



ELO Java Client

Basics



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Basics

Basics

What is the ELO Java Client?

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 documentation is aimed at users without administrator rights. Administrators can use the [ELO Java Client administration](#) manual.

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.

Getting started

If you have no previous experience with the ELO Java Client or any other ELO client, the following chapters are a good place to start:

- 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

Basics

This 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 that you will find in all work areas.

Entries, tasks, personalization, and collaboration

This chapter provides descriptions of all actions and functions with instructions and explanations.

Which chapter(s) should I read if I...

want to personalize my ELO?

Tile navigation:

- Create new tile
- Add search favorite
- Group tiles
- Change tile settings

Ribbon:

- Pin function
- Hide function text
- Pin function to the 'Favorites' tab

Viewer pane:

- Configure view profiles
- Change how entries are displayed

General settings:

- Configuration

Personal settings:

- Edit profile

want to create entries?

Folders:

- Create new folder
- Dynamic folder

Documents:

- Insert document

Metadata:

-

Metadata

- Personal data

want to update entries?

- Edit document
- Edit folder
- Check out to OneDrive
- Load new version

want to create tasks?

Workflows:

- Start workflow
- Start ad hoc workflow

Reminders:

- Create reminder

want to edit tasks?

Workflows:

- Show workflow
- Forward workflow
- Return workflow
- Delegate workflow
- Hand off workflow
- Postpone workflow

Reminders:

- Edit or delete

want to keep track of changes in ELO?

My ELO:

- 'My ELO' button
- News

Monitoring entries:

- Monitor changes
- Monitoring overview

Overviews:

- Workflows for this entry
-

Workflow overview

- Monitoring overview

Search:

- Save search
- Dynamic folder

want to output information from ELO?

- Send as ELO link
- Send document
- Save as
- Print document
- Create external link

want to search for entries?

- Search
- Search entries
- Search metadata

want to structure the repository area?

- Move
- Reference
- Copy
- Link

Start ELO

Method

1. Open ELO via the icon on the desktop.

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

The login dialog box opens.

If multiple repositories have been created, you can select the repository you want to log in to.

Information

The repositories that you can select are defined by your administrator. You can find more information for administrators in the [ELO Java Client administration](#) documentation.

2. Enter your ELO account name and password.

Optional: You can change the language in ELO with the drop-down menu.

Alternative: Under *Continue with*, select a different authentication method, e.g. *Microsoft*. If prompted, enter the relevant account data.

3. Select *Sign in*.

Result

ELO opens.

Change password

If you are logged in to ELO, you can change your password via *User menu [your name] > Change password*. You can do this as often as you like. To change your password, you need your old password.

Information

Follow the instructions for choosing a secure password in the *Change password* dialog box.

If your new password is rejected, it does not meet the minimum password requirements at your company.

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

New features

Version 25 LTS

- The Delete default index function is now displayed on the *Organize* tab in the ribbon.
- Automatic display adjustment: If dark mode is set in the system, the display mode in the ELO Java Client is automatically adjusted accordingly. This works the same way for contrast modes.
- Sensitivity levels: It is possible to set one of five sensitivity levels entries in the Metadata dialog box.
- Input assistant for the 'Server transfer' field in the workflow designer: This field is now a drop-down menu for selecting existing replication sets.
- 'Back' and 'Forward' now also work for navigation in a space.
- Breadcrumbs on display in the 'Tasks' work area: Tasks associated with entries that belong to a parent business object are now displayed with the path in the folder structure for easier navigation.
- ELO Assistant: The ELO Assistant allows you to analyze, edit, or use recognized document content in ELO with AI.
- Tab with business object metadata: An additional tab with the name of the metadata form linked to the business object appears in the viewer pane for entries within a business object. You can view and edit metadata for the parent business object here.

Workspaces

- Quick filters and status filters are available in all views.
- Global search
- Details for entries in the calendar view: You can display details about a calendar entry by hovering the mouse over it.
- Workspace configuration: *Parameters* and *Decision rules* areas were added.

Version 23.6

- New dialog boxes for folder selection: Affects various functions, e.g.: *File to ELO*, *Serial filing*, *Document from template*, *Reference* (in feed), *Dynamic folder*. In the new dialog box, the tree view of folders now appears where *History* and *Favorites* used to be.
- Spaces tiles in drag-and-drop tile overlay: Spaces tiles can be displayed in the drag-and-drop tile overlay. Entries that are moved to these tiles are stored in the document space (Teamspaces) or business object (Workspace) that was opened last.

Workspaces

- Filter menus can be opened and closed.
- 'Reset filters' button: If filters are set, a button for resetting all filters appears in the toolbar.
- Color status in Kanban boards: If colors have been assigned to the corresponding keyword list entries, these are visualized on Kanban boards.
-

Status and quick filters also remain active in other filter levels after restarting ELO as well as in other ELO clients.

Version 23.5

- The Clipboard can be synchronized across several clients.
- New login dialog box with ELO Modern Authentication: Login 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 login. However, they can still be enabled via the Enable roles function.

Workspaces

- Separate functions for creating business objects: Instead of the previous *New object* function, there is now a separate function for every metadata form that is permitted in the workspace. The names and tooltips for the functions can be defined in the workspace configuration.
- Role-independent creation of business objects: You can configure which actions and functions may be used by individual roles. Example: The *Member* role can only use the *New application* function, but not *New contract*.
- The workspace configuration is now divided into tabs (*Basic settings, Metadata forms, Views, and Filter trees*).

Version 23.4

- New 'Open with' function: Allows the user to select the program used to display/open a file.
- Save scans as a PDF: In scan profiles, you can choose TIFF, JPEG, and PDF as the format for saving a scanned document. The document is initially processed as a TIFF and is then converted to PDF after the pages are merged and separator pages are recognized.
- It is possible to search via business objects (regions).

Workspaces

- Flyouts: Flyouts are used in tables to show whether there are one or more relations on an entry. If there are multiple relations on an entry, the flyout shows the available relations in a drop-down menu. They are disabled by default in the workspace configuration. If the flyouts have been enabled, they are only shown in the workspace instance if there is at least one relation for the corresponding entries.
- Extended calendar view: In the calendar view, you can configure different/multiple date fields in different colors. This simplifies how information is presented and creates an overview without the user having to switch views.
- Quick filters: Quick filters are available above the table. They are a quick and simple method for filtering the data shown by specific criteria. Pre-defined options are possible. Quick filters can also be used in the calendar and dashboard view.
- Auto-refresh: When metadata is changed in the client, the tables, the kanban board, or the calendar for an object are refreshed automatically. The user no longer has to refresh manually and the context is retained.

Program interface

You can customize the program interface to meet your own requirements. You can change the font size and color scheme in the client.

Change font size

You will find the settings for the font size on the *Ribbon > User menu [your name] > Configuration > Display > Font*.

You can change the font size in the user interface with the slider. You see a preview of the selected font size to the right of the scale. To apply the changes, select *OK*.

Change color scheme

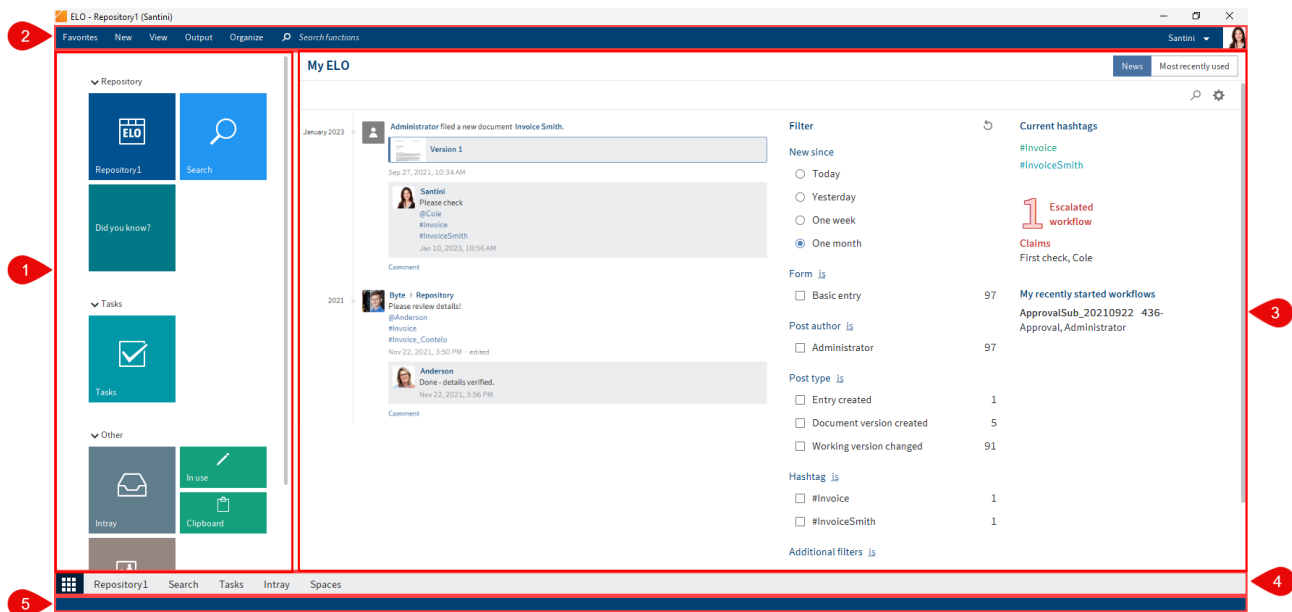
You will find the settings for the color scheme on the *Ribbon > User menu [your name] > Configuration > Color scheme*.

You see which color scheme is currently selected under *Color scheme*. To select another color scheme, click the desired color. To apply the changes, select *OK*.

Please note

The ELO Java Client restarts automatically if you change the color scheme or the font size.

The ELO Java Client opens to the *My ELO* work area. The areas are described briefly in the following.



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?

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: 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: 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: Folders and documents that have been checked out for editing are displayed here.

My ELO

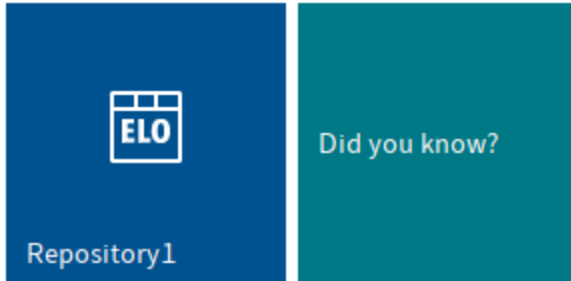
The screenshot displays the 'My ELO' work area. The left-hand navigation pane includes tiles for 'Repository 1', 'Search', 'Tasks', 'In use', 'Clipboard', 'Intray', and 'Clipboard'. The main content area shows a document 'Invoice Smith' with a 'Version 1' entry from Sep 27, 2021, and a comment from Santini. Below this is a 'Byte > Repository' entry from Nov 22, 2021, and a comment from Anderson. On the right, there is a 'Filter' section with options for 'New since' (Today, Yesterday, One week, One month), 'Form', 'Post author', 'Post type', and 'Hashtag'. A 'Current hashtags' section lists '#Invoice' and '#InvoiceSmith'. A red 'Escalated workflow' icon is present, along with a list of 'My recently started workflows' with their IDs and counts.

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.

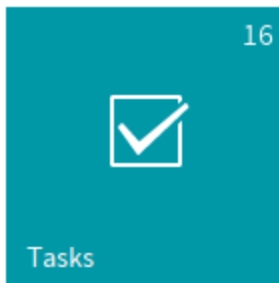
Tile navigation

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

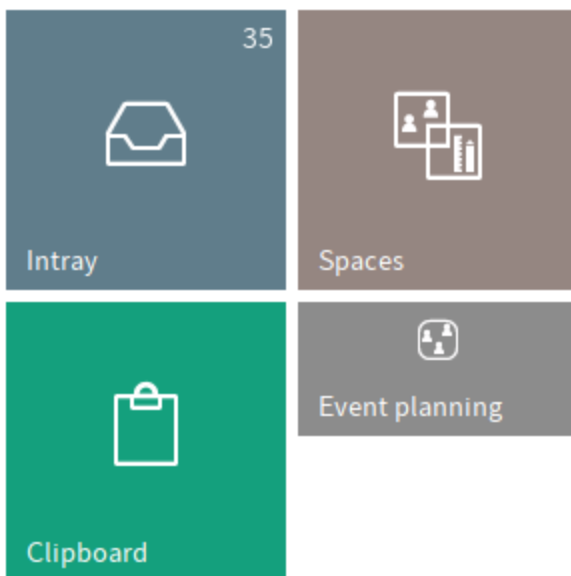
▼ Repository



▼ Tasks



▼ Other



➤ Hidden tiles

You can create tiles for quick access to folders, tasks, and searches. Use the function New view (available in: *Ribbon* > *View*).

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

Edit tile

You can make the following tile settings within the tile's context menu.

- 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.
- Show tile overlay in drag-and-drop
- Shrink/enlarge tile
- Hide: When you hide tiles, they are moved to the *Hidden tiles* area. To restore hidden tiles, drag them to the place you want in the tile navigation.
- Delete view (only for tiles you created yourself)

Under *Settings*, you can change the color, the icon, and the size of the tile.

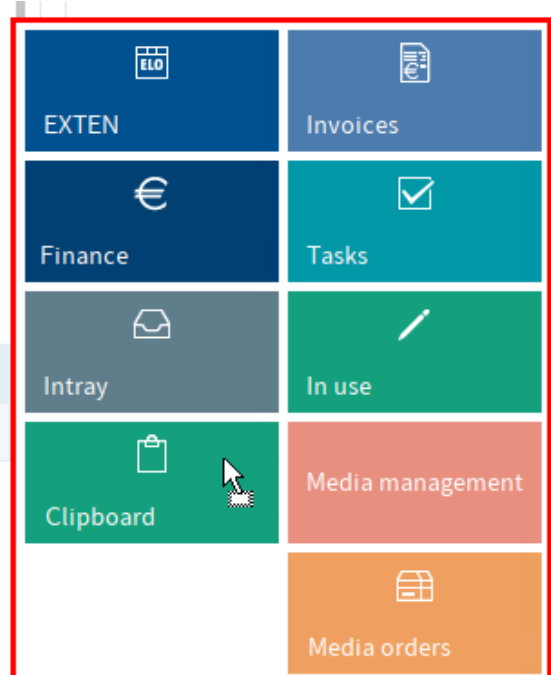
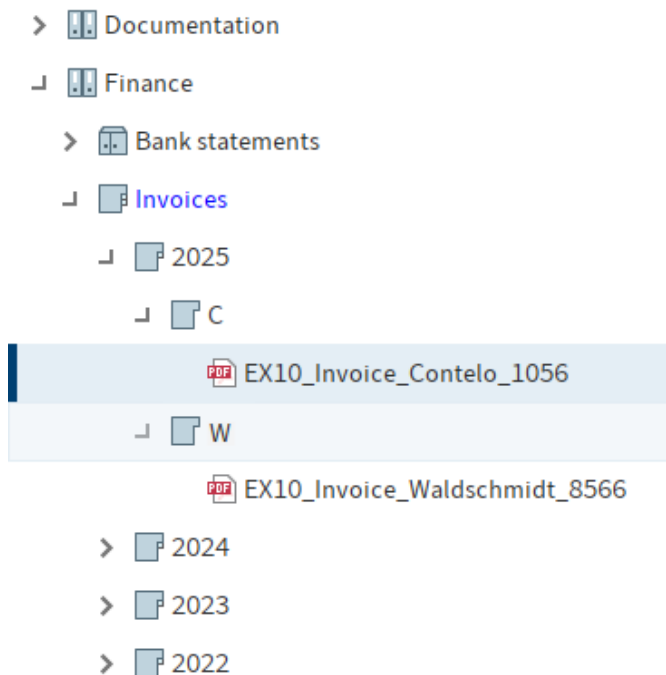
You can also enable the following options:

- Diagram view: If you enable this option, a circular diagram is depicted on the tile. Depending on the entries in that particular work area or view, the diagram is made up of several segments in different colors. The colors relate to the font color selected for the entries.

Information

The *Diagram view* option only works when the tile size is set to *Large*.

- Show tile overlay in drag-and-drop: 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.



Information

You can also use the tile overlay to store entries in workspaces and teamspaces.

To do this, you must first open the business object (workspace) or document space(teamspace) you want to store the entry in.

- Show number of entries: If this option is enabled, the number of entries in an area is displayed at the top right of the tile. This option is particularly useful in the *Tasks* work area. If the number next to the *Tasks* work area is green, you have at least one new task.
- Keyboard shortcut to open the tile

Please note

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

- Change name: You can change the name of tiles you created yourself (repository views and task views). Select Edit view.

Information

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

The changes are saved automatically.

Close the tile settings by clicking the selected tile or the button with the left arrow.

You can open the tile settings for another tile by clicking the other tile.

Groups

To sort your tiles by topic, you can create groups.

Right-click in the tile navigation or on a group name to create a new group.

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

Open the context menu of a group name to edit the group:

- Rename group: This function is only available for your own groups.
- 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. In the dialog box, you can choose between:
 - Default settings: Restores all settings in the tile navigation area to the default values on installation.
 -

Same settings as at the start of the current session: Discards all changes made since the last time you started ELO. Changes made prior to that session are retained.

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.

Information

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

The *News* tab contains the following areas and functions:

Settings (gearwheel icon): You can edit the following settings here:

- My ELO
- Subscribed hashtags
- Polls started

Current hashtags: Here, you can see hashtags that have been used in recent weeks. Select a hashtag to show all posts marked with the hashtag.

Substitution: If you have any active substitutions, you can see who you are substituting for here and who is currently substituting for you.

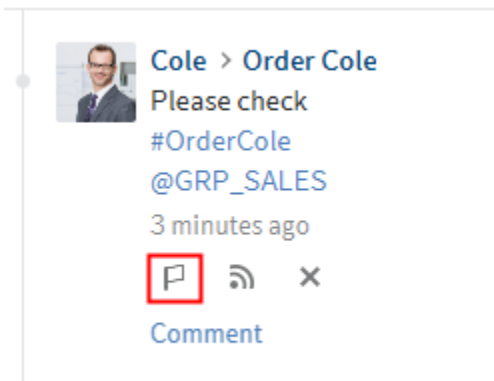
Workflows: Under *Workflows*, you can see all workflows you are involved in. Workflows with passed deadlines are highlighted in red. Select a workflow name to go to the respective workflow in the *Tasks* work area.

Information

If the preview in *My ELO* is not large enough to show all areas, buttons appear in the toolbar for the respective areas.

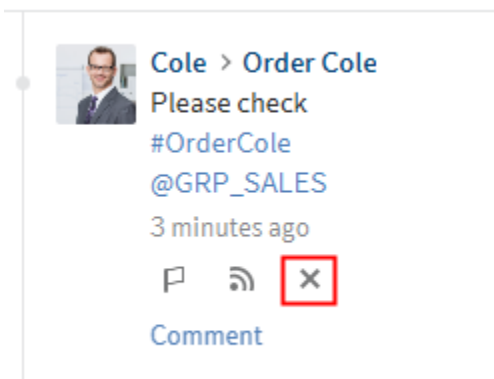
Feed functions in My ELO

Mark post as important



Posts older than one month are removed from *My ELO*. The *Mark as important* button (flag icon) lets you pin a post to the *My ELO* work area or remove it again. The post remains in the *My ELO* area even if it is more than a month old.

Hide post



You can hide the post within your *My ELO* work area. Select the X icon below the post.

Information

The *Remove from My ELO* function only hides posts in your *My ELO work* area. The post is not deleted. It stays in the feed for the corresponding entry.

If you hide a post, the *Undo* function is displayed. Select this button to show the post again.

The *Undo* function is only displayed for 5 seconds by default. You can change the length of time it is displayed in *My ELO > Settings > My ELO settings*.

Alternative: To hide all posts in *My ELO*, use the *Remove all posts from My ELO* function. You will find this function in *My ELO > Settings > My ELO settings*.

Information

Posts marked as important are not removed.

Filters

You can search the feed in the *My ELO* work area for specific terms (magnifying glass icon) as well as filter it by specific criteria. You can select the following filters:

- New since
- Space
- Metadata form
- Post author
- Post type: You can filter by two post types: Automatically created posts (e.g. *Document version created*) and posts created by users (*User posts*).
- Hashtag
- Additional filters: Depending on the settings, additional filters are available, e. g. filter by posts you are mentioned in.

Information

In the default settings, all filters are applied in *is* mode. You can also set the filters to *is not* mode. To change this mode, select *is/is not* next to the filter category.

Reset filters: To reset all filters, select the *Reset filters* button (arrow icon).

Most recently used

The *Most recently used* area contains a list of entries that you recently viewed or edited. Click an entry to go straight to its filing location in the repository.

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

Under *User menu [your name] > Configuration > Display > List of recently used entries*, you can configure how many entries the list should contain and when a selected entry should be added.

Repository

You can manage all folders and documents filed in ELO in the *Repository* work area.

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

The screenshot displays the ELO Java Client interface. On the left, the **Repository** pane (marked with a red circle '1') shows a hierarchical tree of folders and documents, including 'Scanned documents', 'Barcode documents', and 'Invoice Contelo GmbH'. The main area (marked with a red circle '2') shows the **Invoice Contelo GmbH** document. The invoice includes a barcode, company information for ELO Digital Office GmbH, and a table of items with columns for Pos., Item no., Description, Quantity, Unit price, Net, VAT, VAT amount, and Gross. The total amount is 3,197.50 €.

Pos.	Item no.	Description	Quantity	Unit price	Net	VAT	VAT amount	Gross
1	A000-PO-EN	ELOOffice brochure	50	0.75 €	37.50 €	19%	7.13 €	44.63 €
2	A000-PP-EN	ELOprofessional brochure	50	1.35 €	67.50 €	19%	12.83 €	80.33 €
3	A000-PE-EN	ELOenterprise brochure	50	1.85 €	92.50 €	19%	17.58 €	110.08 €
4	A000-BAPEN00	ELO pen	900	1.75 €	875.00 €	19%	166.25 €	1,041.25 €
5	A000-QUAD-00	ELO notepad	500	4.25 €	2,125.00 €	19%	403.75 €	2,528.75 €
Total amount					3,197.50 €		607.53 €	3,805.03 €

On the right side of the viewer pane, there is a version history section showing three versions of the document, with the most recent being Version 3, saved by Administrator on Apr 12, 2018, at 5:25 AM.

1 Repository structure: Overview of entries (folders or documents)

2 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*.

If there are a lot of documents in your repository, it can be helpful to create an additional view. A view shows a section of the repository. It is also shown as a tile in the tile navigation.

To create a new view, select a folder in the *Repository* work area. On the ribbon, select *View > New view*. The *New view* dialog box opens. The name of the selected folder is entered by default. If required, change the name of the view. Select *OK*.

Search

In the *Search* work area, you can search for files and documents in ELO. The search results are displayed here. You can create search favorites and search views.

The screenshot shows the ELO Java Client interface with the Search work area active. The ribbon includes 'Search functions' and 'Search'. The search results list on the left shows 'EX10_Invoice_Contelo_0753' selected. The main view displays the invoice content, including the EX10 logo, company address, and invoice details.

Search Results List:

Type	Short name	Date
[Icon]	[Redacted]	Jul 5, 202
[Icon]	[Redacted]	Jul 31, 20
[Icon]	[Redacted]	Jul 5, 202
[Icon]	[Redacted]	Jan 6, 202
[Icon]	[Redacted]	Jan 3, 202
[Icon]	[Redacted]	Nov 22, 21
[Icon]	EX10_Invoice_Contelo_0753	Nov 22, 21
[Icon]	[Redacted]	Nov 2, 20;
[Icon]	[Redacted]	Nov 2, 20;
[Icon]	[Redacted]	Oct 28, 20
[Icon]	[Redacted]	Sep 14, 20
[Icon]	[Redacted]	Mar 17, 20

Invoice Content:

EX10 Ltd.
42 Winchester Road
Bournemouth
BH1 1AL
contelo@ex10.com
<http://www.ex10.com>
+44710101010

EX10 Ltd. - 42 Winchester Road - Bournemouth BH1 1AL
Contelo Ltd.
Street address 100
Anytown 58100

Invoice

Invoice number	EX10-2112
Date	11.03.2019
Order number	00634
Customer number	0005670

Order date 06.03.2019
Account manager Madam Hazel Allen
Employee Madam Annie Kowalski

Dear Sir or Madam,
Please find enclosed your invoice for 200 high-gloss brochures totaling €149.90.
Please transfer the invoice amount to the account below.
Sincerely,

When you open the *Search* work area, an additional *Search* tab appears on the ribbon. The *Search* tab contains different functions, such as for searching the metadata, creating search filters, and adding search favorites.

Information

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

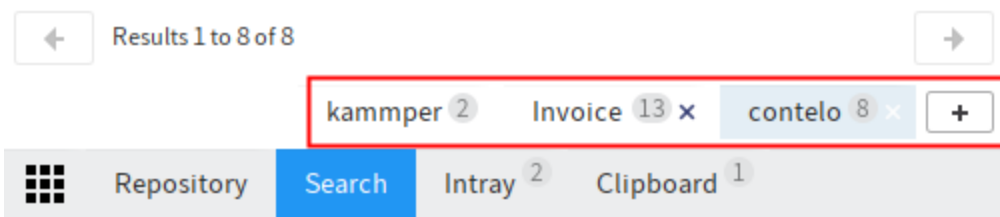
The Search entries chapter contains information on how to search the metadata using a form or create a dynamic folder.

Information

You can specify a keyboard shortcut that takes you straight to the search input field from a work area. Create a keyboard shortcut for the function *Switch to search input field* (available in: *Ribbon > User menu [your name] > Configuration > Quick access to functions*). For more information, refer to the chapter Configuration.

Create search view

The *New view* function (plus icon at the end of the search results list) in the *Search* work area enables you to 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.

Information

Metadata searches are automatically saved as a temporary search view.

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 under *Ribbon > Search > Search favorites*).

ELO iSearch functions

ELO iSearch uses special search algorithms that improve the search function.

iSearch offers the following functions:

Autocomplete

The autocomplete function provides a list of possible search terms that fit the character sequence already entered. The longer the term you enter, the more exact the suggestions are. ELO iSearch only suggests terms for matches in ELO. If no suggestions appear, there are no matches for the character string entered. To search for a suggestion, double-click on the term.

Autocorrect

Autocorrect provides suggestions for search terms which return very few or no results. This can be especially useful if you made a typing error while entering the search term. If this is the case, ELO will suggest similar terms. A message appears underneath the search field: "Did you mean... " followed by the suggestions generated by ELO. Click on one of the suggested terms to show the search results for the chosen term.

Linking search terms

The Boolean search function, a form of complex search, enables you to formulate search queries using the AND and OR operators.

AND connections search for matches that contain both terms.

The operators for an AND search are:

- AND
- &&

Information

The AND connection is enabled by default. If you enter more than one term, the terms are automatically linked with AND unless you use another operator.

OR connections search for matches that contain at least one of the terms.

The operators for an OR search are:

- OR
- ,
- ||

Example: Order, Invoice

Please note

If you search for NOT, OR, or AND via the search field or filters, you may encounter issues during your search.

Logical parentheses

You can use logical parentheses to enter an alternative search string. Parentheses determine which terms to search for in addition to the actual search term.

For example, you may be searching for an invoice, but you are not sure if it was filed as an invoice, bill, or receipt. In this case, enter the term which should first be used to search and then add the two alternative terms in parentheses. I.e.: invoice (bill, receipt).

Exclude terms

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, if you search for the term *invoice* and exclude the term *receipt*, you must enter the following search command: invoice -receipt.

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.

Range search

The range search enables you to limit the search to a specific range. This makes the search faster and significantly increases the accuracy of the results.

You need to enter the ranges in square brackets and separate them with T0. For example, you want to search all folders in the range 03 to 05. Enter the search command [03 T0 05].

Search for alternative terms

ELO iSearch provides alternatives (synonyms) for many terms. Enter a space after the search term. ELO iSearch suggests corresponding synonyms if any are available. To add a synonym to a search, click the desired suggestion.

Wildcard search

It is also possible to use the placeholder (wildcard) *, as is common in other Windows programs, in the search. This means you can use the * placeholder to search for sequences or character strings.

Information

You can use a question mark as a wildcard. However, you will then need to enter your search term in lowercase letters. The question mark can only be used as a wildcard at the end of a word.

Search for sequences

There are several possibilities for this type of search, which will be explained with the following examples:

Let us assume you are looking for companies with "ow" in the name. Enter *ow* in the *Company* field of the search form. The search will return all documents containing the letters "ow" in the company name, e. g. Owen, Townsend, etc. In other words, the search looks for the range between the two asterisks.

Search "Beginning with" or "Ending with"

If you omit either of the limits marked by the *, you will define a search as *beginning with* or *ending with*. This search option can be set as the default in the metadata forms. However, the option is not visible in the metadata form.

For example, you want to search for orders with an order number starting with 15. To do so, enter 15* in the search form in the *Order number* field. ELO finds all documents in which the entry in the *Order number* field begins with 15. If you enter *er in the *Company* field, all the documents that have er at the end of the entry in the *Company* field will be found.

Information

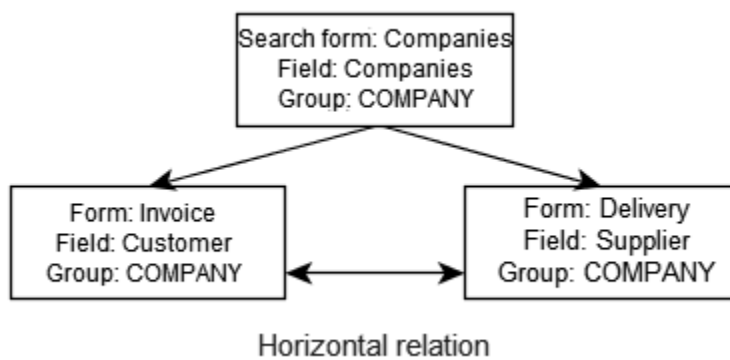
You do not need to use the wildcard * in the *Short name*, *Date*, or *Extra text* fields. ELO displays all documents that contain the character string in the field in whatever form.

Universal search

ELO lets you perform a universal search for certain attributes. This applies to all fields that use the same group as well as fields that have an identical component in the group name.

If you want to search multiple metadata forms, the group names of the fields on different keywording forms have to be identical. Using the same group creates a horizontal relation between the fields.

Identical group



Example: All numbers

The universal search can also be used if multiple fields do not use completely identical group names. However, all fields in the group name must have an identical component at the beginning of the group name.

This is useful, for example, for a universal search for numbers. Please take the following into account:

Fields for numbers must use a common characteristic (for example: *NO*):

- Invoice number field: *NOINV* group
- Order number field: *NRAUFTR* group
- Supplier number field: *NOSUPPL* group

The search form requires a field (*All numbers*, for example) that uses *NO** as a group name.

If you use this search form with the *Search metadata* function, you can perform a universal search for all numbers.





For example, if you enter *2** as a search term in the field on the search form, ELO finds all documents that contain a number in the metadata that starts with 2.

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 indicated by a red icon with a white exclamation mark. New unread tasks are indicated by a green dot. You can mark a task as unread via the context menu (right-click or MENU key).

The option *Show tasks due in the following number of days* enables you to specify how many days in advance tasks should be shown in the task list. You will find this option under *Ribbon > User menu [Your name] > Configuration > Display > Task list display options*.

For a better overview, you can sort and filter your tasks according to your needs.

You can sort the column by clicking the column heading. Clicking once sorts the items in ascending order. Clicking a second time sorts the items in descending order. Clicking a third time clears the sort order.

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

Tasks

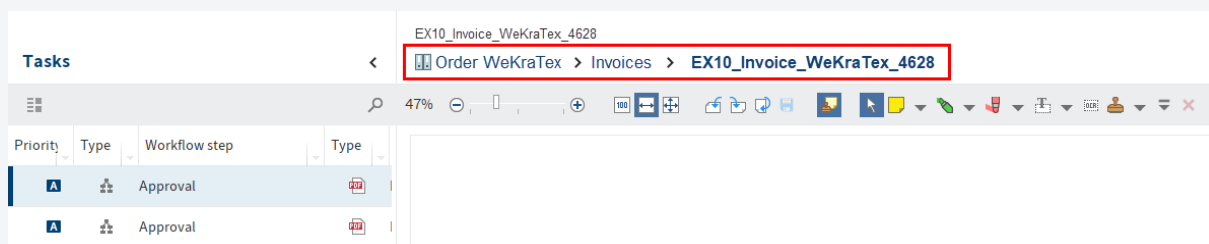
Priority	Type ▼	V
A	all	Qt
A	Custom...	nc
A	Workflow	Zt
A	Form	
A	Reminder	

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.

Information

A breadcrumb is shown in the preview area for tasks for entries in a business object.



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

- Workflows:
 - Actively: You forward the workflow using the form (*Form* or *Metadata* tab) 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*).

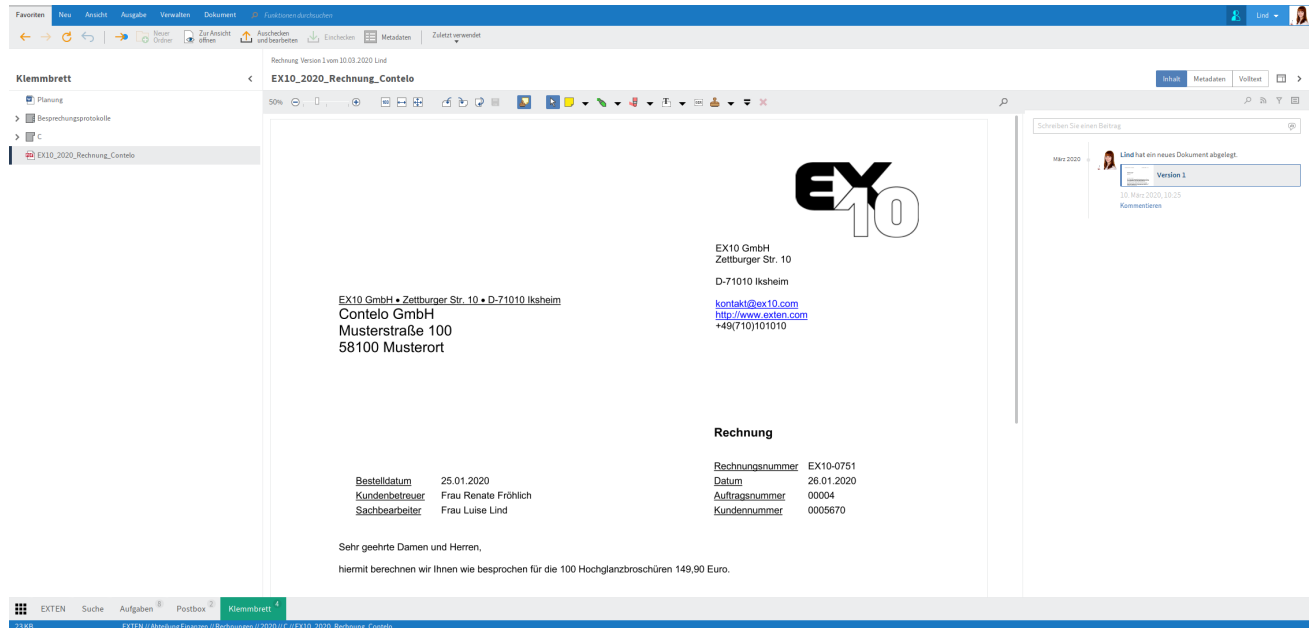
You will find more information here:

- Complete tasks with workflows
- 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*).

Information

If you use additional ELO clients, the Clipboards are synchronized. Switching between the individual clients, you will always find the same entries.

In use

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

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

The screenshot shows the ELO Java Client interface. The top menu bar includes 'Favorites', 'New', 'View', 'Output', 'Organize', 'Document', and a search field. Below the menu is a navigation bar with 'Recently used' and a dropdown arrow. The main workspace is divided into three sections:

- Left sidebar (In use):** Shows a list of documents. The selected document is 'Multipage order 2(TIF, BW, 200 DPI)' with status 'Unprocessed'.
- Center pane:** Displays the document content. It includes a header 'Invoice Version 3 of May 30, 2018 Administrator', a table of items, and a list of versions. The table has columns: Pos, Item no., Description, Quantity, Unit price. The versions list shows 'Version 3 Approval' (May 30, 2018, 5:05 AM) and 'Version 2 Updated' (Mar 5, 2018, 4:11 AM).
- Right pane:** Shows a chat or notification area. It includes a 'Create a post' field and several messages: 'Cole is editing the entry.', 'Administrator saved a new working version of this document.', '@Byte Can you check if the invoice has been paid?', and 'Farrell saved a new working version of this document.'

The bottom status bar shows '1 of 2 documents selected' and the current path: 'Repository // Documentation // Sample documents // Multipage order 2(TIF, BW, 200 DPI)'.

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.

To transfer checked out entries back to ELO, you must check the documents in (*Ribbon > Document*). Once you check an entry back in or cancel editing, it automatically disappears from the *In use* work area.

Intray

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.

The screenshot displays the ELO Java Client interface. At the top, there is a ribbon with tabs: Favorites, New, View, Output, Organize, Document, and File. The 'File' tab is active, showing various actions like Scan pages, Scan document, Scan, Join pages, Split pages, Join, Metadata, Edit document, Edit, File to ELO, Filing, and Transfer. Below the ribbon, the 'Intray' work area is visible, containing a table of files:

Typ	Short name	File date
[EX10_2020_Invoice_Contelo.docx]		Mar 30, 2020, 2:0...
[Multipage order 2(TIF, BW, 200 DPI).TIF]		May 30, 2018, 5:...
[Scan_20200513840284.tif]		May 12, 2020, 11...

To the right of the file list, a 'Basic Entry' for 'Multipage order 2(TIF, BW, 200 DPI)' is shown, including 'Version control enabled' and 'Date May 30, 2018, 5:05 AM'. Below this, a document viewer displays a scanned document with the ELO Digital Office logo and contact information:

ELO Digital Office GmbH
 Heilbronner Str. 150
 D-70191 Stuttgart
 Elm St. 654
 Anytown, 12345

info@elo.com
<http://www.elo.com>
 +49 (711) 806089-0

Invoice

Invoice number	2010.100
Date	10/02/2013
Order number	2010.01.03100
Customer number	11100

At the bottom, the status bar shows 'Repository Search Tasks 11 Intray 3' and 'Multipage order 2(TIF, BW, 200 DPI).TIF 164.3 KB'.

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. The *File* tab 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. The documents 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.

For more information, refer to the Scan a document to the Intraday and file it and File entries via the Intraday chapters.

Spaces

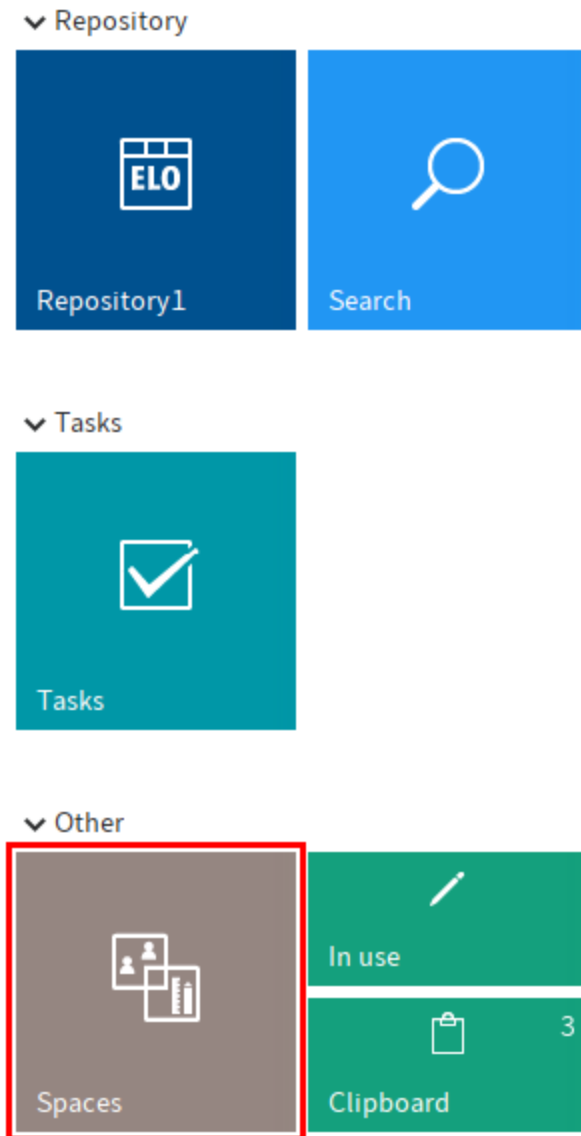
Spaces are areas where you can collaborate with other users. You can file new entries and work on them with members of the space.

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.

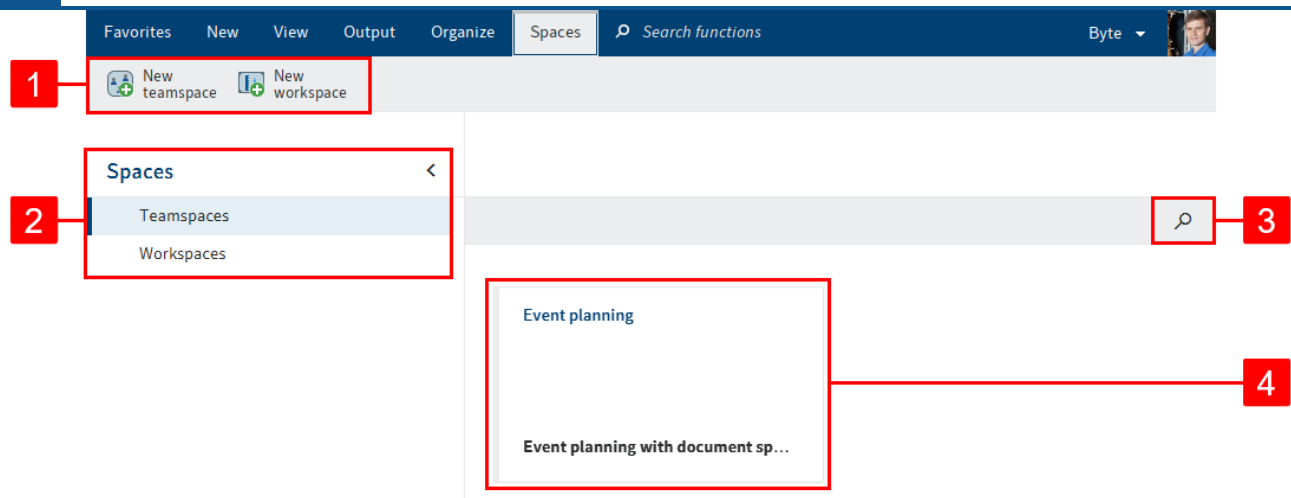
The *Teamspace* function enables you to collaborate across teams. All teamspace members can gather and edit documents together and exchange information using the feed.

For more information, refer to the Workspaces and Teamspace chapters.

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.



In the overview of spaces, you have access to the *Spaces* tab.



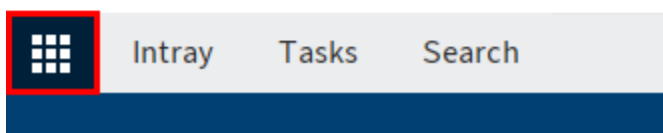
You have the following options:

- 1 Create a new teamspace or a new workspace: If these buttons are disabled, there are no teamspace templates or workspace types available for creating new spaces.
- 2 Switch between the teamspaces and workspaces
- 3 Search for teamspaces or workspaces: The number of tiles decreases in accordance with your search query.
- 4 Navigate to a teamspace or workspace: They are shown as tiles and sorted by creation date.

'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.

Information

Alternatively, you can use the keyboard shortcut CTRL+Windows to open the *My ELO* area.

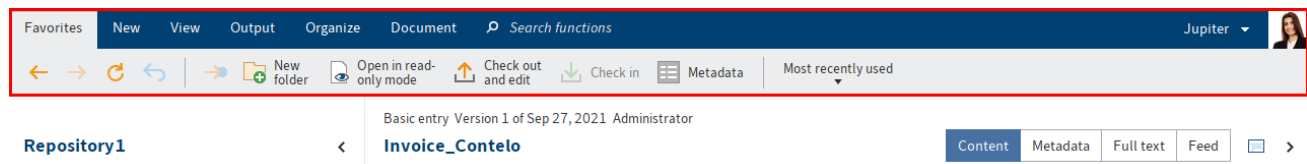
Here, you will find your news and most recently used entries, as well as the tile navigation.

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

The ribbon provides access to different functions in ELO.



Information

Some functions can also be run from the context menu. Right-click an entry in ELO to open the context menu.

Tabs

The ribbon is divided into tabs that group the functions. Use the tabs to switch between the menus. Some tabs are always shown (default tabs), while others only appear when the tab functions can be used (contextual tabs).

To improve usability, some tabs are only shown when needed. For example, the *File* tab is only shown when you are in the *Intray* work area.

The default tabs are:

- Favorites: This tab contains frequently used functions that you want to access quickly. You can add other functions.
- New
- View
- Output
- Organize

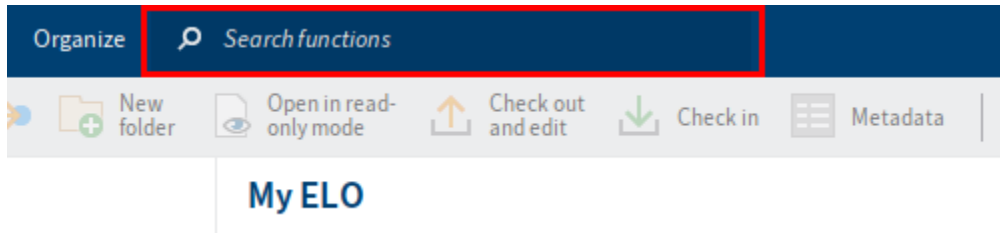
The contextual tabs are:

- Document: This tab appears when you select a document.
- Task: This tab appears when you click the *Tasks* work area.
- Search: This tab appears when you click the *Search* work area.
- File: This tab appears when you click the *Intray* work area.
- Copy/Paste: This tab opens when you click the *Copy* function.
- Reference: This tab opens when you click the *Reference* function.
- Move: This tab opens when you click the *Move* function.
- Attach pages: This tab opens when you click the *Attach pages* function.

Functions

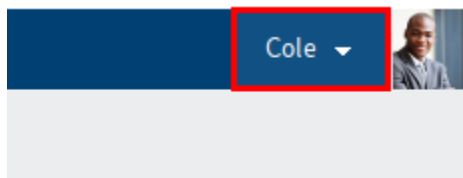
The functions are arranged logically by relation. The most important functions are pinned to the ribbon. Others can be found in drop-down menus. If a function is grayed out, you cannot use it at your current position in ELO.

Search functions



Use this field to search for functions on the ribbon. You can execute the functions by clicking them or by using the displayed path (e.g. *Organize//Structure*). Functions that are not available in the current context are grayed out.

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 out at the end of your session here.

In addition, the *About* dialog box contains program information, e.g. the version numbers of the ELO Java Client and ELO Indexserver. The version number is particularly important for support requests.

You can find more information in the following chapters:

- Customize settings
- Profile
- Substitution rules

Profile

Under *User name [your name] > Edit profile*, you can enter information on your professional background, your contact details, and upload a profile picture.

Administrators with the *Edit user data* right can change images for other users.

Information

You can view other user's profiles by clicking on their name or profile picture in a feed post.

You can access the group profile via the feed if the group has been mentioned.

Edit profile picture

Select *Edit profile picture* to open edit mode. In edit mode, you can change or delete your own profile image.

Under *Select picture*, you can open a dialog box to select a file from the file system. Select an image file to use as your profile image.

Information

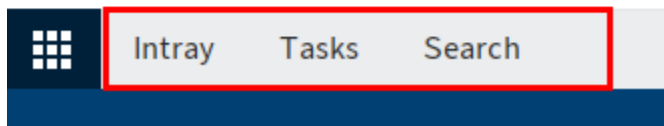
Use PNG, JPG or GIF image files with a minimum of 280 x 280 pixels. If ELO is unable to process the format or the size of the selected image, a message will appear at the bottom of the dialog box.

For larger images, you can hold down the left mouse button to drag and select the desired section of the image.

Navigation bar



> Hidden tiles

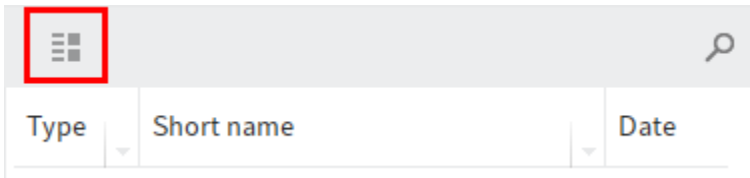


The navigation bar provides quick access to several areas and shows you which area you are currently in.



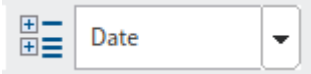
Hold down and drag with the left mouse button to move the individual areas on the navigation bar.

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

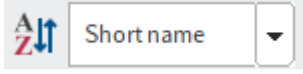
Toolbar



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: The entries are displayed as a table.
 - Restore table columns: Use this function to restore the default settings of the table columns in a work area. Manually set filters and sort orders are removed.
 - Copy table to clipboard: Use this function to copy the currently selected table entries to the clipboard. The entries can then be inserted into an external program, e. g. Microsoft Excel.
-  List: The entries are displayed as a list.
 - Thumbnails: Use this function to enable a thumbnail view of the list of entries. You can use the slider to adjust the size of the thumbnails.
 -  Group:

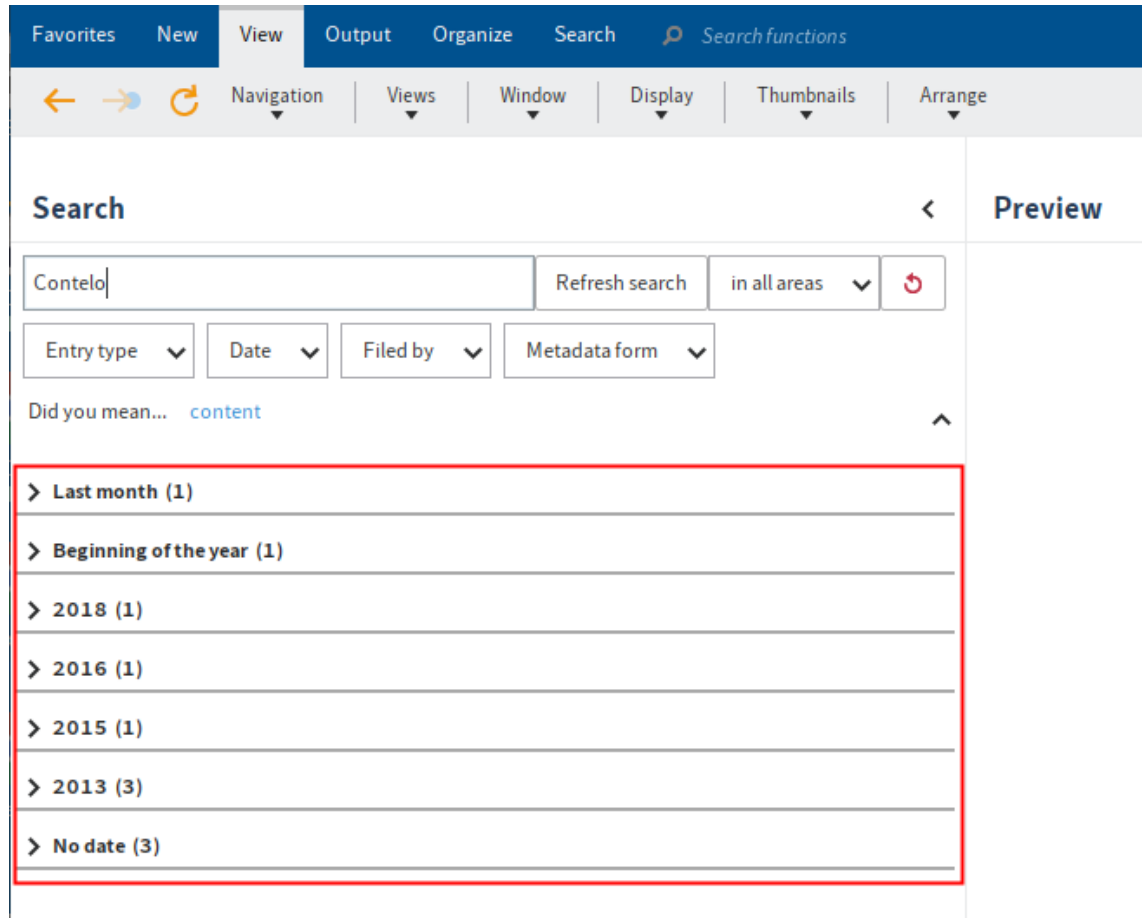
Use this function to sort the list of entries in the list and tile view. Use the *Group* drop-down menu to select whether to group the list by *Date*, *Filing date*, *Type*, *Filed by*, or *Metadata form*.


The entries are grouped by categories, e. g. by the year in which they were filed. This function can be combined with the *Sort order (search results)* function.
 -  Sort order:

Use this function to sort the list of entries in the list and tile view in the *Repository* and *Search* work areas. In the *Sort order* drop-down menu, you can select whether to sort the list by *Date*, *Filing date*, *Type*, *Filed by*, *Short name*, or *Metadata form*. This function can be combined with the *Group* function.
 - Expand/Collapse: Use this function to change how entries are displayed in the list and tile view in the *Repository* and *Search* work areas. You can select filter criteria for both views via the *Sort order* and *Group* drop-down menus. The *Expand/Collapse* function enables you to switch between the view of the parent filter criteria and a view of the search results associated with the filter criteria.


Information

The function is only enabled if the entries are displayed in a list or tile view. In addition, at least one *Group* filter criterion must be selected in the drop-down menu.



-  Tiles: The entries are displayed as small tiles.

- Thumbnails: See details under *List*
- Group: See details under *List*
- Sort order: See details under *List*
- Expand/Collapse: See details under *List*

-  Tree (search results only): This function displays the search results in a tree structure. The tree structure is created according to the selected tree view. Use the *Edit tree structures* function to define different tree views. The tree structures offer various sorting options for documents displayed in the *Search* work area.

- Edit tree structures: The *Edit tree structures* function enables you to change the tree view in the search. You can create and edit different tree structures. A tree structure

enables you to specify which sections of the tree view to include in the search results. For example, you can sort the list of search results by status.

The following options are available:

Name: Enter a name for the tree structure.

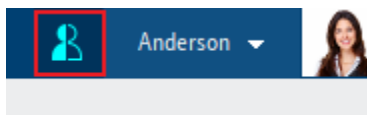
Metadata form: Select a metadata form from the drop-down menu.

Show empty fields: Enable this option to also see metadata fields that do not contain any information. These fields contain spaces.

Fields: Select the fields you want to use for sorting the results.

Use the *Add*, *Delete*, and *Edit* functions to create and edit tree structures.

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

Multiple windows

You can display ELO in multiple windows.

Use the *Open a new window* function (available in: *Ribbon > View > Window*) to open a second ELO Java Client window.

Select the *Show side by side* function to view two ELO windows beside one another.

Information

If you don't already have a second window open, this function automatically opens one.

Select the *Show stacked* function to view two ELO windows beside one another.

Navigation and use

This chapter provides information about the general use of ELO.

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 Program interface > My ELO 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*. 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.

You will find a list of keyboard shortcuts defined in the standard version in the Accessibility chapter.

Additional navigation options

You can navigate using the following functions in the *View* tab:

- **Go to:** Opens the filing location of the currently selected document or folder. Use this function to open the filing location of an entry in the list of search results, for example.
- **Back/Forward:** Use this function to go one step back or forward in the viewing history of the document that you opened last. *Forward* requires you to have used the *Back* function at least once.
- **Go to top level:** Takes you to the top level of the *Repository* work area.

How do I use a function?

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, select 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.

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.

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.

How do I select multiple entries?

In some contexts, you have the option to select multiple entries.

If you want to select several entries that are not directly below one other, press the CTRL key and click on the entries one after the other.

If you want to select several entries that are directly below one other, press the SHIFT key and click on the first and the last entry.

Information

In the tree navigation in the *Repository* work area, you can only select one entry at a time.

Keyboard control

You can largely operate the ELO Java Client using the keyboard.

Use the TAB and arrow keys to navigate. TAB + SHIFT returns the focus to the previously selected element.

Use the ALT key to go to the ribbon.

To select functions, tiles, and entries, use the SPACE bar and ENTER key.

You can exit larger text fields with TAB + CTRL.

You can define keyboard shortcuts for work areas and functions. For more information, refer to the *Accessibility > Keyboard shortcuts* and *Customize settings > Quick access to functions* chapters.

Refresh

The *Refresh* function (keyboard shortcut: F5 key) updates the view of the current work area. The data is reloaded from the server.

Undo changes

With the *Undo* function (available in: *Ribbon > Organize > Delete*), you can undo the last editing step. This function is only available for move, referencing, and delete actions, as well as for editing the metadata in the *Repository* and *Intray* work areas.

Keyboard shortcuts for quick selection

You have the option to quickly navigate to folder entries in the repository.

Method

1. Open the folder in the tree view and set the focus on the folder.

Alternative: Select an entry in the viewer pane of the folder.

2. Type in the first letters of the entry name.

The first entry that starts with these letters is selected. If the first entry that is selected isn't the right one, you can navigate to it with the ARROW keys.

How do I open the 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 open the in-program help using the F1 button.

User feedback

Under *User menu [your name] > User feedback*, you can write feedback on the program and send it to ELO.

Select *Privacy Policy* to read about data protection. To see a preview of your feedback message, select *Preview*.

Accessibility

Contrast settings

There are five display modes in the ELO Java Client. The ELO Java Client also has a dark mode as well as a light and a dark contrast mode. The high contrast modes are an accessibility feature. The *Default* mode adjusts the display within ELO according to the settings of your operating system.

You can find more information in the section [Color scheme](#).

Information

How documents are displayed in the viewer pane depends on the settings of your desktop programs.

Keyboard shortcuts

You can switch to certain areas and access functions using keyboard shortcuts. The following tables contain an overview of the keyboard commands you can use.

You can adjust the keyboard shortcuts in the configuration. For more information, refer to the [Assign keyboard shortcuts to functions](#) section.

Information

The keyboard shortcuts to open the in-program help and the configuration cannot be changed.

General

Function	Keyboard shortcut	Note
<i>My ELO</i> work area	CTRL + WINDOWS	
<i>Repository</i> work area	CTRL + 1	
<i>Search</i> work area	CTRL + 6	
<i>Tasks</i> work area	CTRL + 4	
<i>Clipboard</i> work area	CTRL + 3	
<i>In use</i> work area	CTRL + 5	
<i>Intray</i> work area	CTRL + 2	
Help	F1	invariable
Configuration	F12	invariable
About	CTRL + I	
User feedback	F11	

Function	Keyboard shortcut	Note
Close	CTRL + Q	

Functions

Function	Keyboard shortcut
Metadata	F4
Refresh	F5
Print document	CTRL + P
Send document	CTRL + M
Open in read-only mode	CTRL + O
Check out and edit	ALT + O
Edit document	CTRL + E
Check in	ALT + I
Document from template	CTRL + N
Create a new view	ALT + N
Delete	CTRL + DEL
Save as	CTRL + S
Search metadata	CTRL + F
Search on the ribbon	ALT + M
Collapse/expand ribbon	CTRL + F1
Start ad hoc workflow	CTRL + W

'Repository' work area

Function	Keyboard shortcut	Note
Navigate in the tree view	UP ARROW or DOWN ARROW	
Open folder	RIGHT ARROW	
Close folder	LEFT ARROW	
Switch between the tabs <i>Content</i> , <i>Metadata</i> , and <i>Full text</i>	CTRL + TAB	Only works if the focus is on the feed.

'Intray' work area

Function	Keyboard shortcut
Join pages	CTRL + K
Split pages	CTRL + T

'Metadata' dialog box

Function	Keyboard shortcut	Note
Enter metadata using the most recently saved/ displayed entries	F3	
Open keyword list	F7	Only for fields with keyword lists.
Pin entry to field	F8	Only in the In tray.
Use last entry	F9	
Expand keyword list automatically	CTRL + K	
Undo last action	CTRL + Z	
Redo the last undone action	CTRL + Y	
Insert pilcrow character (¶) as a separator	CTRL + P	Only in input fields and keyword lists.
Load metadata	CTRL + L	
Save metadata	CTRL + S	

Login dialog box**Function Keyboard shortcut**

Profiles CTRL + P

Important components

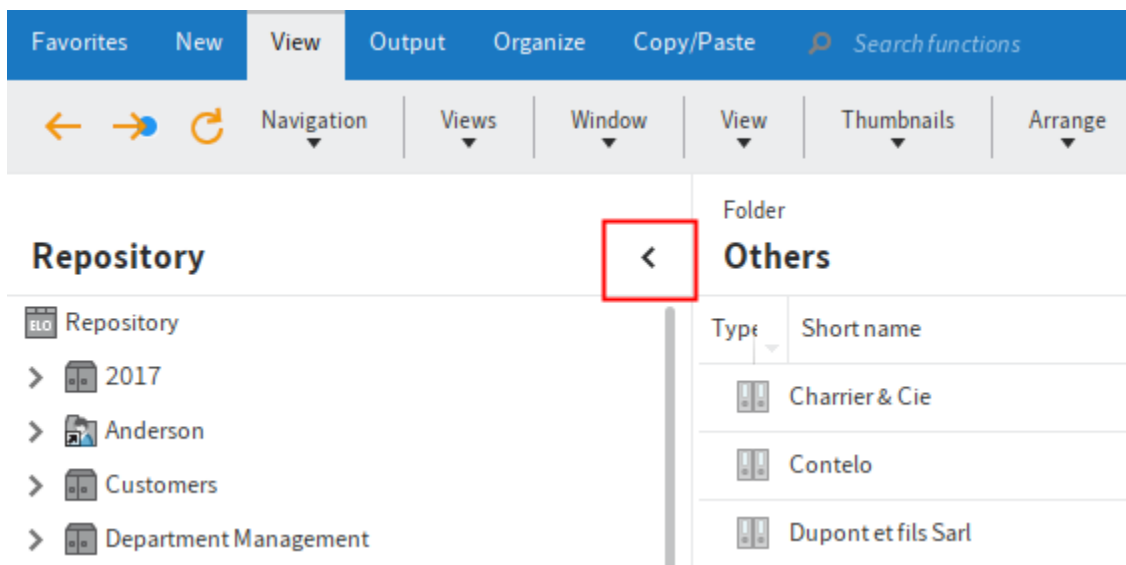
Repository structure

Navigate between entries in the repository structure.

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.

Change layout

You can change the layout of the repository structure in the *Repository* work area.

You will find the layout settings on the *Ribbon > User menu [your name] > Configuration > Display > Layout options*.

You see which layout is currently selected under *Layout options*. Select the corresponding radio button to switch to a different layout. To apply the change, select *OK*.

The following layouts are available for displaying folders and documents in the *Repository* work area:

-

- Tree only
- Tree and table

Information

With the *Expand branch* function (available in: *Ribbon > View > Arrange*), you can open the child entries of a selected folder. All existing child entries are displayed.

Tree only

The screenshot displays the ELO Java Client interface. The top ribbon includes menus for Favorites, New, View, Output, Organize, Document, and Search functions. Below the ribbon are icons for Open in read-only mode, Check out and edit, Edit document, Check in, Versions, Approval, Verify, Convert, Margin notes, and Attachment.

The left pane, titled "Repository", shows a tree structure of folders and documents. The selected folder is "[6] [Administrator] Letter - Renz Note". The right pane displays the content of the selected document, which is an email titled "Letter - Renz Note".

The email content includes:

- Sender: Sandra Renz, 12 Seacrest Drive | 79999 Hamberg
- Recipient: Altustrics Inc., 600 Outremer St., River port, LA 19384
- Date: October 10, 2013
- Subject: RE: Office furniture tender
- Body: To whom it may concern: I wish to thank you greatly for the prompt delivery of the offer in regards to the purchase of office furniture. I would also like to request the delivery and setup of the office furniture discussed in tender no. 2013/1234. Additionally, I would request that the delivery and setup be completed by November 30, 2013. Minor additional work and subsequent deliveries may, of course, be completed after this date.
- Closing: Thank you in advance for your assistance!
- Signature: Sincerely, Sandra Renz

The bottom status bar shows the file size as 18.8 KB and the current path: Repository // Documentation // Sample documents // [6] [Administrator] Letter - Renz Note.

If the *Tree only* option is selected, the repository or selected view is displayed as a tree structure on the left-hand side of the screen. The selected document or content of the selected folder is displayed in the viewer pane.

Tree and table

The screenshot shows the ELO Java Client interface with the 'Tree and table' view enabled. The left pane displays a tree structure of folders, and the right pane displays a table of documents within the selected folder. The document 'Letter - Renz Note' is selected, and its content is displayed in the viewer pane.

Repository

Repository	Typ	Short name
> 2017		
> Administration		
> Administrator		
> Customers		
> Department Manag		
> Department Market		
[-] Documentation		
[-] Scanned docum		
> [-] Barcode docum		
> [-] Manuals		
> [-] Document temp		
> [-] Sample docume		
> [-] Damage report -		
[-] Images		
> [-] Dynamic folders		
> [-] dynfolder		
> [-] ELO Scan Connecto		
> [-] ELOcv Base		
> [-] ELOj		
> [-] E-mail		
> [-] Employee profiles		
		ELO Digital Office C
		[Administrator] Let
		[Cole] List of materi
		ELO booth (jpg)
		Washington
		shuttle
		Sound file
		Company presentat
		Schulze and Boss 3
		Multipage order 2(T
		User Management
		Holiday Picture
		[Cole] Invoice 1001
		Project data
		[Administrator] Mee
		Invoice Contelo 20.
		Annual budget

Letter - Renz Note

E-mail Version 5 of Mar 21, 2018 Cole

Metadata form	Current version	Version date	Editor	Comment
E-mail	5	Mar 21, 2018, 2:16 AM	Cole	

Version control enabled

Date: Mar 21, 2018, 2:16 AM

[Sandra Renz](#)
[12 Seacrest Drive | 79999 Hamberg](#)

Altustrics Inc.
 600 Outremer St.
 River port, LA 19384

October 10, 2013

RE: Office furniture tender

To whom it may concern:

I wish to thank you greatly for the prompt delivery of the offer in regards to the purchase of office furniture. I would also like to request the delivery and setup of the office furniture discussed in tender no. 2013/1234. Additionally, I would request that the delivery and setup be completed by November 30, 2013. Minor additional work and subsequent deliveries may, of course, be completed after this date.


Thank you in advance for your assistance!


Repository Search Tasks

1 of 0 entries selected Repository // Documentation // Sample documents // Letter - Renz Note

If you enable the *Tree and table* option, you will only see folders in the tree structure. The content of the selected folder is displayed in a separate table on the right. The document selected in the table is shown in the viewer pane.

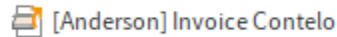
Reference

 EX10_2018-12-13_Invoice_Gruber

 invoice received

Entries (folders or documents) with an arrow icon are references. A reference is a link between a copy of an original document. The document only exists once physically in ELO. Clicking the function *Go to* (available in: *Ribbon > View*) takes you to the original entry.

Checked out document



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

Type	Short name	Date	Filed by	Version
	99 Sample ELO Script	Jun 3, 2020, 1:02 AM	Cole	1
	[Anderson] Invoice Contelo	Nov 25, 2013, 12:00 PM	Administrator	
	Offer-EX10_Zastry_2016-540	Jun 3, 2020, 12:48 AM	Cole	1
	Offer-EX10_Zastry_2016-540	Apr 12, 2016, 1:21 PM	Administrator	1
	Offer-EX10_Zastry_2019-445	Apr 12, 2016, 1:20 PM	Administrator	1
	Scan_20200511578504	Mar 5, 2018, 1:19 PM	Administrator	2

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 (1), or browse the folder by short name (2). You will find more information about the display options in the chapter *Toolbar*.
- Press the CTRL or SHIFT key and click the entries to select multiple entries. This is not possible in the tree.

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 an external program: *Ribbon > Document > Open in read-only mode* or *Ribbon > Document > Open with*. The file is not checked out.

- 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 images (formats: JPG, TIFF, PNG, etc.) and 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:



Decrease or increase font size: Decreases or increases the size of the displayed text.



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: Lines are wrapped automatically.



Search document: Search for a term in the full text. The matches are highlighted. Select the X icon to reset the search.



Show previous or next hit: Jumps to the previous or next highlighted entry in the text.

Information

Full text view in the search results: If you have selected a document in the search, the parts of the documents that match the search text are automatically highlighted in the full text preview. The search field is not displayed.

Use the arrow icons to display the next or previous match in the text.

Information

You can add the function *Show full text database content* to the *Favorites* tab and the context menus via: *Ribbon > User menu [your name] > Configuration > Quick access to functions*. This function allows you to see the full text information of a selected document. You can learn how to add the function in the *Customize the ribbon* chapter.

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.

Information

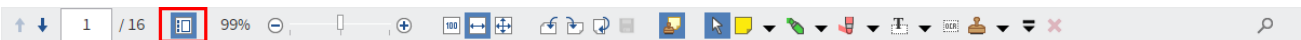
The *Switch PDF preview* function (available in: *Ribbon > View > Display*) enables you to switch to a different PDF preview mode. There are different modes for viewing PDFs. One mode includes the ELO viewer toolbar, which allows you to place annotations on the document. The other mode includes typical PDF functions and may be more suitable for viewing specific documents.



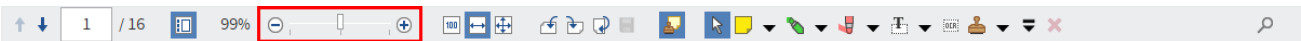
Next or previous page: The next or previous page of a multi-page document is displayed.

Information

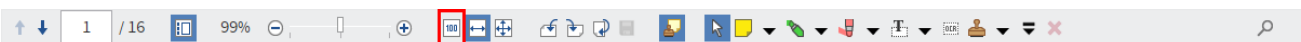
You can change the order of pages in a TIFF document with multiple pages. You will find more information here: *Move pages*.



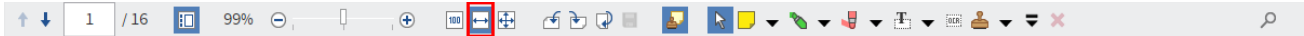
Show thumbnails of pages: If you select this option, the pages of documents with multiple pages are displayed as thumbnails. Click on a thumbnail to go to the page.



Zoom in or zoom out: Increases or decreases the size of the image shown.



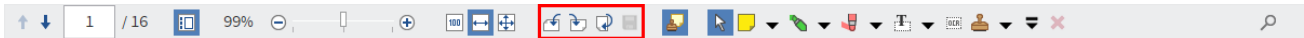
Zoom to 100%: The image is displayed in the original size.



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



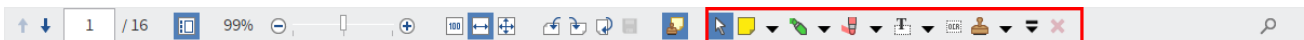
Fit image size to the frame: The image is adjusted to the height of the viewer pane so that the entire page of the document is displayed.



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. For detailed information on how to apply annotations, see the chapter Add annotations.



Text selection with OCR: This function allows you to select multiple words or lines of text that you can transfer to a field in the *Metadata* dialog box. For more information, refer to the Metadata > Enter metadata with ELO Click OCR chapter.



Search document: Search the contents of a 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.

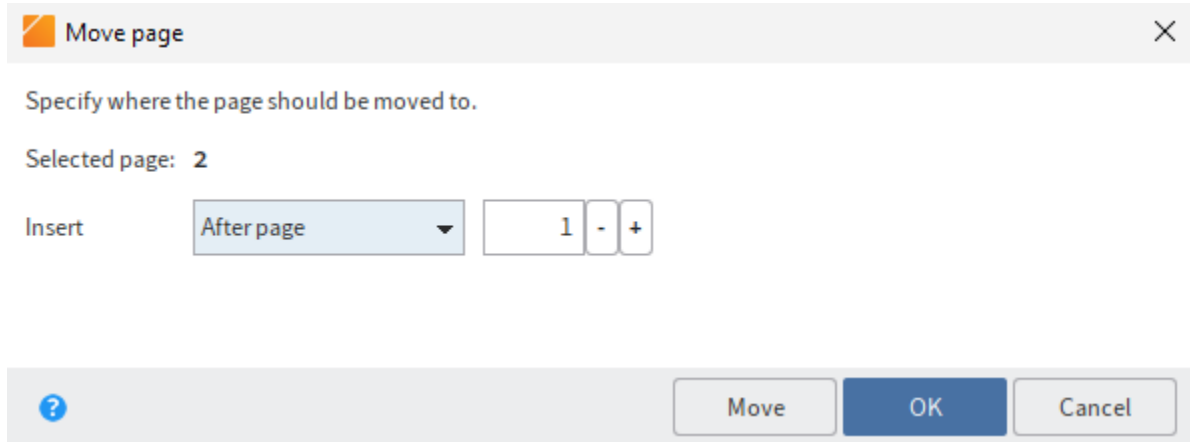
Move pages

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

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. Choose from the following options:
 - After page or Before page: Use the spin box to specify after or before which page you want to insert the selected page.
 - As first page or As last page: The selected page is moved to the beginning or end of the document.
 - Move: To move the selected page without closing the dialog box, select *Move*.
5. Select *OK* to move the selected page and close the dialog box.

Business object

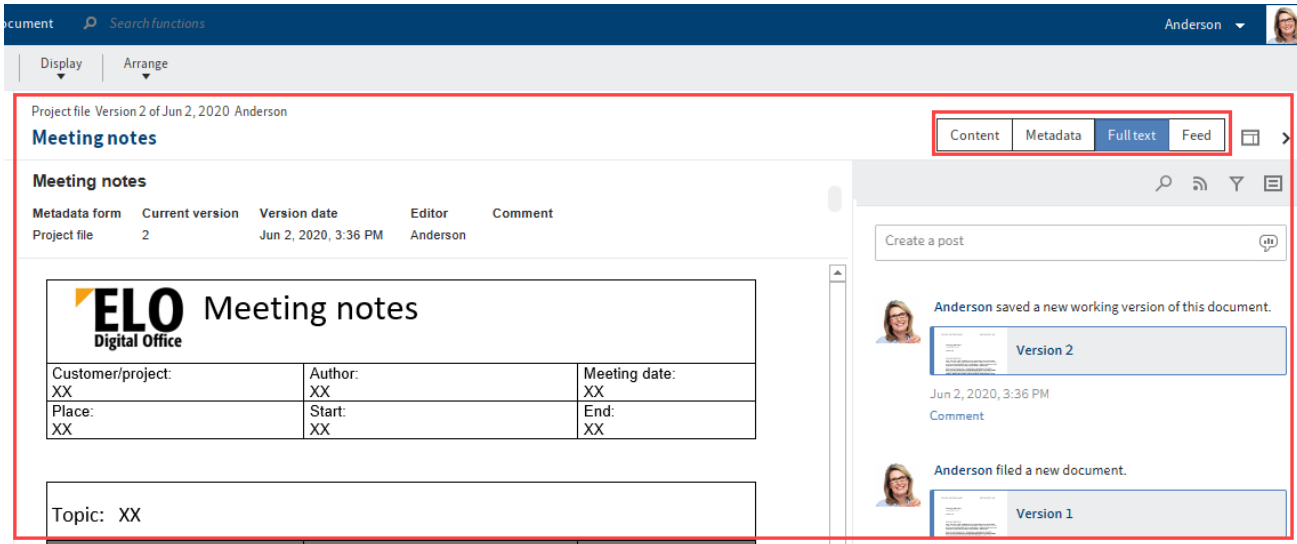
A business object is a special type of folder that helps organize contents into regions. A region is an area encompassing all entries within a business object. This enables you to find related entries faster, e.g. all documents related to a file.

The same options are available in a business object as in a folder.

The Search a business object section explains how to search a business object.

Viewer pane

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



Each entry is made up of different elements. Use the tabs to switch between the elements. The most important elements are:

- Content: If you have selected a folder, you will see the child folders and documents within it. If you have selected a document, the document will be displayed, if this is possible.
- Metadata/Form: Displays either the metadata or the form associated with the entry.

Information

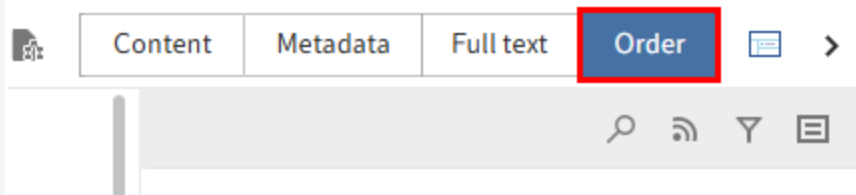
If the entry was stored with a gen. 2 metadata form, you can edit the entry directly in the viewer pane.

Depending on the configuration, some parts of the form may appear collapsed. To expand a part of the form, click the arrow to the left of the header.

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

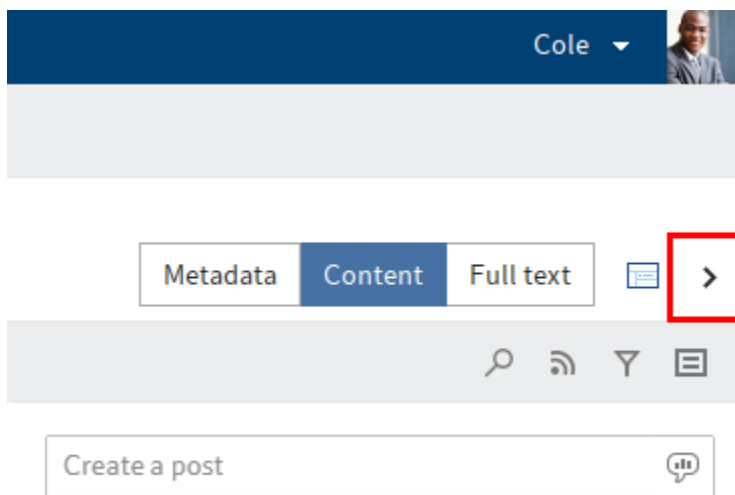
Information

An additional tab with the name of the metadata form linked to the business object appears in the viewer pane for entries within a business object. You can view and edit metadata for the parent business object here.



Maximize/minimize viewer pane

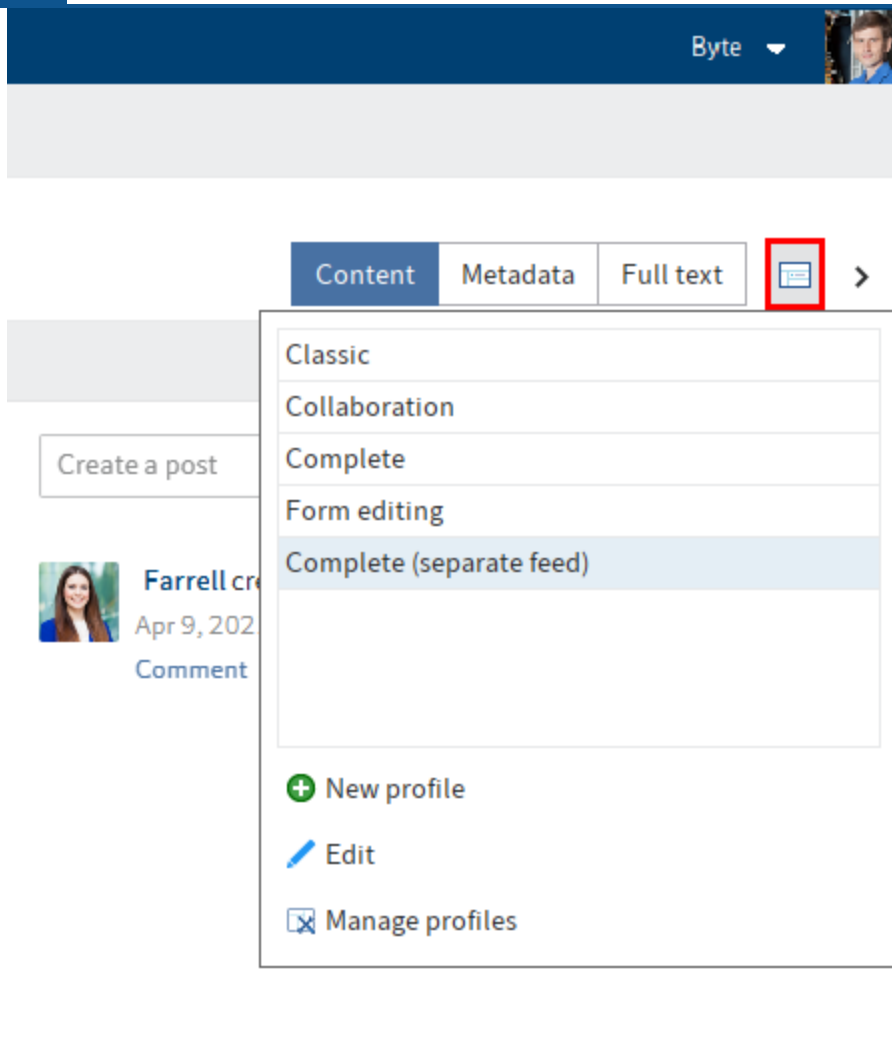
This function minimizes or maximizes the viewer pane.



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

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.



Create view profile

1. Select the *Select and configure view profiles*.

A drop-down menu appears.

2. Select *New profile*.

The client switches to the mode for creating a new view profile.

In the viewer pane, you see the view elements and four panes which you can assign view elements to. The following elements are available:

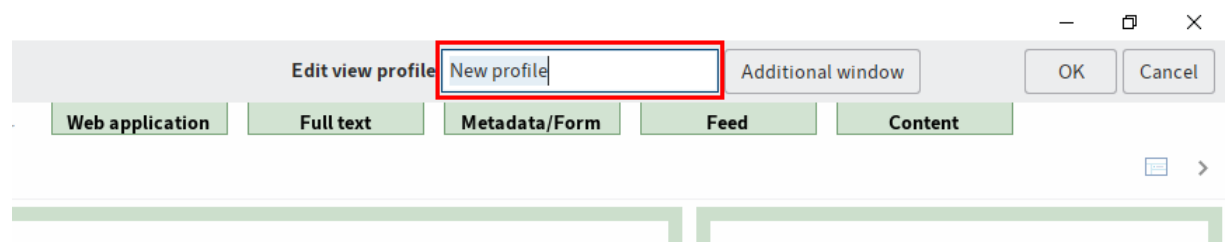
- We application
 - Full text
 - Metadata/Form
 - Feed
 - Content
3. Drag a view element to any pane and release the mouse button.

The view element is assigned to the pane.

Information

Try out the different viewing options. The size of the panes is adjusted automatically.

Optional: You can also assign multiple view elements to a subpane. In this case, the individual view elements are displayed as tabs. You can change the order of the tabs.



4. Enter the name of the view profile in the *Edit view profile* field.

Optional: Select the *Additional window* button to open the *Viewer pane* dialog box. In this dialog box, you can see what the view elements would look like. To do so, drag the desired view element onto the *Preview* dialog box.

Please note

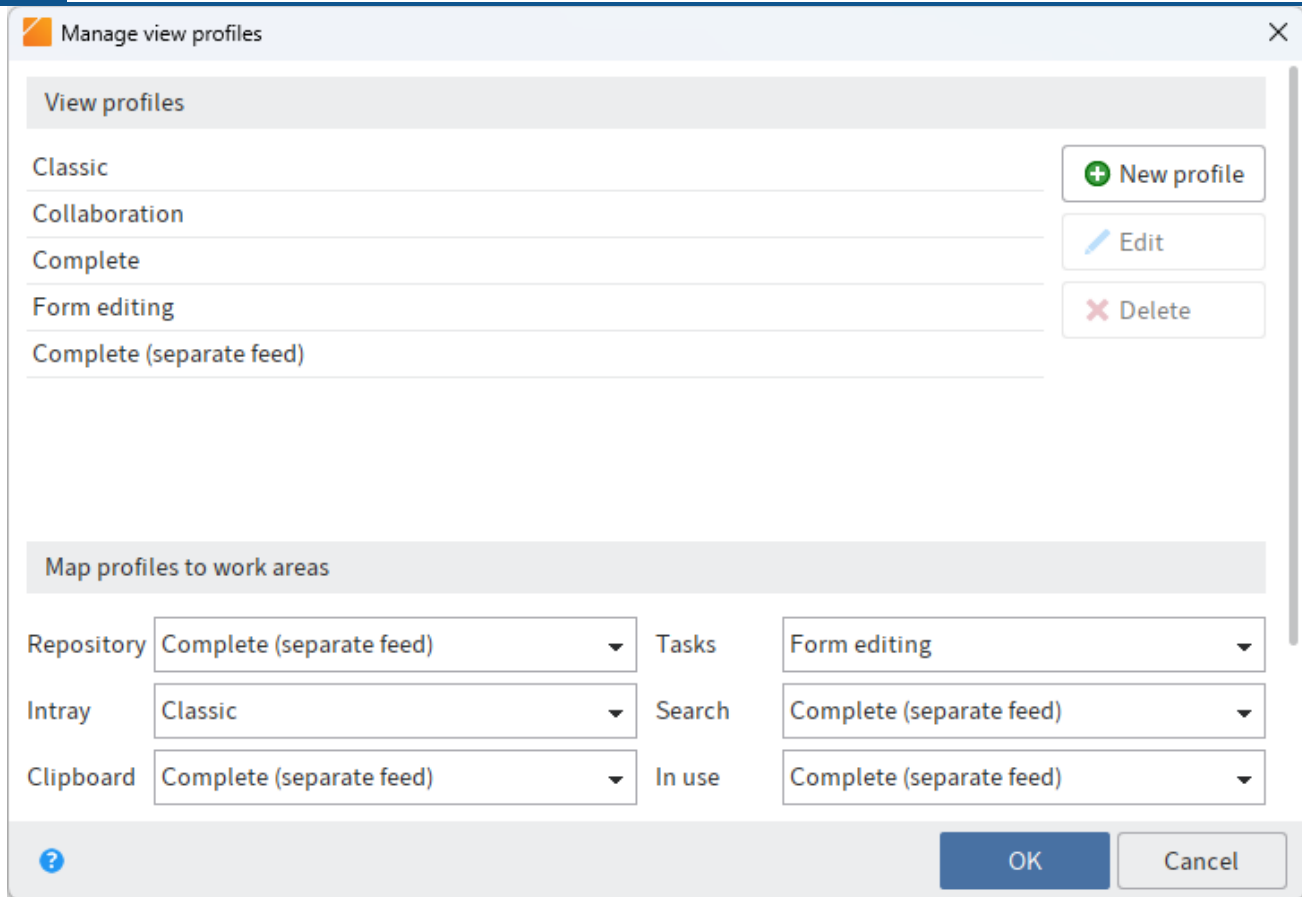
The settings you make in the *Preview* dialog box are not applied to the view profile.

5. Select *OK* to save the view profile.

The new view profile is created.

Manage view profiles

The *Manage profiles* function enables you to edit and delete existing view profiles, and assign them to individual work areas. You can access the function via *Select and configure view profiles > Manage profiles*.



The *Manage view profiles* dialog box opens.

The settings for managing the existing view profiles are in the top part of the dialog box.

New profile: This opens a dialog box for creating a new profile. Arrange the viewer panes by dragging the rectangular preview modes (full text, form, content, feed, web application).

Edit: Open a selected view profile for editing in the *View profiles* list.

Delete: Select *Delete* to remove the selected view profile. The view profile is initially marked red. The view profile is deleted once you select *OK*, closing the dialog box. If you close the dialog box with the *Cancel* button, the delete action is reversed.

Map profiles to work areas

You can map a view profile to a work area. Select a view profile for each work area in the drop-down menus.

Map profiles to metadata forms

You can map a view profile to a metadata form. Select a metadata form in the drop-down menu on the left and map it to a view profile in the drop-down menu on the right.

New: Select *New* to add a new metadata form.

Delete: Select *Delete* (X icon) to remove the metadata form.

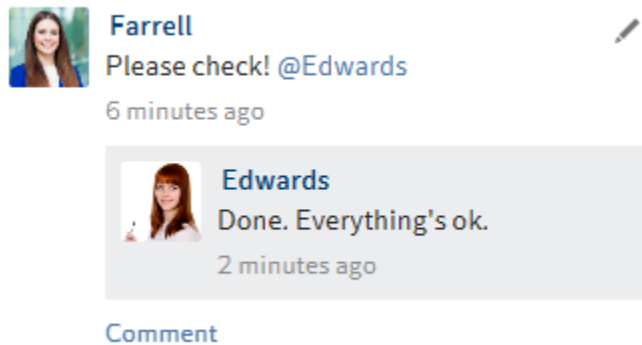
Metadata

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. Unless you have a different configuration, the dialog box appears automatically when you file a document or create a folder.

For detailed information, refer to the Edit metadata chapter.

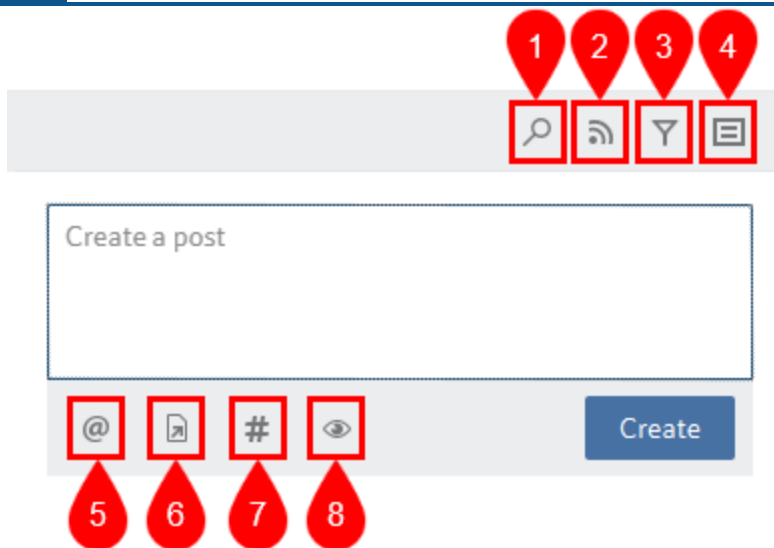
Feed



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 indicated by a green dot.

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 Search feed

2 Subscribe to feed: When you subscribe to a feed for an entry, any new posts in the feed are also shown in *My ELO*. Users automatically subscribe to a feed when they file a document, or create a folder, new document version, feed post, or comment. You can change the settings for subscriptions in the configuration or via the settings in *My ELO*.

3 Show filter options: Filters work in the same way as *My ELO > News*.

4 Show metadata for 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.

5 Mention users or groups: Alternatively, enter @ in the feed post to insert a mention. The users mentioned can see the corresponding feed post in *My ELO*.

6 Reference entry: 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. To be notified of new posts related to a specific topic, you can subscribe to hashtags. Select a hashtag and then select *Subscribe* (antenna icon).

8 Visibility: You can use this to restrict who can read your post. With *Remember selected visibility*, you can save the visibility settings as the default for future feed posts. The visibility settings of the post you are commenting on apply for comments. They cannot be changed.

Create post/comment

The feed enables you to write posts related to entries in ELO and comment on posts uploaded by other users. Select *Create* or CTRL+ENTER to upload the post.

You can bold text in posts, polls, and comments. Place an asterisk (*) at the beginning and end of the 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.

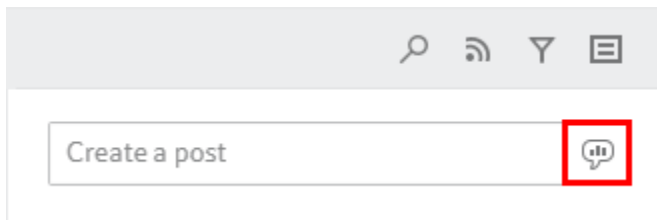
Please note

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.

Edit post

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

Edited entries are marked as *edited* below the entry. Select *edited* to open the editing history.

Create poll

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

You can select a duration for the poll from the drop-down menu and 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

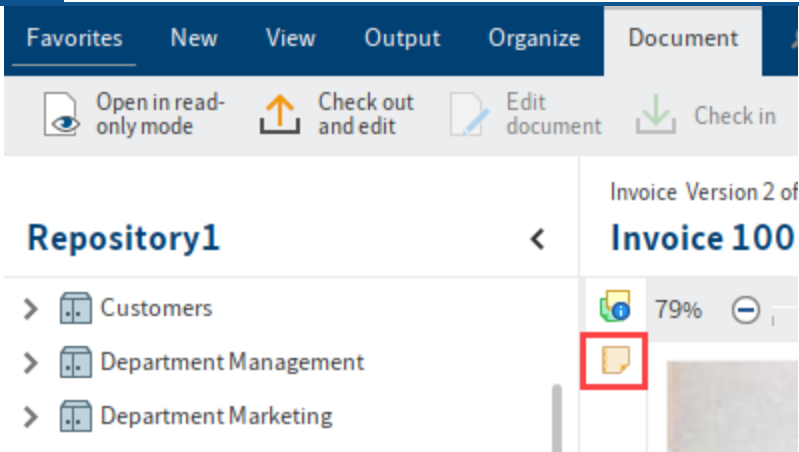
Select *Create* to start the poll.

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.

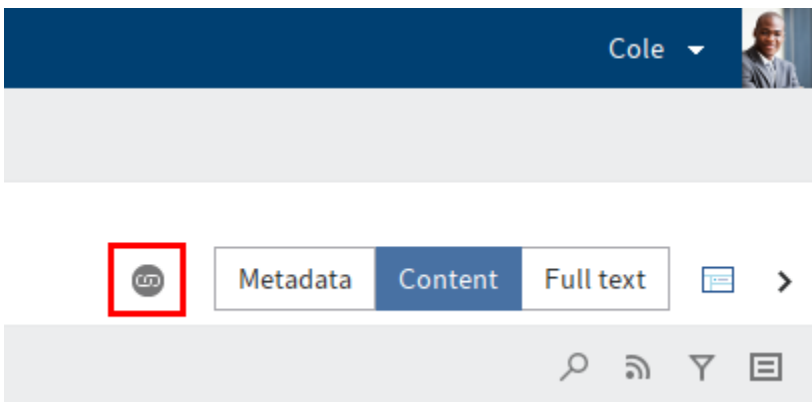
Margin notes, links, attachments

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



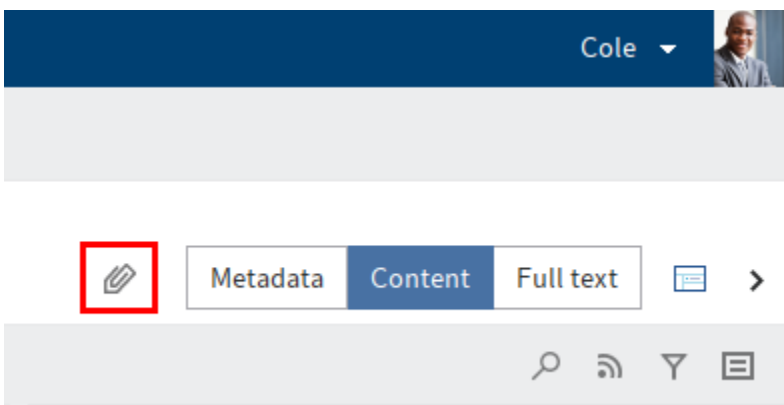
Margin notes: You will see margin notes for an entry on the split bar. Select the icon to open the margin note.

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



Links: The chain icon represents a link. With this 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 chapter Link.



Attachment: The paper clip icon represents an attachment that was filed along with the selected document. You can open the attachment with this icon.

You can learn how to create an attachment in the chapter Add attachment.

Save as

Keyboard shortcut: CTRL + S

Use this function to store the currently selected document outside of ELO.

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.

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.

You can be substituted for by other users or by groups.

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

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.

In the *Users with substitution rights* list, you see the users and groups that are designated as substitutes. Active substitutes are marked green. Incomplete substitutions are marked yellow. To complete a substitution, at least one of the options *Active substitution in this period* and *May activate/deactivate outside a scheduled period* must be enabled AND one of the options *Substitute inherits everything* or *Restrict substitution*. At least one of the boxes below the option *Restrict substitution* must be selected.

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 disable 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

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

Information

Periods are not deleted automatically; you have to delete them by selecting the X icon.

Substitution rights: If you enable the *May activate/deactivate outside a scheduled period* option, the substitute is allowed to activate or deactivate the substitution. This gives them permission to substitute for you in general without you defining a substitution period.

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

Select one of the following options:

- Substitute inherits everything
- Restrict substitution

Important

If you enable the option *Substitute inherits everything*, your substitute will have access to all documents, tasks, and functions that you have access to. This includes your personal documents, tasks, and notes that otherwise only you can see.

Substitute inherits everything: The substitute is assigned all your rights. The substitute will have access to:

- Documents in ELO (including personal ones)
- Files in your Intraday
- Your personal tasks and workflows
- Group memberships and group tasks
- Notes (including personal ones)
- Client functions

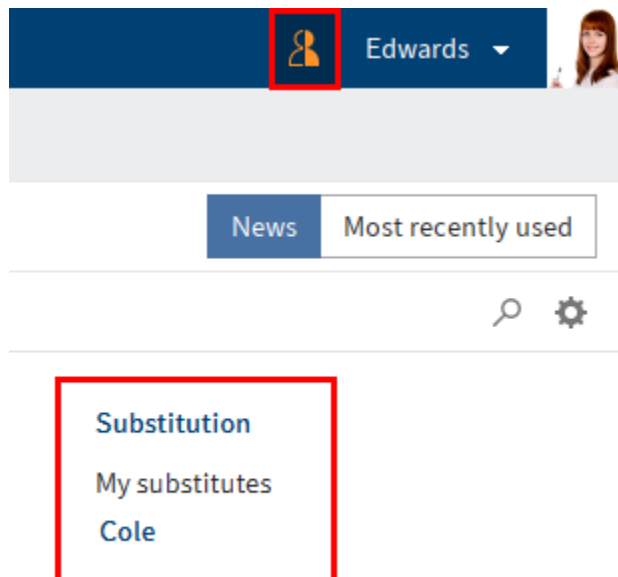
Restrict substitution: You can individually configure how many rights you want to give your substitutes. You must enable at least one of the following three options:

- Personal tasks and workflows: If you enable this option, your substitute can access tasks and workflows that you have been assigned personally, not those given to you as a member of a group. The substitute requires the *Extend workflow rights* user right in order to be able to view the documents associated with a task. This user right can only be granted by an administrator.
- Intray access: If you enable this option, your substitute has access to your Intray.

Please note

To allow your substitute access to documents in your Intray, the 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 out*. If necessary, contact your system administrator.

- Inherit group membership: Use the drop-down menu to select which of your groups the substitution applies to. Your 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. Only the groups that allow substitution are available for selection.



If you are currently being substituted for, you will recognize this based on 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.

Forward substitutions

Substitutions are not forwarded automatically.

This means: Cole has appointed Anderson as his substitute. In turn, Anderson appoints a different user as her substitute. This user does not receive the tasks, rights, etc. that Anderson is given as substitute for Cole.

May forward substitution: By enabling this option, you allow 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.

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

Accept substitution

This function (available in: *Ribbon > User menu [your name]*) enables you to accept a substitution request from another user. You can view the substitution tasks in your *Tasks* work area by selecting *Task > Display > Substitution tasks*.

The following options are available for accepting substitution:

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

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.

I have the right to substitute for

On the left-hand side, 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. The *Add employee* field is only displayed if you have been assigned the role of supervisor.

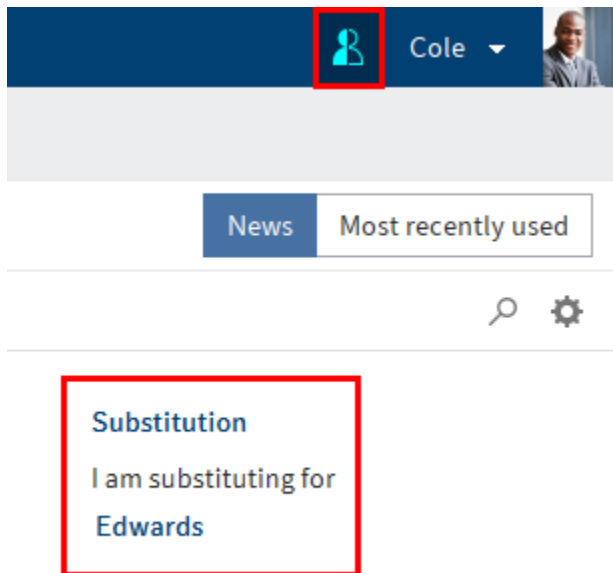
You will recognize active substitutions by a green bar next to the profile picture.

If you select a user, their exact substitute permissions are shown on the right-hand pane. This area is for information purposes only and cannot be edited.

Edit substitutions

You have the following options:

- **Activate/Deactivate:** These buttons allow you to activate substitutions that are currently inactive or deactivate active substitutions you want to end. 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:** With this button, you can 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 tab > Display*.

Result

The substitution tasks are shown in your task list.

Information

You can tell whether the *Substitution tasks* function is enabled by the border around the button.

View substituted user's Intray

Available in: *Intray > 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 out*. If necessary, contact your system administrator.

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

- **Intray files of:** In this area, you can see whose Intray files you are currently viewing.
- **Select user:** Use this button to select the user whose Intray you want to access.
- **Open in read-only mode:** Opens the selected document 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.