ELO for Microsoft 365

ELO Sync

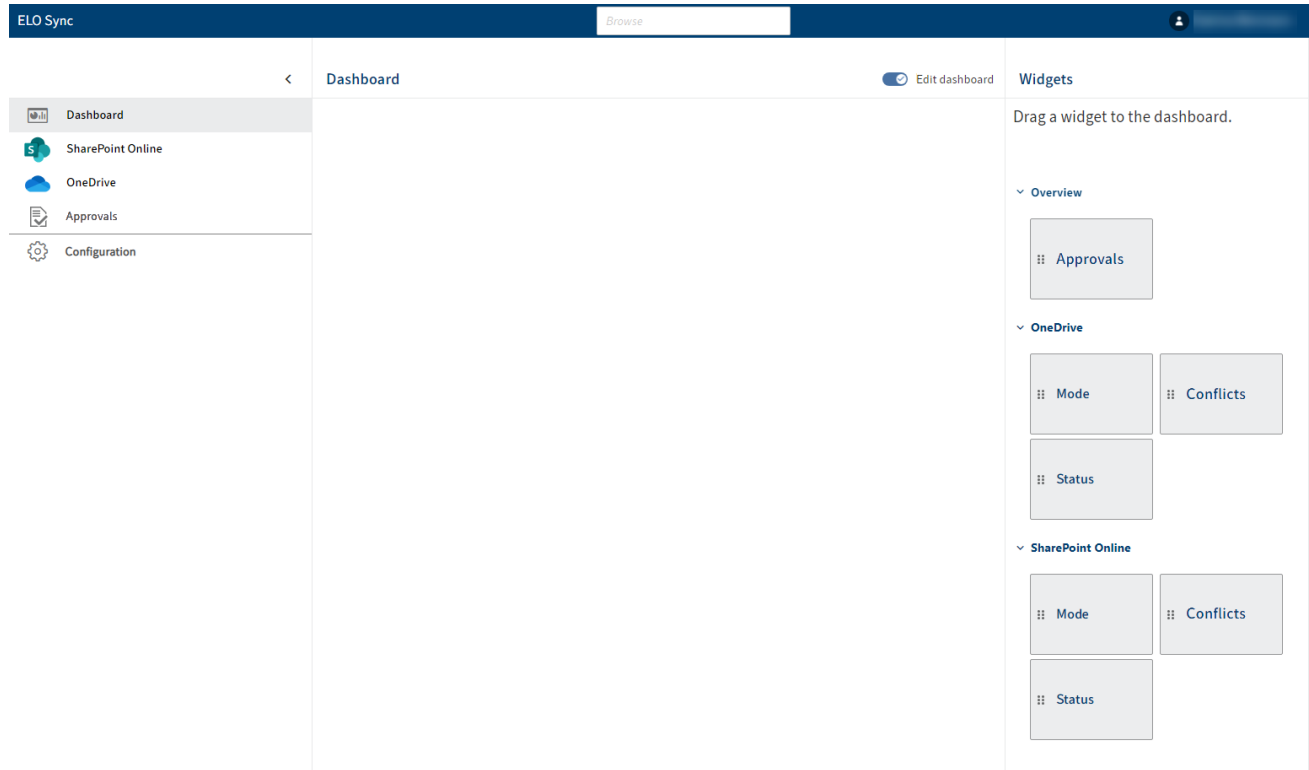# Table of contents

Dashboard

The dashboard is the start page of ELO Sync. You can add widgets to the dashboard and arrange them according to your needs.

If you enable the *Edit dashboard* slider, you have access to the following widgets under *OneDrive* and *SharePoint Online*. You can drag the widgets to the dashboard.

- Mode: Shows the active and inactive jobs.
- Conflicts: Shows all conflicts found for the respective area. You can resolve a conflict from the dashboard directly.
- Status: Shows the number of different job statuses.

'SharePoint Online' area

The *SharePoint Online* area is where you manage jobs associated with your documents in SharePoint Online. You can select the following job types:

- Publishing job
- Filing job
- Synchronization job

Configuration area

The configuration area opens when you select the *Add* button to start a new job.

'Settings' tab

The *Settings* tab contains the following areas:

- Overview
- Synchronization interval
- Metadata
- Approvals

The fields in the individual areas vary depending on the job type.

'Overview' area

This area is where you enter basic information about the job. All mandatory fields are marked with a red asterisk.

-

ELO settings: This is where you enter information about the target folder in ELO. This includes the target folder for entries from SharePoint Online and the metadata form you want to assign.

- SharePoint settings: This is where you specify the location (synchronization level) of the entries in SharePoint Online that you want to store in ELO.

'Synchronization interval' area

This is where you specify when to synchronize jobs between SharePoint Online and ELO.

Even if you select an automatic synchronization interval, you still have to start the job using the *Execute* button.

'Metadata' area

You can also store the associated SharePoint Online metadata along with the entries in ELO. You have the following options:

- Do not export
- Export as JSON
- Export as XLSX

If you export the metadata as JSON or XSLX, the respective file is stored with the metadata in ELO.

In the fields, specify which SharePoint Online metadata you want to store in ELO.

Enter the information according to the following convention:

- SharePoint Online: *site name\list name\column name*
- ELO: *metadata form name\aspect mapping\field name* (aspect fields), *metadata form name\field name* (index fields)

'Approvals' area

This is where you specify the parameters for the jobs.

You can make the following specifications:

- Define maximum document size
- Maximum number of documents per job

If the specifications for executing a job are not met, you need to approve or reject the corresponding job on the *Approvals* tab.

'Protocol' tab

This tab provides an overview of the changes you have made to a job after it has been executed at least once.

A corresponding list is generated separately for ELO and SharePoint Online:

- How many documents and/or folders were created or deleted?
-

> How many documents were changed?
- How many entries were moved or renamed?

'Approvals' tab

If you have specified the document size and number of documents per job under *Settings > Approvals*, the entries that do not meet your specifications are shown on the *Approvals* tab.

Check the box next to the entry you want to edit and select the *Approve* or *Reject* button.

On the *Approvals* tab, you only see the approvals associated with the job you are currently in.

The approvals for all jobs are listed under *Approvals* in the sidebar on the left.

'Conflicts' tab

Conflicts that occur during synchronization in the respective job are listed here. A conflict can occur, for example, if the versions in SharePoint Online and ELO you are trying to synchronize are different.

On the *Conflicts* tab, you can resolve these conflicts by specifying whether you want to keep the SharePoint Online version or the ELO version.

Execute job

Once you have completed all settings for the job, you still need to execute it to start synchronization.
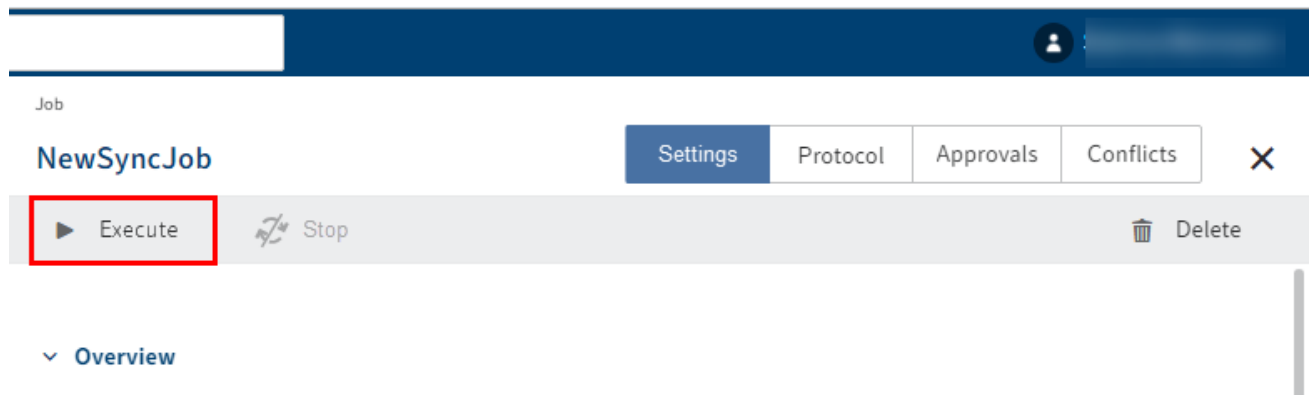
Start the job under *Settings > Execute*.

'OneDrive' area

The *OneDrive* area is where you manage jobs associated with your documents in OneDrive. You can select the following job types:

- Publishing job
- Filing job
- Synchronization job

Configuration area

The configuration area opens when you select the *Add* button to start a new job.

'Settings' tab

The *Settings* tab contains the following areas:

- Overview
- Synchronization interval
- Approvals

The fields in the individual areas vary depending on the job type.

'Overview' area

This area is where you enter basic information about the job. All mandatory fields are marked with a red asterisk.

-

ELO settings: This is where you enter information about the target folder in ELO. This includes the target folder for entries from OneDrive and the metadata form you want to assign.

- OneDrive settings: This is where you specify the location of the entries in OneDrive that you want to store in ELO.

'Synchronization interval' area

This is where you specify when to synchronize jobs between OneDrive and ELO.

Even if you select an automatic synchronization interval, you still have to start the job using the *Execute* button.

'Approvals' area

This is where you specify the parameters for the jobs.

You can make the following specifications:

- Define maximum document size
- Maximum number of documents per job

If the specifications for executing a job are not met, you need to approve or reject the corresponding job on the *Approvals* tab.

'Protocol' tab

This tab provides an overview of the changes you have made to a job after it has been executed at least once.

A corresponding list is generated separately for ELO and OneDrive:

- How many documents and/or folders were created or deleted?
- How many documents were changed?
- How many entries were moved or renamed?

'Approvals' tab

If you have specified the document size and number of documents per job under *Settings > Approvals*, the entries that do not meet your specifications are shown on the *Approvals* tab.

Check the box next to the entry you want to edit and select the *Approve* or *Reject* button.

On the *Approvals* tab, you only see the approvals associated with the job you are currently in.

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'Conflicts' tab

Conflicts that occur during synchronization in the respective job are listed here. A conflict can occur, for example, if the versions in OneDrive and ELO you are trying to synchronize are different.

On the *Conflicts* tab, you can resolve these conflicts by specifying whether you want to keep the OneDrive version or the ELO version.

Execute job

Once you have completed all settings for the job, you still need to execute it to start synchronization.
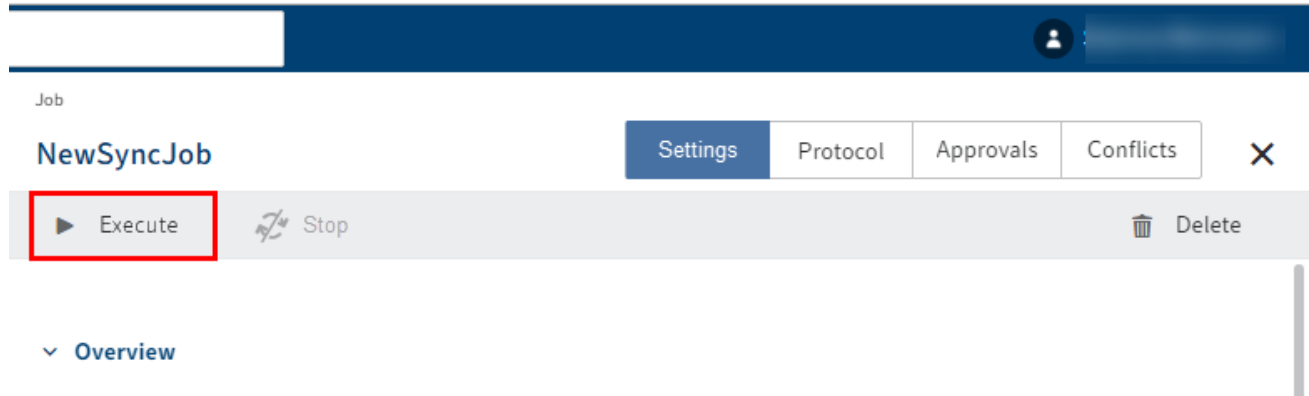
Start the job under *Settings > Execute*.

'Approvals' area

Approvals are required for starting jobs. Under *Settings > Approvals*, you define the general parameters for the respective job.

Approvals are displayed in the *Approvals* area if the entries being synchronized or stored do not meet the requirements.

You can make the following specifications:

- Define maximum document size
- Maximum number of documents per job

Configuration

The *Configuration* area is divided into multiple sections. In addition to the ribbon, the *Overview*, *Approvals*, and *Metadata* areas are available.

Administration functions

The *Select user* button on the ribbon and the *Overview* area are only available to administrators or users with administrative rights.

Select user

The *Select user* function enables the administrator to select a user or group. Their names are displayed on the ribbon under *Settings for [name of user/group]*. You can now edit the settings of the selected user or group.

'Overview' area

In the *Overview* area, the users or groups you are allowed to make settings for are listed under *Access allowed for*. Use the *Add* button to populate the list.

Configuration

Settings for **Administrators**   👤 Select user   ↻ Update