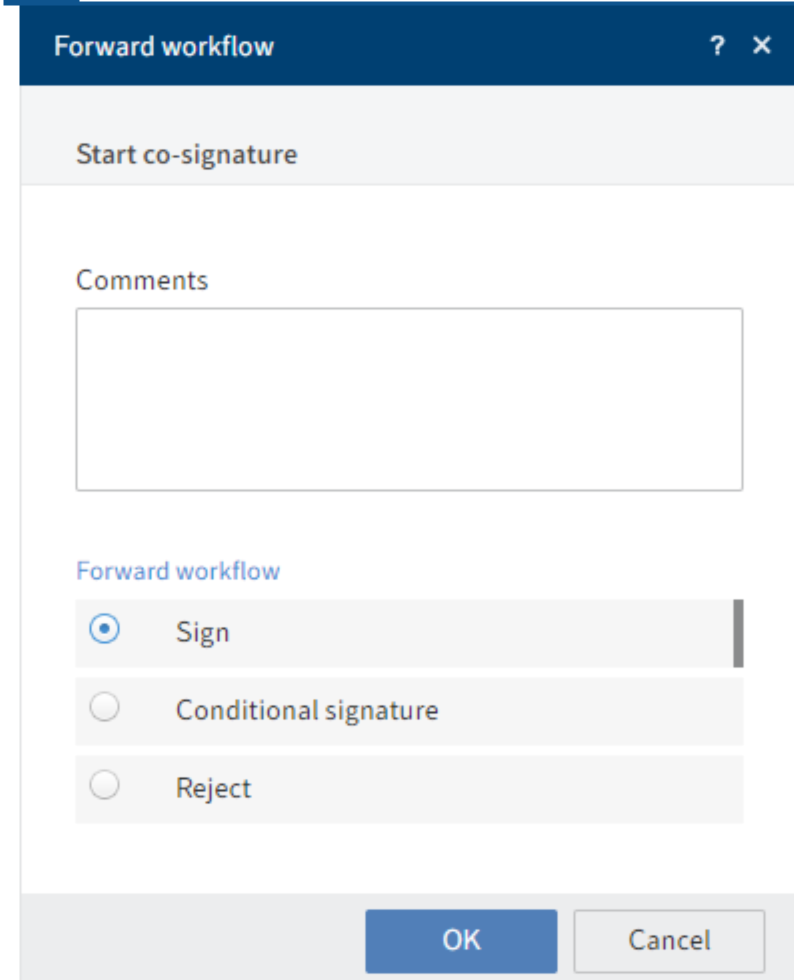


Fig.: 'Forward workflow' dialog box

1. In the *Forward workflow* dialog box, select how you want to forward the workflow.

2. Click *OK*.

Result

The workflow disappears from your tasks area. The signature is visible as a comment.

Start directive

Information

You can start a directive separate from an existing routine.

If you want to start a directive as part of a routine, you can start the function from within your Tasks work area. With the corresponding task open, click *Public Sector*.

Method

1. Select the entry you want to start a directive for.

2.

On the *Public Sector* tab, click *Start directive*.

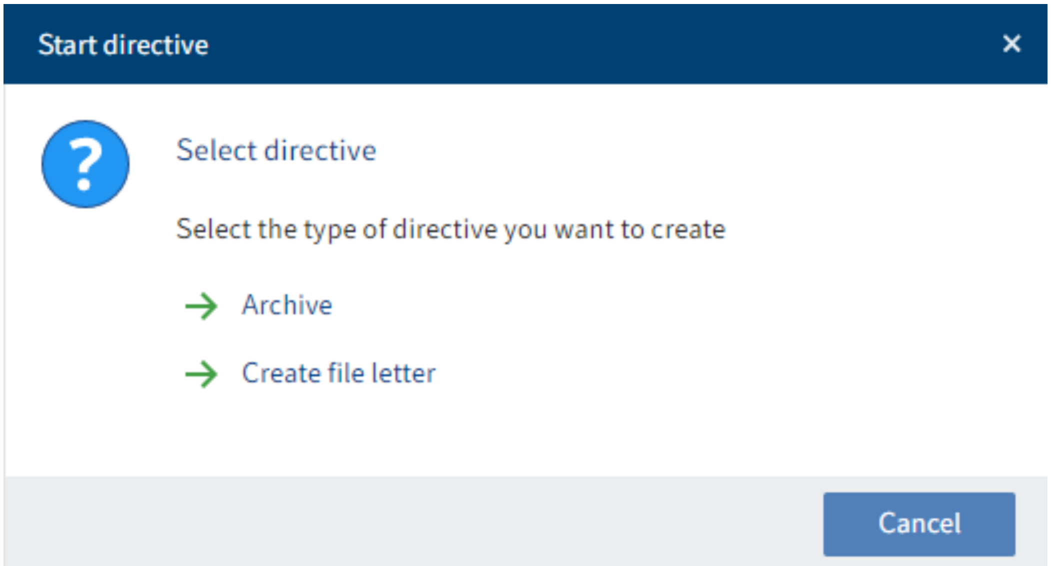


Fig.: 'Select directive' dialog box

1. If multiple directive types are configured, select the desired directive type in the *Select directive* dialog box.

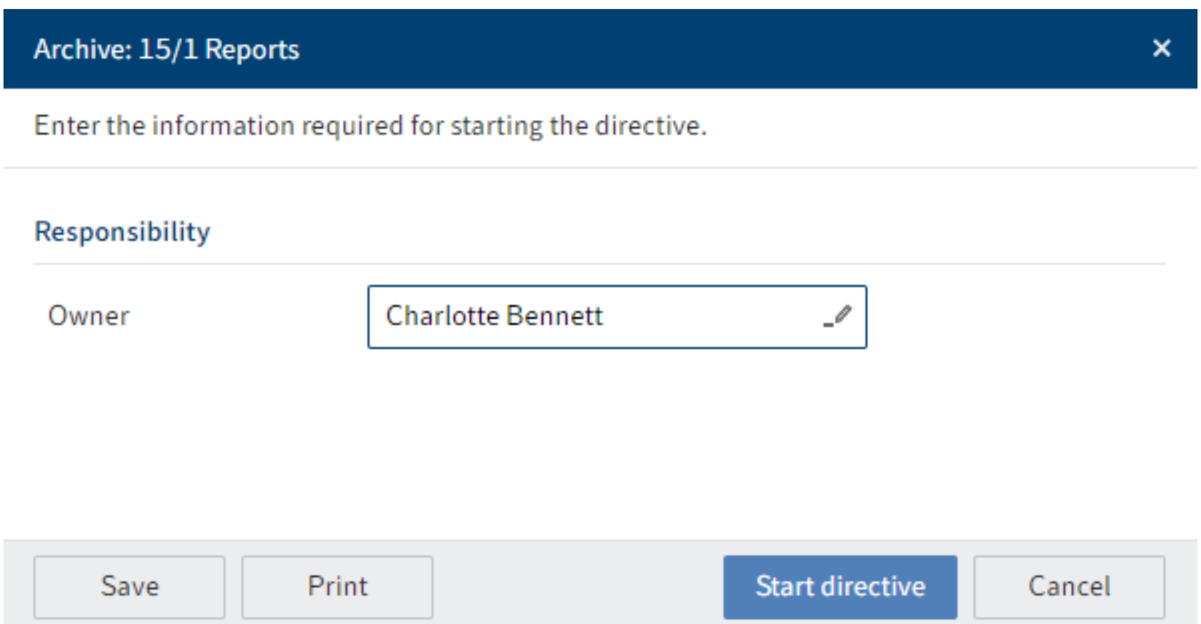


Fig.: 'Start directive' dialog box

1. In the *Start directive* dialog box, select a user or group as the recipient under *Owner*. Suggestions will appear as you begin to type.

2. Click *Start directive*.

Result

The selected recipient receives a task in their Tasks work area.

Outlook

Once the recipient has completed the directive, you will see this action and, if applicable, a comment in the feed.

Run directive

Information

If you are assigned a directive, you will find it in your Tasks work area.

Method

1. Select the task in your Tasks work area.

Optional: Click *Accept workflow* if you received the workflow as a member of a group.

1. On the *Task* tab, click *Forward workflow*.

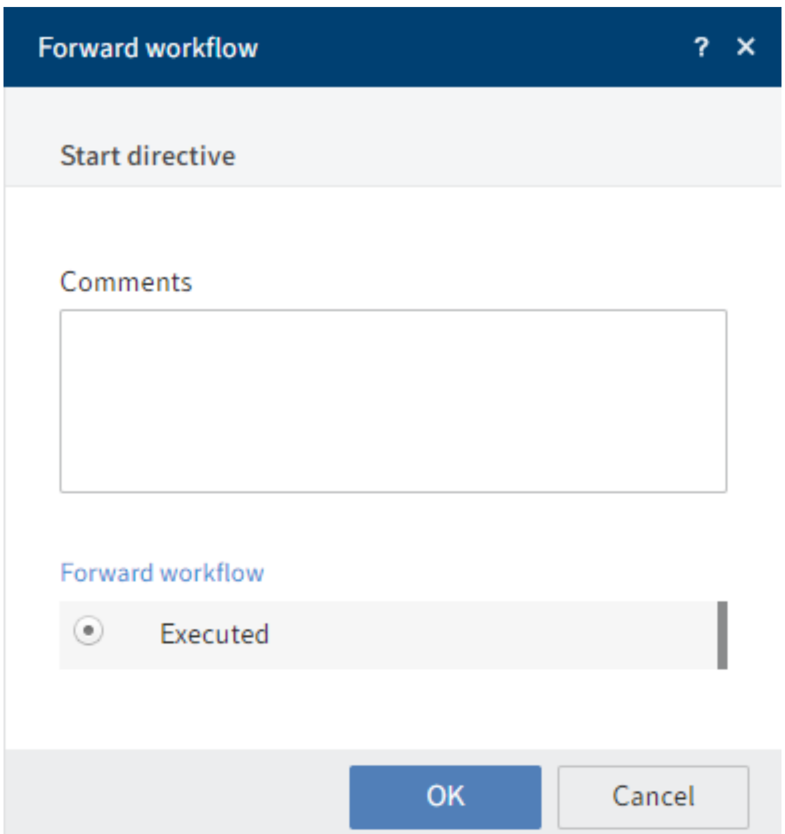


Fig.: 'Forward workflow' dialog box

1. In the the *Forward workflow* dialog box, click *OK*.

Result

The workflow disappears from your tasks area. The directive is visible as a comment.

Generating reports

This chapter contains an overview of the reports you can create.

Reports help you keep an overview of your filing plan. You can use these functions to create PDF documents that are filed to a location you have selected.

Create file report

Information

You can create an overview for a selected file. The report contains information on the file as well as a QR code. The report contains all cases with their statuses, as well as documents and record objects that are part of the file.

Method

1. Select the file you want to create a report for.

2. On the *Public Sector* tab, click *Report > Create file report*.

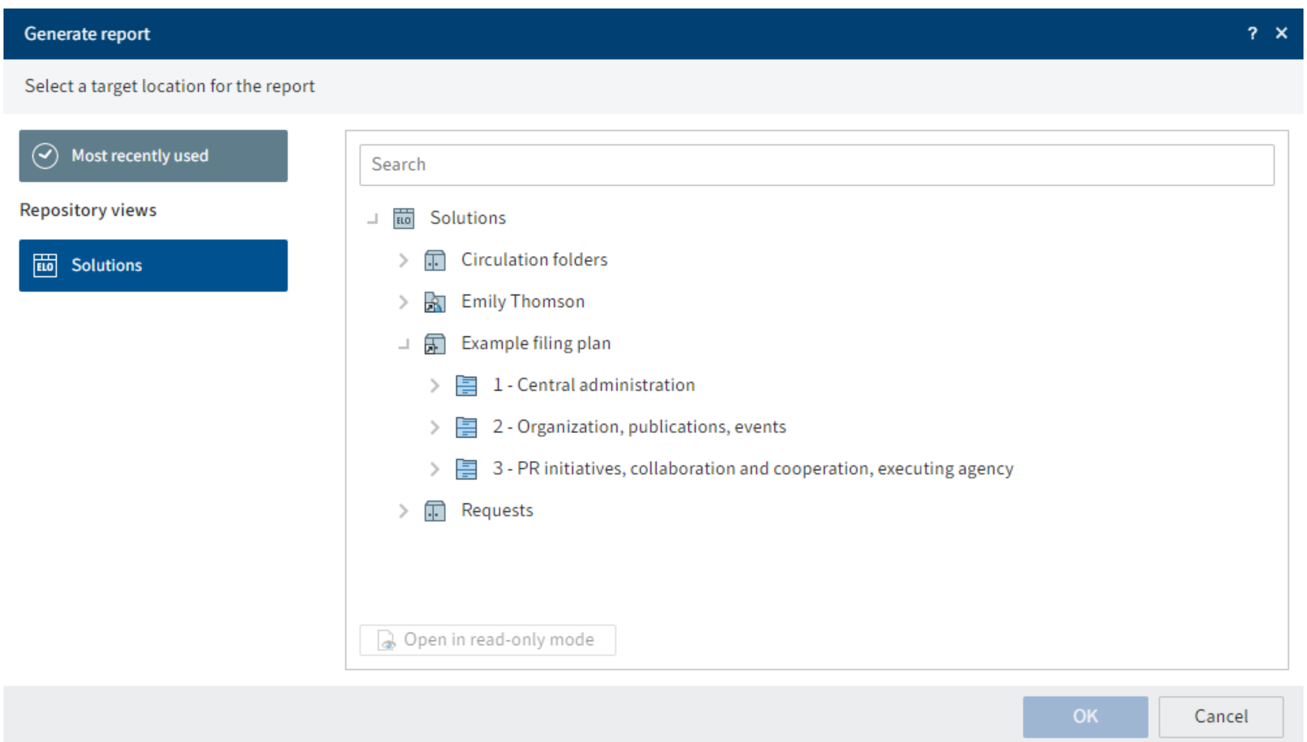


Fig.: 'Generate report' dialog box

1. In the *Generate report* dialog box, select a location where you want to file the report.

2. Click *OK*.

Result

The report is filed as a PDF at the selected target position.

Outlook

If you print the report and file it to a physical file, mobile end devices will take you straight to the digital file by scanning the QR code.

Create file overview

Information

You can create an overview of the files in the selected group of the filing plan.

Method

1. Select the group you want to create a report for.
2. On the *Public Sector* tab, click *Report > Create file overview*.
3. In the *Select template* dialog box, select the desired template.

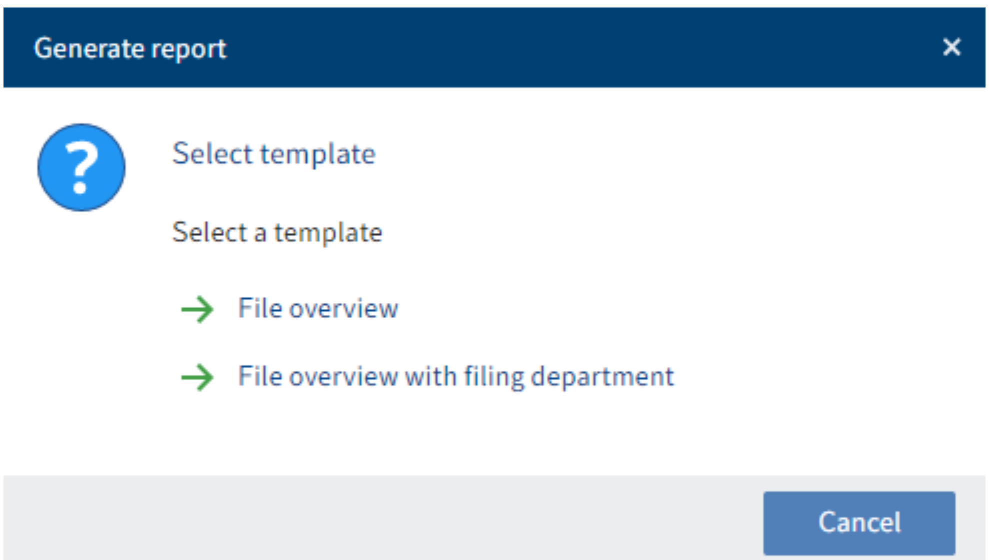


Fig.: 'Select template' dialog box

You have the following options:

- File overview: The file overview contains the name of the selected group as well as the file references and the names of the files.
- File overview with filing department: The file overview contains the name of the selected group as well as the file references and the names of the files. It also contains additional information on the files.

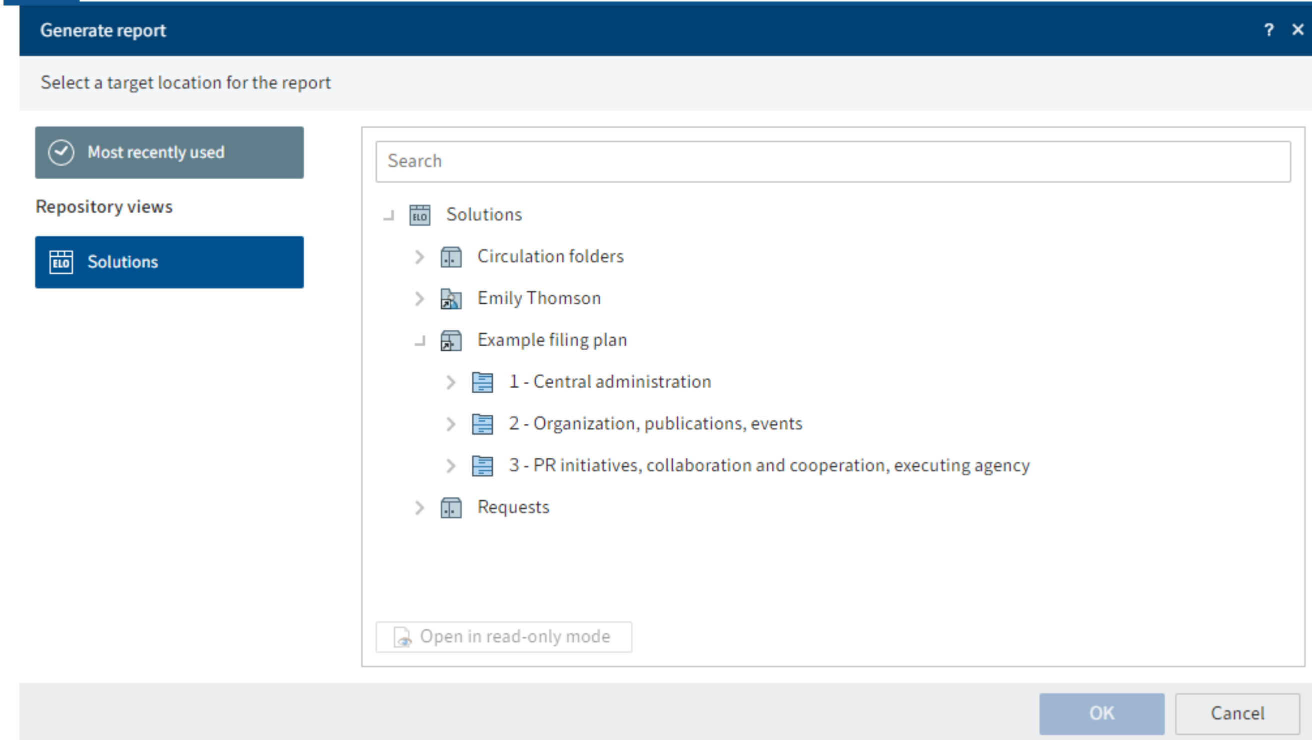


Fig.: 'Generate report' dialog box

1. In the *Generate report* dialog box, select a location where you want to file the report.
2. Click *OK*.

Result

The report is filed as a PDF at the selected target position.

Create filing plan

Information

You can create an overview for the selected filing plan or sub-filing plan.

Method

1. Select the filing plan or the group you want to create a report for.
2. On the *Public Sector* tab, click *Report > Create filing plan*.

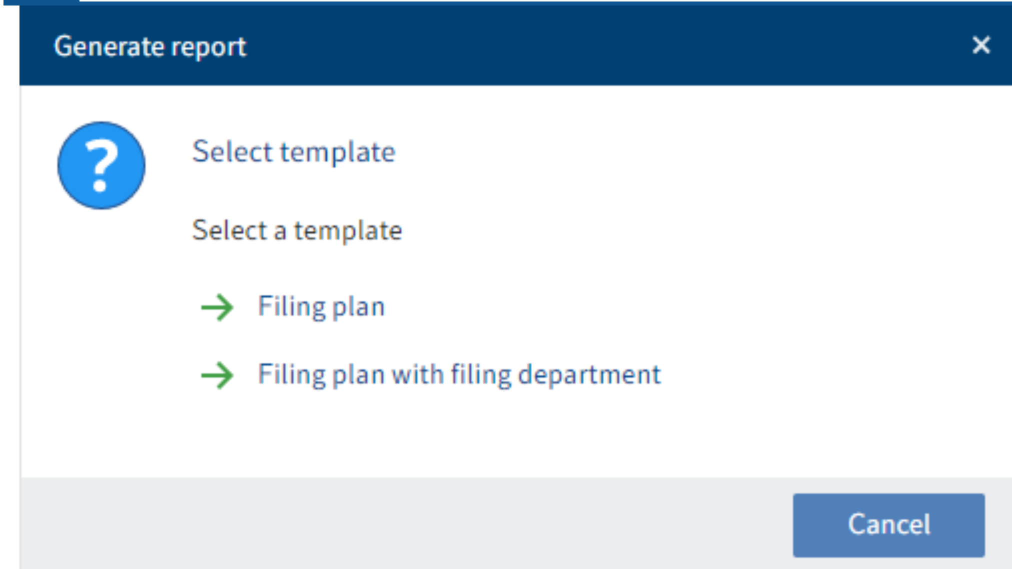


Fig.: 'Select template' dialog box

1. In the *Select template* dialog box, select the desired template.

You have the following options:

- Filing plan: The filing plan overview contains the name of the selected group as well as all groups within this group.
- Filing plan with filing department: The filing plan overview contains the name of the selected group as well as all groups within this group. It also contains additional information on the groups, e.g. what file types may be created in the group.

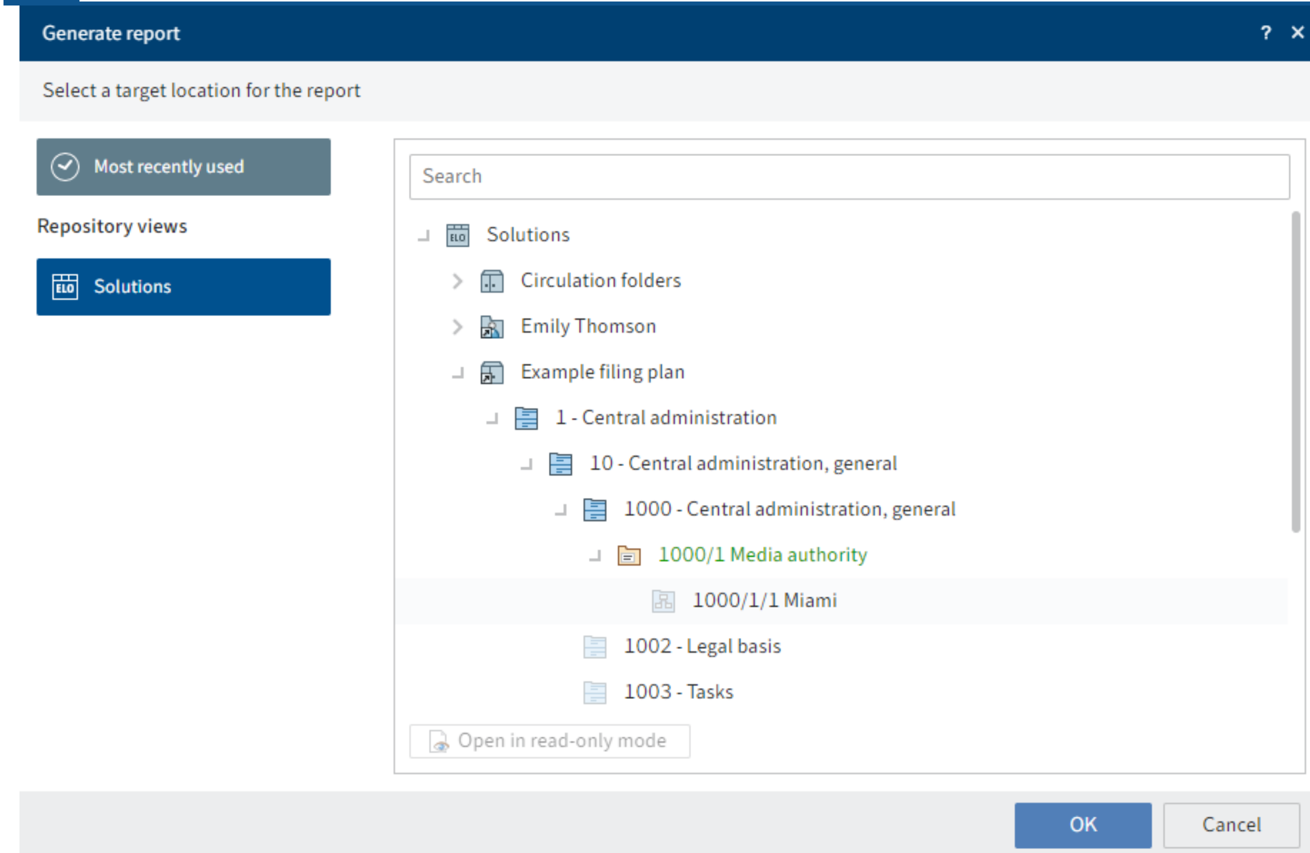


Fig.: 'Generate report' dialog box

1. In the *Generate report* dialog box, select a location where you want to file the report.
2. Click *OK*.

Result

The report is filed as a PDF at the selected target position.

Automatically generating record objects

With the functions

- Create Word document
- Create cover sheet
- Create label

you can automatically generate documents with information from your filing plan.

Create Word document

Information

You can generate a record object for the selected file/case. The record object automatically contains information on the file/case.

This function is useful for creating text templates for fines, for example. Custom, preconfigured information for the file is added to the text template.

Method

1. Select the entry you want to generate a record object for.
2. On the *Public Sector* tab, click *Create Word document*.

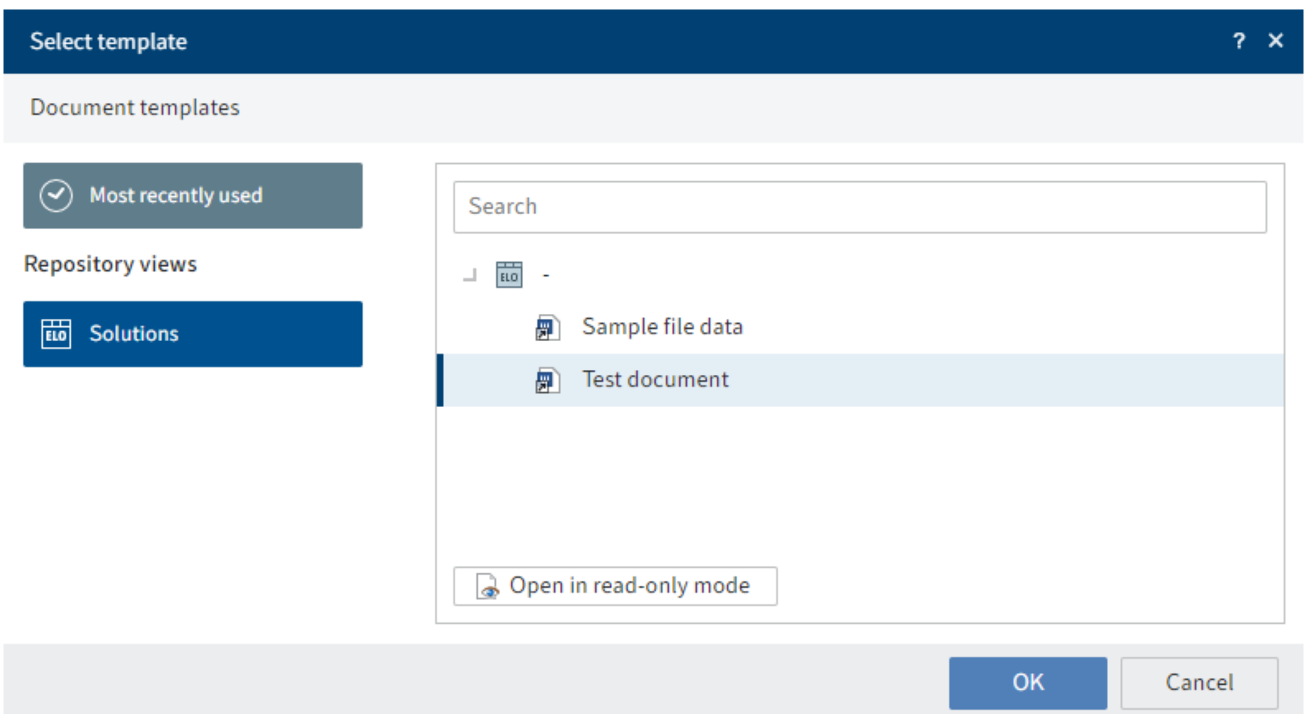


Fig.: 'Select template' dialog box

1. In the *Select template* dialog box, select the document template.
2.

Click *OK*.

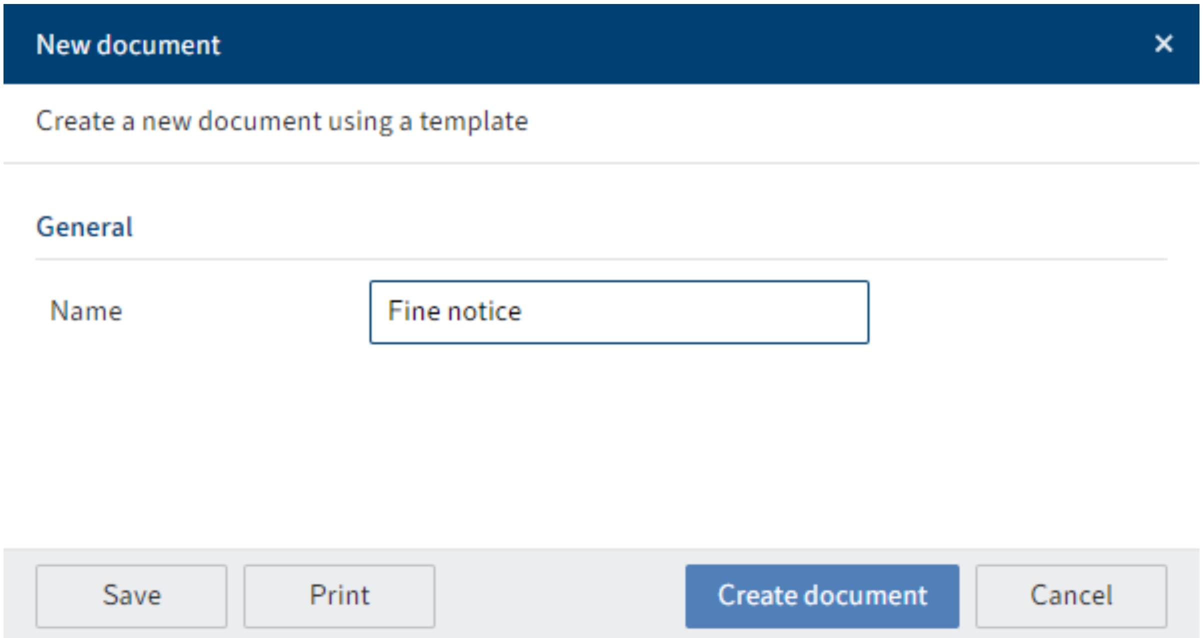


Fig.: 'New document' dialog box

1. Enter a name in the *New document* dialog box.
2. Click *Create document*.

Result

The record object is created in the selected file. The placeholders in the template are filled with information from the file.

The new Word document opens automatically.

Outlook

If the information from the file changes, the record object can be updated using the Update Word document function.

The *Update Word document* function has no effect on subsequent changes to the record object. It only updates the information automatically transferred from the form.

Update Word document

Information

This function applies to record objects you have generated using the Create Word document function. You can update the selected record object. As a result, you do not have to create a new record object or make manual changes to an existing one.

The *Update Word document* function has no effect on subsequent changes to the record object. It only updates the information automatically transferred from the form.

Method

1. Select the record object you want to update.
2. On the *Public Sector* tab, click *Update Word document*.

Result

Old information and blank spaces in the document are replaced with new information from the file.

Create cover sheet

Information

You can create a cover sheet for the selected file.

Method

1. Select the file you want to create a cover sheet for.
2. On the *Public Sector* tab, click *Document > Create cover sheet*.

Result

The cover sheet is saved to the file.

Outlook

The cover sheet contains information on the file as well as a QR code. If you print the cover sheet and file it to a physical file, mobile end devices will take you straight to the digital file by scanning the QR code.

Create label

Information

You can create a label for the selected file.

Method

1. Select the file you want to create a label for.
2. On the *Public Sector* tab, click *Document > Create label*.

Result

The label is stored in the file.

Outlook

The label contains information on the file as well as a QR code. If you print the label using a label printer and file it to a physical file, mobile end devices will take you straight to the digital file by scanning the QR code.

If you want to use the *Print document* function in the ELO Java Client, you will have to set the label printer as the default printer in Windows.

You can also select the label printer as the default printer for faxes in the ELO Java Client configuration and print using the *Fax document* function.

Routines

Once you have created cases or circulation folders, you can start routines on them. You can either use a preconfigured routine or define a custom one.

It is also possible to start multiple routines for one case or circulation folder.

This chapter addresses:

- Start routine
- Create multiple routines
- Edit routine

Start routine

Information

You can start a routine either by using the routine configured when creating the case or circulation folder or by defining your own routine.

Method

1. Select the case or circulation folder you want to start a routine for.

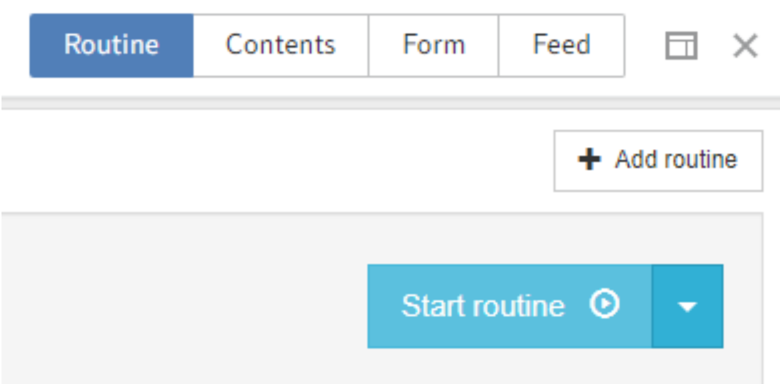


Fig.: 'Routine' tab

1. Click the *Routine* tab.

How you proceed depends on whether you have already configured a routine.

1) A routine was configured on creation: On the *Routine* tab, you will see the individual steps of the configured routine.

Click *Start routine* to start the routine without any additional changes.

You can also tailor the routine to your needs:

- Delete step: Move the cursor over the step you want to delete. Click the *X* that appears.
-

Move step: Move the cursor over the step you want to move. Click the step and drag it to the position where you need it holding down the mouse button.

- Edit step: Move the cursor over the step you want to edit. Click the *Edit* button that appears. You can edit all elements of the step. You will find a description of the elements under *No routine figured on creation*.
- Add step: To add a step to the routine, click *+ Step*. You will find a more exact description under *No routine figured on creation*.

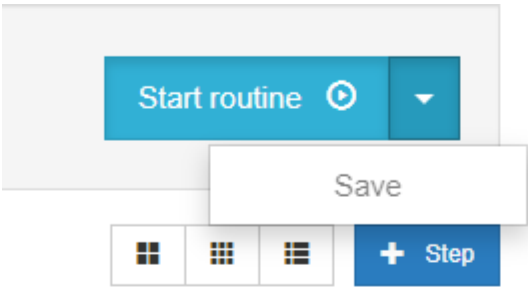


Fig.: 'Save' button

If you want to save your changes without starting the routine, click the down arrow. Click *Save*.

Otherwise, click *Start routine*.

2) No routine configured on creation: To create steps for the routine, click *+ Step* and define the step:

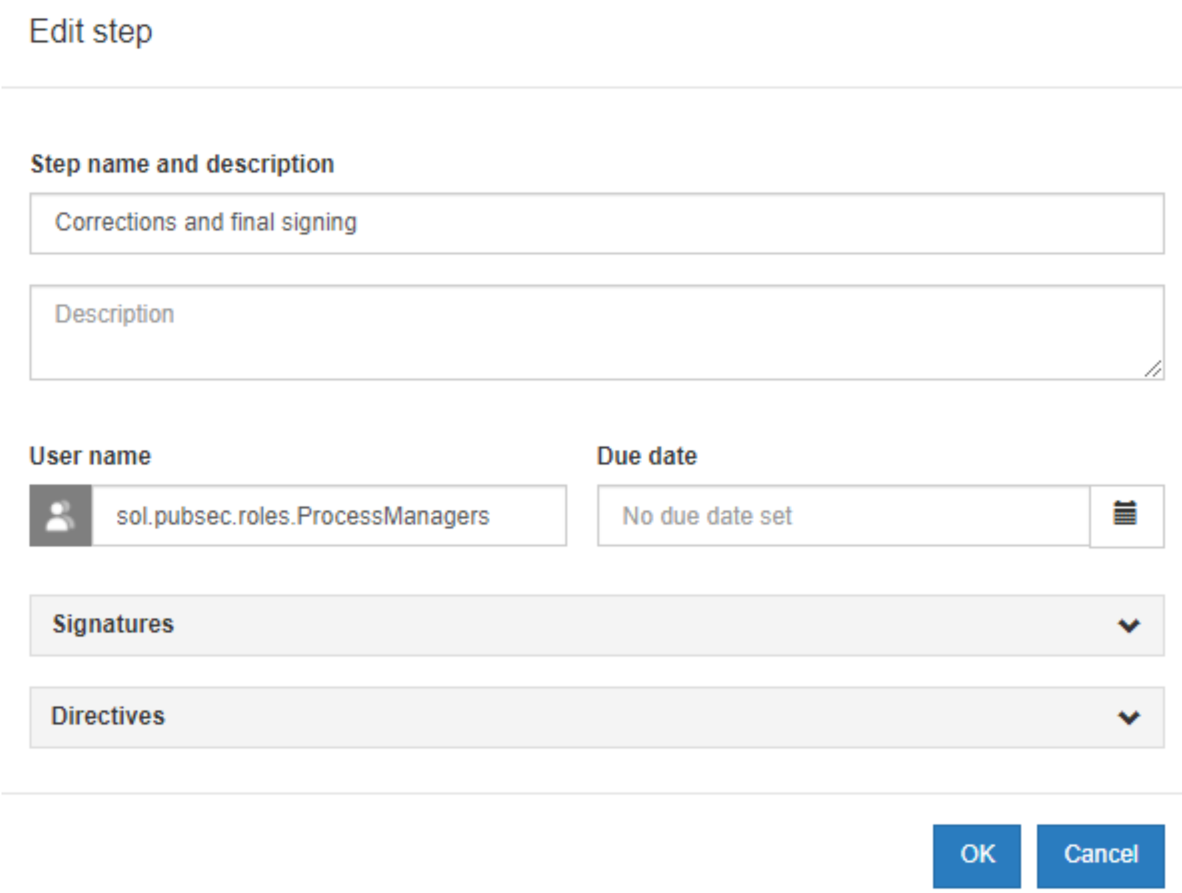


Fig.: 'Edit step' dialog box

Field	Meaning
Step name and description	In the *Step* text field, enter a descriptive name. The name is shown on the tile created for the step. In the *Description* text field, you can enter additional instructions or explanations. The recipient of the step sees the description.
User name	You can select a user or a group as the recipient. Suggestions will appear as you begin to type.
Due date	You can select a due date by clicking the calendar icon. Alternatively, you can type a date.
Signatures	Clicking the field opens the input options. To prevent the step from being completed before all signatures have been completed, check the *Block routine* box. You can create multiple signatures by clicking *+ New signature*. In the field with the *Co-signature* placeholder, enter the type of signature required. If only this signature should be mandatory, click *Optional*. The button changes to *Mandatory*.
Directives	Clicking the field opens the input options. You can create multiple directives by clicking *+ New directive*. In the field with the *Directive* placeholder, enter the type of directive required. If only this directive should be mandatory, click *Optional*. The button changes to *Mandatory*.

Repeat this process for all the necessary steps.

Save: You can save your entries without starting the routine. To do so, click the button with the down arrow. Click *Save*.

Start routine: Otherwise, click *Start routine*.

Result

The routine is started.

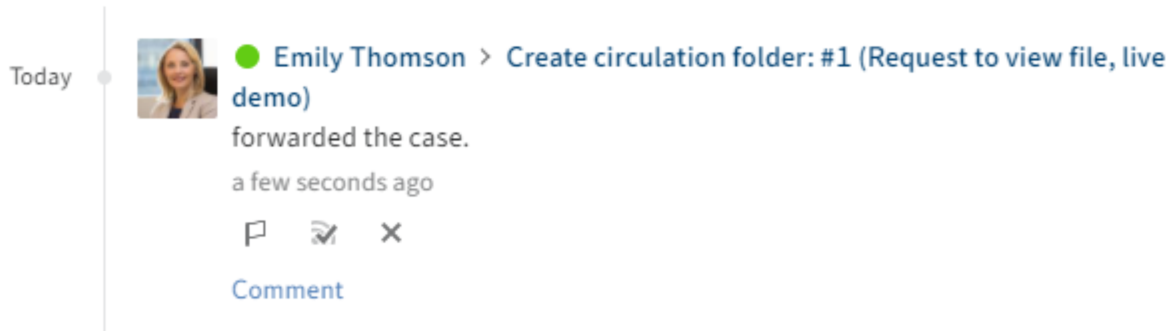


Fig.: Feed post

You will see the actions of the individual editors in your feed.

Outlook

Once your routine has gone through all the processing steps or was canceled, you will finally find it in your *Tasks* work area.

To complete the routine, click *Pass workflow forward*.

Create multiple routines

Information

You can start multiple routines for a case or circulation folder.

Method

1. Select the case or circulation folder you want to start a routine for.
2. Click the *Routine* tab.

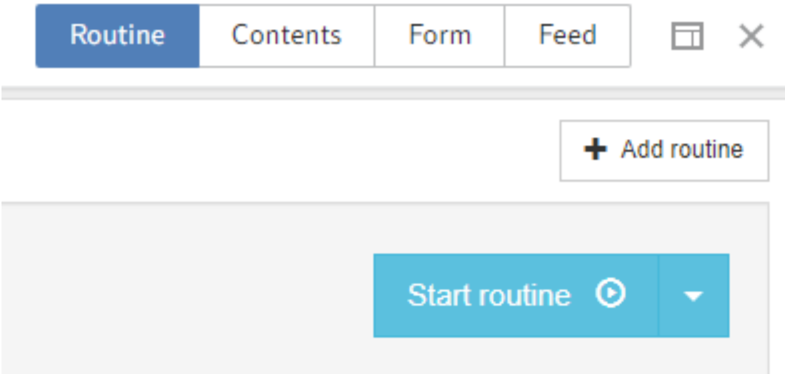


Fig.: '+ Add routine' button

1. Click *+ Add routine*.

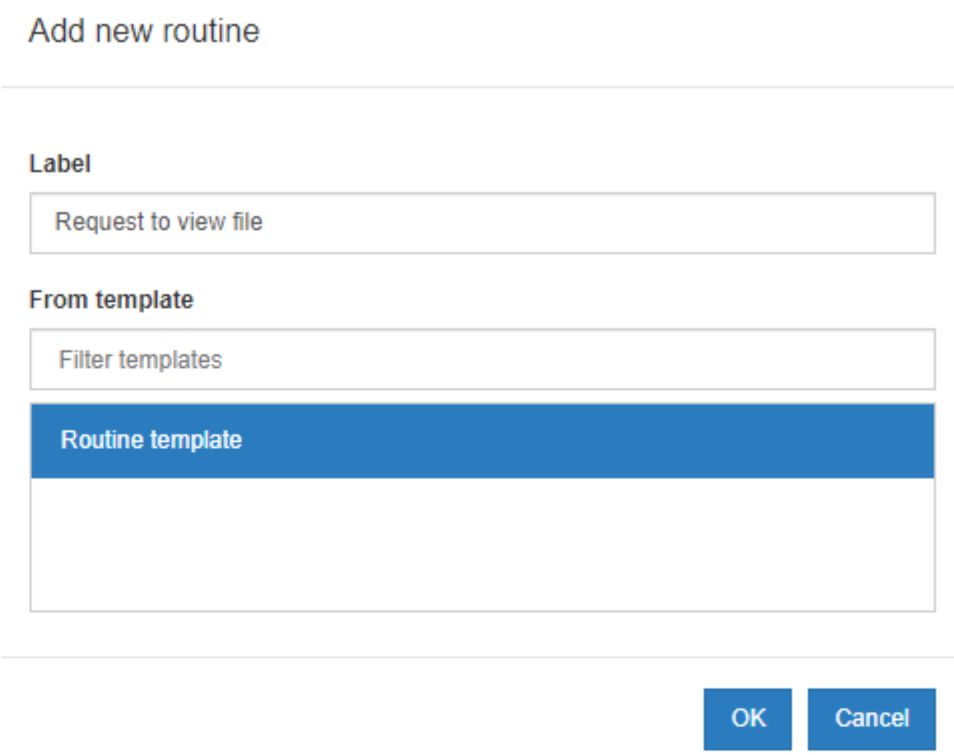


Fig.: 'Add new routine' dialog box

1. In the *Add new routine* dialog box, you give the routine a name and, if necessary, select a template for the routine by marking the template in the overview.

Proceed as described in the chapter Start routine.

Result

You have now created two or more routines you can switch between.

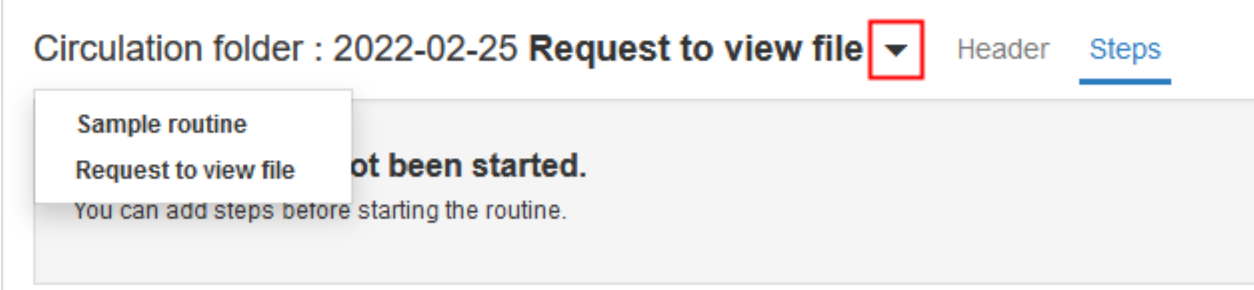


Fig.: Changing the routine

To change the routine, click the arrow next to the name of the case or circulation folder. All created routines appear in a drop-down menu for selection.

Edit routine

Information

If you are set as the editor of a step in a routine, you will receive it in your *Tasks* work area.

Method

1. Select the task you want to process.

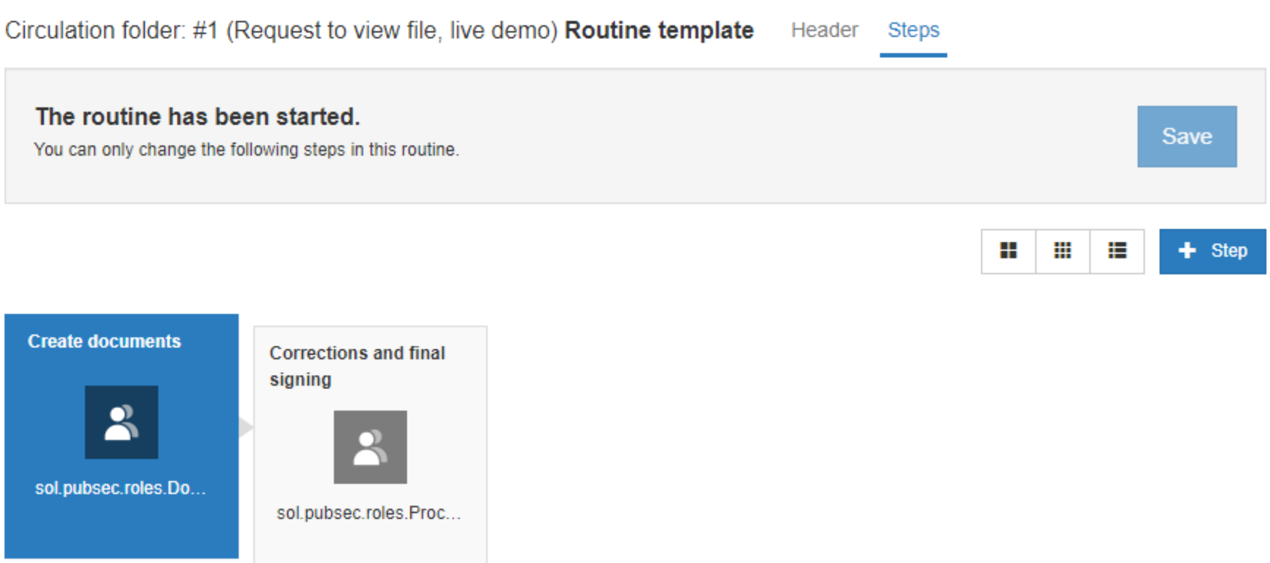


Fig.: 'Steps' tab

On the *Steps* tab, you will see the completed, current, and future steps of the routine.

Optional: Click *Accept workflow* if you received the workflow as a member of a group.

Information

You can edit the future steps of the routine or add more steps before forwarding the routine. The chapter Start routine explains how to proceed.

1. On the *Task* tab, click *Forward workflow*.

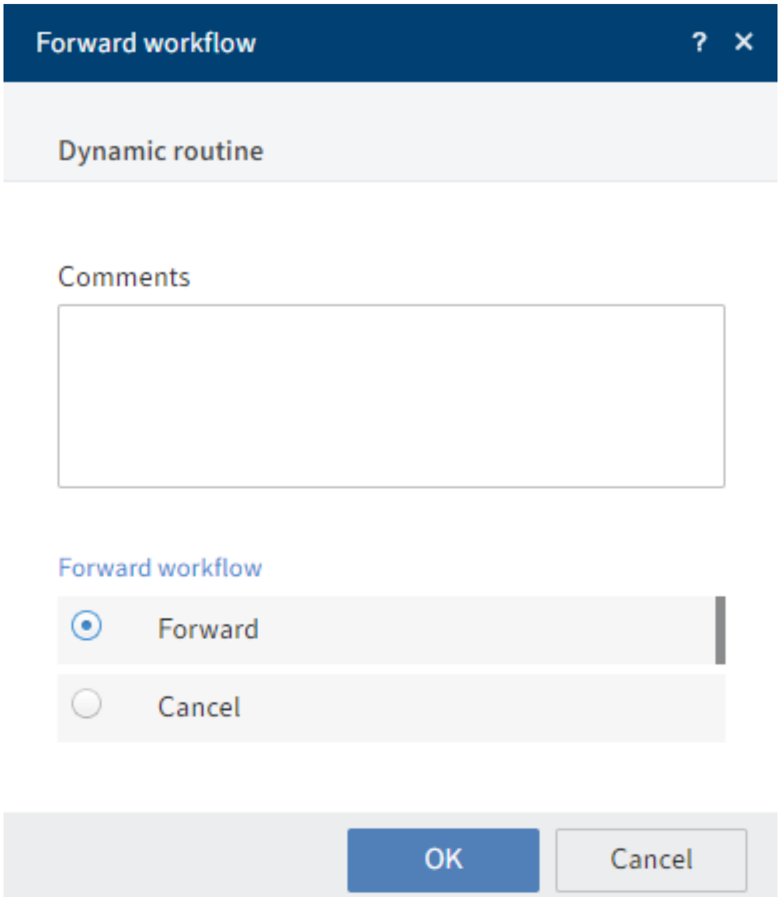


Fig.: 'Forward workflow' dialog box

1. In the *Forward workflow* dialog box, select whether you want to forward the routine or cancel.

2. Click *OK*.

Result

The workflow disappears from your tasks area and goes to the next step.