



# **ELO Desktop Client**

Basics



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## Basics

### What is the ELO Desktop Client?

As a sidebar, the ELO Desktop Client is always docked to your desktop and monitors the active window. When it detects a supported application, ELO becomes active. Depending on the application, the ELO Desktop Client offers a wide range of ELO functions. It supports Microsoft Office applications, Windows Explorer, and the Windows Desktop. You can dock ELO on the left or right side of the desktop.

### Target audience

This documentation is aimed at users of the ELO Desktop Client. Administrators can use the [ELO Desktop Client administration](#) manual.

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

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

### Operating system

In this documentation, the functions and examples are shown based on a Microsoft Windows operating system.

The ELO Desktop Client is designed for use on a Microsoft Windows operating system.

### Getting started

If you have no previous experience with ELO, the following chapters are a good place to start:

- Program interface, Navigation and use, Important components: These chapters explain the interface and how to use ELO in general. They cover individual topics at a more advanced level.

### Structure of the documentation

The goal of this documentation is to explain the functions of ELO. It also presents ELO Desktop Client Plus and its functions.

#### Basics

The first chapter contains general information about using the documentation and an overview of the chapter contents.

#### Program interface

This chapter contains an introduction to the program interface and a description of all work areas.

## Navigation and use

This chapter provides information about the basics of using ELO.

## Accessibility

This chapter contains information about the accessibility features in ELO.

## Important components

This chapter contains a description of important components.

## Important actions in detail

This chapter provides descriptions of some important actions with instructions and explanations.

## Functions

The remaining chapters cover the functions that are not described in the *Important actions in detail* chapter.

## ELO Desktop Client Plus

This chapter explains the additional functions in ELO Desktop Client Plus. This requires an appropriate license.

## Which chapter(s) should I read if I...

### want to personalize ELO?

#### Tile navigation

- Tile navigation settings
- Group tiles
- Folder view

#### Toolbars

- Toolbar
- Manage favorites

#### General settings

- Configuration

#### Personal settings

- Edit profile

### want to create entries?

#### Folders

-

## Create new folder

### Documents

- File documents
- Drag-and-drop
- File documents with the 'Desktop' work area
- Document from template

### Metadata

- Metadata

### want to update entries?

#### Edit documents

- Check out and edit document
- Check out to OneDrive
- Check in document

#### Load new version

- Load new version
- Drag-and-drop

### want to create tasks?

#### Information

The functions for creating tasks are only available in ELO Desktop Client Plus.

#### Workflows

- Start workflow

#### Reminders

- Reminder

### want to edit tasks?

#### Information

The functions for processing tasks are only available in ELO Desktop Client Plus.

#### Workflows

- Edit workflow with a form
-

Forward workflow

- Accept workflow
- Return workflow
- Delegate workflow

Reminder

- Edit reminder

### **want to keep track of changes in ELO?**

My ELO

- 'My ELO' button
- News

Search

- Add search favorite

### **want to output information from ELO?**

Entries

- Send
- Send as ELO link
- Save as
- Print

### **want to search for entries?**

- 'Search' work area
- Narrow down a search request
- Combined search in ELO and Microsoft Outlook

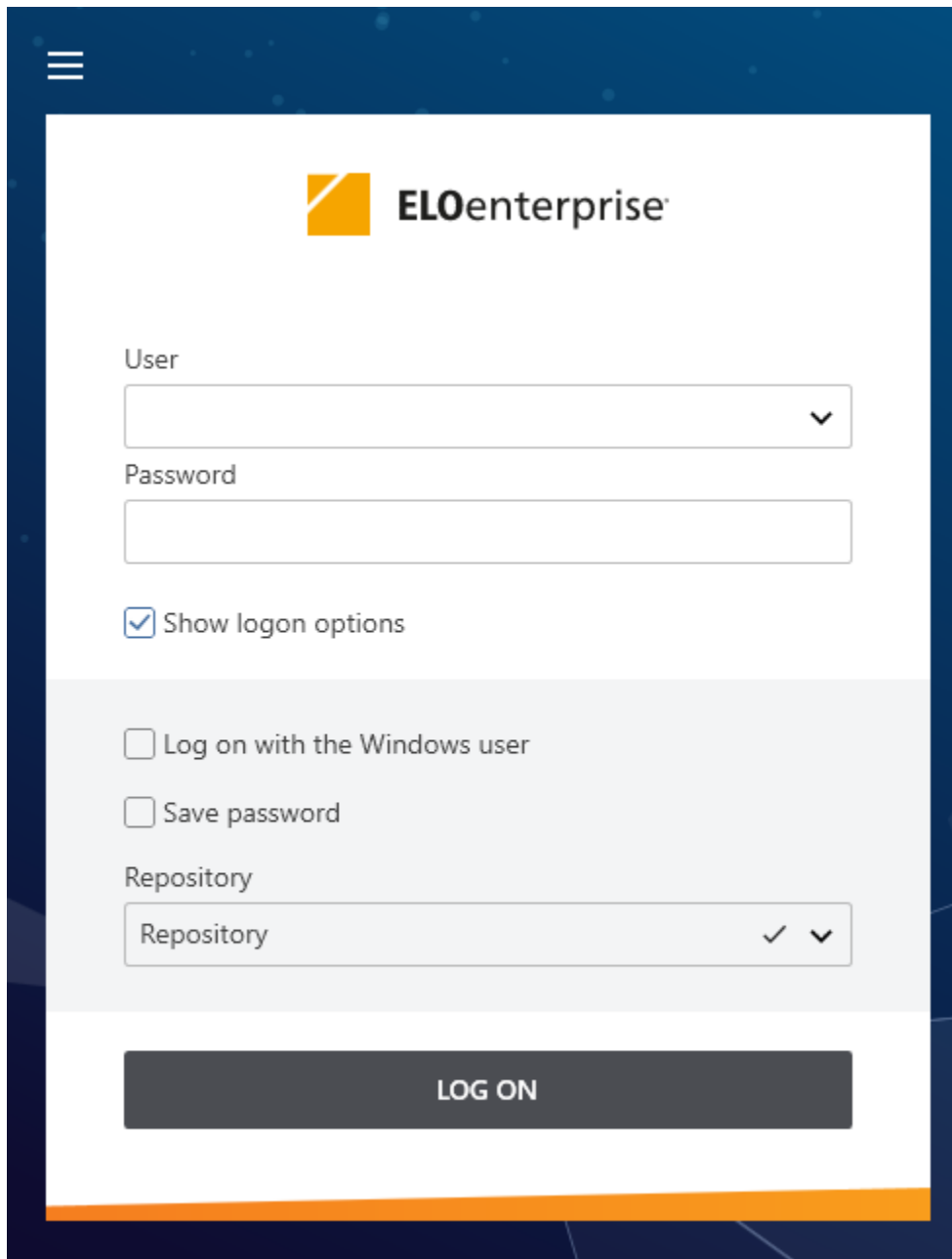
### **want to structure the repository area?**

- Move
- Reference
- Drag-and-drop
- Copy
- Link
- Paste

### **want to file e-mails?**

- Manual filing
- Link folder
- Dynamic extension

## Start ELO



Menu icon

**ELOenterprise**

User

▼

Password

☒ Show logon options

☐ Log on with the Windows user

☐ Save password

Repository

Repository ✓ ▼

**LOG ON**

Connect to ELO via the *Login* dialog box.

### Method

1. Enter your ELO logon information.

#### Information

If you have forgotten your password, contact your system administrator.

The following options are available:

-

### Show logon options

- Log on with the Windows user: The Windows account and Windows password are entered automatically. SSO (single sign-on) has to be set up in Windows first.
- Save password: You are logged in automatically the next time you start ELO. You can save the password for each profile. To see what passwords have been saved, go to the *Administration > Profile management* in the configuration and select the key icon. You can also remove passwords here.

In the *Repository* area, you will see the name of the connected ELO repository. A checkmark next to the profile name indicates that the repository is available.

### 2. Select *Log on*.

### Result

A connection has been established with the ELO repository. The tile navigation opens.



## New features

### Version 23.6

- Accessibility: JAWS screen reader is supported.
- Forward workflows with a default form: The *Forward workflow* function has been simplified. When possible, a default form is now used instead of the dialog box to forward workflows.

### Version 23.5

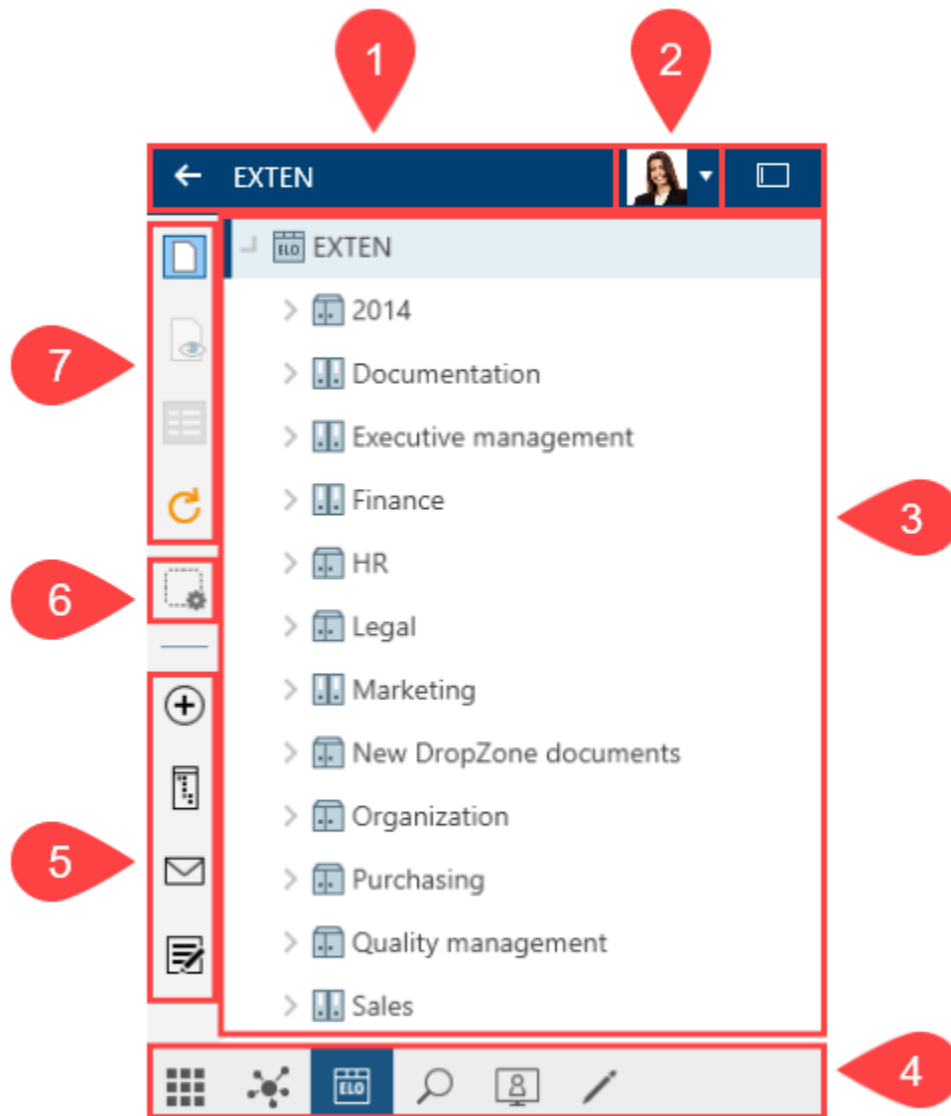
- Apply tile view: The administrator can transfer the tile view to another user or option groups via the configuration, so that all users or certain departments have the same tile arrangement. Only settings such as the color and the icon are taken on here. No tiles are deleted or created.
- New logon dialog box with ELO Modern Authentication: Logon is also possible using a Microsoft account, provided the administrator has set up this option.
- Functional roles these are no longer requested by default during logon. However, they can still be enabled in the user menu via the Enable roles function.

### Version 23.2

- Task views are available.

## Program interface

This chapter contains information on the ELO interface. It will help you orient yourself in your client.



The program interface is divided into the following areas:

- 1 Header: The header indicates which work area you are currently in.
- 2 User menu [your name]: Here, you will find various functions mainly for your personal settings.
- 3 Viewer pane: You see news, search results, the tree view, or the tile navigation, depending on which work area you are in.

4 Navigation bar: This toolbar provides access to the tile navigation, as well as to the *My ELO*, *Repository*, *Search*, *Desktop*, and *In use*, work areas and the *Tasks* work area (only ELO Desktop Client Plus).

5 Toolbar: The toolbar contains all functions you can use in the respective work area. These vary depending on the work area.

6 Manage favorites

7 Favorites bar

## What is a work area?

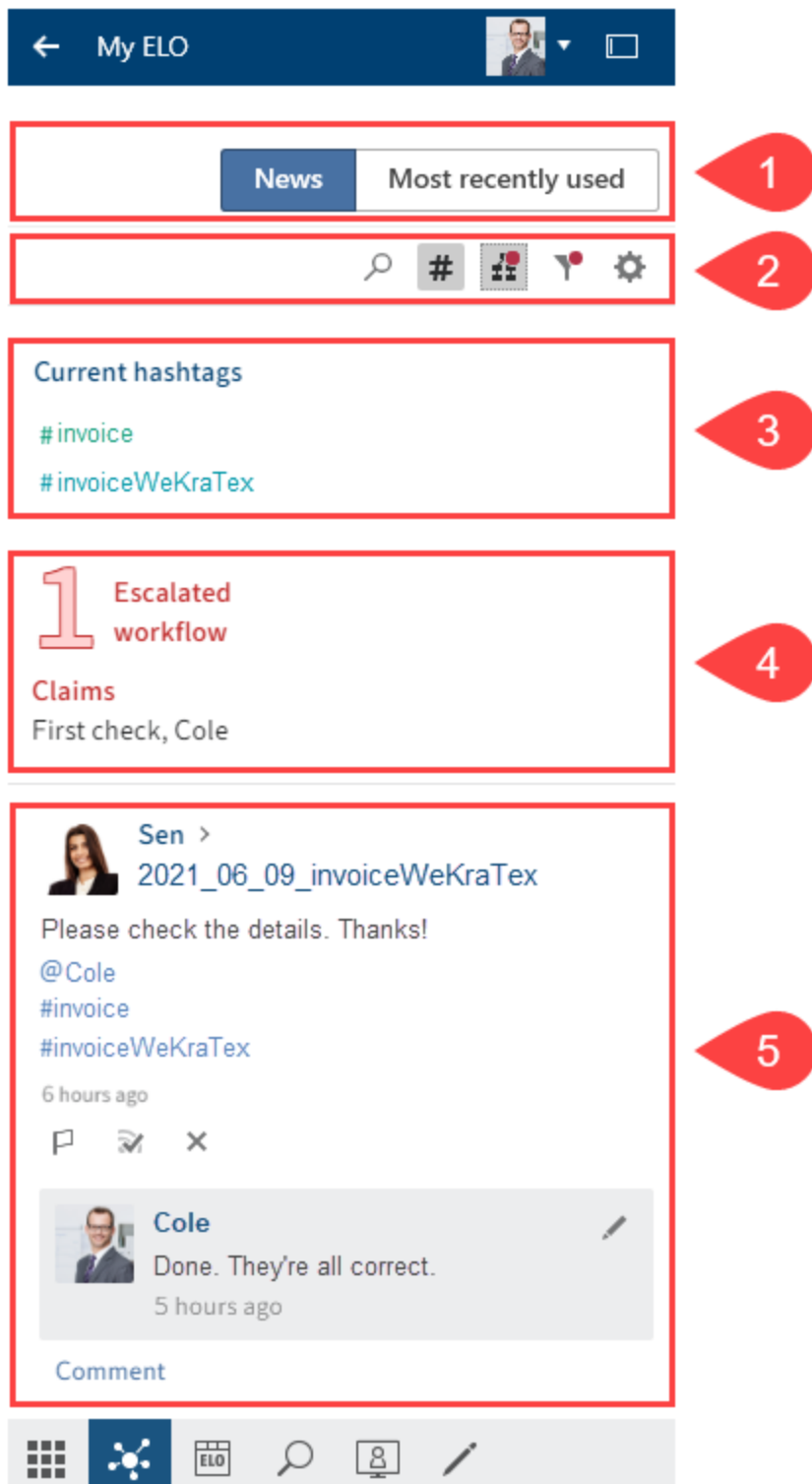
ELO contains different work areas. Each work area is used to complete specific tasks. Accordingly, not all functions are available in every work area.

ELO contains the following work areas:

- **My ELO:** In this work area, you will find your news and most recently used entries.
- **Repository:** This area contains all folders and documents that you are authorized to access. This is also where you create additional folders and documents.
- **Search:** This area is where you search for folders and documents that are stored in the *Repository* work area.
- **Tasks:** If you are assigned tasks, you will find them here. Tasks are always related to entries (folders or documents) in the *Repository* work area. The *Tasks* work area is only available in ELO Desktop Client Plus.
- **Desktop:** This work area acts as an interface between ELO and Windows. In this area, you will see an overview of entries currently selected at the file system level.
- **In use:** When you edit a document, it automatically appears in the *In use* work area.

## My ELO

In the *My ELO* work area, you will find your news and most recently used entries.



1 News/Most recently used

2 Toolbar: The preview in *My ELO* is not large enough to show all areas. For this reason, buttons appear in the toolbar for the respective areas.

3 Hashtags: Trending hashtags in ELO are listed here. Clicking a hashtag opens the overview for the selected hashtag, where all posts marked with the hashtag are shown.

4 Workflows: You can see all the workflows you are involved in here. Workflows with passed deadlines are highlighted in red.

5 Feed

## News

The *News* area helps you keep track of changes in ELO.

You will see feed posts from different entries here. Some examples include feeds you have subscribed to or in which you have been mentioned by another user. In addition, a hashtag cloud, escalated workflows, and recently started workflows that are relevant for you are also shown in this work area.

### Information

Most functions in the My ELO work area are feed functions. For more information, refer to the Feed chapter.

The *News* tab contains the following areas and functions:

Settings (gearwheel icon): You can edit the following settings here:

- My ELO
- Subscribed hashtags
- Polls started
- Profile (person icon)

Current hashtags: Select a hashtag to show all posts marked with the hashtag.

Substitution: If you have any active substitutions, you can see who you are substituting for here and who is currently substituting for you.

Workflows: Under Workflows, you can see all workflows you are involved in. Workflows with passed deadlines are highlighted in red. Select a workflow name to go to the respective workflow in the Tasks work area.

### Information

If the preview in my ELO is not large enough to show all areas, buttons appear in the toolbar for the respective areas.

## Feed functions in My ELO



Byte > Invoice\_Contelo

Please review details!

@Anderson

#Invoice

#Invoice\_Contelo

19 minutes ago



Comment

Posts older than one month are removed from *My ELO*. The *Mark as important* button (flag icon) lets you pin a post to the *My ELO* work area or remove it again. The post remains in the *My ELO* area even if it is more than a month old.

### Hide post



Byte > Invoice\_Contelo

Please review details!

@Anderson

#Invoice

#Invoice\_Contelo

19 minutes ago



Comment

You can hide the post from *My ELO*. Select the X icon below the post.

### Information

The *Remove from My ELO function* only hides posts in your *My ELO* work area. The post is not deleted. It stays in the feed for the corresponding entry.

If you hide a post, the *Undo* function is displayed. Select this button to show the post again.

The *Undo* function is only displayed for 5 seconds by default. You can change the length of time it is displayed in *My ELO > Settings > My ELO settings*.

Alternative: To hide all posts in *My ELO*, use the *Remove all posts from My ELO* function. You will find this function in *My ELO > Settings > My ELO settings*.

**Information**

Posts marked as important are not removed.

**Filters**

You can search the feed in *My ELO* for specific terms (magnifying glass icon) and filter it by specific criteria. You can select the following filters:

- New since
- Space
- Metadata form
- Post author
- Post type: You can filter by two post types: Automatically created posts (e.g. document version created) and posts created by users (user posts).
- Hashtag
- Additional filters: Depending on the settings, additional filters are available, such as filtering by posts you are mentioned in.

**Information**

In the default settings, all filters are applied in *is* mode. You can also set the filters to *is not* mode. To change this mode, select *is/is not* next to the filter category.

Reset filters: To reset all filters, select the *Reset filters* button (arrow icon).

**Most recently used**

The *Most recently used* area contains a list of entries that you recently viewed or edited.

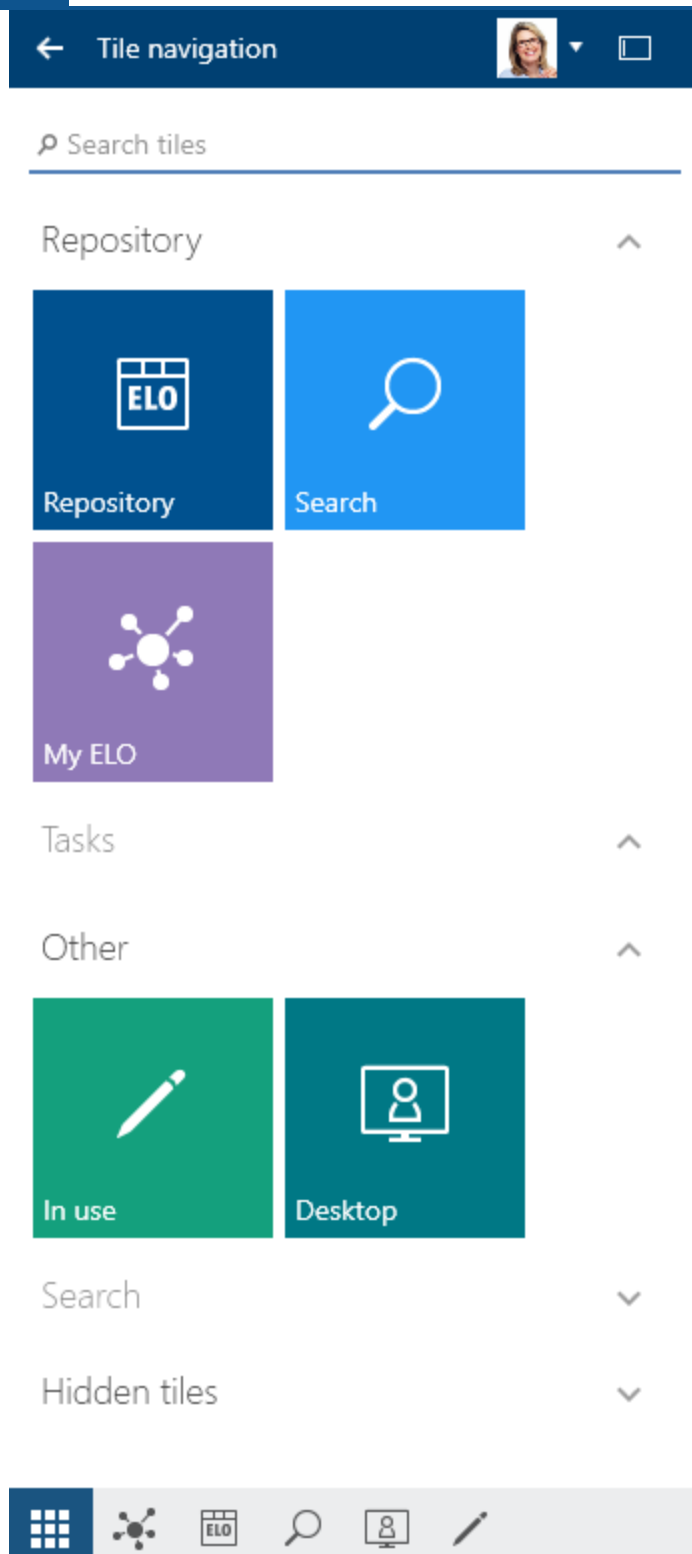
You can pin entries you need regularly by clicking the pin icon.

Under *User menu [your name] > Configuration > Display > List of recently used entries*, you can configure how many entries the list should contain.

**Tile navigation**

The *tile navigation* is the ELO start screen. Tiles can be used to represent work areas, views, and ELO apps. Clicking a tile takes you straight to the corresponding area.

You can open the *tile navigation* from the navigation bar or with CTRL + 0.



Search tiles: While entering a search term, the results are narrowed down to the appropriate tiles thanks to the *search-as-you-type* function. The matches are highlighted in the tiles.

You can create tiles for quick access to folders, tasks, and searches. Use the function *New view* (available in: 'View' group > View).



You can edit, group, and hide tiles using the context menu (right-click).

ELO Desktop Client Plus also has a Tasks tile.

### Edit tile

You can edit the following settings within the group context menu.

- Settings: You can set the color and size of the tile and choose an icon.
- Pin to the navigation bar or Unpin from the navigation bar: This function places the tile on the navigation bar or removes it. Pinning tiles makes it easier for you to switch between the work areas.
- Shrink tile
- Hide: When you hide tiles, they are moved to the *Hidden tiles* area. To restore the tile, drag it to the desired location in the tile navigation.

### Groups

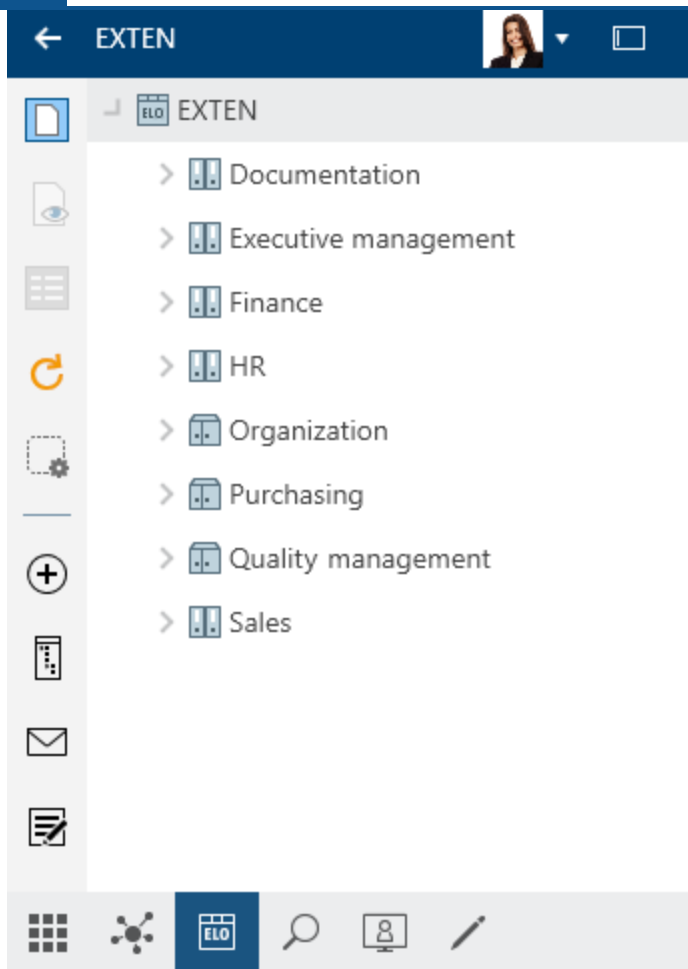
You can change the order of the tiles and their allocation to groups via drag-and-drop.

- Add group
- Rename group: This function is only available for your own groups. You can also access the *Rename group* dialog box by pressing the F2 key.
- Delete group: All tiles in the deleted group are moved to the *Hidden tiles* group.
- Restore default settings: This option enables you to revert changes to tiles and groups in the tile navigation area and restore the default values.

### Repository

You can manage all folders and documents filed in ELO in the Repository work area.

You can open the *Repository* work area from the navigation bar or with CTRL + 1.



You can use the functions in the toolbars to manage the entries.

For a detailed description of each component, refer to the Important components chapter.

If there are a lot of documents in your repository, it can be helpful to create an additional view. You can learn how to create a view in the Create tiles chapter.

## Search

In the *Search* work area, you can search through folders and documents in the *Repository* work area.

Different filters are available. For searches you need regularly, you can create search favorites, which enable fast searches.

You can open the *Search* work area from the navigation bar or with CTRL + 6.

The screenshot shows the ELO Desktop Client search interface. At the top, there is a search bar with a back arrow and a search icon. Below the search bar, there are search options and synonyms. The search results are displayed in a list format. A sidebar on the left contains various icons for navigation. At the bottom, there is a search bar with a filter icon and a search icon.

1 Search field with search options: When you enter a search term, suggestions and synonyms are shown below the search field. To add search filters, select [Search options \(filter icon\)](#).

2 Dashboards: A button is available in the search results that allows you to launch dashboards after conducting a search with a metadata form filter. This button is only displayed if dashboards have been configured for the corresponding metadata form. Dashboards can only be created with generation 2 metadata.

3 Invoice Contelo

1 from 9/27/2021 10:35 AM

Outgoing invoice

09/14/2021

Invoice Smith

1 from 9/27/2021 10:34 AM

Outgoing invoice

09/14/2021

EX10\_03/11/2019\_Invoice\_Contelo

1 from 9/27/2021 10:24 AM

Outgoing invoice

09/14/2021

Offer-Zastry\_2020\_0001

4 from 4/9/2021 2:58 PM

Outgoing invoice

06/05/2020

Contelo

1 from 4/9/2021 2:52 PM

Outgoing invoice

04/12/2016

invoice 10 x

1 Search field with search options: When you enter a search term, suggestions and synonyms are shown below the search field. To add search filters, select [Search options \(filter icon\)](#).

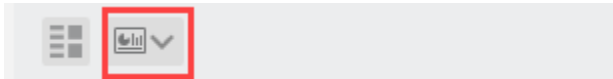
2 Dashboards: A button is available in the search results that allows you to launch dashboards after conducting a search with a metadata form filter. This button is only displayed if dashboards have been configured for the corresponding metadata form. Dashboards can only be created with generation 2 metadata.

3 Results list: You can either view the results in a table or detailed view (list view). By selecting *Filter*, you can narrow down the results in the list. The search field next to the magnifying glass icon also allows you to narrow down the results.

4 Search views: Search requests are temporarily saved as search views. Clicking the plus icon creates a new search view. Search views are deleted when you close ELO.

The Narrow down a search request chapter explains each of the search elements and how to perform a search.

## Dashboards

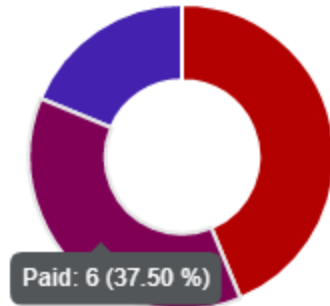


Dashboards are created by the administrator. They can only be created with generation 2 metadata.

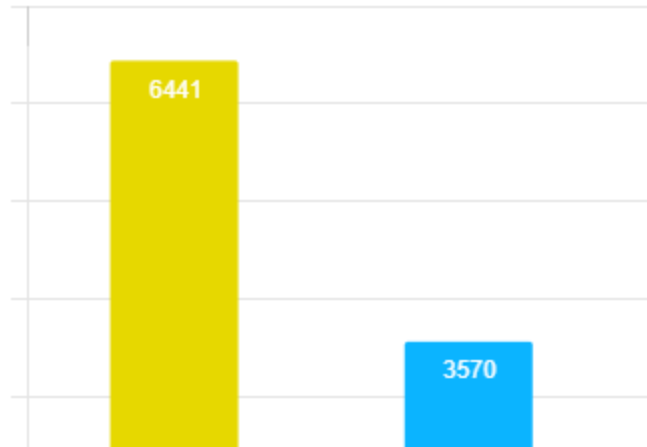
The dashboards allow you to visualize metadata of entries filed with the same metadata form in different ways. You can use bar charts, line charts, and doughnut charts.

## Dashboards - Invoice status

Invoice status









Invoice amount by company

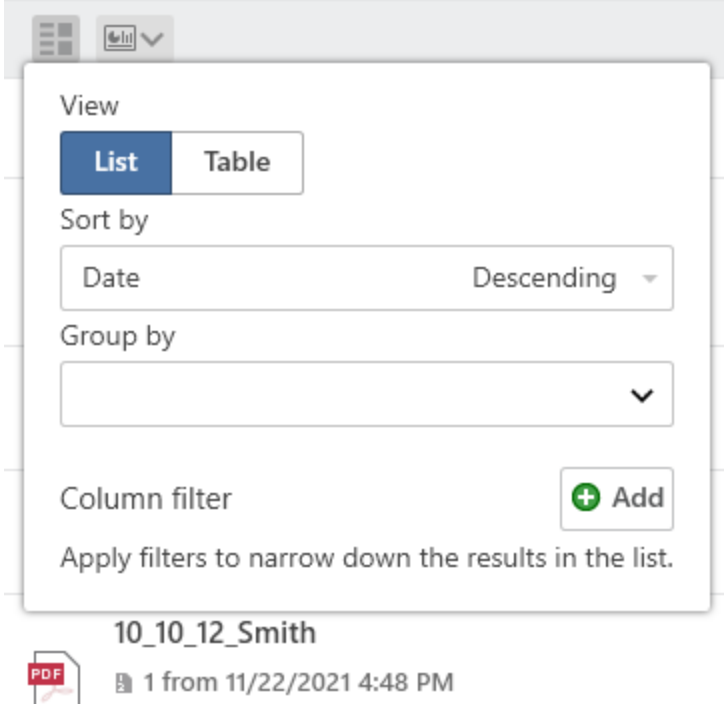


Move the cursor over the charts on the dashboard to view details.

**Results list**

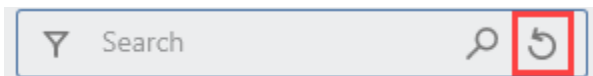
	
<b>Invoice_Contelo</b>	
	1 from 9/27/2021 10:35 AM
	Outgoing invoice 09/14/2021
<b>Invoice Smith</b>	
	1 from 9/27/2021 10:34 AM
	Outgoing invoice 09/14/2021

The *Sort*, *group*, and *filter* button provides different options for organizing the results list.



## Input

Enter one or more search terms into the search field. While entering a search term, the *search-as-you-type* function provides search suggestions in a drop-down menu.



Select the *Reset search* button to restore the default search settings.

**AND search:** If you enter two terms into the search field, the system will search for entries that contain both terms.

**OR search:** If you enter two terms into the search field and separate them with a comma (e.g., order, invoice), the system searches for entries that include at least one of the terms.

**Exclude term:** To exclude a term from your search, enter it in the search field and put a minus sign in front of the term. For example, a search for -document excludes entries that contain the term *document*. You can combine the negated term with other terms that you do not negate.

**Phrase search:** To search for multiple related terms, enter the terms in the search field with quotation marks, e.g., "social media". Only entries that contain all the terms in the order entered will be found. The search is not case sensitive.

### Please note

If you search for NOT, OR, or AND via the search field or filters, you may encounter issues during your search.

## Search options



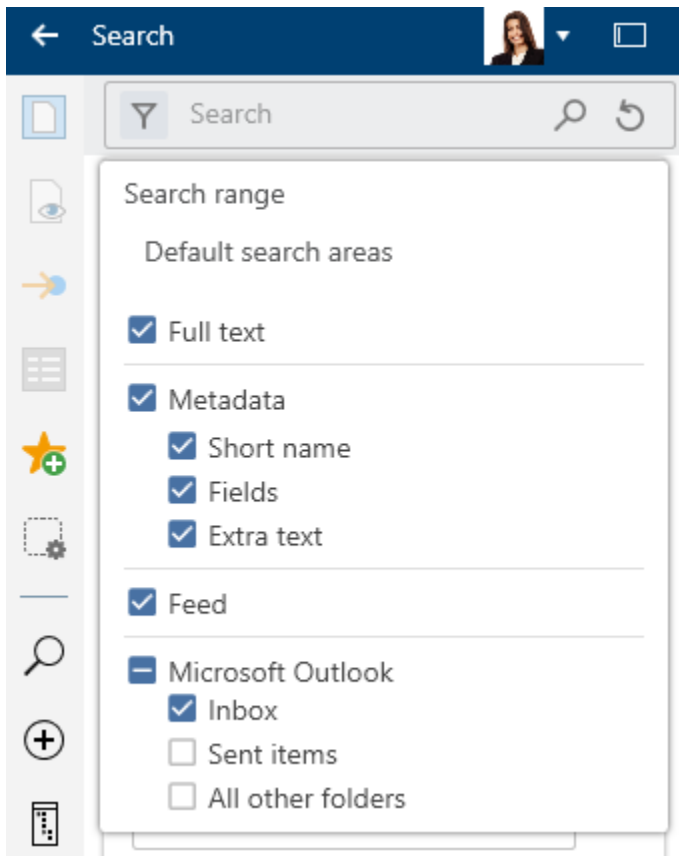
The *Search options* button provides the following options to narrow down your search:

- Search areas
- Search filters

To automatically open the search options when performing a new search, check the box in *Configuration > Display > Search*.

### Search areas

You can limit your search to specific areas.

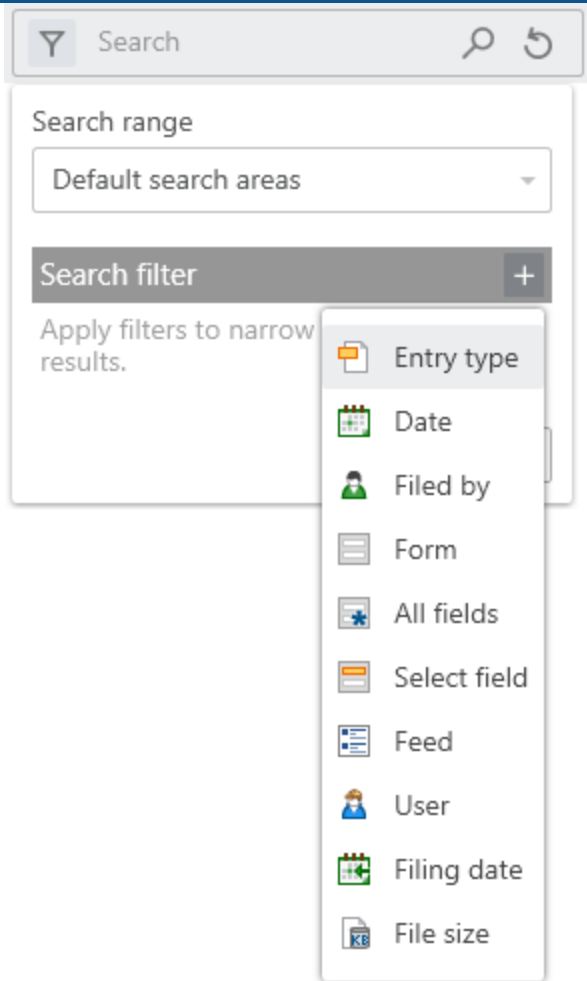


Use the *Search range* menu (filter icon) to make your settings.

With the *Default search areas* settings, only the Microsoft Outlook Inbox is searched. Refer to the Manage e-mails section to learn how to perform a combined search in ELO and Microsoft Outlook.

### Search filters

Filters allow you to narrow down your search using metadata, such as the filing date.



To apply a filter, select *Search options > Search filters > Plus icon*. Select the required filter from the list. Specify the filter via the drop-down menu.

To remove a selected filter, select the X icon.

You can add multiple filters of the same type.

#### Negate filters

You can apply reverse filters. For example, if you select a user in the *Filed by* filter and set the filter to *does not contain*, only entries that were not processed by this user are shown. It is not possible to only negate individual filters or facets.

To negate a selected filter, right-click the filter and then click *does not contain*.

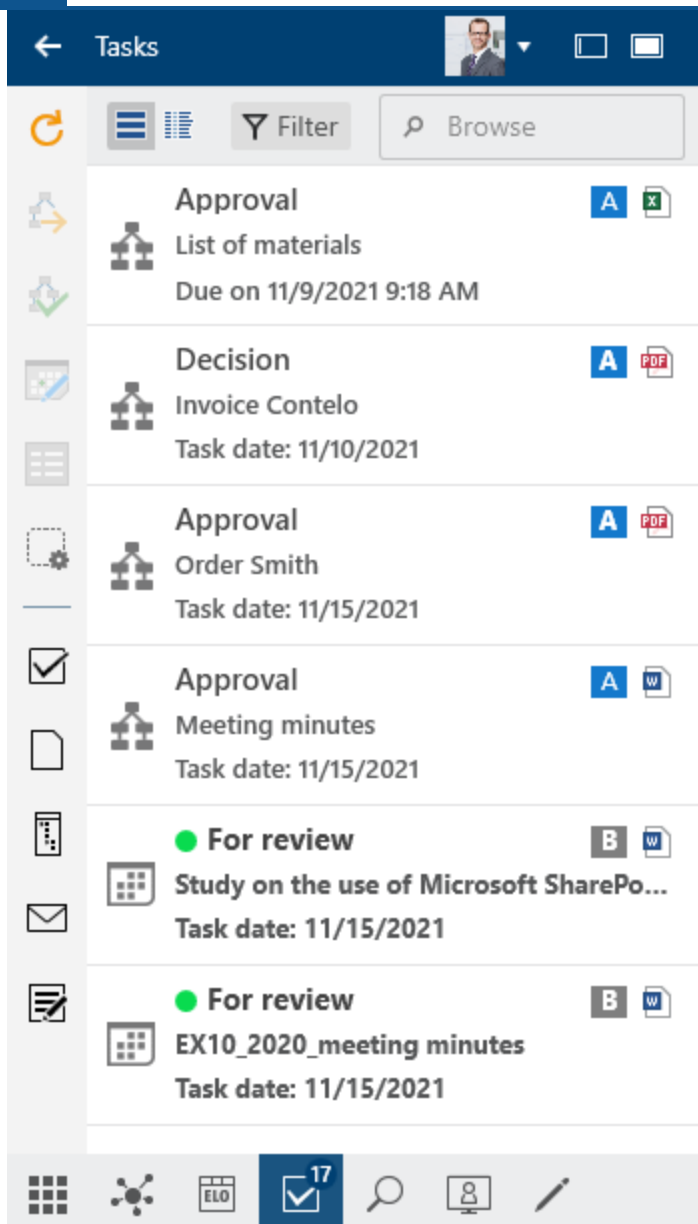
### Tasks (only ELO Desktop Client Plus)

In the *Tasks* work area, you will find a list of your tasks.

You can open the *Tasks* work area from the navigation bar or with CTRL + 4.

To learn how to process tasks, refer to the Process workflow section.





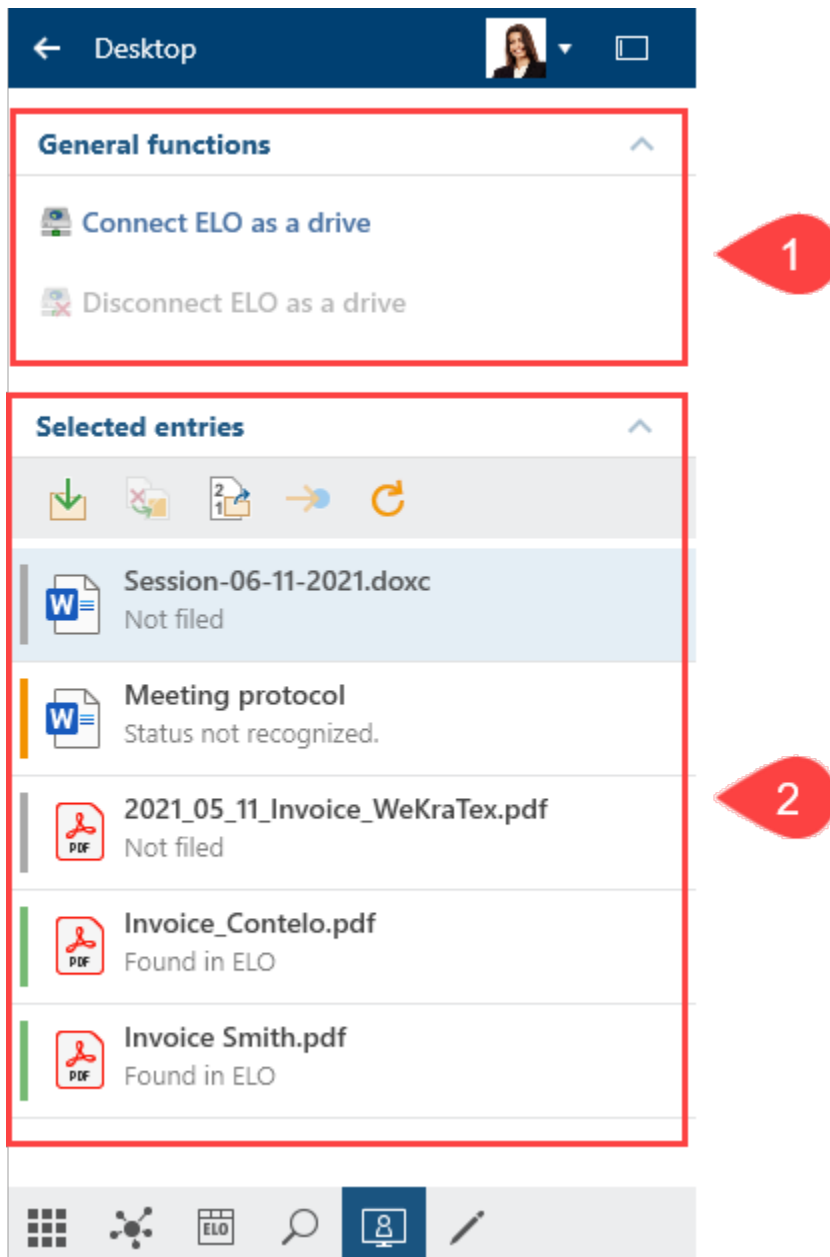
For more information about the *Tasks* work area, refer to the chapter ELO Desktop Client Plus.

## Desktop

The *Desktop* work area acts as an interface between ELO and Windows. In this area, you will see an overview of entries currently selected at the file system level. The client indicates if the document is filed to the repository. The functions available depend on the status of the document.

You can open the *Desktop* work area from the navigation bar or with CTRL + 8.

## Not connected to ELO



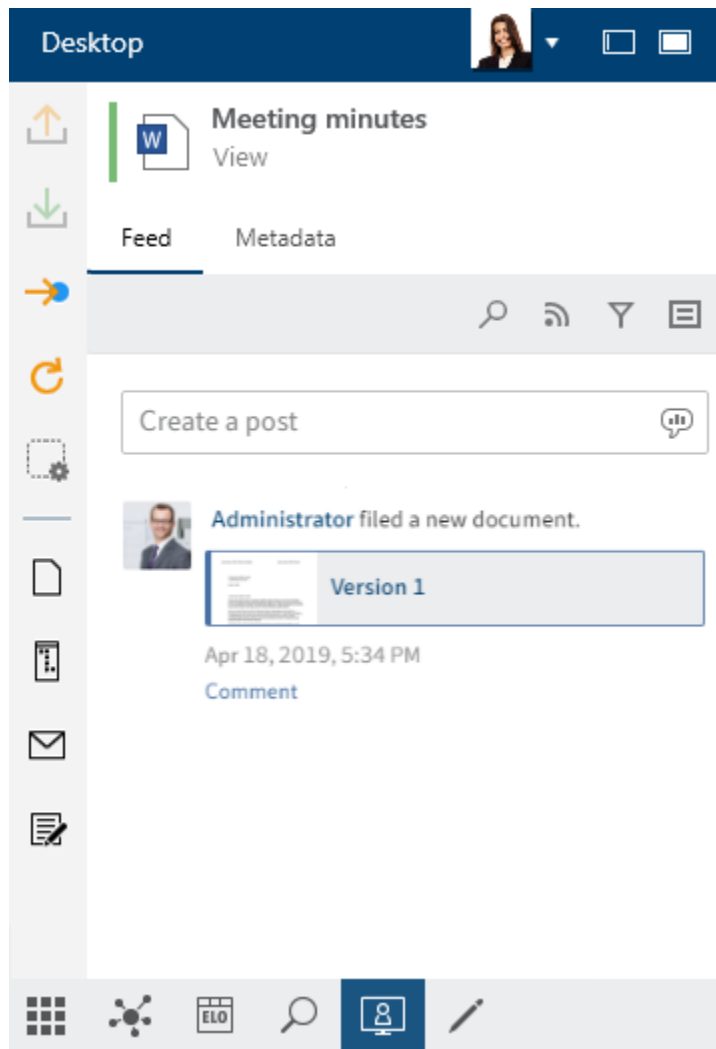
1 General functions: When the Windows Explorer is open, the general functions *Connect ELO as a drive* and *Disconnect ELO as a drive* are offered. To connect a WebDAV network address, select *Connect ELO as a drive*.

- **Connect ELO as a drive:** You can integrate the entire ELO repository into your local file system. You can then access documents without logging on to ELO. Additional information, such as the metadata or feed, is only available after logging on.
- **Disconnect ELO as a drive:** You can disconnect the drive connected to the local file system.

2 Selected entries: Shows the selected entries in the Windows Explorer or Windows Desktop. Depending on the status of the selected entry, various functions are available: *File*, *Replace with*

ELO link, File as a new version, Go to, and Refresh. A bar before the entry indicates the status: *Filed to ELO* (green), *In use* (yellow), or *Not filed* (gray).

### With ELO connection



The example shows the *Desktop* work area with the Windows Explorer open and ELO integrated in the local file system. Unlike the normal Windows Explorer view, the toolbar and favorites bar are both available.

#### Information

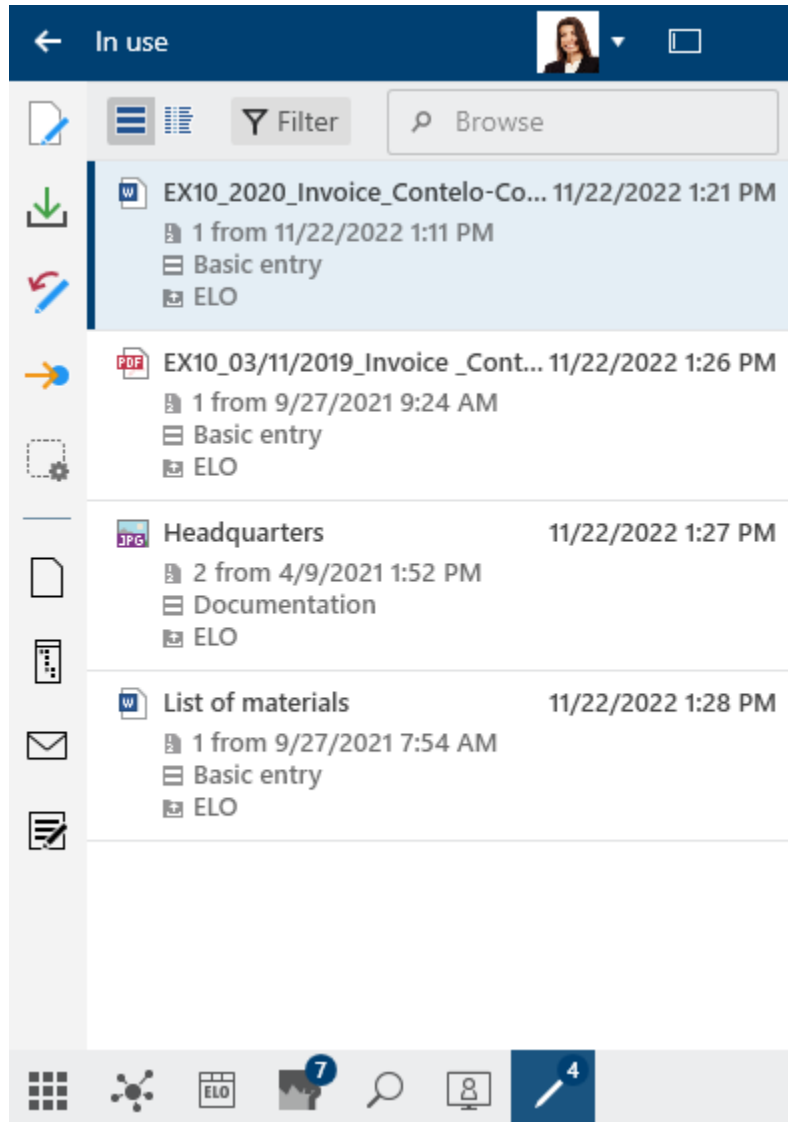
The toolbar and favorites bar are also available when selecting an ELO link in the Windows Explorer or Windows Desktop.

The short name of the entry is displayed in the viewer pane. The *Feed* tab contains posts, polls, and comments on the entry. You can create a feed post or a comment. All fields are shown in list form on the *Metadata* tab.

## In use

The *In use* work area displays documents you have checked out for editing. Documents in the *In use* work area are locked for all other users.


You can open the *In use* work area from the navigation bar or with CTRL + 5.



In the list of documents checked out for editing, you see the documents currently checked out or being edited. You can switch between the list view and table view using the two buttons at the top left. By selecting *Filter*, you can sort, group, and filter to narrow down the list. The search field next to the magnifying glass icon also allows you to narrow down the results with its *search-as-you-type* function.

## Header

The header is shown in all work areas.

The header bar is dark blue. It contains a white left-pointing arrow, the text "Tile navigation", a small square profile picture of a woman, a small downward-pointing triangle, and a small square icon with a horizontal line.

The header indicates the work area you are currently in. The left arrow takes you back to the last work area you were in. You can open the *User menu* by selecting your profile picture. This menu takes you to areas where you can configure settings for your account. You will find the following here: *Configuration*, *Help*, *Enable roles* (optional), *About*, *Log off*, and *Close*. For more information, refer to the chapter *User menu [your name]*.

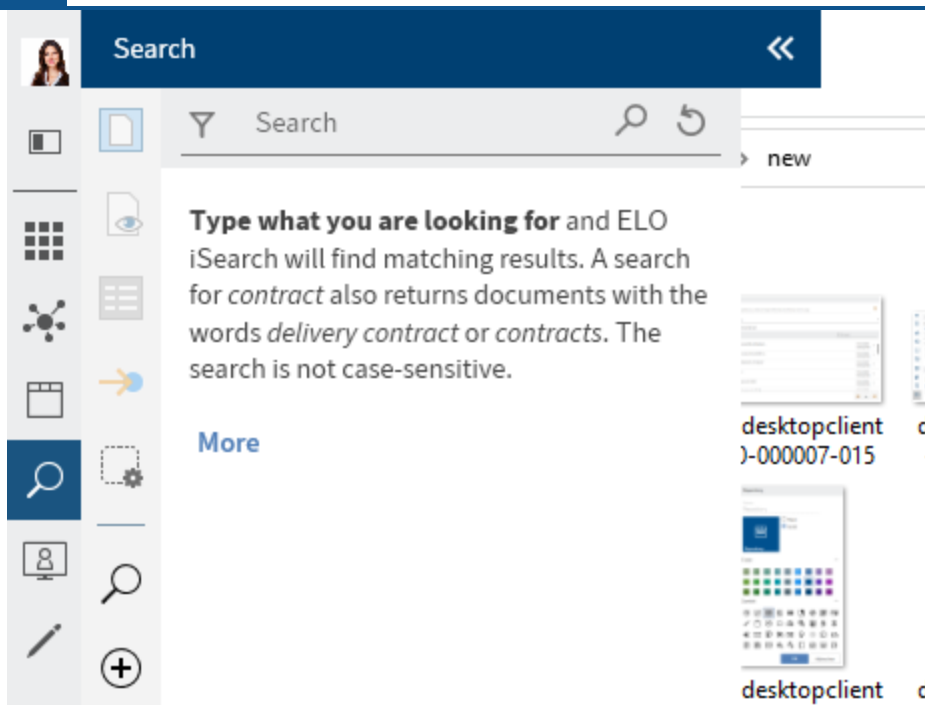
With the buttons next to the user menu, you can switch between the default view and the lean view. The desktop adapts to the view dynamically.

An additional button is available in ELO Desktop Client Plus that allows you to open ELO in full-screen mode.



You can use the buttons in the lean view to reach the user menu and the work areas, as well as to switch views.

To expand the work area, select the relevant button.



When expanding a work area in the lean view, the desktop does not adapt and may be covered. To ensure smooth interaction between the desktop and ELO, we recommend the default view. The two arrows collapse ELO again.

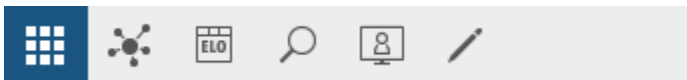
## Toolbars

Various toolbars are available in ELO. These toolbars give you access to functions or work areas.

The following toolbars are available:

- Navigation bar
- Toolbar
- Favorites bar

## Navigation bar



The navigation bar is located at the bottom of ELO. This toolbar is always available, no matter which work area you are in.

This toolbar gives you access to the following areas:

- Tile navigation
- *My ELO* work area
- *Repository* work area
- *Search* work area
- *Desktop* work area
-

*In use* work area

- *Tasks* work area (only ELO Desktop Client Plus)

## 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 toolbar contains all functions you can use in the respective work area. These vary depending on the work area.

The toolbar is organized in groups. Some groups are always shown (default groups), while others only appear when the group functions can be used (contextual groups).

The default groups are:

- New
- View
- Output
- Organize

The contextual groups are:

- Document: This group appears when you select a document.
-

Search: This group is only available in the *Search* work area.

- Tasks: This group is only available in the *Tasks* work area (only ELO Desktop Client Plus).

The functions available depend on your selection. You will see a star icon next to each function. Clicking this star adds the function to your favorites bar. You can also add other buttons, such as for an ELO Business Solution, to the toolbar via the ELO App Manager.

### Favorites bar



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.

Manage favorites





Select *Manage favorites* to organize your favorites. All functions of the area are listed here, sorted by function groups. Select the functions you want to have in your favorites list.

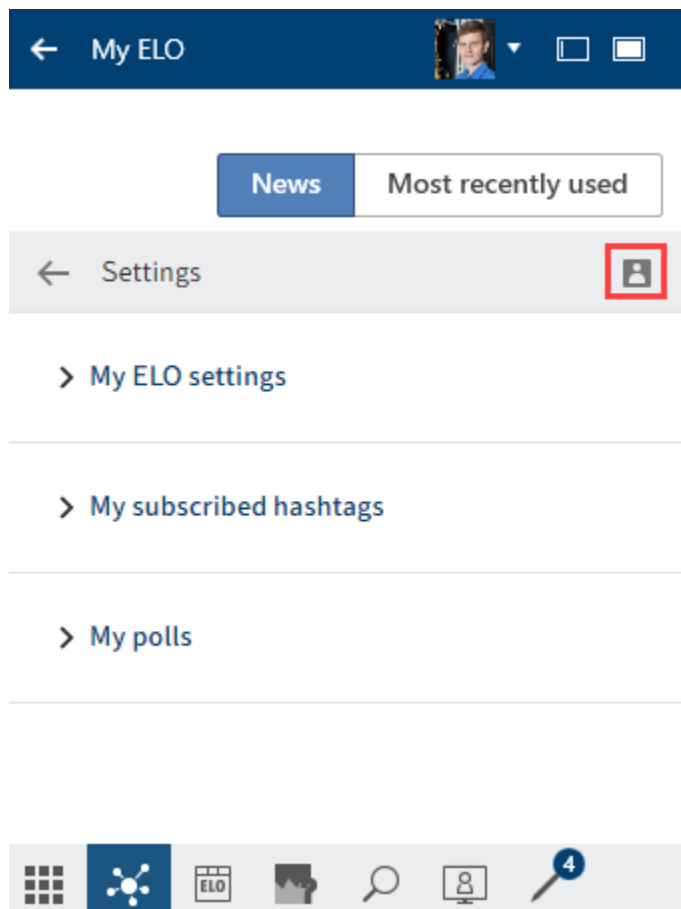
For more information on configuring your favorites bar, refer to the Favorites bar chapter.

## User menu [your name]

User menu [your name]

Selecting the *User menu [your name]* button opens a drop-down menu. This menu takes you to areas where you can configure settings for your account. You can also log off at the end of your session and close ELO.

## Profile




In your profile, you can enter information on your professional background, your contact details, and upload a profile picture.

### Method

1. To view and edit your profile, go to the *My ELO* settings and select the *My profile* button (person icon).

User profile

Anderson



Edit profile picture

Anderson

ELO Digital Office


Miami

Office


8.3

Abbreviation

A.An



1234/56789

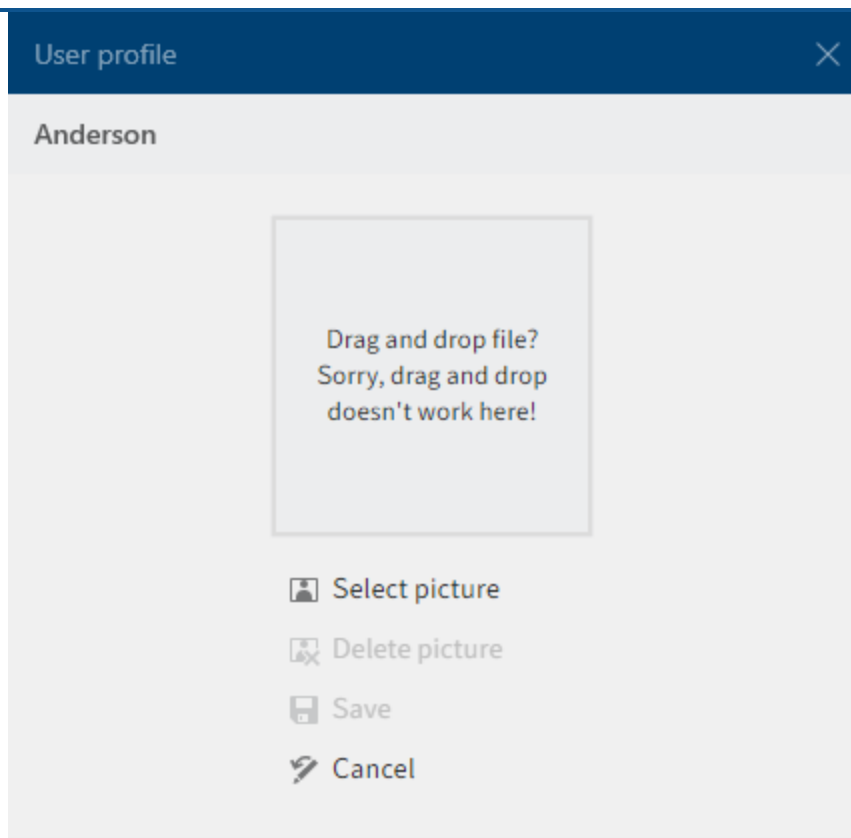


9876/54321

Edit data

The *User profile* dialog box opens.

2. Select *Edit profile picture*.



The dialog box for editing your profile picture opens.

3. Select *Select picture*.

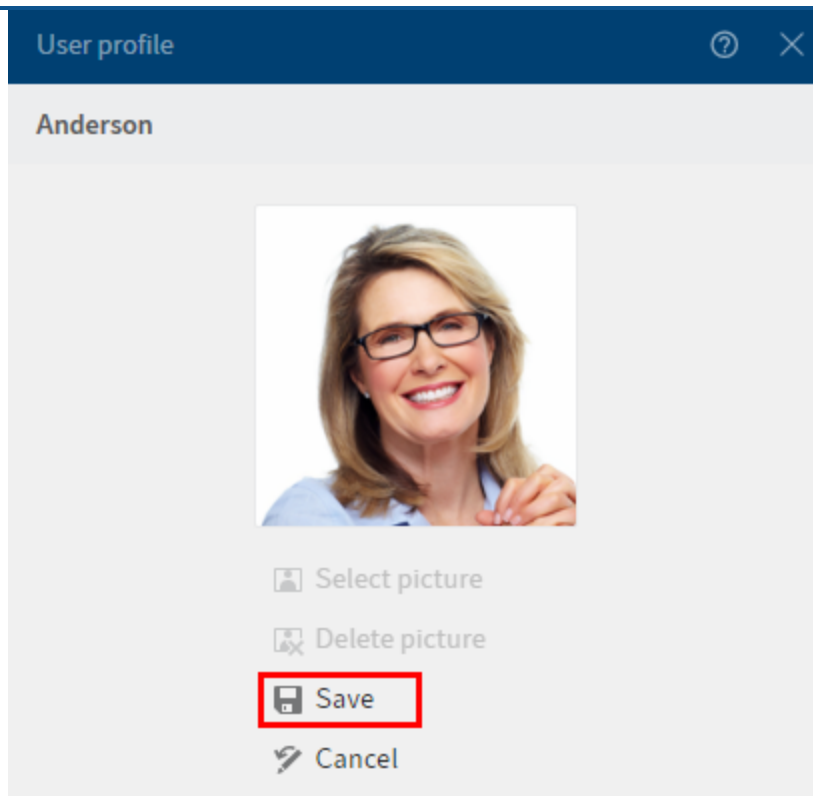
A Windows dialog box for selecting a file appears.

### Information

Use PNG, JPG, or GIF image files with a minimum of size of 280 x 280 pixels.

4. Select the desired image file.
5. Select *Open*.

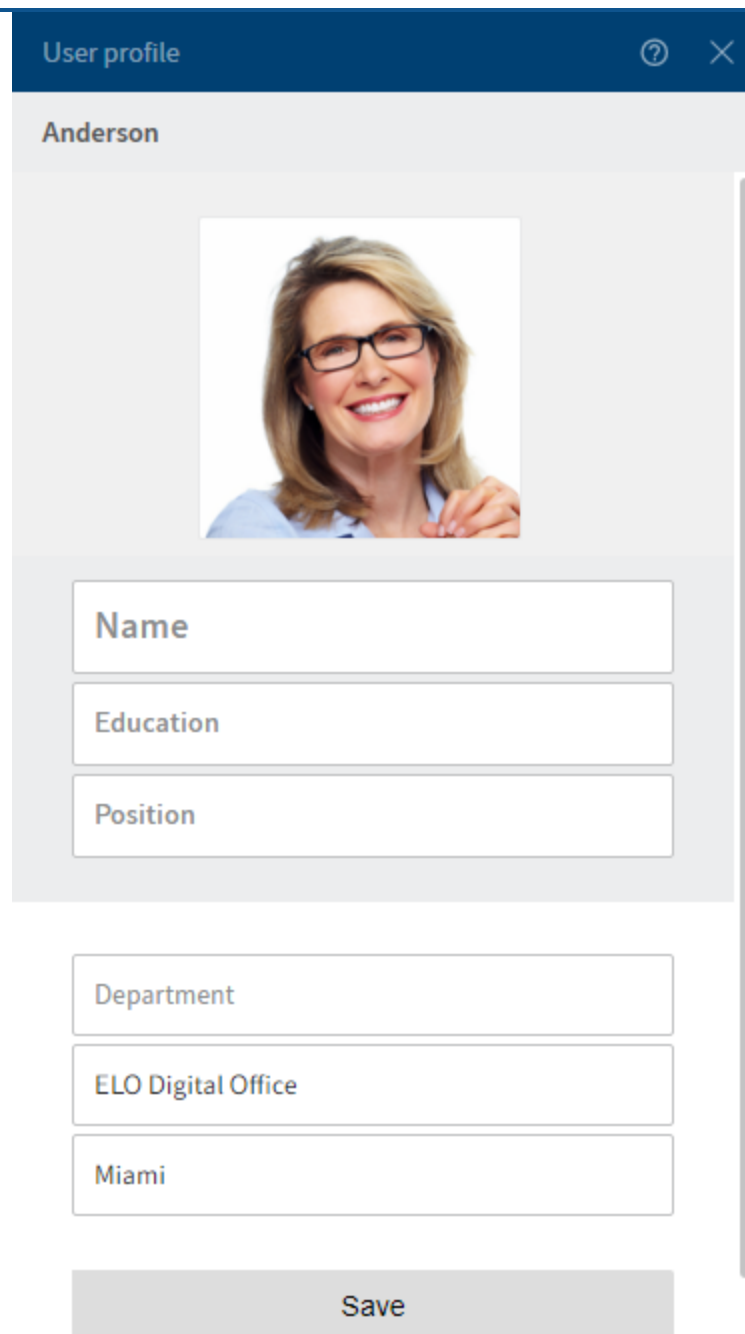
The file is uploaded.



The user profile with the selected profile picture appears.


6. To apply the profile picture, select *Save*.

7. To edit your profile, select *Edit data*.



User profile

Anderson



Name

Education

Position

Department

ELO Digital Office

Miami

Save

The *Edit data* dialog box opens.

8. Enter the respective data in the input fields.

9. Select *Save*.

Result

The user profile has been updated.

## 'My ELO' button



Use the *My ELO* button to open the *My ELO* work area.

Keyboard shortcut: CTRL + 7

This area contains your news and most recently used entries.



If *My ELO* is highlighted in green, you have news in *My ELO*.

## Navigation and use

### Navigating between work areas

To switch from one work area to another, you have the following options:

- Tile navigation: Open the *Tile navigation* via the navigation bar to switch to the desired work area via the respective tile. This option is always available.
- Navigation bar: Select the desired work area right in the navigation bar. This option is always available.
- Keyboard shortcuts: There are several keyboard shortcuts. With these keyboard shortcuts, you can open the different work areas or run functions. You will find the keyboard shortcuts in the Configuration under *General > Keyboard shortcuts*.

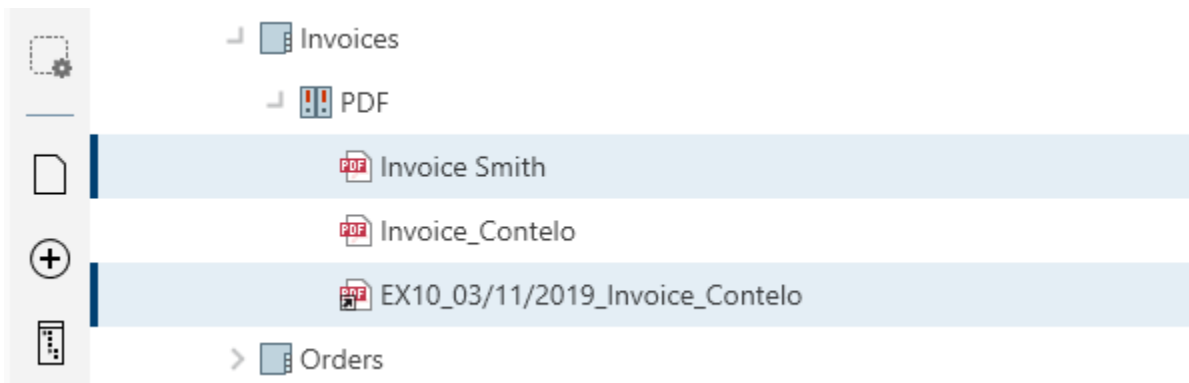
### How do I use a function?

Functions can only be selected if they can be used in the current context. Otherwise, they are grayed out or are not displayed at all. Most functions are contextual. To use them, you must establish a reference to an entry (folder or document) by selecting it. Once you have selected the entry, select the function. In most cases, this opens a dialog box or another control element with instructions on how to proceed.

There are a few functions that are not contextual and can be used at any time. These functions are not related to selected entries, such as *Refresh*.

### How do I select multiple entries?

You can select multiple folders or documents at once to execute a function on all selected entries.



#### Method

1. Press and hold the CTRL key and select the corresponding entries. If you want to select all entries or all entries you want to select are in a row, press the SHIFT key then select the top-most and bottom-most entry you want to select.
2. On the toolbar, select the function you want to use, e.g. *Send as ELO link*.



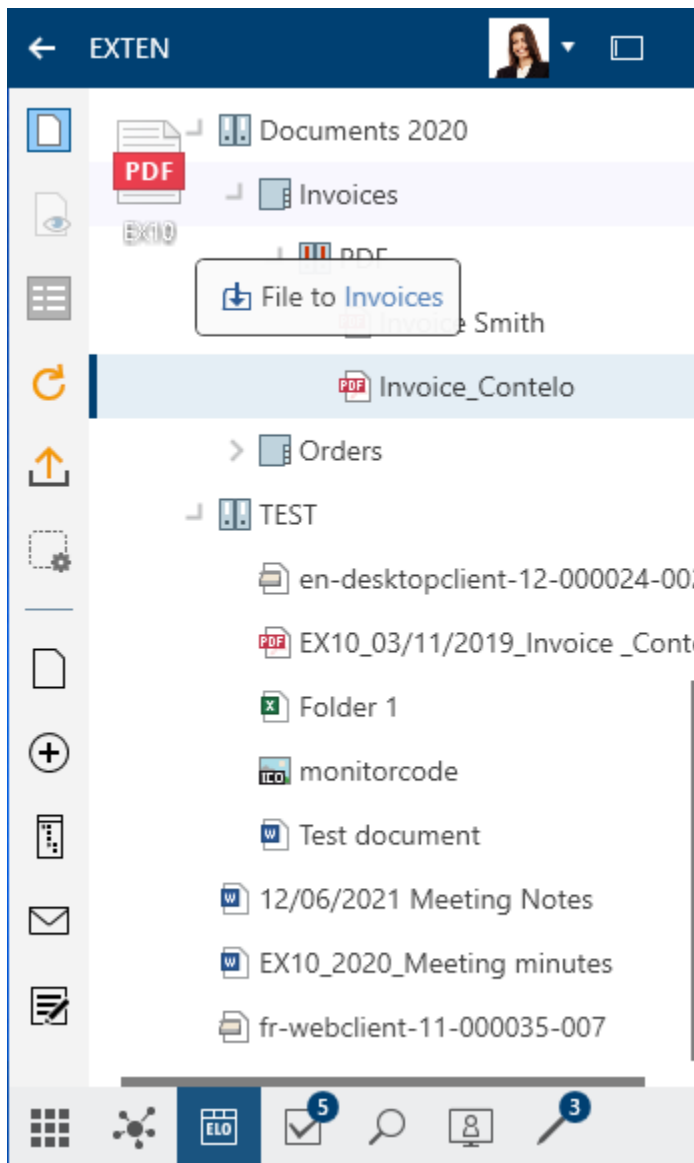
## Drag-and-drop

You can also execute some functions using a drag-and-drop action.

### Insert files/folders

Method

1. Open the *Repository* work area and navigate to the folder where you want to file the file.
2. Select the file in the file system that you want to file and drag it to the folder where you want to file it.



The *Metadata* dialog box opens.

3. Select a metadata form and enter the metadata.

**Information**

For more information on the individual fields, refer to the chapter Metadata.

4. Select *OK*.

Result

The file is filed to ELO.

**Move or reference entry**

Select the entry you want to move and drag it to the target folder holding down the mouse button.

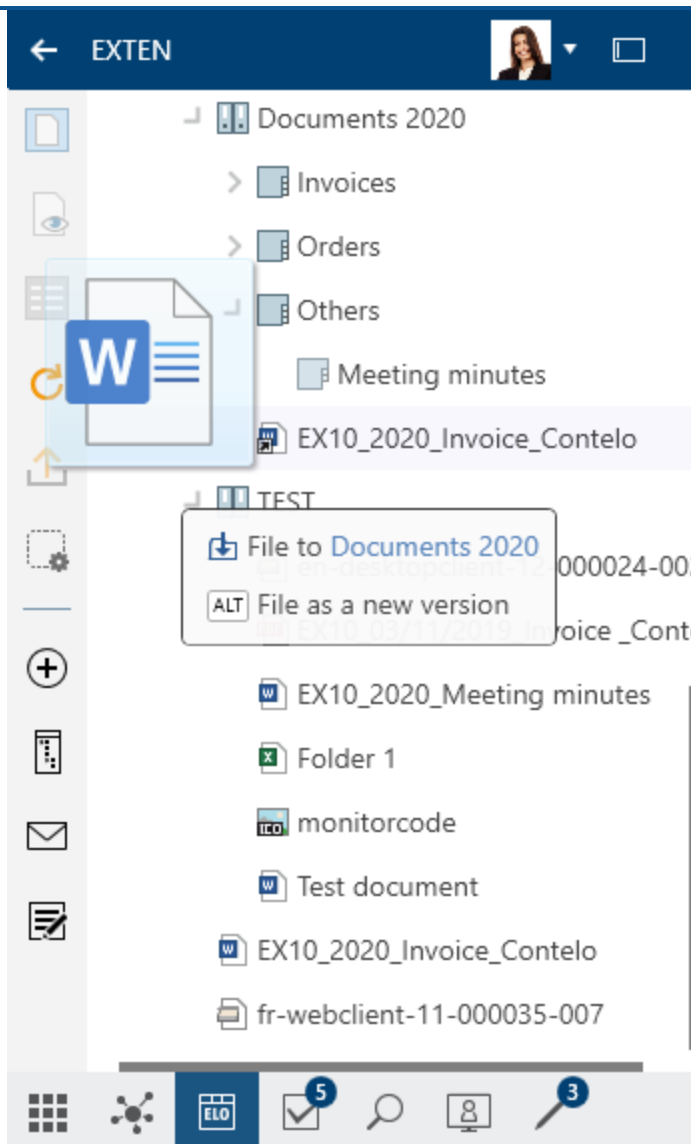
If you want to reference the entry, press the ALT key.

For more information, refer to the 'Reference' function section of the '*Organize*' group chapter.

**Load new version**

Method

1. Select the document in your file system you want to file as a new version and drag it to the document in ELO holding down the mouse button.



2. Press the ALT key and release the mouse button to file the document as a new version.

The *Version comment* dialog box appears.

Optional: Depending on the setting, the *Version comment* dialog box may now open. If this is the case, you can enter the version number and relevant comments. This dialog box can be enabled or disabled in *Configuration > Dialog boxes > Version comment*.

3. Complete the fields.

Non-deletable version: If you check the box next to this option, this version of the document cannot be deleted. This does not mean that you cannot file a new version. You simply cannot delete it from the overview of document versions.

4. Select *OK*.

Result

The document is loaded as a new version.

## Keyboard control

You can navigate your repository using the keyboard. You have the following options, among others:

- Navigate up or down in the tree view: ARROW UP or ARROW DOWN
- Open or close folder: ARROW RIGHT or ARROW LEFT
- Open document in an external program: ENTER
- Select multiple entries: Select an entry and then CTRL + ARROW UP/ARROW DOWN

## Help

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

This takes you to the help for ELO. If you need information about a specific dialog box, select the question mark next to the X icon in the dialog box.

## Refresh

The *Refresh* function refreshes your view. The data is read from the repository again.

Keyboard shortcut: F5 key

## Go to

The *Go to* function opens the filing location of the selected entry. It is available in the *In use*, *Search*, *Desktop*, and *Tasks* (only ELO Desktop Client Plus) work areas.

Keyboard shortcut: CTRL + G

## Context menu

Right-click an entry to open the context menu. Alternatively, use the menu key of a selected entry. The context menu contains selected functions that you will also find in the toolbar.

The context menu can contain different functions depending on the work area you are in.

## Accessibility

### Compatibility

ELO is compatible with NVDA, Windows Narrator, and JAWS screen readers.

### Contrast settings

The contrast settings are adopted from Windows. This means that the colors you set in Windows contrast mode are also used in ELO.

ELO automatically adjusts if a contrast theme is enabled in Windows.

### Keyboard shortcuts

You can operate ELO using the keyboard. The following tables contain an overview of the keyboard commands sorted by the areas in which they can be used.

#### General

Function	Keyboard shortcut	Note
Tile navigation	CTRL + 0	Configurable
Open <i>Repository</i> work area	CTRL + 1	Configurable
Open <i>Search</i> work area	CTRL + 6	Configurable
Open <i>My ELO</i> work area	CTRL + 7	Configurable
Open <i>Desktop</i> work area	CTRL + 8	Configurable
Open <i>In use</i> work area	CTRL + 5	Configurable
Open <i>Tasks</i> work area (only ELO Desktop Client Plus)	CTRL + 4	Configurable
Help	F1	If available.
Minimize ELO	WINDOWS + UP ARROW	
Move ELO to the left	WINDOWS + LEFT ARROW	
Move ELO to the right	WINDOWS + RIGHT ARROW	
Navigate back (1)	BACKSPACE	
Navigate back (2)	ALT + LEFT ARROW	
Switch to the next area	F6	
Switch to the previous area	CTRL + F6	
Go to	CTRL + G	
Refresh	F5	
Metadata	F4	
Upload feed post	CTRL + ENTER	

## Tile navigation

Function	Keyboard shortcut	Note
Launch tile (1)	ENTER	
Launch tile (2)	Spacebar	
Rename tile group F2		Focus must be on the tile in the group.

## 'Repository' work area

Function	Keyboard shortcut	Note
Open preview	Spacebar	
Metadata	F4	
Refresh	F5	
Open in read-only mode (1)	CTRL + O	
Open in read-only mode (2)	ENTER	
Check out and edit	ALT + O	
Edit document	CTRL + E	
Check in	ALT + I	
Create new folder	INS	
Reference	CTRL + R	
Copy	CTRL + C	
Cut	CTRL + X	
Paste	CTRL + V	
Print	CTRL + P	
Delete	DEL	
Save as	CTRL + S	
Move entry up	ALT + UP ARROW	
Move entry down	ALT + DOWN ARROW	
Create ELO link on drag-and-drop	CTRL	Hold down CTRL when dropping. Configurable.
Create HTML link on drag-and-drop	ALT	Hold down CTRL when dropping. Configurable.
Create reference on drag-and-drop	ALT	Hold down CTRL when dropping. Only works in the tree view.
Go to the top-level entry	POS1	Focus must be on the tree.
Open folder	RIGHT ARROW	Focus closed folder.
Close folder	LEFT ARROW	Focus opened folder.
Go to the first child entry	RIGHT ARROW	Focus opened folder.

Function	Keyboard shortcut	Note
Go to the parent folder	LEFT ARROW	Focus entry.
Shift focus	CTRL + ARROW keys	The selection is not changed.
Change selection	CTRL + spacebar	

### 'Search' work area

Function	Keyboard shortcut	Note
Start search	ENTER	Focus search input field.
Go to	CTRL + G	
Open preview	Spacebar	
Metadata	F4	
Refresh	F5	
Open in read-only mode (1)	CTRL + O	
Open in read-only mode (2)	ENTER	Focus result.
Check out and edit	ALT + O	
Edit document	CTRL + E	
Check in	ALT + I	
Create new folder	INS	
Print	CTRL + P	
Delete	DEL	
Copy	CTRL + C	
Paste	CTRL + V	Only works for folders.
Save as	CTRL + S	
Select next search (1)	CTRL + TAB	
Select next search (2)	RIGHT ARROW	Focus must be on the <i>Search</i> tab.
Select previous search (1)	CTRL + SHIFT + TAB	
Select previous search (2)	LEFT ARROW	Focus must be on the <i>Search</i> tab.
Open new search	CTRL + N	
Close search (1)	CTRL + F4	
Close search (2)	DEL	Focus must be on the <i>Search</i> tab.
Focus search results	CTRL + L	Search must have been performed.

### 'Tasks' work area (only ELO Desktop Client Plus)

Function	Keyboard shortcut	Note
Go to	CTRL + G	
Open preview	Spacebar	

Function	Keyboard shortcut Note	
Metadata	F4	
Refresh	F5	Refreshes all tasks.
Open in read-only mode	CTRL + O	
Forward workflow	ENTER	
Delete	DEL	
Save as	CTRL + S	
Copy	CTRL + C	
Paste	CTRL + V	Only works for folders.

### 'Desktop' work area

The *Desktop* work area contains keyboard shortcuts for general and specific functions for the *Explorer*, *Word*, *Excel*, *PowerPoint*, *Outlook*, and *OneNote* areas. If you do not see one of these areas listed here, only general functions apply to that area.

Area	Function	Keyboard shortcut Note	
Explorer	Refresh	F5	
	Go to	CTRL + G	For .ecd and stored files.
	Open in read-only mode	CTRL + O	For .ecd and stored files.
	Check in	ALT + I	For .ecd and stored files.
	Check out and edit	ALT + O	For .ecd and stored files.
	Edit document	CTRL + E	For .ecd and stored files.
	Print	CTRL + P	For .ecd and stored files.
	Metadata	F4	For .ecd and stored files.
	Delete	DEL	For .ecd and stored files.
	Close Windows Explorer preview (1)	F6	
	Close Windows Explorer preview (2)	CTRL + F6	
Word	Check in	ALT + I	For stored files.
	Check out and edit	ALT + O	For stored files.
	Edit document	CTRL + E	For stored files.
Excel	Check in	ALT + I	For stored files.
	Check out and edit	ALT + O	For stored files.
	Edit document	CTRL + E	For stored files.
PowerPoint	Check in	ALT + I	For stored files.
	Check out and edit	ALT + O	For stored files.
	Edit document	CTRL + E	For stored files.



**'In use' work area**

Function	Keyboard shortcut	Note
Go to	CTRL + G	
Open preview	Spacebar	
Metadata	F4	
Refresh	F5	
Save as	CTRL + S	Saves the edited document.
Edit document (1)	ENTER	
Edit document (2)	CTRL + E	
Check in	ALT + I	
Print	CTRL + P	

**'My ELO' work area**

Area	Function	Keyboard shortcut	Note
Most recently used	Go to	CTRL + G	
	Delete from list	DEL	
	Change pinned status	CTRL + P	

**Configuration**

Function	Keyboard shortcut	Note
Cancel	ESC	
Undo changes	CTRL + Z	
Redo changes	CTRL + Y	
Save changes	CTRL + S	Only available to administrators
Export settings	CTRL + E	Only available to administrators
Import settings	CTRL + I	Only available to administrators

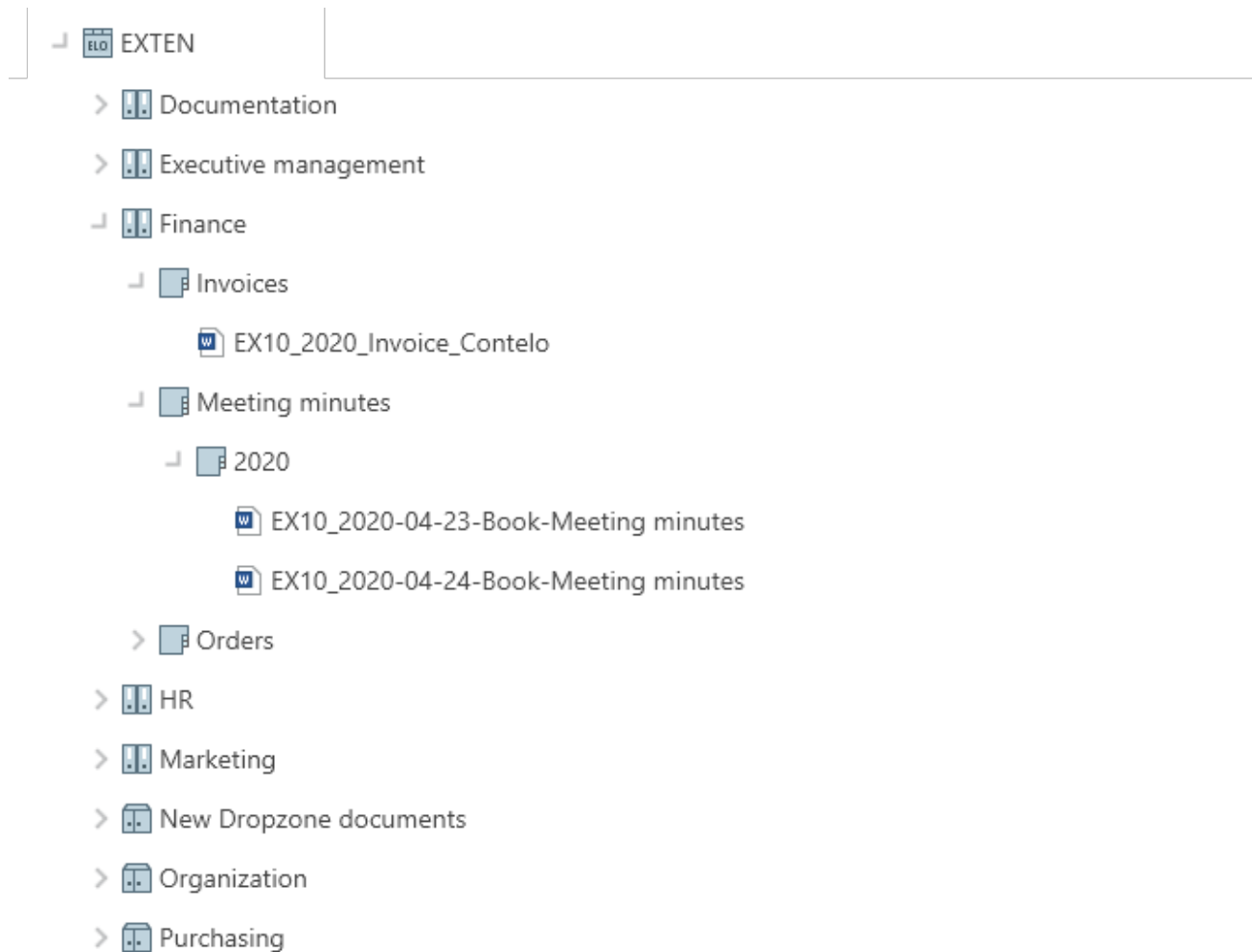
**Dialog boxes**

Area	Function	Keyboard shortcut	Note
General	Cancel	ESC	
	OK	ENTER	Only works if there are no errors.
Permissions	Focus search field	CTRL+F	
	Add/remove R right	R	Permission must be focused.

Area	Function	Keyboard shortcut	Note
	Add/remove W right	W	Permission must be focused.
	Add/remove D right	D	Permission must be focused.
	Add/remove E right	E	Permission must be focused.
	Add/remove L right	L	Permission must be focused.
	Add/remove P right	P	Permission must be focused.
	Remove selected permission	DEL	Permission must be focused.
	Edit permission/finish editing	ALT + 2	Permission must be focused.
	Edit permission	RIGHT ARROW	Permission must be focused.
	Finish editing	LEFT ARROW	Permission must be focused.
	Show/hide members of the selected group	ALT + 1	Permission must be focused.
Document versions	Open in read-only mode	CTRL + O	
	Mark for deletion	DEL	
	Remove deletion marker	INS	
	Save as	CTRL + S	
Links	Delete link	DEL	
	Go to	CTRL + G	
	Switch to permanent link	CTRL + L	Can only be disabled during creation.
Report for entry	Show options	CTRL + O	
	Save as CSV file	CTRL + S	
Manage search favorites	Mark for deletion	DEL	
	Remove deletion marker	INS	
	Rename search favorite	F2	
Select entry	Focus search input	CTRL + F	
	Start search	ENTER	Search input field must be focused.

## Important components

### Repository structure



The repository gives you an overview of all folders and documents that you are authorized to access. Navigate between entries in the repository here.

You have the following navigation options:

- Mouse: Click an entry using the mouse. Clicking the arrow next to the folder expands the contents of the folder in the tree.
- Keyboard: You can navigate up and down the tree using the UP and DOWN arrow keys. Pressing the right arrow key opens a folder. Pressing the left arrow key closes the folder.

### Reference

EX10\_2020\_Invoice

Entries (folders or documents) with an arrow icon are references. Select *View > Go to* on the toolbar to go to the original entry. From the context menu, select *Additional references* to access the original entry or other references to this entry.

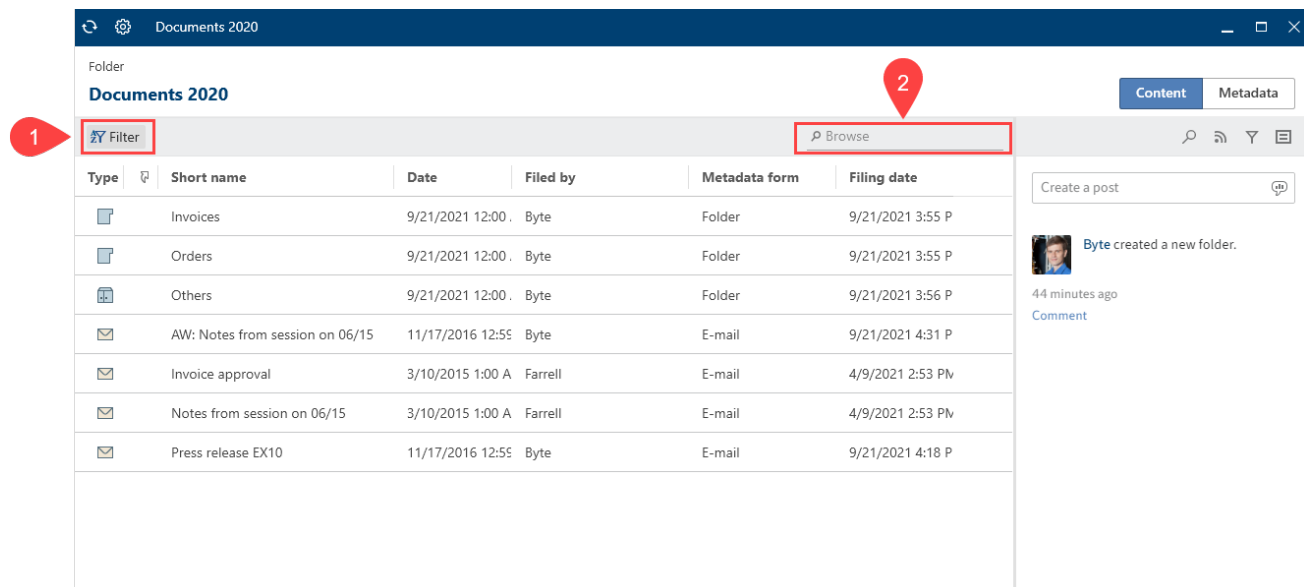
## Checked out document



Documents with a yellow arrow next to the document icon and a name are checked out by the corresponding user. They can be viewed (*Document > Open in read-only mode*), but not edited.

## Folders

In the repository structure, your documents are created in folders. If you've selected a folder, you can view the contents and the child folders in a separate window using the *Preview* function (keyboard shortcut: spacebar).



You can change how the folder is displayed and the sort order (1), or browse the folder by short name (2).

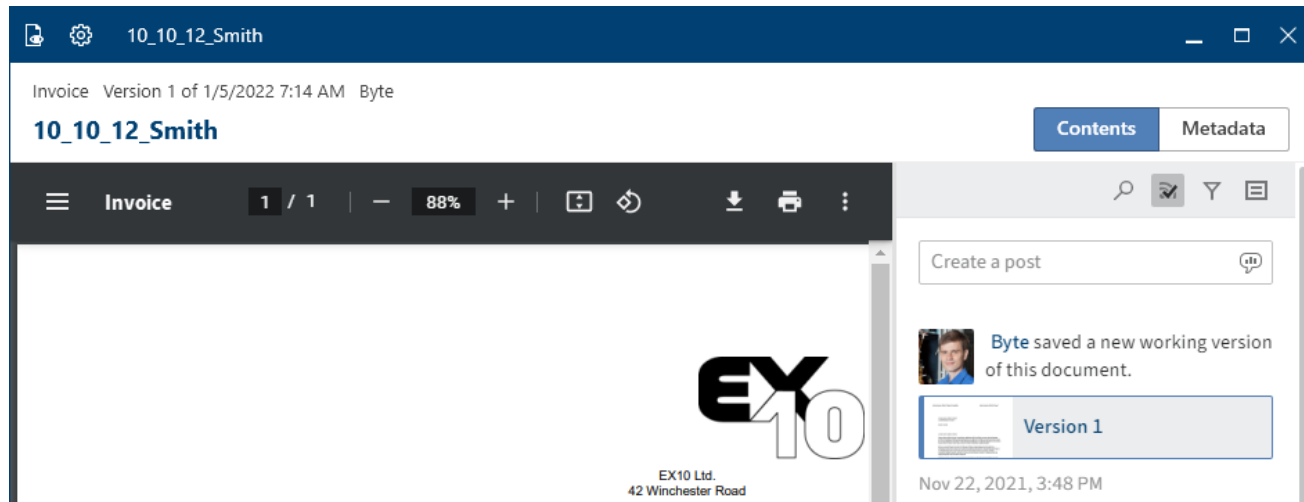
If you want to select multiple entries at once, you can only do this in the repository structure. You can find more information in the section *How do I select multiple entries?*.

You have the following options for working with folders:

- Create new folder: Create a new folder entry in your ELO repository.
- Insert folder: Insert a folder from the file system into the selected folder.
- Link folder: Link the filing of Outlook items with folders in ELO.
- Folder preview: See all child entries of the folder in a table view.

## Document

If you've selected a document, you can view the contents in a separate window using the *Preview* (keyboard shortcut: spacebar) function.



You have the following options for viewing the contents of a document:

- Open in read-only mode: Open the document in an external program.
- Preview: Open the document in a separate window. Additional functions are available there.
- Save as: Save the selected document on your file system and open it in an external program.

## Viewer pane

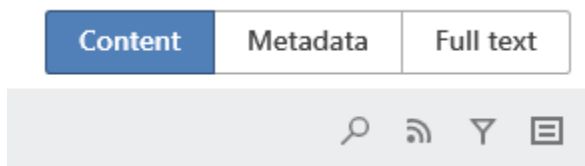
You can reach the viewer pane via the *preview* function (keyboard shortcut: spacebar). The selected document is shown there.

The screenshot displays the ELO Desktop Client interface. At the top, a blue header bar contains the text "Invoice Contelo" and standard window controls. Below the header, a status bar shows "Basic entry Version 1 of 11/22/2021 2:49 PM Byte". The main workspace is divided into three sections:

- Section 1 (Left):** A document viewer showing an invoice from EX10 Ltd. The document includes contact information, an invoice table, and a closing message from Annie Kowalski. A red callout "1" points to the document title "Invoice Contelo" in the top left.
- Section 2 (Right):** A social feed area with a "Create a post" input field and a list of posts from users "Byte" and "Anderson". A red callout "2" points to the "Contents" and "Metadata" tabs at the top right of this section.
- Section 3 (Bottom):** A toolbar with tabs for "Content", "Metadata", and "Full text". Below the tabs are icons for search, RSS, filter, and list view.

Each entry is made up of three elements: contents (1), feed (2), and metadata.

The contents and metadata are shown on the left, while the feed is always located on the right.



You can switch between the contents, metadata, and full text using the tabs.

- **Metadata:** Depending on the configuration, some parts of the form may initially appear collapsed with gen. 2 metadata. To expand a part of the form, click the arrow to the left of the header.
- **Full text:** The selected document appears in the full text. The document must have been added to the full text database. This display method lends itself to searches. A search field allowing you to search the text appears below it. For more information about the search field on the *Full text* tab, refer to the Preview section.

## Preview

You can display the preview for an entry in a separate window. Select the desired entry in the tree view. The *Preview* function is available on the toolbar in the *View* group.

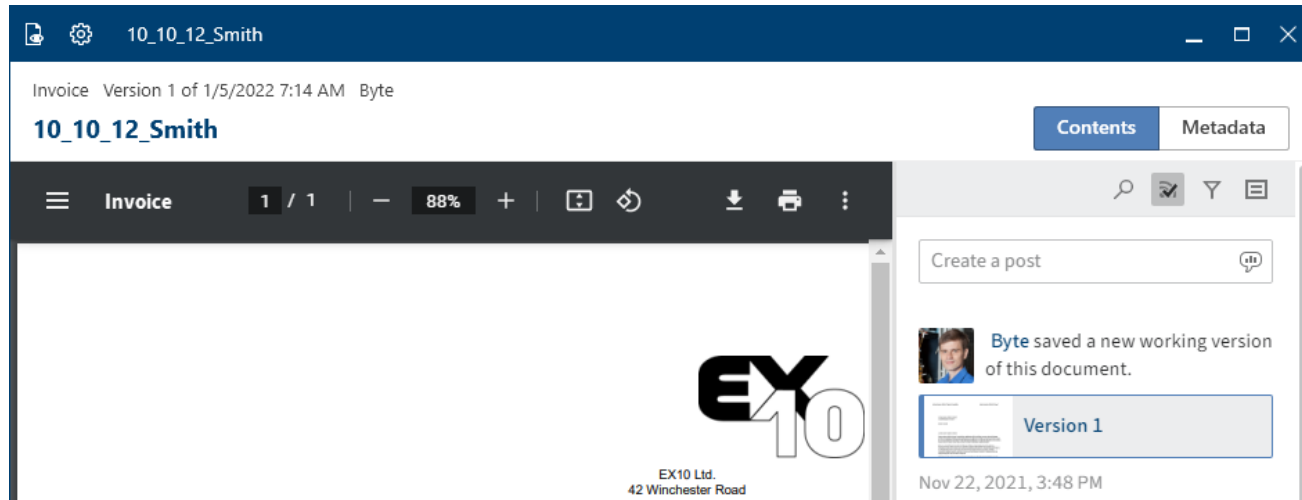
Keyboard shortcut: SPACE

Different functions are available in the preview depending on the file type.

In the preview configuration, set the maximum document size for the preview and what preview methods should be used for which file types.

### Preview for a Microsoft Office document

In the following example, the *Preview* function is used to open a Microsoft Office document in a new window next to the sidebar.



The Microsoft Office document opens with the *Windows Explorer preview* method in the *Content* view, as configured.

Two options are available in the preview header:

- Open in read-only mode: Selecting the eye icon opens the document in the associated Microsoft Office program.
- Preview configuration: Selecting the gear icon opens the *Configuration* dialog box. In the *Display* area, you can set the preview configuration for various file types.

### Information



If a link exists for an entry, this is indicated in the preview header.

Posts related to an entry are shown on the *Feed* tab. In the feed, you can comment on posts, mention colleagues, link posts, and categorize topics using hashtags.

### Information

The Feed chapter explains what options are available on this tab.

Selecting the *Metadata* button switches to the preview.



10\_10\_12\_Smith

Invoice Version 1 of 1/5/2022 7:14 AM Byte

## 10\_10\_12\_Smith

Basis   Extra text   Options



Short name	10_10_12_Smith		
Date	11/22/2021 3:48 PM	Current version	1
Filing date	11/10/2021 10:20 AM	User	Byte
Invoice number	4567589,56		
Invoice amount	623.54		
Customer number	000000093		
Invoice date	12/10/2021 12:00 AM		
Comment			
Company name	Smith		
Status			

The metadata is shown in the *Metadata* view. Depending on the width of the preview, you can either expand and collapse the *Basic*, *Extra text*, and *Options* areas or open them as a tab.

If full text information is available for the entry, you can open it by selecting the *Full text* button.

Invoice Version 2 of 3/5/2018 12:25 PM Farrell

## Blitz Computers



Search

↓ Down   ↑ Up






ELO Digital Office GmbH



Select the **Save** button to save the full text content as an HTML file.






### Folder preview

In the tree view, select a folder and then select *Preview*.

Invoices						
Folder						
Invoices						
Filter				Browse		
Type		Short name	Date	Filed by	Metadata form	Filing date
		EX10_2020_Invoice_Smith(1)	2/11/2019 2:09 /	Administrator	Invoice	2/11/2019 2:09 AM
		EX10_2018-12-13_Invoice_Gruber	2/11/2019 2:09 /	Administrator	Invoice	2/11/2019 2:10 AM
		EX10_2018-12-14_Invoice_WeKraTe	2/11/2019 2:03 /	Administrator	Invoice	2/11/2019 2:08 AM
		EX10_2017-03-16-Invoice_Waldschn	7/31/2017 4:20 /	Anderson	Invoice	2/20/2018 6:30 AM
		EX10_20170201_Invoice_Heinzelma	7/31/2017 4:19 /	Anderson	Invoice	2/20/2018 6:30 AM

The folder preview appears. You will see all child entries of the folder in a table view.

By selecting *Filter*, you can sort, group, and filter to narrow down the list. The search field next to the magnifying glass icon also allows you to narrow down the results with its *search-as-you-type* function.

Invoices						
Filter						
Type		Short name				
		EX10_2020_Invoice_Smith(1)				
		EX10_2018-12-13_Invoice_Gruber				
		EX10_2018-12-14_Invoice_WeKraTe				
		EX10_2017-03-16-Invoice_Waldschn				
		EX10_20170201_Invoice_Heinzelma				

Right-click the header of the table view to open the context menu.

## Show entries

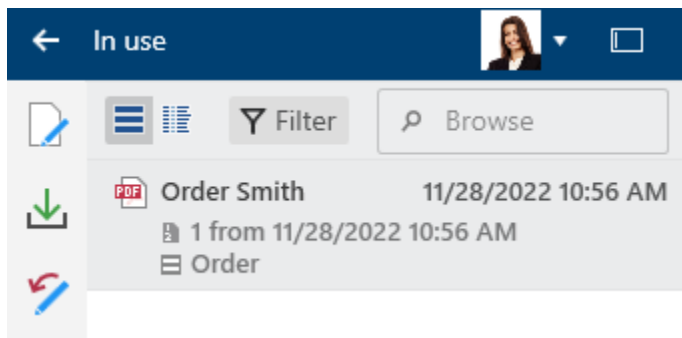
In the *In use* and *Search* work areas, you have two options for displaying entries:

- List view
- Table view


The following explains the list and table views based on the *In use* work area. The views only differ from the *Search* work area very slightly.

### List view

In the list view of the *In Use* work area, you will see all of the documents that are currently in use.

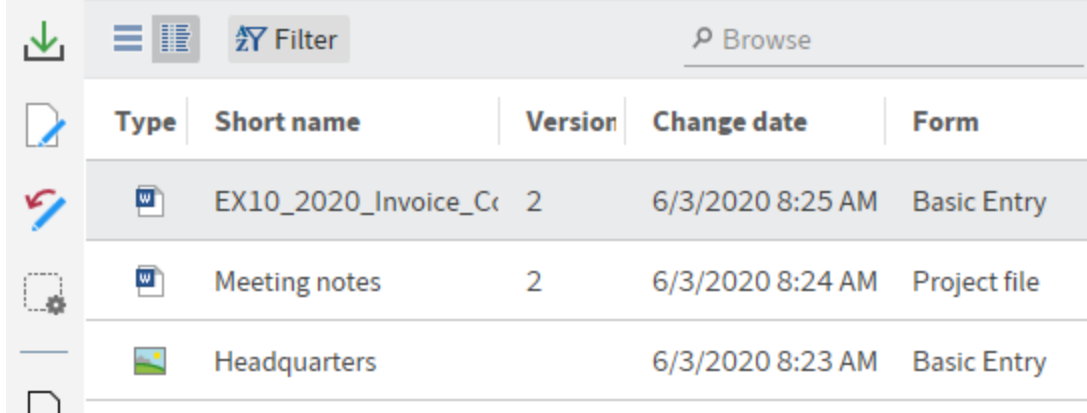





The following table explains the components of an entry.

File type		This icon indicates the file type.
Short name	Order Smith	The short name is shown here.
Date	2/8/2022 3:41 PM	Here, you will see when the document was checked out.
Version	1 from 10/11/2022 9:06 AM	Here, you find the version number of the document and when it was filed.
Form	Order	Here, you see the metadata form used to file the document.

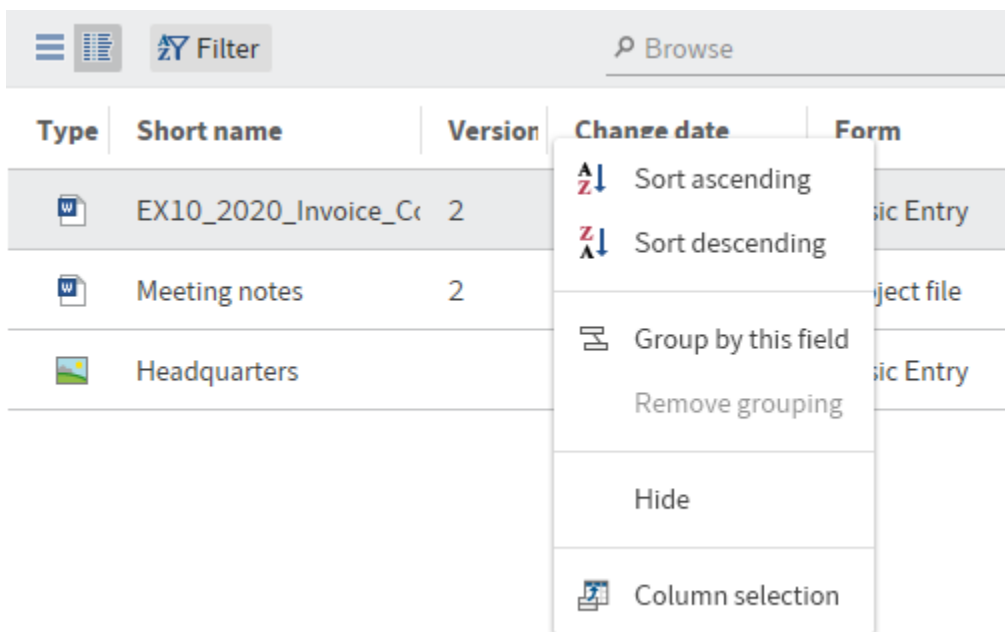
### Table view




You can also view documents in use in table format.



Type	Short name	Version	Change date	Form
	EX10_2020_Invoice_Cc	2	6/3/2020 8:25 AM	Basic Entry
	Meeting notes	2	6/3/2020 8:24 AM	Project file
	Headquarters		6/3/2020 8:23 AM	Basic Entry

Right-click the header of the table view to open the context menu. The following options are available:



Type	Short name	Version	Change date	Form
	EX10_2020_Invoice_Cc	2		Basic Entry
	Meeting notes	2		Project file
	Headquarters			Basic Entry

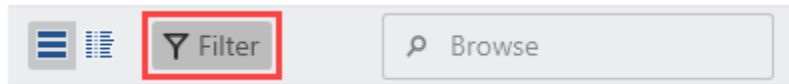
- Sort ascending
- Sort descending
- Group by this field: If you select the *Type* field here, for example, the individual file types are sorted in groups.
- Remove grouping
- Hide
- Column selection: You can add or hide fields in the table view.

**Information**

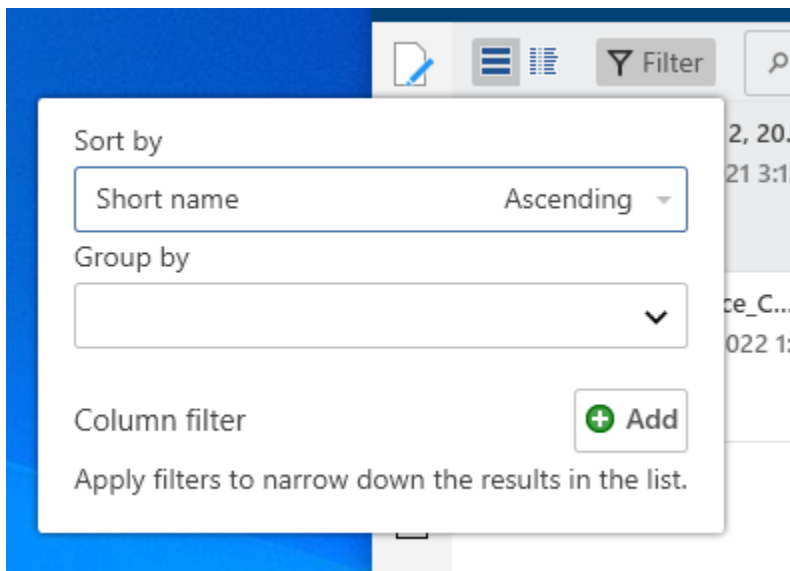
The *Short name* field is mandatory and cannot be hidden.

**Filter entries**

In each of the views there are buttons that allow you to switch views, use filters, and search the entries.



The *Filter* button allows you to sort the entries in ascending or descending order based on the metadata. You can also group the entries.



Select the respective name of the table column from the drop-down menus.

**Metadata**

Before you can file documents to ELO or create new folders, you must enter metadata for the entries. This is done by using metadata forms, which contain corresponding input fields (called *fields*).

The *Metadata* dialog box is used to enter and edit the metadata. The dialog box usually appears automatically when you file a document or create a folder.

For more information on *metadata*, refer to the Metadata section in the '*Organize*' group chapter.

## Feed



Byte

Please review details!

19 minutes ago



Anderson

Done - details verified.

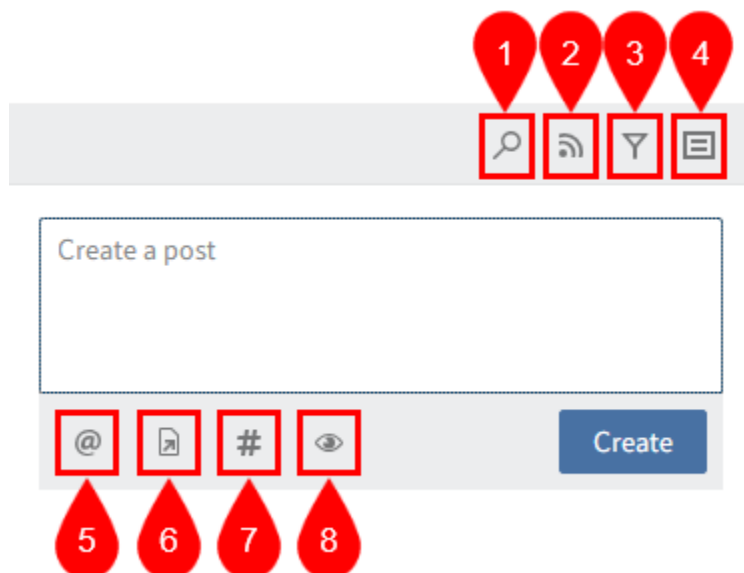
2 minutes ago

[Comment](#)

The feed is used to share information on an entry in ELO (document or folder) and track changes. New feed posts are denoted with a green dot.

The following message types are shown in the feed:

- Posts (written by a user)
- Comments (on a post)
- Polls
- Events (e.g. when a new version of a document is filed or changes are made to the working version)



1 Search feed

2 Subscribe to feed: When you subscribe to a feed for an entry, any new posts in the feed are also shown in *My ELO*. Users automatically subscribe to a feed when they file a document, or create a

folder, new document version, feed post, or comment. You can change the settings for subscriptions in the configuration or via the settings in *My ELO*.

3 Show filter options: Filters work in the same way as *My ELO > News*.

4 Show metadata for the entry: The metadata form associated with the entry is always displayed. The fields of the form are only displayed if they contain data. In gen. 2 metadata forms, only the form associated with the entry is displayed, even if you have completed other fields.

5 Mention users or groups: Alternatively, enter @ in the feed post to insert a mention. The users mentioned can see the corresponding feed post in *My ELO*.

6 Reference entry: Alternatively, enter > in the feed post to insert a reference. Users can automatically jump to the filing location of the linked entry via a reference.

7 Hashtag: Alternatively, enter # in the feed post to insert a hashtag. To be notified of new posts related to a specific topic, you can subscribe to hashtags. Select a hashtag and then select *Subscribe* (antenna icon).

8 Visibility: You can use this to restrict who can read your post. With *Remember selected visibility*, you can save the visibility settings as the default for future feed posts. The visibility settings of the post you are commenting on apply for comments. They cannot be changed.

### Create post/comment

The feed enables you to write posts related to entries in ELO and comment on posts uploaded by other users. Select *Create* or CTRL+ENTER to upload the post.

You can bold text in posts, polls, and comments. Place an asterisk (\*) at the beginning and end of the text section.

#### Information

If you want the asterisk to appear as a character in the text, enter a backslash before the asterisk.

#### Please note

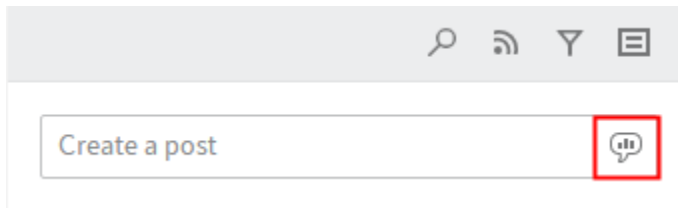
Do not enter any words that can act as search operators (NOT, OR, AND) in feed posts or hashtags. Otherwise, you may encounter issues when searching for these words.

### Edit post

Select *Edit* (pencil icon) to edit your own feed posts and comments.

Edited entries are marked as *edited* below the entry. Select *edited* to open the editing history.

## Create poll



Selecting the *Create poll* button opens a new area in the ELO feed. In this area, you can start a user poll.

You can select a duration for the poll from the drop-down menu and also enter a specific number of days. For example, enter 14 for two weeks.

The *Show more settings* drop-down menu opens an area with additional settings.

- Allow multiple choice
- Show user names of participants in results: The names are visible to all users participating in the poll. If this option is disabled, the poll is anonymous for you as well.
- Allow participants to add answers

Select *Create* to start the poll.

Once a user has taken a poll, it can no longer be modified.

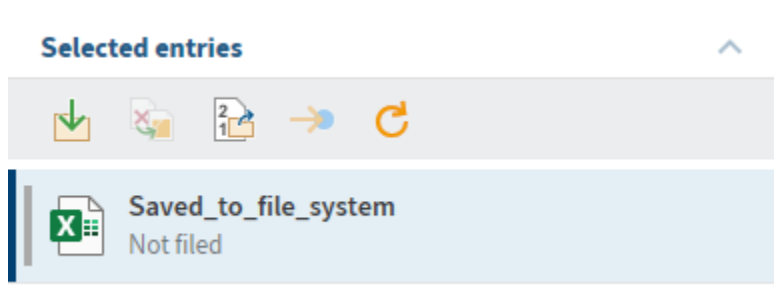
Select the X icon to delete a poll that has already started. You cannot undo this.

## Status: Different statuses

Available in: *Desktop* work area

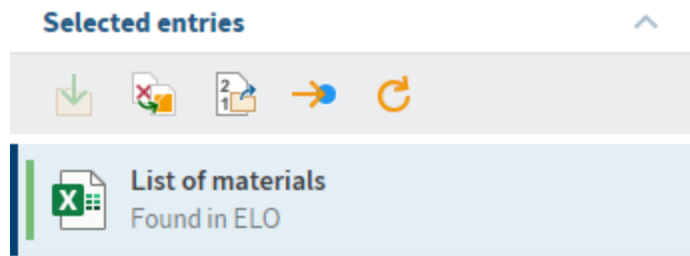
ELO recognizes the status of open Microsoft Office documents as well as files in the Windows Explorer and Windows Desktop. In the *Desktop* work area, the different statuses are indicated in the *Status* area.

### 'Not filed' status



The document is not filed to ELO. You can either save the file as a new document or as a new version of the document.

## 'Found in ELO' status

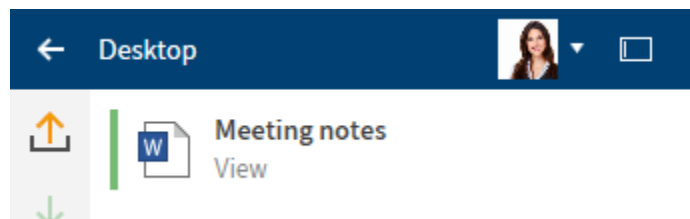


The document selected at the file system level is already filed to ELO. You can replace the selected file with an ELO link, file a new version of a document, or go to the location where the entry is filed in ELO.

### Please note

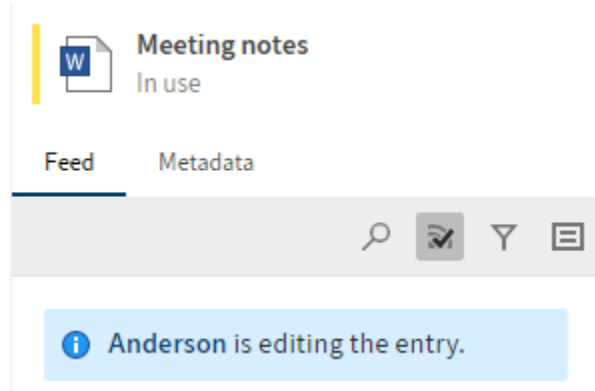
If you open the file from the Windows file system, ELO can no longer recognize the status due to a lock. In this case, you can either go to the location where the entry is filed in ELO or replace the file with an ELO link. We recommend checking the document out in ELO to edit it.

## 'View' status



A document filed in ELO is opened for viewing in an external program. You can check out and edit the document or file it as a new version. Once you have changed and saved the document in an external program, the status switches to *In use*.

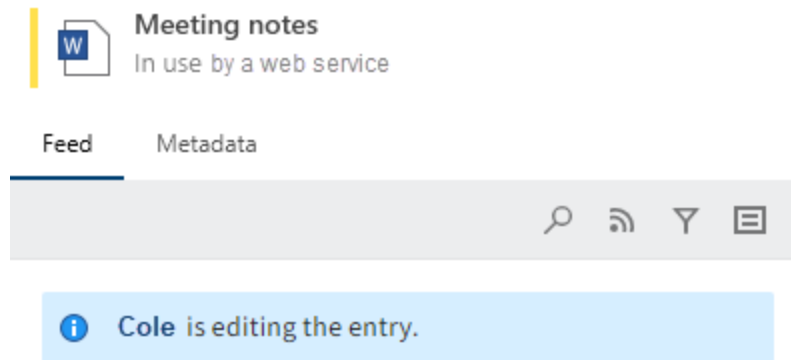
## 'In use' status



A document filed to ELO is currently being edited in a Microsoft Office program. You can check the document in, file it as a new version, or discard your changes.

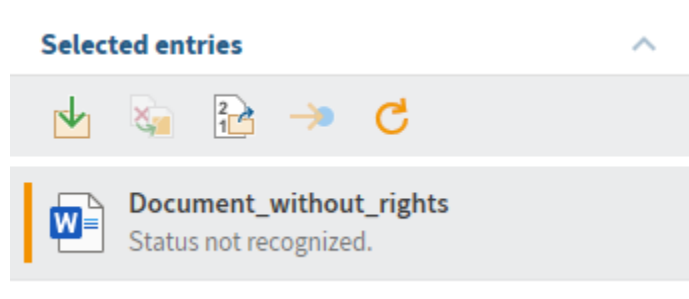


### 'In use by a web service' status



A document filed to ELO is currently being edited in a Microsoft Office program via a web service. This requires ELO to be connected as a drive.

### 'Status not recognized'



The Windows user does not have read access to the document or an application is blocking read access.

## Save as

With the *Save as* function, you can save the selected document to your file system. A window for selecting the location in the file system opens.

Keyboard shortcut: CTRL + S

## Open in read-only mode

The *Open in read-only mode* function opens a selected document in an external program in read-only mode.

Keyboard shortcut: CTRL + O