



ELO Desktop Client

ELO Desktop Client Plus



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ELO Desktop Client Plus

This chapter is aimed at ELO Desktop Client Plus users. ELO Desktop Client Plus users require an appropriate license.

This enhanced version contains all functions of the ELO Desktop Client. In addition to the default and lean views, a full-screen mode is also available.

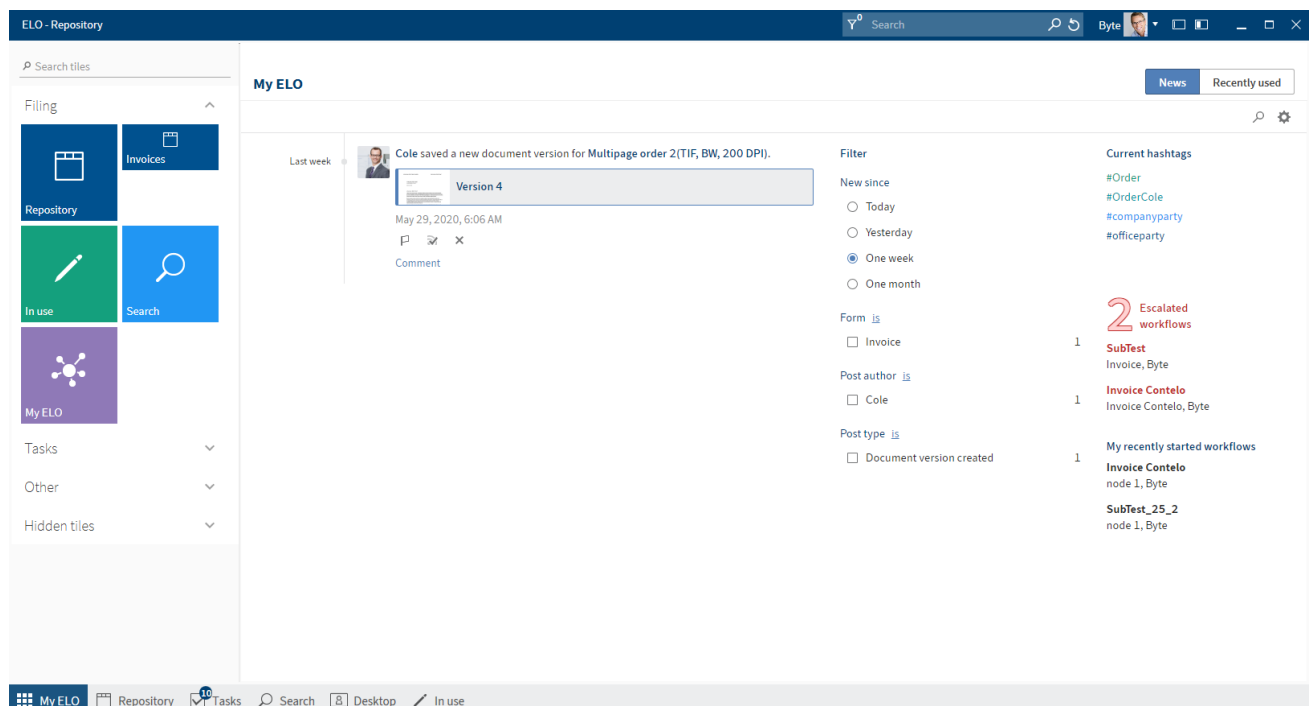
ELO Desktop Client Plus also includes the *Tasks* work area. The *Tasks* work area contains an overview of your workflows and reminders. The functions of the *Tasks* group on the toolbar are used for editing workflows and reminders. You can edit and manage existing workflows in this area.

Full screen



You can open full-screen mode by selecting the button at the right of the header.

Full-screen mode also provides a preview area for folders and documents integrated into ELO. Otherwise, the work areas in the ELO Desktop Client Plus do not differ from those in the standard client.



The home screen connects the tile navigation with the *My ELO* work area.

List of tasks

In this list, you will find tasks that are assigned to you or a group you belong to. In addition to workflows, reminders and monitoring tasks are shown here. The icons on the right indicate the priority, type of document, and whether the workflow has been escalated.

The following types of tasks are available; you can distinguish them by their icon:

Workflows

Workflow icon



Reminders

Calendar icon




Monitoring entries Camera icon




The tasks are sorted according to their priority: A (high), B (medium), and C (low). Overdue tasks are denoted with a red icon with a white exclamation mark. New entries are shown with a green dot.

Under *Configuration > Display > Task list display options > Maximum number of days in the future* you specify how many days in advance tasks should be shown in the task list.

If you need more information on the individual entries, switch to the table view (table icon).

 Sort ascending

 Sort descending

 Group by this field

Remove grouping

Hide

 Column selection

For a better overview, you can sort the tasks according to your requirements. Right-click the table header to do so.

The screenshot shows the ELO Desktop Client interface. At the top, a header bar displays 'Invoice 8/22/2016 11:51 AM Administrator'. Below this, the 'Tasks' panel on the left lists several workflow steps, including 'Invoice', 'Invoice Contelo' (which is selected and highlighted), 'Approval', and 'node 1'. The main viewer pane on the right displays a document titled 'Invoice Contelo'. The document content is as follows:

ELO Digital Office GmbH •
 Contelo GmbH
 Elm St. 654

Anytown, 12345

Select an entry to view its contents in the viewer pane.

If the workflows contain forms, open them by selecting the *Form* button. There, you can process and forward the workflow.

Tasks disappear from the tasks area in the following ways:

- **Workflows: Actively:** You forward the workflow using the form (*Form* tab) or the function (*Task group > Forward workflow*), delegate it, or hand it off. **Passively:** A group workflow is accepted by another member of the group.
- **Reminders and monitoring:** You delete the entry (*Organize > Delete*).

Complete tasks with workflows

Start workflow

Using workflows, you can assign individual users or groups tasks.

An integrated escalation management function allows you to track whether the set deadlines are met once a workflow is started.

The *Start workflow* function gives you access to workflows with different levels of complexity designed for specific processes within your company.

Method

1. Select the document you want to start a workflow on.

Information

You can also start workflows on folders.

2. On the toolbar, select *New > Start workflow*.

Start workflow

List of materials

Select a template and modify the workflow name if required. Click OK to start the workflow.

Templates

Browse

Approval workflow

Incoming Invoice

Invoice

Leave Request

Newsletter

Order

Workflow name

Order

OK Cancel

The *Start workflow* dialog box appears.

Templates: Select a workflow template here. You can search for the right template in the search field.

Workflow name: The name of the template is automatically entered as the workflow name. You can change this name as needed.

3. Select an appropriate template and confirm with *OK*.

Result

The workflow starts.

Outlook

Once you have started a workflow, it will appear in *My ELO* under *My recently started workflows*.

If one of your workflows was escalated, you will see the *Escalated workflows* area.

1 Escalated workflow

Claims

First check, Cole

My recently started workflows

Incoming Invoice

First check, GRP_POST

Edit workflow

If you were selected as the editor in a workflow, the workflow appears in your *Tasks* work area.

You can receive workflows as a user, as a group member, or as a substitute.



You will recognize a workflow based on the workflow icon.

A new workflow is marked with a green dot and bolded font.

When you receive a workflow, you have the following options:

- *Edit workflow with a form*
- *Forward workflow* function
- *Accept workflow* function
- *Return workflow* function
- *Delegate workflow* function

Edit workflow with a form

For workflows with forms, you can open the form by selecting the *Form* button. This button is only available in full-screen mode.

Method

1. Edit the fields of the form as indicated in the task.
2. To forward the workflow after editing the form, select the corresponding button within the form.

Forward workflow function

When you receive a workflow task, it will appear in your *Tasks* work area.

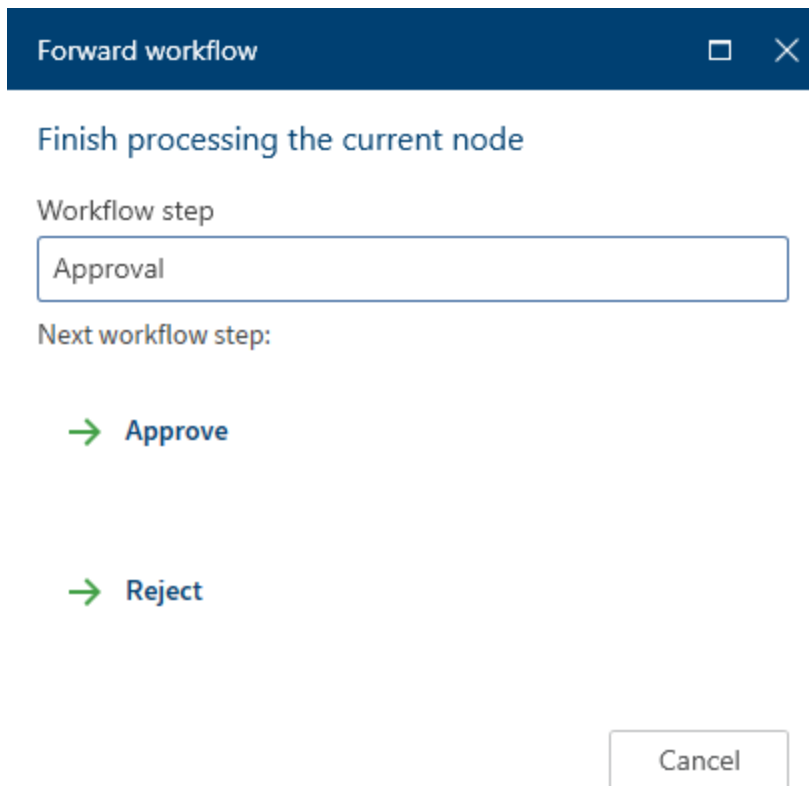
After you have completed your task, forward the workflow to the next editor.

Related functions

- Edit workflow with a form: If the workflow you receive contains a form, forward it using the form.
- Return workflow
- Delegate workflow

Method

1. Select the workflow that you want to forward.
2. On the toolbar, select *Task > Forward workflow*.



Forward workflow

Finish processing the current node

Workflow step

Approval

Next workflow step:

→ Approve

→ Reject

Cancel

If you have received a workflow and this button is disabled, this is for one of the following reasons:

- 1. You received the workflow as part of a group. In this case, you have to accept it first by selecting *Accept workflow*.

Information

If you are unable to accept a group task, you need the corresponding role. You can enable roles via *User menu [your name] > Enable roles*.

- 1. The workflow contains a form. The form opens in the viewer pane. In this case, forward the workflow by selecting the button on the form.

3.

Select the workflow step.

Result

The workflow is forwarded and disappears from your tasks area.

'Accept workflow' function

If you have received a workflow as part of a group, you have to accept it before you can process and forward it. This prevents the workflow from being processed by multiple users at once.

Method

1. Select the workflow that you want to accept.
2. On the toolbar, select *Task > Accept workflow*.

Keyboard shortcut: ENTER key

Once the workflow is accepted, it is removed from the *Tasks* work area of the other group members. Use the *Return workflow* function to undo accepting the workflow.

Information

If a group member selects or accepts a group task, the task is marked as read for all group members.

If a group task is returned, it remains marked as read for all group members.

'Return workflow' function

You can return a workflow you received as a group member and accepted with the *Accept workflow* function.

Related function

- Delegate workflow

Method

1. Select the workflow you want to return.
2. On the toolbar, select *Task > Return workflow*.

The workflow now appears in the *Tasks* work area of all group members the workflow was sent to.

'Delegate workflow' function

You can delegate your workflow step.

Related function

-

Return workflow

Method

1. Select the workflow that you want to delegate.
2. On the toolbar, select *Task > Delegate workflow*.

Delegate workflow

Workflow step

Decision

Delegate to following user/group:

Select user/group

Byte

☐ Notify after processing the node

OK Cancel

You can select one user or group, or multiple users or groups.

Delegate to following user/group: From the drop-down menu, select which user or group you want to delegate the workflow to.

Notify after processing the node: If this box is checked, the workflow is assigned back to you after the selected user/group has processed the workflow node.

Refresh

With the *Refresh* button (keyboard shortcut: F5 key), changes recently made by other users are immediately applied.

This means that tasks can disappear from the task list in your *Tasks* work area if they have been accepted by other users in the meantime.

New tasks are denoted with a green dot.

Organize reminders

Reminder

You can use reminders to remind yourself of entries that you want to work on at a later time.

You can create reminders for folders and for documents. You can create a reminder for multiple entries within a folder at the same time.

Method

1. Select the entry you want to create a reminder for.

You can also create reminders for multiple entries at the same time. You can learn how to do this in the section [How do I select multiple entries?](#)

2. On the toolbar, select *New > Reminder*.

Reminder

×

EX 10 Meeting minutes

Name

EX 10 Meeting minutes

Due date

9/14/2021 9:42 AM

⋮


Priority

B


▼

Select user/group

▼

 Anderson

×

 GRP_POST

×

Info

OK

Cancel

3. Configure the settings for your reminder in the *Reminder* dialog box.

Information

If you selected multiple entries, only the dialog box for the topmost selected entry appears at first. As soon as you have edited the settings and selected *OK*, a new dialog box opens for the next selected entry.

Date: Select the date the task should be completed on. The date appears in the tasks overview as the *Task date*. Depending on your settings for how tasks are displayed, the reminder may also show up in the Tasks work area of the selected users a few days beforehand.

Priority: The priority level is shown in the tasks overview when a reminder is received.

Select users/groups

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

Result

The reminder appears in the *Tasks* work area of the selected users at the configured time. You will recognize it by the calendar icon.

Outlook

To remove the reminder from your Task view, select the notification, then, on the toolbar, select *Organize > Delete*.

Edit reminder

Reminders are shown in your *Tasks* work area. You will recognize them based on the calendar icon.

Information

The time at which the reminder appears in the Tasks work area depends on the setting under *User menu > Configuration > Display > Task list display options > Maximum number of days in the future*.

When you receive a reminder, you have the option to change it.

Reminder

?

×

Multipage order 2(TIF, BW, 200 DPI)

Name

Multipage order 2(TIF, BW, 200 DPI)

Deadline

6/2/2020 7:31 AM

Created on

5/20/2019 7:12 AM

Viewed on

6/2/2020 7:30 AM

From user

Farrell


Prio

B

▼

Select user/group

▼

 Farrell

×

Note

OK

Cancel

- Name: The name of the document is entered for you. You can enter another name, if required.
- Deadline: Date on which the document should appear as a task.
- Created on
- Viewed on
- From user: The creator of the reminder is displayed here.
- Priority: Choose from A, B, or C.
- Select user/group
- Note: Enter additional information here.