ELO Essentials

Tasks

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Complete tasks with workflows

Using workflows, you can assign tasks to other users or groups.

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

You can find more information on all the workflow functions in the ELO Java Client (English) and ELO Web Client (English) user documentation.

Start workflow

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

Related function

Ad hoc workflow: Starts short default workflows for approval or notification.

Method

1. Select the entry you want to start a workflow for.
2. On the *New* tab > select *Start workflow*.
3. Select a workflow template.

   Show template (ELO Java Client)/Preview (ELO Web Client): Shows the individual steps of the workflow. As the workflow is already configured, you do not have to configure any additional settings.

   > **Information**
   >
   > To allow changes to the template when starting the workflow, enable the option *Start workflow in edit mode* (*User menu [your name] > Configuration > Advanced settings > Workflow*) in the ELO Java Client.

   In addition to the workflow steps, you will see the respective editor and, if applicable, the time allowed for the workflow step until escalation (days:minutes:seconds).

4. Select *OK*.

Result

The workflow starts.

Outlook

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

- You can view workflows for an entry using the function *Workflows for this entry* (available in: *Ribbon* > *Organize*).

You can find information about creating a workflow template in the ELO workflow (English) documentation.

Forward workflow

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

The next step depends on whether or not the workflow contains a form.

If you have received a workflow and the *Forward workflow* button on the *Task* tab is disabled, this is for one of the following reasons:

- If receive a workflow with a form, forward it using the form.
- You received the workflow as a member of a group. You can find more information about the process in the Forward group workflows section.

The way you forward a workflow differs depending on whether the workflow contains a form or not.

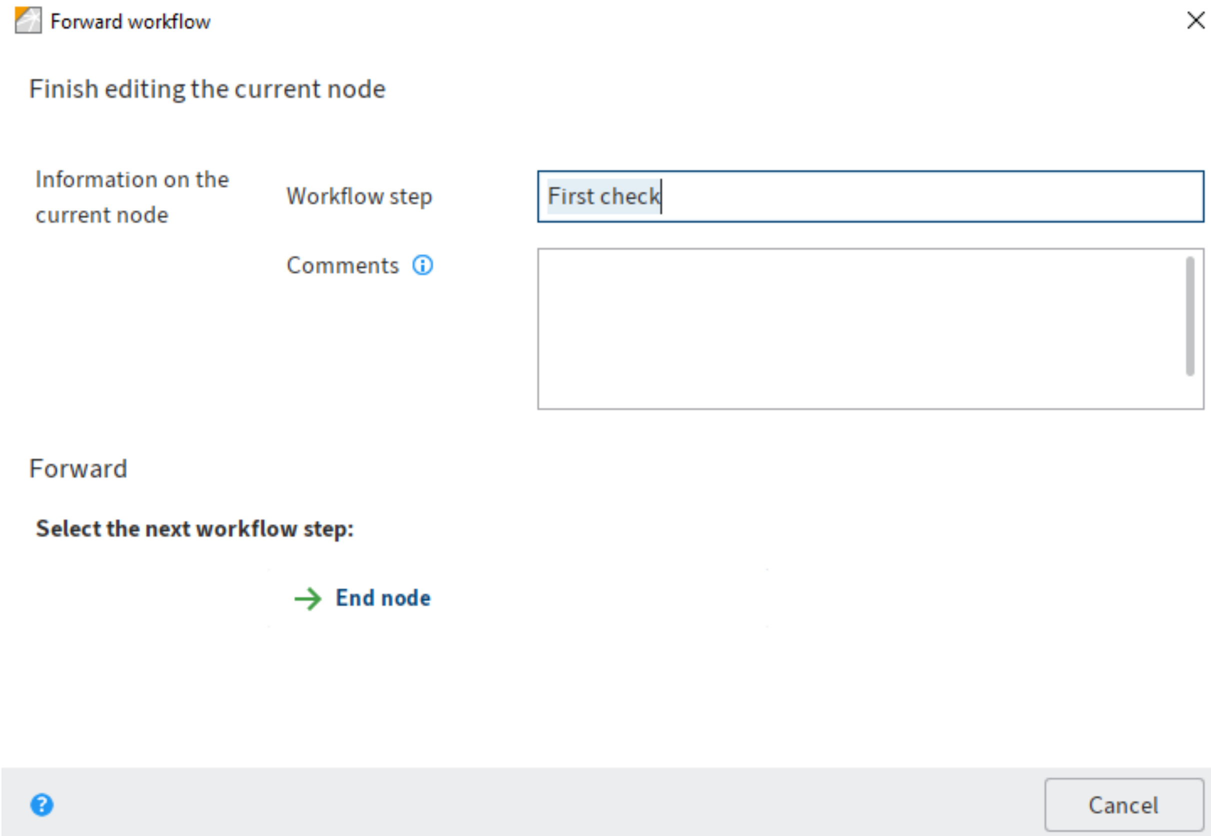
Related functions

- Delegate workflow: You can delegate a workflow node to another user. The user is displayed in an additional node in the workflow. You can specify whether you want to be notified after completing the workflow task.
- Hand off workflow: You can hand off your entire processing step to another user. You will then no longer notified of the progress of the workflow.
- Postpone workflow: You can suspend processing of a workflow. The workflow will be hidden in the *Tasks* work area until the specified date. Undo the postponement with the *Cancel postponement* function.
- Extend workflow deadline: Extend a workflow with an expired deadline.

Method

1. Select the workflow that you want to forward.

2. On the ribbon in the *Task* tab, select > *Forward workflow*.



You can define a name for the workflow node in the dialog box and enter a note for the next user.

Please note

You can only view the comment in the ELO Java Client if you navigate to *Organize > Overviews > Workflow overview* and enable the *List view*.

3. Select the next workflow step.

   The workflow is forwarded and the dialog box is closed.

   Information

   Select the desired option in the ELO Web Client followed by *OK*.

   Depending on which settings apply for the current node, you can select one or more successor nodes in the *Forward* area.

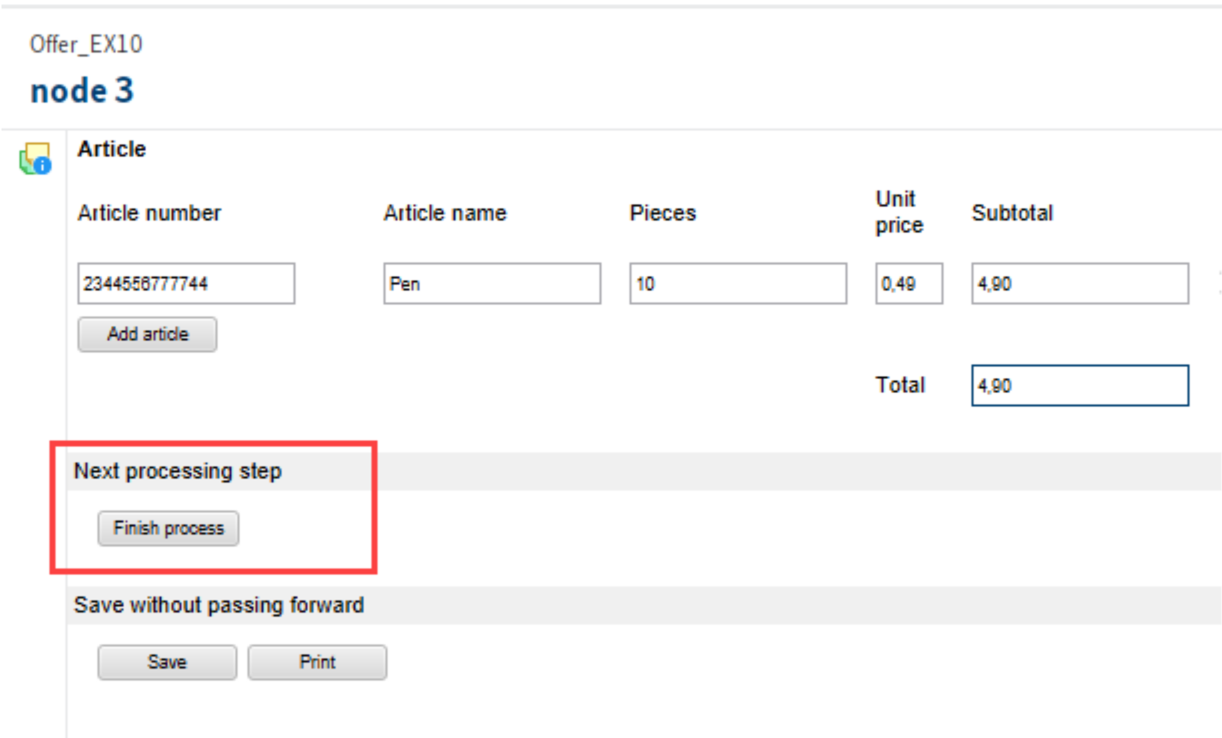
Result

The workflow is forwarded and disappears from your tasks.

Workflow with form

For workflows with forms, you will find the form on the *Form* tab (ELO Java Client) or *Metadata* (ELO Web Client). You can edit and forward it here.

If you receive a workflow you have to forward via a form, the *Forward workflow* button is disabled.



Method

1. Edit the fields of the form as indicated in the task.
2. Select the corresponding button within the form.

Result

The workflow is forwarded and disappears from your tasks.

Forward group workflows

You can receive, forward, or hand off a workflow as a member of a group.

> **Please note**
>
> Once you have accepted a group workflow, it will disappear from the task list of the other group members. This prevents the workflow from being processed by multiple users at once.

Method

1.

Select *Ribbon > Task > Accept workflow*.

Alternatively: You can also accept a form workflow by double-clicking the entry in the task list.

Result

You have accepted the workflow.

Outlook

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

Start ad hoc workflow

Ad hoc workflows are simple, predefined workflows available in ELO. You can use an ad hoc workflow to route an item to users for approval or to notify them.

Method

1. Select the entry you want to start an ad hoc workflow for.
2. On the ribbon, select the *New tab > Create task > Ad hoc workflow*.
3. Configure the settings for the ad hoc workflow.
4. Select *Completion options* (ELO Java Client)/*Finish* (ELO Web Client) and configure additional settings for the ad hoc workflow here, for example:

   Success message: The text from this field is shown to the recipients above once the ad hoc workflow has been completed. It appears in the recipient's *Tasks* work area.

   Cancellation message (approval workflows only): The text from this field is shown to the recipient above if the ad hoc workflow has been canceled. It appears in the recipient's *Tasks* work area.

   Withdraw the workflow from all users as soon as one user does not approve it (parallel approval workflows only): If this option is enabled, all recipients must approve the workflow. Otherwise, the ad hoc workflow is canceled entirely and the task is removed from the tasks of the other selected users. In your tasks and on your home screen, the message *Not approved* will appear in *My ELO* under *My recently started workflows*.

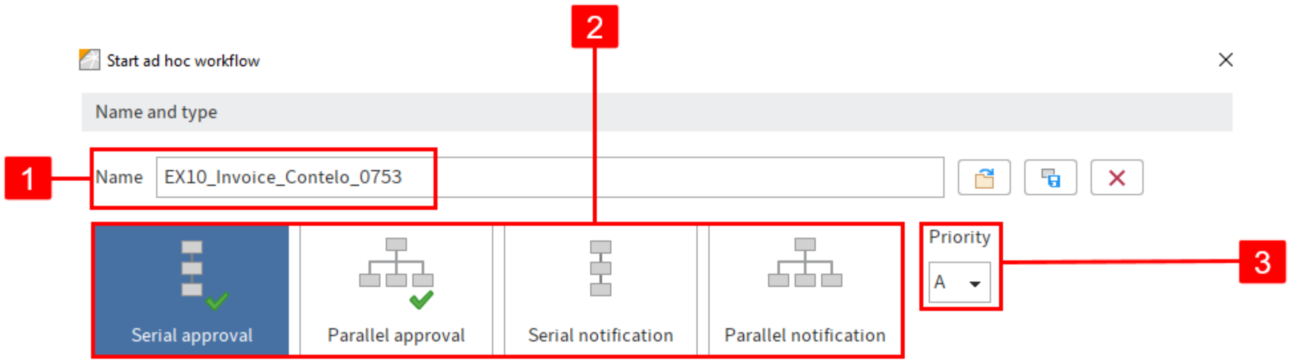
   End script: If required, select a script that is executed after the ad hoc workflow is completed.
5. Select OK.

Result

The workflow is started and displayed in the *Tasks* work area of the selected users.

Settings for the ad hoc workflow

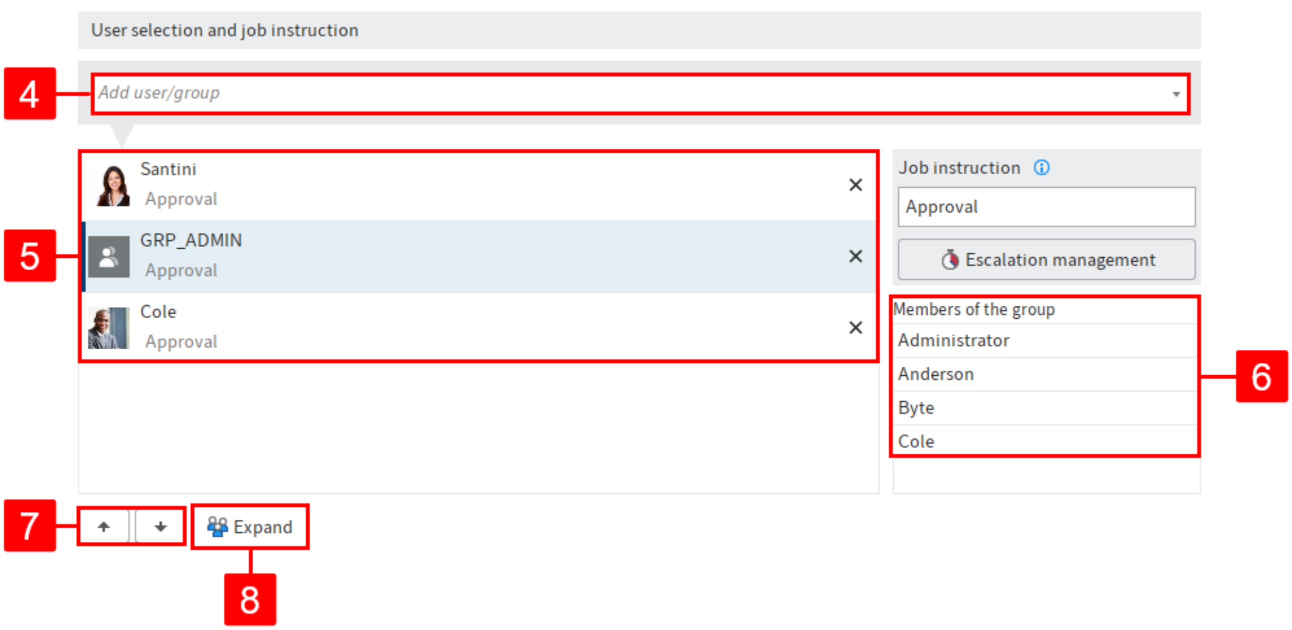
The following options are available:



1 Name: Workflow display name

2 Ad hoc workflow type: Serial workflows are forwarded to the responsible users sequentially. Parallel workflows are sent to all involved users at the same time.

3 Priority: You can sort and filter the task list according to priorities.



4 Add user/group

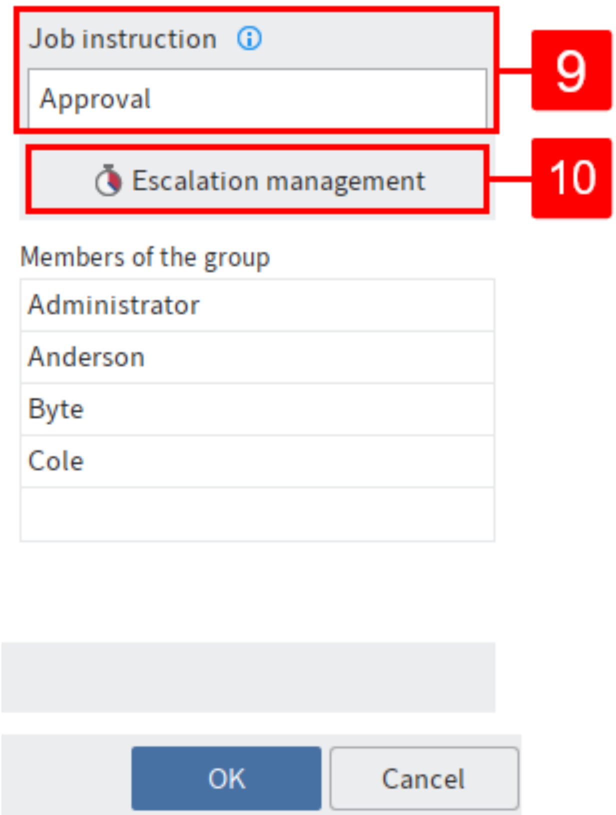
5 Users and groups that were added to the workflow

6 Members of the group (ELO Java Client): This list appears if you select a group. In the ELO Web Client, you can open the list by selecting the *Show members* button.

7 Change order: To change the order of recipients in serial ad hoc workflows, select a recipient and change their position using the arrows (or drag-and-drop).

8 Expand: Show the individual members of a selected group. To do so, select the corresponding group and then click *Expand*. You can remove members by selecting the X icon.

> **Information**
>
> If the group is selected, one member of the group can accept and process the workflow. If you expand the group, every member of the group can accept and process the workflow.



9 Enter job instruction: Enter the individual job instruction for the user selected in the list here. You can select multiple. The user sees the job instruction in the *Workflow step* column of the *Tasks* work area as soon as they have accepted the workflow.

> **Information**
>
> The job instruction can have a maximum of 128 characters.

10 Escalation management: Specify how long the workflow may remain with the respective user or group here. You can also select a user or group to be notified if the deadline is missed.

> **Information**

If the workflow has escalated, it appears in the Tasks work area of the responsible users and in *My ELO* under *Escalated workflows*. Selecting an escalated workflow in *My ELO* takes you to the escalated workflow in your Tasks work area.

The following functions are only available in the ELO Java Client:

1 Load ad hoc workflow from template (folder icon): Opens ad hoc workflows saved as a template.

2 Save as template (disk icon): Saves the current ad hoc workflow as a template. You can assign a name to the template.

Information

With the default settings, templates are only available to the user who creates them. However, a user with the corresponding permissions can forward these templates to other users as a reference/copy. The references/copies must be saved to the *AdHoc Templates* folder of the respective user.

3 Delete an existing template (X icon)

Please note

If you delete the original template, any references that you have created will also be deleted.

Organize reminders

You can create a reminder for a document or a folder. A reminder defines a date on which the document or the folder appears in the *Tasks* work area of the user responsible.

Method

1. Select *Ribbon* > *New* > *Create task* > *Reminder*.

   > **Information**
   >
   > You can use this function to edit existing reminders.

2. Enter a name for the reminder.
3. Enter the date on which the entry should be resubmitted as a task.
4. Select a priority level. You can sort and filter the task list according to priorities.
5. Enter the desired user or group.

   If you select a group, a list of members appears.

   Double-click the corresponding user in the *Members of the group* column to select a member of a group.

   Expand: Lists the individual group members.

   Optional: Enter a message or instructions for the recipient of the reminder in the *Note* field.

Result

You have created a reminder.

Outlook

- Use the *Reminders for entry* function (available in: *Ribbon* > *Organize* > *Overviews*) to open an overview of the reminders for a selected entry.
- You can open an overview of your reminders under *Ribbon* > *Organize* > *Overviews* > *Reminders overview*. You can view and edit the reminders here.
- You can change a reminder in the *Tasks* work area > *Ribbon* > *Task* > *Edit*.

Edit reminder

You can edit an existing reminder with the *Edit reminder* function (available in the *Tasks work area > Ribbon* > *Task* > *Edit*). You can view and edit the current settings.

Alternatively: You can also edit a reminder with the *Reminder* function.

Delete reminder

There are two ways to delete a reminder:

- Select the reminder in the *Tasks* work area and select the *Delete* function (available in the *Ribbon* > *Organize* tab).
- With the function *Delete reminder* (available in: *Ribbon* > *Organize* > *Overviews* > *Reminders overview*)