ELO Desktop Client

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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.

Getting started

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

- Important actions in detail: This chapter introduces you to some important features with detailed step-by-step instructions and explanations. With the help of these instructions, you will learn basic actions in ELO, which can be applied to most other functions.
- New view: If you initially want to test a function that only affects your ELO, this function is a good choice.
- 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
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Personal settings

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-

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- Document from template

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- Metadata

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- Load new version
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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
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want to keep track of changes in ELO?

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- 'My ELO' button
- News

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- Add search favorite

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- Send as ELO link
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want to search for entries?

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

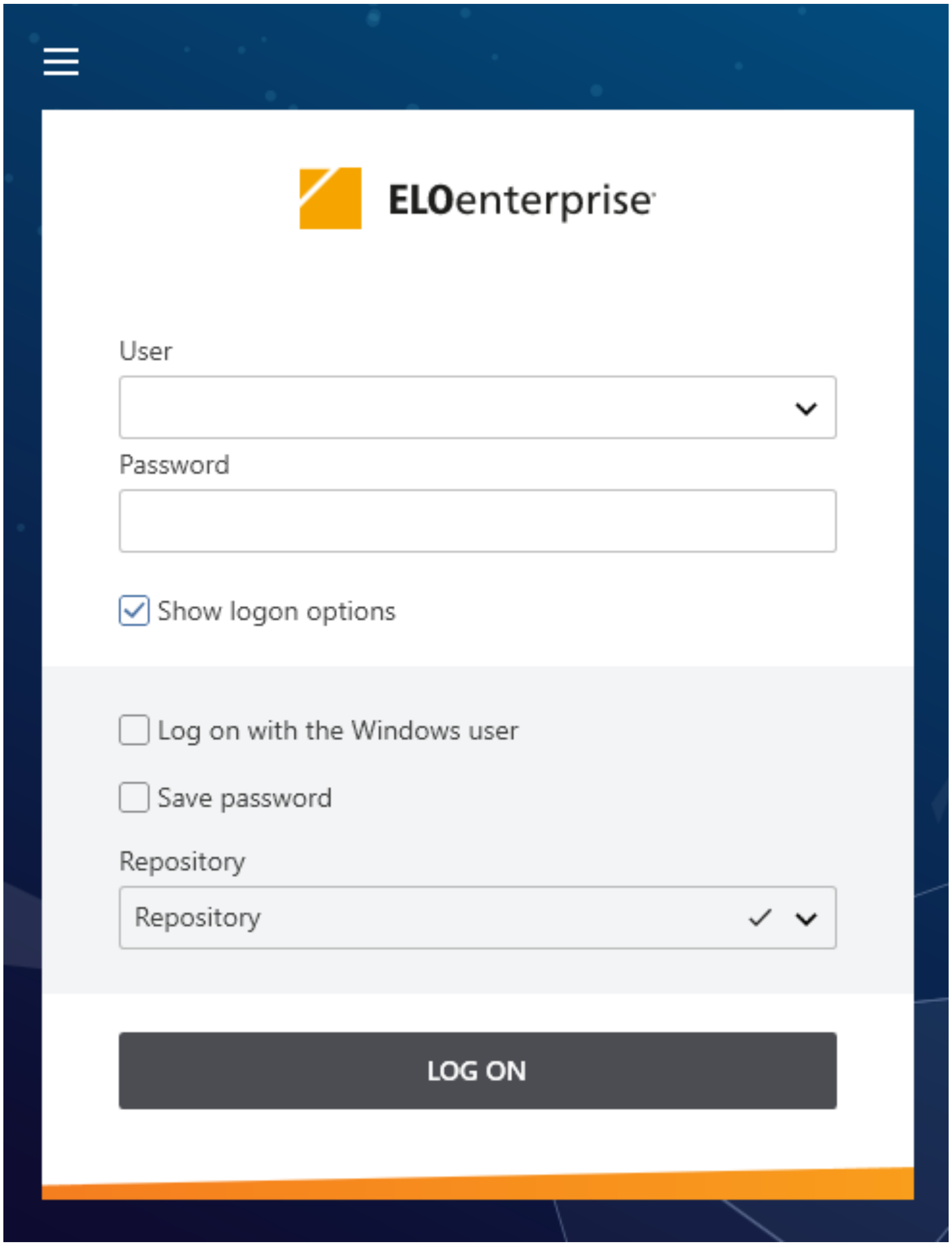
want to structure the repository area?

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

want to file e-mails?

- Manual filing
- Link folder
- Dynamic extension

Start ELO



Connect to ELO via the *Logon* 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

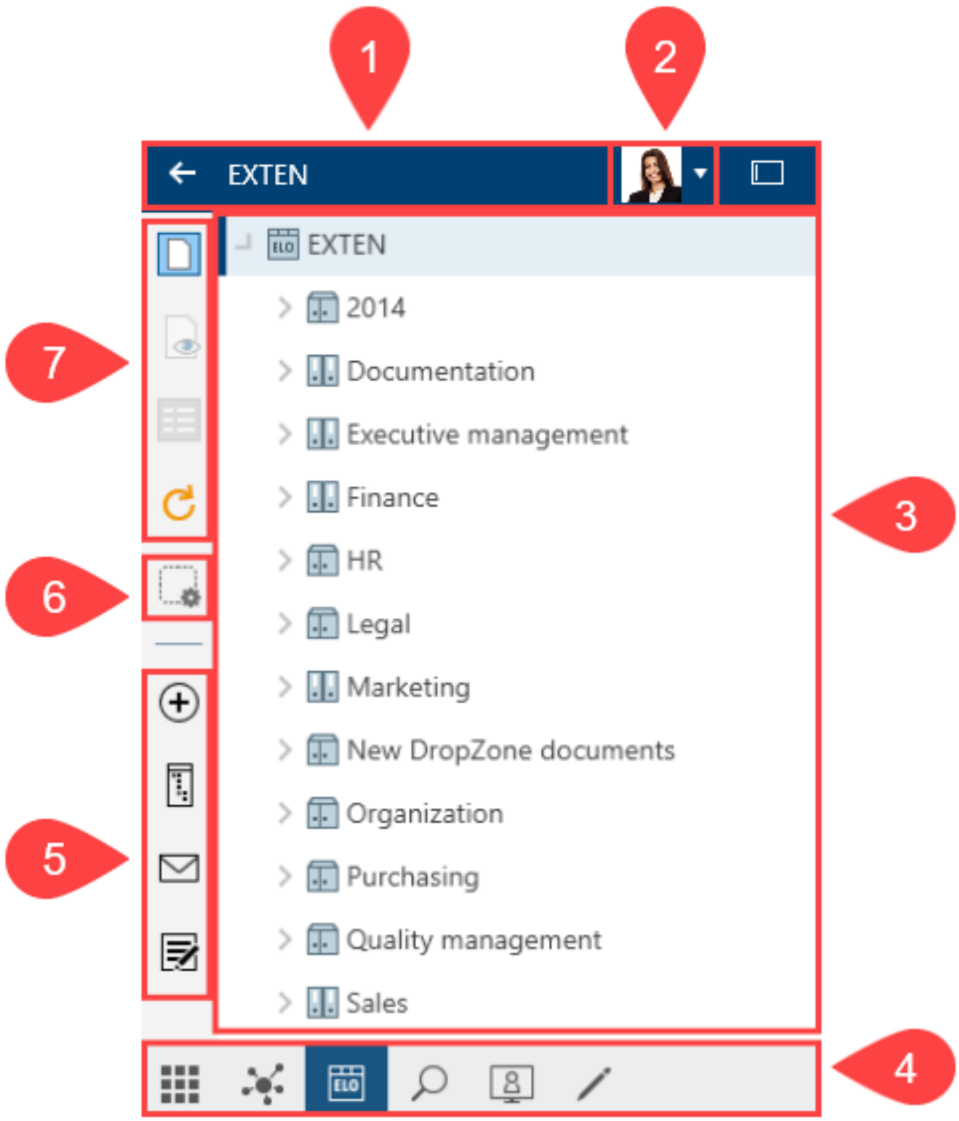
- Apply tile view: The administrator can transfer the tile view to another user or option groups via the configuration, so that all users or certain departments have the same tile arrangement. Only settings such as the color and the icon are taken on here. No tiles are deleted or created.
- New logon 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.

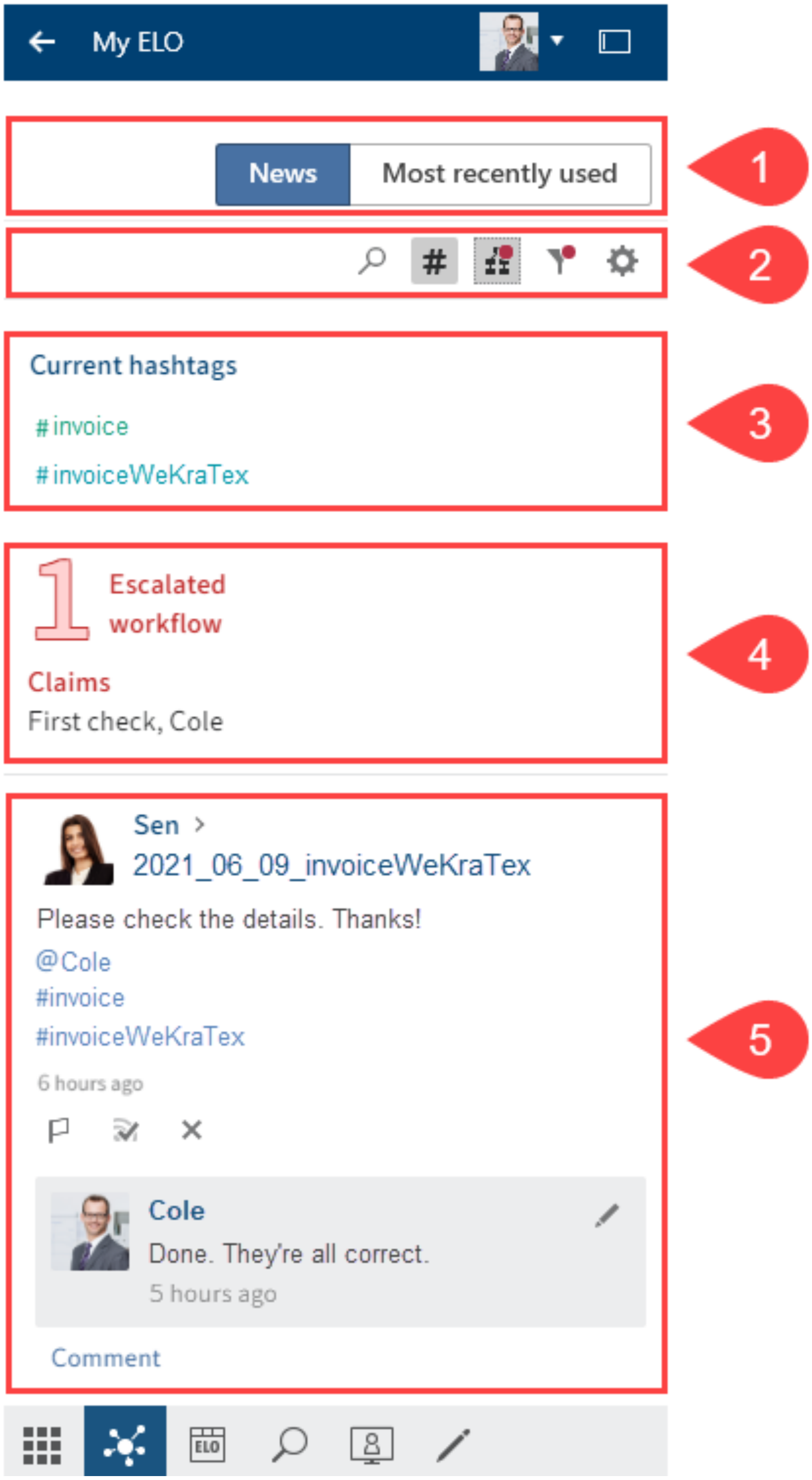
ELO contains the following work areas:

- 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, they are listed 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: This area shows documents that are in use. Entries in the *In use* work area are locked for all other users.

'My ELO' work area

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

You can open the *My ELO* work area from the navigation bar or with the keyboard shortcut CTRL + 7.



1 News/Most recently used: Select these buttons to switch between the *News* and *Most recently used* views. The *News* area helps you keep track of changes in ELO. You will find your most recently used entries under *Most recently used*.

2 News toolbar: The preview area for the contents in *My ELO* is limited. On the toolbar, you will find additional functions that allow you to show more news, such as hashtags, substitutions, workflows, or filters.

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: The feed contains posts related to different entries. This can include feeds you have subscribed to or in which you have been mentioned. New feed posts are denoted with a green dot.

> **Information**
>
> The main functions in the *My ELO* work area are feed functions. They are described in the chapter *Important components* in the section Feed.

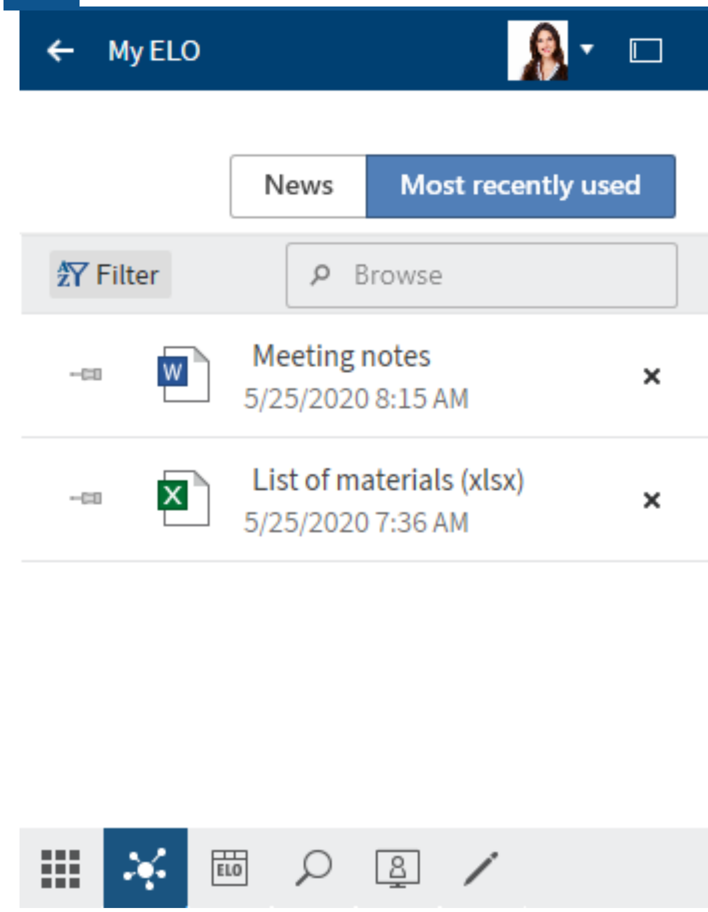
News

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.

Most recently used

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



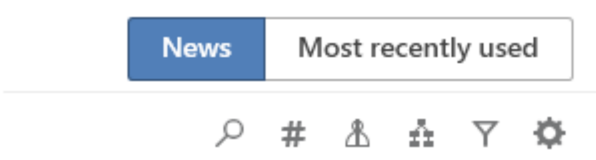
Select *Pin entry* (pin icon) to permanently pin entries to the top of the list.

To remove an entry from the list, select *Delete* (the X icon).

Information

You can set the maximum number of entries shown in *Most recently used* in the configuration (*User menu > Configuration > Display > List of recently used entries*).

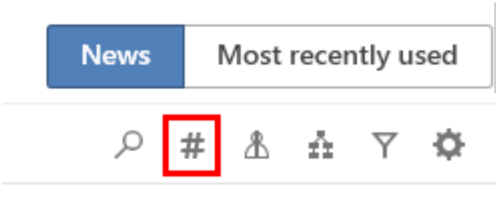
News toolbar



The preview area for contents in *My ELO* is limited. On the toolbar, you will find the following functions that allow you to show more news:

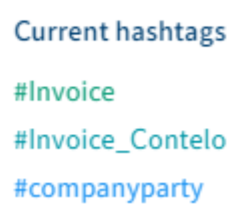
- Search feed (magnifying glass icon)
-

Show current hashtags (hashtag symbol)



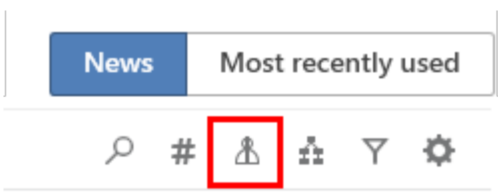
If you select the *Show current hashtags* button, hashtag information is displayed above the feed.

Hashtag cloud



Hashtags that have been used in recent weeks are shown in a hashtag cloud. If you select a hashtag, you will see all feed items that contain that hashtag, provided you have the required permissions.

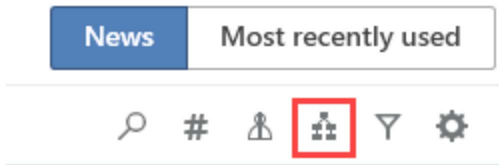
- Show substitutions (person icon)



Select *Show substitutions* (person icon) to see who you are substituting for and who is currently substituting for you (if a substitution is active).

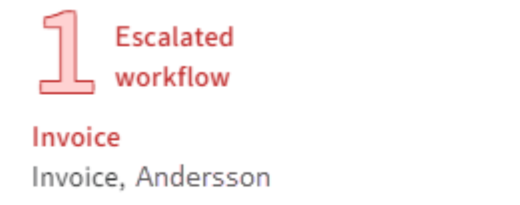
> **Information**
>
> You cannot create substitutions in the ELO Desktop Client. Use the ELO Java Client or ELO Web Client.

- Show workflows (workflow icon)



If you select *Show workflows*, the workflow information is shown above the feed. You will see all workflows you are involved in. Workflows with passed deadlines are highlighted in red.

Escalated workflows



In the *Escalated workflows* area, you can see which escalated workflows you are involved in.

Click the name of the workflow to jump to the respective workflow in the *Tasks* work area.

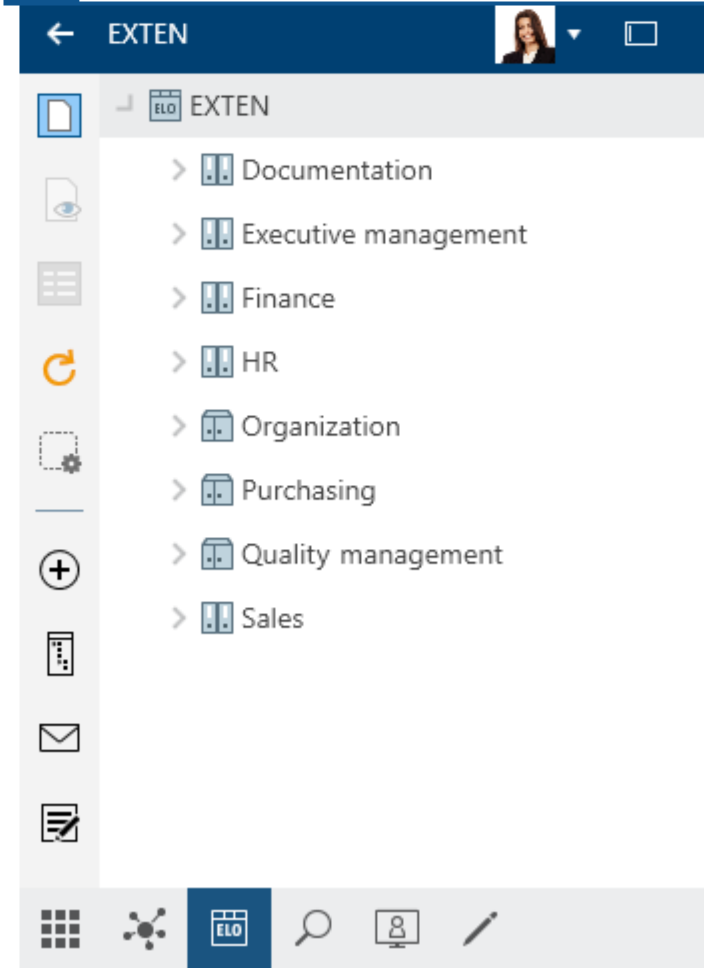
> **Information**
>
> You cannot start workflows in the ELO Desktop Client. Use the ELO Java Client, ELO Web Client, or ELO Desktop Client Plus.

- Show filter options (filter icon)
- Settings (gearwheel icon)

'Repository' work area

In the *Repository* work area, you can file and manage your documents and data.

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



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

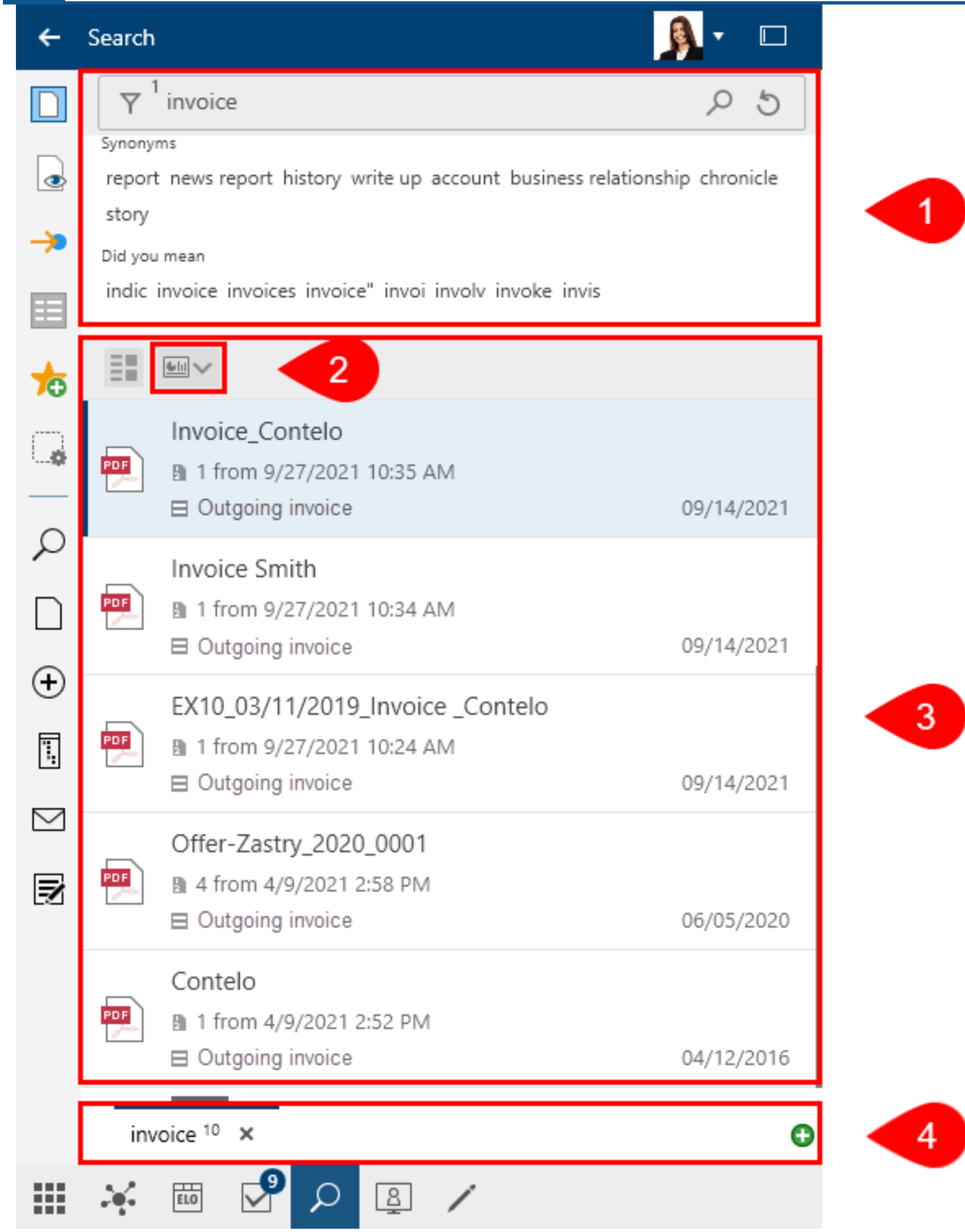
For a detailed description of the *viewer pane*, refer to the Important components chapter.

'Search' work area

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 the keyboard shortcut CTRL + 6.



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).

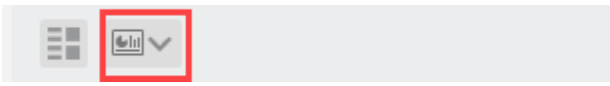
2 Dashboards: A button is available in the search results that allows you to launch dashboards after conducting a search with a metadata form filter. This button is only displayed if dashboards have been configured for the corresponding metadata form. Dashboards can only be created with generation 2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

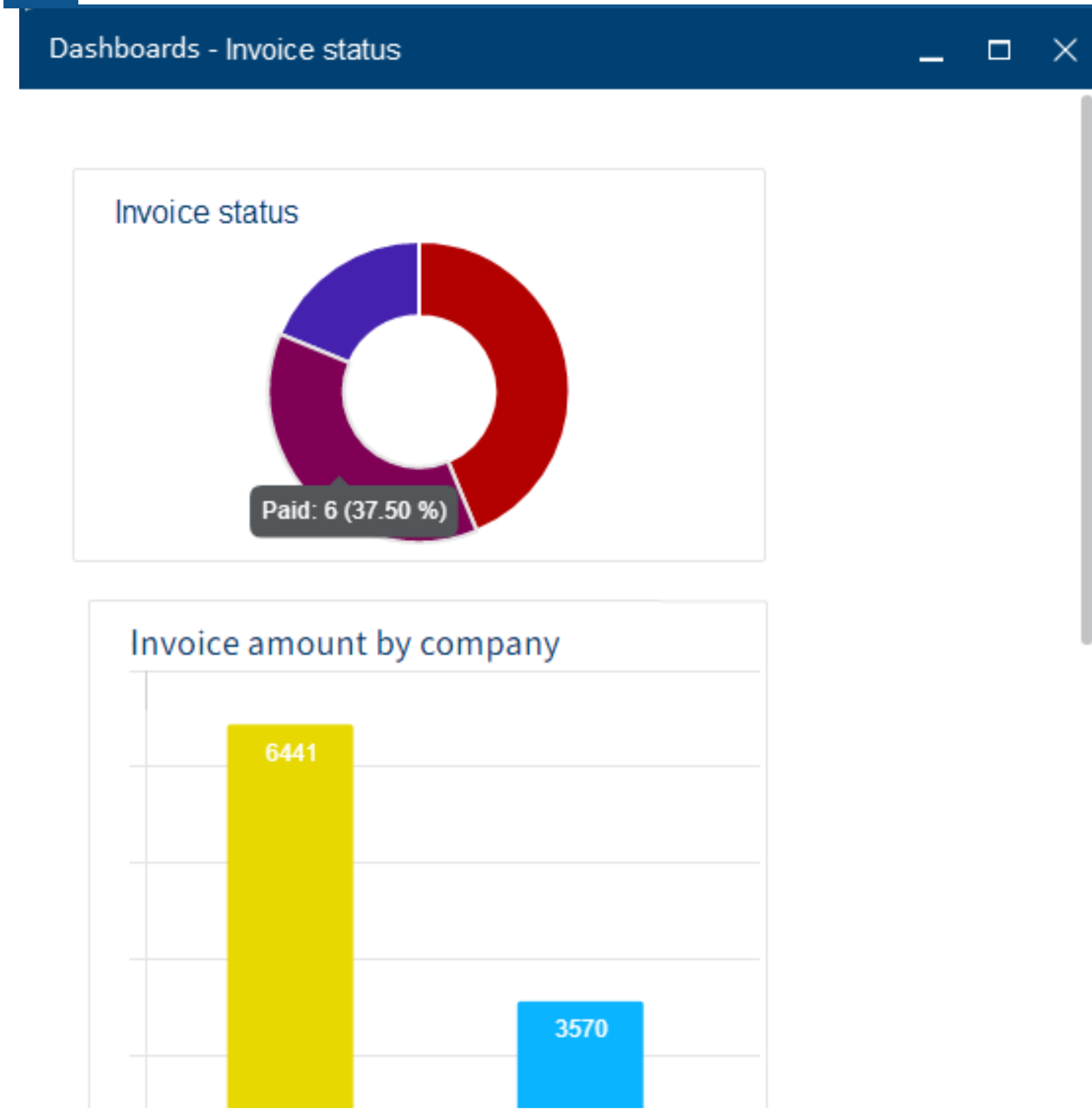
The Narrow down a search request and 'Search' group chapters explain each of the search elements and how to perform a search.

Dashboards



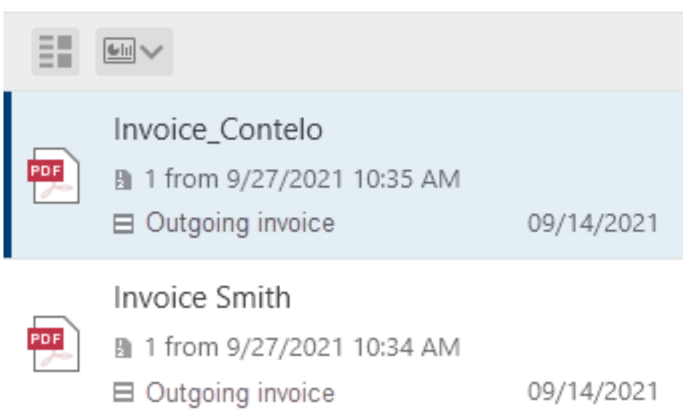
Dashboards are created by the administrator. They can only be created with generation 2 metadata.

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.

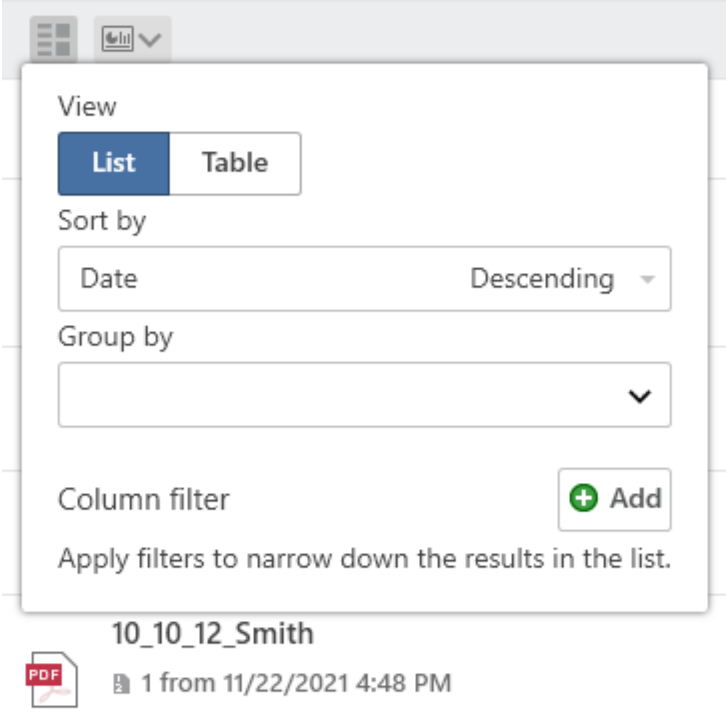


You can move the mouse over the dashboards to view details about them.

Results list



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

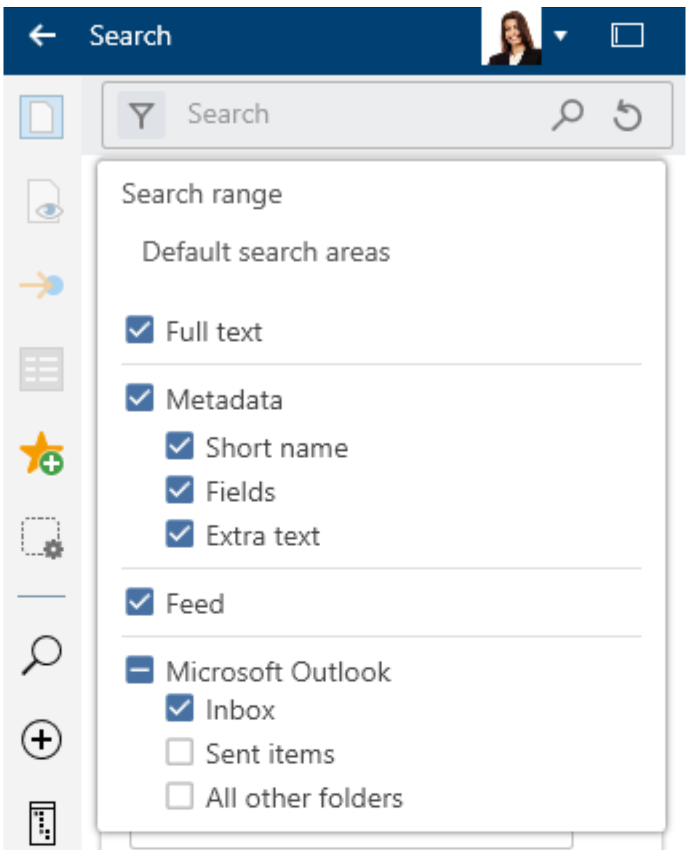
The *Search options* button provides the following options to narrow down your search:

- 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.

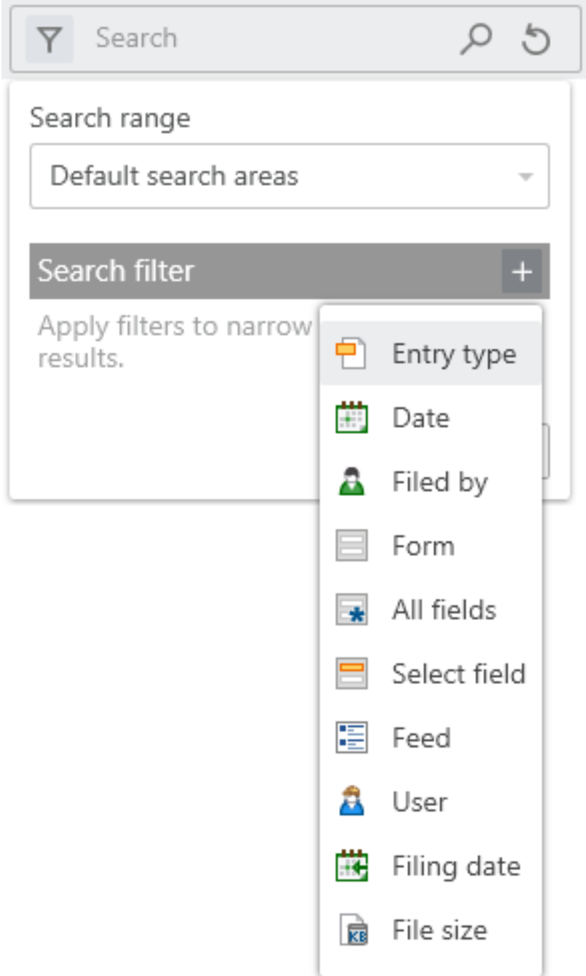


Use the *Search range* menu (filter icon) to make your settings.

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.

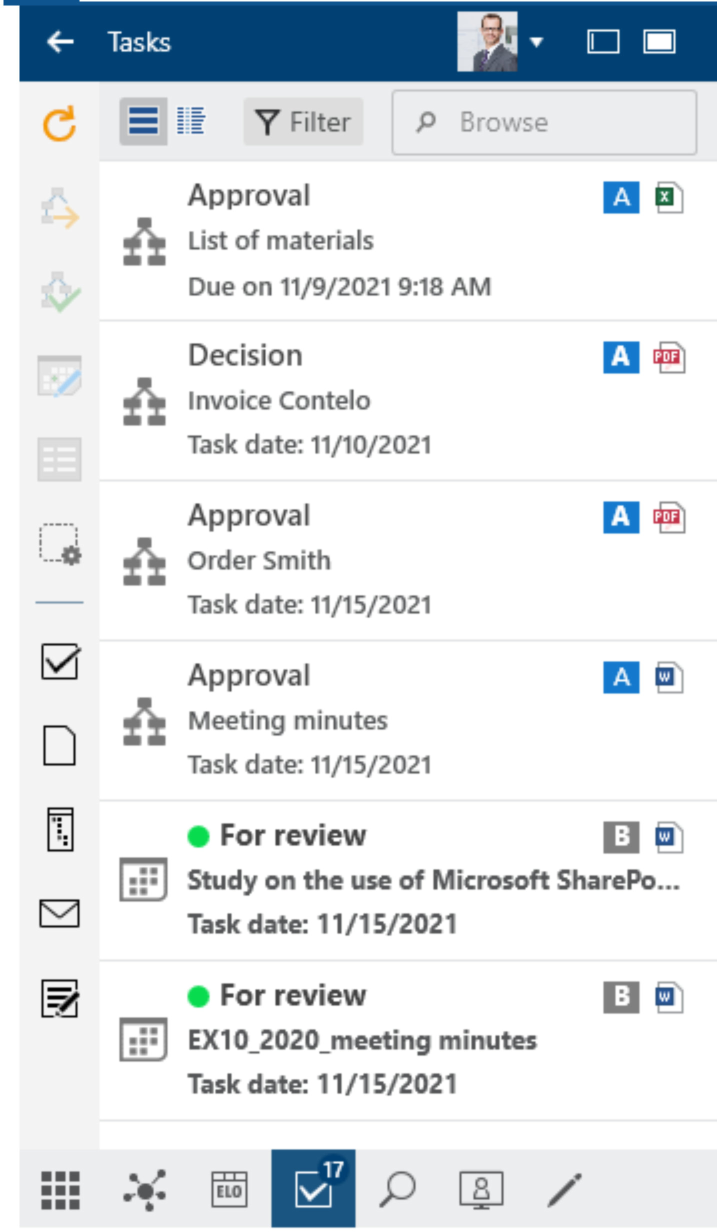
To negate a selected filter, right-click the filter and then click *does not contain*.

'Tasks' work area (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 the keyboard shortcut CTRL + 4.

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



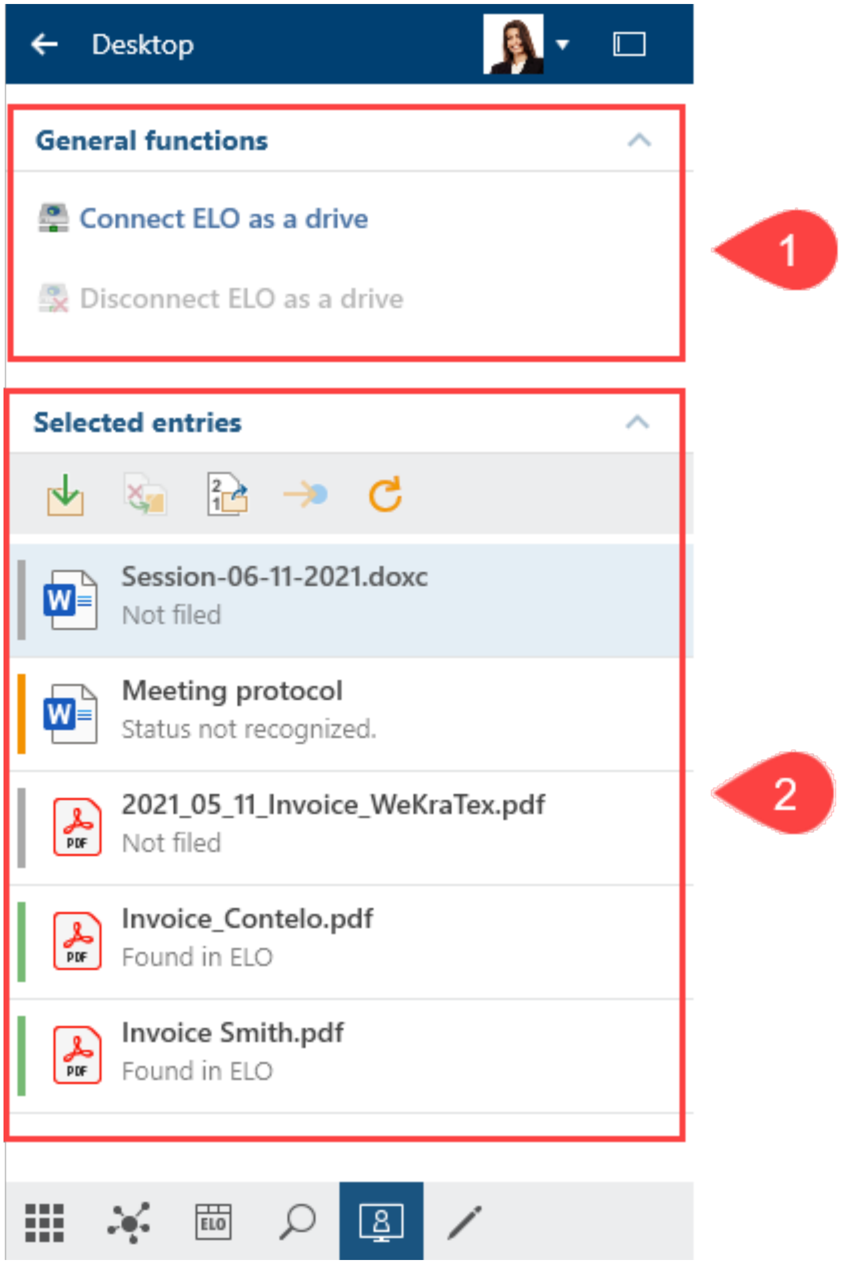
For more information about the *Tasks* work area, refer to the chapter ELO Desktop Client Plus.

'Desktop' work area

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 the keyboard shortcut CTRL + 8.

Not connected to ELO



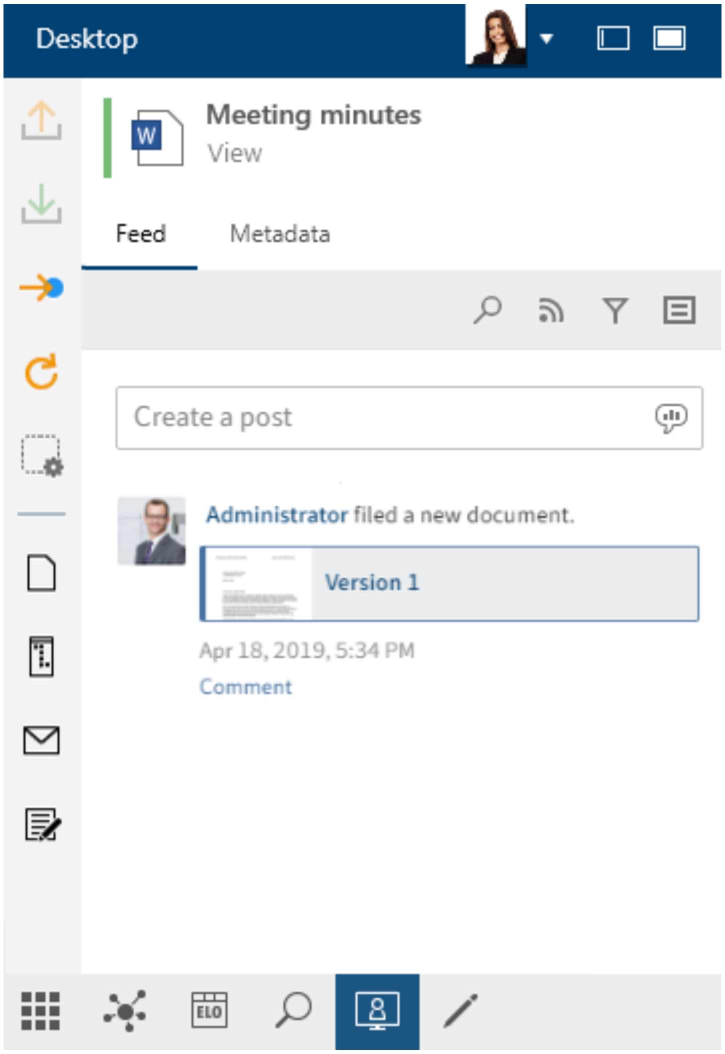
1 General functions: When the Windows Explorer is open, the general functions *Connect ELO as a drive* and *Disconnect ELO as a drive* are offered. To connect a WebDAV network address, select *Connect ELO as a drive*.

- 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

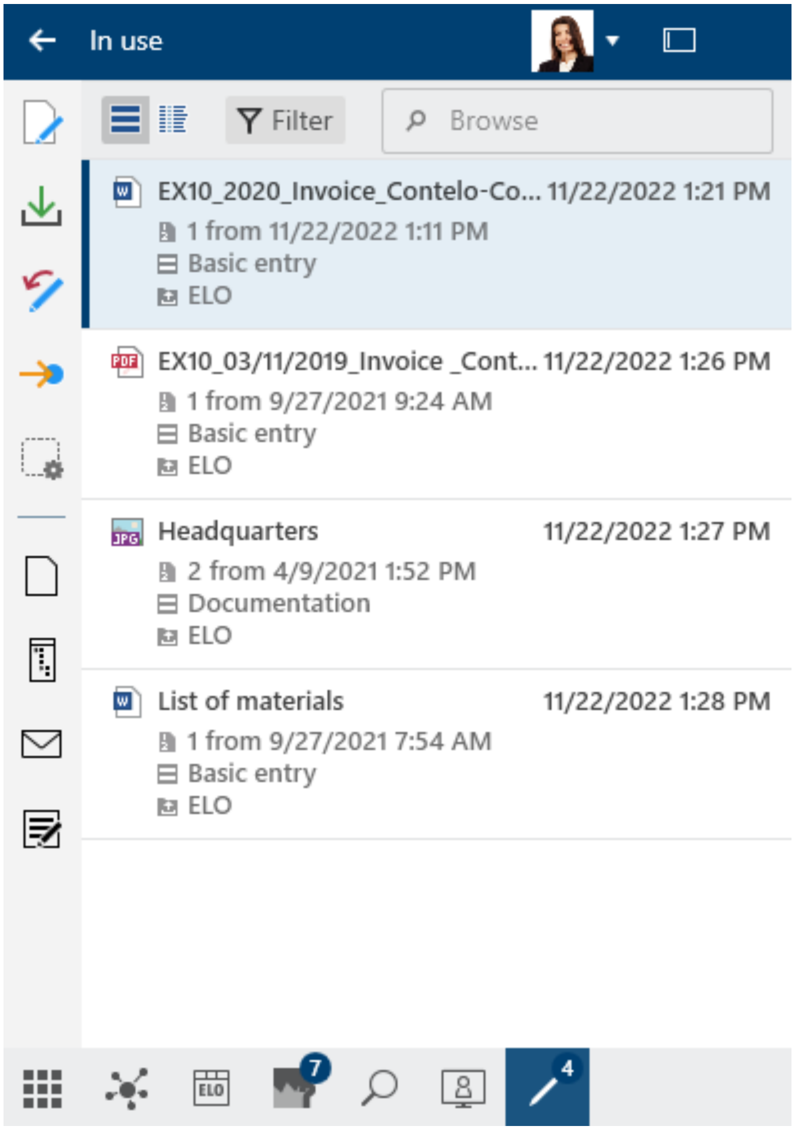
The toolbar and favorites bar are also available when selecting an ELO link in the Windows Explorer or Windows Desktop.

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' work area

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 the keyboard shortcut CTRL + 5.

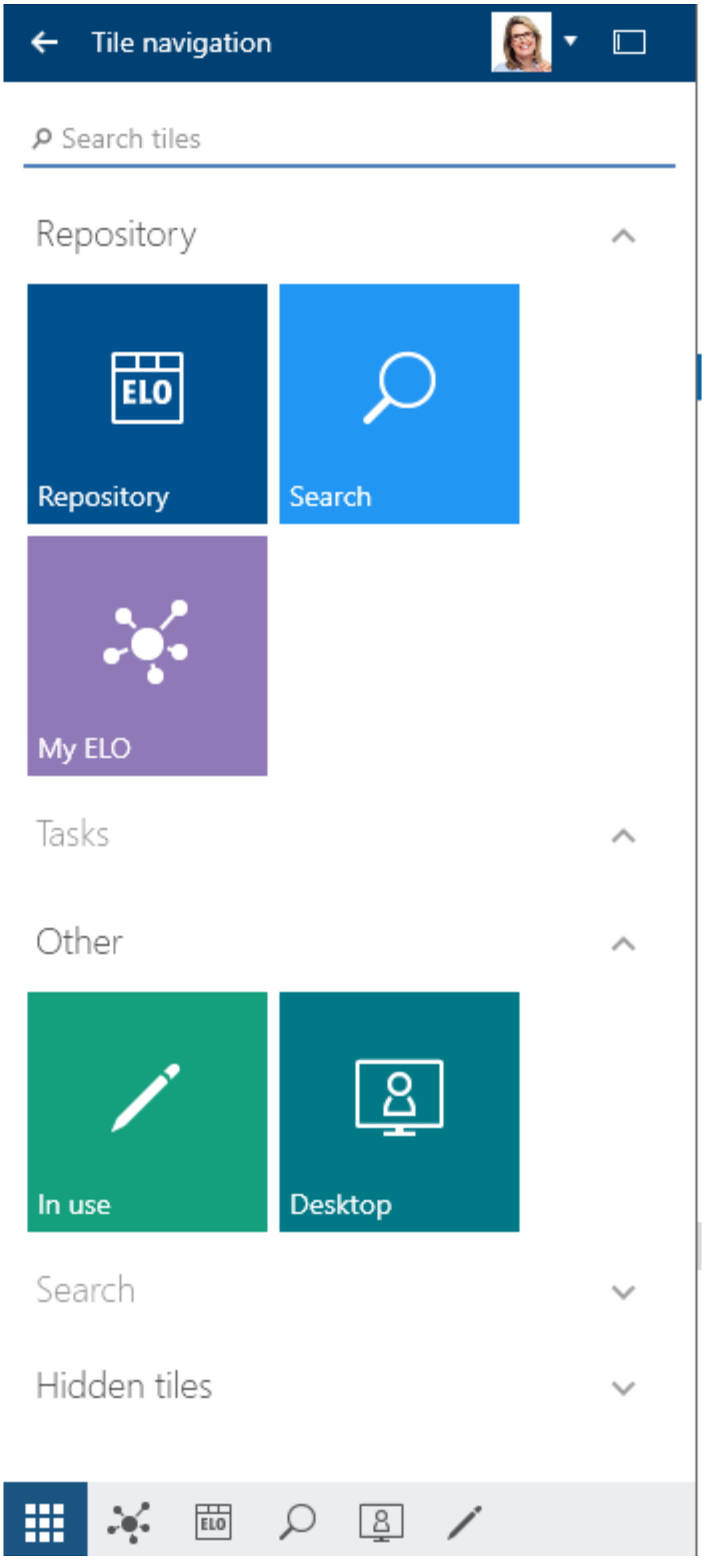


In the list of documents checked out for editing, you see the documents currently checked out or being edited. You can switch between the list view and table view using the two buttons at the top left. By selecting *Filter*, you can sort, group, and filter to narrow down the list. The search field next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

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 the keyboard shortcut 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.

The following tiles appear by default:

-

Repository
- My ELO
- Search
- Desktop
- In use

ELO Desktop Client Plus also has a Tasks tile.

Groups

By default, the tile navigation area is divided into the groups *Repository*, *Search*, *Other*, and *Hidden tiles*.

ELO Desktop Client Plus also has a *Tasks* group.

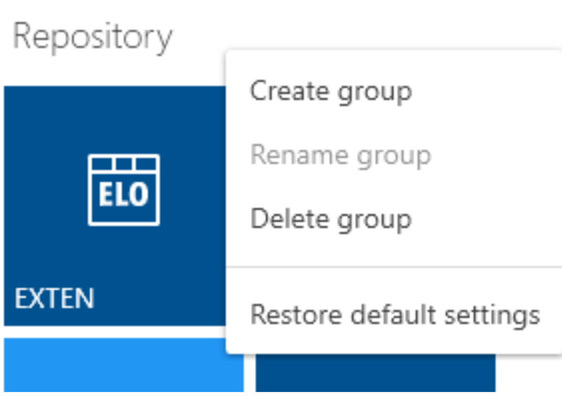
The arrow following the group title expands and collapses the group.

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

Edit via the context menu

You can edit the groups using the context menu. To open the context menu, right-click the group name.

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

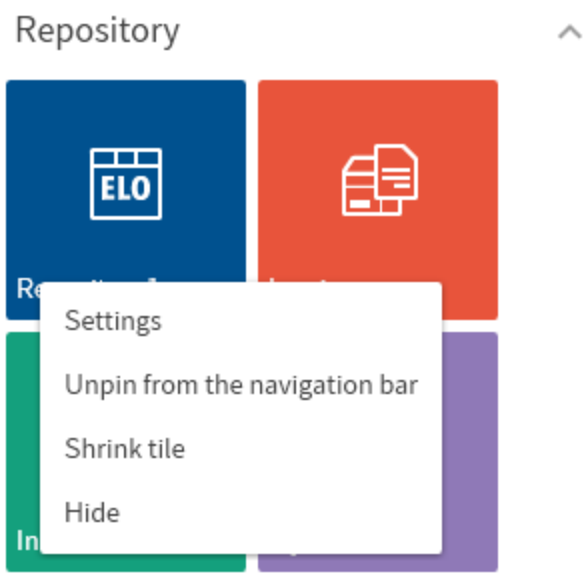


- Add group
- Rename group: This function is only available for your own groups. You can also access the *Rename group* dialog box by pressing the F2 key.
- Delete group: All tiles in the deleted group are moved to the *Hidden tiles* group.
- Restore default settings: This option enables you to revert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

Settings

Each tile has a context menu. Right-click the tile to open the context menu.

You can edit the following settings within the tile's 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.

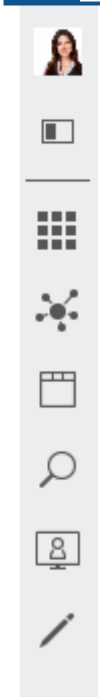
Header

The header is shown in all work areas.

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].

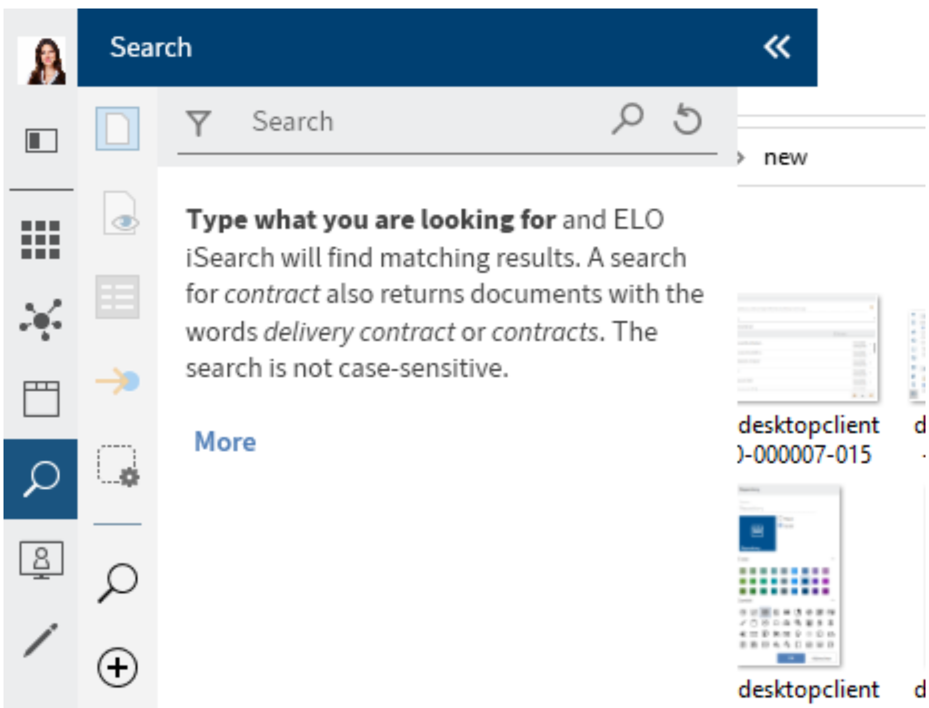
With the buttons next to the user menu, you can switch between the default view and the lean view. The desktop adapts to the view dynamically.

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.

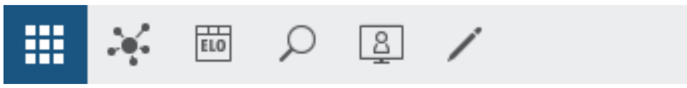
Toolbars

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:

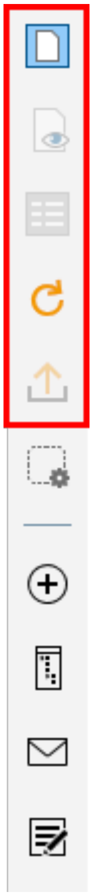
- New
- View
- Output
- Organize

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.

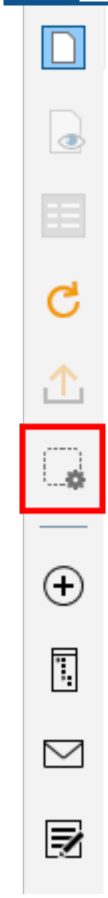
Favorites bar



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.

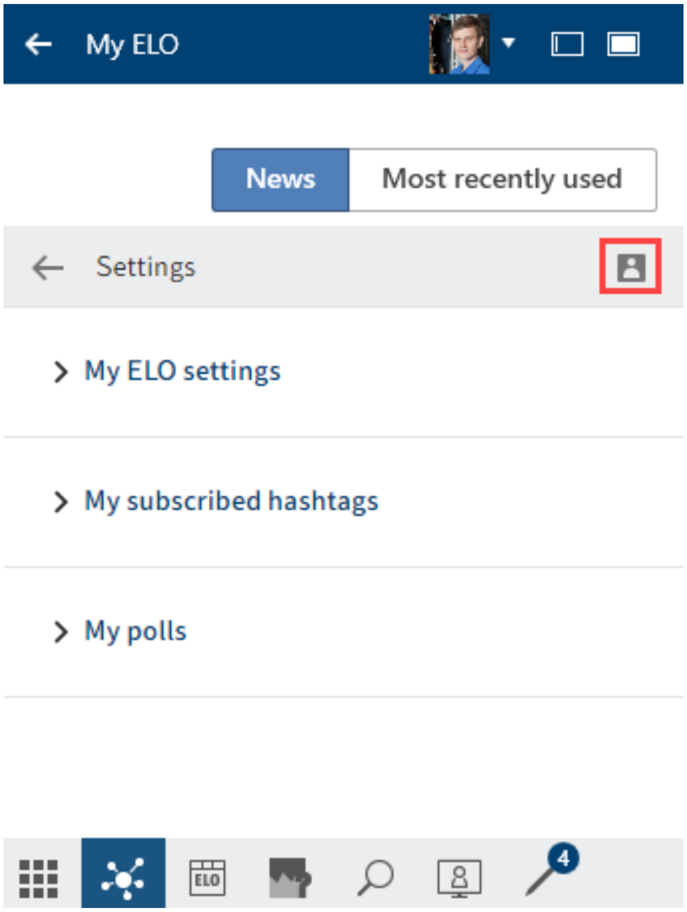
User menu [your name]

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.

You can find explanations on each of these buttons in the chapter User menu [your name].

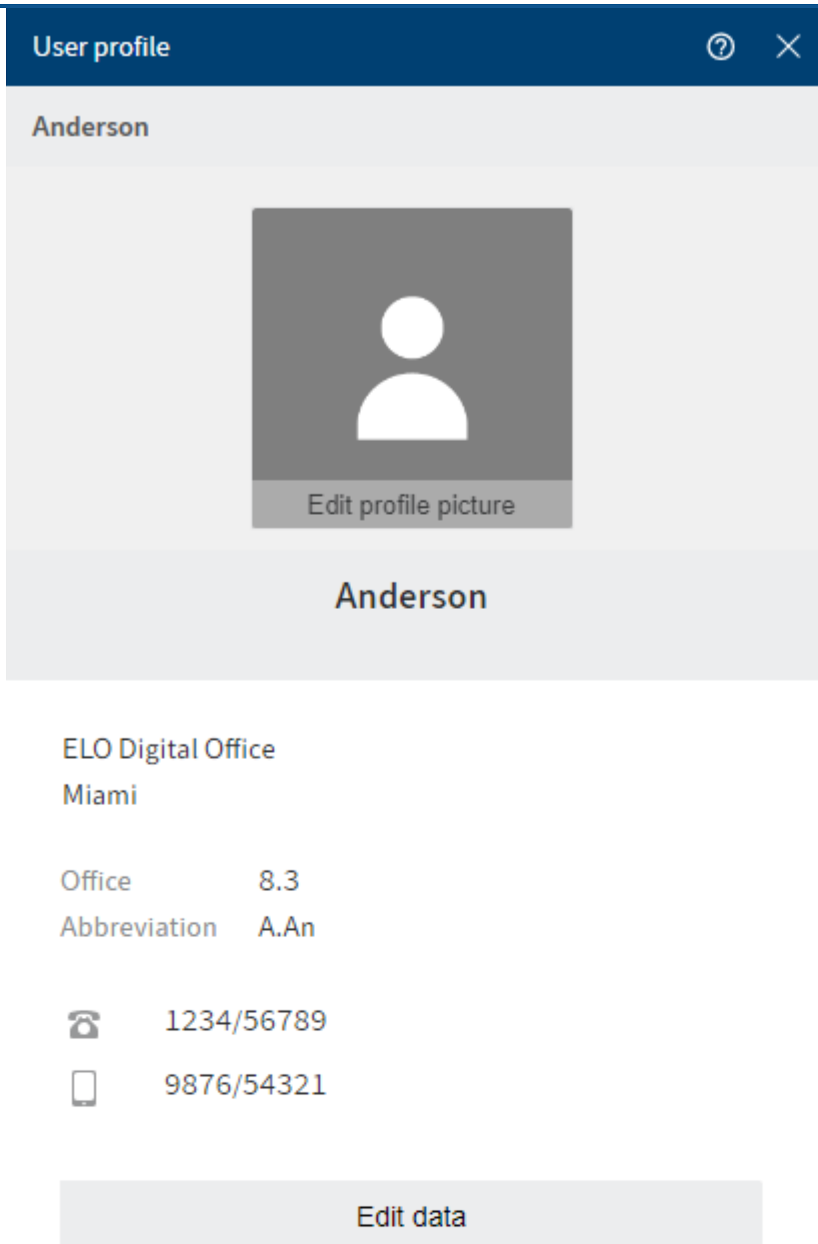
Profile



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

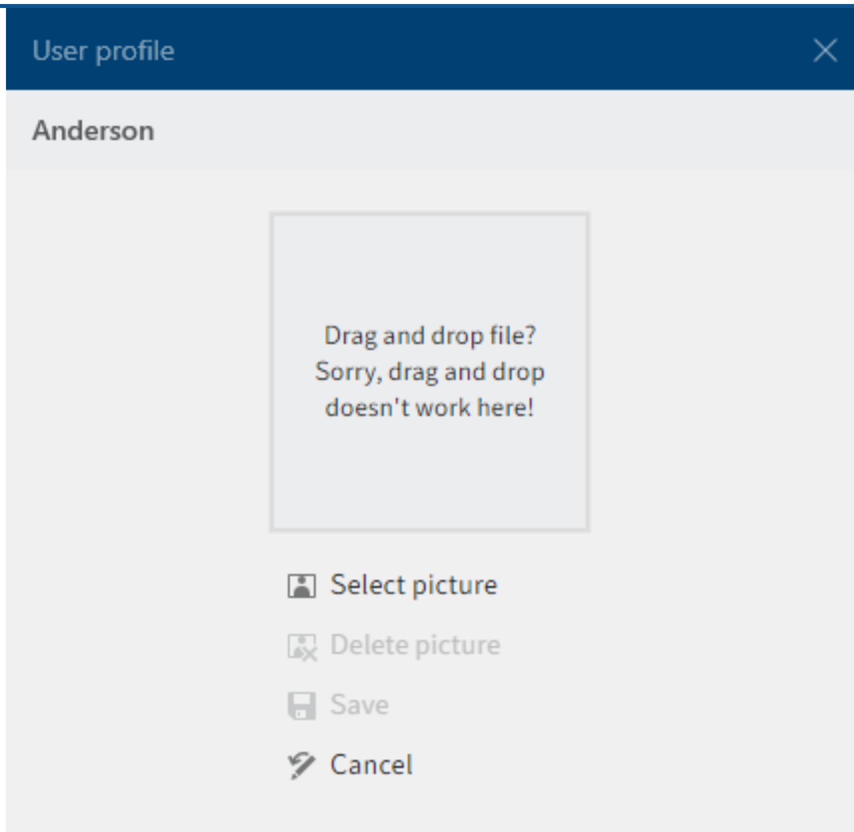
Method

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



The *User profile* dialog box opens.

2. Select *Edit profile picture*.



The dialog box for editing your profile picture opens.

3. Select *Select picture*.

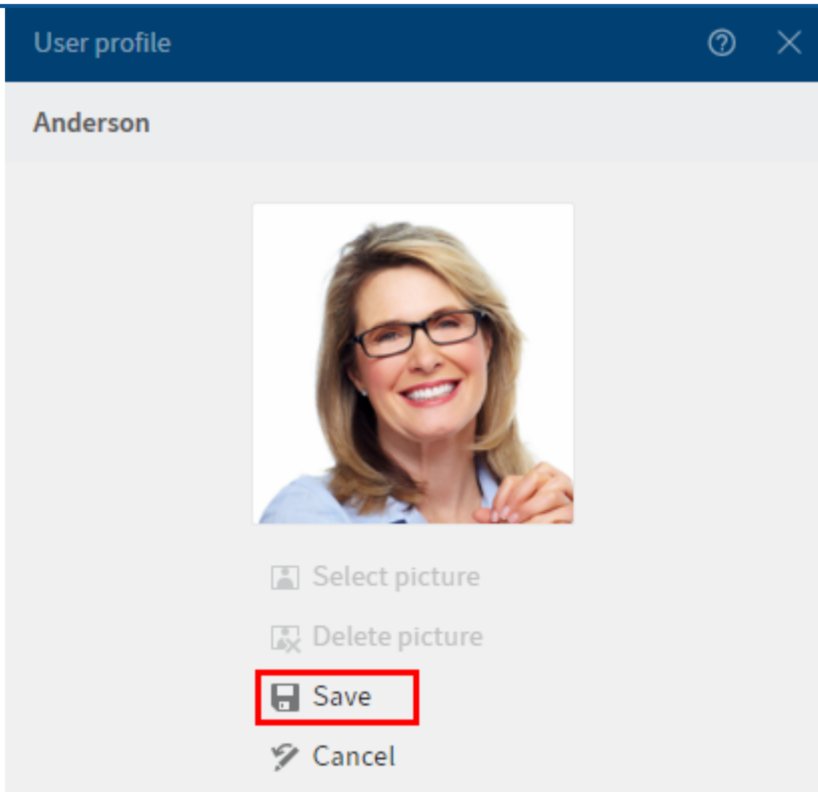
   A Windows dialog box for selecting a file appears.

   > **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*.

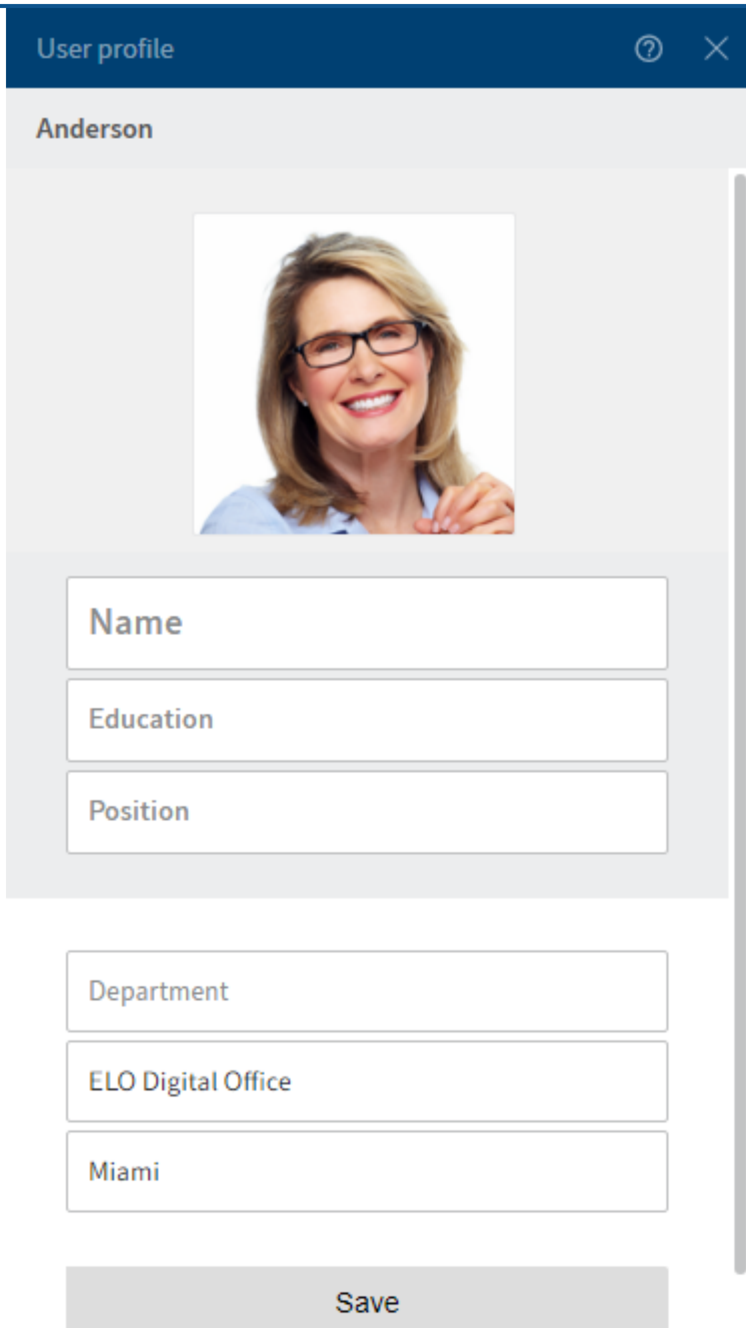
   The file is uploaded.



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*.



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.

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.

'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*.

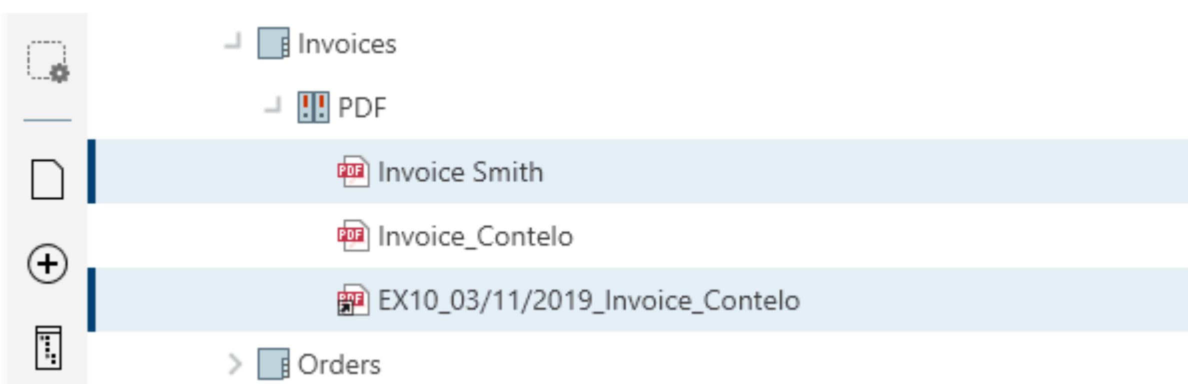
How do I use a function?

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*.

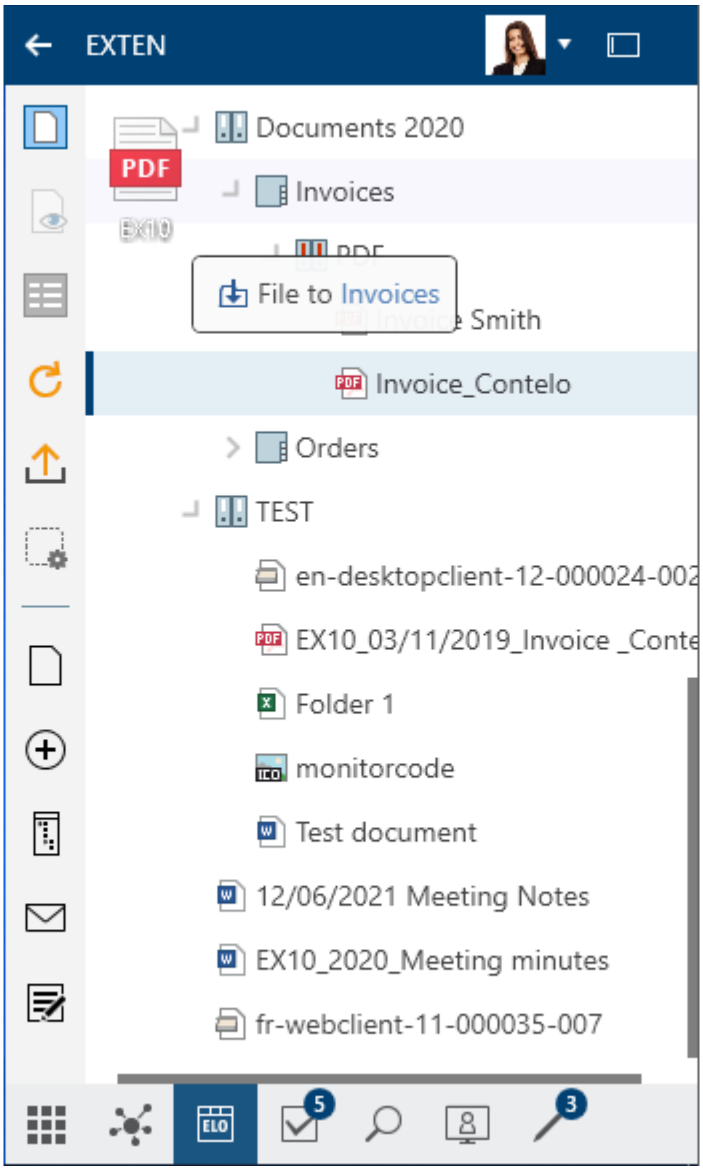
Drag-and-drop

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 Metadata section in the *Important components* chapter.

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.

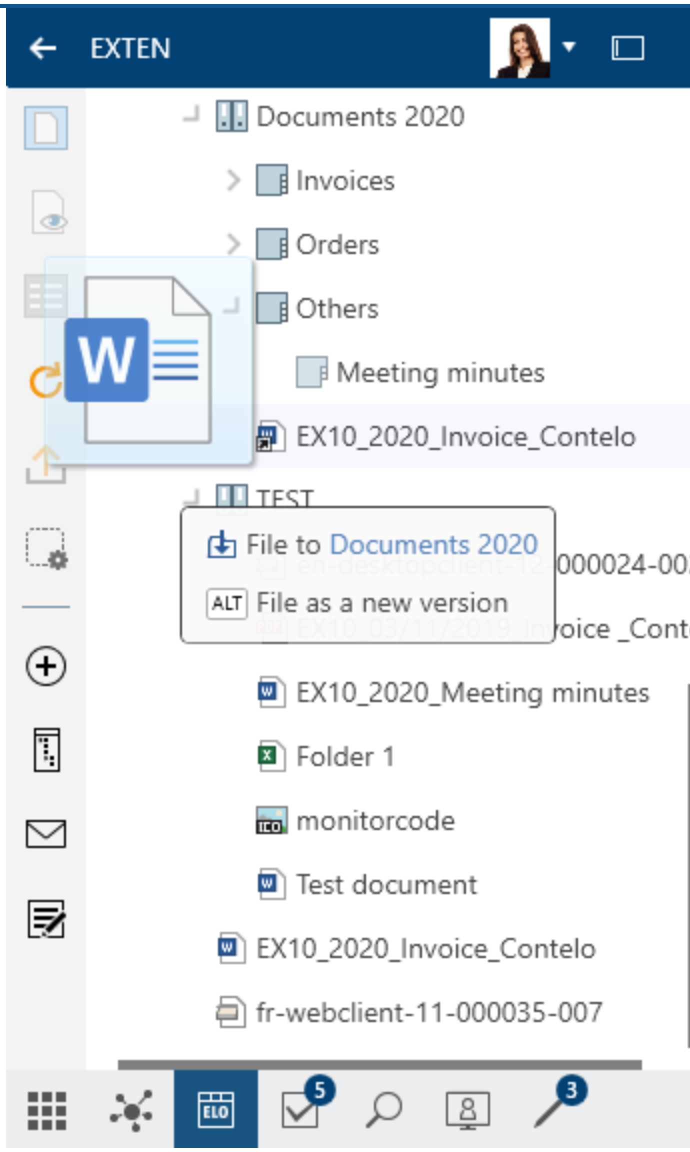
If you want to reference the entry, press the ALT key.

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 shortcuts

There are several keyboard shortcuts. With these keyboard shortcuts, you can open the different work areas or run functions.

Refer to the *Keyboard shortcuts* section in the Accessibility chapter.

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 *Repository* work area	CTRL + 1	Configurable
Open *Search* work area	CTRL + 6	Configurable
Open *My ELO* work area	CTRL + 7	Configurable
Open *Desktop* work area	CTRL + 8	Configurable
Open *In use* work area	CTRL + 5	Configurable
Open *Tasks* 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	

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 *Search* tab.
Select previous search (1)	CTRL + SHIFT + TAB	
Select previous search (2)	LEFT ARROW	Focus must be on the *Search* tab.
Open new search	CTRL + N	
Close search (1)	CTRL + F4	
Close search (2)	DEL	Focus must be on the *Search* 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

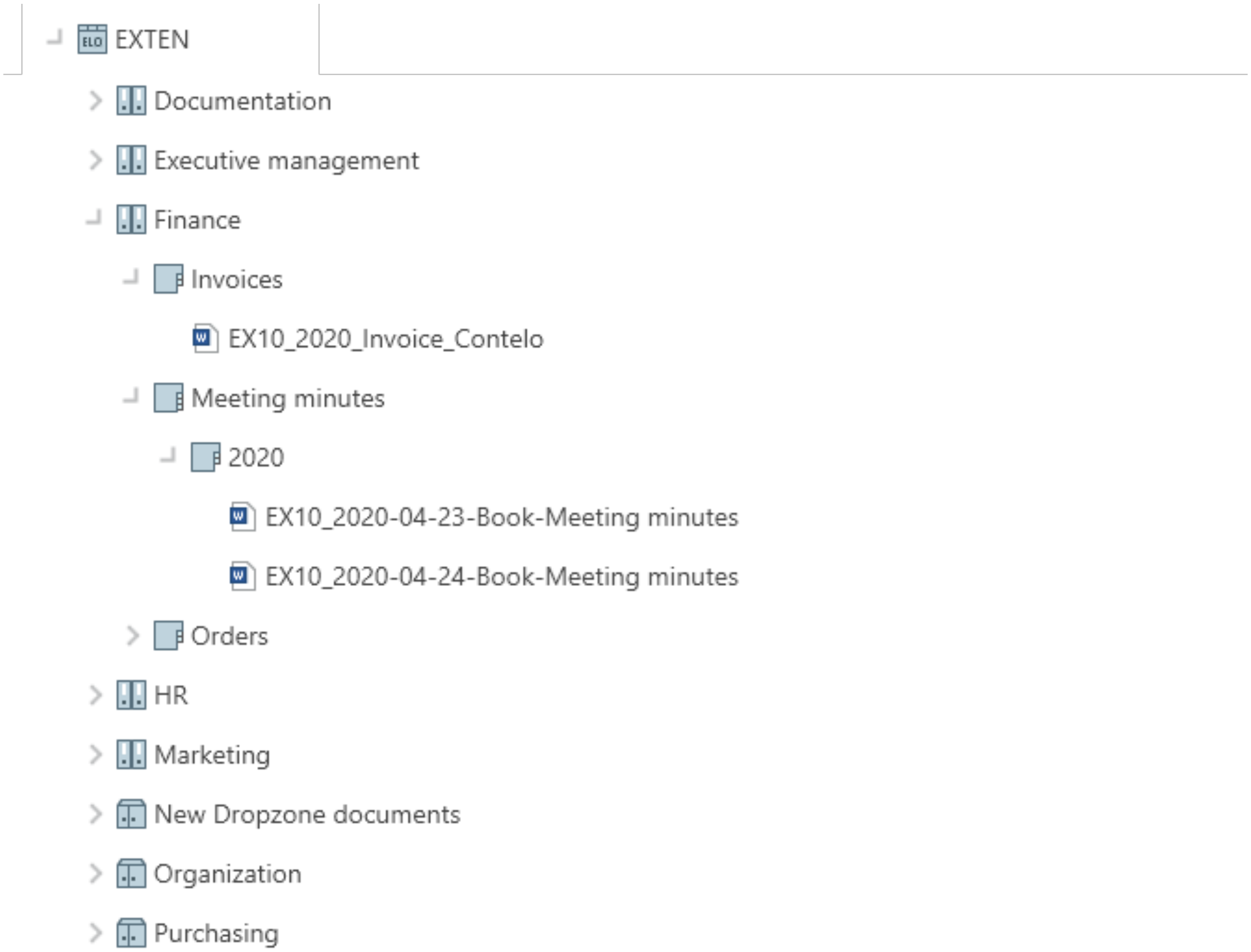
Dialog boxes

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

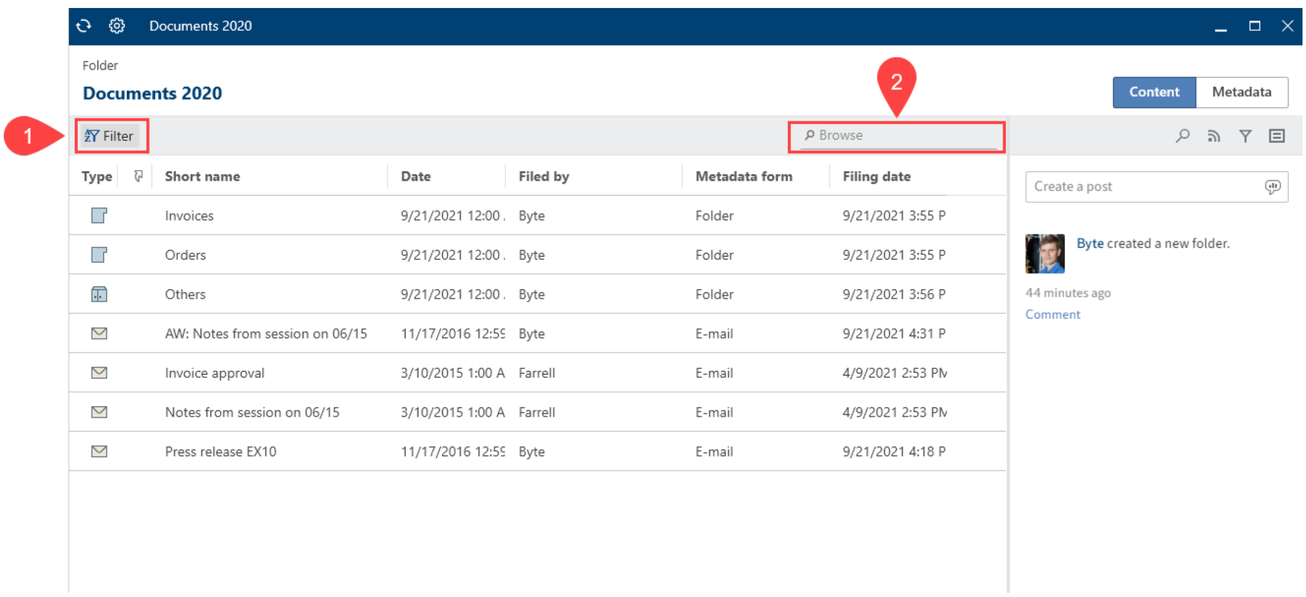
Entries (folders or documents) with an arrow icon are references. Select *View > Go to* on the toolbar to go to the original entry. From the context menu, select *Additional references* to access the original entry or other references to this entry.

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).

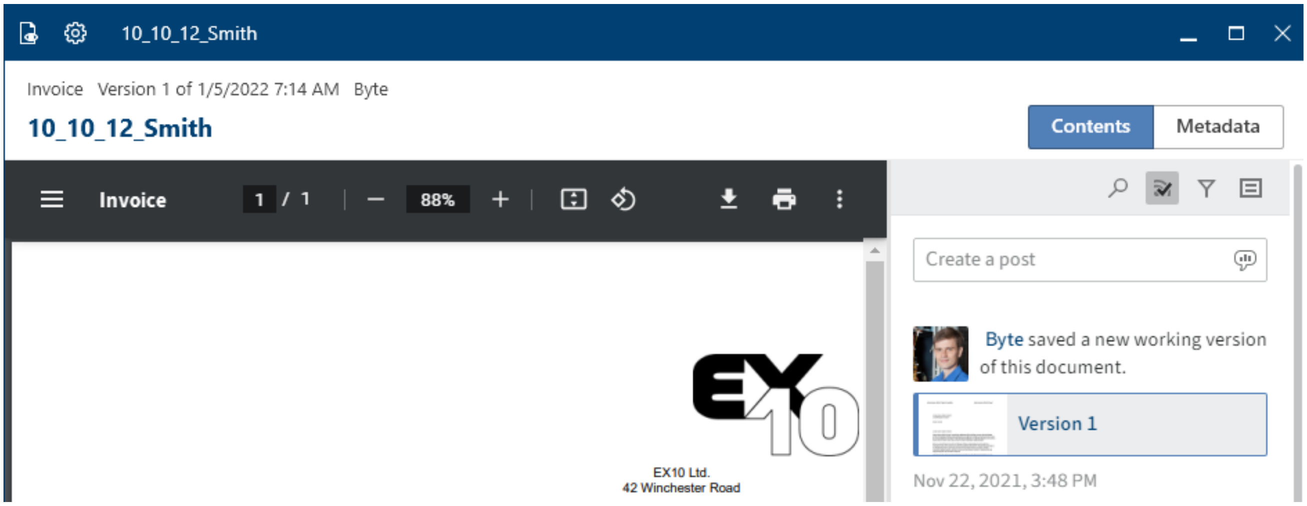
If you want to select multiple entries at once, you can only do this in the repository structure. You can find more information in the section How do I select multiple entries?.

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.

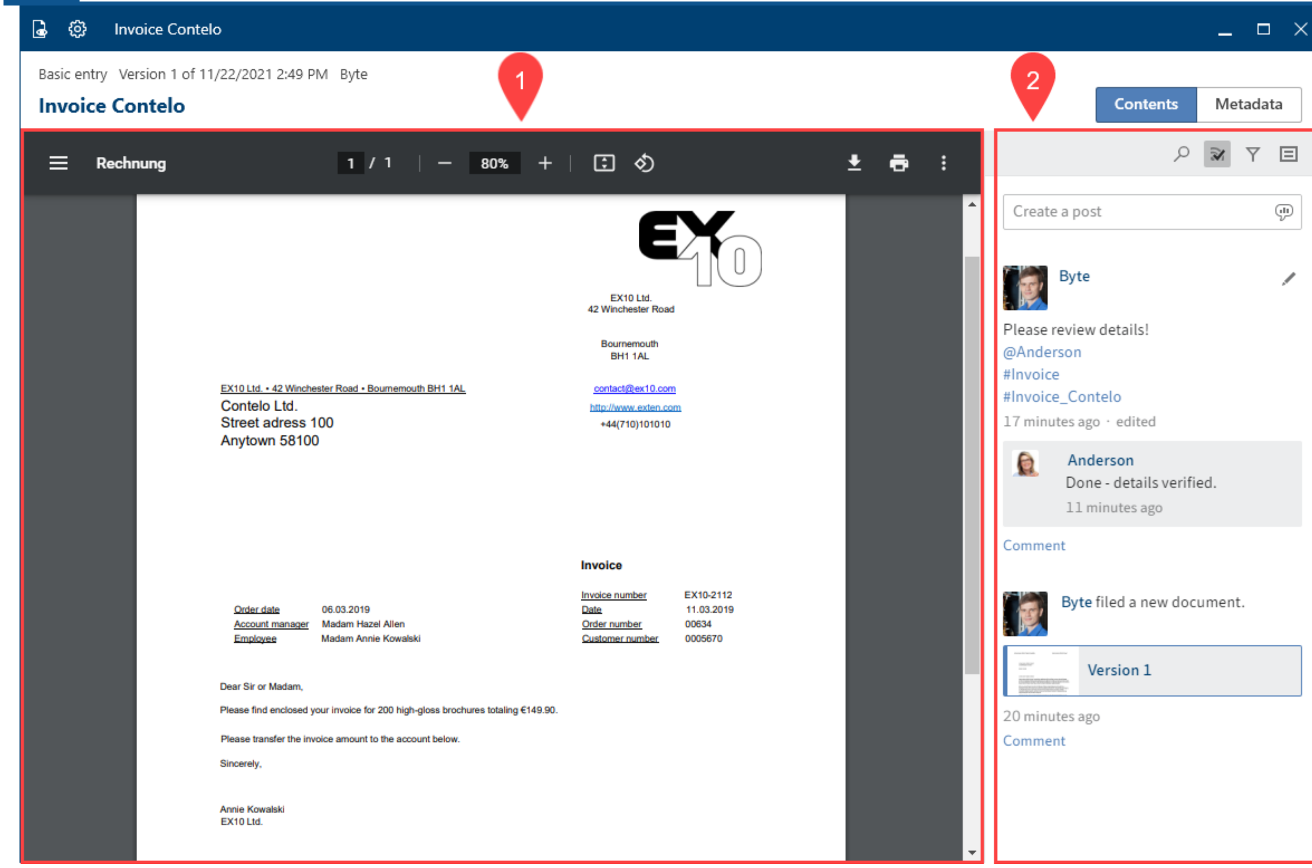


You have the following options for viewing the contents of a document:

- 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.

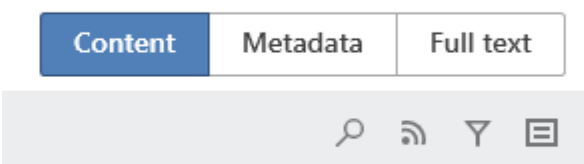
Viewer pane

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



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.

Show entries

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

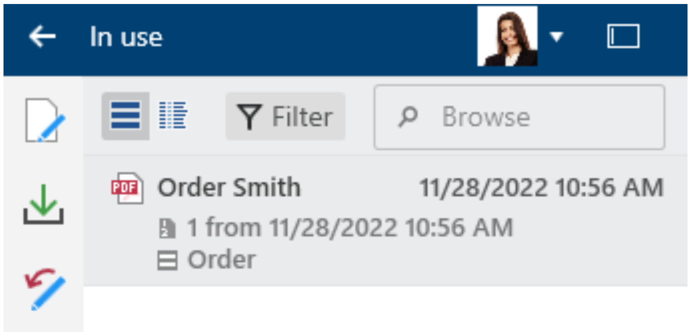
- List view
-

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.

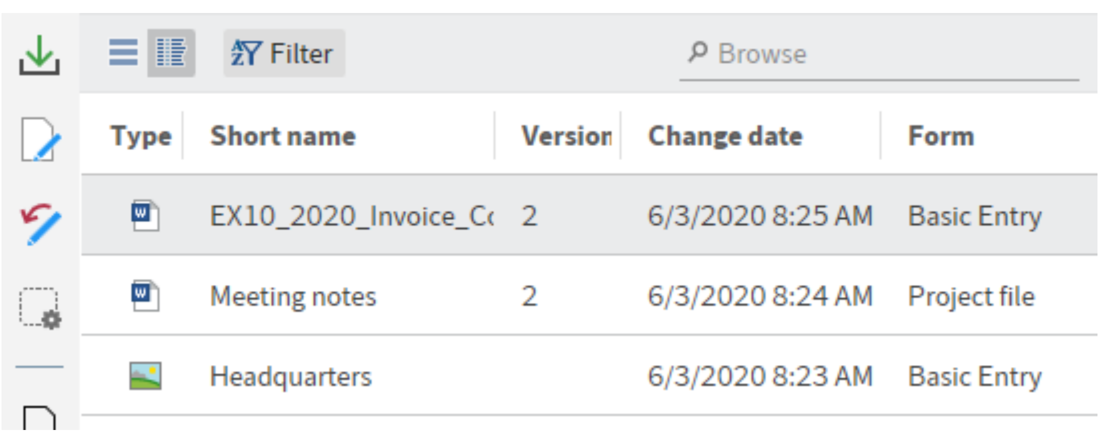


The following table explains the components of an entry.

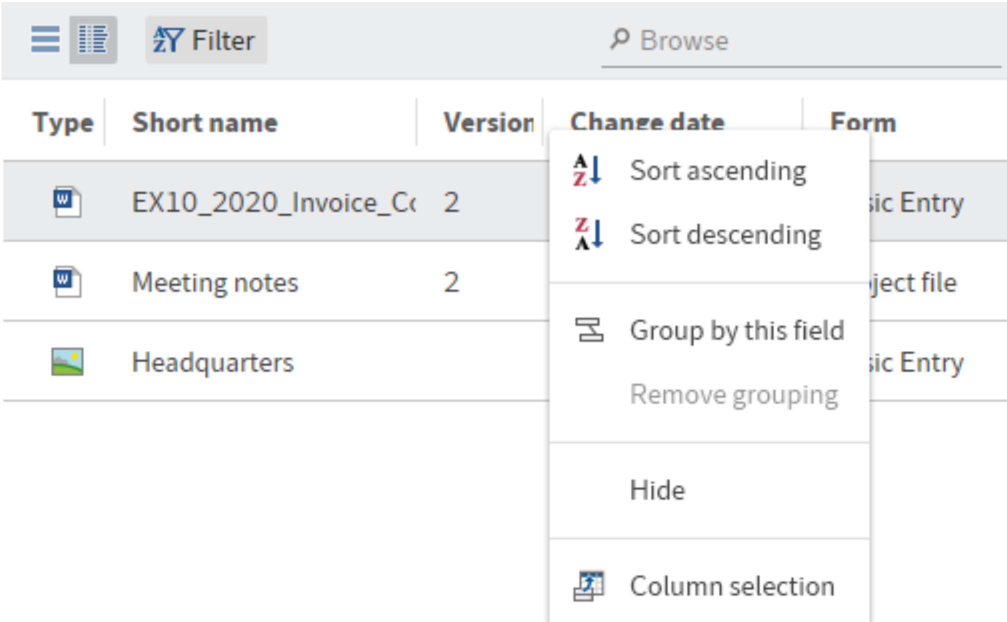
File type	PDF	This icon indicates the file type.
Short name	Order Smith	The short name is shown here.
Date	2/8/2022 3:41 PM	Here, you will see when the document was checked out.
Version	1 from 10/11/2022 9:06 AM	Here, you find the version number of the document and when it was filed.
Form	Order	Here,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

Table view

You can also view documents in use in table format.



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

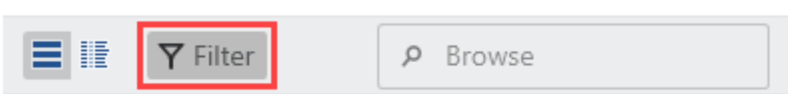


- Sort ascending
- Sort descending
- Group by this field: If you select the *Type* field here, for example, the individual file types are sorted in groups.
- Remove grouping
- Hide
- Column selection: You can add or hide fields in the table view.

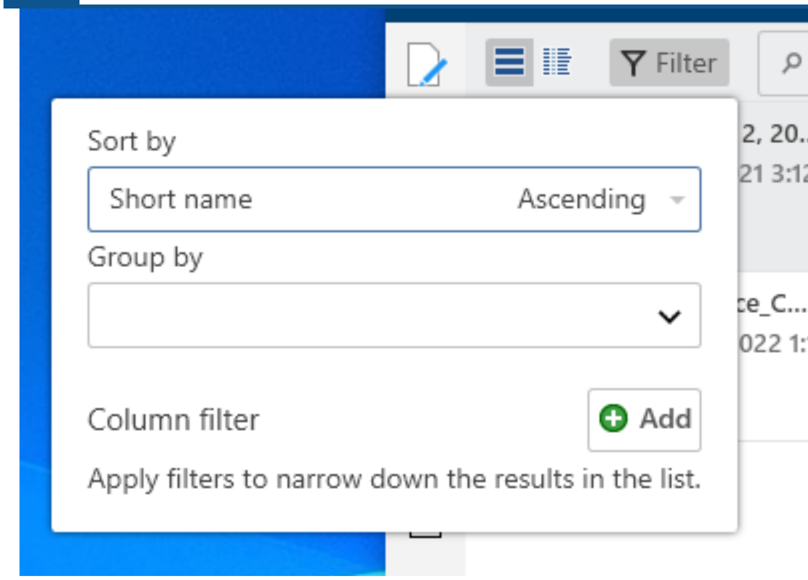
> **Information**
>
> The *Short name* field is mandatory and cannot be hidden.

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.

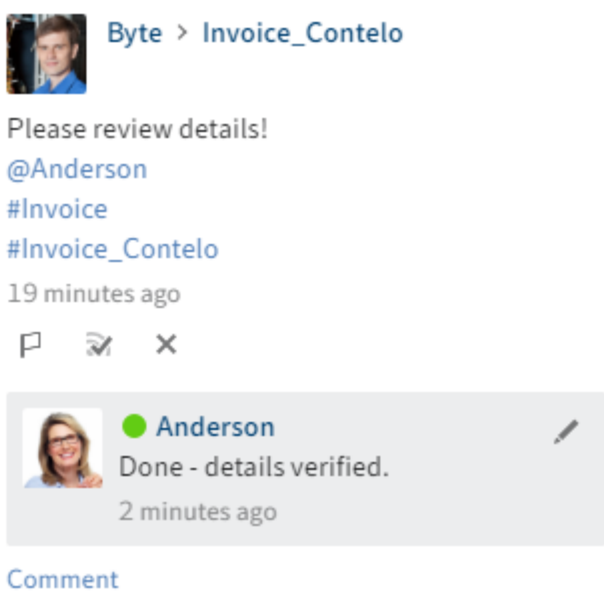
Metadata

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



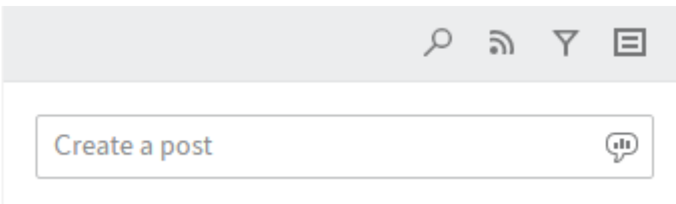
ELO offers several features that support collaboration within your company.

The feed is used to share information on an entry in ELO (document or folder) and track changes.

The following message types are shown in the feed:

- Posts
- Comment
- Polls
- Events (e.g. when a new version of a document is filed or changes are made to the working version)

Create post



Use the *Create a post* field to comment on the respective entry in a feed. Select *Create* to upload the post.

The text in posts, polls, and comments can be formatted with the following syntax:

Bold: To format a part of the text in bold type, place an asterisk (*) at the beginning and end of the desired text section.

`"I would like to stress this *again*."` becomes: "I would like to stress this again." in the ELO feed.

Information

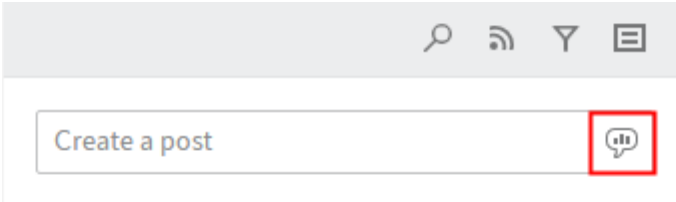
If you want the asterisk to appear as a character in the text, enter a backslash before the asterisk. The asterisk does not have a formatting function, but appears instead.

Click *Create* to post the comment.

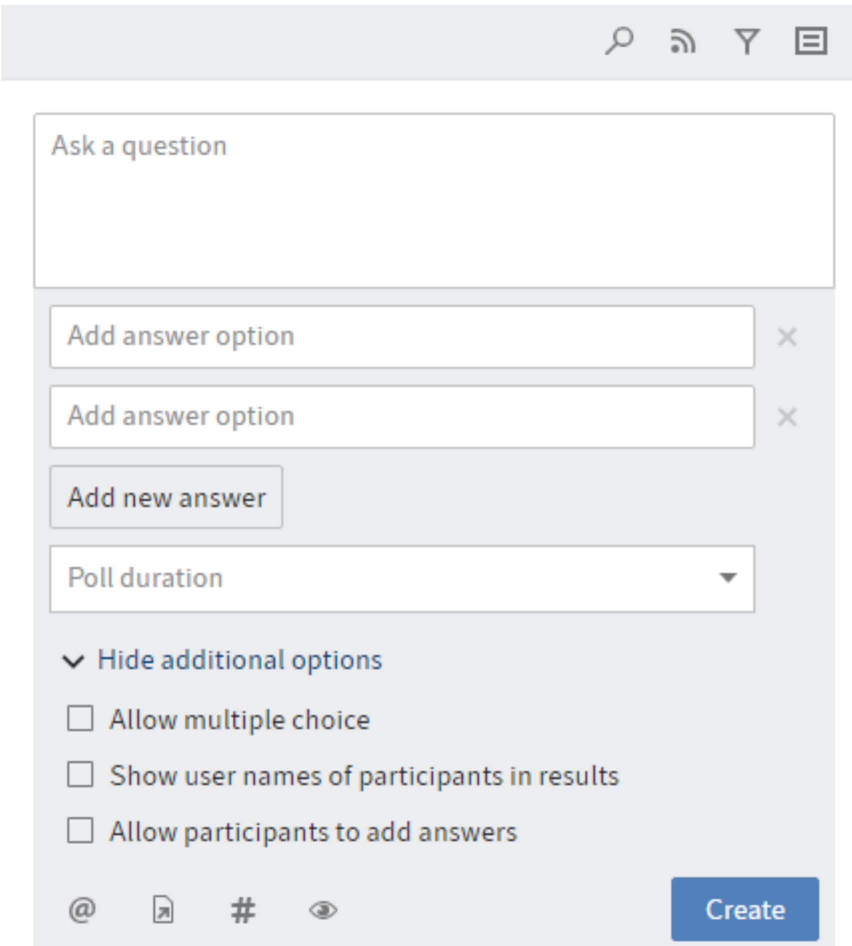
Please note

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.

Poll



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



Poll duration: You can select how long you want the poll to remain open in the drop-down menu. You can 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.

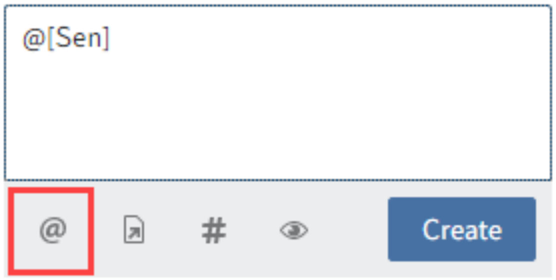
- Allow multiple choice
- Show user names of participants in results: The names are visible to all users participating in the poll. If this option is disabled, the poll is anonymous for you as well.
- Allow participants to add answers

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.

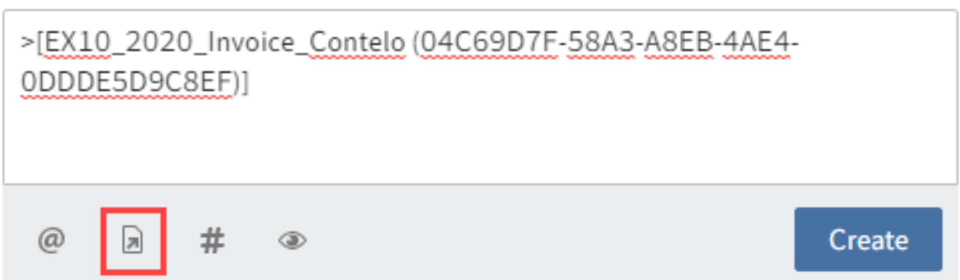
Mention



Use the *Mention user* function (@ icon) to address your feed post directly to another person or group. The users mentioned then see the corresponding feed post in the *My ELO* work area.

Keyboard shortcut: As soon as you type an @ character, ELO automatically recognizes that you want to insert a mention. The *Select user* dialog box appears.

Reference

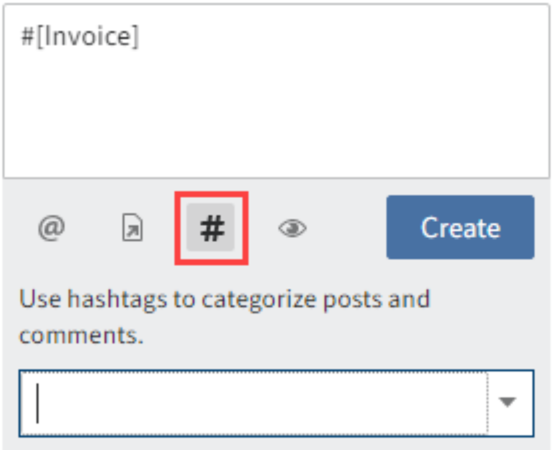


Select *Reference entry* (document icon with arrow) to link a feed post with an entry in ELO.

In the *Reference* dialog box, select an entry you want to reference. The reference jumps directly to the respective entry.

Keyboard shortcut: As soon as you type a > character, ELO automatically recognizes that you want to insert a reference.

Hashtag



Use *Insert hashtag* (# symbol) to add hashtags to a post. You can subscribe to hashtags. You can also filter the *My ELO* work area by hashtags.

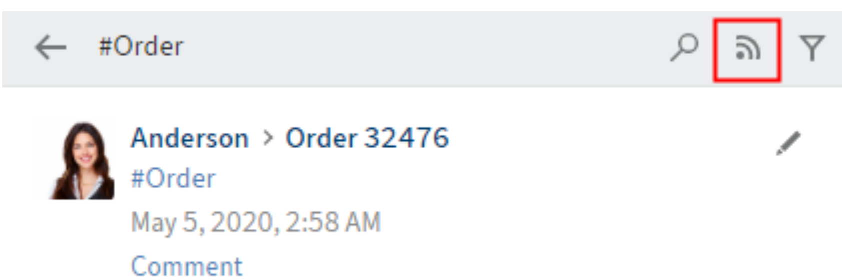
Keyboard shortcut: As soon as you type a # character, ELO automatically recognizes that you want to insert a hashtag. The hashtag drop-down menu opens.

Subscribe to hashtag

If a feed post contains hashtags, you can subscribe to them.

1. Select the hashtag.

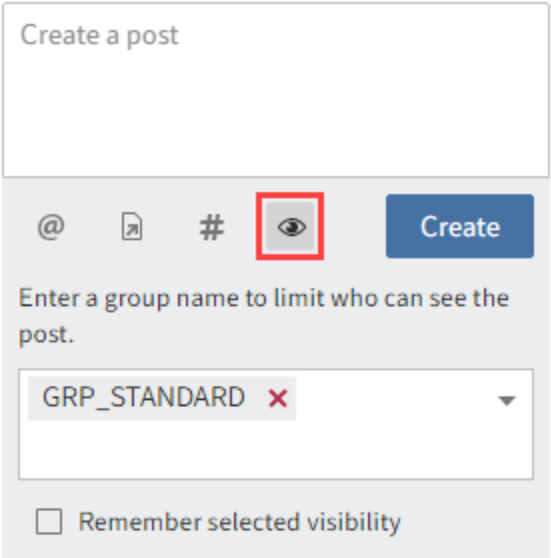
   The discussion page for the selected hashtag appears.

2. Select *Subscribe* (antenna icon).

You have subscribed to the hashtag. All posts that are marked with the corresponding hashtag appear in the *My ELO* work area.

Visibility



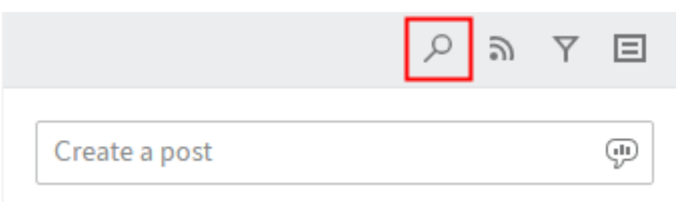
Use the *Restrict visibility* button (eye icon) to restrict who can read the post.

A drop-down menu with the available group names appears. Enter a group name or choose one from the list. You can also enter multiple group names and remove them using the X icon.

Your selection is applied. Only the selected groups can view your post.

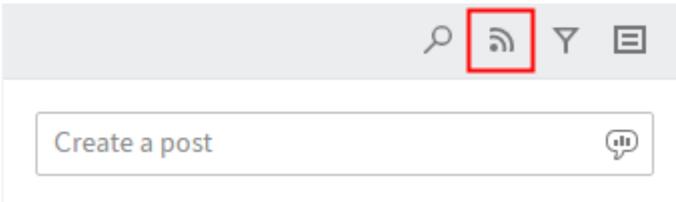
Optional: You can apply this restriction for future feed posts. Check the box next to *Remember selected visibility*. Your visibility settings will be set as the default for new feed posts.

Search feed



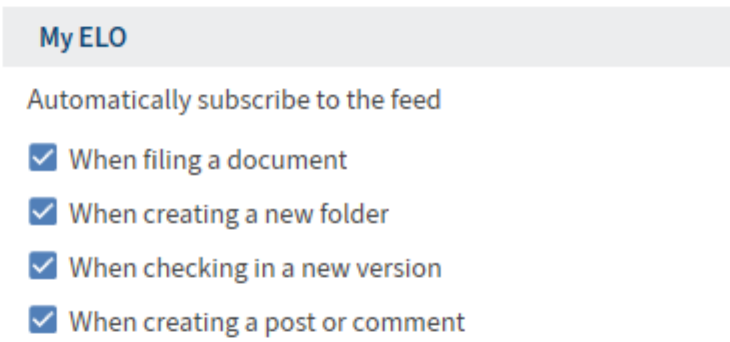
Selecting *Search feed* (magnifying glass icon) opens a search field that allows you to search within the currently selected feed. Clicking *Search feed* (magnifying glass icon) or pressing the ENTER key starts your search. When the searched term is found, the feed is restricted to the corresponding posts and matches are highlighted. Click *Reset search* (X icon) to exit the results list and return to the full feed.

Subscribe to feed



Select *Subscribe* (antenna icon) to subscribe to the feed. All subscribed feeds are aggregated in the *My ELO* area. Once a post is added to a subscribed feed, you also see the post in the *My ELO* area.

Automatically subscribe to feed

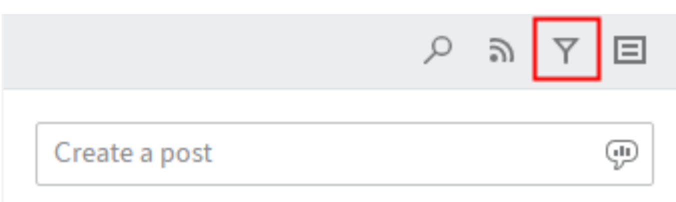


ELO provides you with the option to automatically subscribe to feeds. You can find the options in *Configuration > General > My ELO*. This concerns the following events:

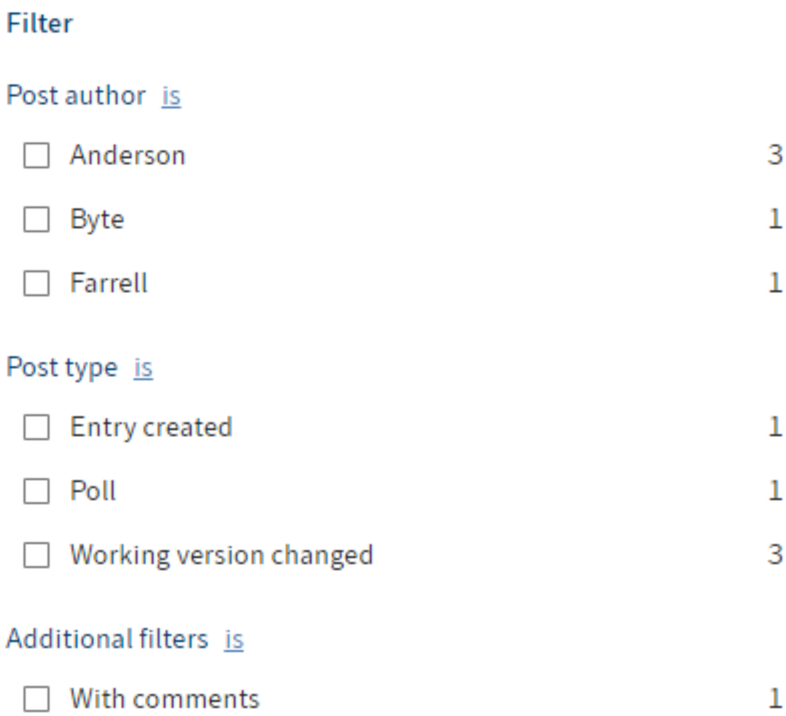
- When filing a document
- When creating a new folder
- When checking in a new version
- When creating a post or comment

Check or uncheck the boxes to set when to automatically subscribe to the respective feed.

Show filter options



Show filter options (filter icon) opens a window with filters for the corresponding feed. You can use these filters to restrict the feed to posts that match the respective filter.



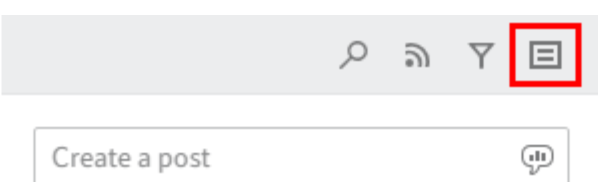
To apply a filter, select the corresponding filter in the list.

With the default settings, all filters are applied in *is* mode.

To negate the filter, select *is* and set it to *is not*.

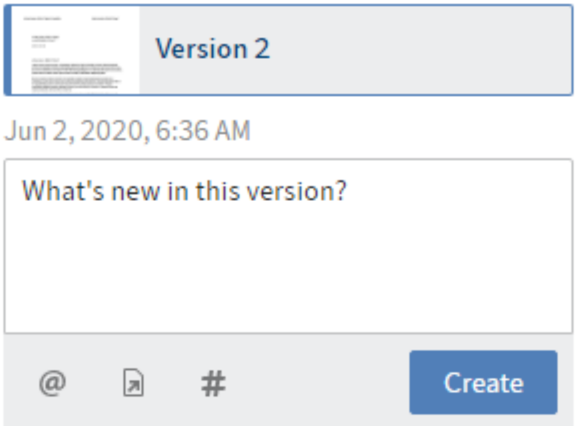
The mode can be switched to *is not* in all categories apart from *New since*.

Show metadata



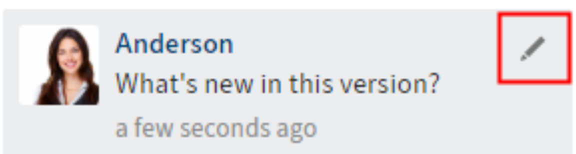
You can select the *Show metadata* button (document icon) to view the metadata of the entry. The metadata form associated with the entry is always displayed. The fields of the form are only displayed if they contain data. In gen. 2 metadata forms, only the form associated with the entry is displayed, even if you have completed other fields.

New comment



You can post comments in any feed. Post a comment by entering text into the input field below the feed post.

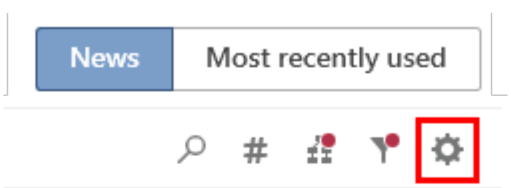
Edit



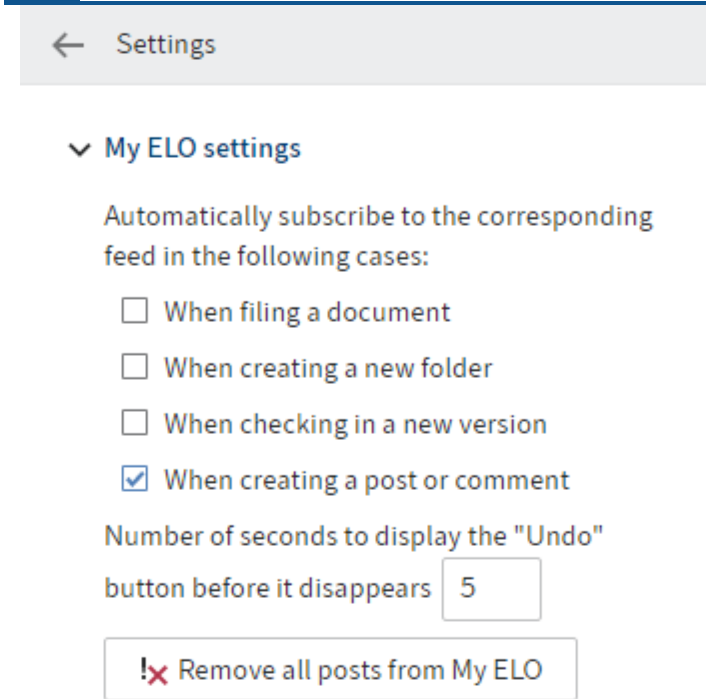
Select *Edit* (pencil icon) to edit your own feed posts and comments.

Settings

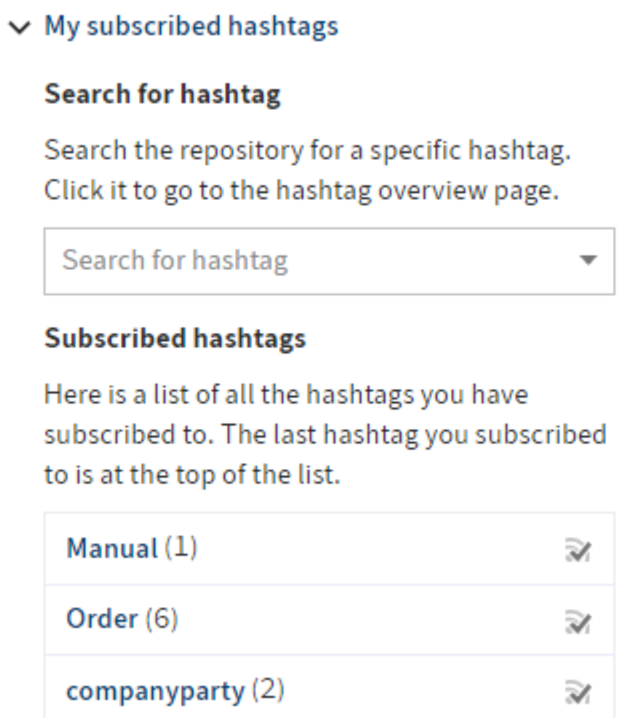
To open the settings for My ELO, subscribed hashtags, and your polls, open the *Settings* (gear icon).



In the *My ELO settings* area, you can choose when to automatically subscribe to feeds.

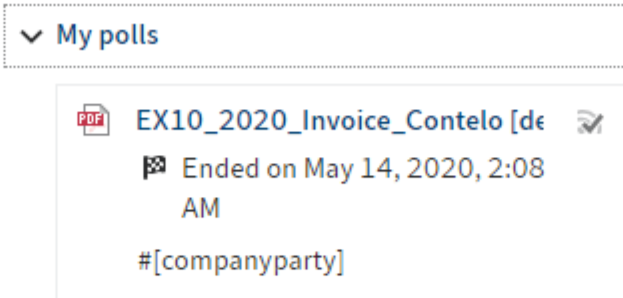


The settings for *My subscribed hashtags* are split up into two areas.



Search for hashtag: Select a specific hashtag from the drop-down menu. Clicking a hashtag brings you to the hashtag overview page, where you can subscribe to it.

Subscribed hashtags: This list shows all hashtags you have subscribed to. The number in parenthesis following the hashtag indicates how often it has been used in ELO. The last hashtag you subscribed to is at the top of the list. To unsubscribe, click the checkmark next to the hashtag.



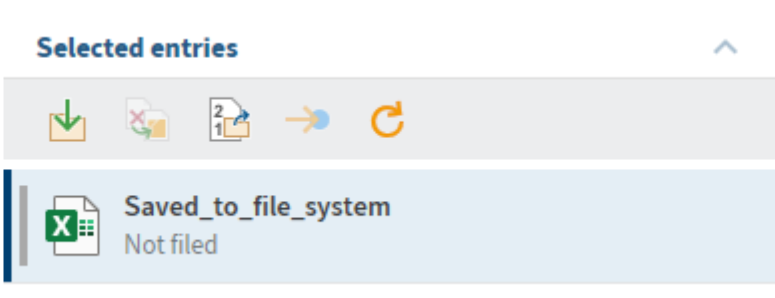
In the *My polls* area, you will see an overview of the polls you have initiated. To unsubscribe, click the checkmark next to the poll.

Status: Different statuses

Available in: *Desktop* work area

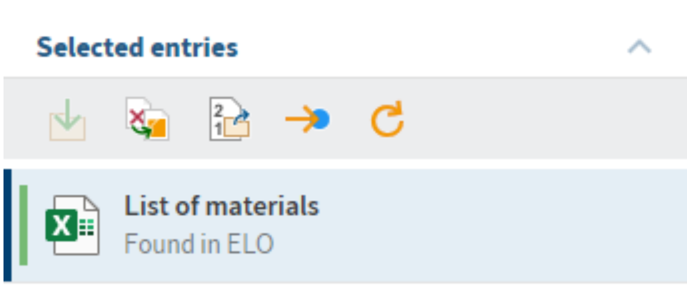
ELO recognizes the status of open Microsoft Office documents as well as files in the Windows Explorer and Windows Desktop. In the *Desktop* work area, the different statuses are indicated in the *Status* area.

'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

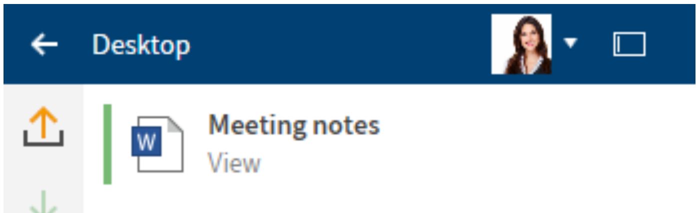


The document selected at the file system level is already filed to ELO. You can replace the selected file with an ELO link, file a new version of a document, or go to the location where the entry is filed in ELO.

Please note

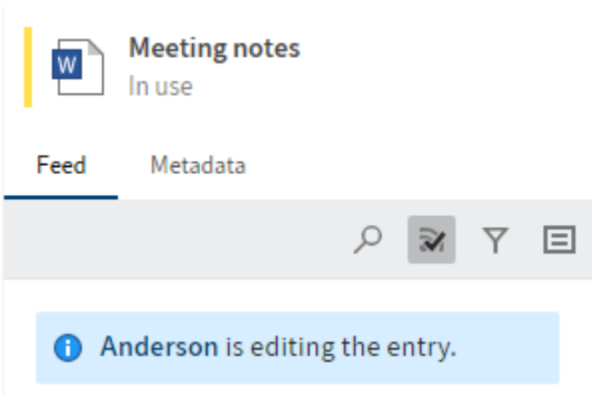
If you open the file from the Windows file system, ELO can no longer recognize the status due to a lock. In this case, you can either go to the location where the entry is filed in ELO or replace the file with an ELO link. We recommend checking the document out in ELO to edit it.

'View' status



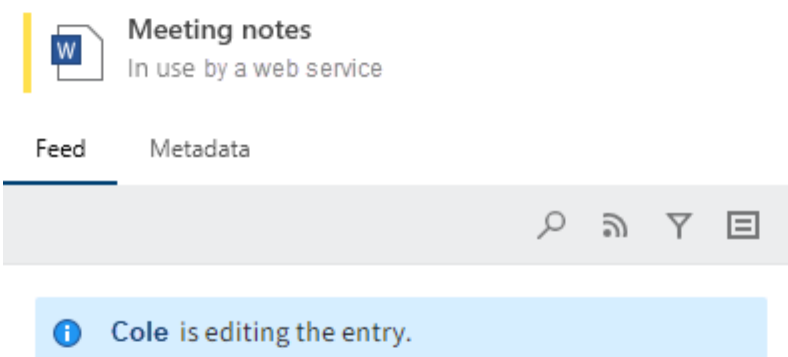
A document filed in ELO is opened for viewing in an external program. You can check out and edit the document or file it as a new version. Once you have changed and saved the document in an external program, the status switches to *In use*.

'In use' status



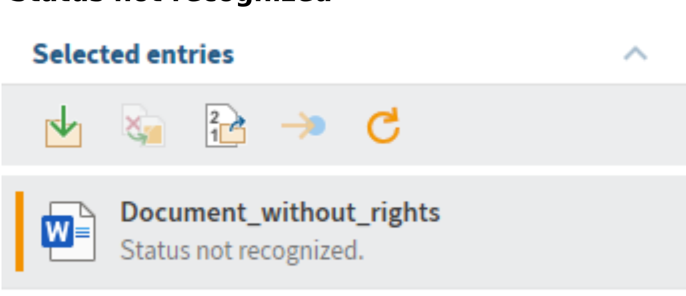
A document filed to ELO is currently being edited in a Microsoft Office program. You can check the document in, file it as a new version, or discard your changes.

'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.

Important actions in detail

This chapter is especially helpful for getting started. It explains how to perform basic actions.

Create new folder

Before you can file documents, you will need folders in the *Repository* work area.

The *New folder* function (or the INS key) creates a new folder entry in ELO.

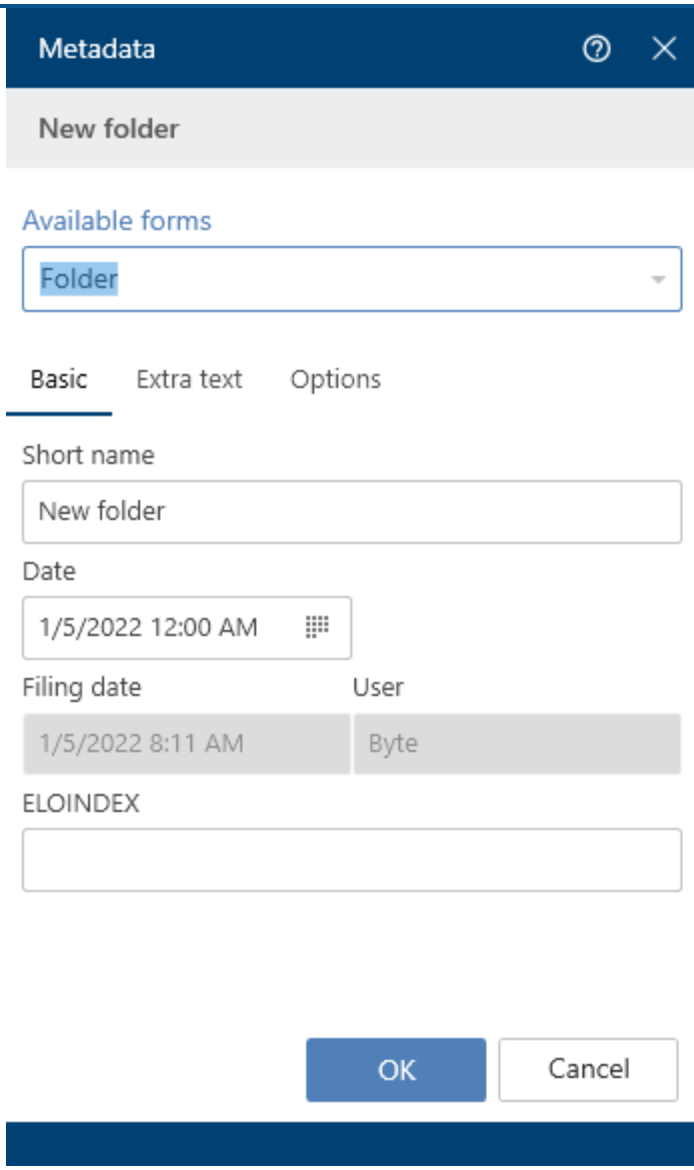
Related function

- Copy: If a folder with the basic structure you need already exists, you can copy this basic structure without content.

Method

1. In the repository, select the folder where you want to create the new folder.
2. On the toolbar, select *New > New folder*.

   Keyboard shortcut: INS key



The *Metadata* dialog box opens.

3. Enter a name for the new folder in the *Short name* field.

   Optional: If the new folder relates to a person, complete the *Personal identifier* and *End of deletion period* fields in the *Options* area.

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

Result

A new folder is created.

Outlook

Like physical folders, you can add contents to folders: You can create additional child folders or file documents directly to them.

Change folder name: If you want to change the name of a folder, proceed as follows:

1. Select the folder.
2. On the toolbar, select *Organize > Metadata*.
3. Change the name in the *Short name* field and confirm with *OK*.

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.

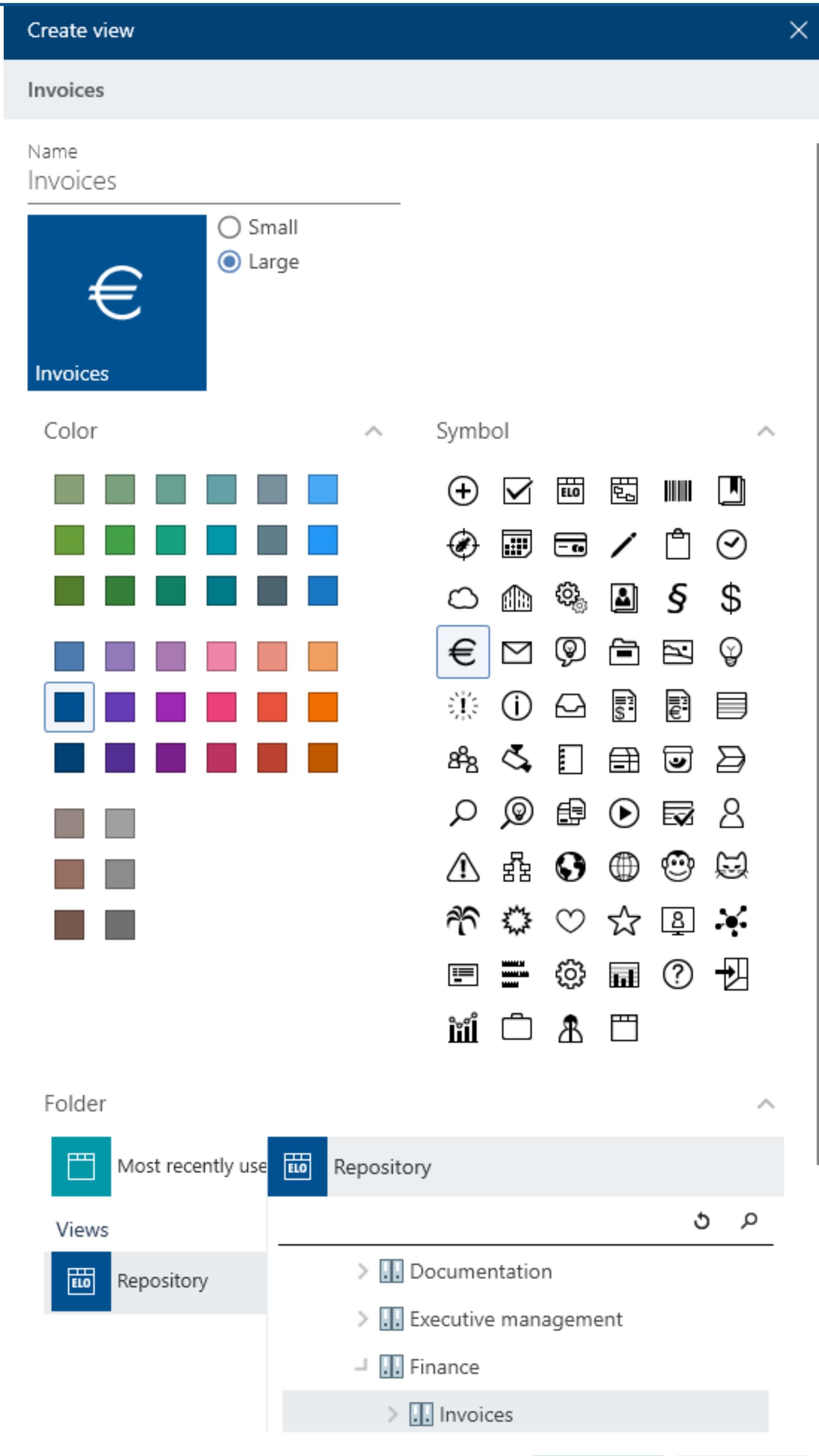
Related functions

- 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
Invoices
Color
Symbol
Folder
Most recently use
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

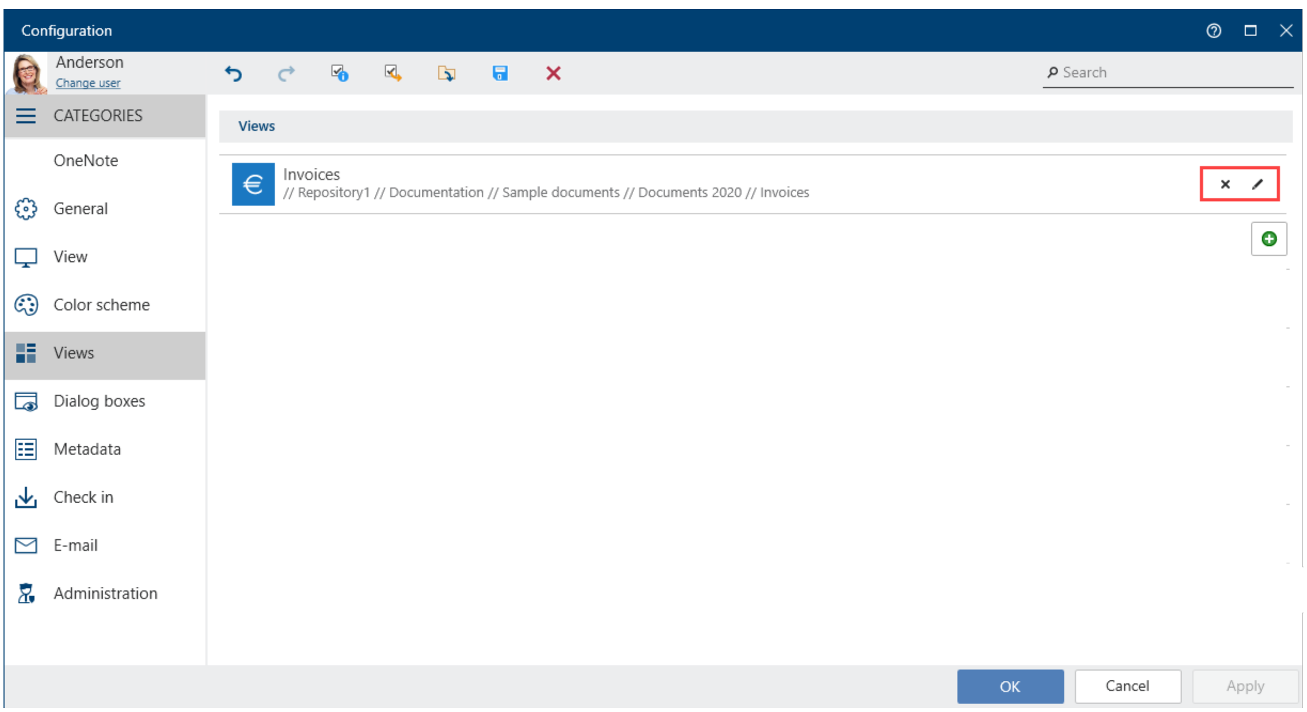
A tile is created for the new view under the *Repository* group in the tile navigation.

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.



Insert files/folders

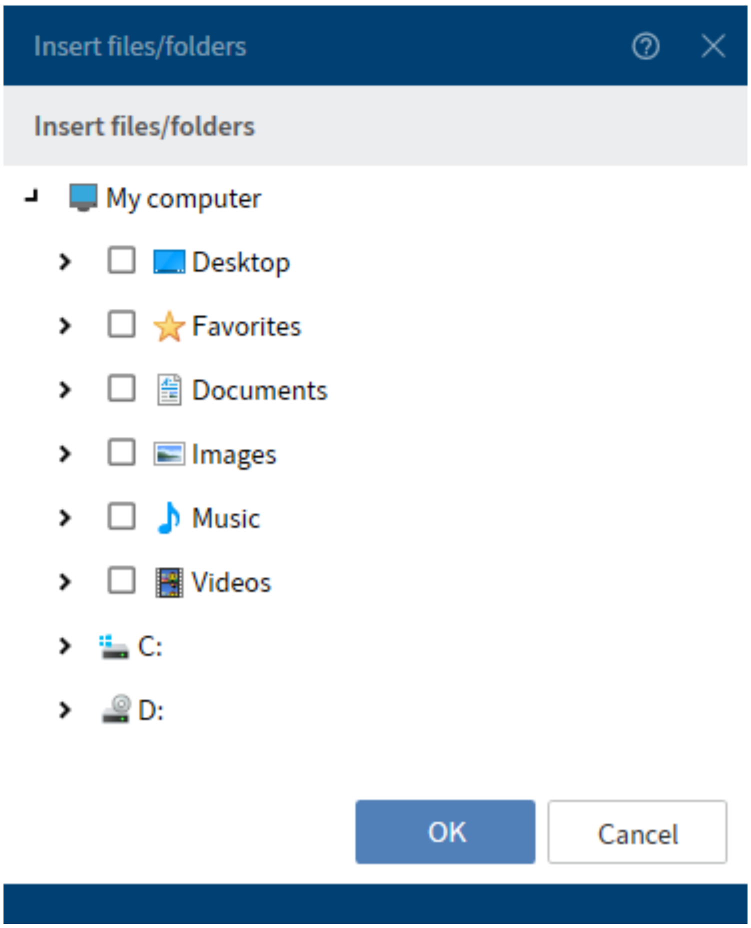
With the *Insert files/folders* function, you can file a document or folder from the file system to the selected folder in ELO.

Related functions

- Drag-and-drop: You can drag documents straight from your file system to a folder in ELO.
- Document from template: If you want to create a document from a template, use this function.

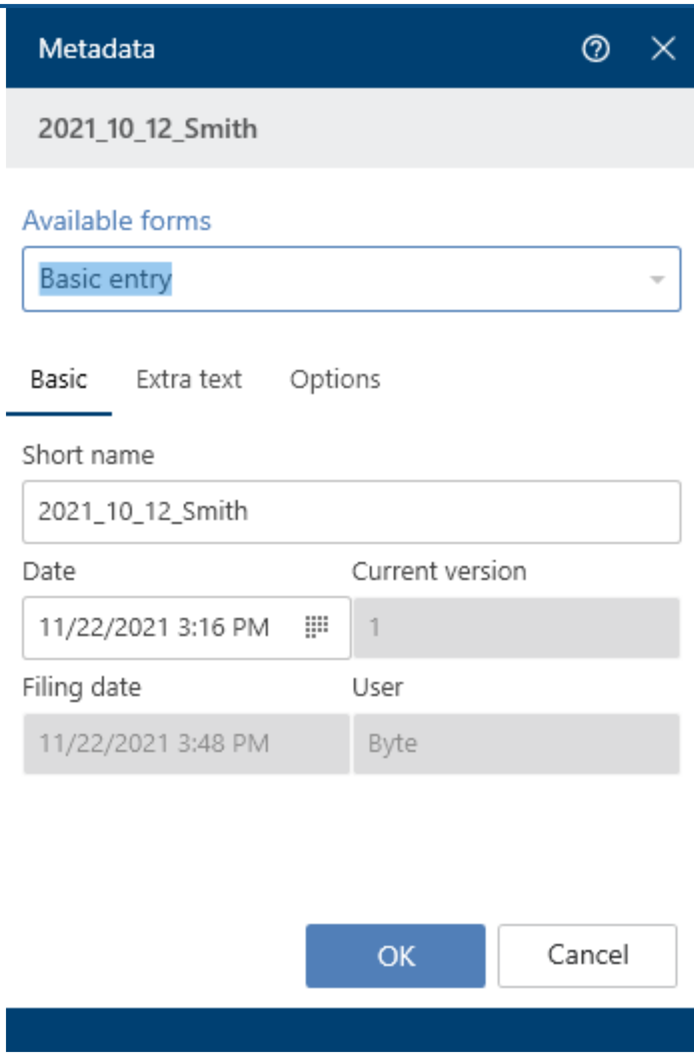
Method

1. Select a folder in the *Repository* work area where you want to insert a file or folder from the file system.
2. On the toolbar, select *New* > *Insert files/folders*.



The *Insert files/folders* dialog box appears.

3. Select what documents or folders you want to file by checking the corresponding boxes. You can select multiple.
4. Select *OK* to confirm your selection.



The *Metadata* dialog box opens.

5. Select a metadata form and enter the metadata. Confirm with *OK*.

Result

The files or folders are filed to the selected position in ELO.

Outlook

You can modify documents stored in ELO. If the document is version-controlled, a new version of the document is stored after you have made changes. The old version is retained.

Important functions for working with documents are:

- Check out and edit document
- Check in
- Load new version
- Send as ELO link
- Start workflow (only ELO Desktop Client Plus)

File a document from the file system to ELO

You can store a file from the file system in ELO and replace the file in the file system with an ELO link in order to prevent duplicate data.

In *Configuration > Dialog boxes > Multiple entries as an ELO link*, you configure the system so that filed documents are moved to ELO and an ELO link is created.

Related function

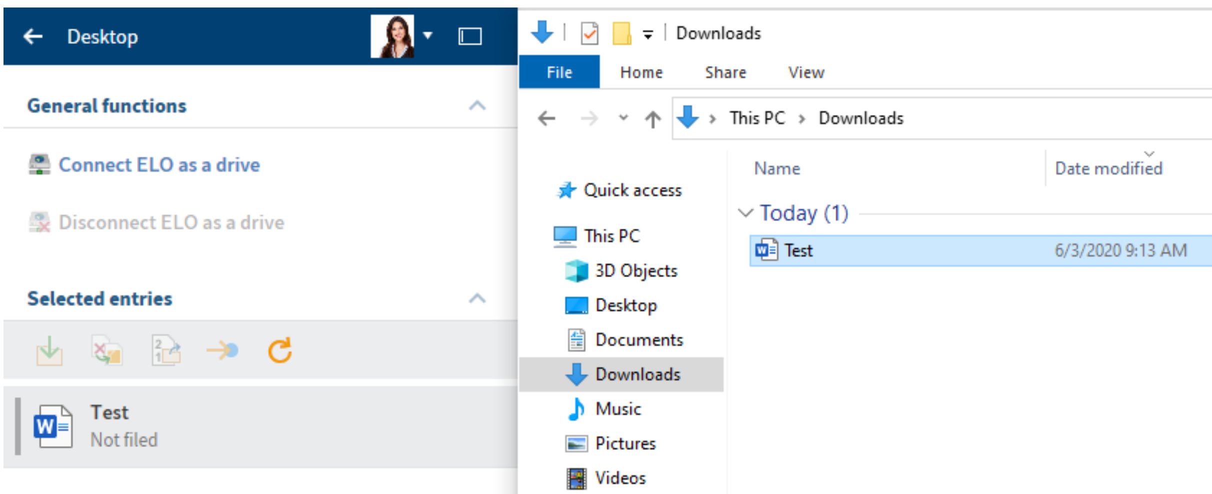
- Drag-and-drop

Method

1. Open the *Desktop* work area.

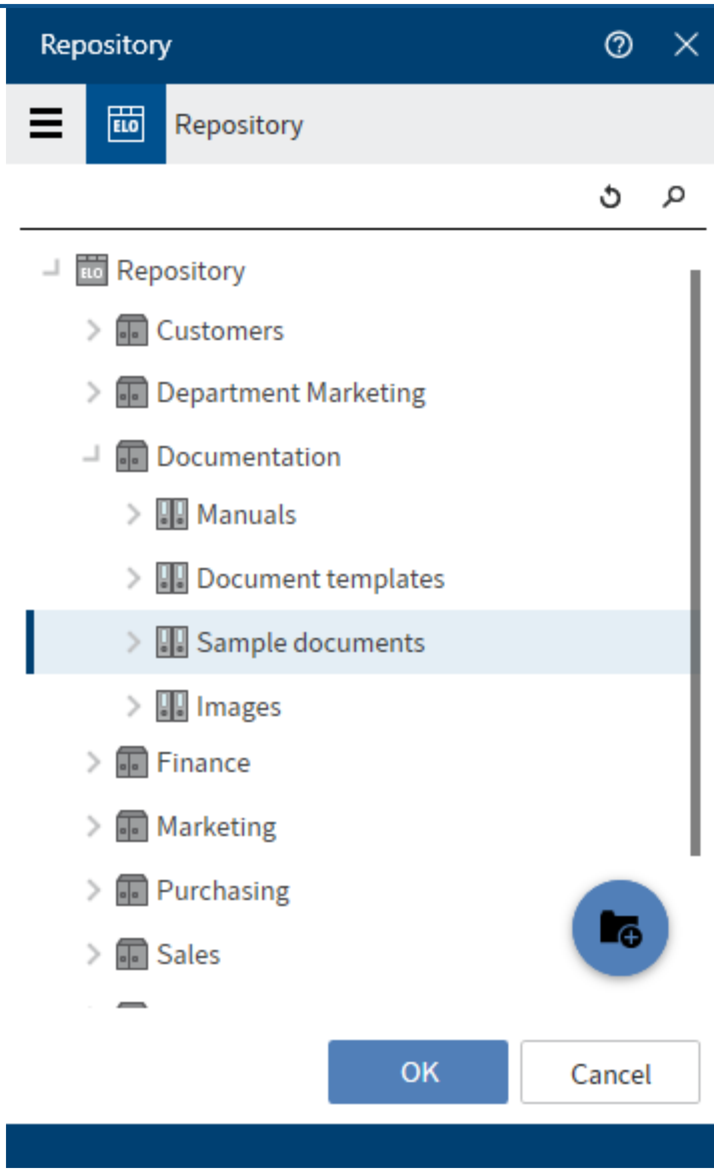
2. Also open the Microsoft Windows Explorer.

3. Select a file in the Windows Explorer.



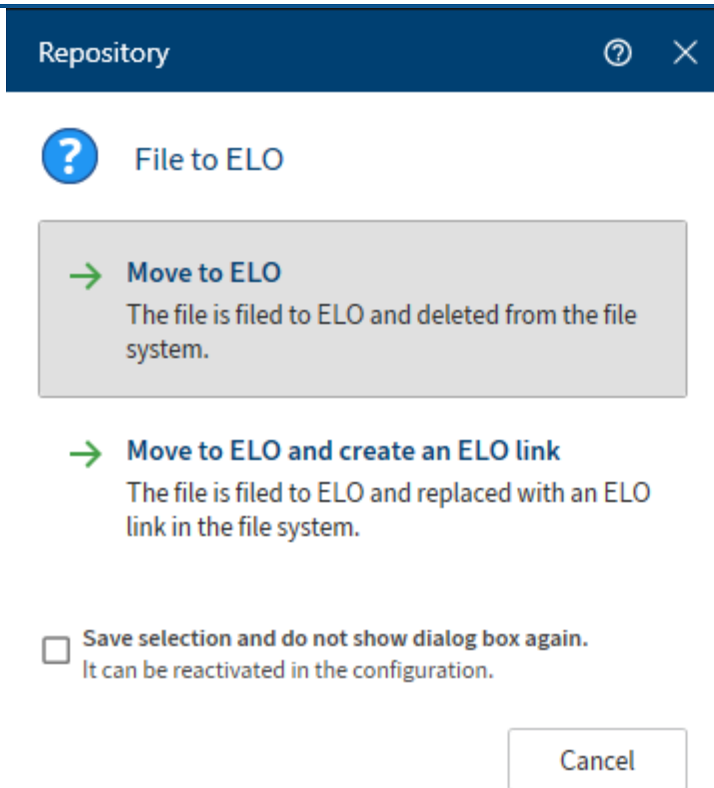
In the *Desktop* work area, ELO recognizes that the document is not filed to the repository.

4. In the *Desktop* work area, select the *File* button (green arrow) to file the selected document to ELO.



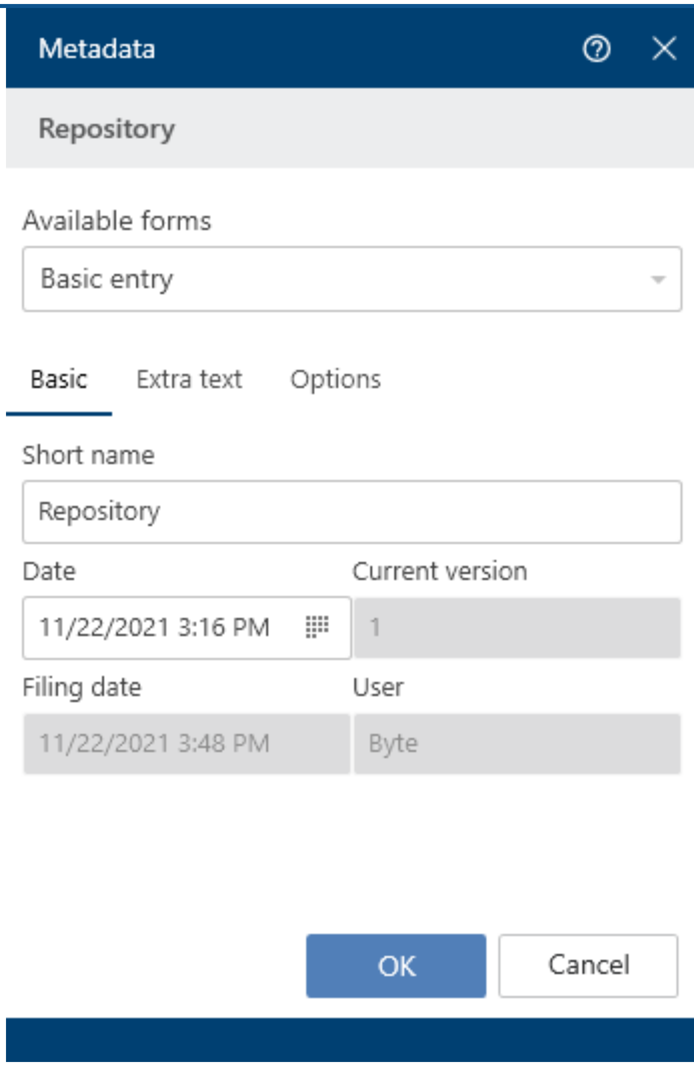
The *Repository* dialog box opens.

5. Select the target folder.
6. Select *OK* to confirm your selection.



An additional *Repository* dialog box opens.

7. Select either *Move to ELO* or *Move to ELO and create an ELO link*.



The *Metadata* dialog box opens.

8. Select a metadata form in the *Available forms* column.

9. Complete the fields in the selected metadata form.

10. Confirm with *OK*.

    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*.

Result

The file is filed to ELO. If you select the *Move to ELO and create an ELO link* option, the file is replaced with an ELO link in the file system.

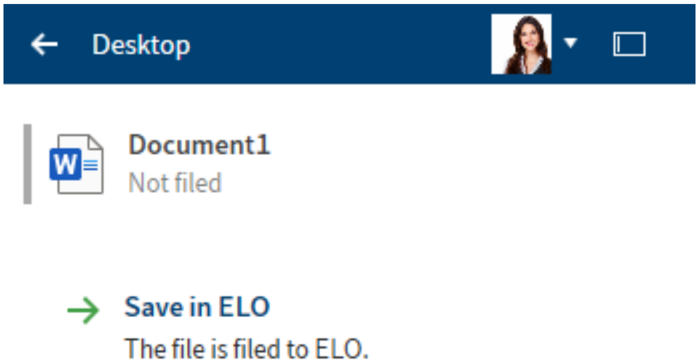
Outlook

You have two options for filing documents in ELO:

•

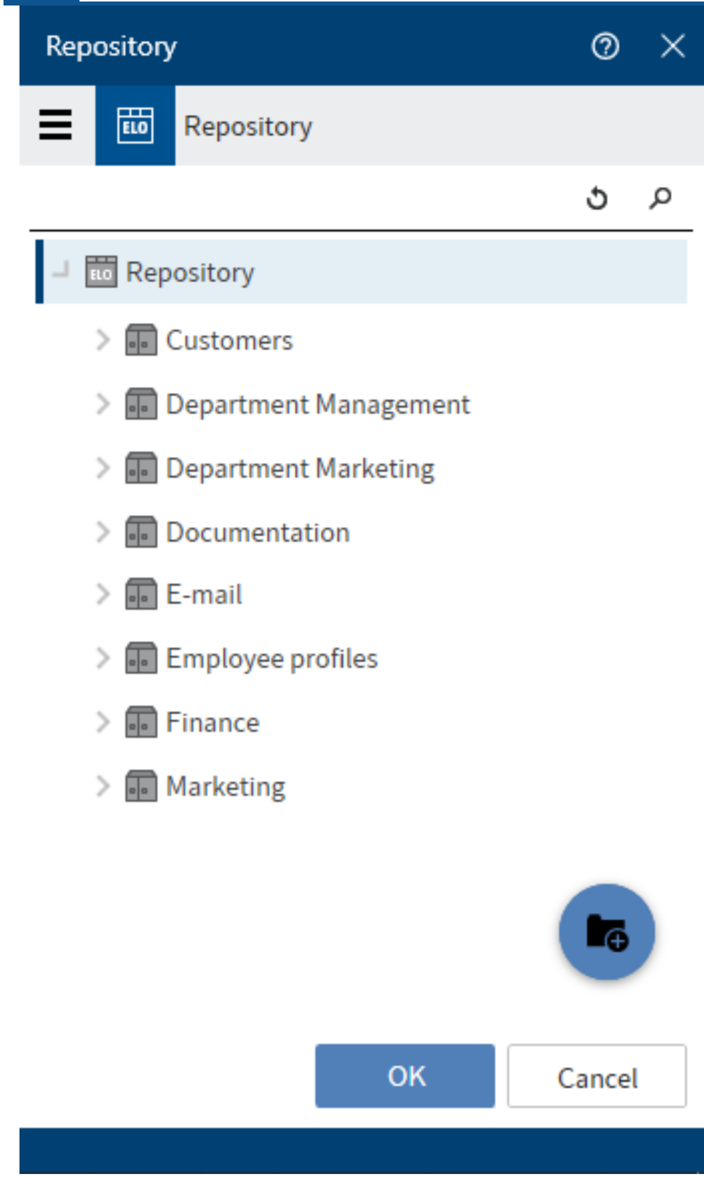
Filing an Office document that hasn't been saved to the file system
- Filing an Office document that has been saved to the file system

Filing an Office document that hasn't been saved to the file system



The example above shows the *Desktop* work area when a Microsoft Office document is opened and not yet saved in the file system.

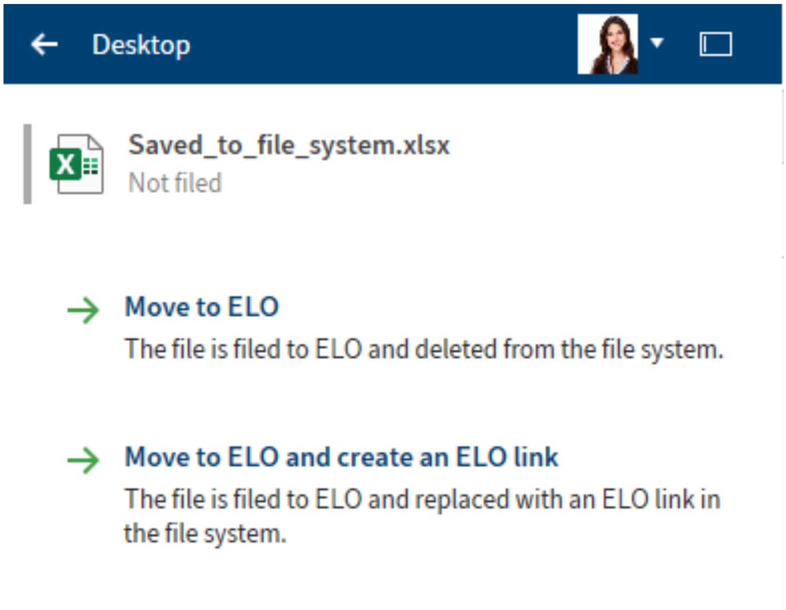
Save in ELO: File the document to ELO. The *Repository* dialog box then opens. Select the target folder here.



Alternative: Create a new folder by selecting the blue plus icon.

After confirming with *OK*, the document is opened in Microsoft Office in read-only mode.

Filing an Office document that has been saved to the file system



The example above shows the *Desktop* work area when a Microsoft Office document is opened and saved in the file system.

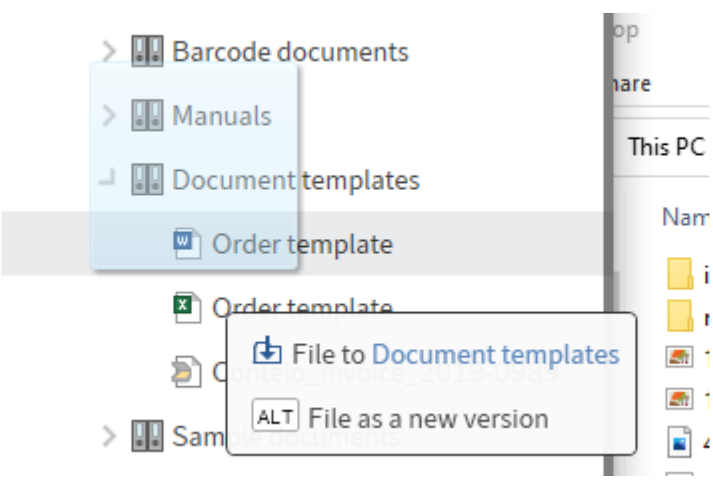
Move to ELO: The document is moved to ELO and deleted from the file system. In the *Select filing folder* dialog box, select the target folder or create a new one.

Move to ELO and create an ELO link: The document is moved to ELO and deleted from the file system. In the file system, the document is replaced with an ELO link to the entry in ELO. In the *Select filing folder* dialog box, select the target folder or create a new one.

Alternative via drag-and-drop

You can also file a document from your file system to ELO using drag-and-drop.

Dragging and dropping items on the tree opens a context menu with the filing functions. User rights are also validated in real time.



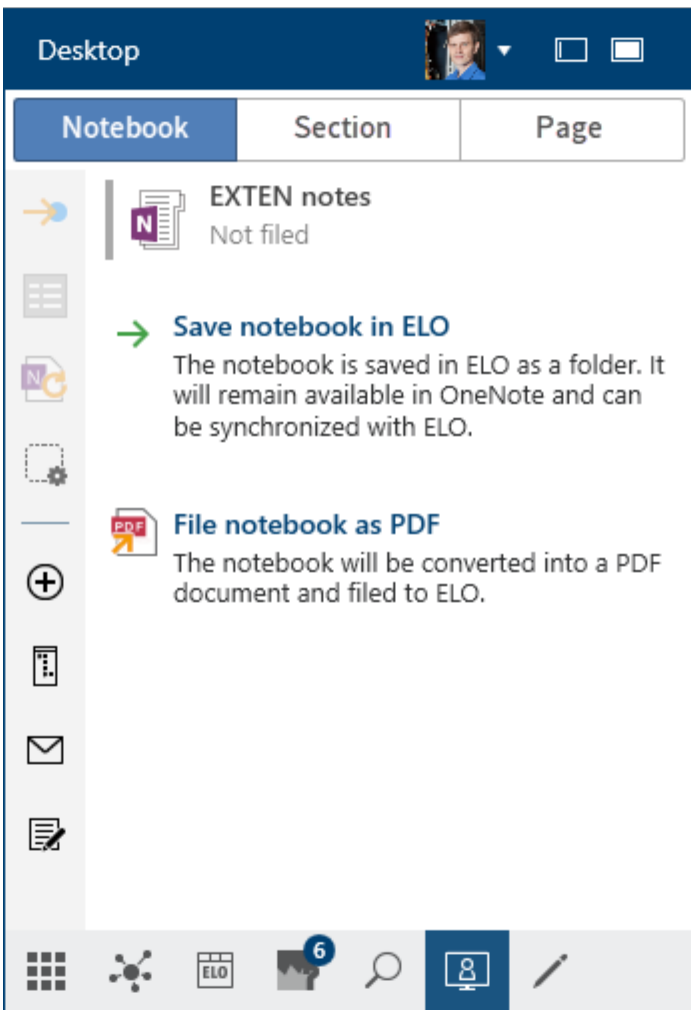
If you press and hold the ALT key, the file is saved as a new version.

File Microsoft OneNote items in ELO

You can file your Microsoft OneNote notebooks to ELO. You can file the entire notebook in ELO, or just individual items, such as sections or pages. You can synchronize changes you make later on. For more information on synchronizing OneNote items, refer to the section Synchronize Microsoft OneNote item.

Method

1. Open Microsoft OneNote with the notebook you want to file to ELO. At the same time, open the *Desktop* work area.



The following options are available:

 - Save notebook in ELO: The notebook is saved in ELO as a folder. It will remain available in OneNote and can be synchronized with ELO.
 - File notebook as PDF

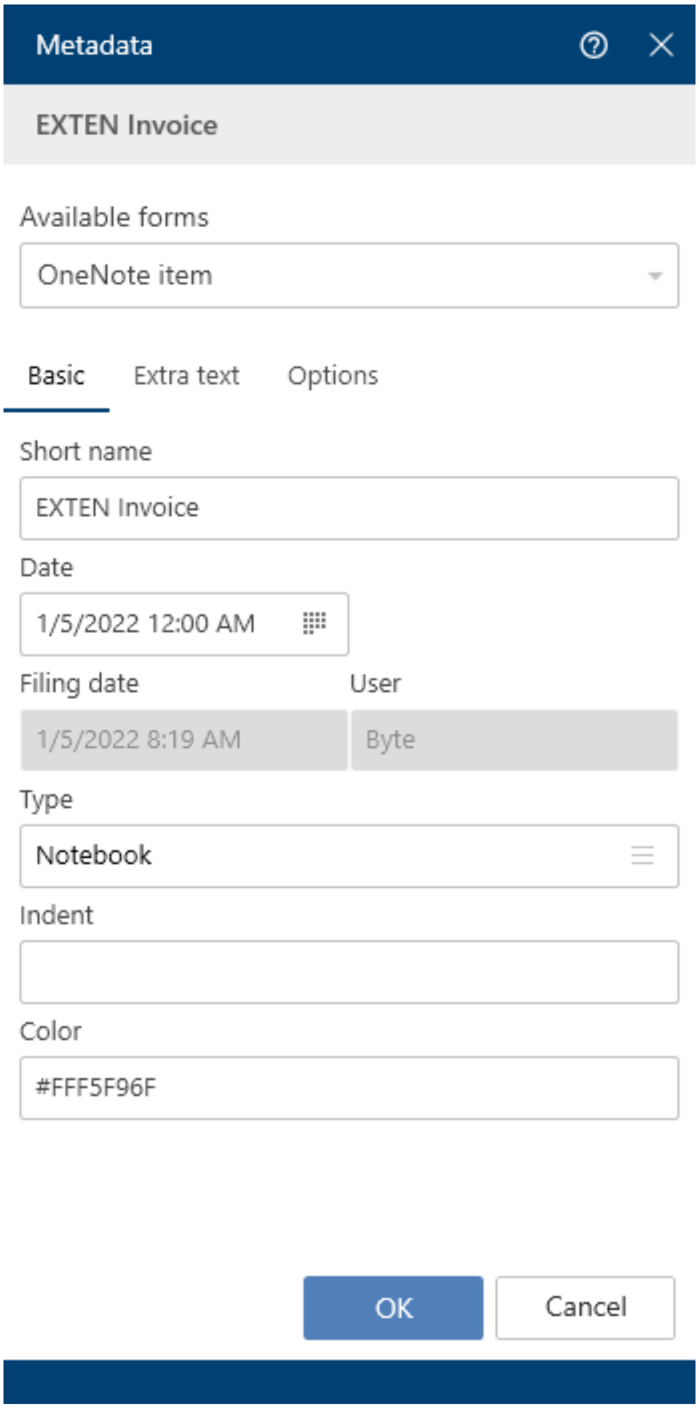
2.

Select the option *Save notebook in ELO*.

The repository structure appears.

3. Select the folder where you want to file the Microsoft OneNote notebook in ELO. Click *OK* to confirm.

Alternative: Create a new folder by selecting the blue plus icon.



The *Metadata* dialog box opens.

4.

Complete the *Metadata* dialog box with the necessary information.

You can select a metadata form in advance via *Configuration > Microsoft OneNote > Metadata*. The preferred form is then completed automatically when filing Microsoft OneNote items.

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

   The *Metadata* dialog box appears for each section and page you've created in the notebook. With pages, the *Version comment* dialog box also appears depending on the settings. In the *Version comment* dialog box, you can enter the version number and relevant comments. This dialog box can be enabled or disabled in *Configuration > Dialog boxes > Version comment*.

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

Result

The notebook is filed to ELO with all its contents.

Information

The automatic sort order in ELO always overwrites the sort order in Microsoft OneNote. This does not apply to section groups. These are always sorted alphabetically in Microsoft OneNote.

Outlook

All Microsoft OneNote items can be filed separately to ELO based on this.

Please note

Entries in ELO that are located in an invalid position for Microsoft OneNote are ignored. This includes a section in another section or a page in a section group, for example.

File e-mails

You can determine how ELO behaves when filing e-mails from Microsoft Outlook in *Configuration > E-mail*.

You can organize how items from Microsoft Outlook (e-mails, calendar entries, tasks) are filed in the *Desktop* work area.

You have the following options for filing e-mails:

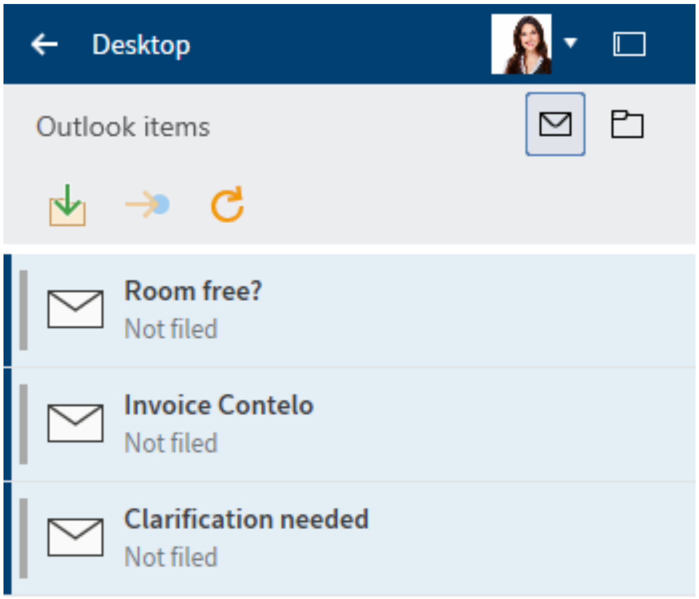
- Manual filing
- Link folder
- Dynamic extension
- Drag-and-drop

Manual filing

Method

1. In Microsoft Outlook, select the e-mails you want to file.

2. At the same time, open the *Desktop* work area.

   In the *Outlook items* area (letter icon) in the *Desktop* work area, the status indicates whether the Outlook items are already filed to ELO.

   Three functions are available:

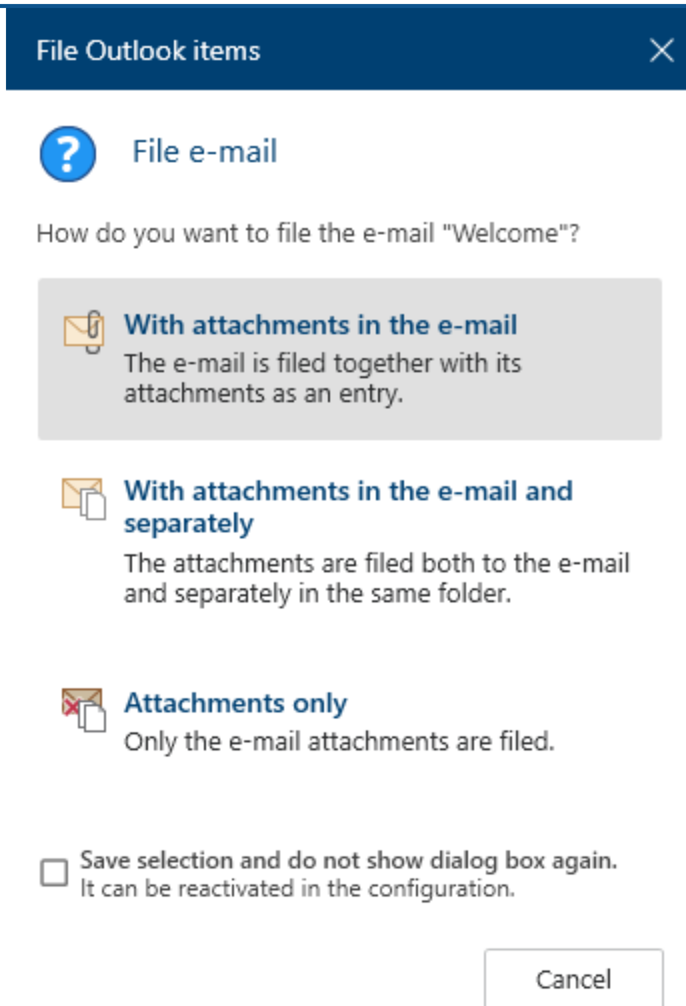
   - Move to ELO: The selected item is filed to ELO based on your configuration.
   - Go to: Goes to the filing location in ELO if the item is filed to ELO.
   - Refresh: Refreshes the current view. The data is refreshed.

3. Select the e-mails you want to file in the *Desktop* work area.

4. Select the *Move to ELO* function.

   The filing structure opens.

5. Select the folder where you want to file the e-mail and confirm with *OK*.



The *File Outlook items* dialog box opens.

Three options are available:

- With attachments in the e-mail
- With attachments in the e-mail and separately: The attachments are filed both to the e-mail and separately in the same folder.
- Attachments only

6. Select one of the options.

   The *Metadata* dialog box opens.

7. Select a metadata form and enter the metadata.

8. Confirm with *OK*.

Result

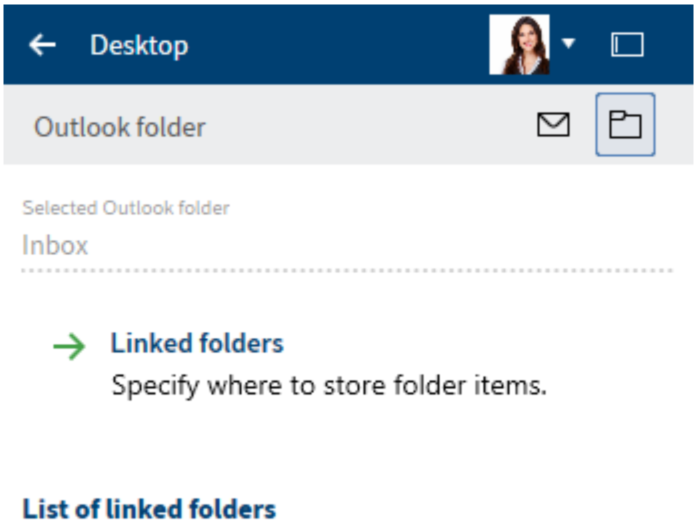
The selected e-mails are filed according to the option selected.

Link folder

We recommend linking the filing of Outlook items with folders in ELO.

Method

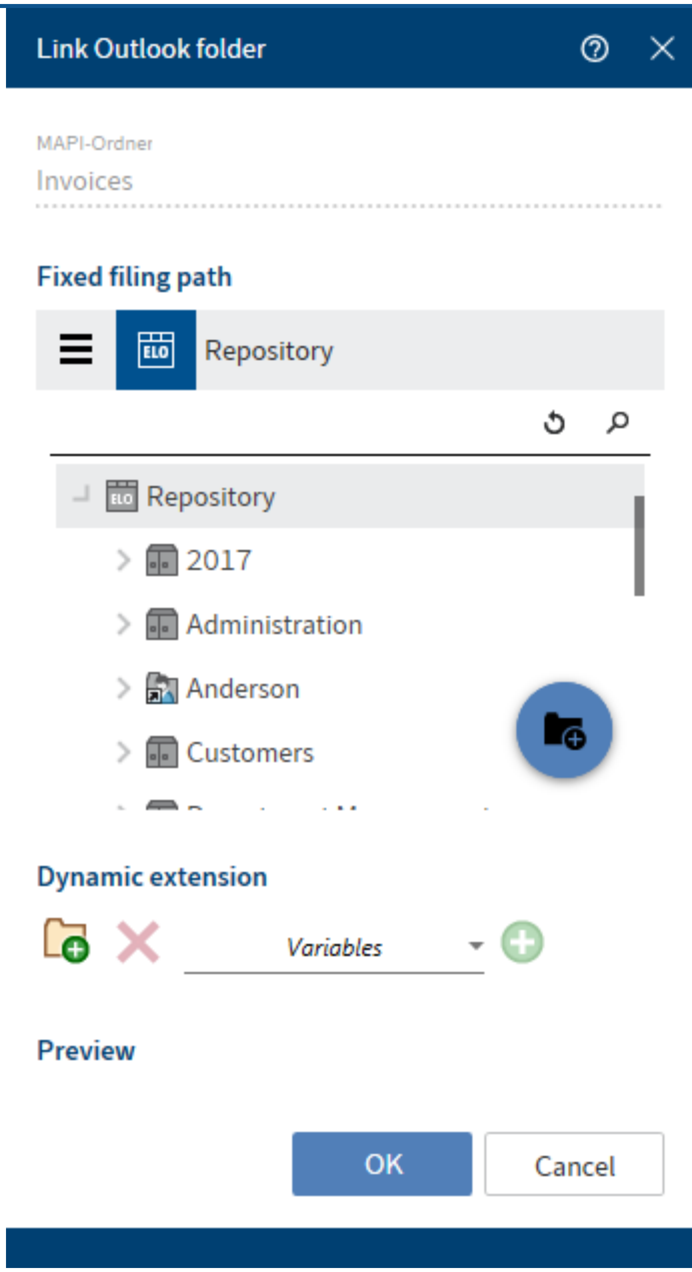
1. Select the folder icon.



The *Outlook folder* area contains the following sections:

   - Selected Outlook folder
   - Linked folders: Determine where folder items are filed to ELO.
   - List of linked folders

2. To create a new link, select *Linked folders*.



The *Link Outlook folder* dialog box opens.

3. Using the search field above the tree view, you can select a fixed filing path in ELO.

4. Select *OK* to save the path you have assigned to the Outlook folder.

Result

You will now see this new link in the *List of linked folders*.

Dynamic extension

This dialog box enables you to define dynamic extensions for the filing path.

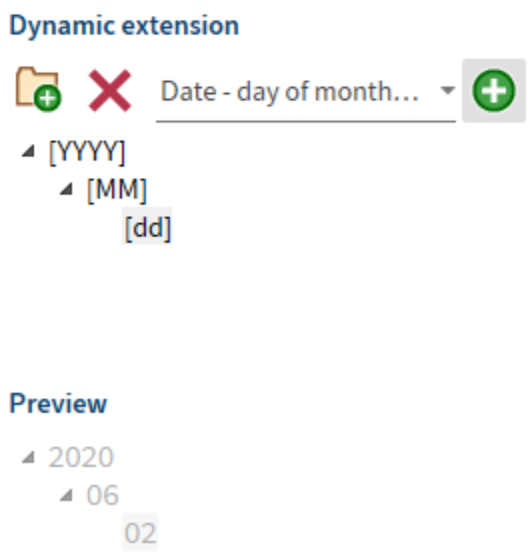
Method

1.

Select *New folder level* (folder icon with green plus icon) to create a new folder level.

Optional: Select *Delete folder level* (X icon) to delete any folder levels that you have accidentally created.

2. Select a variable. You can select from ten variables in the drop-down menu.
3. Select the green plus icon to add variables for the folder level.



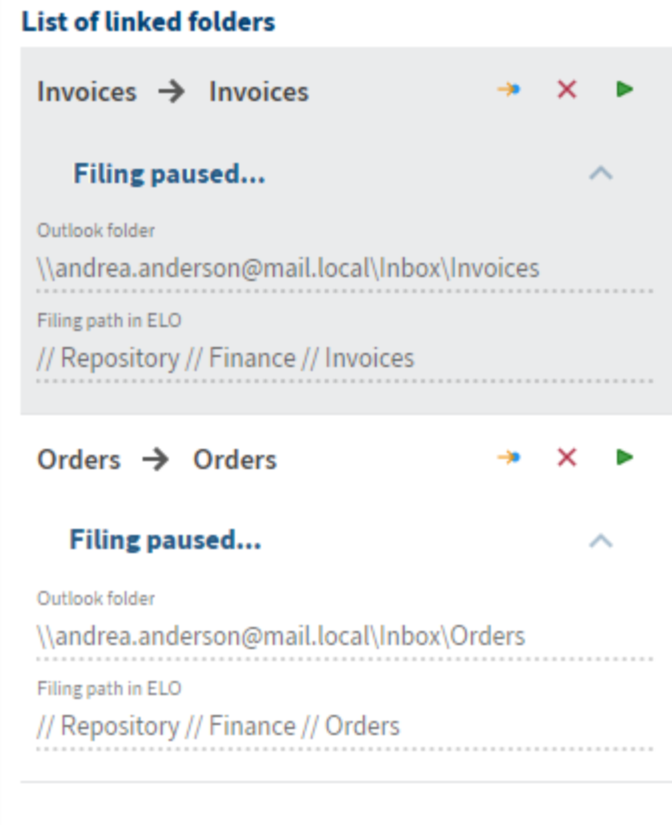
4. Repeat this process until you have defined all folder levels.

   The preview shows how the dynamic extension would look with the defined variables.

5. Select *OK* to save the dynamic extension.

Result

The folder link is defined and appears in the list of linked folders.



In the list of linked folders, you have the following options:

- Go to (yellow arrow icon): Navigate to the filing path in ELO.
- Delete (X icon): Remove the link from the list.
- Start filing (green arrow icon): The items from the Outlook folder are filed to ELO and a child folder structure is created for filing e-mails.

The status is *Filing paused* before initial filing. Under this, you will see the path to the linked Outlook folder and the filing path in ELO.

After starting filing, the status changes to *Filing ended/stopped*.

The log under this indicates which steps have been performed.

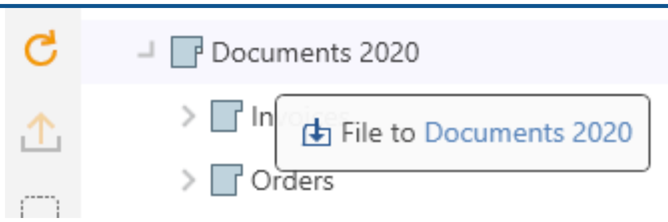
File e-mails from Microsoft Outlook folders via drag-and-drop

You can move the e-mails you've organized in Microsoft Outlook folders to your repository via drag-and-drop. Not each individual e-mail has to be moved separately. Instead, all e-mails in a Microsoft Outlook folder can be moved together.

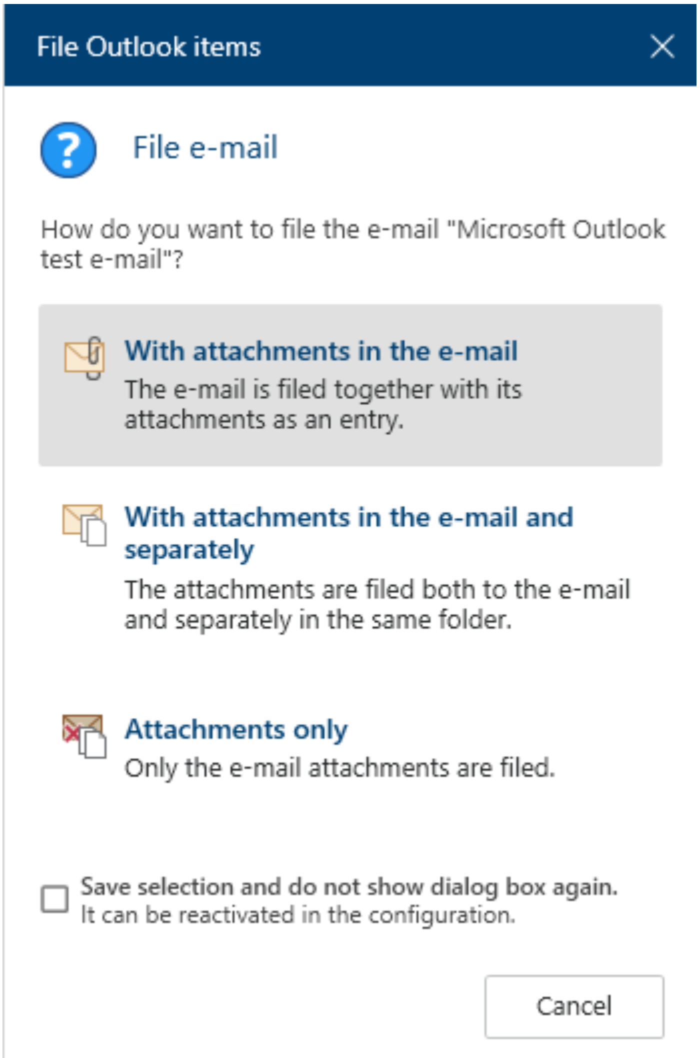
Method

1. Open the *Repository* work area and navigate to the folder where you want to file the e-mails.

2. Click the folder in Microsoft Outlook that you want to file and drag it to the folder where you want to file the e-mails.



The *File Outlook items* dialog box opens.



Three options are available:

- With attachments in the e-mail
- With attachments in the e-mail and separately: The attachments are filed both to the e-mail and separately in the same folder.
- Attachments only

3. Select one of the options.

   The *Metadata* dialog box opens.

4.

Select a metadata form and enter the metadata.

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

Result

The e-mails from the Microsoft Outlook folder are filed based on the selected functions.

Manage e-mails

ELO helps you manage e-mails. You have the following options for working with e-mails in ELO:

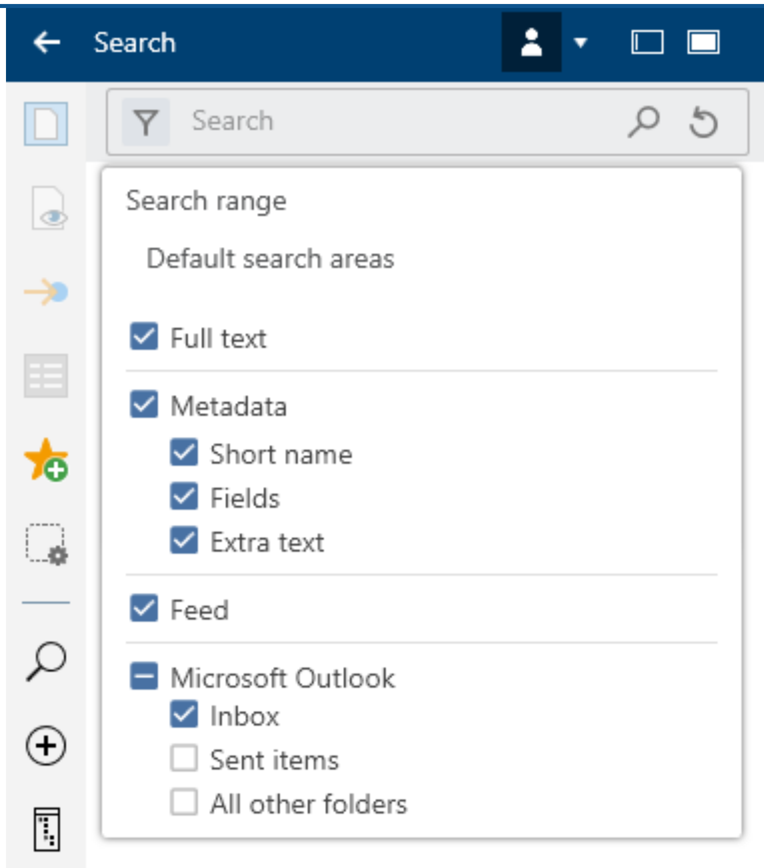
- Perform a combined search in ELO and Microsoft Outlook.
- You can reply to or forward e-mails in ELO.
- File e-mails to ELO from Microsoft Outlook.

Combined search in ELO and Microsoft Outlook

ELO features a combined search for e-mails in the ELO repository and Microsoft Outlook.

Method

1. Open the *Search* work area.
2. Open the *Search options* (filter icon).
3. Select the *search range*.



To be able to search for entries in ELO and Microsoft Outlook, the box next to *Microsoft Outlook* and at least one other option (*Full text*, *Metadata*, *Feed*) must be checked.

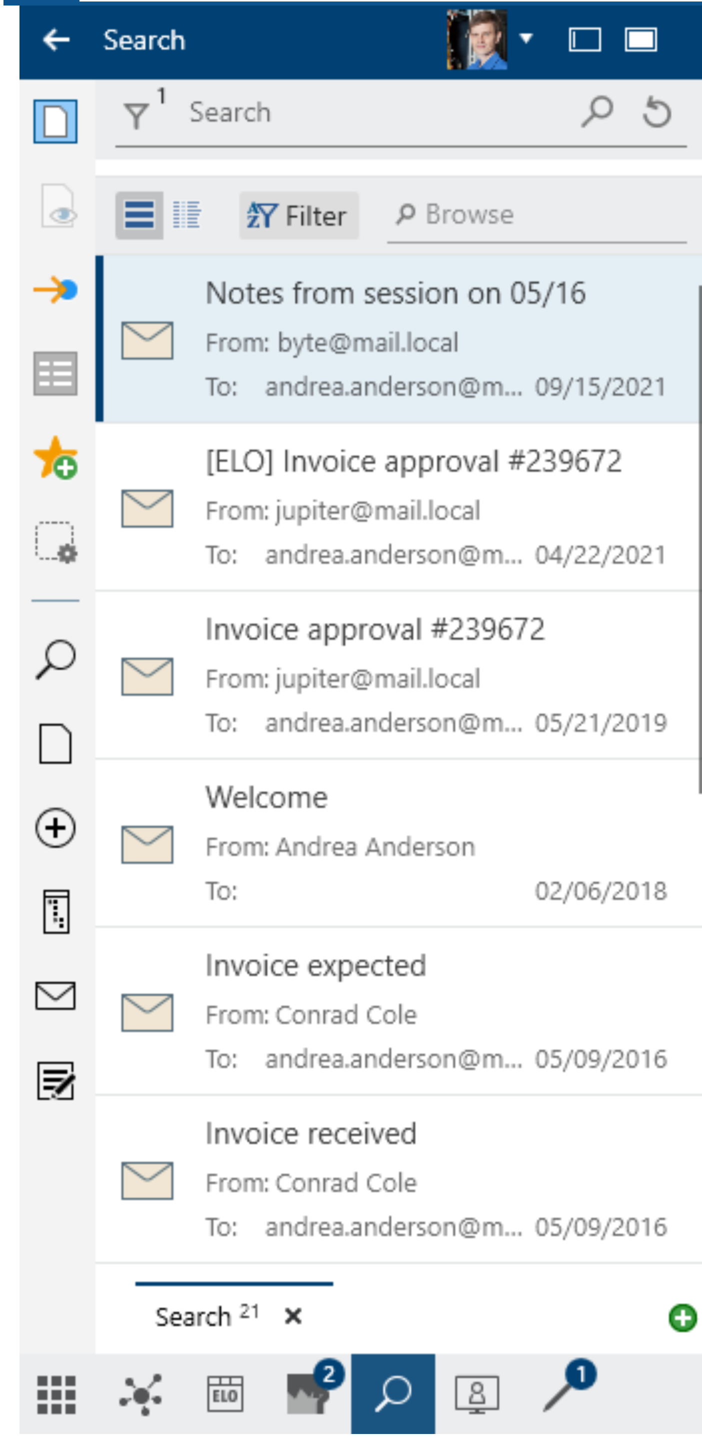
4. To only search for e-mails, set the *Entry type* filter to *E-mail*.

5. Select *Perform search* (magnifying glass icon).

   Keyboard shortcut: ENTER key

Result

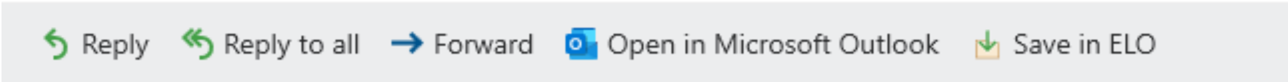
The search results are displayed.



All entries marked with the Microsoft Outlook symbol are search results from Microsoft Outlook. Entries without this icon are entries filed to ELO.

Reply to and forward e-mails

You can reply to e-mails right in ELO without opening Microsoft Outlook by opening an e-mail with the *Preview* function. The e-mail can already be filed to ELO or be found using the combined ELO and Microsoft Outlook search.



These functions connect ELO to Microsoft Outlook:

- Reply, Reply to all, Forward: You are familiar with these functions from Microsoft Outlook. A Microsoft Outlook window for replying to the e-mail opens and you can process your e-mail as usual.
- Open in Microsoft Outlook: You open the e-mail in Microsoft Outlook and can process it as usual.
- Save in ELO

Filing e-mails from Microsoft Outlook

You can organize how items from Microsoft Outlook (e-mails, calendar entries, tasks) are filed in the *Desktop* work area.

You can move the e-mails you've organized in Microsoft Outlook folders to ELO together.

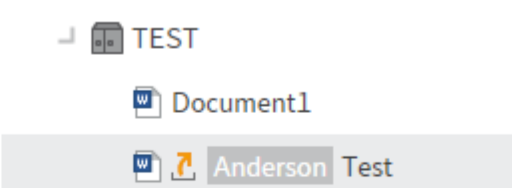
Refer to the Filing e-mails section to learn how to file Microsoft Outlook items in ELO.

Check out and edit document

With the *Check out and edit* function, you can open a selected document in an external program for editing. Once you have finished editing the document, check it back in (refer to the Check in document section for more information). A new version of the document is created, which becomes the new working version. The working version is always the version that you see when you select the document.

The old version is still retained.

While the document is checked out, it is locked for other users. During this time, other users can only view the document in read-only mode (*Document* > *Open in read-only mode*). This prevents multiple users from being able to make changes to a document at the same time.



You can recognize checked out documents by a yellow arrow next to the document icon. Next to this you will see the user currently editing the entry.

Related function

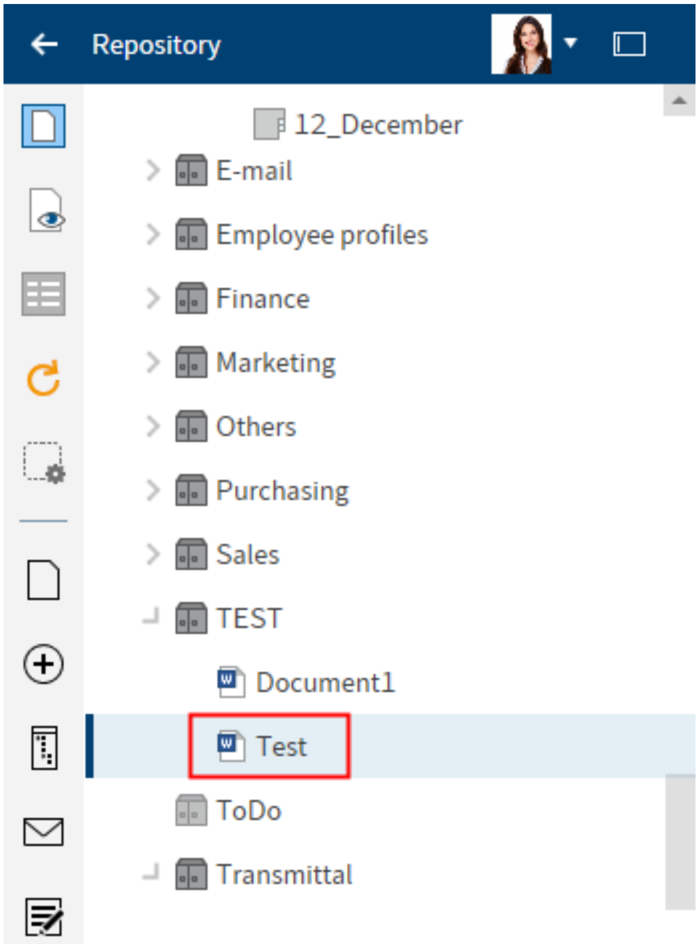
- Check out to OneDrive: Use this function to check out a Microsoft Office document in ELO to Microsoft OneDrive for editing.

Method

1. Open the *Repository* work area.

2. Open the folder with the document that you would like to edit.

3. Select the document.



4. To edit the document, select *Document > Check out and edit* on the toolbar.

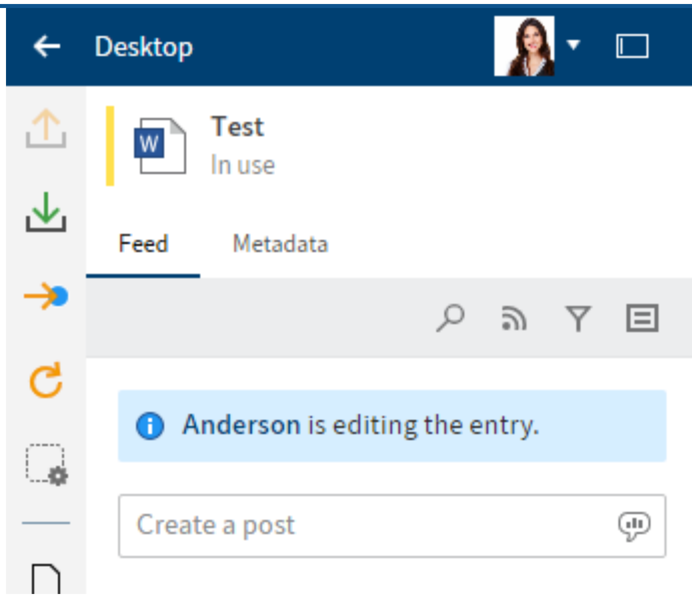
   Keyboard shortcut: ALT + O

   The document is opened for editing in an external program. It is transferred to the *In use* work area and cannot be edited by other users.

   Information

   If you close the document in the external application, it is still checked out.

   To cancel, still select *Close*. In the *In use* work area, select the document. On the toolbar, select *Document group > Discard document changes*.



In the *Desktop* work area, you will see that the document is in use.

5. Edit the document.

6. Save the document in the external application.

You do not have to check the document back in right away. You can keep it checked out and edit it later. Use the *Edit document* function for this.

In addition to the *Repository* work area, you will also conveniently find the document in your *In use* work area as long as you have it checked out.

Result

The document is changed locally but not in ELO.

Outlook

To apply your changes to ELO and save your document as a new version, use the Check in function.

Discard document changes: If you want to discard the changes, use this function.

Check in document

The *Check in* function files a checked out, changed document to ELO as a new version.

Related function

- Discard document changes: If you want to discard the changes, use this function.

Method

1. Select a checked out document in ELO.

2.

To transfer the document back to the repository, select *Document > Check in* on the toolbar.

Keyboard shortcut: ALT + I

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. Select *OK*.

Result

The document is filed as a new version in ELO. The document is removed from the *In use* work area and can be edited again.

Outlook

To learn how to revert to an older version, refer to the Document versions chapter.

Narrow down a search request

Available in: *Search* work area

You can search for documents and folders. The more information you enter about the entry you are looking for, the better the result will be.

This section describes an example of a search. You will find descriptions of the interface and all search options in the chapters 'Search' work area and 'Search' group.

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

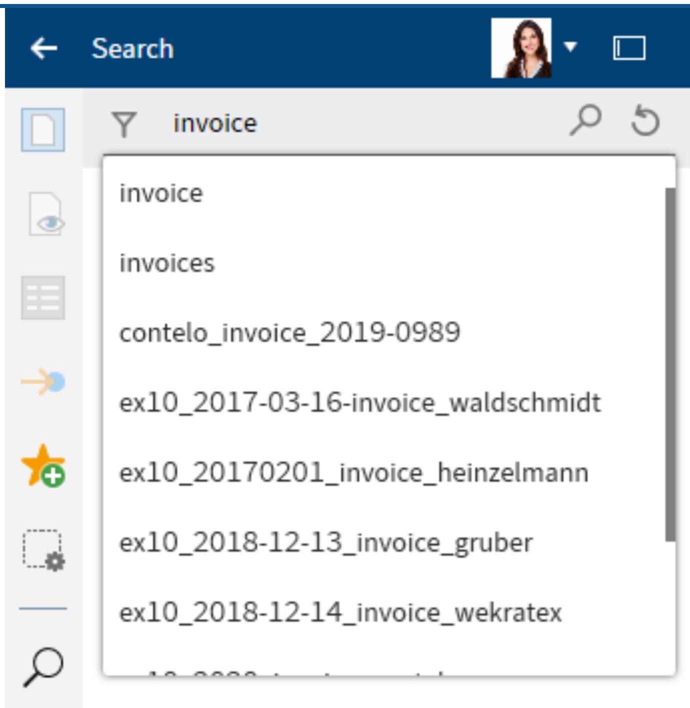
Example

You want to search for a document. You know

- that it is an invoice,
- that it was filed as a PDF or Word document,
- that the document was filed within a specific period,
- the order number,
- that it was not filed with the *E-mail* metadata form.

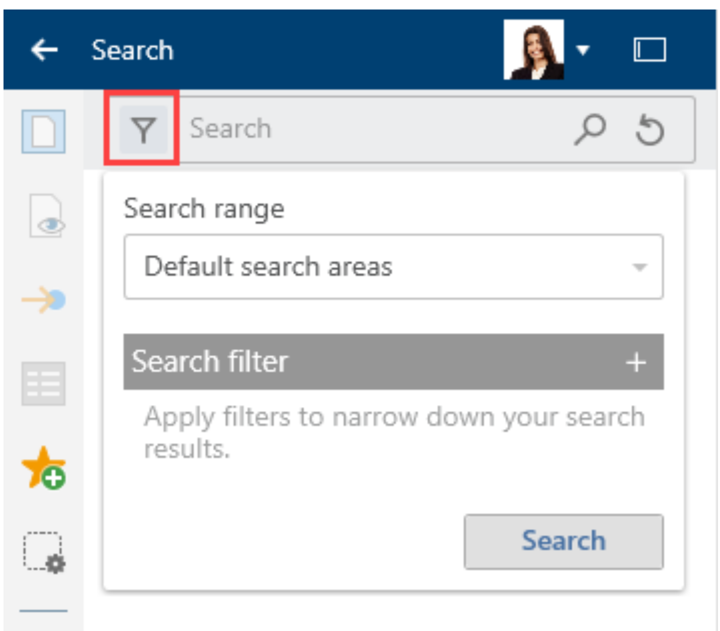
Method

1. Enter the search term *Invoice* in the search field to run a search with ELO iSearch.



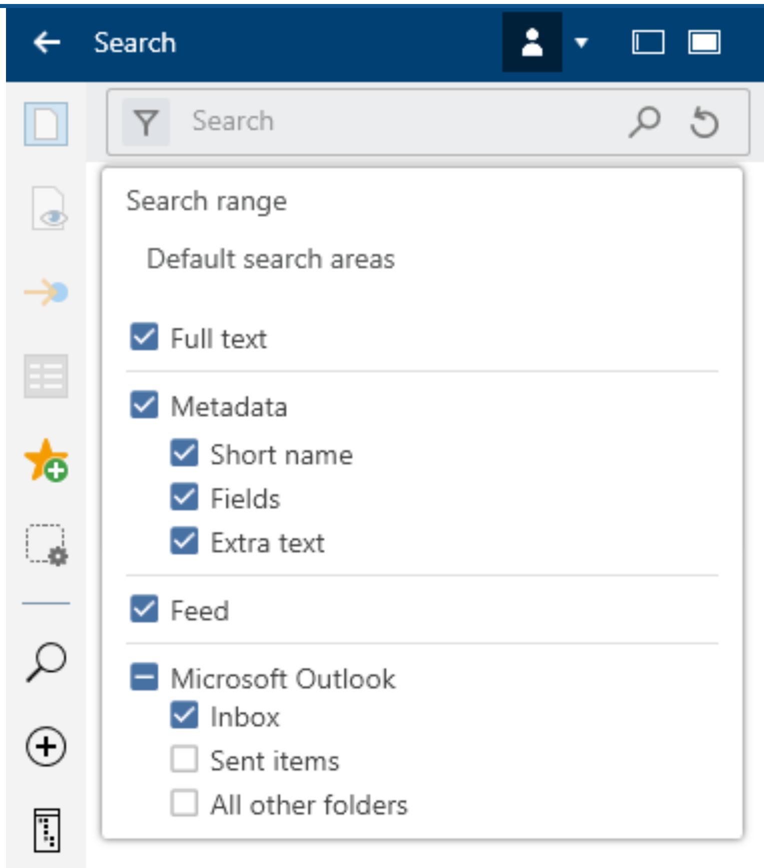
While entering a search term, the *search-as-you-type* function provides search suggestions in a drop-down menu.

2. Select *Search options* (filter icon) to show the search options.



The search options open.

3. Select the *Search range* field.



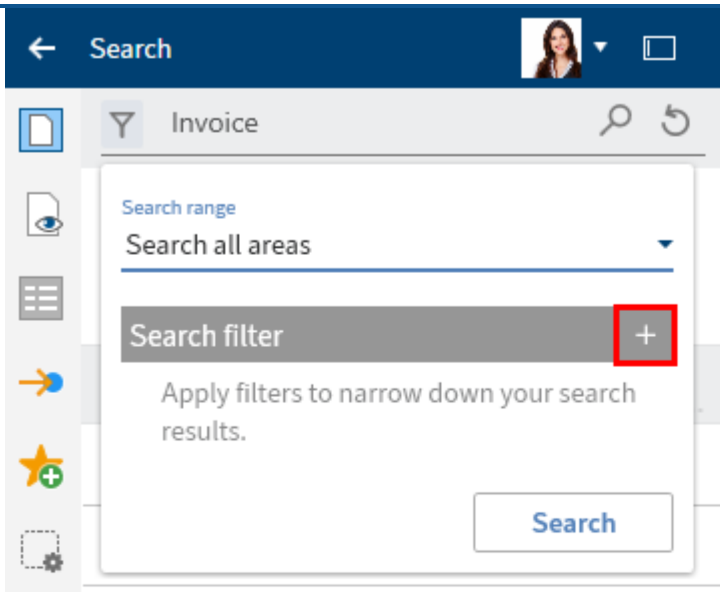
The search range drop-down menu opens. This field is set to "Search all areas" by default.

4. Uncheck *Microsoft Outlook* to limit your search to the ELO repository.

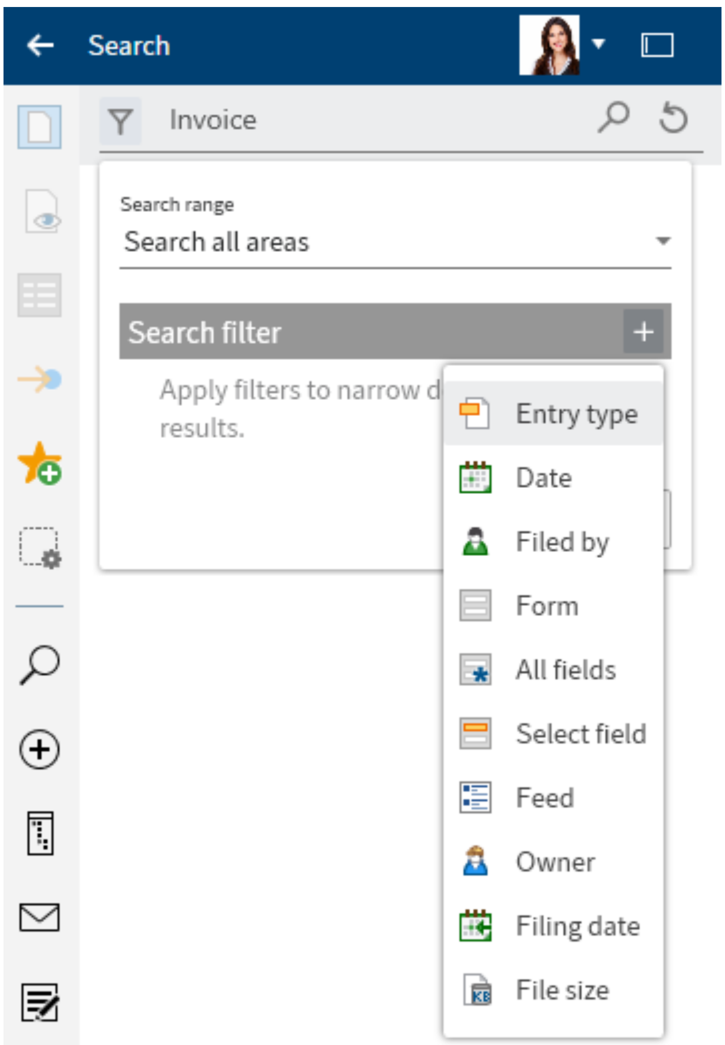
   Refer to the Manage e-mails section to learn how to perform a combined search in ELO and Microsoft Outlook.

   Click the *Search range* field again to close the *Search range* field.

5. Apply search filters to narrow down your search results.

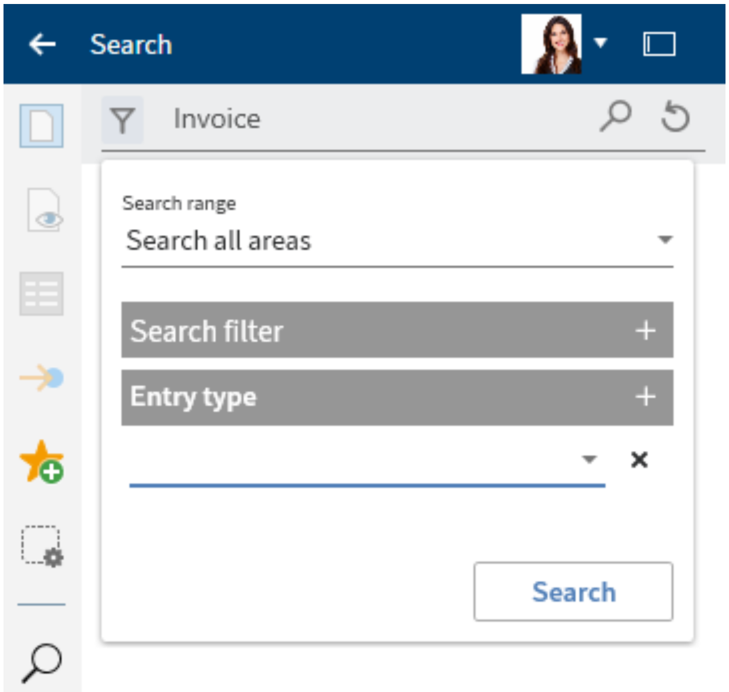


6. Select *Add* (plus icon) to apply a search filter.



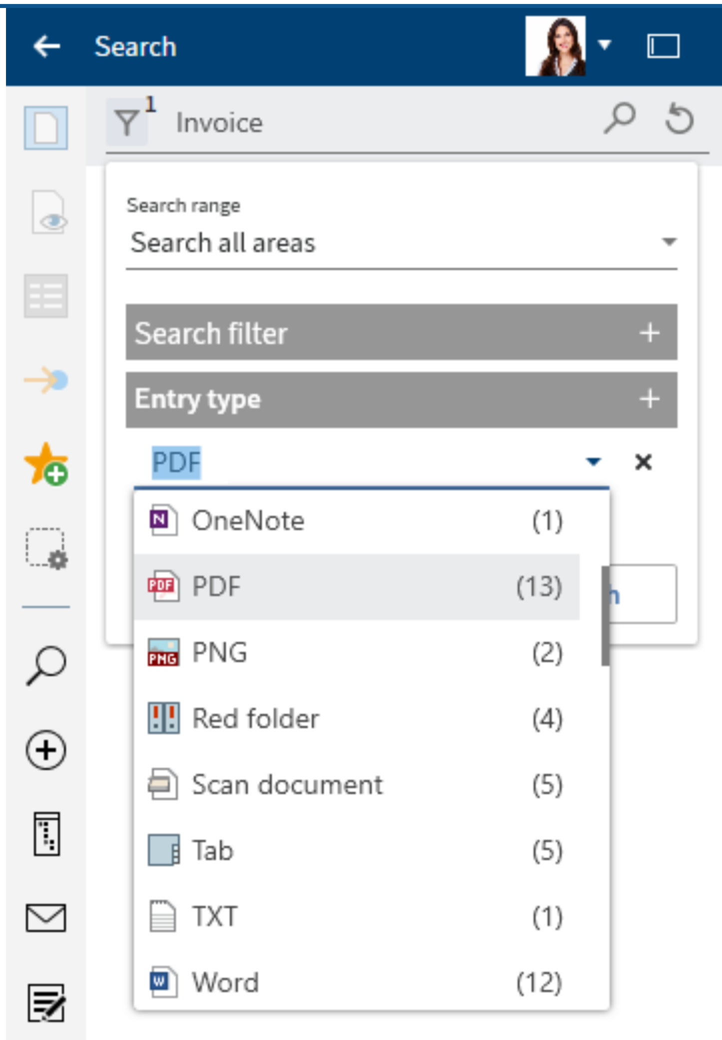
A drop-down menu with available search filters appears.

7. Select the *Entry type* search filter from the drop-down menu.



The *Entry type* search filter appears.

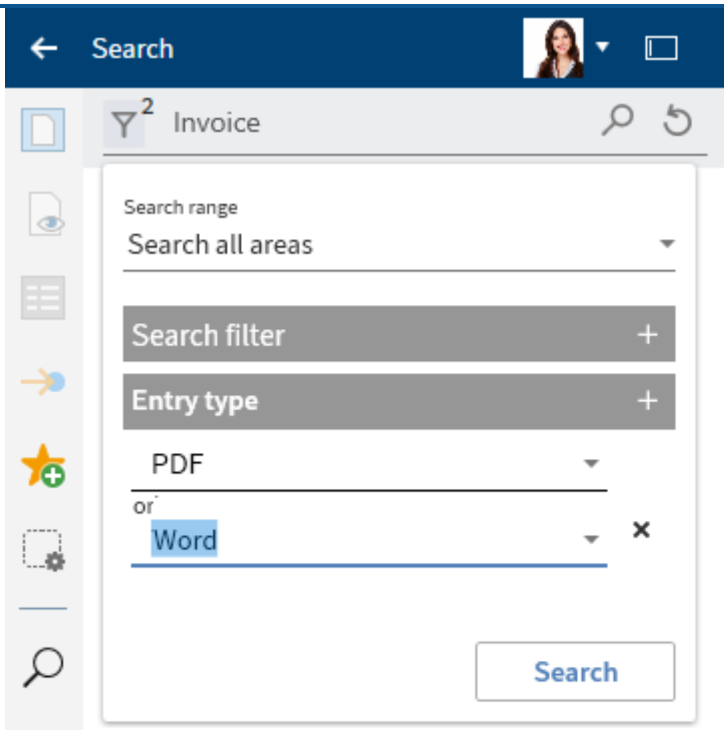
8. Select the value *PDF* from the drop-down menu.



Optional: To remove a filter, select the delete icon (X).

> **Information**
>
> The number of entries in ELO is shown in parentheses for each individual value.

9. Select *Add* (plus icon) again to apply an additional search filter.
10. Select the value *Word* from the drop-down menu.

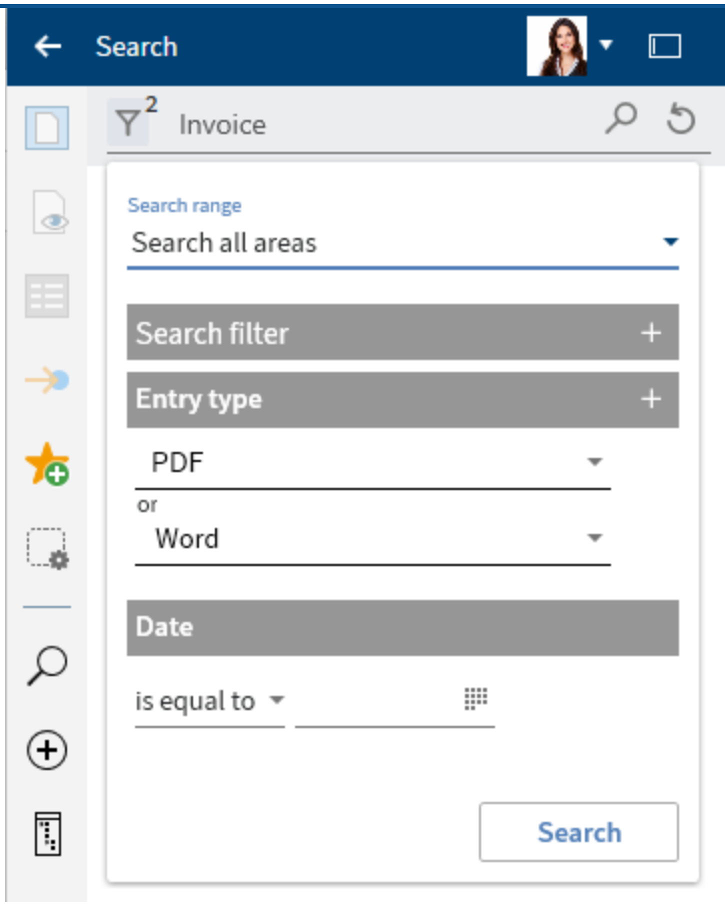


The second value from the drop-down menu is applied.

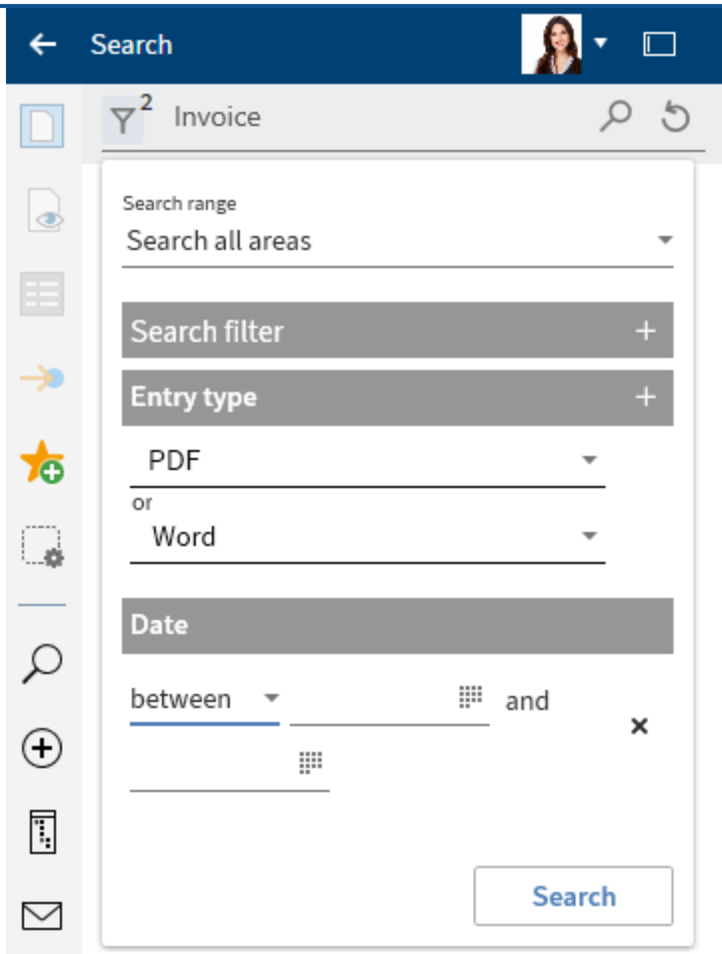
Information

The following search filters work in the same way: *Filed by*, *Form*, *Feed*, and *File size*.

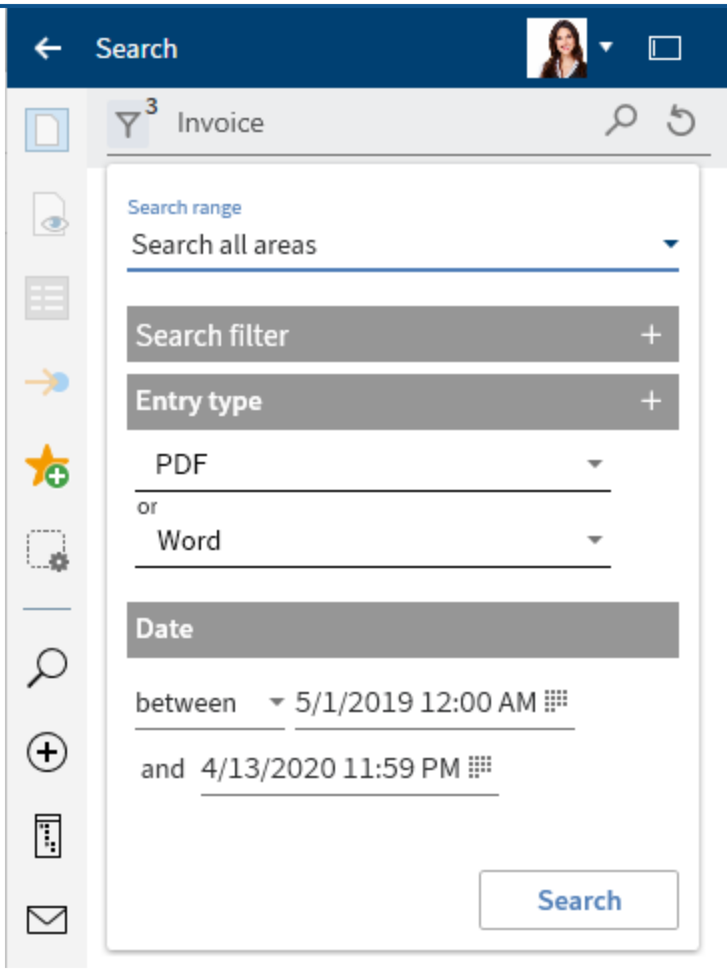
11. Add the *Date* filter.



12. Select the option *between* from the drop-down menu.



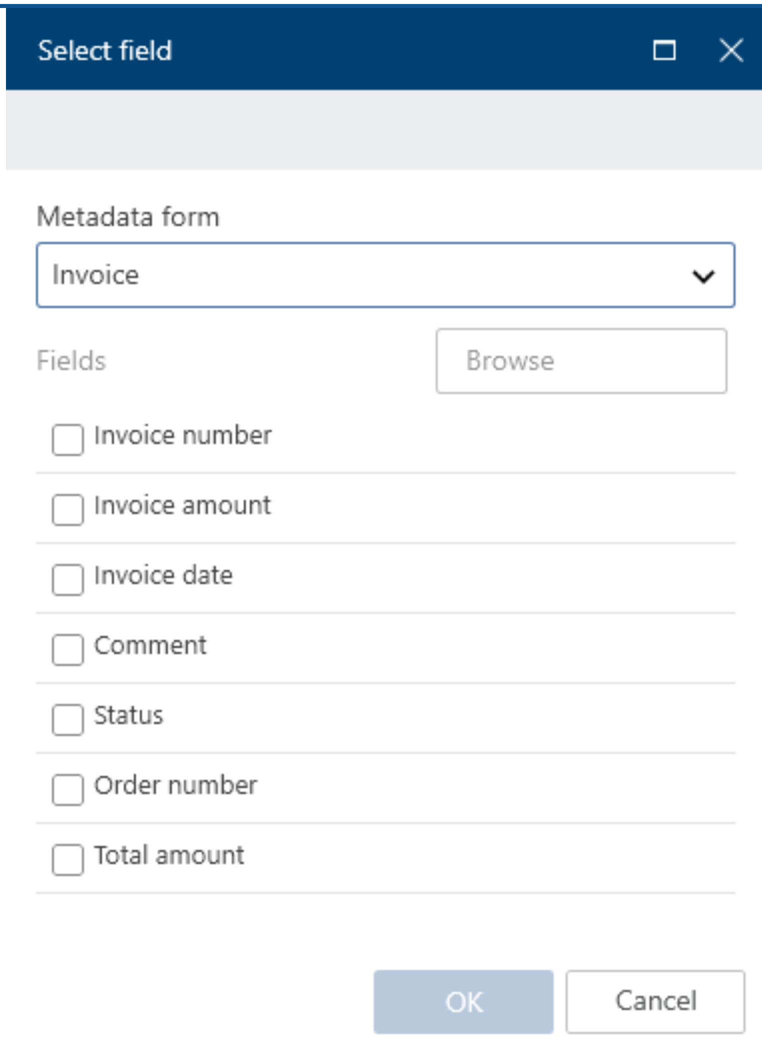
13. Select the calendar icon to set a custom period. In the calendars, select the dates.



Information

The *Filing date* search filter works in the same way.

14. Apply the *Select field* search filter.

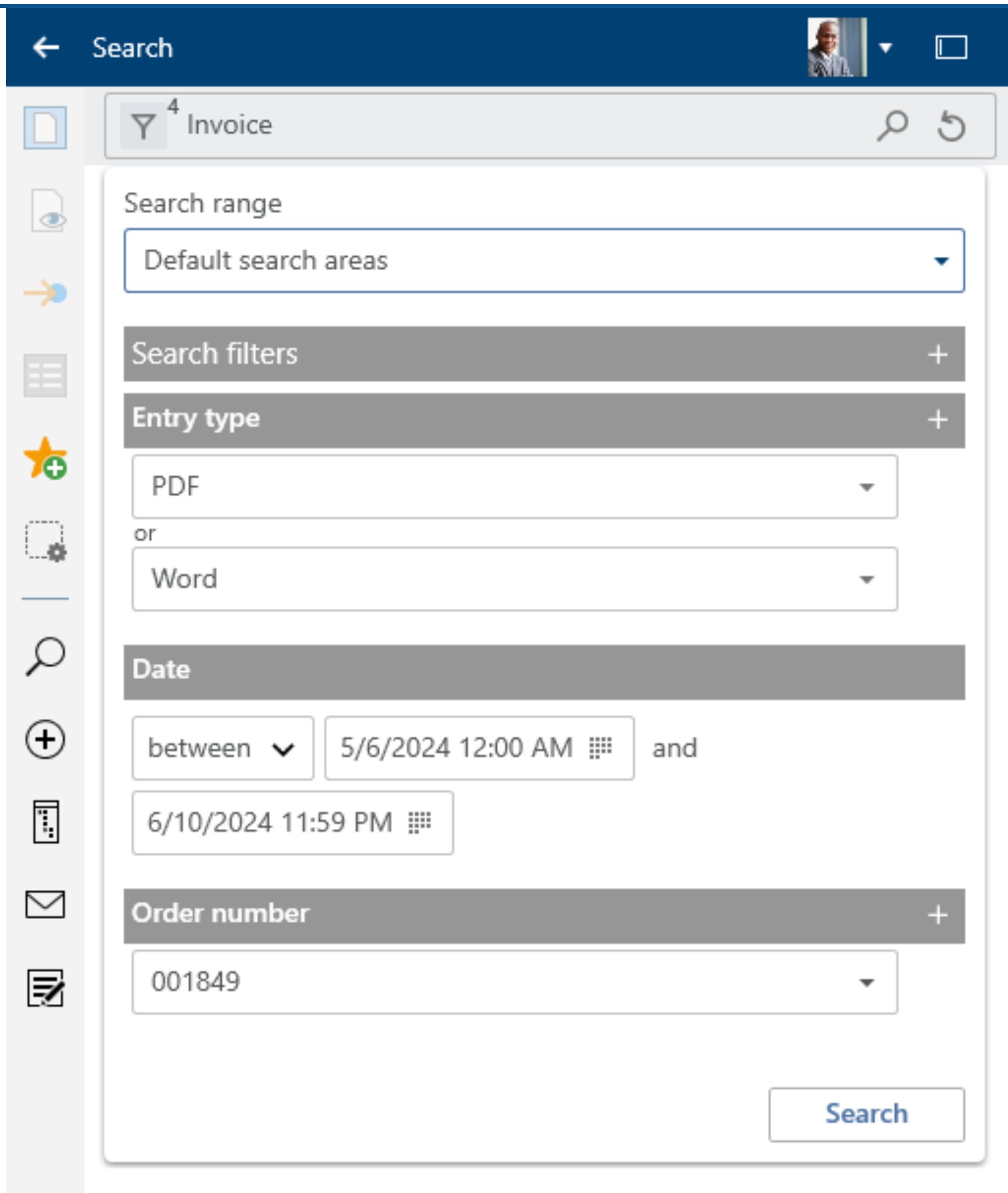


15. In the *Select field* dialog box, select the *Invoice* metadata form from the drop-down menu in the *Metadata form* field.

16. Check the box next to the *Order number* field and select *OK*.

    The *Select field* search filter is applied.

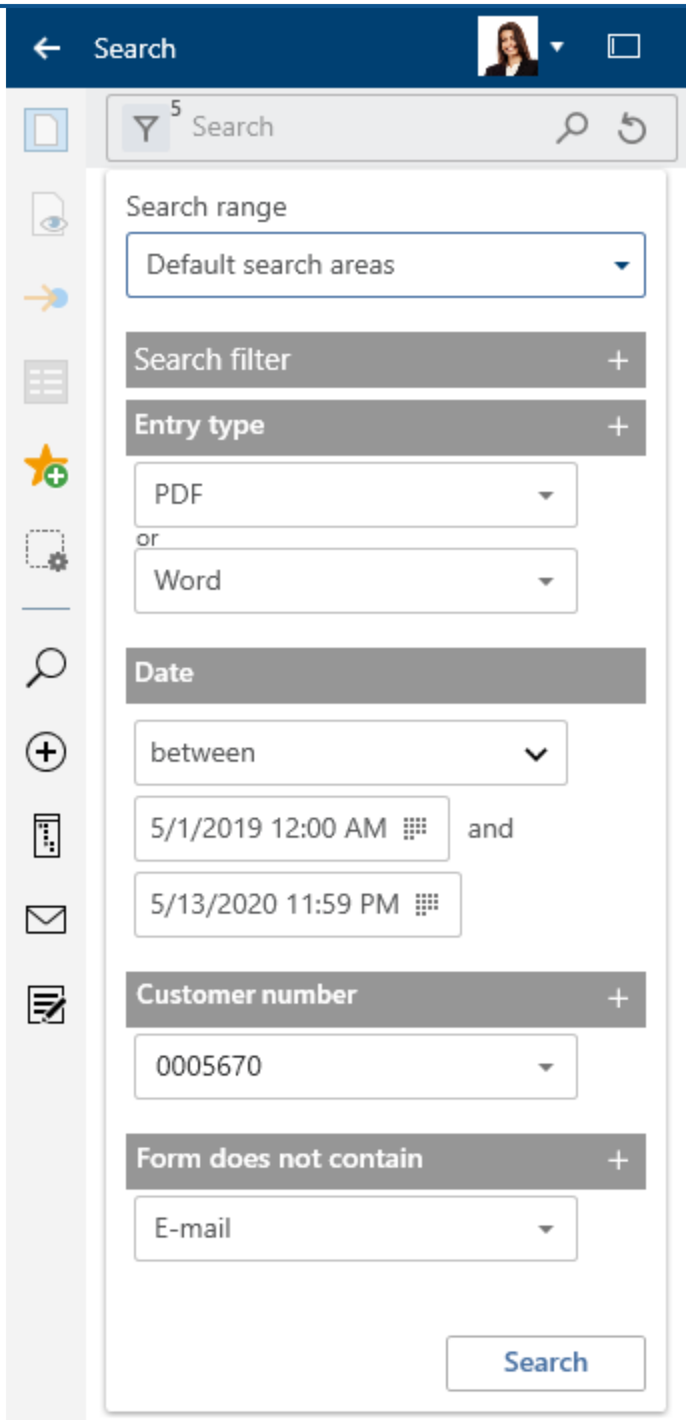
17. Select the order number from the drop-down menu.



18. Select the *Form* search filter with the value *E-mail*.

19. Right-click on the *Form* search filter.

20. Click on *does not contain*. This negates the filter.



21. Select the magnifying glass icon to start the search.

    Keyboard shortcut: ENTER key

Result

This example narrowing down the search with search ranges and search filters is complete.

The results are shown after you enter your search. You can choose between a table view and list view.

Information

The number shown next to the *Search options* button before the input field indicates how many search filters are active.

Outlook

In the *Search* work area, you can use the same functions on entries as in the *Repository* work area, for example edit documents or send entries.

To go to the filing location of the entry, select the entry. On the toolbar, select *View > Go to* or use the keyboard shortcut CTRL+ G.

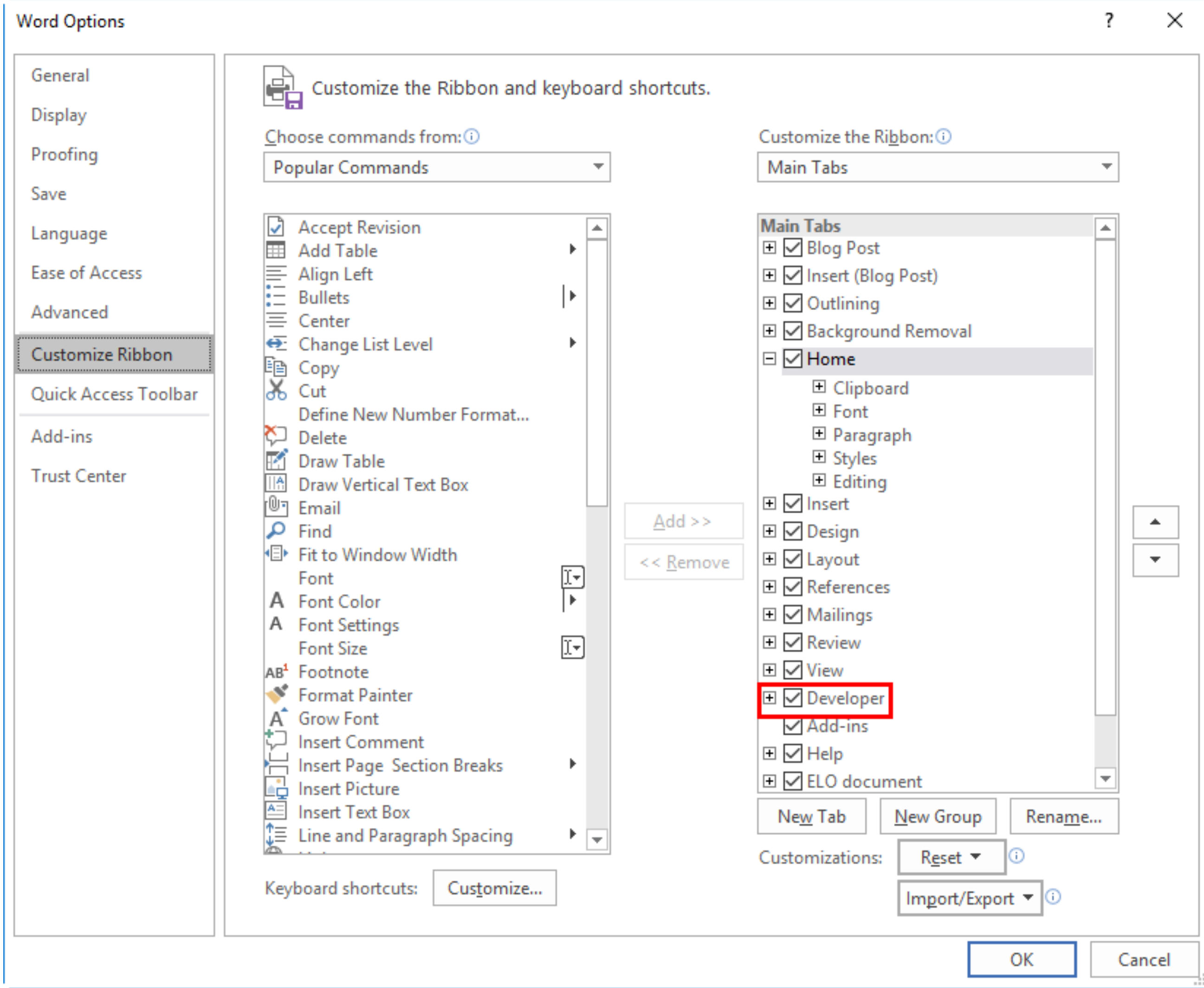
You can set the defined search as a search favorite. The Add search favorite section explains how to save a search.

To view an entry in the results list, use the Preview function.

Assign control

You can assign controls from a form in a Microsoft Office template to a field in the ELO metadata.

To do so, you need to enable the *Developer* tab in Microsoft Word: *Ribbon* > *File* > *Options* > *Customize Ribbon*.



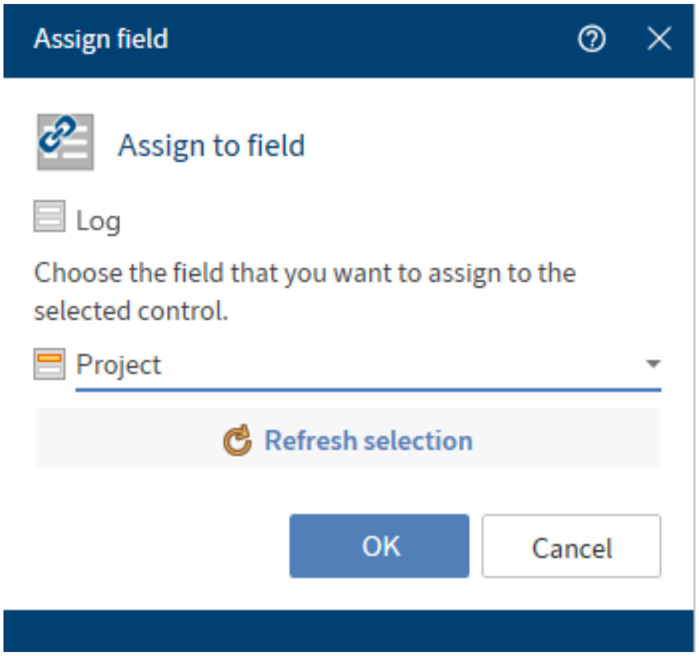
To connect the content of the metadata to the Word form fields, in *Metadata > General* in the configuration, check the box next to *Link the content of the controls from Word to the metadata*.

Method

1. Create multiple controls in a document template in Microsoft Word, for example a content control for selecting the date or a drop-down list content control for the project name.
2. File the document to ELO and choose the metadata form with the fields you want to link to controls later on. In our example, we select the *Report* metadata form with the fields *Project*, *Meeting date*, *Location*, and *Topic*.
3. Select the filed document in ELO, then select *Document > Check out and edit* on the toolbar.

   The document is opened for editing in Microsoft Word.
4. Switch to the *Desktop* work area.
5. In the Word template, select the control you want to assign to a field in the metadata form.

6. On the toolbar, select *Organize > Assign control*.



The *Assign field* dialog box opens with the name of the metadata form.

7. Choose the field that you want to assign to the selected control from the drop-down menu. In our example, we select the *Project* field.

   Optional: Selecting *Refresh selection* refreshes the selection in Microsoft Word if you have made any changes in the meantime.

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

   The control has been assigned to a field.

9. Repeat this step for the other controls in your document template.

   Optional: On the toolbar, select *Organize > Overview of controls* to check which fields are linked.

Result

The controls are now linked to fields in the ELO metadata.

Outlook

You can now create a report with the document template by pressing the Document from template button. When opening the document template, the *Metadata* dialog box opens. All information provided within the mapped fields is automatically transferred to the document's form fields.

Once the document has been created and checked back in, the values of the mapped fields are automatically checked and the content of the metadata form automatically adjusted.

User menu [your name]

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.

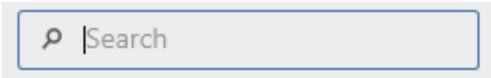
Configuration – top area

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.

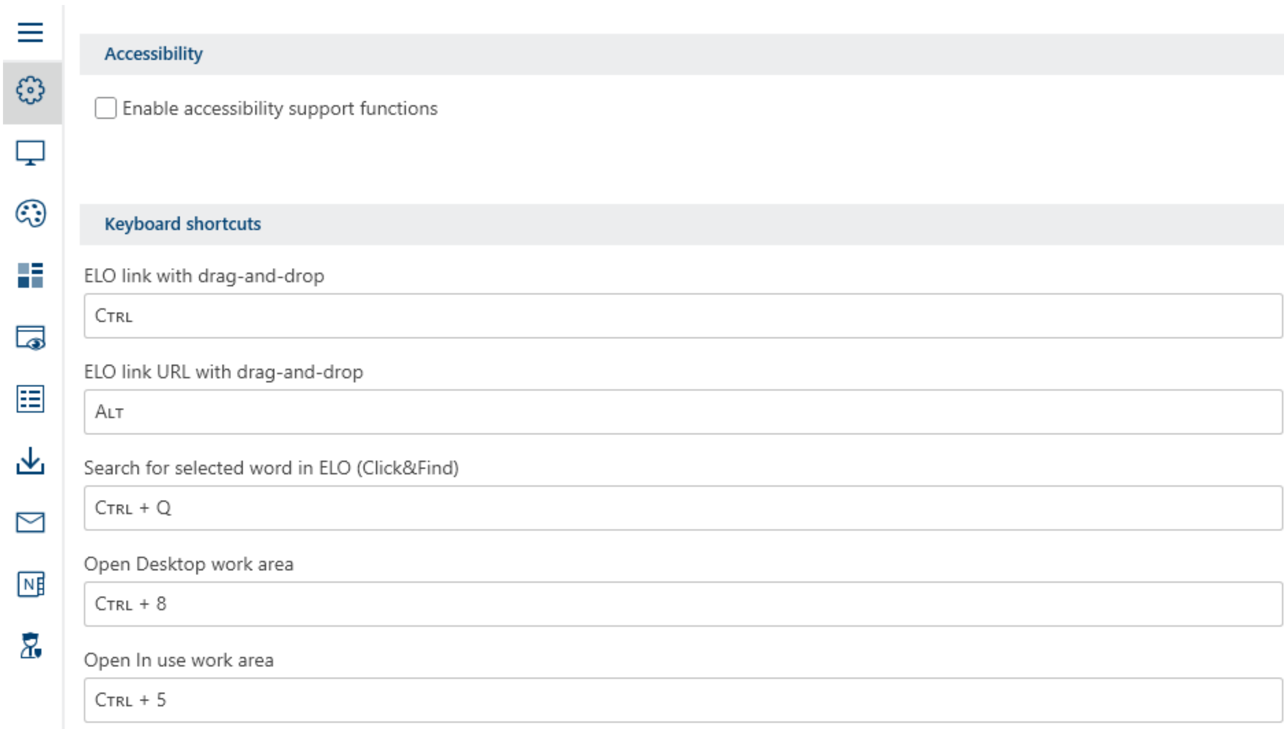
You can use this button to show or hide the "Set by" column. This shows at what level changes have been made to the settings.

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

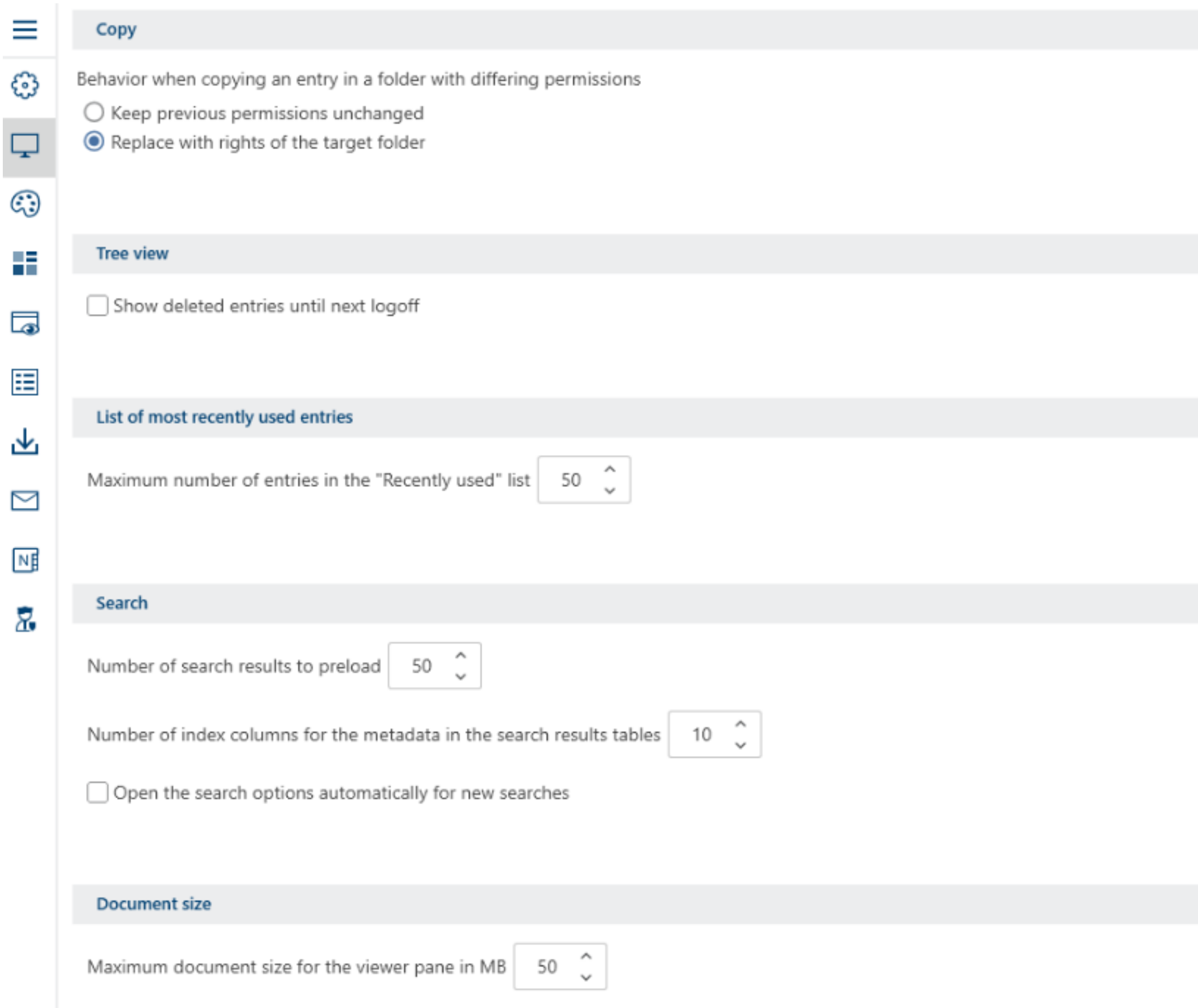
In the *Accessibility* section, you can enable accessibility support features for your ELO.

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.

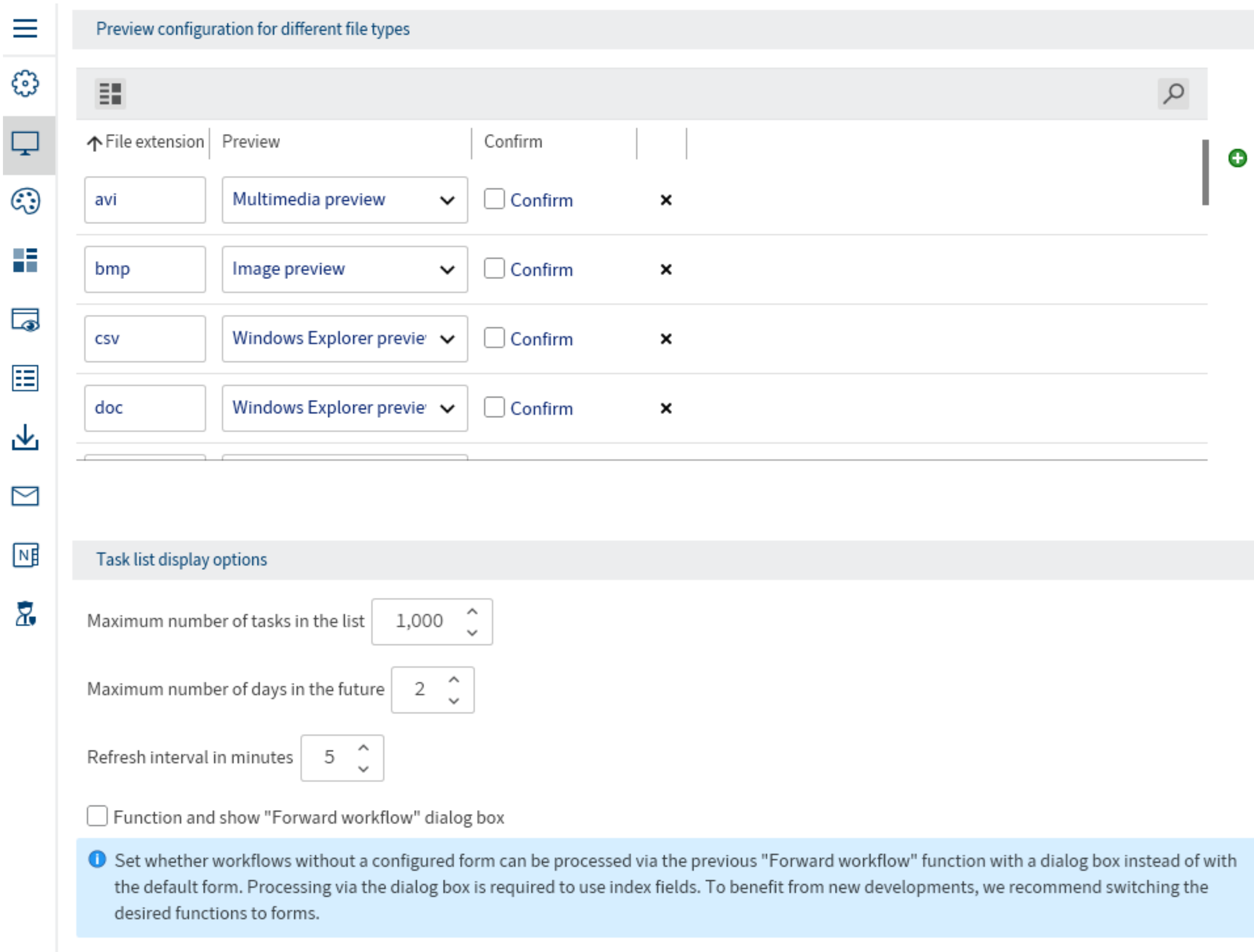
Configuration – Display (1)



Search

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

Configuration – Display (2)



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.
-

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.

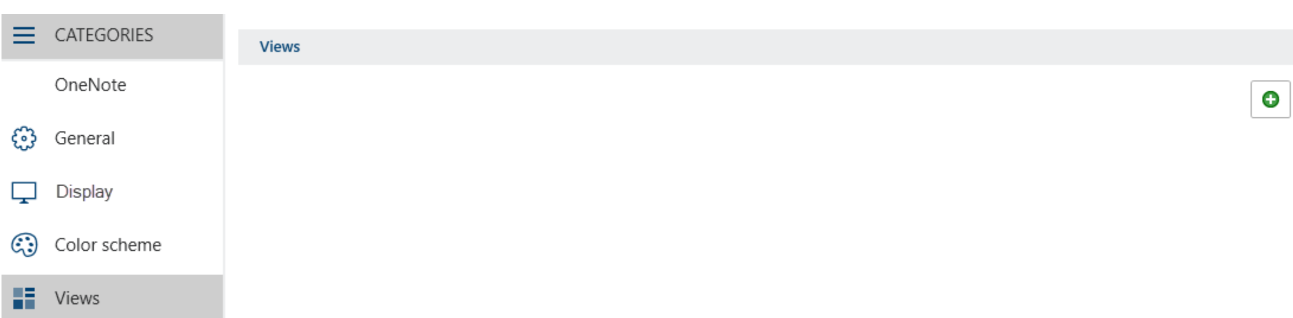
> **Information**
>
> This configuration option is only available in ELO Desktop Client Plus.

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



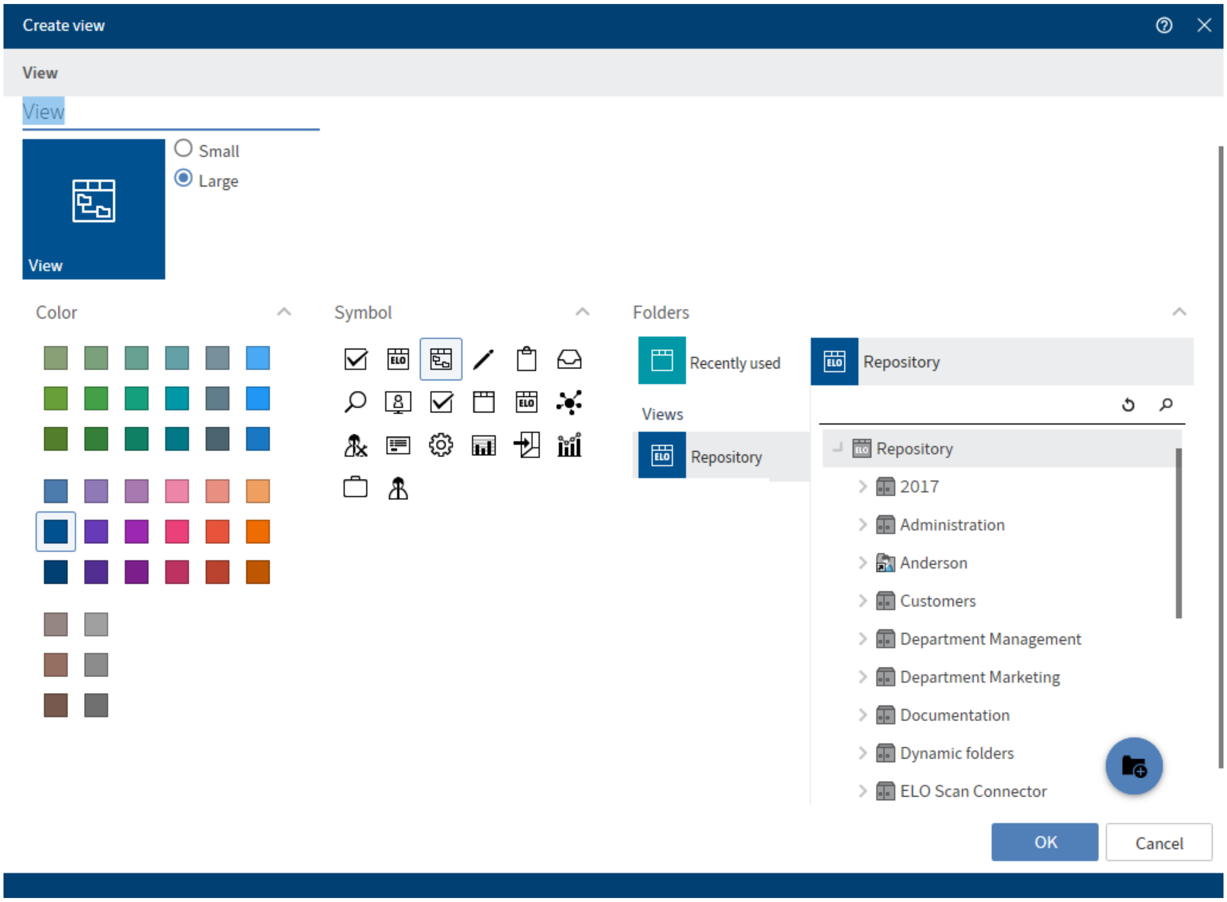
In the *Views* category, you can create views for folders in the *Repository* work area.

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

Method

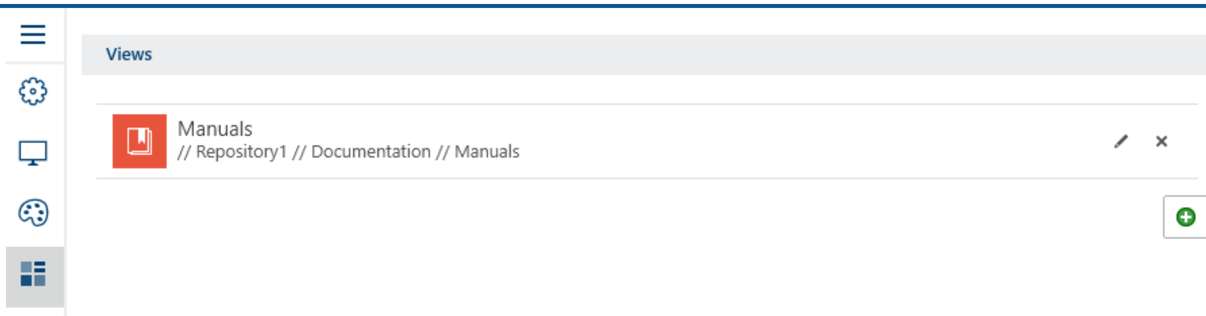
1.

Select the green plus icon to create a new view.



The *Create view* dialog box appears.

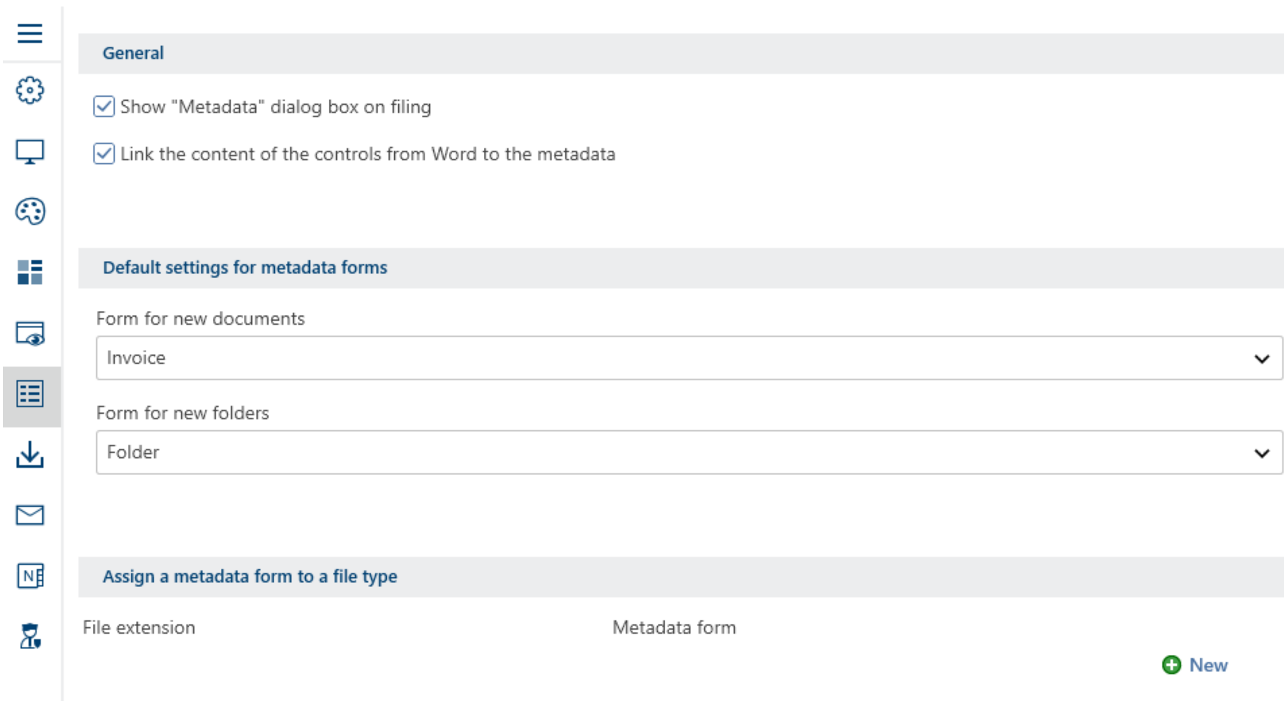
2. Enter a name for the view.
3. Select whether you want to display the view as a small or a large tile.
4. Choose a color for the view.
5. Select an icon.
6. In the *Folder* area, select the folder from the tree that you want to create a view for. With *Recently used*, you can narrow down the folders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

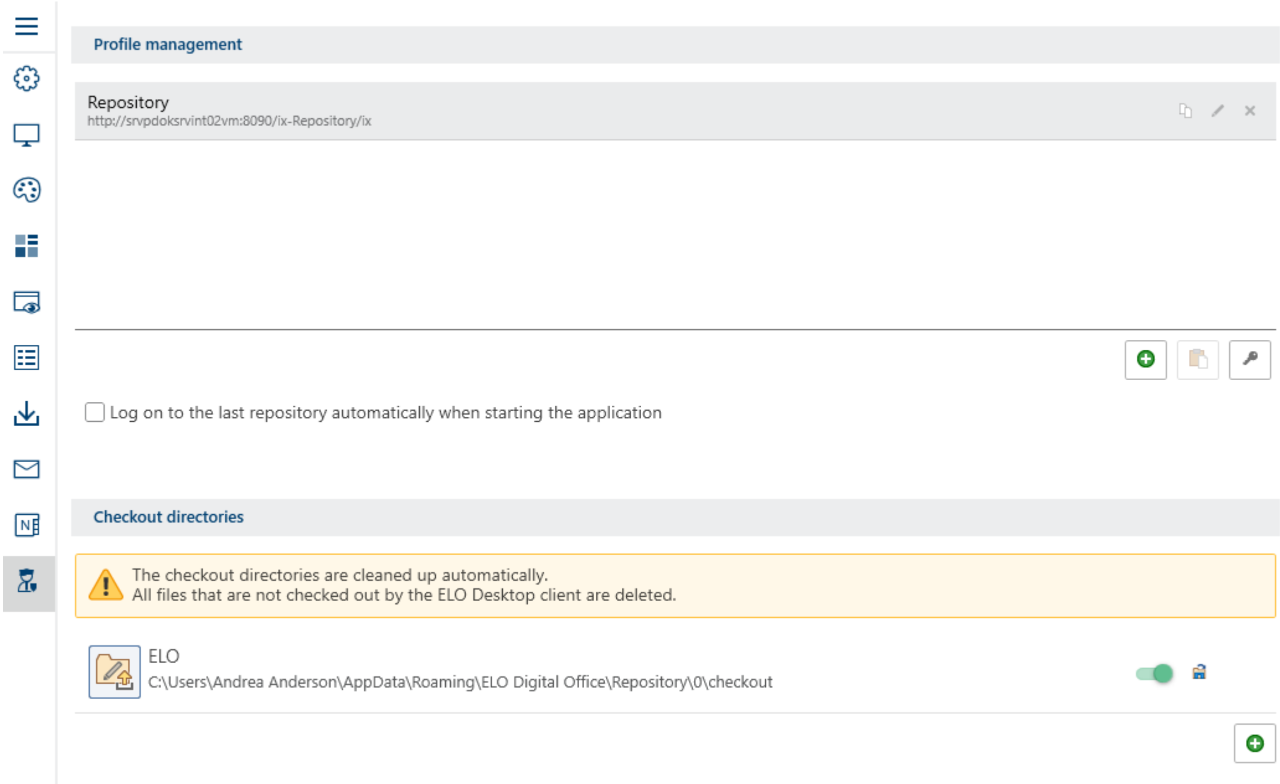
Configuration – Metadata



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.

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.

About

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

This is where you will find information about the version of your program. It can be useful to have the exact version, should errors occur in your program.

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.

Log off

Available in: *User menu [your name] > Log off*

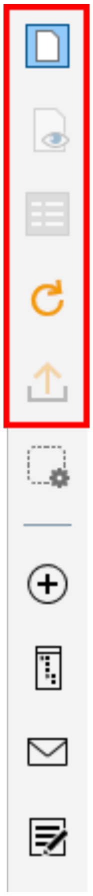
This where you log off from ELO.

Close

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

Close ELO with this function.

Favorites bar



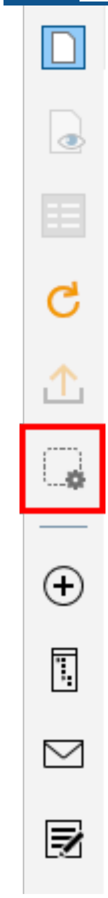
The favorites bar is on the left edge of ELO. This bar is only available in the *Repository*, *Search*, and *In use* work areas as well as the *Tasks* work area (only ELO Desktop Client Plus).

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.

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

Manage favorites

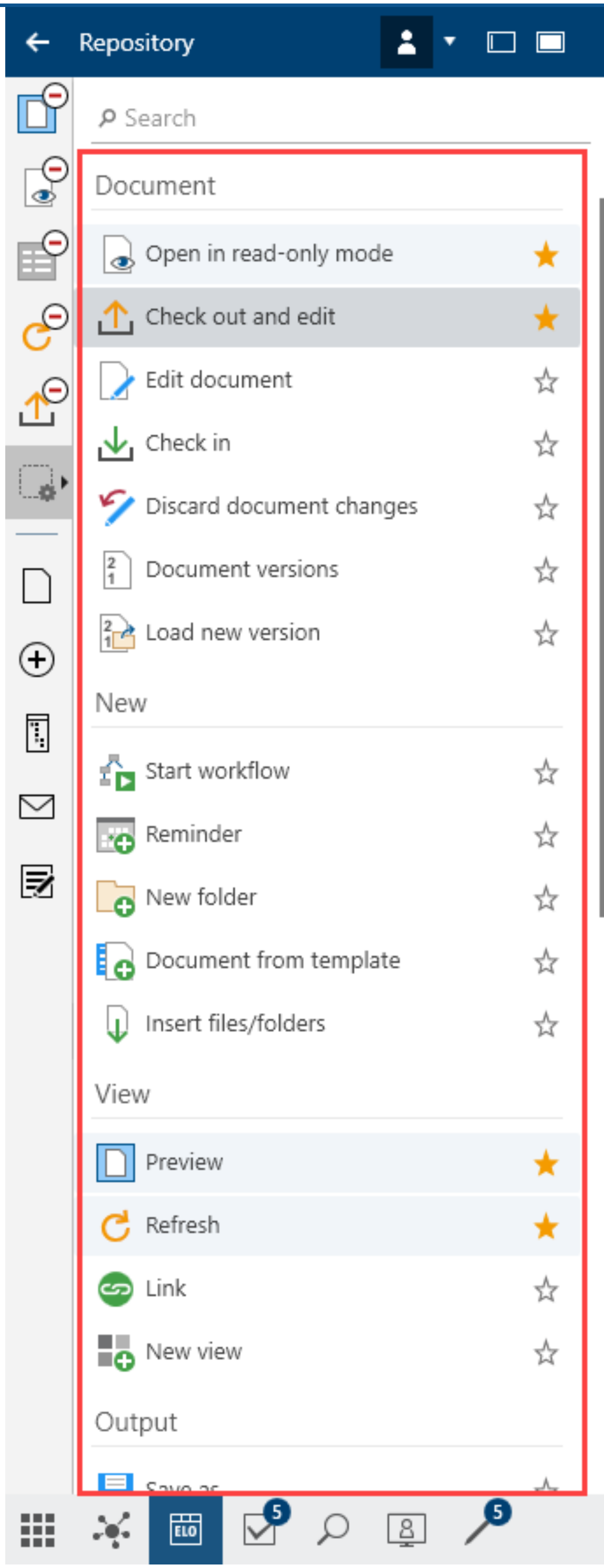
With *Manage favorites*, you can tailor your favorites list to your needs. All functions of the area are listed here, sorted by function groups.



Add functions

Method

1. Select *Manage favorites*.


Repository
Search
Document
Open in read-only mode
Check out and edit
Edit document
Check in
Discard document changes
Document versions
Load new version
New
Start workflow
Reminder
New folder
Document from template
Insert files/folders
View
Preview
Refresh
Link
New view
Output

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*.

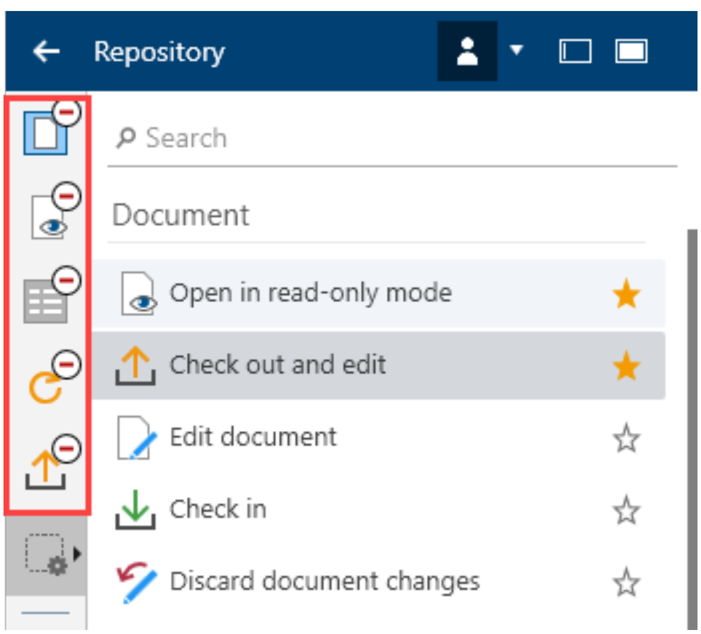
   In the *Search* and *Tasks* work areas, the contextual group *Search* or *Tasks* is also available.

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

Result

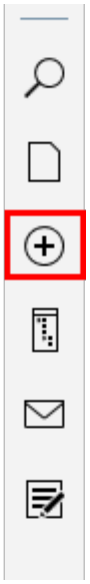
The yellow star is removed and the icon for the function disappears from your favorites list.

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.

'New' group



The following functions are available in the *New* group.

Information

Not every function in the *New* group can be used in every work area. In this case, the relevant function is grayed out.

Start workflow (only ELO Desktop Client Plus)

Available in: *Tasks* work area

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.

You can learn how to start a workflow in the Start workflow section of the *ELO Desktop Client Plus* chapter.

Reminder (only ELO Desktop Client Plus)

Available in: *Tasks* work area

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.

You can learn how to create reminders in the Reminder section of the *ELO Desktop Client Plus* chapter.

New folder

Available in: *Repository* work area

The *New folder* function creates a new folder entry in ELO.

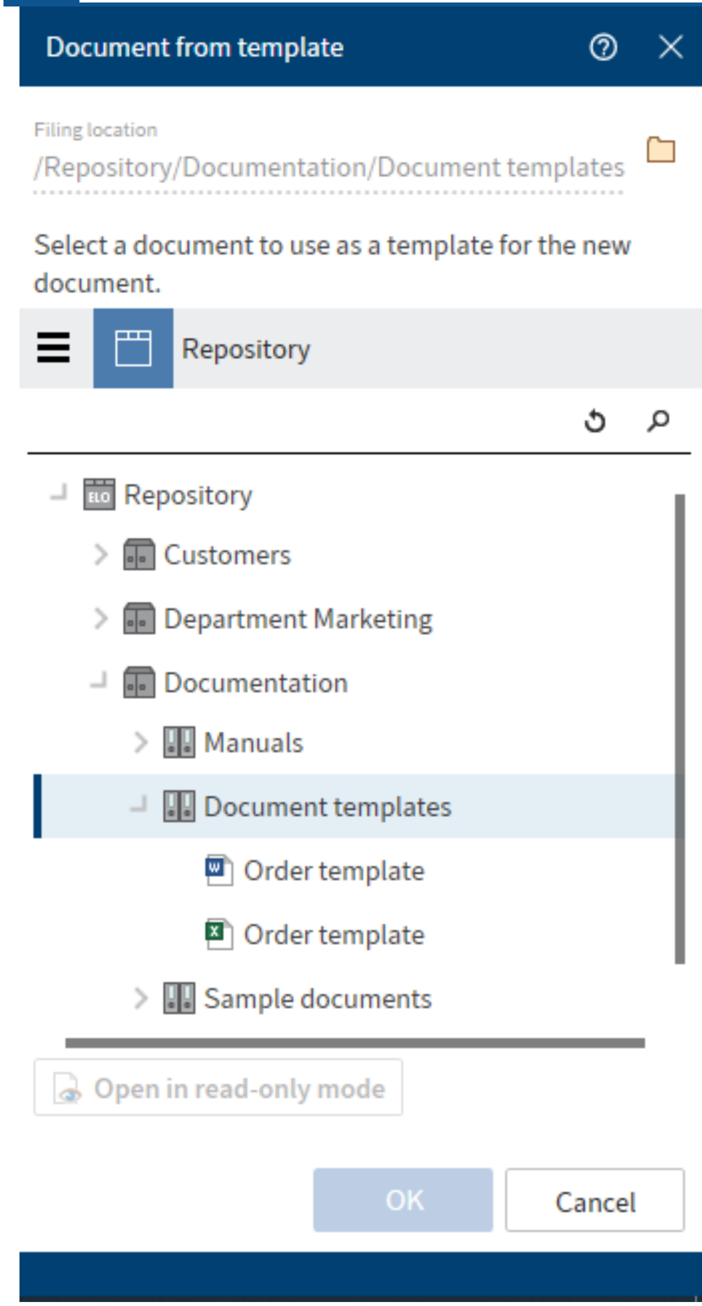
Keyboard shortcut: INS key

In the chapter *Important actions in detail*, refer to the section Create new folder for more information.

Document from template

Available in: *Repository* work area

The *Document from template* function creates a new document in ELO from a document template.



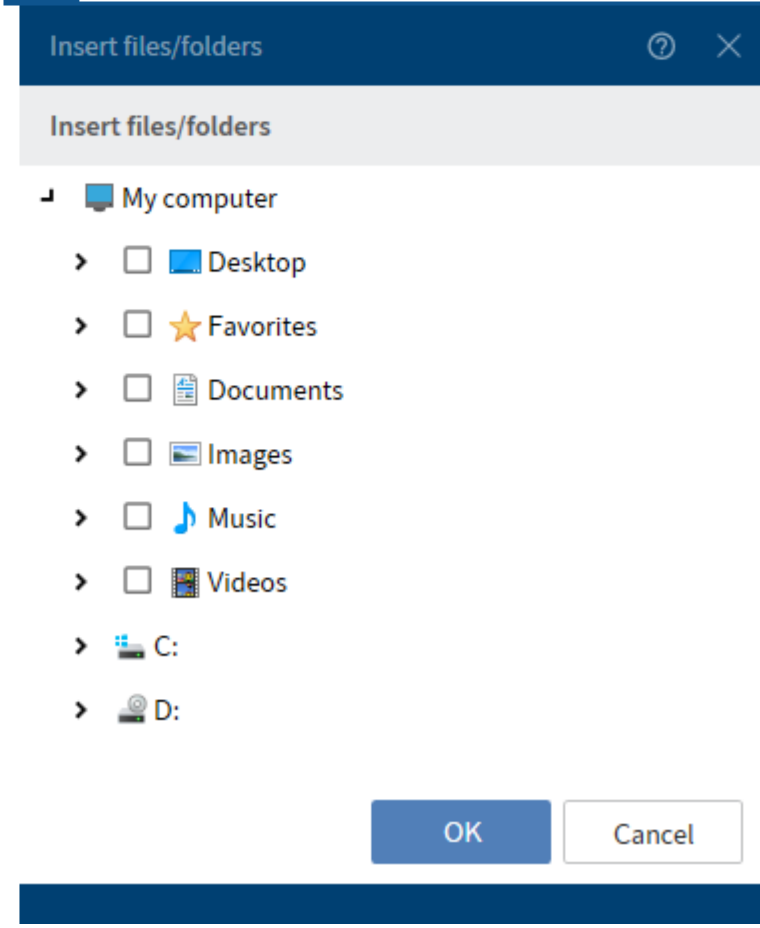
A window opens for selecting a document that will be used as the template for the new document. Choose a document from the folder defined for document templates in the configuration, then confirm with *OK*. The document is added to the selected folder and opened for editing.

Before making a selection, you can open and view a document template.

Insert files/folders

Available in: *Repository* work area

With the *Insert files/folders* function, you can file a document or folder from the file system to the selected folder in ELO.



In the chapter *Important actions in detail*, refer to the section Insert files/folders for more information.

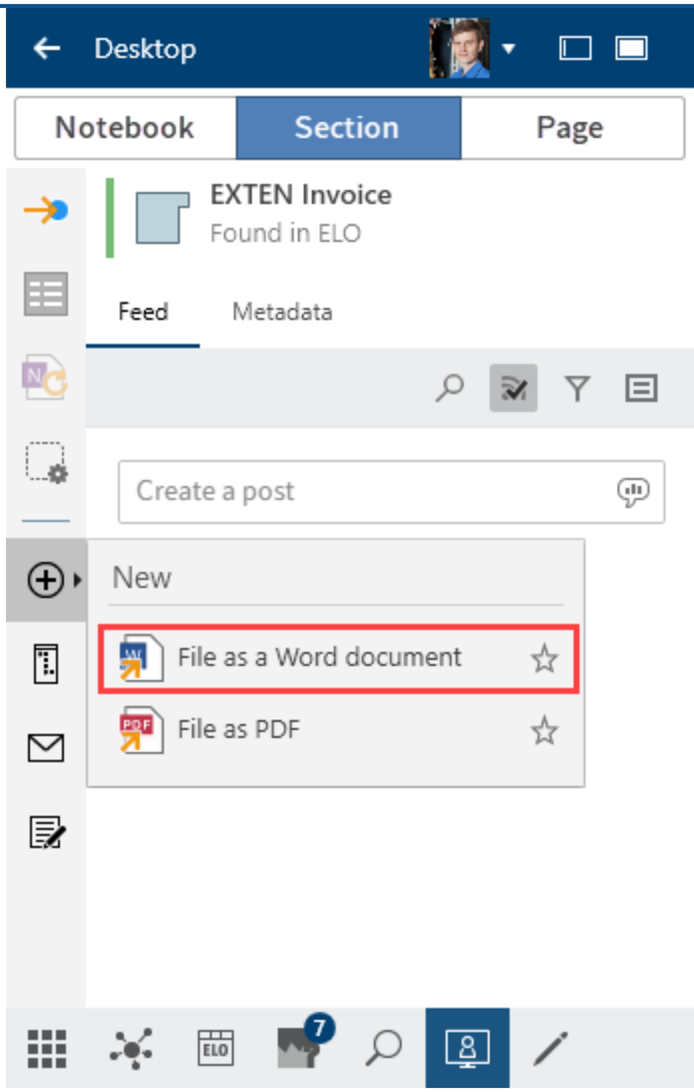
File as a Word document

Available in: *Desktop* work area

With the *File as a Word document* function, you can convert a Microsoft OneNote item (section or page) that is already filed to ELO into a Word document and file it as a new document in ELO.

Method

1. Open both Microsoft OneNote and the *Desktop* work area at the same time.
2. On the toolbar, select *New > File as a Word document*.



The *Repository* dialog box opens.

3. Select the folder where you want to file the document and confirm with *OK*.

   The *Metadata* dialog box opens.

4. Enter the metadata and close the dialog box with *OK*.

Result

The Microsoft OneNote item is filed to ELO as a Word document.

File as PDF

Available in: *Desktop* work area

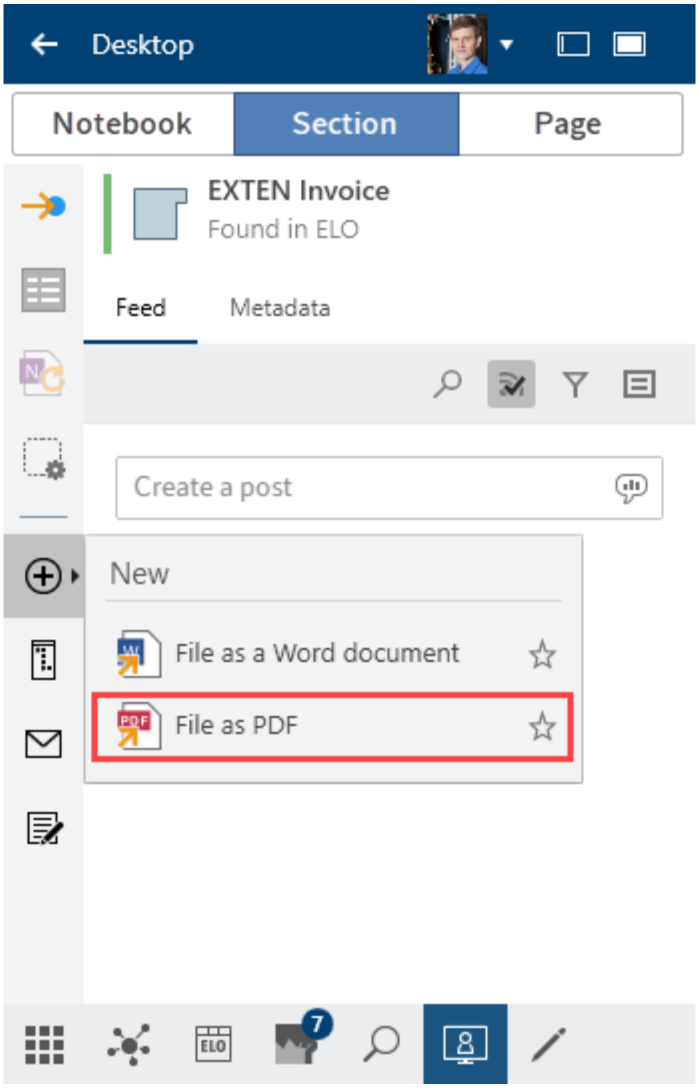
With the *File as PDF* function, you can convert a Microsoft OneNote item (notebook, section, or page) that is already filed to ELO into a PDF document and file it as a new document in ELO.

Method

1.

Open both Microsoft OneNote and the *Desktop* work area at the same time.

2. On the toolbar, select *New > File as PDF*.



The *Repository* dialog box opens.

3. Select the folder where you want to file the document and confirm with *OK*.

The *Metadata* dialog box opens.

4. Enter the metadata and close the dialog box with *OK*.

Result

The Microsoft OneNote item is filed to ELO as a PDF document.

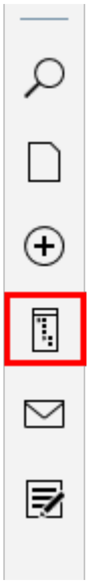
Save in ELO

Available in: *Search* work area

With the combined search in ELO and Microsoft Outlook, entries that have not yet been filed to ELO are also shown in the results list in the *Search* work area.

With the *Save in ELO* function, you can save these entries in your ELO repository.

'View' group



The following functions are available in the *View* group.

> **Information**
>
> Not every function in the *View* group can be used in every work area. In this case, the relevant function is grayed out.

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.

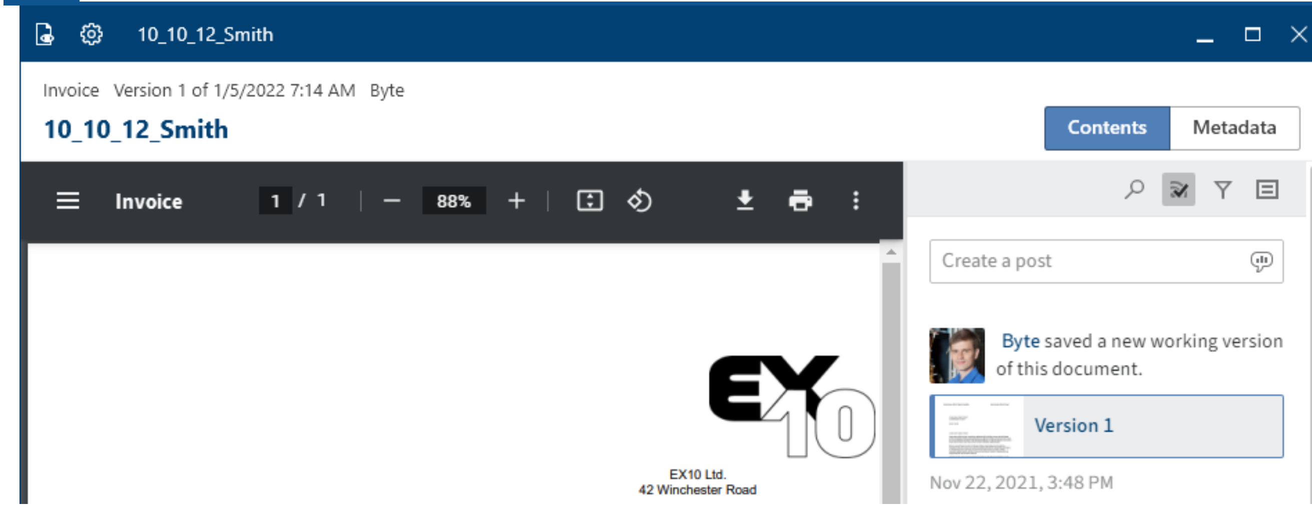
Keyboard shortcut: SPACE

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

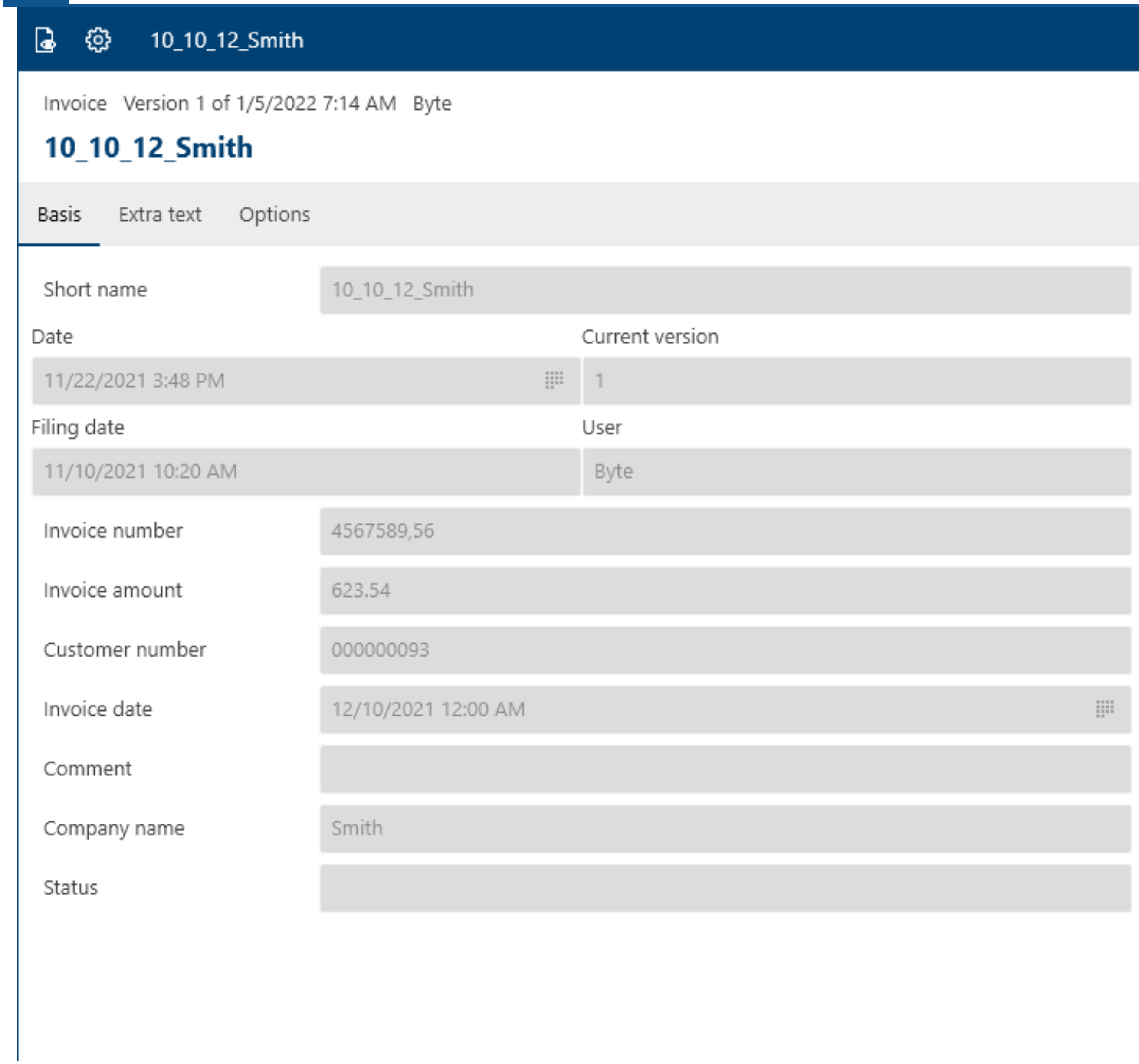
If a link exists for an entry, this is indicated in the preview header.

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

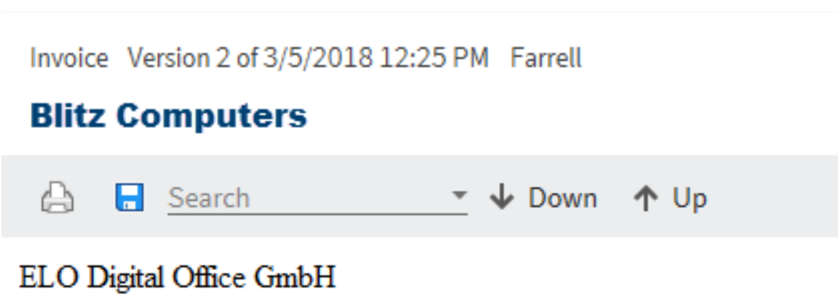
The Feed chapter explains what options are available on this tab.

Selecting the *Metadata* button switches to the preview.



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.

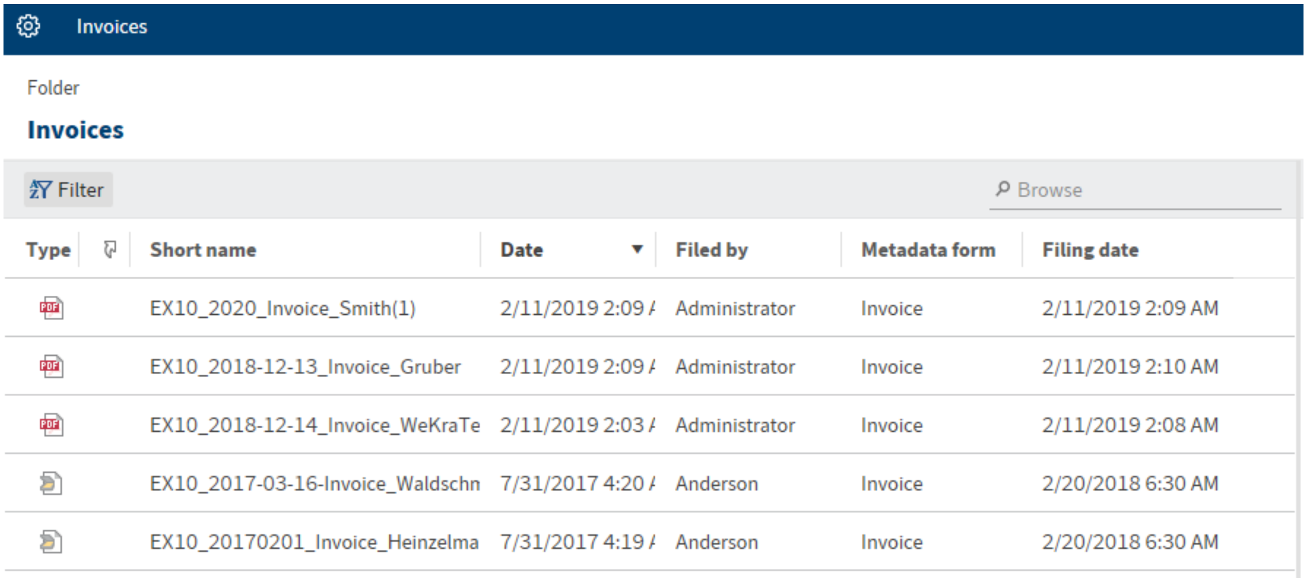
If full text information is available for the entry, you can open it by selecting the *Full text* button.



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

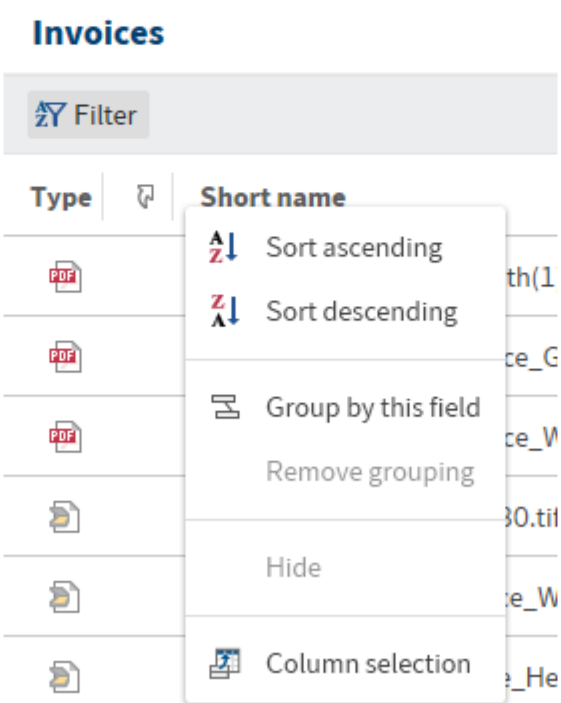
Folder preview

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



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.



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

Refresh

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

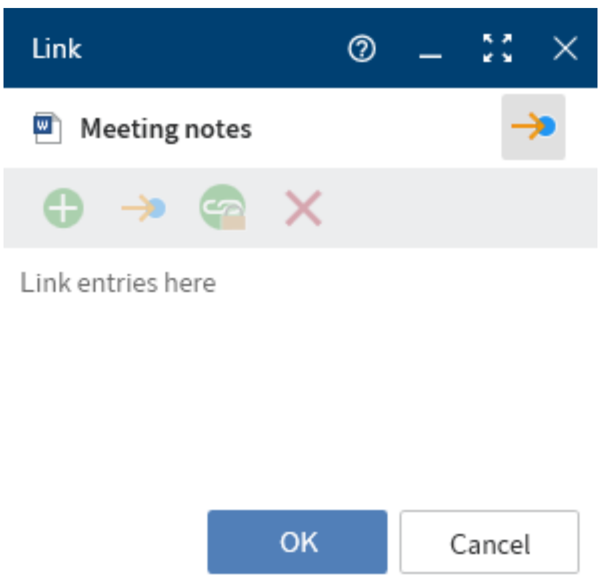
Keyboard shortcut: F5 key

Link

In the *Link* dialog box, you can link the selected entry with other entries or view and edit existing links.

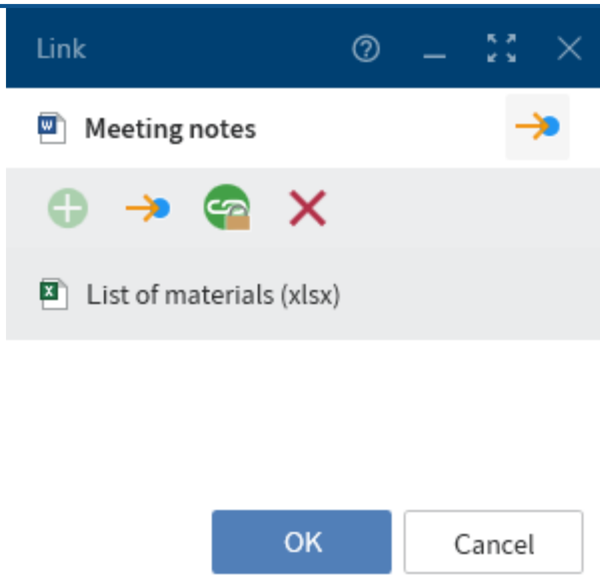
Method

1. To link two entries, select the first document in the *Repository* work area, then select *Link* from the context menu.

   The *Link* dialog box opens.

2. In the repository, select a second document and drag it to the *Link* window.



Result

The document is shown in the list of links in the *Link* dialog box. You can add more links in this same way.

Three links are shown in this view. If more than three links exist, you can access the additional list entries via the scrollbar.

The following functions are available in the *Link* dialog box:

Minimize: The dialog box is minimized to a link icon you can move in the sidebar. You can also create links by dragging elements to this icon. Select the icon to restore the original dialog box size.

Maximize: The dialog box is enlarged to the size of the entire sidebar. In this view, the list of links takes up quite a bit of space. This helps you get a better overview should more than three links exist.

Go to: To go to the entry in the repository, select it in the list of links and then select the button with the arrow icon or use the keyboard shortcut CTRL + G.

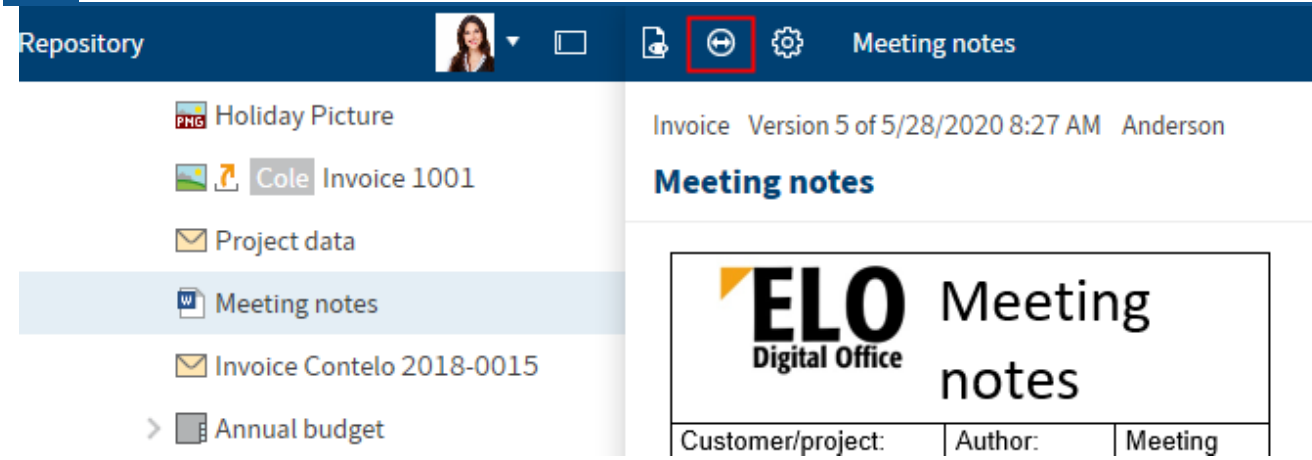
Remove: To remove a link, select the entry in the list of links and select the X icon (keyboard shortcut: DEL key). The links to the entries are removed.

Create new entries as permanent links: Enable this option or use the keyboard shortcut CTRL + L to prevent links added from being removed.

Please note

Inseparable links cannot be deleted.

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



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.

For more information on the *New view* function, refer to the Important actions in detail chapter.

Task view (ELO Desktop Client Plus only)

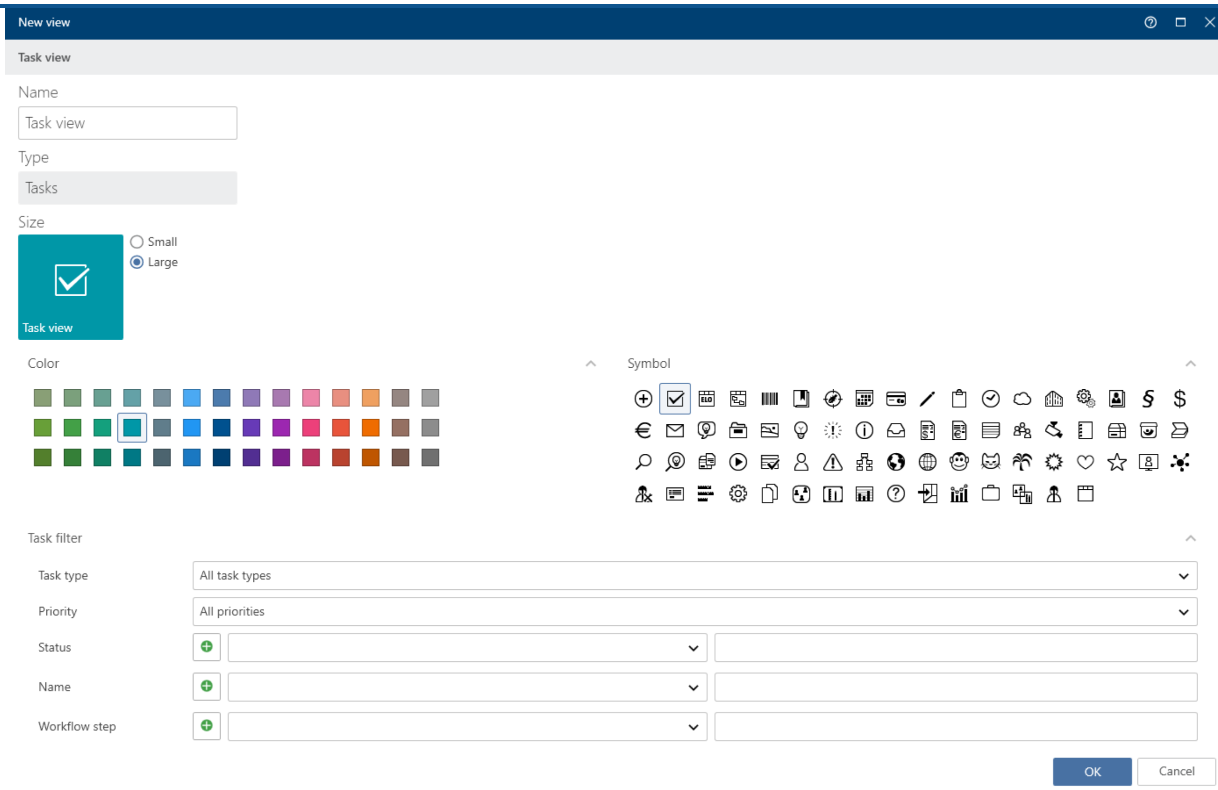
Available in: *Tasks* work area

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*.



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*.

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

'Output' group

The following functions are available in the *Output* group.

> **Information**
>
> Not every function in the *Output* group can be used in every work area. In this case, the relevant function is grayed out.

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

Send

With the *Send* function, you can send the selected document via e-mail. A new e-mail opens in your e-mail program with the document attached.

Send as ELO link

The *Send as ELO Link* functions sends a selected entry as an ELO link. A new e-mail opens in your e-mail program with an ELO link attached. The link leads to the ELO repository. The recipient must have access to the ELO repository.

Print

The *Print* function prints the selected document. The Windows *Print* dialog box opens, where you can configure additional printer settings.

Keyboard shortcut: CTRL + P

'Organize' group

The following functions are available in the *Organize* group.

> **Information**
>
> Not every function in the *Organize* group can be used in every work area. In this case, the relevant function is grayed out.

Metadata

This function allows you to view the metadata for the entry.

If you have permission, you can edit the metadata.

Metadata is data about a folder or a document. It includes information on the entry itself, for example when it was filed, or its name in the *Repository* work area. It also includes the permissions structure for the entry, meaning who has what access to the entry. The quality of a repository depends to a great extent on the quality of the metadata. Metadata allows you to organize documents in a standardized way and file them quickly to ELO. In addition, using metadata makes it easier to find documents.

A new metadata model was introduced with version ELO 21 in addition to the previous metadata model. Both models are used in parallel. In the following, these metadata models are referred to as generation 1 (gen. 1) and generation 2 (gen. 2).

In gen. 2, forms and metadata forms are shown differently in the *Metadata* dialog box. The metadata concept will remain the same.

There are three ways to open the *Metadata* dialog box manually. Select an entry and

-

on the toolbar, select *Organize > Metadata*.
- right-click to open the context menu, then select *Metadata*.
- press the keyboard shortcut F4.

To ensure the active application isn't covered up, the dialog box is shown simplified in the sidebar with all fields in list form.

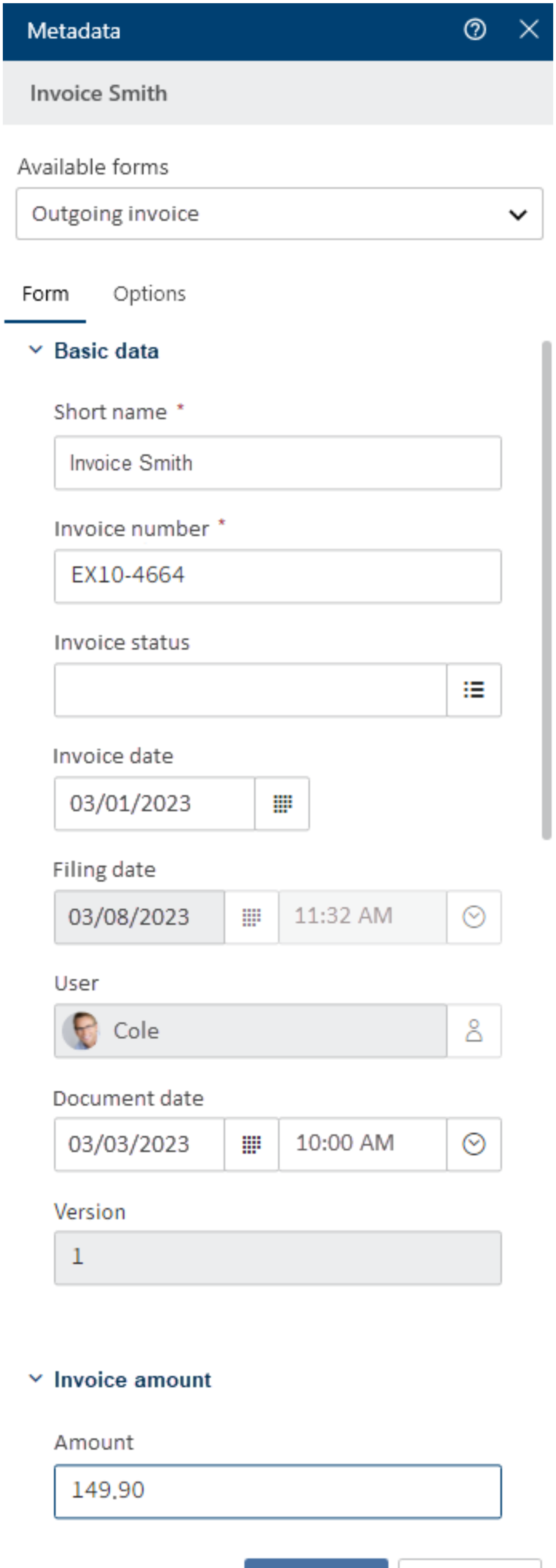
This section provides information about entering metadata:

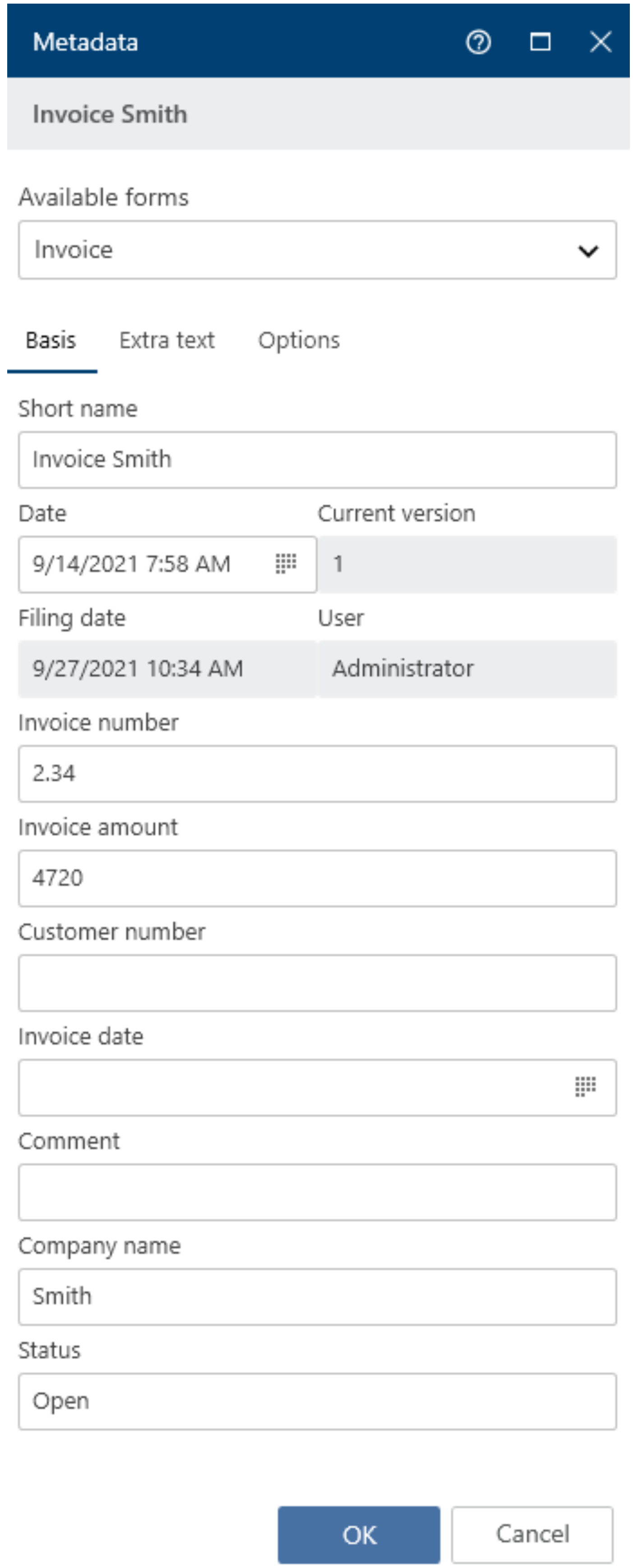
- Metadata forms
- Fields
- 'Basic' tab
- 'Extra text' tab
- 'Options' tab

Metadata forms

You enter metadata into metadata forms. Metadata forms contain templates that are specifically created for this document type. All documents of the same type receive the same permission settings and are filed to ELO based on a fixed pattern.

The appearance of and functions in the metadata forms depend on the metadata model.


Metadata
Invoice Smith
Available forms
Outgoing invoice
Form
Options
Basic data
Short name *
Invoice Smith
Invoice number *
EX10-4664
Invoice status
Invoice date
03/01/2023
Filing date
03/08/2023
11:32 AM
User
Cole
Document date
03/03/2023
10:00 AM
Version
1
Invoice amount
Amount
149.90


Metadata
Invoice Smith
Available forms
Invoice
Basis
Extra text
Options
Short name
Invoice Smith
Date
Current version
9/14/2021 7:58 AM
1
Filing date
User
9/27/2021 10:34 AM
Administrator
Invoice number
2.34
Invoice amount
4720
Customer number
Invoice date
Comment
Company name
Smith
Status
Open
OK
Cancel

The *Available forms* area lists all the available metadata forms. The list contains either metadata forms for folders or for documents, depending on the type of entry selected in ELO.

Select a metadata form from the drop-down menu.

> **Please note**
>
> When you change the metadata form, metadata may be lost or incorrectly assigned.

Fields

The metadata for a document is entered into fields.

The type of field determines the data you need to enter and what you need to consider when doing so. There are different types of fields, which can be configured differently from metadata form to metadata form.

Text field: You can enter letters, numbers, and special characters in a text field.

Mandatory field: Fields can be configured as mandatory to complete the metadata entry. A red asterisk or a red marking indicates that a field is mandatory. If there are any conflicts, a warning will appear below the field.

> **Please note**
>
> Do not enter any words that can act as search operators (`NOT`, `OR`, `AND`) in fields. Otherwise, you may encounter issues when searching for these words.

Icons

If a field contains an icon, this means that ELO helps you to enter content in the field.

The following tools are available:

- Keyword list
- Drop-down menu
- Calendar
- Time
- Relation

Keyword lists

Keyword lists are used to standardize entries and make it easier to enter metadata.

There are two types of fields with keyword lists:

- You have to select an entry from the keyword list.
- You can select an entry from the keyword list or you can type in your own entry.

If you click a field and a keyword list appears, you cannot make entries.

To open the keyword list, select the keyword list icon. Navigate the list using the mouse or arrow keys.

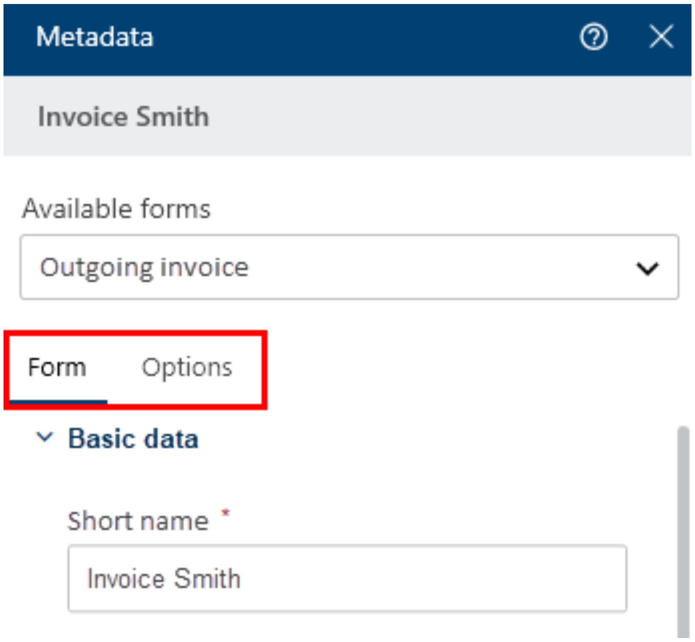
Relations

Relation type fields are used to link a field with the metadata of another entry.

Clicking the chain icon opens a list of entries. Select the entry you want to link. Navigate the list using the mouse or arrow keys.

Clicking the arrow next to the chain icon takes you straight from the metadata of the entry to the metadata of the linked entry.

Tabs



The dialog box for entering metadata is divided into tabs. All metadata forms contain the following tabs:

- *Form* (in gen. 1 metadata forms, this tab is called *Basic*)
- *Extra text* (only in gen. 1 metadata forms)
- *Options*

'Basic' tab

> **Information**
>
> In gen. 2 metadata forms, this tab is called *Form*.

The *Basic* tab contains at least the following five default fields:

Short name: You can change the display name of the entry in this field.

Document date (gen. 2)/Date (gen. 1): The date can be freely assigned and changed via the calendar icon. This field automatically contains the date of the last change for new entries and for changes.

Version (gen. 2)/Current version (gen. 1): Shows the current version.

Filing date: The filing date of the entry or creation date of the folder. The date is automatically set and cannot be changed.

Editor: The name of the user who last modified the entry. This field cannot be changed.

Additional fields appear depending on the settings in the metadata form.

'Extra text' tab

> **Information**
>
> This tab only appears in gen. 1 metadata forms.

In this text field, you can enter information that is not covered by the other fields, for example a more exact description or a comment. The field can also be used for script settings.

'Options' tab

Personal identifier: If the entry relates to a person, enter information that enables you to identify the relevant person in this field. This term is intended to help you find the entry using the metadata search.

> **Please note**
>
> The metadata search is only available in the ELO Java Client and ELO Web Client. You will find more information on personal data in the respective chapter of the ELO Java Client and ELO Web Client documentation.

End of deletion period: Enter the date on which the entry must be deleted at the latest. This date must come after the date you have entered under *End of retention period*. You can select a date using the calendar icon in the field.

> **Please note**
>
> If you do not complete the *Personal identifier* and *End of deletion period* fields, a dialog box will appear indicating that no personal identifier has been specified.

End of retention period: Enter the date on which the entry must be deleted at the latest. The entry cannot be deleted before the entered date.

> **Please note**
>
> The retention period must end before the deletion period.

Entry type: The entry type identified by ELO is displayed here. If necessary, select another entry type from the drop-down menu. This setting determines the icon that is displayed in the list view in ELO.

Font color: Select a font color from the drop-down menu, e.g. to highlight the entry in your filing structure. The system color is set by default.

Document status: Select the document status from the drop-down menu.

-

Version control enabled: When the document is changed, the previous versions are saved. The versions of a document can be restored.

- *Version control disabled*: Only one version of the document is saved. A new version replaces the previous version. The previous version is deleted and is no longer available.

> **Important**
>
> If you select this option, the previous version is overwritten each time you save. The *Document > Load new version* function overwrites the current version, and does not create a new one. For this reason, we do not recommend using this option.

- *Non-modifiable*: Neither the document nor the associated metadata can be edited.

> **Important**
>
> The status *Non-modifiable* cannot be reversed.

Encryption: Encrypt documents to restrict access to them. This option specifies which encryption key that controls document encryption should be used. The password must be entered when opening an encrypted document. This field is completed automatically depending on the selected metadata form and cannot be changed.

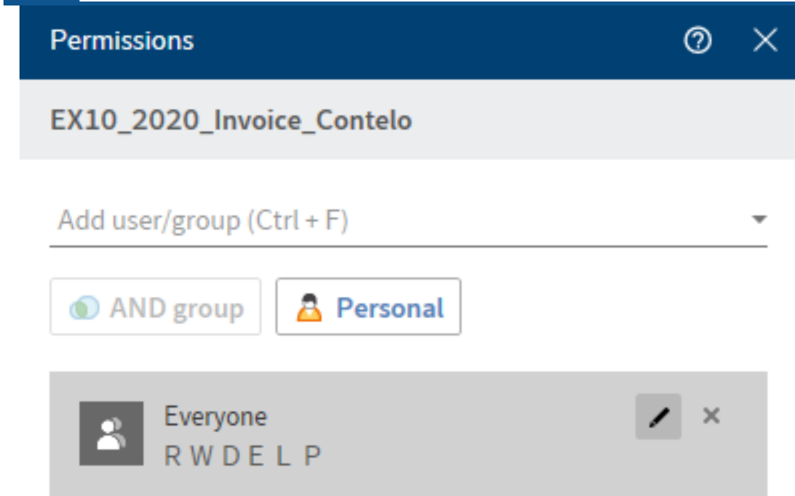
Add to full text database: When this option is enabled, documents are processed for the full text database and can be then found using the full text search. This requires the document to contain text information.

Object ID and GUID: This option shows the internal ELO entry number. This entry cannot be changed. The entry ID is required when testing the checksum.

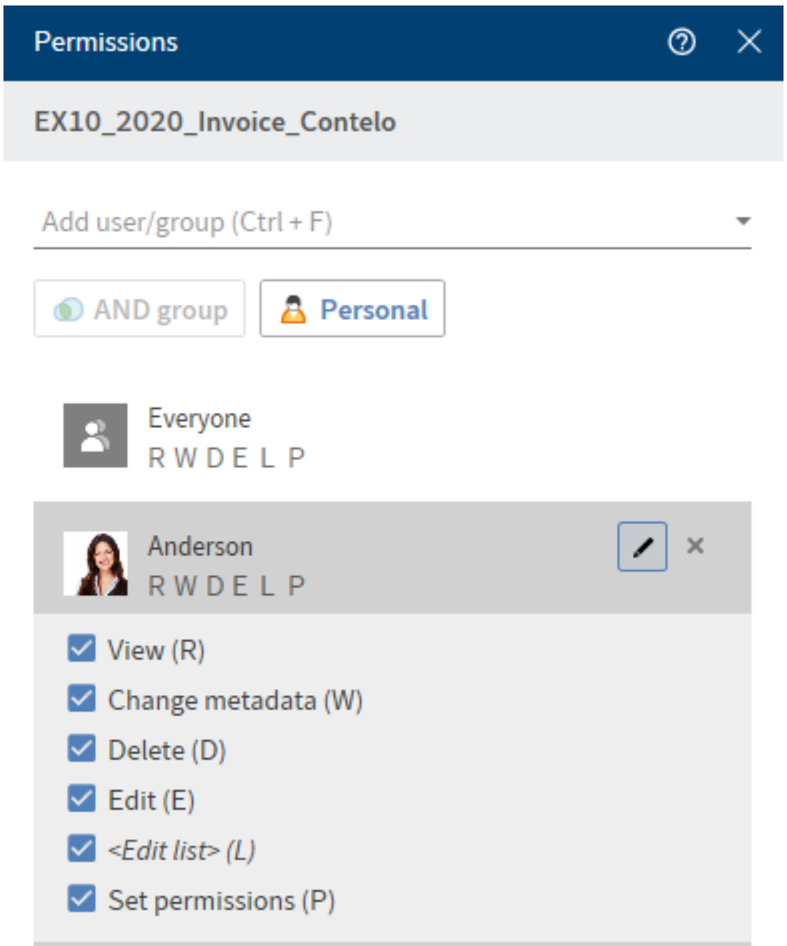
Filed by: The user who filed or entered the metadata for the document is entered here automatically. This field cannot be changed.

Permissions

The users that have access rights to the selected entry are listed in the *Permissions* dialog box. You can change the settings, provided you have the corresponding permission.



Add user/group: From the drop-down menu, select a user or group that you want to give permission to this entry.



The permissions settings for the selected user or group appear and can be enabled or disabled. Edit existing settings by selecting the pencil icon (keyboard shortcut: ALT + 2).

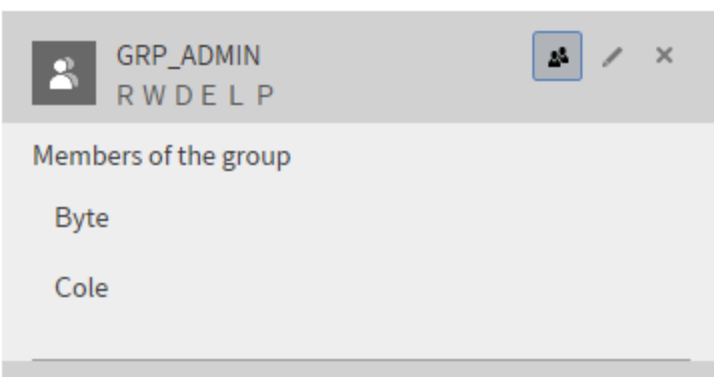
The following options are available:

Access right	Description
View (R)	View entries and metadata, add annotations
Change metadata (W)	
Delete (D)	Mark entries as deleted. Only users with administrative rights can delete entries permanently.
Edit (E)	• Documents: Edit documents, e.g. check in, check out, load new version, change working version. • Folders: No effect. If this access right is granted to folders, entries stored in them can automatically inherit this access right.
Edit list (L)	• Folders: Change folder contents, e.g. create, move, copy, or remove documents in the folder, insert or delete reference.
Set permissions (P)	Change permissions

To remove an existing permission, select the X icon (keyboard shortcut: DEL key).

AND group: To create a new group from the overlapping groups, select at least two groups and then select *AND group*.

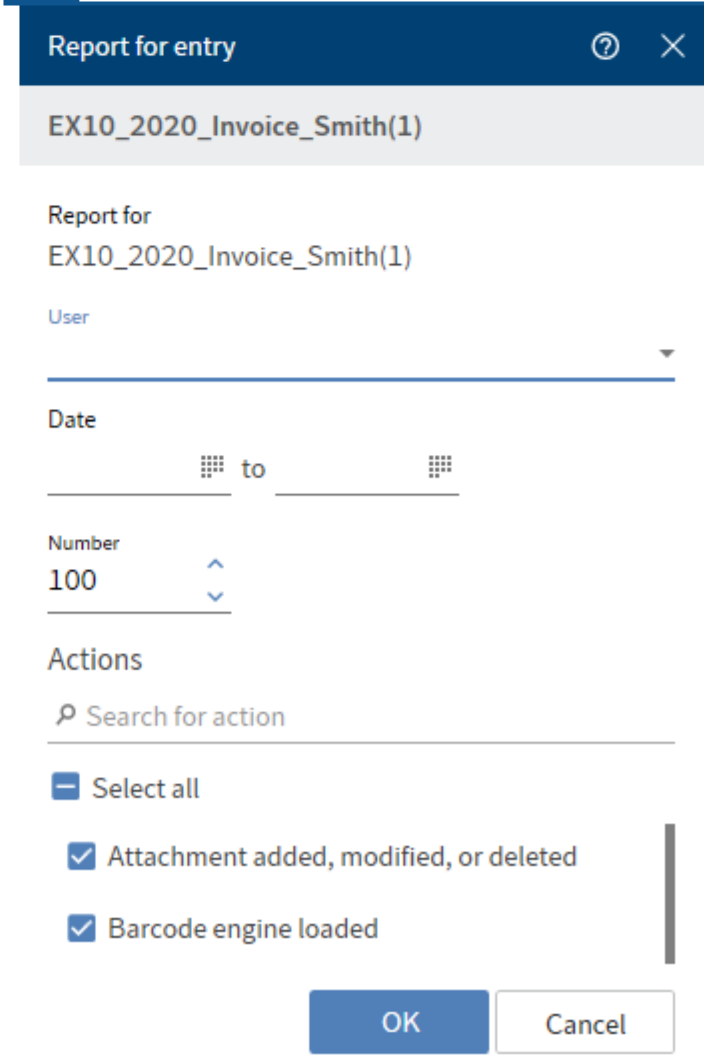
Personal: Select *Personal* to assign yourself sole access to the selected entry. All other permissions will be revoked.



Show group members: To show all members of a group, select the group icon (keyboard shortcut: ALT + 1).

Report for entry

With the *Report for entry* function, you can create a report for the selected entry.



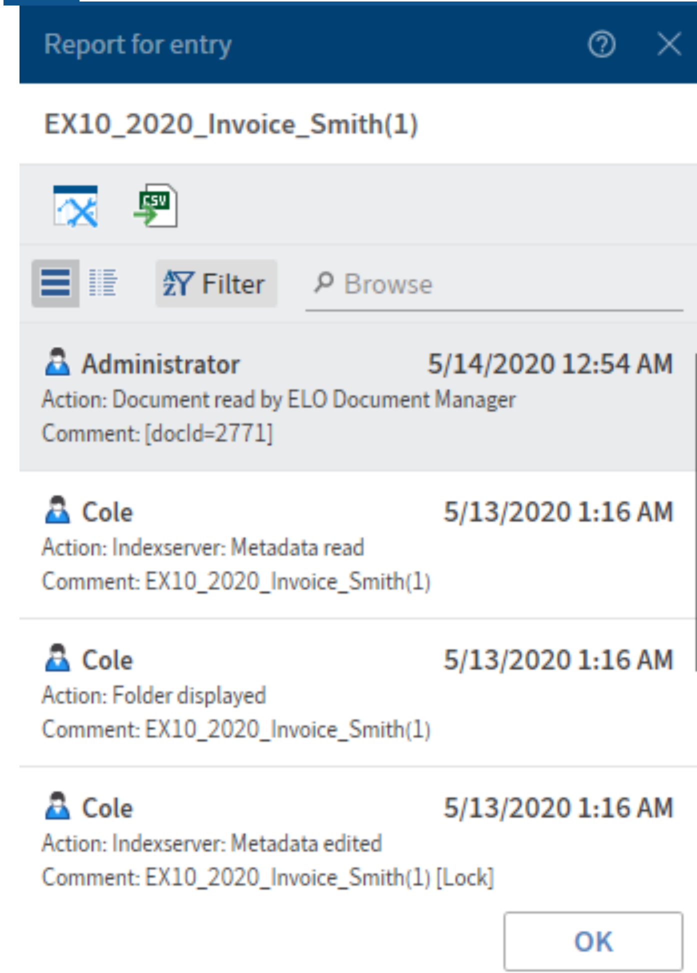
In the *Report for entry* dialog box, you can choose from the following options to be included when creating the report.

User: Select one or more users and/or groups from the drop-down menu. Users and groups that are not selected are not included in the report.

Date: Narrow down the report period using the calendar icon.

Number: Configure the maximum number of entries. Only this number is included in the report (most current).

Actions: Check the actions you want to be included in the report. You can search for a specific action using the search field.



The report for the entry appears in the list view.

You can change the report options by selecting the tool icon. The arrow icon saves the report as a CSV file. A dialog box for selecting the target path on the file system opens.

You can view the report either in list or table format. Select the view via the corresponding button. By selecting *Filter*, you can sort, group, and filter to narrow down what's shown. The search field next to the magnifying glass icon also allows you to narrow down the results with its *search-as-you-type* function.

Synchronize Microsoft OneNote item

With the *Synchronize OneNote item* function, you can synchronize a Microsoft OneNote notebook, individual sections, or pages saved in ELO with the changes you've made in Microsoft OneNote. Refer to the File Microsoft OneNote items to ELO section of the *Important actions in detail* chapter to learn how to file Microsoft OneNote items to ELO.

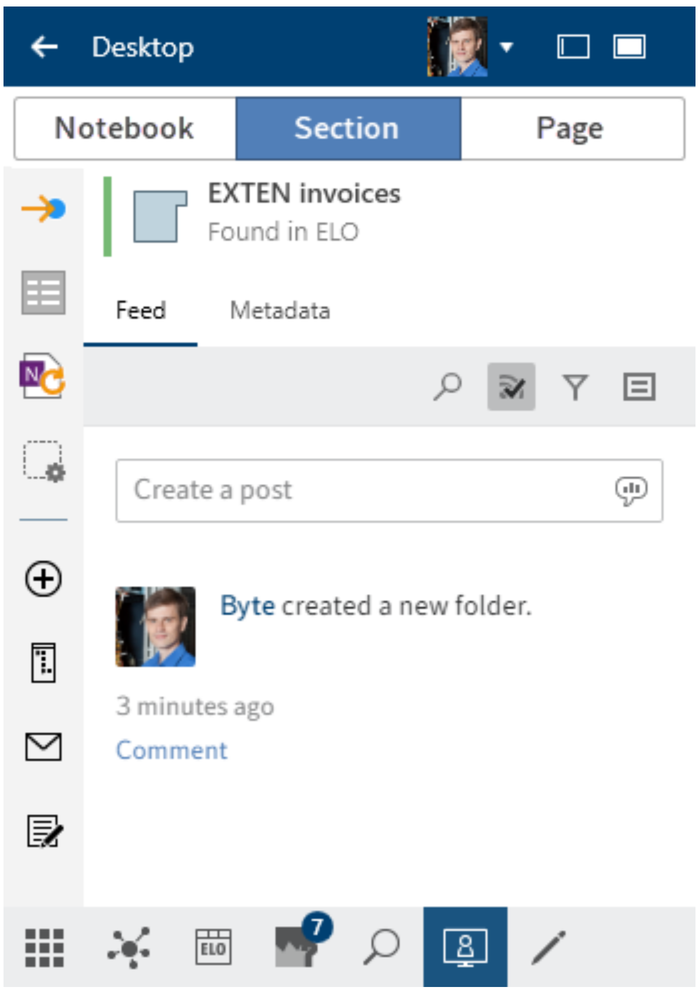
Synchronize section

In this example, a section *EXTEN orders* is inserted in the *EXTEN notes* notebook containing the section *EXTEN invoices* and will be synchronized with the items that have already been filed to ELO.

Method

1. Open Microsoft OneNote with the changed section and the *Desktop* work area at the same time.

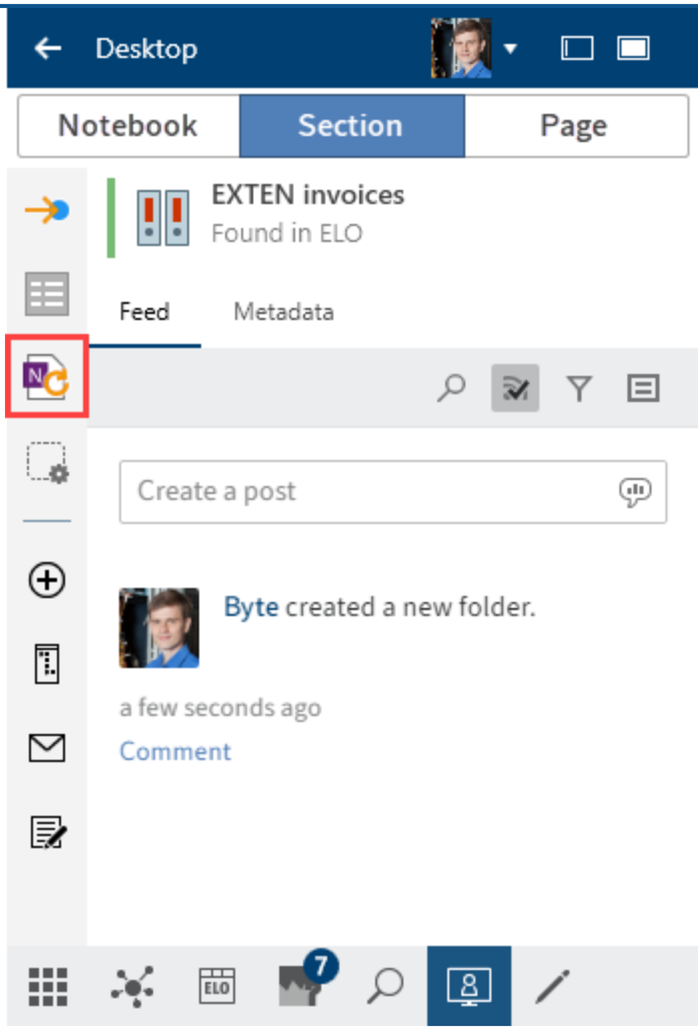
2. In the *Desktop* work area, navigate to the *Section* tab.



The section open in Microsoft OneNote is shown in the *Desktop* work area with a note indicating that it is in ELO.

3. On the toolbar, select *Organize > Synchronize OneNote item*.

Alternative: Select the corresponding icon in the favorites bar.



The *Metadata* dialog box opens.

4. Complete the *Metadata* dialog box with the necessary information.

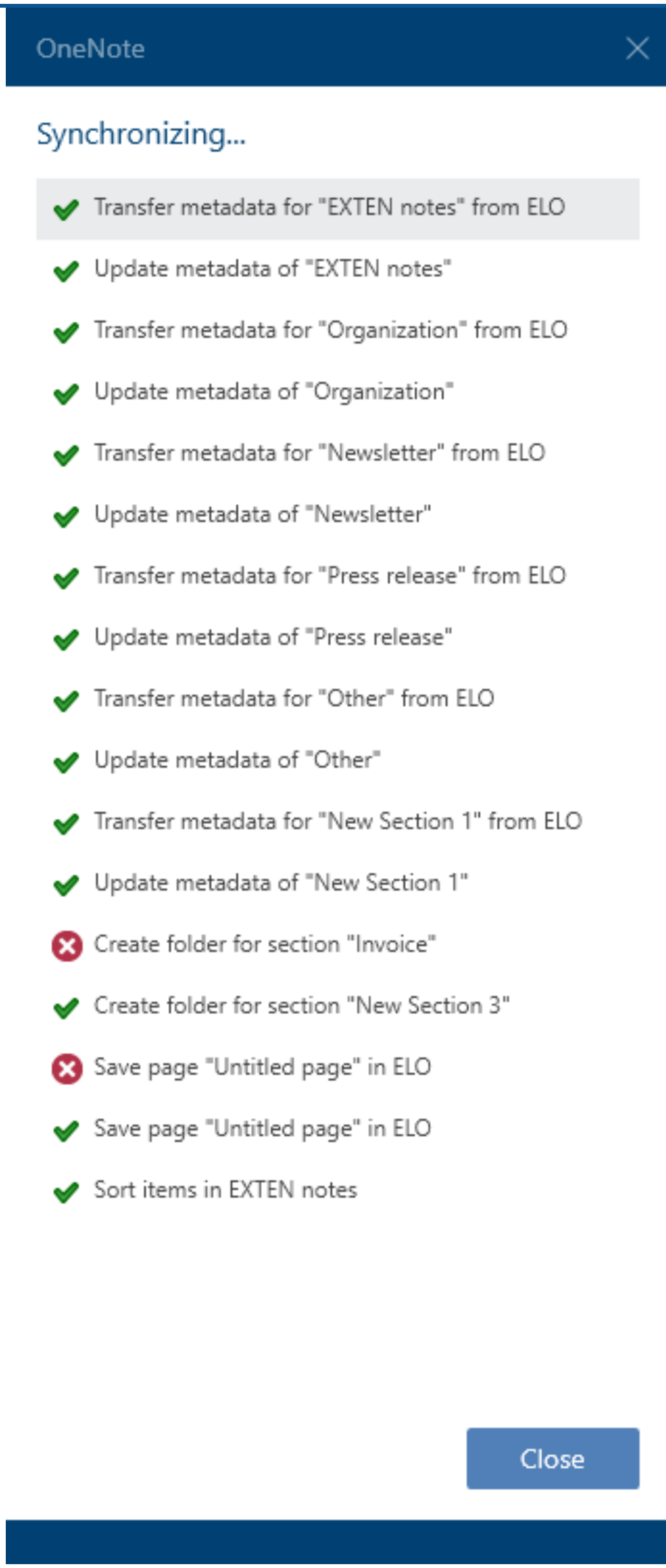
   You can select a metadata form in advance via *Configuration > OneNote*. The preferred form is then completed automatically when filing Microsoft OneNote items.

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

   If you've edited or created multiple sections and pages, a *Metadata* dialog box opens for each section and page. With pages, the *Version comment* dialog box also appears.

> **Information**
>
> This dialog box can be enabled or disabled in *Configuration > Dialog boxes > Version comment*.

The synchronized items are also listed for larger notebooks or in case of changes.



6. Close the list by selecting *Close*

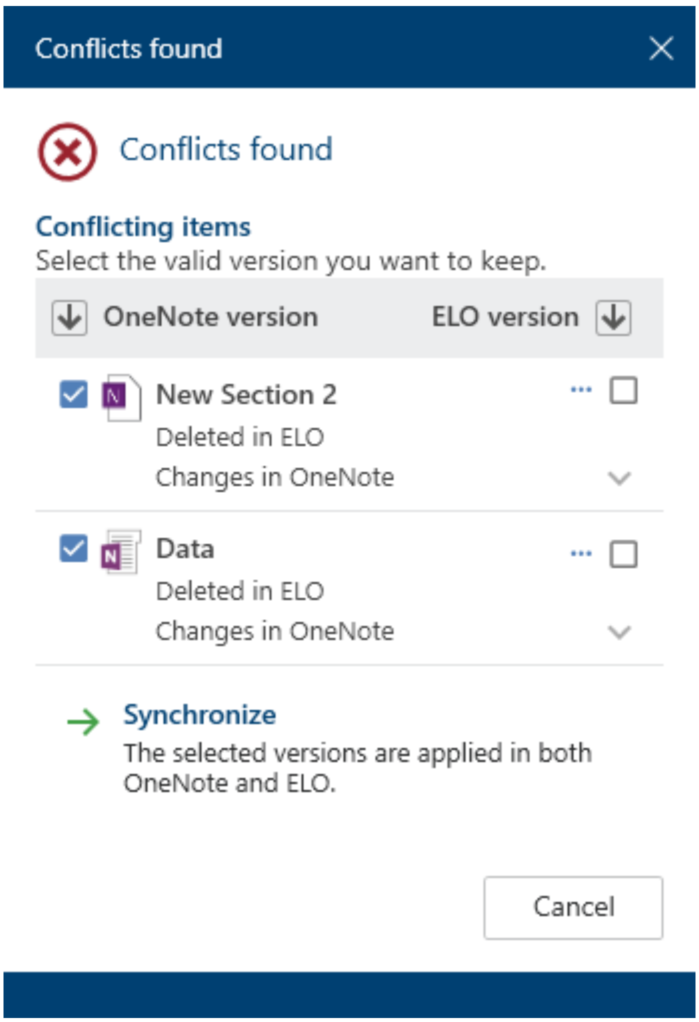
Result

Synchronization of the Microsoft OneNote items is completed.

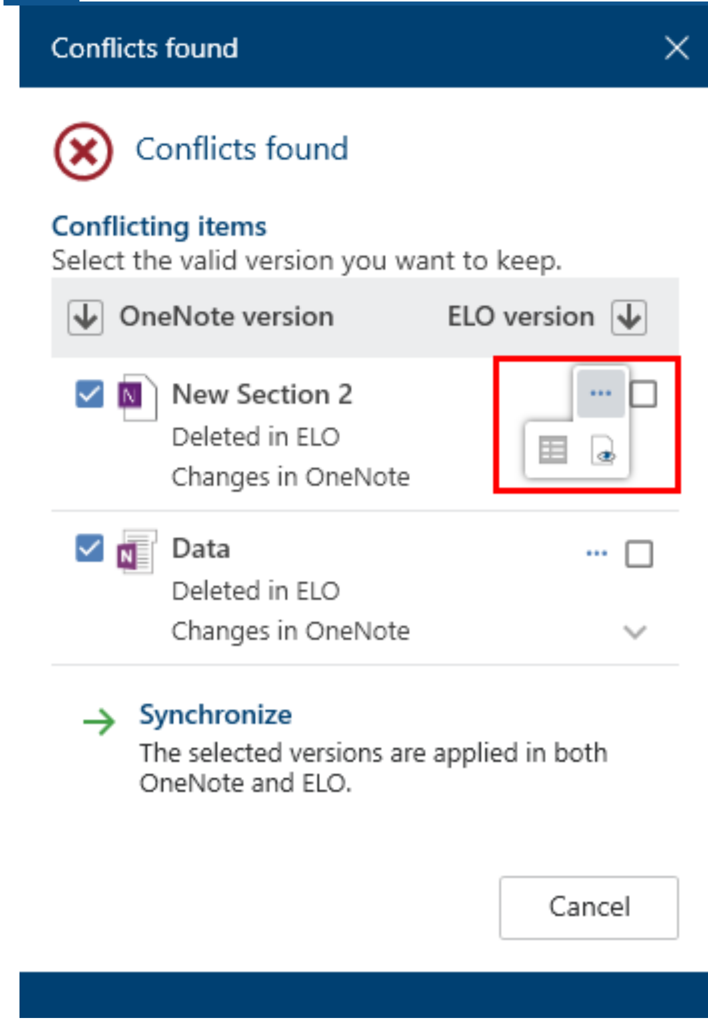
> **Please note**
>
> Moving pages in Microsoft OneNote results in them being deleted and re-filed to ELO. The feed and other data are then lost.
>
> So, first move the page in ELO and then synchronize the Microsoft OneNote item.

Conflicts

If you move items in Microsoft OneNote, conflicts may occur during synchronization with ELO.



The items causing the conflict are shown in the dialog box. Check the relevant box to indicate which item you want to keep – the version in Microsoft OneNote or the version in ELO.



Additional functions are available for conflicting items. You can access the following functions via *Additional functions (three dots)*:

- Open the metadata of the selected entry: A dialog box opens in which you can view and edit the fields in the metadata form.
- Open in read-only mode: Open the selected document in an external program for viewing.

Next, select *Synchronize*. Synchronization is then performed as described above.

Reference

You can create a reference for entries (folders or documents) that you need at multiple positions in the repository.

Unlike with moving, the entry remains at its original position. A reference is also created.

If you want to delete a document that has been referenced, ELO will notify you of this reference.

The following options are available for referencing entries:

- *Reference* function
-

Drag-and-drop

'Reference' function

Method

1. Select the entry you want to reference.
2. On the toolbar, select *Organize > Reference*.

   Keyboard shortcut: CTRL + R

   The entry is copied to the clipboard.
3. To select a target folder, select the corresponding folder in the tree structure.

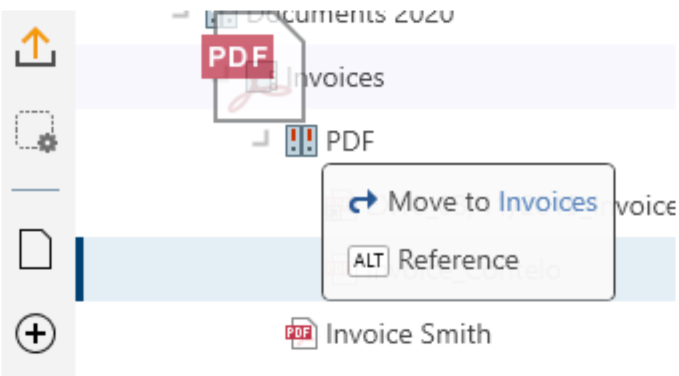
   If you selected the wrong folder, you can correct this by selecting the right folder. The folder selection is changed.
4. With the *Insert* function, you insert the reference in the target folder.

Drag-and-drop

Method

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

   Keyboard shortcut: Hold down the ALT key and release the mouse button on the item.



2. Press the ALT key to reference the entry.

Copy

You can copy entries (folders or documents) that you need at multiple positions in the repository.

Unlike with referencing, the two entries are not linked after copying. They can be edited separately from one another.

Method

1.

Select the entry you want to copy.

2. On the toolbar, select *Organize > Copy*. The entry is copied to the clipboard.

   Keyboard shortcut: CTRL + C

3. To select a target folder, select the corresponding folder in the tree structure.

   If you selected the wrong folder, you can correct this by selecting the right folder. The folder selection is changed.

4. With the *Insert* function (keyboard shortcut: CTRL + V), you insert the copied entry in the target folder.

Cut

You can cut entries (folders or documents) that you need at another position in the repository.

Unlike with copying, with the cut action, the entry is removed from the location where you cut it from.

Method

1. Select the entry you want to cut.

2. On the toolbar, select *Organize > Cut*.

   Keyboard shortcut: CTRL + X

3. To select a target folder, select the corresponding folder in the tree structure.

   If you selected the wrong folder, you can correct this by selecting the right folder. The folder selection is changed.

4. With the *Insert* function (keyboard shortcut: CTRL + V), you insert the cut entry in the target folder.

Insert

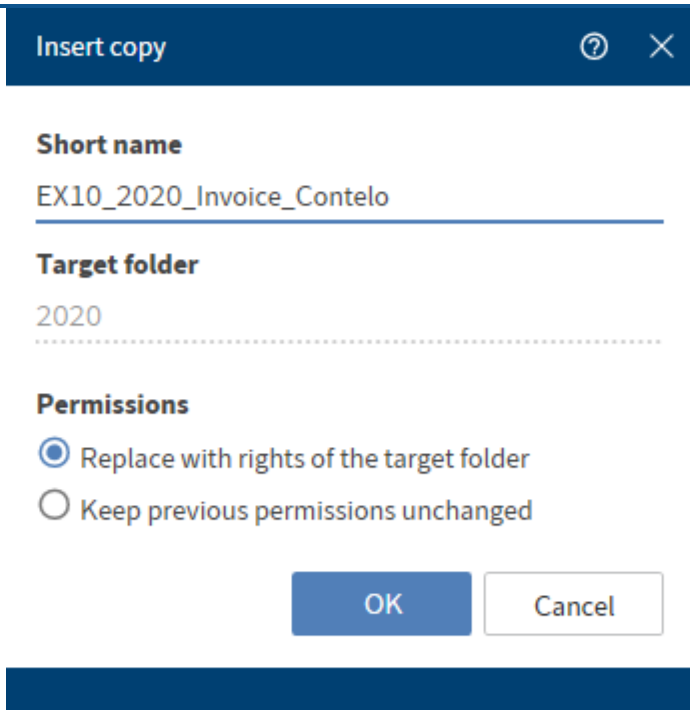
With the *Insert* function, you can insert a cut or copied entry at the selected location in ELO.

Method

1. Mark the position in ELO where you want to insert the copy.

2. On the toolbar, select *Organize > Insert*.

   Keyboard shortcut: CTRL + V



The *Insert copy* dialog box opens.

Optional: Change the *short name* as needed.

The selected folder where the copy is filed is shown in the *Target folder* field.

3. Under *Permissions*, determine whether the permissions should be replaced with those of the target folder or whether the previous permissions should remain in place.

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

Result

The copy is inserted at the desired location.

Information

In *Configuration > Display > Copy*, determine how ELO should behave when copying an entry into a folder with different permissions.

Delete

The *Delete* function (keyboard shortcut: DEL key) deletes the selected entry. A deletion marker is set in ELO and the entry is no longer displayed.

In *Configuration > Display*, you can set whether all deleted entries are shown in the tree until you log off. Documents with a deletion marker are indicated by a recycle bin icon and are grayed out in ELO.

Important

It is not possible to delete an entry permanently in the ELO Desktop Client. Deleted entries have to be removed from ELO permanently by an administrator. They can be restored until the point at which they are permanently deleted.

Restore

With this function, you can restore entries with a deletion marker.

To make deleted entries visible, check the box in *Configuration > Display > Show deleted entries until next logoff*. Entries with a deletion marker are indicated by a recycle bin icon and are grayed out in ELO. Selecting *Restore* restores the selected entry and all child entries. This option is only possible if the entry has not been deleted permanently.

Remove lock

If a user has checked out an entry, it is locked and cannot be edited by other users. With this function, you can unlock the selected entries.

Information

You can only remove your own locks.

Assign control

Available in: *Desktop* work area

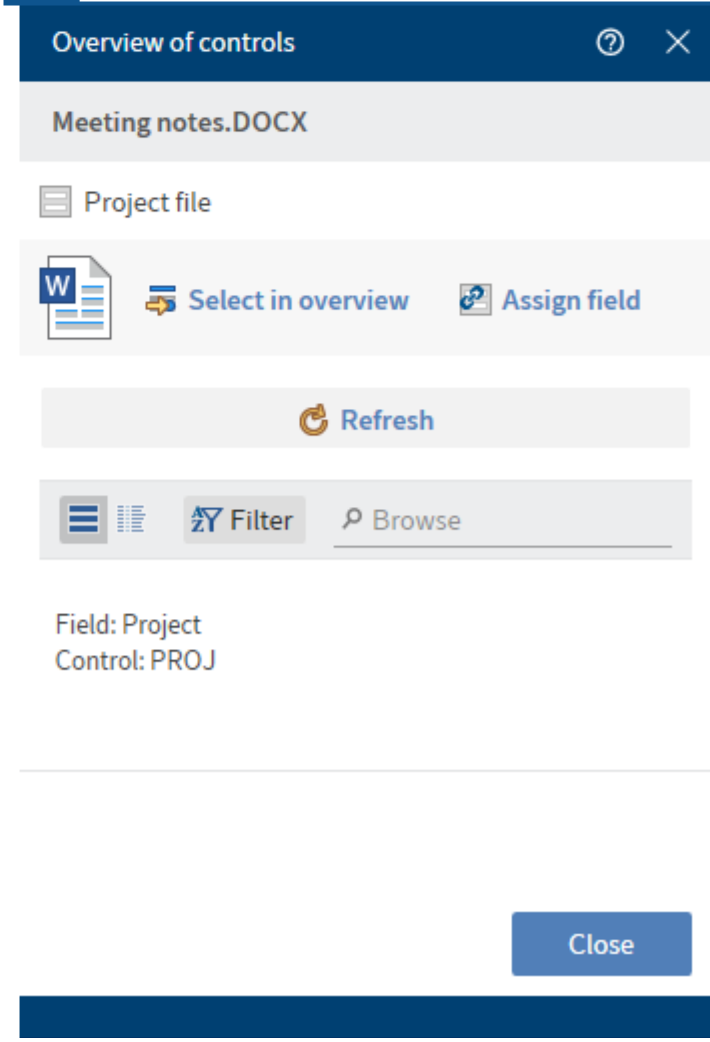
The *Assign control* function allows you to assign the selected control from a Microsoft Word form field to a field in the ELO metadata. The *Assign field* dialog box opens. The content control properties are then transferred to the field on filing.

For more information on the *Assign control* function, refer to the Important actions in detail chapter.

Overview of controls

Available in: *Desktop* work area

The *Overview of controls* function shows which metadata form is assigned to the document and which controls have been assigned to fields.



Select in overview: The active control in Microsoft Word is brought into focus in the overview.

Assign field: Assign the active control in Microsoft Word to a field. The *Assign field* dialog box opens.

Refresh: The controls in Microsoft Word are reloaded.

You can view the overview either in list or table format. 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.

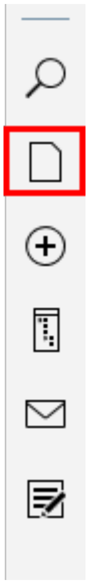
You can show the control assigned to each list entry by selecting the arrow button.

You can change the existing assignment by selecting the chain icon. The *Assign field* dialog box opens.

An error message is displayed in the following cases:

- No assignment available
- Field was assigned multiple times
- No corresponding field in the metadata form

'Document' group



The following functions are available in the *Document* group.

> **Information**
>
> Not every function in the *Document* group can be used in every work area. In this case, the relevant function is grayed out.

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

Check out to OneDrive

Use this function to check out a Microsoft Office document in ELO to Microsoft OneDrive for editing. The document is stored in your OneDrive folder until you check it back into ELO.

This function is only available if you have a Microsoft school or work account with Microsoft OneDrive for Business that has been activated for ELO by an administrator.

> **Please note**
>
> You can only use this function to edit documents with standard file formats such as *DOCX*. The document size is limited to 4 MB.
>
> For documents with older file formats like *DOC*, use the *Check out and edit* function.

Related function

- Check out and edit: The *Check out and edit* function opens a selected document for editing in an external program.

Method

1. Select the document you want to edit.
2. On the toolbar, select *Document > Check out to OneDrive*.

Result

The Microsoft Office document is opened for editing in a new browser tab.

While you are editing the document, it has the status *Checked out* for other users.

Changes to the document are automatically saved in Microsoft OneDrive.

For explanations of the document synchronization status icons, see the Microsoft documentation What do the OneDrive icons mean?

Other options:

- Edit in the desktop app
- Edit collaboratively: You can invite other users to edit the document collaboratively. These users do not need an ELO account for this, but they must have a Microsoft account. For more information, refer to the Microsoft documentation Share OneDrive files and folders.

> **Please note**
>
> You cannot check the document back into ELO until all users who are editing the document have closed it.

Outlook

To save a new document version in ELO, close the document and select *Document > Check in* in the ELO toolbar.

If you want to continue editing the document at some point without checking it in, you can always open it from the following folder: *OneDrive - <your company name> > Apps > <name of target folder>*.

> **Please note**
>
> You may not be able to check a document in if you are editing it in the Firefox browser and use the uBlock Origin ad blocker extension. In this case, disable the extension or switch it off for the relevant page.

Check out and edit

With the *Check out and edit* function (keyboard shortcut: ALT + O), you can open a document for editing in an external program. The document is transferred to the *In use* work area and cannot be edited by other users. In ELO, the checked out document is marked with a yellow arrow.

In the chapter *Important actions in detail*, refer to the section Check out and edit document for more information.

Edit document

With the *Edit document* function (keyboard shortcut: CTRL + E), you can edit the selected, checked out document. This function is required when you want to edit a checked out document but the associated editing program is not open. Save the changes as usual in your editing program.

Check in

To transfer the changed document to ELO, select it in the list of documents checked out for editing, then select *Document > Check in* (keyboard shortcut: ALT+ I) on the toolbar.

If you did not make any changes to the document after checking it out, you have two options:

- Cancel editing: The document lock is removed. The original version of the document remains in ELO.
- File as new version anyway: A new but unchanged version of the document will be filed.

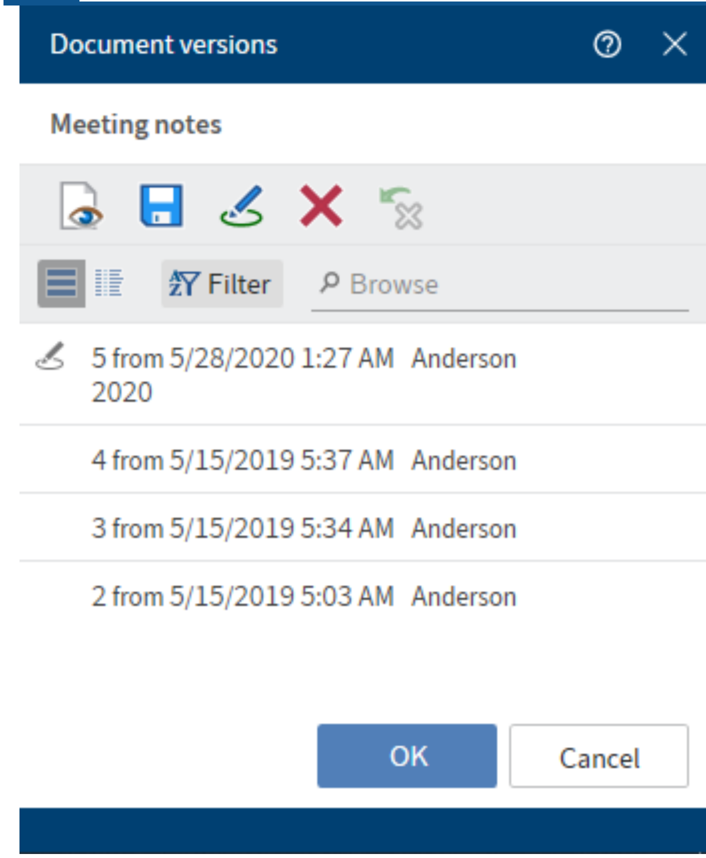
In the chapter *Important actions in detail*, refer to the section Check in document for more information.

Discard document changes

This function discards all changes to the selected, checked out document. The original document remains unchanged and can once again be edited by other users.

Document versions

You can also view an overview of all versions of the selected document in the *Document versions* dialog box. You can view, save, and delete old versions.



The buttons below the display name provide various options:

 Open in read-only mode (eye icon): The selected version is opened in an external default application in read-only mode.

 Save as (floppy disk icon): The selected version is saved to the file system. Select the path in the dialog box.

 Set as working version (pencil icon): This option sets the selected version as the new working version. The newly selected version is now shown in the *Repository* work area.

 Delete (X icon): The selected version is assigned a deletion marker.

 Restore (X icon with green arrow): The version with a deletion marker is restored.

There are also buttons that allow you to manage the list of document versions.

You can view the document versions in a table or list form. Select the view via the corresponding button. By selecting *Filter*, you can sort, group, and filter to narrow down what's shown. The search field next to the magnifying glass icon also allows you to narrow down the results with its *search-as-you-type* function.

Load new version

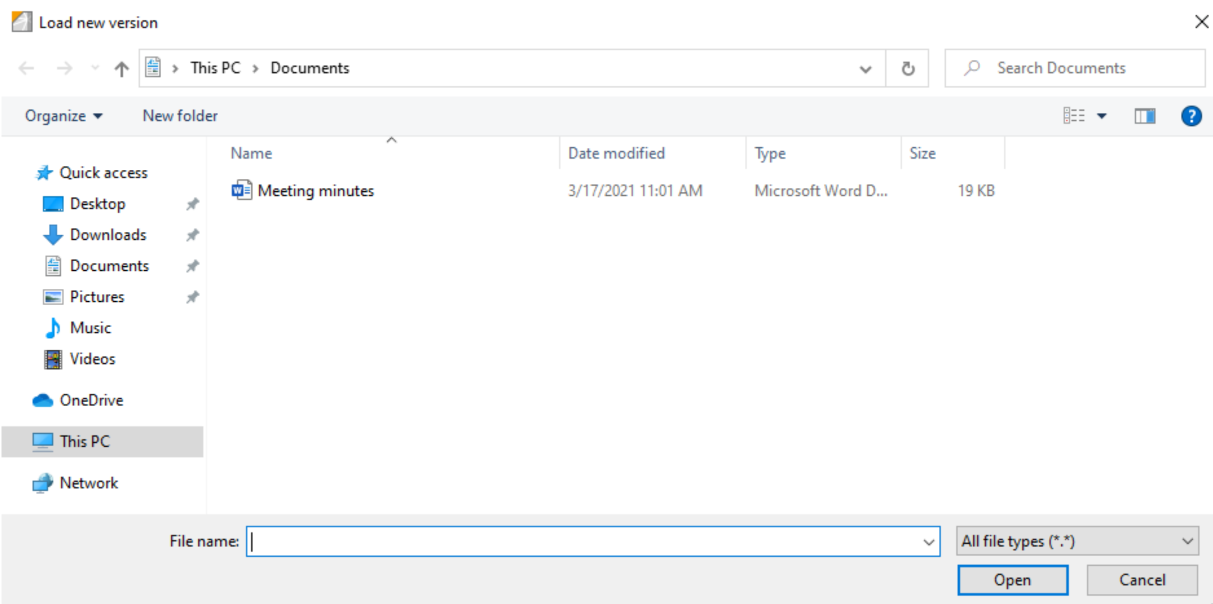
This function files a document from your file system as a new version of the selected document in ELO.

Related function

- Drag-and-drop

Method

1. In ELO, select the document you want to upload a new version of.
2. On the toolbar, select *Document > Load new version*.



A window for selecting the file from the file system opens.

3. Select the file and then select *Open*.

   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*.

   Using this option on version-controlled documents creates a new entry in the version history and makes this new version the current working version. For documents that are not version controlled, the previous version is overwritten.

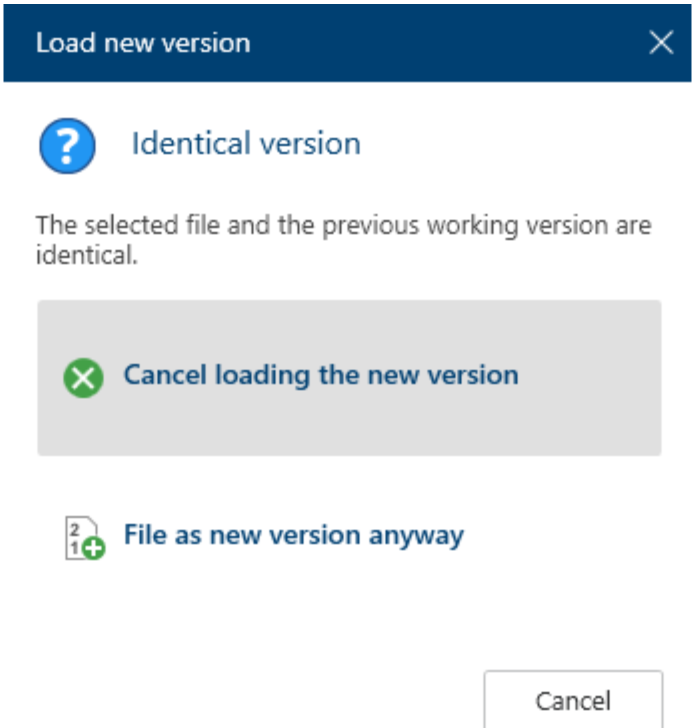
4. Select *OK* to close the dialog box.

Result

The version you filed is the new working version.

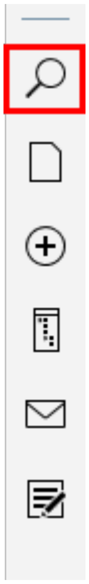
Outlook

Uploading an identical version with this function opens a dialog box asking what you want to do with the file.



You can cancel loading the new version or file it as a new version anyway.

'Search' group



The following functions are available in the *Search* group.

> **Information**
>
> The *Search* group is only active in the *Search* work area.

Set as default

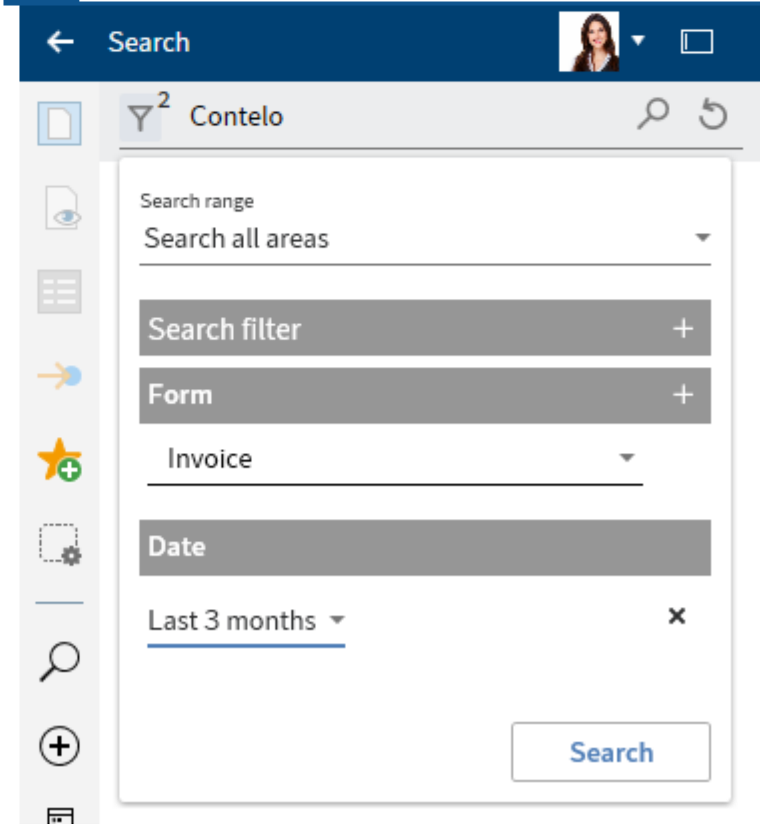
Use the *Set as default* function to save your current search settings as the default. The default is restored when you reset the search.

Add search favorite

The *Add search favorite* function saves the current search settings as a favorite. The search term, any filters, and the selected areas are saved.

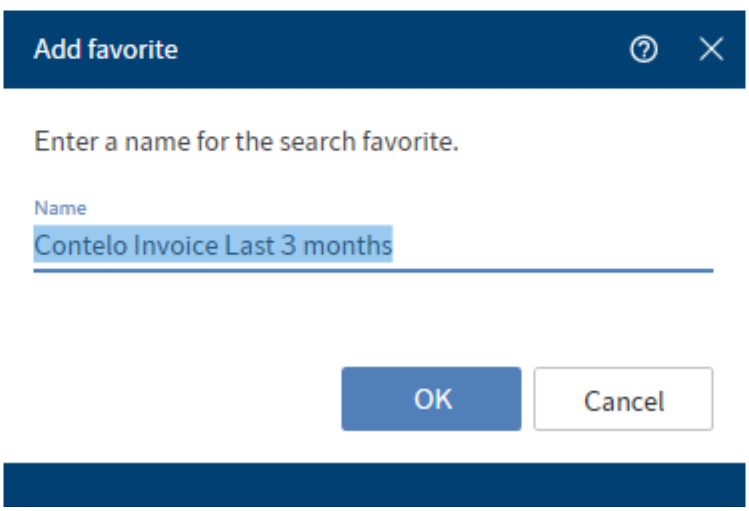
Example

The search favorite should include the search term *Contelo*, the form filter *Invoice*, and the date filter *Last 3 month*.



Method

1. Set the desired search options.
2. On the toolbar, select *Search > Add search favorite*.

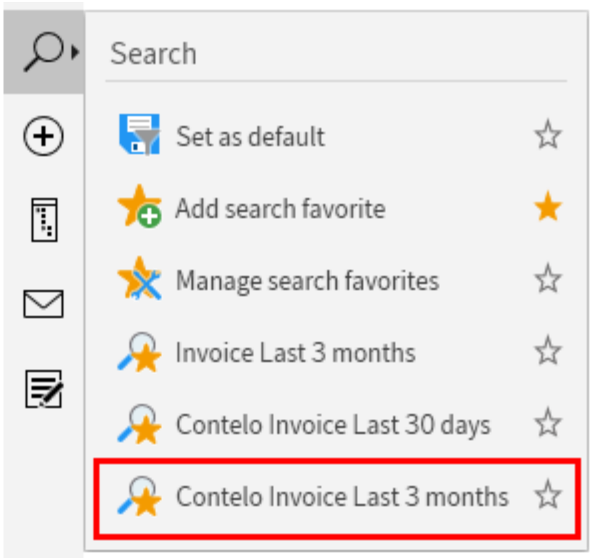


The *Add favorite* dialog box appears.

3. Change the name for the search favorite if necessary.
4. Select *OK* to close the dialog box.

Result

The search favorite is saved.

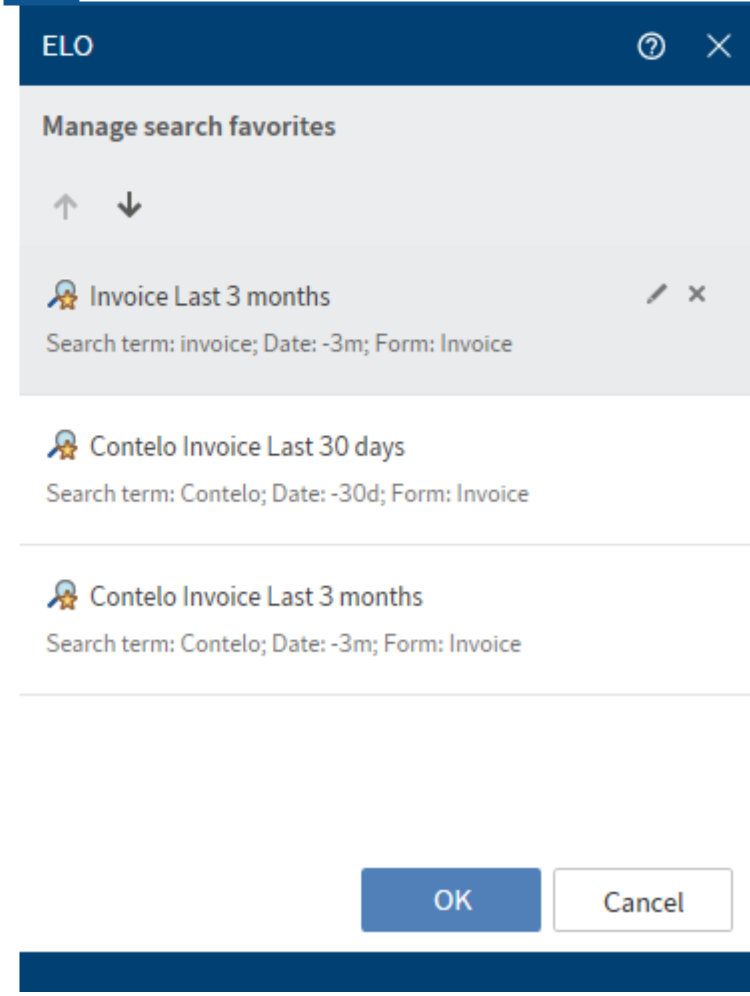


The new search favorite appears in the toolbar in the *Search* group and can optionally be added to the favorites bar by selecting the star icon.

> **Information**
>
> Search favorites that you create in the ELO Desktop Client are not available in other clients. However, search favorites created in the ELO Java Client are shown in the ELO Desktop Client.

Manage search favorites

With the *Manage search favorites* function, you can sort, rename, and delete your search favorites.



Move the search favorites up or down using the arrow icons.

To rename a search favorite, select the pencil icon.

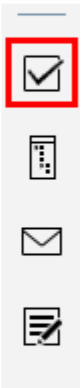
To remove a search favorite, select the delete icon.

Select *Save* to save the changes.

'Tasks' group (only ELO Desktop Client Plus)

Information

You can only access the *Tasks* group with ELO Desktop Client Plus.



The following functions are available in this group.

Information

The *Tasks* group is only active in the *Tasks* work area.

Forward workflow

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

With the *Forward workflow* function (keyboard shortcut: ENTER key), you forward the selected workflow to the next responsible user. This ends your own workflow task.

You will find more information in the section Process workflow in the chapter *ELO Desktop Client Plus*.

Accept workflow

With the *Accept workflow* function, you accept a workflow node that was assigned to a group. The workflow is no longer displayed in the *Tasks* work areas of the other group members. This prevents the workflow from being processed by multiple users at once.

Use the *Return workflow* function to undo this action.

You will find more information in the section Process workflow in the chapter *ELO Desktop Client Plus*.

Return workflow

Use this function to return a workflow to the group that was originally assigned the workflow.

You will find more information in the section Process workflow in the chapter *ELO Desktop Client Plus*.

Delegate workflow

With the *Delegate workflow* function, you delegate your workflow step to other users or groups.

You will find more information in the section Process workflow in the chapter *ELO Desktop Client Plus*.

Edit reminder

Use the *Edit reminder* function to edit an existing reminder after it has been created. You can view and edit the current settings.

You will find more information in the section Process workflow in the chapter *ELO Desktop Client Plus*.

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.

ELO Desktop Client Plus

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

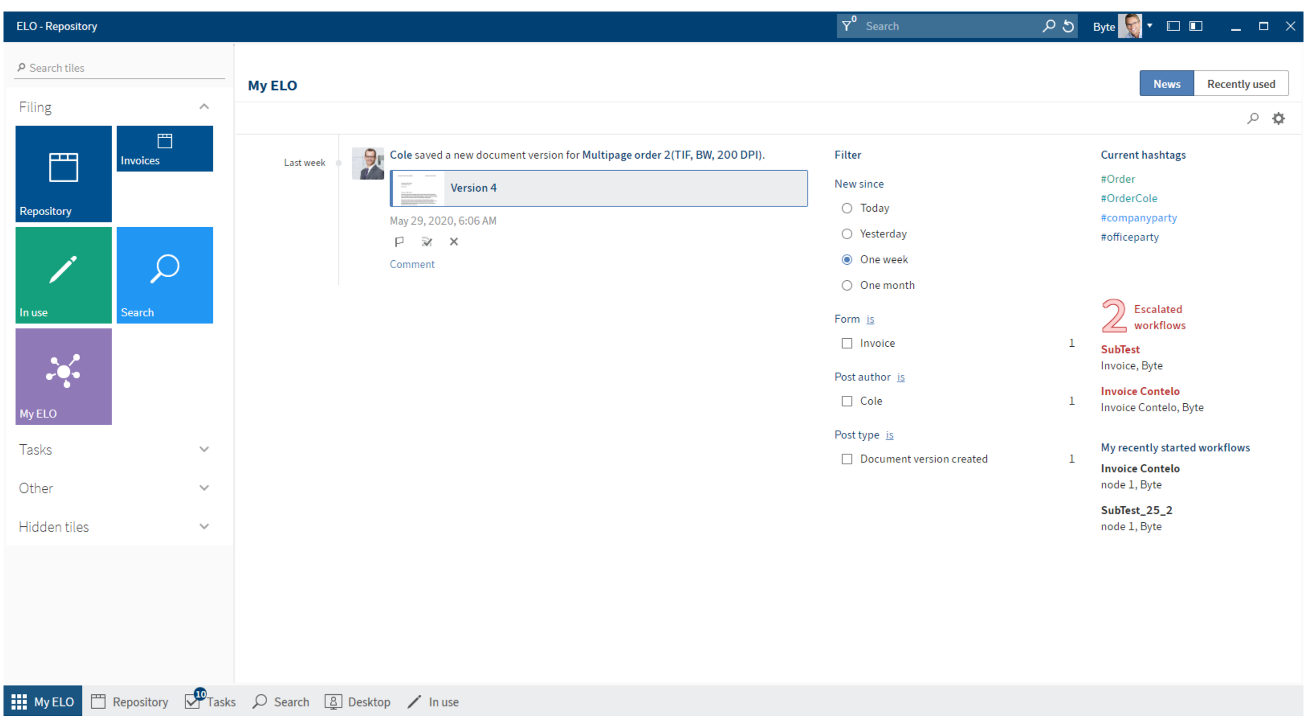
This enhanced version contains all functions of the ELO Desktop Client. In addition to the default and lean views, a full-screen mode is also available.

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.



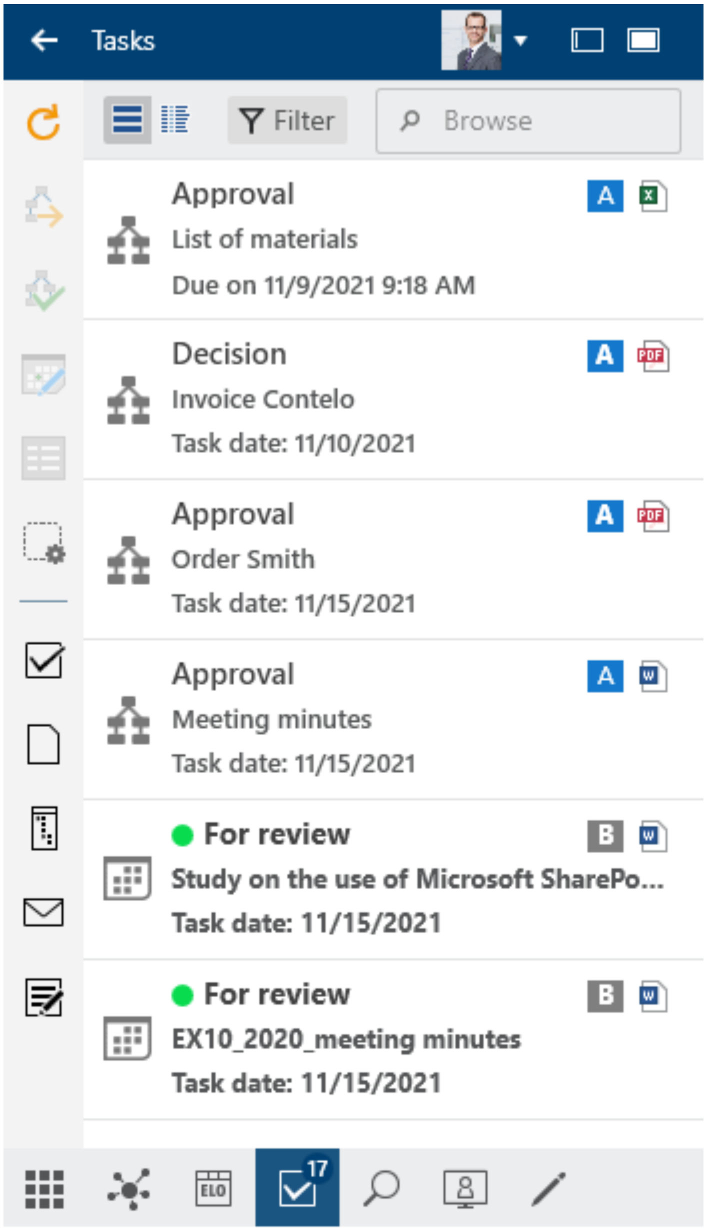
The home screen connects the tile navigation with the *My ELO* work area.

'Tasks' work area

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 the keyboard shortcut CTRL + 4.

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



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.

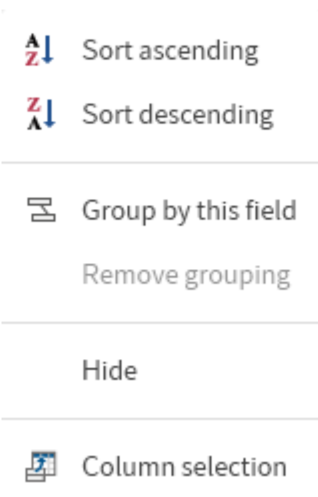
The following types of tasks are available; you can distinguish them by their icon:

Workflows	Workflow icon	
Reminders	Calendar icon	
Monitoring entries	Camera icon	

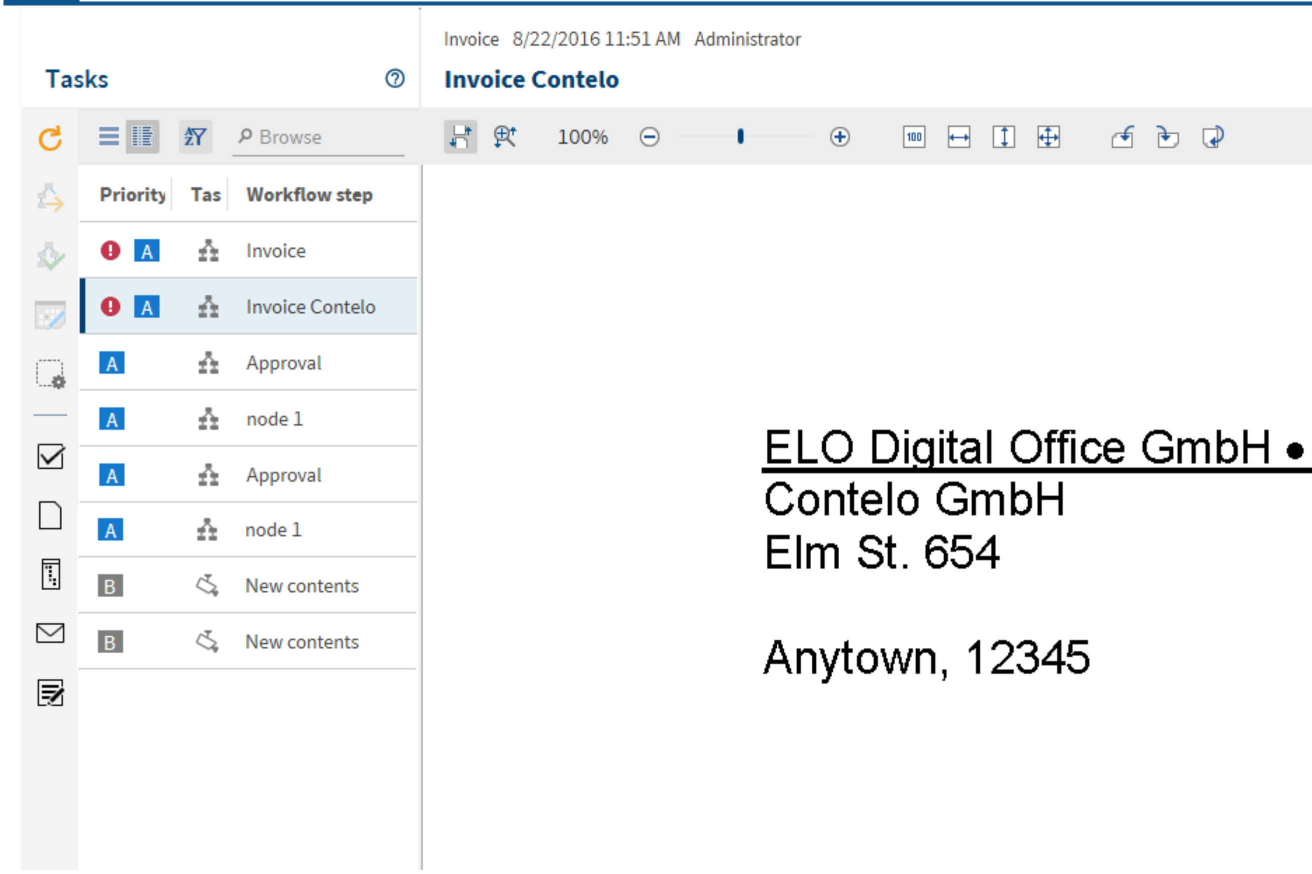
The tasks are sorted according to their priority: A (high), B (medium), and C (low). Overdue tasks are denoted with a red icon with a white exclamation mark. New entries are shown with a green dot.

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).



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



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*).

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.

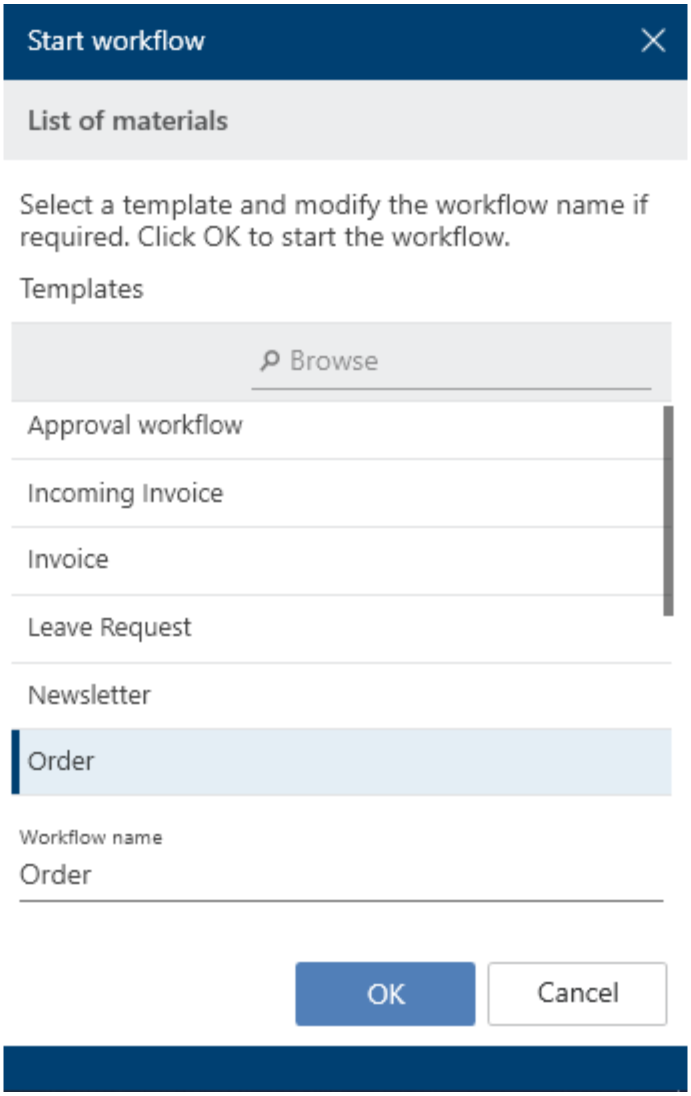
Method

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*.



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*.

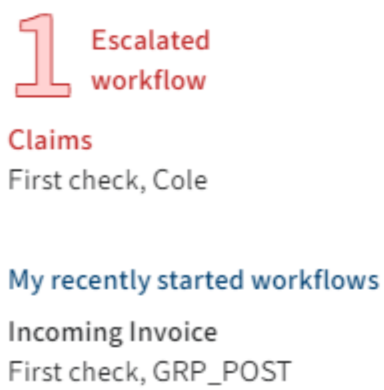
Result

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.



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.

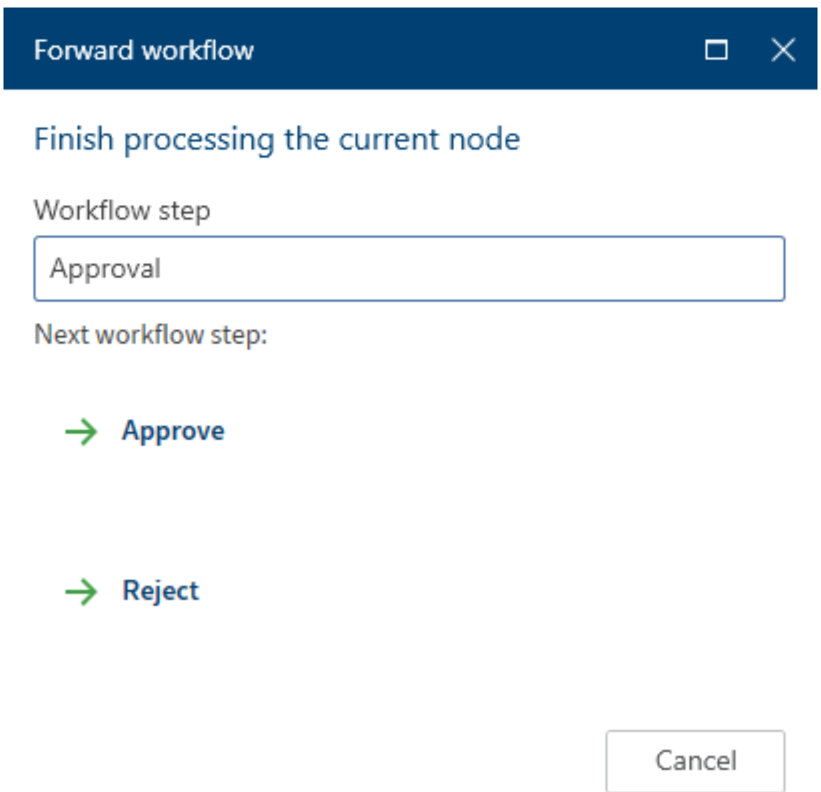
Related functions

- 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*.



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.

'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

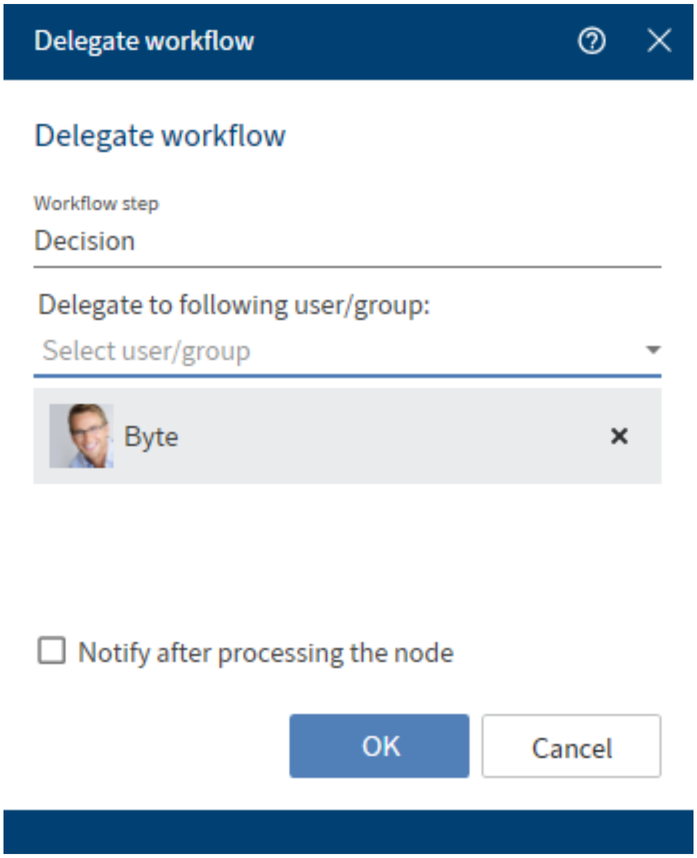
You can delegate your workflow step.

Related function

- Return workflow

Method

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



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.

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.

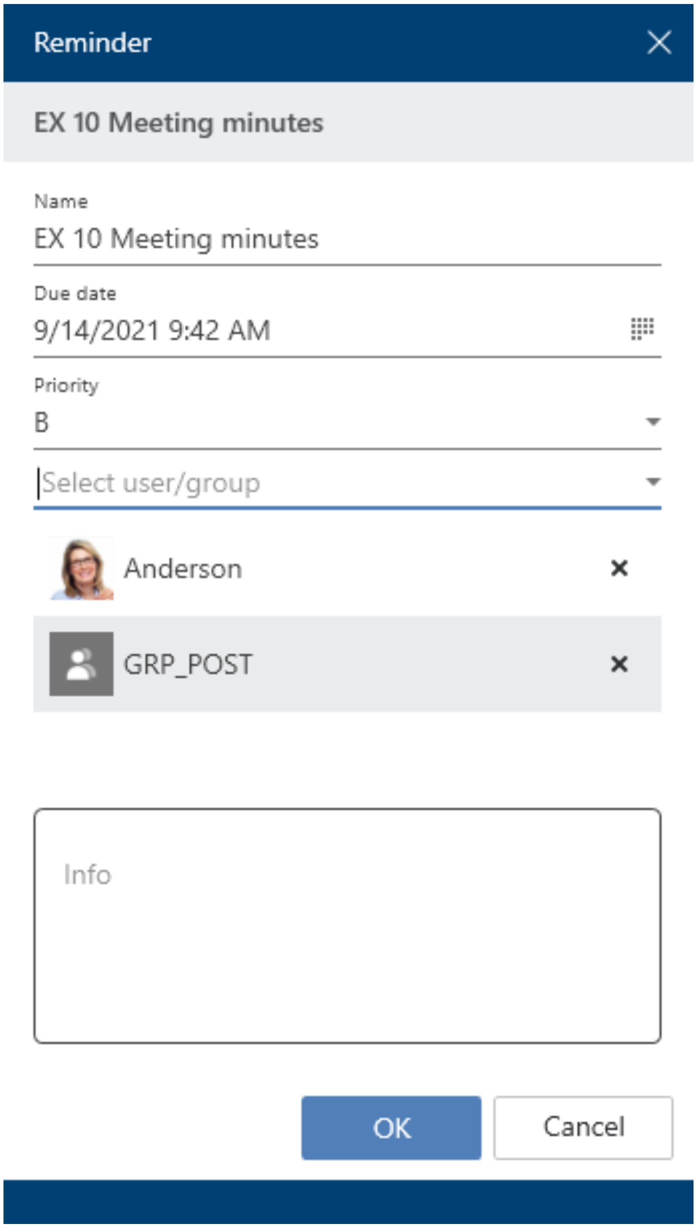
Method

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*.



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*.

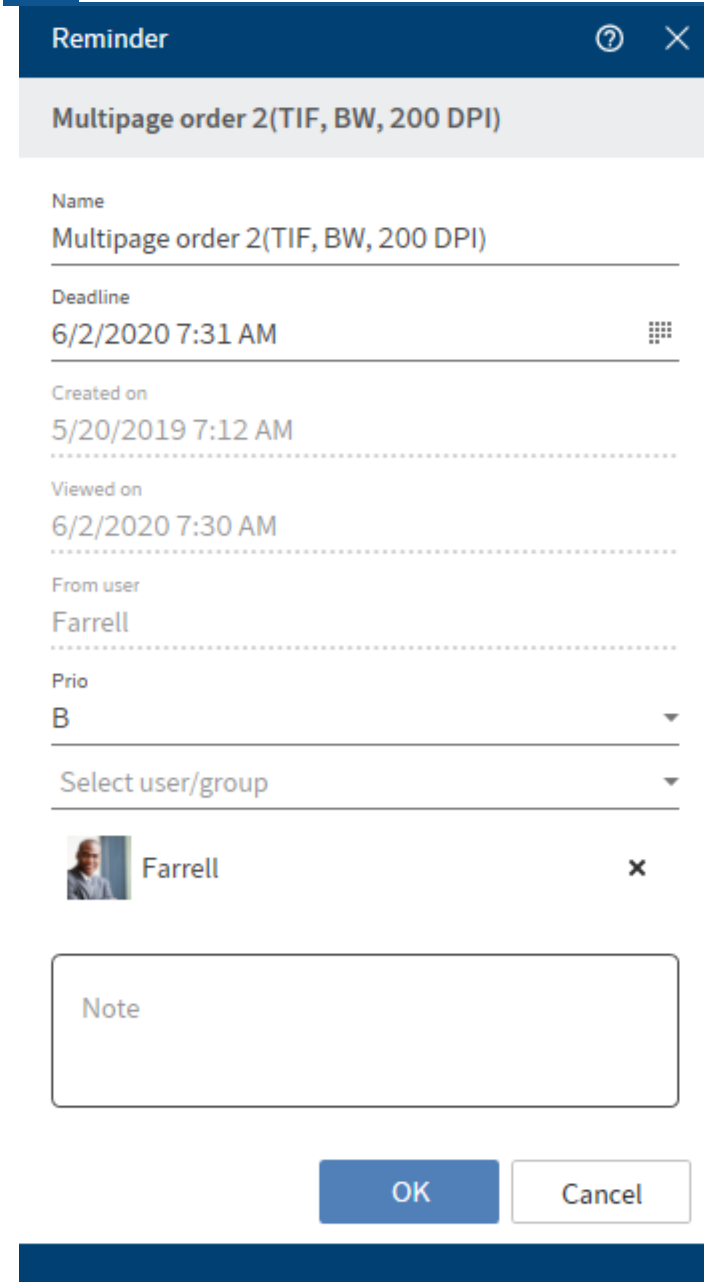
Edit reminder

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.



- 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.