



ELO Desktop Client

Personalization



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Create tile

Create new view

With the *New view* function, you can create a new folder view. The folder view is created as a new tile in the tile navigation.

A view provides you with quick access to a specific area of the repository. When you create a view, it is displayed as a tile in the tile navigation.

Related functions

- Task view: A task view shows you tasks with criteria you selected.
- Most recently used: The *Most recently used* tab in the *My ELO* work area provides fast access to your folders. You can pin folders here.
- Configuration - Views: In the *Views* category of the configuration, you can also create new views.

Method

1. In the *Repository* work area, select the project folder you want to create a view for.
2. On the toolbar, select *View > New view*.

Create view



Invoices

Name
Invoices

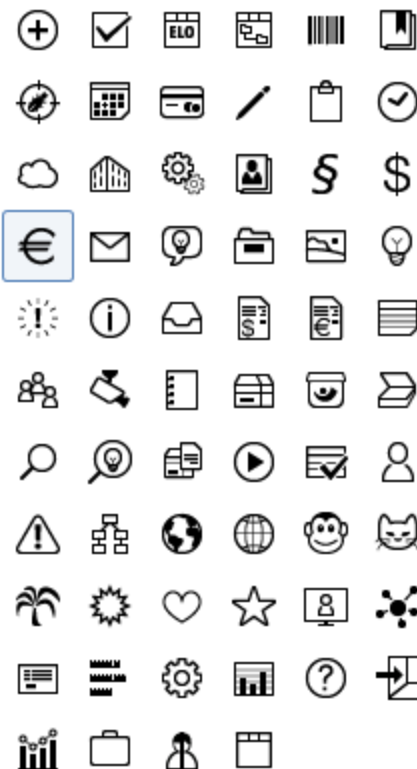


☐ Small
☒ Large

Color



Symbol



Folder



Most recently used



Repository

Views



Repository

- > Documentation
- > Executive management
- > Finance
- > Invoices

The *Create view* dialog box appears.

3. Configure the tile by selecting a size, color, and icon.

The *Name* field automatically contains the name of the folder you selected. You can change the name.

Optional: In the bottom area of the dialog box, you can change the selected folder.

4. Select *OK* to close the dialog box.

Result

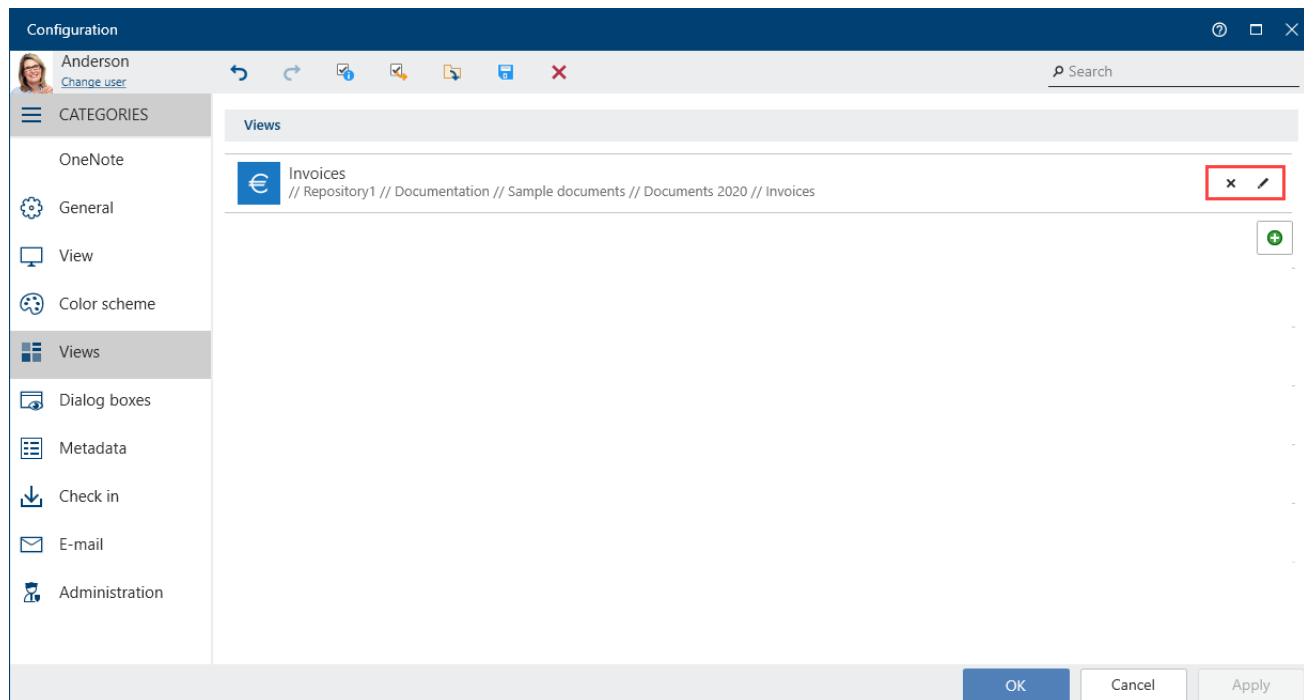
A tile is created for the new view under the *Repository* group in the tile navigation.

Outlook

You can drag and drop a tile to another position.

If you have created multiple views, you have the option to group them. To learn how to create a group in the tile navigation, refer to the section *Groups*.

You can edit or delete the view later on. To do so, open the configuration by selecting *User menu [your name]*. There, navigate to the *Views* category. You can delete the view by selecting the X icon or edit it by selecting the pencil icon.



Task view (ELO Desktop Client Plus only)

Available in: *Tasks* work area

Use the *New view* function to create a new task view.

A view provides you with quick access to a specific area of the repository. When you create a view, it is displayed as a tile in the tile navigation.

Method

1. Navigate to the *Tasks* work area.
2. On the toolbar, select *View > Create view*.

The 'New view' dialog box is shown with the following details:

- Title bar:** New view
- Subtitle:** Task view
- Name:** Task view
- Type:** Tasks
- Size:** Large (selected)
- Color:** A grid of color swatches with the teal color selected.
- Symbol:** A grid of various icons with a checkmark icon selected.
- Task filter:**
 - Task type: All task types
 - Priority: All priorities
 - Status: [Dropdown menu]
 - Name: [Dropdown menu]
 - Workflow step: [Dropdown menu]
- Buttons:** OK, Cancel

3. In the *New view* dialog box, define the criteria for showing tasks in the task view.

Metadata form: Use the *Metadata form* drop-down menu to select a metadata form if you only want tasks with the corresponding metadata form to be displayed in the task view.

Fields: If you have selected a metadata form in the *Form* field, you can select a field from the metadata form from the *Field* drop-down menu to filter by its contents.

4. Select *OK*.

Result

A tile is created for the new view under the *Tasks* group in the tile navigation.

Outlook

- You can drag and drop a tile to another position.
- If you have created multiple views, you have the option to group them. To learn how to create a group in the tile navigation, refer to the chapter Groups.
-

You can delete a task view. Navigate to the task view and on the ribbon select *View > Delete view*.

Customize toolbar



The favorites bar is on the left edge of ELO. This bar is only available in the *Repository*, *Search*, and *In use* work areas as well as the *Tasks* work area (only ELO Desktop Client Plus).

This bar contains all functions you have favorited. To perform a function, select the button in the favorites bar. Functions may be grayed out in the bar depending on your selection.

You can customize the favorites bar for the different work areas.

Manage favorites

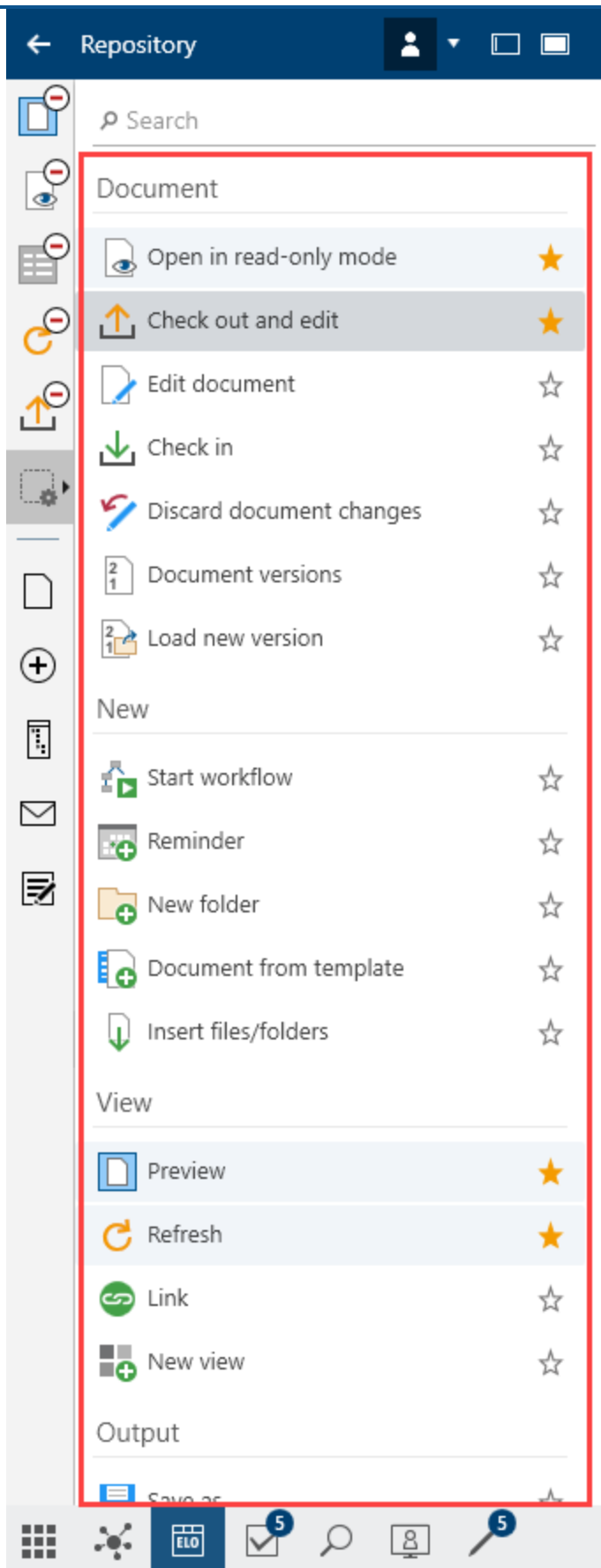
With *Manage favorites*, you can tailor your favorites list to your needs. All functions of the area are listed here, sorted by function groups.



Add functions

Method

1. Select *Manage favorites*.



A list of all functions opens, divided into the groups *Document*, *New*, *View*, *Output*, and *Organize*.

In the *Search* and *Tasks* work areas, the contextual group *Search* or *Tasks* is also available.

2. Select a function from the list that you want to place on the favorites bar.

Result

The star is filled in and the function is added to the favorites bar with a matching icon.

Remove functions

To remove functions from the favorites list, follow these steps:

Method

1. Select *Manage favorites*.

A list of all functions opens, divided into the groups *Document*, *New*, *View*, *Output*, and *Organize*.

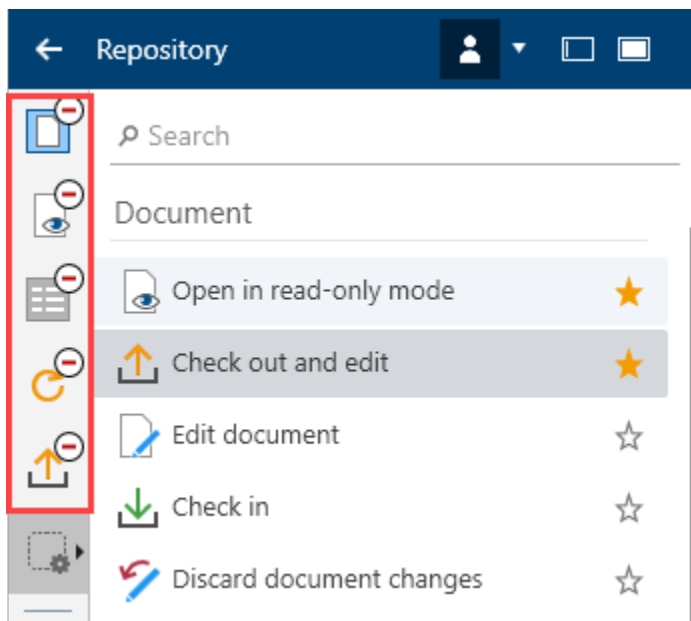
In the *Search* and *Tasks* work areas, the contextual group *Search* or *Tasks* is also available.

2. Select the function from the list that you want to remove from the favorites bar.

Result

The yellow star is removed and the icon for the function disappears from your favorites list.

Optional: If you open the list of functions using *Manage favorites*, the icons for the functions have a minus symbol. If you click the minus symbol, the function disappears from the functions bar.



Clicking *Manage favorites* saves the changes.

Adjust settings

Configuration

Available in: *User menu [your name] > Configuration*

Use the *Configuration* dialog box to change the local settings. You can define many personal settings yourself; your system administrator will perform all other settings. If necessary, contact your system administrator if you want to change certain settings and you are unable to do so via the *Configuration* dialog box.

The *Configuration* dialog box consists of multiple categories:

- General
- Display
- Color scheme
- Views
- Dialog boxes
- Metadata
- Check in
- E-mail
- Microsoft OneNote
- Administration

You can minimize the names of the categories by clicking *Categories*.

The following describes only the parts of the configuration categories requiring an explanation.

Configuration - top area



The following functions are available in the upper area of the configuration:



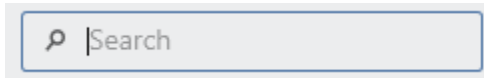
Select the left arrow (keyboard shortcut: CTRL + Z) to undo your last change. Select the right arrow (keyboard shortcut: CTRL + Y) to redo the change.



You can use this button to show or hide the "Set by" column. This shows at what level changes have been made to the settings.

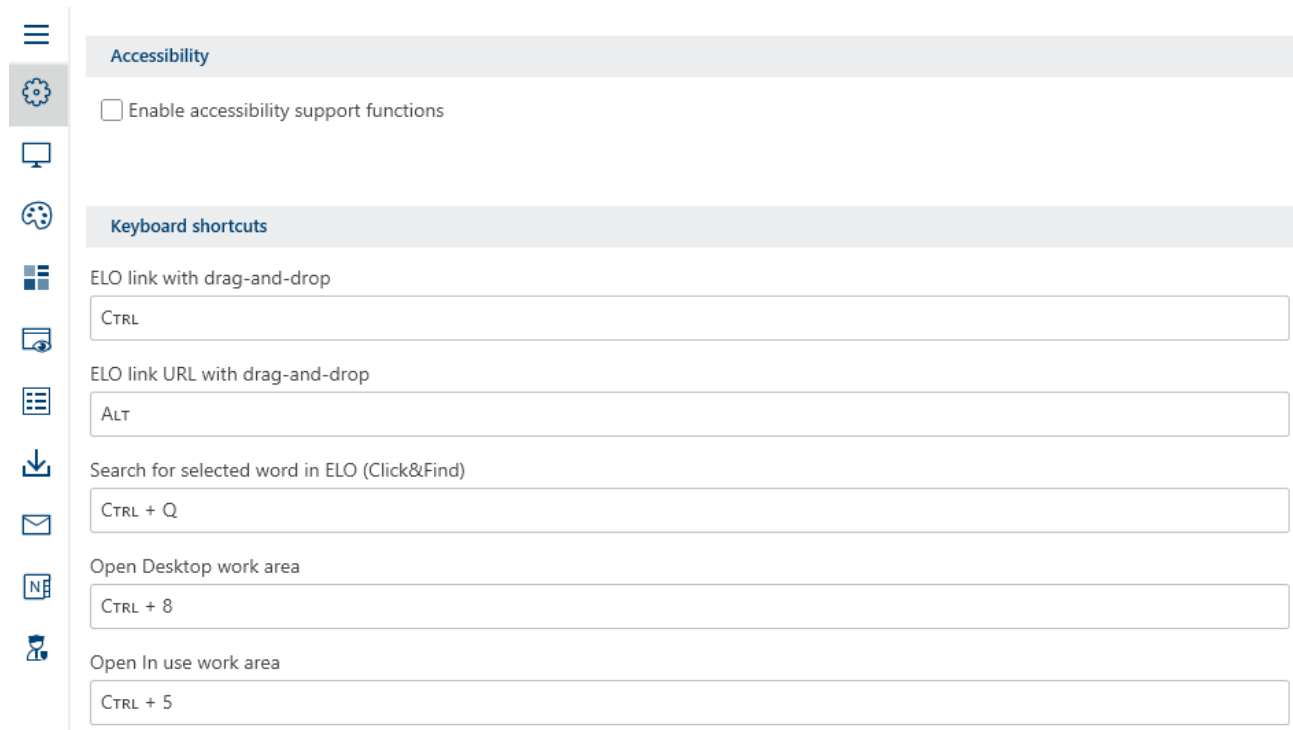


Select the X icon to delete all your custom settings. The settings for the next level, such as those for the option group, apply automatically. For more information about the level concept in the configuration, refer to the [ELO Desktop Client administration](#) documentation.



You can browse the entire configuration settings. While entering a search term, search results are filtered and highlighted right away thanks to the *search-as-you-type* function. The first area matching the search input appears. Navigate using the area overview on the left side if the results are spread across multiple areas. You can make the desired settings right in the search results.

Configuration - General



Accessibility

☐ Enable accessibility support functions

Keyboard shortcuts

ELO link with drag-and-drop
CTRL

ELO link URL with drag-and-drop
ALT

Search for selected word in ELO (Click&Find)
CTRL + Q

Open Desktop work area
CTRL + 8

Open In use work area
CTRL + 5

Accessibility

In the *Accessibility* section, you can enable accessibility support features for your ELO.

Enable accessibility support functions: If you enable this function, the following changes will be applied in your ELO.

- Dialog boxes open in a separate window
- Disabled text boxes can be focused with a tab

This setting applies to all users logging on to this computer and is not transferred to other users.

Configuration - Display (1)



Copy

Behavior when copying an entry in a folder with differing permissions

☐ Keep previous permissions unchanged

☒ Replace with rights of the target folder

Tree view

☐ Show deleted entries until next logoff

List of most recently used entries

Maximum number of entries in the "Recently used" list

Search

Number of search results to preload

Number of index columns for the metadata in the search results tables

☐ Open the search options automatically for new searches

Document size

Maximum document size for the viewer pane in MB

Search

Number of search results to preload: A lower value improves search times.

Preview configuration for different file types

File extension	Preview	Confirm	
avi	Multimedia preview ▼	☐ Confirm	x
bmp	Image preview ▼	☐ Confirm	x
csv	Windows Explorer preview ▼	☐ Confirm	x
doc	Windows Explorer preview ▼	☐ Confirm	x

Task list display options

Maximum number of tasks in the list:

Maximum number of days in the future:

Refresh interval in minutes:

☐ Function and show "Forward workflow" dialog box

Information: Set whether workflows without a configured form can be processed via the previous "Forward workflow" function with a dialog box instead of with the default form. Processing via the dialog box is required to use index fields. To benefit from new developments, we recommend switching the desired functions to forms.

Preview configuration for different file types

In this area, you define which type of preview is used for which file extension. If no preview method is defined for a file extension, the *browser preview* is used.

You can filter the preview configuration (filter icon), search it (magnifying glass icon), and add new file types with a preview method (green plus icon).

This list shows the existing file extension and preview method assignments.

The following preview methods are available from the drop-down menu.

- **E-mail preview:** Viewer for e-mail files. The available buttons allow you to reply to or forward the e-mail. Your standard e-mail program opens. Metainformation such as the date, subject, and attachments are shown under the buttons. If the e-mail is in HTML format, a browser is displayed. If the e-mail is in rich text format (RTF), a text preview is used.
- **Multimedia preview:** Uses Windows Media Player for preview purposes. The following file types can be played: MP3, MP4, WMV, WMA, WAV, AVI, MPG, MPEG, MP2, MPA.
- **Image preview:** Viewer for image files. You can adjust the viewer using the viewer bar. If the document contains annotations, they are shown on an additional tab.
- **PDF preview:** Viewer for PDF files. The available buttons allow you to zoom in, zoom out, and fit the page. The viewer bar allows you to adjust the zoom level and the page number.

Windows Explorer preview: Viewer that Windows Explorer also uses. In addition to the existing assignments, all file types can be linked with this preview method. This may require a separate program that provides the preview functionality.

- Text preview: A simple text preview is used as the method.
- Browser preview: The preview is shown in a web browser (Chromium). In addition to the existing assignments, the file types PDF, MP3, MP4, MPEG, PNG, JPEG, BMP, and GIF can also be linked with this preview method.
- Office Online preview: Web preview for Microsoft Office documents. This requires access to a Microsoft Office Online server.

Task list display options (only ELO Desktop Client Plus)

You can configure the settings for the *Tasks* work area here.

Information

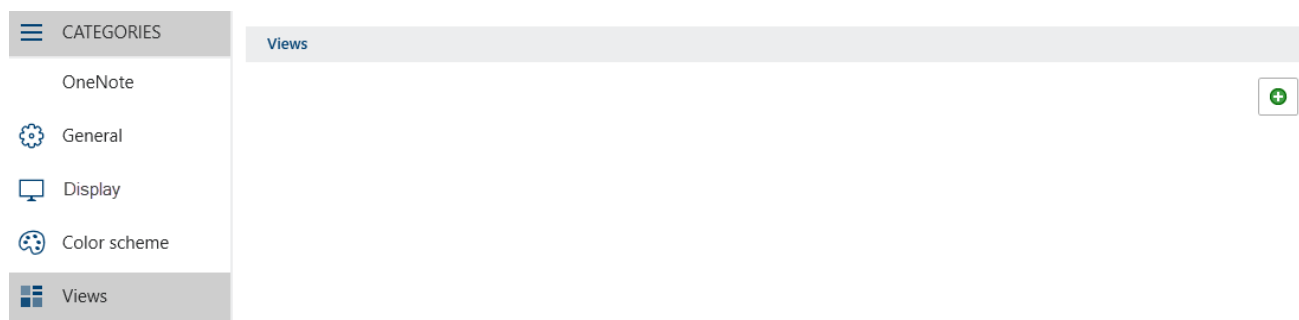
This configuration option is only available in ELO Desktop Client Plus.

Maximum number of days in the future: The task list in the *Tasks* area contains an overview of all tasks that are due. Use this option to specify in how many days a task must be due for it to be displayed in the task list. For example, if you enter the value 10, all tasks that are due in the next ten days will be displayed. Tasks that are only due in 20 days are not displayed.

Refresh interval in minutes: Specify how often you want the task list to be refreshed here. If you do not want the task list to be refreshed automatically, enter 0.

Process tasks with "Forward workflow" dialog box: If this option is enabled, you have to use the *Forward workflow* function to process and forward the workflow in a new dialog box. If the option is disabled, workflows without a form template are shown in the *Tasks* work area in a standard form and can be processed there.

Configuration - Views



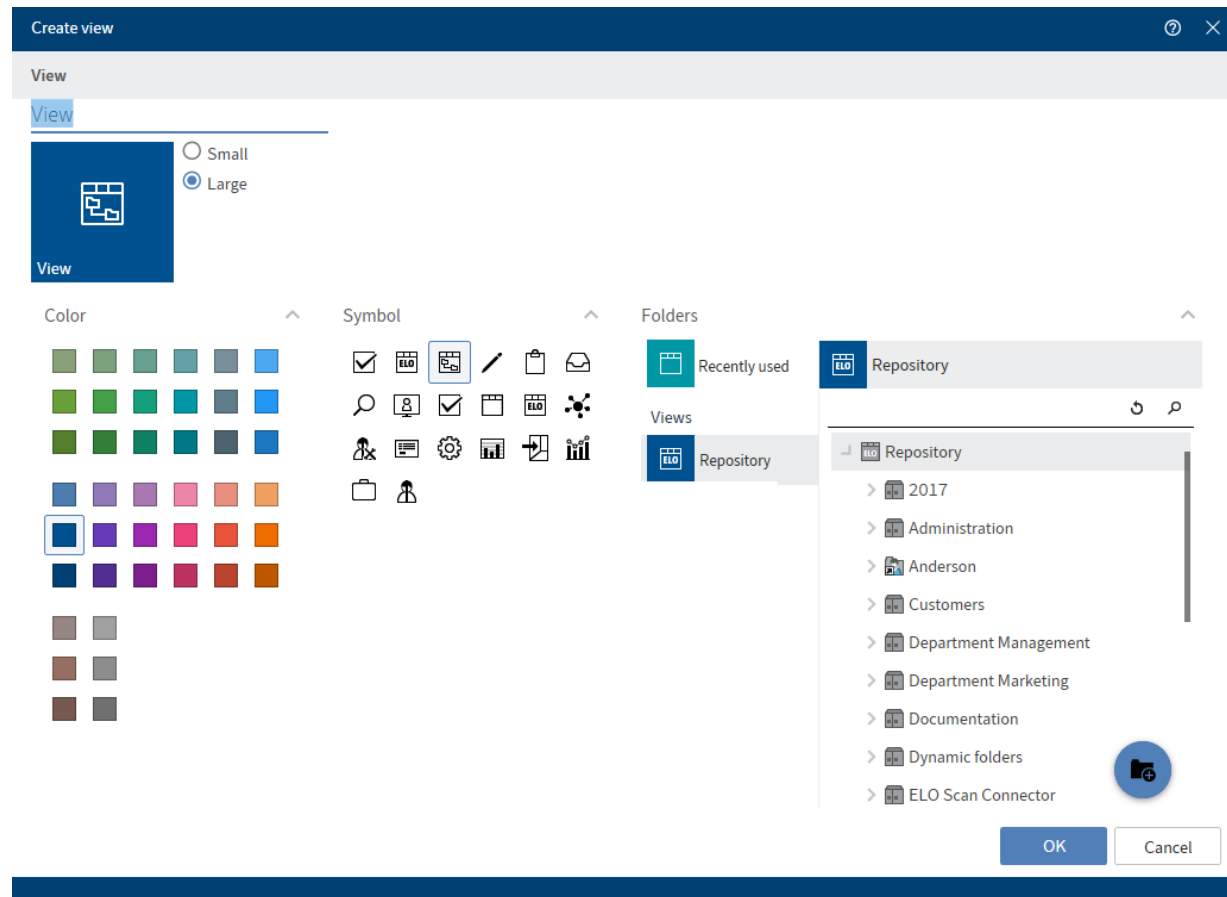
In the *Views* category, you can create views for folders in the *Repository* work area.

A folder view creates a tile that gives you direct access to the folder.

Method

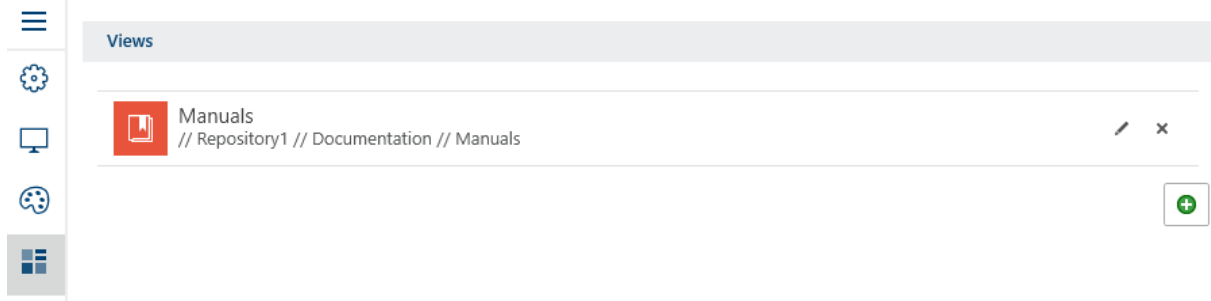
- 1.

Select the green plus icon to create a new view.



The *Create view* dialog box appears.

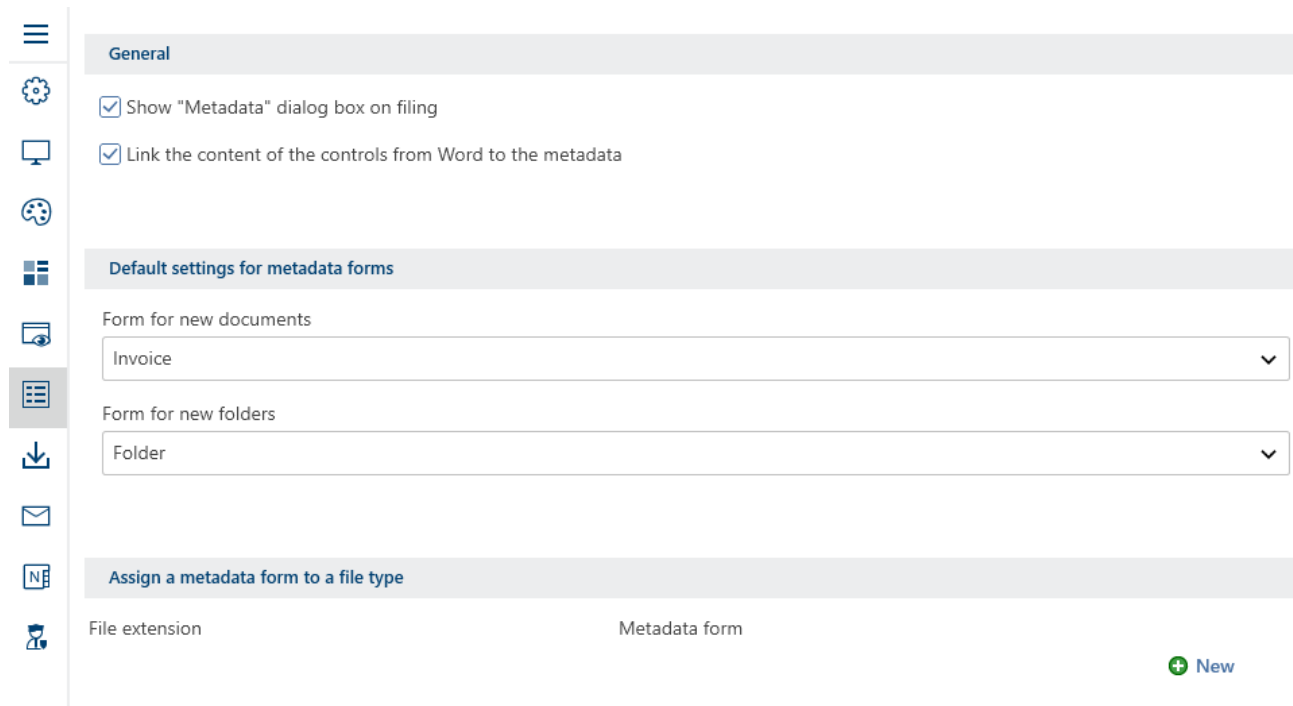
2. Enter a name for the view.
3. Select whether you want to display the view as a small or a large tile.
4. Choose a color for the view.
5. Select an icon.
6. In the *Folder* area, select the folder from the tree that you want to create a view for. With *Recently used*, you can narrow down the folders to your most recently used folders in ELO. Select the folder icon to create a new folder.
7. Select *OK*.



Result

The view you created appears in the *Views* category. You can delete the view by selecting the X icon. Edit it by selecting the pencil icon.

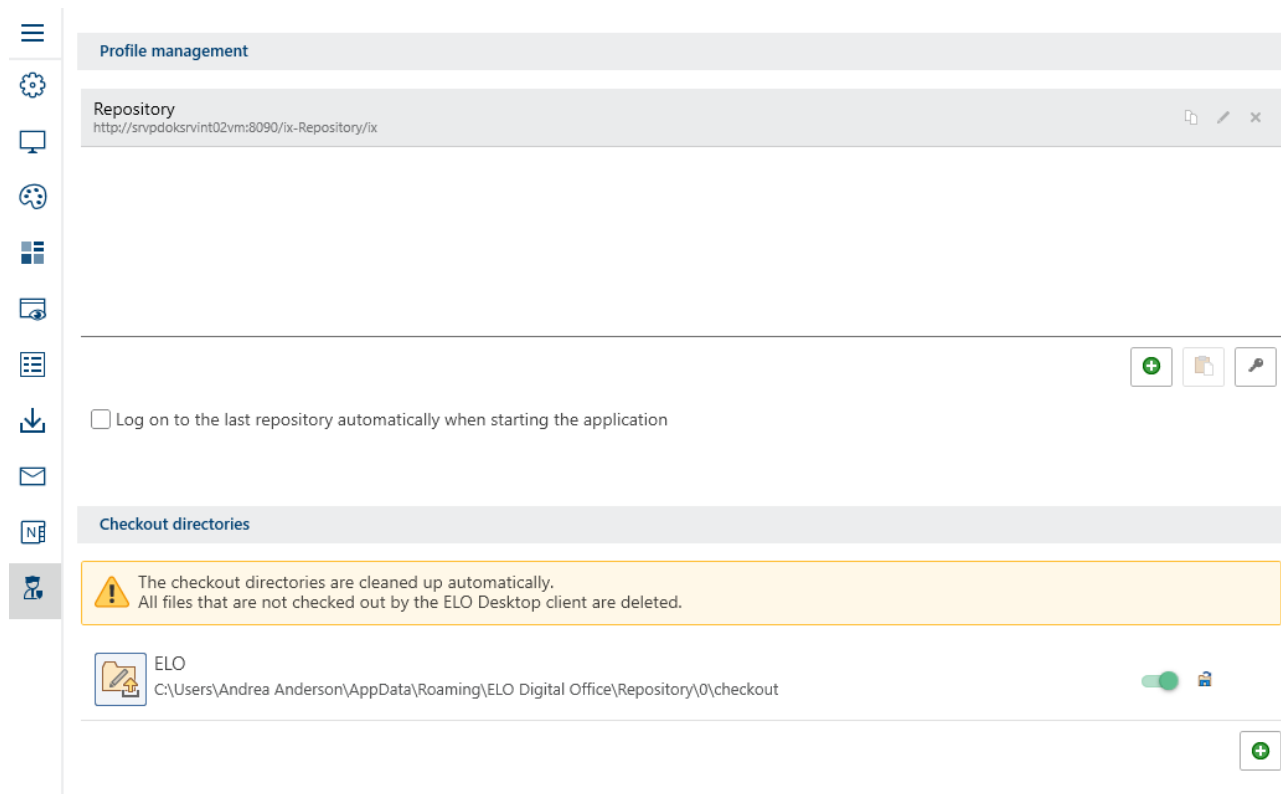
Configuration - Metadata



Assign a metadata form to a file type

Specify whether certain file types should only be used with specific metadata forms. This is useful for filing unusual file formats, but can also save time for frequently recurring filing.

Configuration - Administration



Profile management

The *Profile management* area lists all available profiles with the name and corresponding URL.

To copy, delete, or edit an existing profile, select the profile.

To create a new profile, select the green plus icon. The *Create new profile* dialog box opens. Enter the profile name and the corresponding ELO Indexserver URL. The system verifies whether the ELO Indexserver is available. If successful, *Server available* appears in green. Add the profile with *OK*.

To insert a copied profile from the clipboard, select the insert icon. The name of the profile and the URL were copied with the following syntax: < profile name>;< logon type>;< URL>. The syntax distinguishes between two logon types. The *U* stands for logon with an ELO account, while the *S* stands for SSO (Windows account). If you only have the ELO Indexserver URL on your clipboard, the profile name is generated based on the URL.

To see what passwords have been saved for which repositories and users, select the key icon.

Log on to the last repository automatically when starting the application: Enable this option to automatically log on to the most recent repository with the same user data when starting the application.

Checkout directories

Files have to be taken from the ELO repository to edit them. During editing, they are checked out and saved as temporary files to a folder in the file system. In the list, you see all available checkout directories. Use the control to enable or disable each individual checkout directory.

Selecting the folder icon allows you to view the content of the checkout directory on the file system.

Selecting the green plus icon creates a new checkout directory on the file system.

Please note

The checkout directories are cleaned up automatically. All files that are not checked out by ELO are deleted.

Enable roles

Available in: *User menu [your name] > Enable roles*

Roles are used to grant users additional rights in ELO. For example, a role can grant a user membership to the *Accounting* group. You do not need the additional group rights for your everyday work, so you can enable them as and when required. You need to enable the role to get the corresponding rights in the client.