



ELO Essentials

Personalization



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Create tile

You can create tiles that provide you with quick access to a specific area of the repository. These types of tiles are called views.

A new view is displayed as a tile in the tile navigation on your *My ELO* home screen.

You can create two types of views:

- Folder view: A folder view takes you straight to a frequently used folder.
- Task view: A task view shows you tasks with criteria you selected (e. g. tasks with expired deadlines).

Information

Like views, search favorites are displayed as tiles on your *My ELO* home screen. You can create search favorites in the *Search* work area via the *Search > Save search* tab.

Create folder view

You can create views for folders in the *Repository* work area that you use frequently.

Method

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

In the *New view* dialog box, the name of the folder is automatically displayed in the *Name* field. You can change this name if you want to use a different one.

In the *Folder* area, the folder that you previously marked is selected. You can select a different folder if you want to.

3. Select *OK*.

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.

You can also pin a tile to the navigation bar using the context menu (right-click).

If you have created multiple views, you have the option to group them. Open the context menu for this by right-clicking the group name.

You can rename or delete a folder view. To do so, select *View > Views > Manage views* on the ribbon and select the corresponding view in the dialog box.

You can find more information in the Edit tile section.

Create task view

You can create task views with your own custom criteria, for example with a high priority.

A task view creates a tile that gives you direct access to the tasks meeting the selected criteria.

Please note

Tasks displayed in a task view based on the criteria you set no longer appear in the *Tasks* work area. You can access these tasks from the corresponding task view tile in the *My ELO* work area.

Method

1. Navigate to the *Tasks* work area.
2. Select *Ribbon > View > New view*.

The *New task view* dialog box opens.

3. Define the criteria for showing tasks in the task view.

Some fields are only enabled based on other fields. For example, *Fields* is enabled once you have made a selection under *Metadata form*.

You can set the following criteria:

- **Type:** You can select the type of tasks that should be filtered for here. If no task type is selected, all tasks are displayed.
- **Priority:** Specify the priority according to which you want to filter the tasks. Only tasks with the selected priority are displayed. If no priority is selected, all tasks are displayed.
- **Status/Name/Workflow step:** Use the drop-down menu and the input field to define which criteria the status, name, or workflow step of the tasks must meet for the corresponding tasks to be displayed.

Use the drop-down menu to select which condition applies.

In the input field, enter the character string that the selected condition should be applied to. To enter multiple strings, separate the entries with the pilcrow character ¶.

- **Editor:** Select an editor of the tasks. The task view only contains tasks assigned to the selected editor.
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Owner: Select an owner of the tasks. The task view only contains tasks assigned to the selected owner. The owner is the user who started the workflow.

- **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, you can use the plus sign to add fields so that you can filter by their contents.

Select the field from the first drop-down menu. In the second drop-down menu, select which condition applies.

In the input field, enter the character string that the selected condition should be applied to.

If you add multiple fields, you can connect the lines with *and* or *or*.

- **Show postponed workflows:** If this workflows option is enabled, postponed workflows will also be displayed within the new task view.

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.
- You can also pin a tile to the navigation bar using the context menu (right-click).
- You can rename or delete a task view. To do so, select *View > Views > Manage views* on the ribbon and select the corresponding view in the dialog box.

You will find more information here:

- Edit tile
- Tasks

Edit tile

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

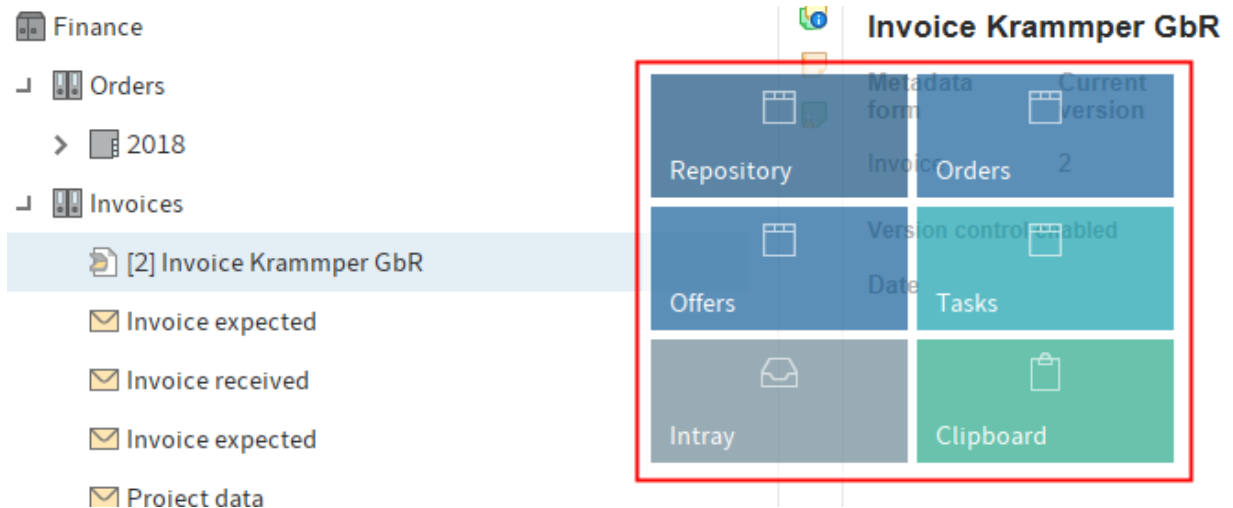
Information

Hidden tiles are moved to the *Hidden tiles* group. To restore the tile, drag it to the desired location in the tile navigation.

Use *context menu (right-click) > Settings* to open the *Tile settings* area. You can change the color, the icon, and the size of the tile.

You can also enable the following options:

- Pin to 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.
- Show tile overlay in drag-and-drop (ELO Java Client only): If this option is enabled, the tile appears as an overlay when you drag and drop an entry to the repository. Drop the entry onto the overlay to move it to the respective area.



- Show number of entries
- Diagram view (ELO Java Client only)
- Keyboard shortcut to access a tile: You can assign a keyboard shortcut for quick access to a tile. Click the field and enter the desired keyboard shortcut.

Please note

Do not use a keyboard shortcut that is already being used by ELO or other programs.

Information

Different settings are available depending on the type of tile you want to edit.

The changes are saved automatically.

Customize the ribbon

There are different ways that you can personalize the ribbon:

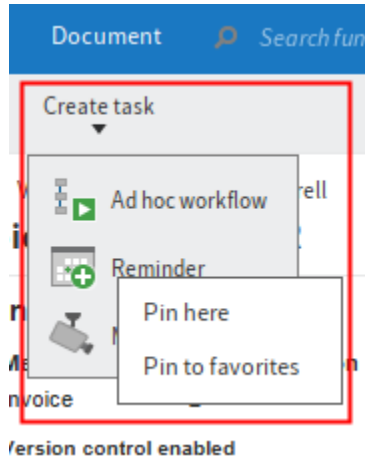
- Pin/unpin functions
- Show/hide text
- Add/remove favorites

You can learn how to adjust the context menu in the Add favorites section.

Pin/unpin functions

While many functions are directly visible on the ribbon, others are in drop-down menus. You can unpin functions from a drop-down menu and pin them to the ribbon.

Method



1. Right-click the desired function.
2. In the context menu, click *Pin here*.

Result

The function now appears on the ribbon.

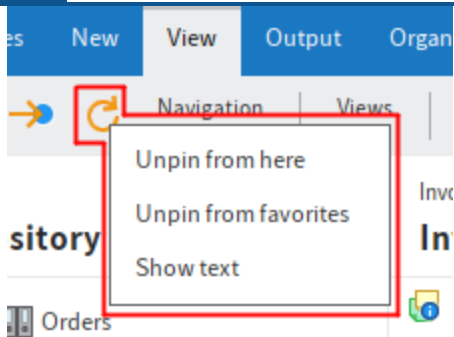
Outlook

To unpin a function from the ribbon, click *Unpin from here* in the context menu. The function is moved to the drop-down menu of the group.

Show/hide text

Some functions are only displayed as icons on the ribbon. The name of the function is not shown. You can show the name.

Method



1. Right-click the desired function.
2. In the context menu, click *Show text*.

Result

The name of the function now appears on the ribbon.

Outlook

To hide the name of a function, click *Hide text* in the context menu. The name of the function is no longer shown.

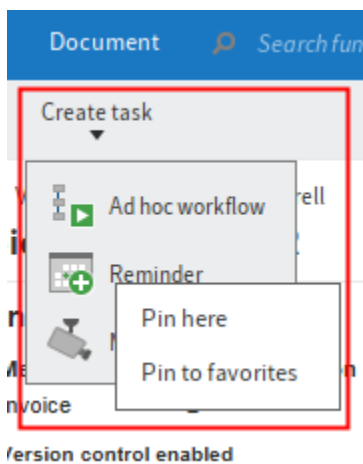
Add/remove favorites

You have the following options for adding functions to the *Favorites* tab:

- In the context menu on the ribbon
- In the configuration

In the context menu on the ribbon

Method



1. Right-click the desired function.
2. Select *Pin to favorites* in the context menu.

Result

The function now appears on the *Favorites* tab.

Outlook

To remove a function from the *Favorites* tab, select *Unpin from favorites* in the context menu. You will now find the function in the corresponding group tab.

In the configuration

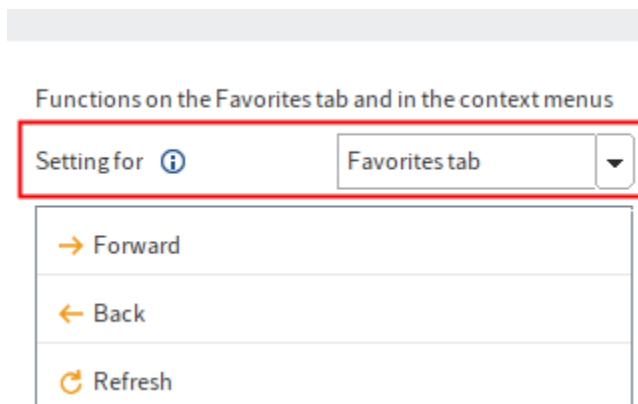
In the *Quick access to functions* area in the configuration, you can add functions to or remove functions from the *Favorites* tab, and change their location.

Information

In this area, you can also add functions to the context menus of the work areas. Select the corresponding context menu from the *Setting for* drop-down menu on the right-hand side.

Method

1. On the ribbon, select *User menu [your name] > Configuration > Quick access to functions*.



An overview of all available functions in ELO appears under *Existing functions and keyboard shortcuts*. The functions currently visible on the *Favorites* tab appear under *Functions on the Favorites tab and in the context menus*.

2. Select the desired function in the *Available functions and keyboard shortcuts* column.
3. Select *Add function* (arrow icon pointing to the right).

Optional: For better visual clarity, you can insert any number of separator lines between the functions in the menus. Select the *Separator line* function.

4. To remove a function from the *Favorites* tab, select the function under *Functions on the Favorites tab and in the context menus* and select *Remove function* (left arrow).

Alternatively: You can also add or remove functions by drag-and-drop or by double-clicking.

- 5.

Move the order of the functions up or down on the *Favorites* tab using the arrow icons.

6. Select *OK*.

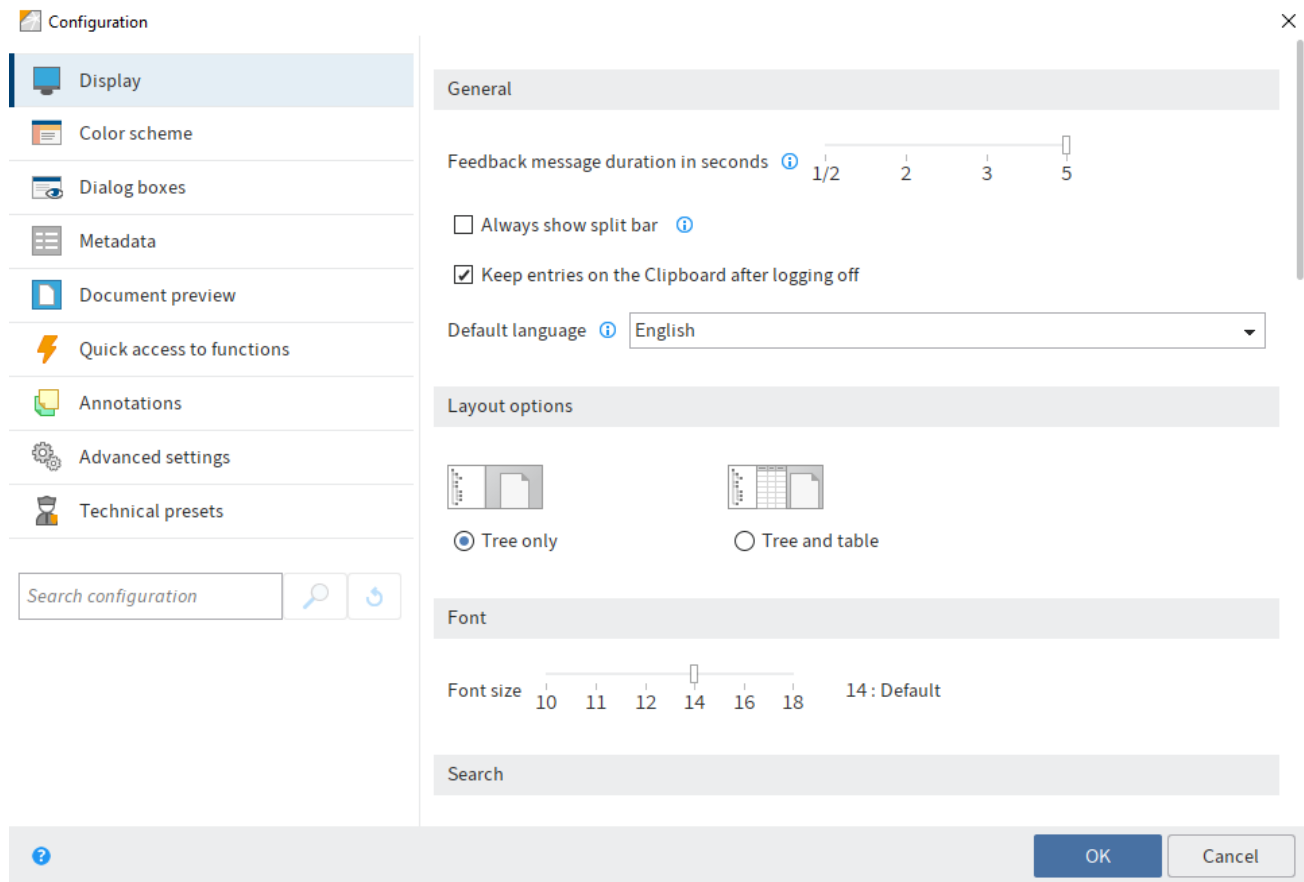
Result

You have set the functions on the *Favorites* tab.

Adjust settings

You can make system settings for ELO via the *Configuration* dialog box (access via *User menu [your name] > Configuration*).

The dialog box consists of several areas.



If you want to search for a specific setting, use the search field.

Behind some settings you will find an *i*. The *i* opens additional information about the setting.

ELO Java Client

In the ELO Java Client, the dialog box consists of the following areas:

- Display: Settings for displaying entries, search results, and tasks. Define the font size here for better readability.
- Color scheme: Set color scheme and display mode for ELO
- Dialog boxes: Settings for dialog boxes and notifications
- Metadata: Define settings for metadata, for example, metadata forms for certain file types.
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Document preview: Settings for the document preview, for example, preview configuration for certain file types.

- Quick access to functions: You can define functions in the *Favorites* tab here, as well as in the context menus for entries in the *Repository*, *Tasks*, and *Intray* work areas. You can also define keyboard shortcuts for functions.

Please note

Some keyboard shortcuts are already in use by the operating system or other programs, in particular the function keys F1 to F12. You can assign keyboard shortcuts to the function keys but the commands will not be executed. Keyboard shortcuts at the operating system level are executed first.

- Annotations: Set the display of annotations
- Advanced settings: Various settings including for the *Intray* work area and workflows.
- Technical presets: Date format, technical presets, and additional settings
- Manage functions: You can set the ribbon for other users here. This area is only available for users with administrator rights.

Information

If you set the value 0 for spin boxes you disable the respective option.

You will find more information on the configuration of the ELO Java Client here:

- [ELO Java Client user documentation \(English\)](#)
- [ELO Java Client administration \(English\)](#)

ELO Web Client

In the ELO Web Client, the configuration consists of the following areas:

- Display: Settings for displaying entries, search results, and tasks
- Dialog boxes: Settings for dialog boxes and notifications
- Color scheme: Set color scheme and display mode for ELO
- Metadata: Settings for metadata, for example, metadata forms for certain file types.
- Favorites: Define functions on the *Favorites* tab
- Keyboard shortcuts: Define keyboard shortcuts for functions
- Administration: Date formats, technical presets, and additional settings
- Configuration sets: Determine configuration sets for the selected user or the selected group. This area is only available for users with administrator rights.

The following option is also available:

Reset my view data: Restore the default values for your account. The view data includes table settings, window sizes, and positions.

You will find more information on the configuration of the ELO Web Client here:

- [ELO Web Client user documentation \(English\)](#)
- [ELO Web Client administration \(English\)](#)