



# **ELO Essentials**

Basics



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## Introduction

### What is ELO?

With ELO, you can manage, search for, and find documents. In addition, you can use ELO to create workflows and reminders, and to view documents.

### Target audience

This short manual for ELO Java Client and ELO Web Client is aimed at users without administrator rights.

Administrators can use the [ELO Java Client administration\(English\)](#) and [ELO Web Client administration \(English\)](#) manuals.

### Operating system

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

The ELO Java Client can also be used on other operating systems provided a corresponding Java environment is available for the operating system.

## Start ELO

### ELO Java Client

Method

1. Open ELO via the icon on the desktop.

Alternative: Run the *EloClient.exe* file in the program directory of the client.

The logon dialog box appears.

2. Enter your ELO account name and password.

Optional: To select a specific repository or to change the language in ELO, enable *Show logon options*.

#### Information

The repositories that you can select are defined by your administrator.

3. Select *LOG ON*.

Result

ELO opens.

### **Error message**

If ELO does not start, an error message will appear.

Internal errors are displayed in yellow. In this case, you either entered the wrong password or the account has been locked. Enter your logon information again. If the account is locked, contact your administrator.

External errors are displayed in red. In this case, there is an issue with the server connection. Contact your administrator.

### **ELO Web Client**

To start ELO, enter the URL in your browser.

Enter your logon credentials. If you have been given a temporary password to log on with, change it during the first session using the *Change password* function.

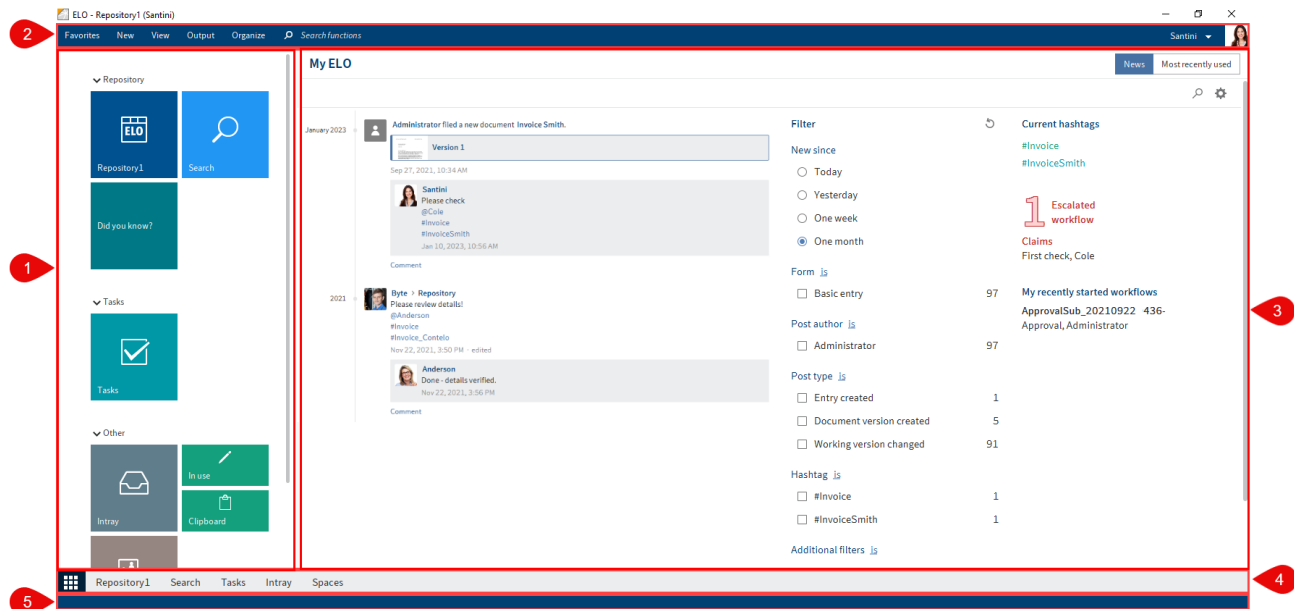
#### **Information**

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

Save selection and don't ask again: If you save your selection, you can enable the roles again under *User menu [your name] > Enable roles*.

## Program interface

The ELO clients start in the *My ELO* work area. The areas are described briefly in the following using the ELO Java Client. For more information on the ELO Web Client program interface, refer to the [English user documentation](#).



1 Tile navigation: This area is for navigating the program. The tiles take you to work areas or to selected functions.

2 Ribbon: On the ribbon, you will find the functions available to you.

3 News: The *News* area helps you to keep track of developments in ELO.

4 Navigation bar: Navigate between the work areas using the navigation bar.

5 Status bar: The status bar contains information on the currently selected entry or area. This includes the number of available entries or the repository path.

### What is a work area?

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

- My ELO: This work area is on the home screen when you start the program. Tiles on the left-hand side provide access to the main areas in ELO.
- Repository: This area contains all folders and documents that you are authorized to access. This is also where you create additional folders and documents.
- Search: This area is where you search for folders and documents that are stored in the *Repository* work area.
-

Tasks: If you are assigned tasks, you will find them here. Tasks are always related to entries (folders or documents) in the *Repository* work area.

- In tray (only ELO Java Client): The In tray is the central work area for incoming documents. You can store documents in ELO via the In tray.
- Clipboard: You can copy frequently used folders and documents from the *Repository* work area to the Clipboard. This enables you to quickly find the entries you need frequently or are currently working on.
- In use: When you edit a document, it automatically appears in the *In use* work area. Editing a document means that you have checked it out using the *Check out* function.

## My ELO

The *My ELO* work area is on the home screen when you open ELO. Tiles on the left-hand side provide access to the main areas in ELO.

### Tile navigation

The tile navigation contains all available tiles. Tiles can be used to represent work areas, views, search favorites, and ELO apps. Clicking a tile takes you straight to the corresponding area.

You can create new tiles for folder and task views. Use the function *New view* (available in: *Ribbon > View*).

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

You can find more information about tile settings in the Create tiles chapter.

### News

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. You will also find an overview of your workflows, active substitutions, and current hashtags.

#### Information

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

### Most recently used

The *Most recently used* area contains a list of documents that you recently viewed or edited. Select an entry to go to the filing location.

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

#### Information

You can set the maximum number of entries shown in the configuration (*Display > General* area).

## Repository

You will find all folders and documents created in ELO in the *Repository* work area.

The *Repository* is divided into the following areas:

Repository structure (left section): Overview of entries (folders or documents)

Viewer pane: View of entries selected in the tree (folders or documents)

You can change the layout of the repository structure and create view profiles for the viewer pane. For more information, refer to the chapters *Repository structure* and *Viewer pane*.

## Search

In the *Search* work area, you can search through folders and documents in the *Repository* work area. You can use search filters for this and create search favorites.

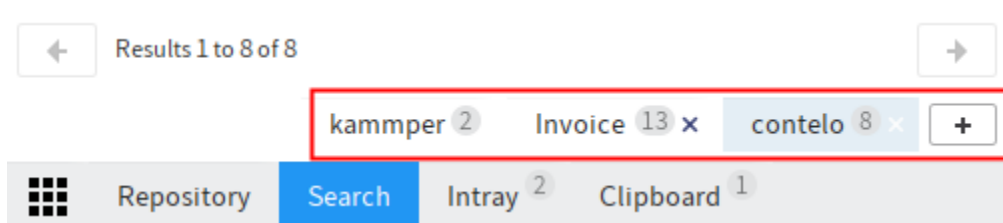
When you open the *Search* work area, the *Search* tab appears. Using the functions on the *Search* tab, you can narrow down and continue your search.

### Information

The chapter *Search* entries explains how to run a search, narrow down the results, and view the hits.

### Create search view

If you use the *New view* function (plus icon at the end of the search results list) in the *Search* work area, you create a temporary search view.



A search view is used to temporarily save search results and search settings. Search views appear in a bar on top of the navigation bar.

### Please note





These search views are deleted when you close ELO. If you want to save a search request, use the *Save search* function (in the *Search* work area > *Ribbon* > *Search* > *Search favorites*).

## Tasks

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

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

### Icon Meaning

-  Workflows (workflow icon)
-  Workflows with form (form icon)
-  Reminders (calendar icon)
-  Monitoring (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 unread tasks are denoted with a green dot. You can mark a task as unread via the context menu (right-click).

### Information

With the default settings, you can't mark group and substitution tasks as read. However, you can enable this option under *Configuration* > *Display* > *Task list display options* > *Mark group task as read*.

In the configuration, you can specify how many days in advance tasks should be shown in the task list (*Display* > *Task list display options* area).

To filter the list by specific criteria, select the triangle icon next to the column title.

### Tasks

Priority	Type	V
A	all	Qt
A	Custom...	
A	Workflow	nc
A	Form	
A	Reminder	Zt



You can create a filtered view for tasks. For example, you can only show reminders or tasks with expired deadlines. Use the function *New view* (available in: *Ribbon > View*).

Select an entry to view its contents.

For workflows with forms, you will find the form on the *Form* tab. You can edit and forward it here.

Tasks disappear from your Tasks work area in the following ways:

- Workflows:
  - Actively: You forward the workflow using the form or the function (*Ribbon > Tasks > 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 task (*Ribbon > Organize > Delete*).

You will find more information here:

- Start workflow
- Forward workflow
- Create reminder
- Monitor entry

## Clipboard

The *Clipboard* work area is where you can temporarily store documents and folders. You can also create a favorites list here.

To place an entry on the Clipboard, select it and, on the ribbon, select *View > Navigation > Copy to Clipboard*. Alternatively, you can also drag entries to the Clipboard.

You can edit entries on the Clipboard in the same way as entries in the *Repository* work area. The changes are applied to the *Repository* work area.

Navigation and display are the same as in the 'Repository' work area.

### Please note

The documents on the Clipboard are still in the *Repository* work area. They are displayed additionally in the *Clipboard* work area. The *Delete* function in the *Clipboard* work area has the same effect as in the *Repository* work area, i.e. the document is removed from the *Repository* work area.

An entry remains in the *Clipboard* work area until you remove it (*Ribbon > View > Remove from Clipboard*).

## In use

The *In use* work area shows you all the documents you have checked out for editing. The *Edit entries* chapter explains how to check out and edit entries.

Navigation and display are the same as in the *Repository* work area.

Entries in the *In use* work area are locked for all other users. The editor who currently has the entry checked out is displayed in square brackets in the *Repository* work area.

Once you check an entry back in or cancel editing, it automatically disappears from the *In use* work area.

## Intray

### Information

This work area is only available in the ELO Java Client.

The *Intray* is the central work area for incoming documents. You can drag any document into the *Intray* work area and file it to ELO from there.

Before you file documents to ELO from the *Intray* work area, you need to enter metadata for the documents. You can also apply metadata automatically. Alternatively, you can specify the filing location in a dialog box every time you file a document.

You will find the scan functions in the *Intray* work area. Scanning is an important medium for filing documents to ELO.

When you open the *Intray*, the *File* tab appears on the ribbon. This contains functions for scanning, inserting, organizing, filing, and applying metadata to entries.

### Please note

Documents in the *Intray* work area are not yet stored in ELO. They are located in a special directory on your local computer. If you use ELO on different computers, the content of the *Intray* work area differs from computer to computer. You cannot access documents in the *Intray* work area of another computer.

You will find more information here:

- File entries via the Intray
- [ELO Java Client \(English\)](#) user documentation

## Spaces

### Information

Spaces are available from ELO 23.

Spaces are areas where you can collaborate with other users. You can file new entries and work on them with members of the space.

Workspaces are work areas in ELO for different functional levels. With the help of filters and different views, you can edit data and analyze it in charts and tables.

The *Teamspace* function enables you to collaborate across teams. All teamspace members can gather and edit documents together and exchange information using the feed.

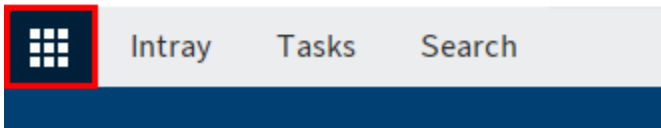
You can find the spaces in the *My ELO* work area via the *Spaces* tile. In this area, you see all spaces that you are a member of.

You can find more information in the [ELO Java Client \(English\)](#) and [ELO Web Client \(English\)](#) user documentation.

### 'My ELO' button



> Hidden tiles



Use the *My ELO* button to open the *My ELO* work area. The *My ELO* button (tile icon) is locked in the navigation bar and cannot be removed from it.

Here, you will find your news and most recently used entries, as well as the tile navigation.

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

You can find more information in the *My ELO* chapter.

### Ribbon

You can launch functions from the ribbon.

#### Information

Some functions can also be run from the context menu (right-click).

You can find out what you can adjust in the ribbon in the *Customize the ribbon* chapter.

## Tabs

The ribbon is organized into tabs. Some tabs are always shown (default tabs), while others only appear when the tab functions can be used (contextual tabs).

The default tabs are:

- Favorites: With the default settings, this tab contains several important functions. You can add other functions.
- New
- View
- Output
- Organize

The contextual tabs are:

- Document: When selecting a document
- Task: When selecting the *Tasks* work area
- Search: When selecting the *Search* work area
- File (only in ELO Java Client): When selecting the *Intray* work area
- Copy/Paste: When selecting the *Copy* function
- Reference: When selecting the *Reference* function
- Move: When selecting the *Move* function
- Attach pages (only in ELO Java Client): When selecting the *Attach pages* function
- Clipboard (only in ELO Web Client): When selecting the *Copy*, *Reference*, or *Move* functions

## Functions

The functions are arranged logically by relation. The most important functions are pinned to the ribbon. Others can be found in drop-down menus. If a function is grayed out, you cannot use it at your current position in ELO.

### Search functions

Use this field to search for functions on the ribbon. Selecting a function in the results list executes the function.

### User menu [your name]

You will find the user menu under your name on the ribbon. The user menu provides access to the configuration where you can edit your profile or appoint a substitute, for example. You can also log off at the end of your session here.

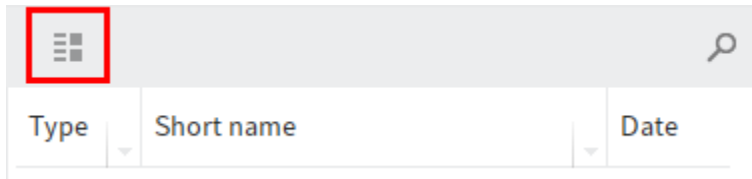
### Navigation bar

The navigation bar provides quick access to several areas and shows you which area you are currently in.

Hold down and drag with the left mouse button to move the individual areas on the navigation bar.

You can pin all areas available as tiles in *My ELO* to the navigation bar by right-clicking the tile.

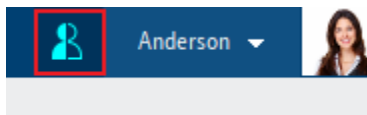
## Toolbar



You can change the display options of the entries via the gray toolbar. The following options are available depending on the work area you are in:

- Table
- List
- Tiles
- Tree

## Active substitutions



You can substitute for other users, or be substituted for by other users or by groups. You will recognize both of these cases based on the person icon.

- Orange person: A substitute is currently set for you.
- Blue person: You are currently substituting for at least one person.

Clicking the icon opens more information on your substitutions.

You will find more information here:

- Assign substitute
- Accept substitution

## Navigation and use

This chapter provides information about the general use of the ELO Java Client. You can find information on specific actions in the chapters about the actions or the tabs.

### Navigating between work areas

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

- **My ELO:** Select the *My ELO* button to switch to the desired work area using tiles. This option is always available.
- **Navigation bar:** Select the desired work area right in the navigation bar. This option is only available if the work area tile is pinned to the navigation bar or you have pinned it as described in the *Create tiles* chapter.
- **Define keyboard shortcuts:** You can define keyboard shortcuts that allow you to open a work area or switch to another work area under *Ribbon > User menu [your name] > Configuration > Quick access to functions* (ELO Java Client)/*Keyboard shortcuts* (ELO Web Client). When switching to the next work area, the program starts with *My ELO* and then follows the order of the work areas as defined in the tile navigation.

### Using functions

**Contextual functions:** 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 a folder or document by selecting it. Once you have selected the entry, selected the function. In most cases, this opens a dialog box or another control element with instructions on how to proceed.

**Non-contextual functions:** Some functions are not contextual and can be used at any time. These functions are not related to selected entries. *Assign substitute* or *Refresh* are examples of functions that are not contextual.

### Open ELO in-program help

You can find the ELO help under *User menu [your name]*. If you need information about a specific dialog box, select the question mark icon in the dialog box.

Alternatively, you can access help in the ELO Java Client using the F1 button.

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

In the ELO Java Client: You can add functions to or remove functions from the context menu in the configuration (available in: *User menu [your name] > Configuration > Quick access to functions*). For more information, refer to the Customize the ribbon chapter. The method for the context menu is the same as for the *Favorites* tab.

## Important components

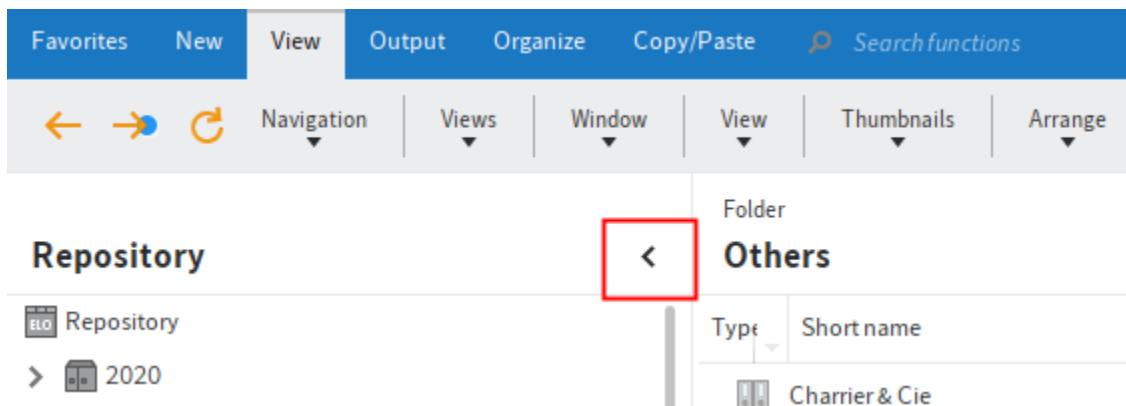
### Repository structure

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. If you click a folder, you will see the contents of the folder in the viewer pane. 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.

Minimize/maximize navigation

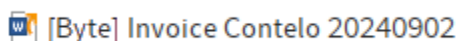


This function minimizes or maximizes the tree structure, or the tree structure and table view depending on the layout you have selected.

### Icons in entries



Entries with an arrow icon are references. Select *View > Go to* on the ribbon to go to the original entry.



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

You can learn how to check out and edit documents in the chapter Edit entry.



## Folders

If you have selected a folder, you will see the child folders and documents within it. You have the following options:

- You can change how the folder is displayed and the sort order, or browse the folder by short name.
- Press the CTRL or SHIFT key and click the entries to select multiple entries. This is not possible in the repository structure.

## Document

If you have selected a document, the document will be displayed on the *Content* tab, if this is possible.

If the document cannot be displayed, you have the following options:

- Save document: *Ribbon > Output > Save as*
- Open document in read-only mode: *Ribbon > Document > Open in read-only mode*
- Switch to different viewing options as described below.

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

- Original document: Automatic if no other option is selected
- Image preview: Image preview for formats, e. g. JPG, TIFF, PNG
- Full text: If available via the *Full text* tab

### Text view ('Full text' tab)

The ELO Java Client offers additional control elements in the viewer pane for displaying text files (formats: TXT, HTML, JS, etc.) or the full text contents of documents. The text view is used to display the full text information of documents that have been added to the full text database. You can also configure this view for documents with specific file extensions.

The text view/full text view has a menu bar with the following functions, which are displayed depending on the file format:

- Smaller or larger font



- Fixed font width: Switches the display to a non-proportional font so that all characters are displayed with the same spacing. This improves readability, e.g. of code.



- Automatic word wrap



- Search document: The matches are highlighted. Select the X icon to reset the search.



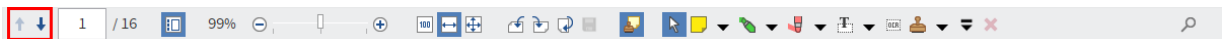
- Show previous or next hit



### Image preview ('Content' tab)

The ELO Java Client offers additional control elements in the viewer pane for displaying images (formats: JPG, TIFF, PNG, etc.) and PDF documents. You can also set this as the display mode for documents with specific file extensions.

- Next or previous page: The next or previous page of a multi-page document is displayed.



#### Information

You can change the order of pages in a TIFF document with multiple pages. You will find more information here: [Move pages.](#)

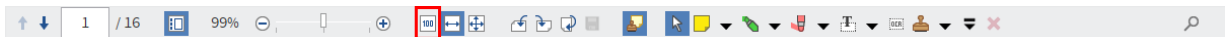
- Show thumbnails of pages: If you select this option, the pages of documents with multiple pages are displayed as thumbnails. Click on a thumbnail to go to the page.



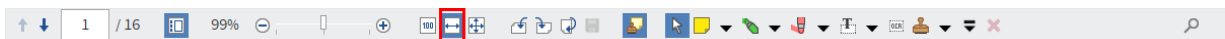
- Zoom in or out



- Zoom to 100%: The image is displayed in the original size.



- Fit image width to the frame: The image size fits the width of the viewer pane.

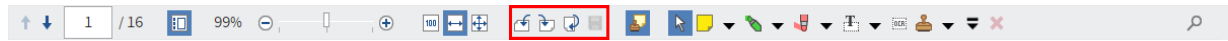


- Fit image size to the frame: The image is adjusted to the height of the viewer pane so that the entire page of the document is displayed.

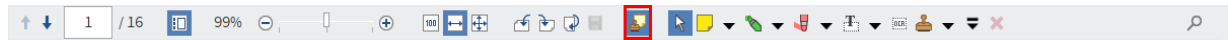


-

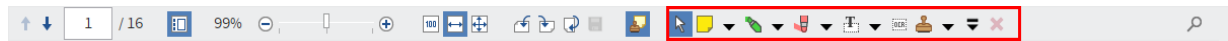
**Rotate document:** Rotates the document 90 degrees or 180 degrees. You can save the rotated document as a new version.



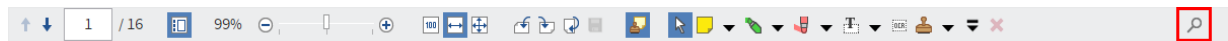
- **Show annotations:** You can see the annotations that have been applied to the document. Annotations can be sticky notes, text notes, stamps, or markers.



- **Add annotations:** You can attach sticky or text notes to the document, mark text passages, or apply stamps. You will find more information in the Add annotations chapter.



- **Search document:** ELO begins to search as soon as you start typing and highlights any matches in green.



If the document contains multiple matches, use the arrow icons next to the search field to skip through the matches. In this case, the currently selected match is highlighted in red.

Select the X icon to the right of the search field to reset the search.

### Move pages

You can change the order of pages in a TIFF document with multiple pages.

#### Method

1. In the viewer pane, go to the page that you want to move.



2. Select the *Edit pages* button (pencil icon, 1).
3. Select the *Open editing menu* button (icon with three dots, 2).

The *Move page* dialog box opens.

4. In the drop-down menu, select where in the document you want to move the selected page to.
5. Select *OK*.

Result

The selected page is moved.

## Viewer pane

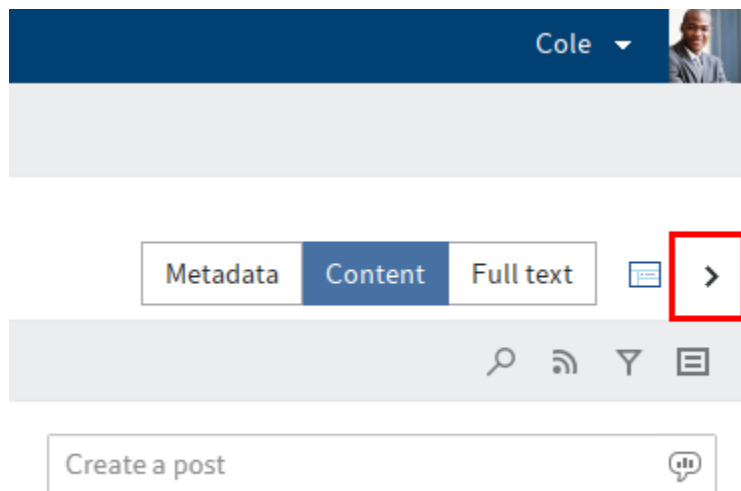
In the viewer pane, you will see the most recently selected entry (folder or document).

Each entry is made up of different elements:

- Content: If you have selected a folder, you will see the entries in the folder. If you have selected a document, the document will be displayed, if this is possible.
- Metadata/Form
- Feed

Maximize/minimize viewer pane

This function minimizes or maximizes the viewer pane.



With the default settings, content and metadata are shown on the left, while the feed is located on the right. You can change the layout arrangement by creating new view profiles.

## View profiles

### Information

These settings are only available in the ELO Java Client.

To define the settings for the viewer pane, you need to define a view profile. The button for opening the *Select and configure view profiles* menu is located directly below the ribbon on the right-hand side of the screen.

You can read about how to create a view profile in the [ELO Java Client user documentation \(English\)](#).

## 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 fields.

For more information, refer to the Edit metadata chapter.

## Feed

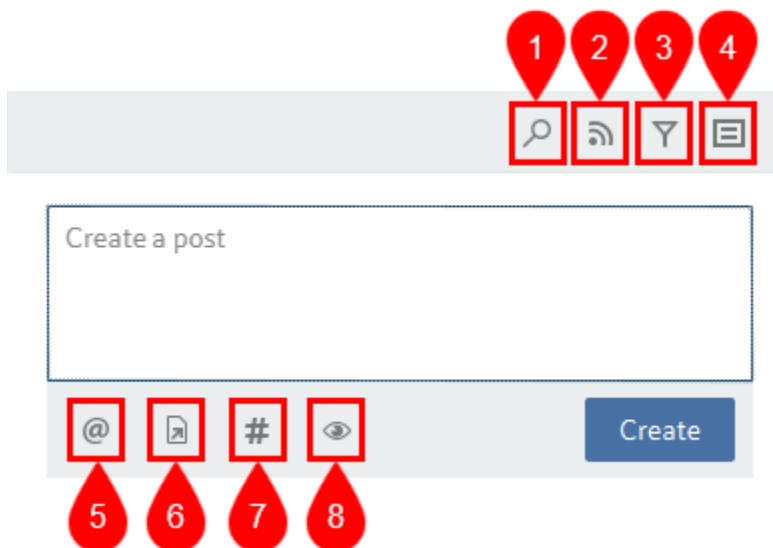
The feed is used to share information on an entry in ELO (document or folder) and record changes to the entry. New feed posts are denoted with a green dot.

When you subscribe to a feed for an entry, any new posts in the feed are also shown in *My ELO*.

If you tag users with @, the post will also appear in the feed in *My ELO*, even if they have not subscribed to the feed.

The following message types are shown in the feed:

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



1 Feed search

2 Subscribe to feed

3 Show filter options

4 Show metadata for the entry

5 Mention users or groups: Alternatively, enter @ in the feed post to insert a mention.

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

7 Hashtag: Alternatively, enter # in the feed post to insert a hashtag. Click a hashtag to subscribe to it.

8 Visibility: You can use this to restrict who can read your post.

### 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.

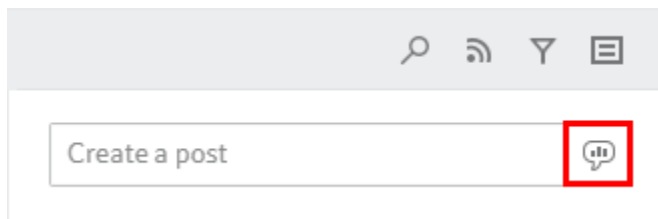
### Format text as bold

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

### 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.

### 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

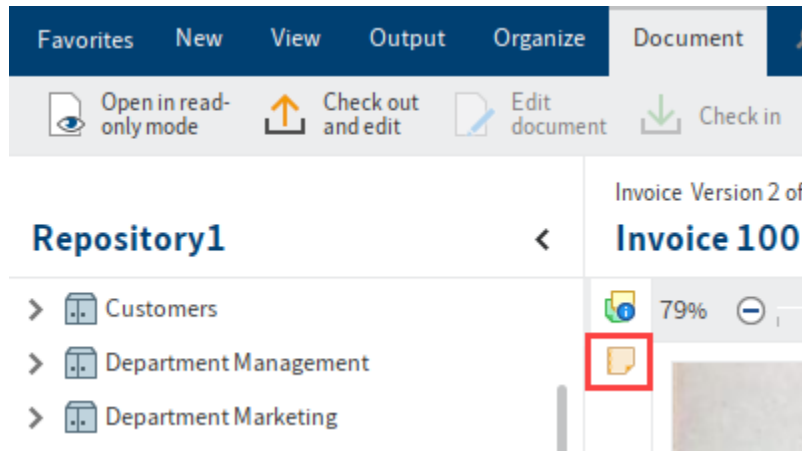
Select *Create* to start the poll.

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.

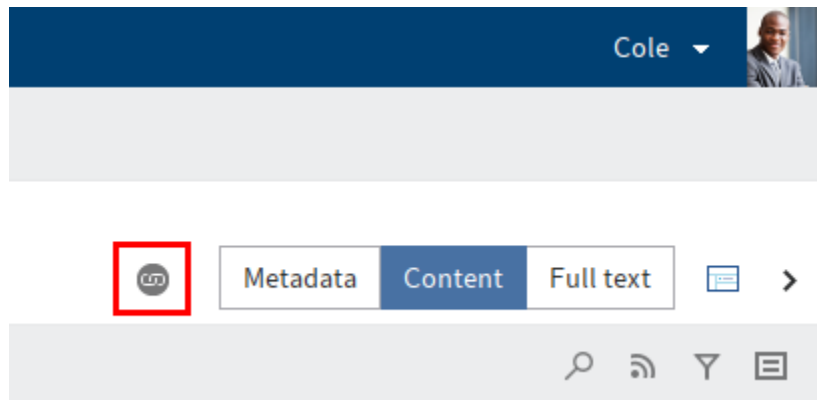
## Margin notes, links, attachments

If available for the selected document, you will see the following additional elements:



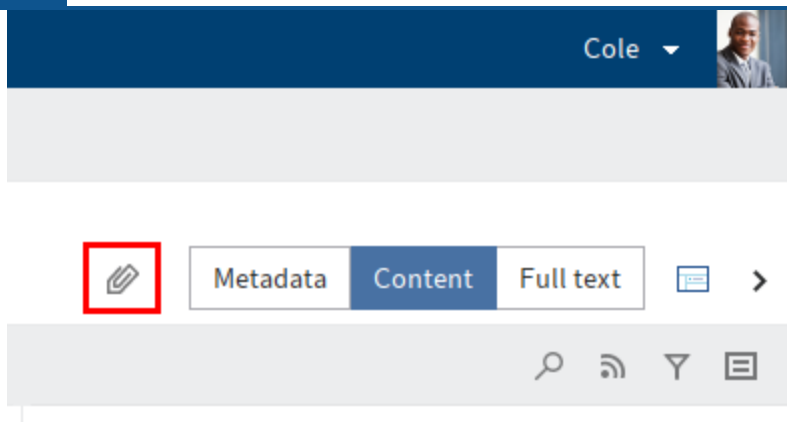
Margin notes: You will see margin notes for an entry on the split bar. Select the icon to open the margin note.

You can learn how to create a margin note in the chapter Add margin note.



Links: With the chain icon you can open an overview of links. You can also create additional entries as links.

To learn how to create a link, refer to the Link chapter.



Attachment: With the paper clip icon, you can open an attachment that was filed along with the selected document.

You can learn how to create an attachment in the chapter [Add attachment](#).



## Substitution rules

### Assign substitute

Substitutions ensure that your tasks are completed even if you do not have access to ELO for a longer period of time.

You can create substitutes and activate them immediately or later on.

This way, you can prevent workflow tasks from escalating when you are absent.

#### Please note

A substitution rule can only be changed or deleted by the following users:

- The user who created the substitution
- Main administrator
- Sub-administrator (of the user being substituted for)
- Supervisors (of the user being substituted for)

#### Method

1. On the ribbon, select *User menu [your name] > Assign substitute*.
2. Select your substitute using the input field or from the drop-down menu (users or groups).

As long as you haven't configured any settings for a substitute, their status will be *Incomplete*. With this status, the substitute cannot be used. You can configure settings either right away or later on.

You can configure different settings for different substitutes. For example, you can plan your substitutions in advance and edit their settings after the fact.

1. To configure more exact settings, tap one of the users or groups with substitution rights.

#### Settings

The following options are available for assigning a substitute:

- You can set a period during which another user automatically acts as your substitute.
- This gives the other user the right to substitute for you. In this case, they have to activate the substitution themselves.

**Period:** The *Active substitution in this period* option enables the input fields for the period. If you deactivate this option, the input fields are disabled. Entered periods are retained and can be reactivated later on.

You can define the following periods:

-

A definite period with a start and end

- An unlimited period
- Multiple definite and/or unlimited periods

### Information

You can add a time to the date in the ELO Web Client. Enter the time after the date in the following format: 2023-12-29 15:30.

If you have defined a substitution with an unlimited period, you can end the substitution by deleting the period with the X icon.

May forward substitution

Substitutions are not forwarded automatically.

Enabling the option *May forward substitution* allows your substitute to pass on the substitution to another user.

Even in this case, the substitution is not forwarded automatically – the user has to forward it actively.

### Please note

Use this option with caution to prevent rights from being forwarded unintentionally within the company.

Substitution scope

You can individually configure how many rights you want to give your substitutes.

Substitute inherits everything: Your substitute can see everything that you see.

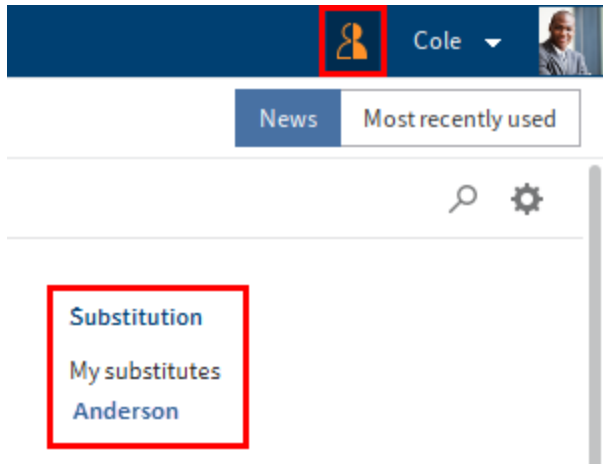
Restrict substitution: You decide what your substitute is allowed to see.

You must enable at least one of the following three options:

- Personal tasks and workflows: If you enable this option, your substitute can access tasks and workflows that you have been assigned personally (not group workflows).
- Intraday access: Your substitute has access to your Intraday. The Intraday is only available in the ELO Java Client.
- Inherit group membership: Select which of your groups the substitution applies to. The substitute is assigned the user rights, permissions to entries, annotations, feed entries, and group tasks associated with the group. This allows you to create multiple substitutes for the same period and allocate permissions for different groups. You can only select the groups from which a substitution is allowed.

Result

You have set up a substitution. If the substitution period has already begun, the substitution is already active. Otherwise, the substitution will become active when the defined start date is reached or the authorized user activates the substitution.



If you are currently being substituted for, you will recognize this by the orange figure next to your *User menu [your name]*.

You will also see on your *My ELO* start screen that you are being substituted for.

Outlook

A substitution ends

- at the end of the defined period, or
- if the user substituting for you ends the substitution.

## Accept substitution

On the ribbon, select *User menu [your name] > Accept substitution*. In the dialog box, you can see who you are currently substituting for or may substitute for.

The following options are available for accepting substitution:

- Another user has defined a period during which you automatically accept their substitution.
- Another person has given you the right to substitute for them. In this case, you have to activate the substitution yourself.

In the *I have the right to substitute for* area, you will see an overview of the users you have permission to substitute for.

### Information

If you are a supervisor of other users, you automatically have the right to substitute for these users. Users for whom you are a supervisor are not automatically displayed in the overview. Select a user from the *Add employee* drop-down field. This field is only displayed if you have been assigned the role of supervisor.

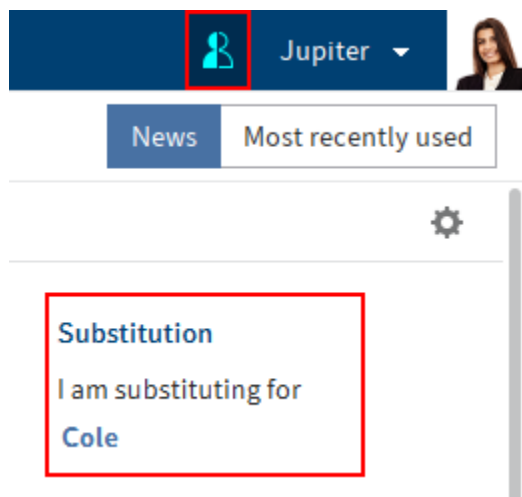
Active substitutes are marked green.

If you select a user, you can view their substitute permissions. This area is for information purposes only and cannot be edited.

### Edit substitutions

You have the following options:

- Enable/Disable: These buttons are only available if the user you want to substitute for has given you the right to activate and deactivate the substitution yourself.
- Forward: You can use this to forward a substitution if the user you are substituting for has given you the corresponding right. You can either hand off the substitution entirely or assign an additional substitute.



If you are currently substituting for another user, you will recognize this by the blue person next to your *User menu [your name]*.

You will also see on your *My ELO* home screen that you are substituting for another user.

### Show substitution tasks

You can view substitution tasks in your *Tasks* work area. Substitution tasks are tasks of another user for which you are set as the substitute.

Method

1. Switch to the *Tasks* work area.
2. Select *Ribbon > Task > Display* (ELO Java Client) or *X active* (ELO Web Client).

Result

The substitution tasks are shown in your task list.

### Information

In the ELO Java Client, you can't mark substitution tasks as read by default. However, you can enable this option under *Configuration > Display > Task list display options > Mark group task as read*.

## View substituted user's Intray

Available in: *Intray work area > Ribbon > File > Transfer*

The *View substituted user's Intray* function lets you manage items in another user's Intray. You must be active as the substitute for the respective users.

### Please note

If you want to view, copy, or retrieve documents from another user's Intray, these documents must already have been saved on the server. You can enable this setting under *User menu [your name] > Configuration > Advanced settings > Settings for the Intray work area > Save Intray on server when logging off*. If necessary, contact your system administrator.

The following functions are available in the *View substituted user's Intray* dialog box:

- Open in read-only mode
- Copy: Creates a copy of the selected document in your own Intray. The original document remains in the Intray of the user you are substituting for.
- Move: Moves the selected document to your own Intray. The document is removed from the Intray of the user you are substituting for.

### Information

You can make multiple selections when copying or moving documents by holding down the CTRL key.