



ELO Java Client

Collaboration



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Collaboration

Workspaces

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.

Workspaces are based on workspace types. These are created by administrators and define which views and filters are available to you. They also define which objects can be created in a workspace.

You can find more information about workspace types in the [ELO Workspaces](#) documentation.

Objects

An object (business object) is a special type of folder that helps organize contents into regions. You can find more information in the following sections:

- Important components > Business object
- Table
- Kanban board

Connections between objects are not established via a hierarchical structure, but by relations.

The Create object section explains how to create an object.

Relations

You can establish a connection between objects, for example between a job application and the position it was submitted for.



You establish these connections using relation fields. Relation fields can be found in the metadata form of an object.

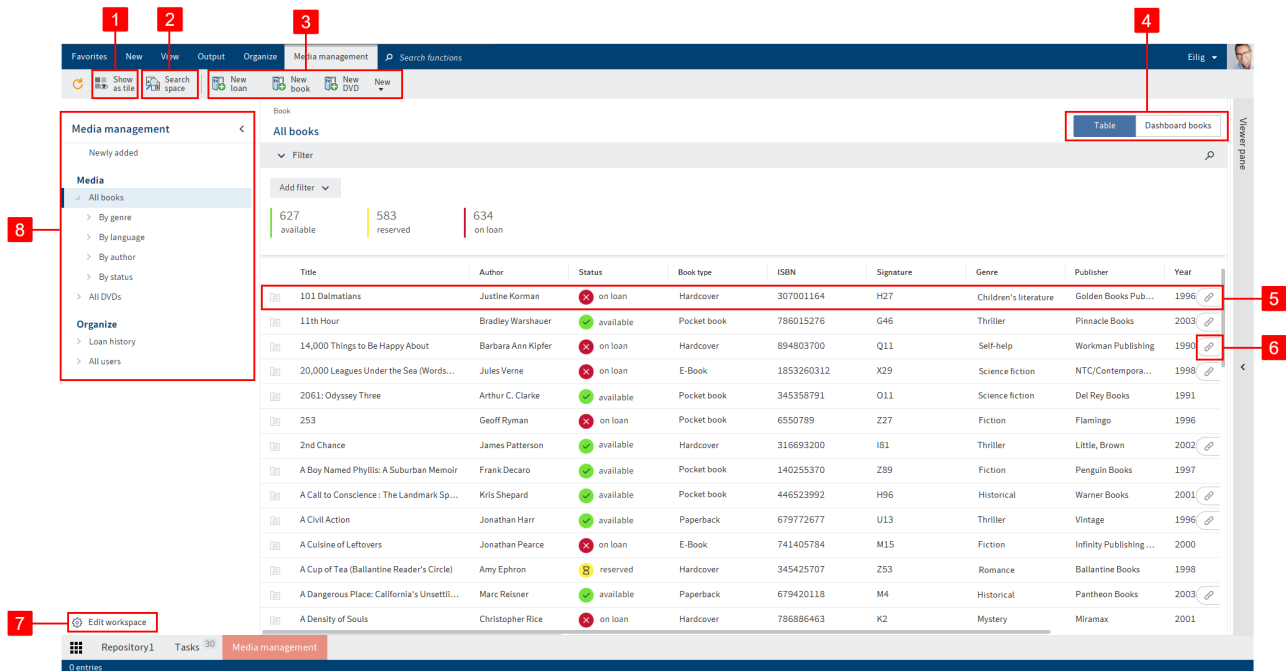
In the table view, a relation is indicated by a flyout (button with a chain icon).

If you've entered the corresponding position in the relation field of a job application, for example, the flyout takes you from the position to the application. This gives you an overview of all applications for a position.

The link button (chain icon) opens a quick view of the linked entry. Select the Go to button to switch to the corresponding entry.

Workspace home screen

Refer to the Spaces section to learn how to access a workspace.



You can access all the elements of the workspace via the home screen of a workspace. The ribbon features a tab with additional workspace functions.

You have the following options:

- 1 Show as tile: You can create a tile in *My ELO* that provides quick access to the workspace.
- 2 Search space: You can search the entries of the selected space. Refer to the chapter on Filters for a more detailed description of the search.
- 3 Create new object: You can create an object. For more information, refer to the Create object and Objects sections.
- 4 Switch view: If multiple views have been created for a workspace, you can use the tabs to switch between views. There are tables, kanban boards, dashboards, and calendar tabs. The tabs are named and visibility is set by the administrator. These settings are customizable.
- 5 Show entry
- 6 Select relation: You can open entries that are related to the selected entry.
- 7 Edit workspace: You can edit the workspace if you are authorized to do so based on your role.
- 8 Workspace filter tree: You can switch between the workspace filters. Filters can be single or multi-tier.

Edit workspace

The screenshot displays the 'Edit workspace' configuration page in the ELO Java Client. The top navigation bar includes tabs for 'Favorites', 'New', 'View', 'Output', 'Organize', and 'Media management'. The 'Media management' tab is active. Below the navigation bar, the 'Workspace' section is visible, containing a 'Media management' sub-section. The 'Overview' section includes input fields for 'Workspace name' (set to 'Media management') and 'Type name' (set to 'Media management'). The 'Roles' section features a 'New role' button and a list of roles: 'ADMINISTRATOR' (with permissions: Edit workspace, Create new objects, Edit roles, Delete workspace) and 'Member' (with permission: Create new objects). A 'Default for new members' dropdown is set to 'Member'. At the bottom, the 'Workspace member' section includes an 'Add user/group' button.

You can edit the workspace here. The [ELO Workspaces](#) and [ELO packages > Solutions](#) documentation provides more information on the following spaces:

- Basic settings
- Metadata forms
- Views
- Filter trees
- Parameters
- Decision rules

Please note

When you edit the settings in one area, it is no longer linked to the corresponding area of the workspace type. Changes to the workspace type are therefore no longer automatically applied to this area in the workspace.

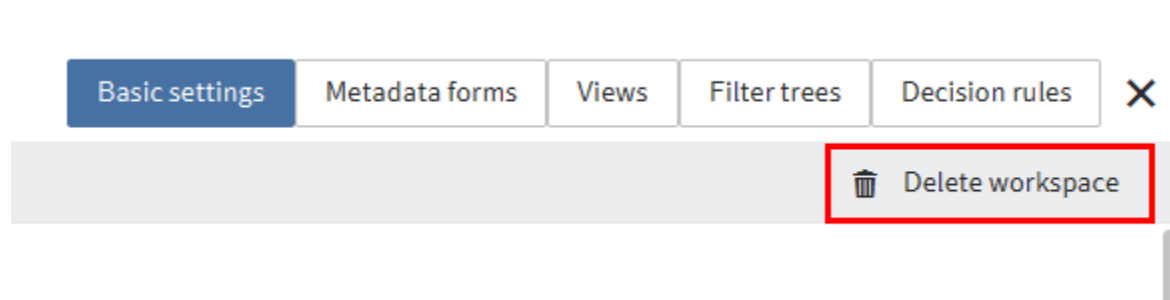
The *Roles* area can only be edited after the workspace has been created.

The following options are only available in the workspace:

▼ Workspace members

Add user/group			
User/group ▲	Assigned roles	Roles inherited from groups	
 Jupiter	Administrator	▼	Member
 Byte	Member	▼	×
 Customer Service	Guest	▼	×
 Cole	Administrator	▼	×

You can add members to the workspace and set roles for them.



You can delete the workspace.

'Workspace members' area

You have the following options:

You can add members and groups to the workspace. If you add groups, all members of the group are granted the role set for the group.

Please

New members need to restart ELO to access the space.

When you add workspace members and groups, a feed post is automatically created and is displayed in *My ELO*.

Administrator

Select at least on role

☒ Administrator

☐ Member

You can change the role of workspace members with the drop-down menu. Workspace members can have multiple roles. If workspace members belong to a group that has been added to the workspace, they are also granted the roles that the group has in the workspace.



You can delete workspace members. Administrators can only be deleted by administrators. The last administrator cannot be deleted.

Search and filter

You can search and filter entries in workspace views.

Book

All books

Table Book dashboard

Filter

new

Add filter

18 Available 5 Reserved 9 On loan

Title	Author	Status	Book type	ISBN	Signature	Genre	Publisher	Year	Language
Moonheart (Newford)	Charles de Lint	Available	Hardcover	312890044	D11	Fantasy	Orb Books	1994	English
Sappho: A New Translation	Mary Barnard	Available	Paperback	520011171	D51	Historical	University of Calif...	1958	Italian
Lake News	Barbara Delinsky	Available	E-Book	067103619X	E29	Romance	Pocket	2000	German
The New Shoe	Arthur William U...	Available	Paperback	684180200	E31	Mystery	Scribner Paper Fic...	1983	Italian
Vittorio, The Vampire: New...	Anne Rice	Available	Pocket book	345422392	N30	Horror	Ballantine Books	2001	Spanish

You can open the search function by clicking on the magnifying glass icon in the toolbar. Enter a search term and press the ENTER key to start your search. Search hits are highlighted in yellow.

If you switch to another view, the search hits will also be displayed there until you cancel the search.

Book

Science fiction

 Filter Activated Reset filter
Language: English, German ✕Book type: Hardcover ✕Add filter ✕
 37
Available

 38
Reserved

 28
On loan

Title	Author	Status	Book type	ISBN
 20,000 Leagues U...	Jules Verne	 On loan	Hardcover	1853260312
 Jurassic Park	Michael Crichton	 Available	Hardcover	345370775

You can set quick filters to filter entries.

Book

All books

 Filter Activated Reset filter
Add filter ✕
 625
Available

 583
Reserved

 634
On loan

Title	Author	Status	Book type
 11th Hour	Bradley Warshauer	 Available	Pocket book
 2061: Odyssey Th...	Arthur C. Clarke	 Available	Pocket book

Status filters show the number of entries for each status, giving you a quick overview of your data. You can enable one or multiple status filters.

Status filters are created by the administrator.

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

Table

Title	Author	Status	Book type	ISBN	Signature	Genre	Publisher	Year
101 Dalmatians	Justine Korman	on loan	Hardcover	307001164	H27	Children's literature	Golden Books Pub...	1996
11th Hour	Bradley Warshawer	available	Pocket book	786015276	G46	Thriller	Pinnacle Books	2003
14,000 Things to Be Happy About	Barbara Ann Kipfer	on loan	Hardcover	894803700	Q11	Self-help	Workman Publishing	1990
20,000 Leagues Under the Sea (Words...	Jules Verne	on loan	E-Book	1853260312	X29	Science fiction	NTC/Contempora...	1998
2061: Odyssey Three	Arthur C. Clarke	available	Pocket book	345358791	O11	Science fiction	Del Rey Books	1991
253	Geoff Ryman	on loan	Pocket book	6550789	Z27	Fiction	Flamingo	1996
2nd Chance	James Patterson	available	Hardcover	316693200	I81	Thriller	Little, Brown	2002
A Boy Named Phyllis: A Suburban Memoir	Frank Decaro	available	Pocket book	140255370	Z89	Fiction	Penguin Books	1997
A Call to Conscience: The Landmark Sp...	Kris Shepard	available	Pocket book	446523992	H96	Historical	Warner Books	2001
A Civil Action	Jonathan Harr	available	Paperback	679772677	U13	Thriller	Vintage	1996
A Cuisine of Leftovers	Jonathan Pearce	on loan	E-Book	741405784	M15	Fiction	Infinity Publishing ...	2000
A Cup of Tea (Ballantine Reader's Circle)	Amy Ephron	reserved	Hardcover	345425707	Z53	Romance	Ballantine Books	1998
A Dangerous Place: California's Unsettli...	Marc Reisner	available	Paperback	679420118	M4	Historical	Pantheon Books	2003
A Density of Souls	Christopher Rice	on loan	Hardcover	786886463	K2	Mystery	Miramax	2001

In a table, you see all the entries that match the selected filters. The selection of filters is based on the workspace type.

You have the following options:

Book

All books

Filter

Add filter

627 Available 583 Reserved 634 On loan

Title	Author	Status
A Dangerous Place: Calif...	Marc Reisner	Available
A Density of Souls	Christopher Rice	On loan
A Feather on the Breath ...	Sigrid Nunez	Available
A First Book of Shapes (...)	A. J. Wood	Available
A Fountain Filled With B...	Julia Spencer-Fle...	On loan
A Judgement in Stone	Ruth Rendell	On loan

Book

A Density of Souls

Content Metadata Full text Feed

Media classification

Title *

A Density of Souls

Year

2001

Genre

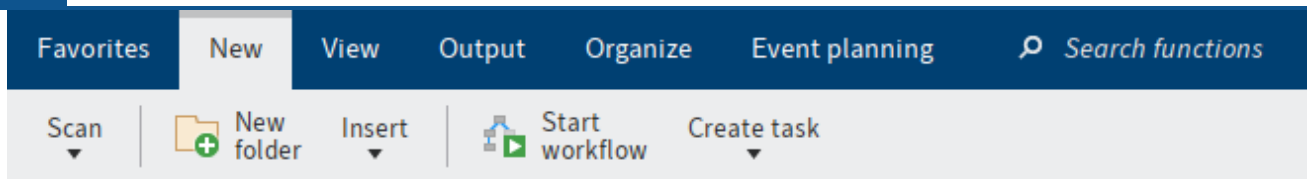
Mystery

Language

English

Keywords

You can open the entries. The entry is shown and you can edit it in the *Metadata* tab. You can insert documents and folders for an entry and open them on the *Content* tab. This area works like the viewer pane in the repository.



You can edit the entries using the functions on the ribbon. You can also use the context menu for documents and folders associated with an entry.

	Title ▲	Author	Status
	101 Dalmatians	Justine Korman	On loan
	11th Hour	Bradley Warshauer	Available
	14,000 Things to Be ...	Barbara Ann Kipfer	On loan

You can sort the filtered entries in the table by clicking on the column header.

Book

All books

Table ▼

Filter

Add filter ▼

627 available

583 reserved

634 on loan

Title	Author	Status
A Dangerous Place: Califor...	Marc Reisner	
A Density of Souls	Christopher Ric...	On loan
A Feather on the Breath of ...	Sigrid nunez	veni
A First Book of Shapes (Pre...	A. J. Wood	
A Fountain Filled With Blo...	Julia Spencer-Fl...	

Book

< A Density of Souls

Media classification

Title*

A Density of Souls

Year

2001

Genre

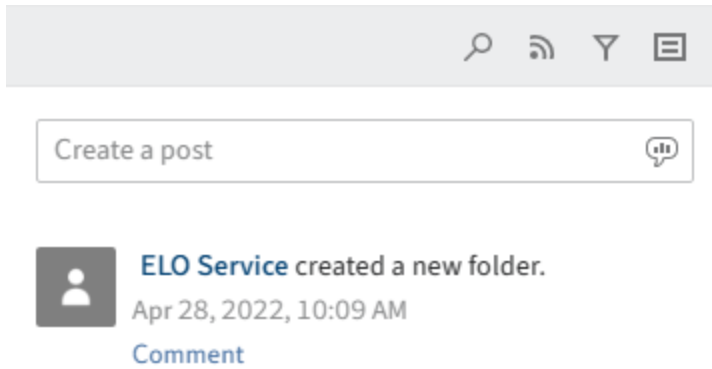
☐ Mystery

Language

☐ English

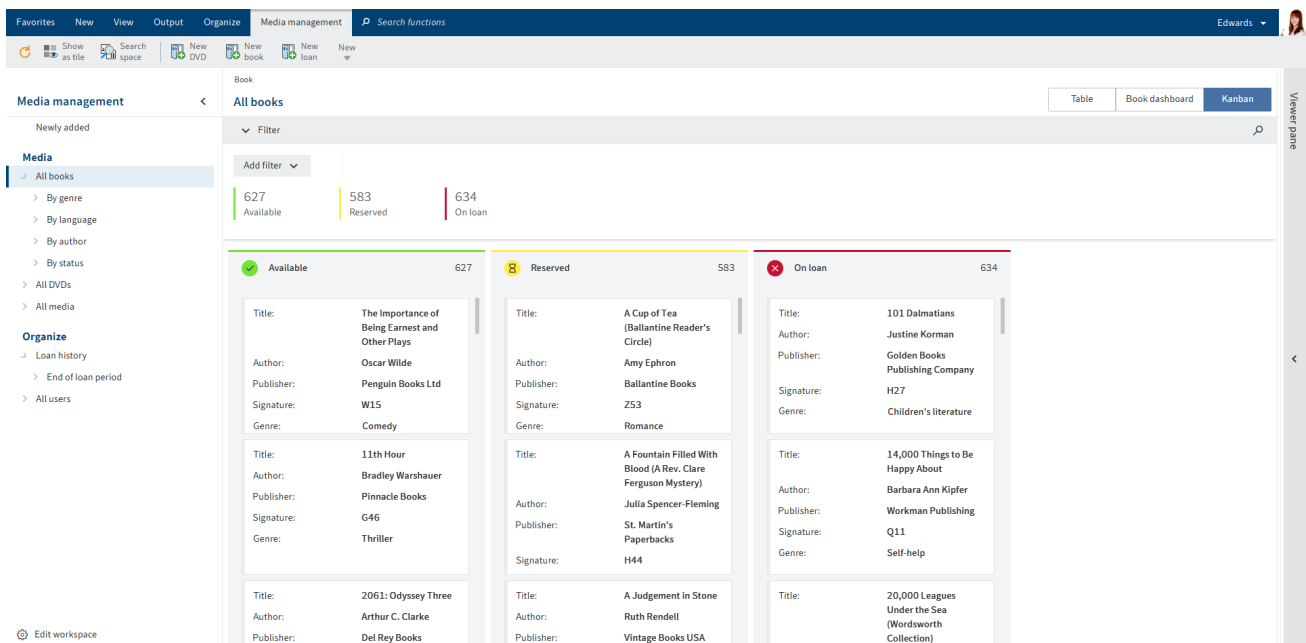
Keywords

You can use flyouts to open entries that are related to the selected entry. The metadata of the entry has to contain a relation field that establishes the link. If multiple relations exist for an entry, you can open one of the associated entries using the drop-down menu in the flyout.



You can enter a feed post. The feed works as described in the chapter Feed.

Kanban board



In a kanban board, entries are assigned to columns depending on the value of a specific status field.

You have the following options:

Book

Science fiction

Kanban

> Filter

✓ Available

8

Title: Jurassic Park

Author: Michael Crichton

Publisher: Ballantine Books

Signature: Q29

Genre: Science fiction

Title: Stranger in a Strange Land

Author: Robert A. Heinlein

Publisher: Berkley Publishing Group

Signature: Q22

Book

< Jurassic Park

Content

Metadata

Full text

Feed

Media classification

Title *

Jurassic Park

Year

1999

Genre

☐ Science fiction

Language

☐ German

Keywords

Book data

Author

You can open the entries. The entry is shown and you can edit it in the *Metadata* tab. You can insert documents and folders for an entry and open them on the *Content* tab. This area works like the viewer pane in the repository.

Favorites

New

View

Output

Organize

Event planning

Search functions

Scan

New folder

Insert

Start workflow

Create task

You can edit the entries using the functions on the ribbon. You can also use the context menu for documents and folders associated with an entry.

Book

Science fiction

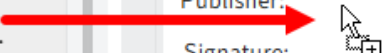
> Filter

 Available 8

Title:	Greatest Hits (Herald Classics)
Author:	Harlan Ellison
Publisher:	Union Square & Co.
Signature:	E24
Genre:	Science fiction

 Reserved 9

Title:	Dune
Author:	Frank Herbert
Publisher:	Ace
Signature:	H43
Genre:	Science fiction



You can move entries via drag-and-drop. The corresponding value in the metadata changes.







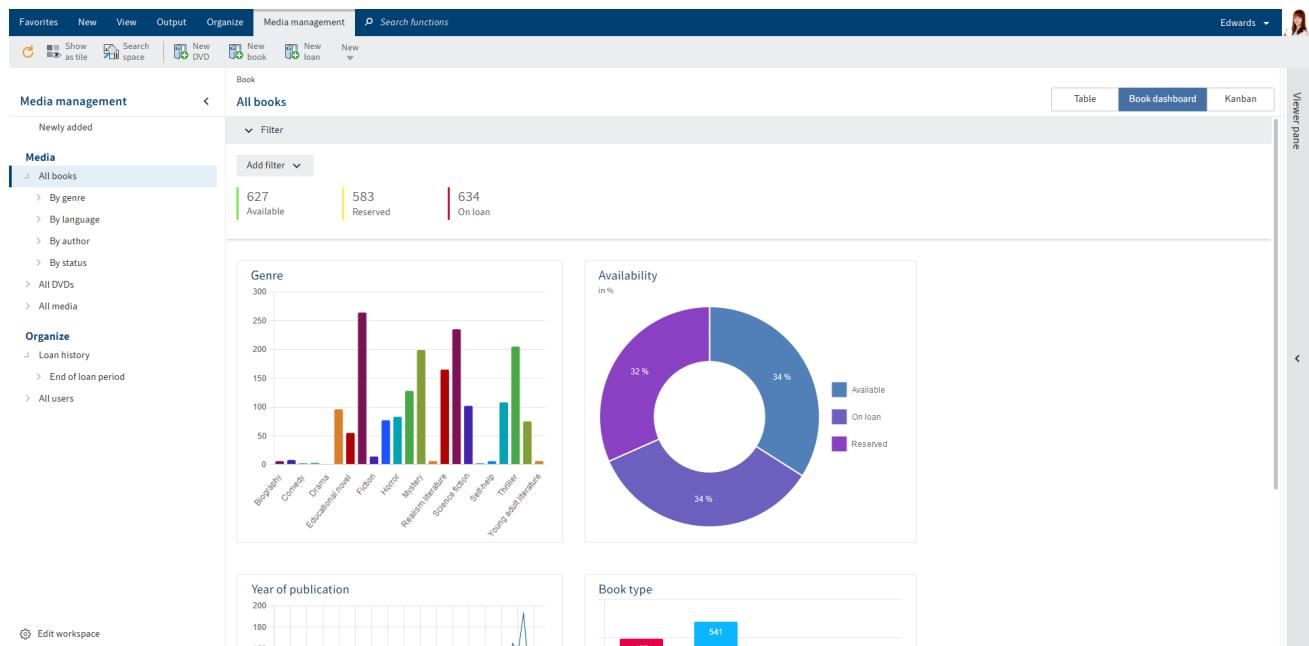
ELO Service created a new folder.

Apr 28, 2022, 10:09 AM

[Comment](#)

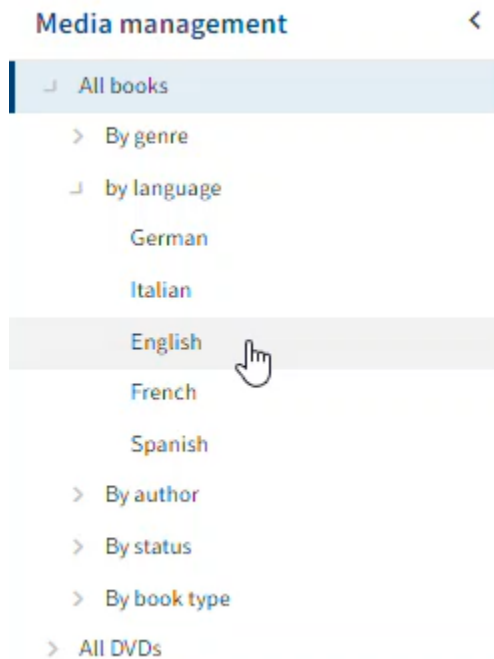
You can enter a feed post. The feed works as described in the chapter Feed.

Dashboard

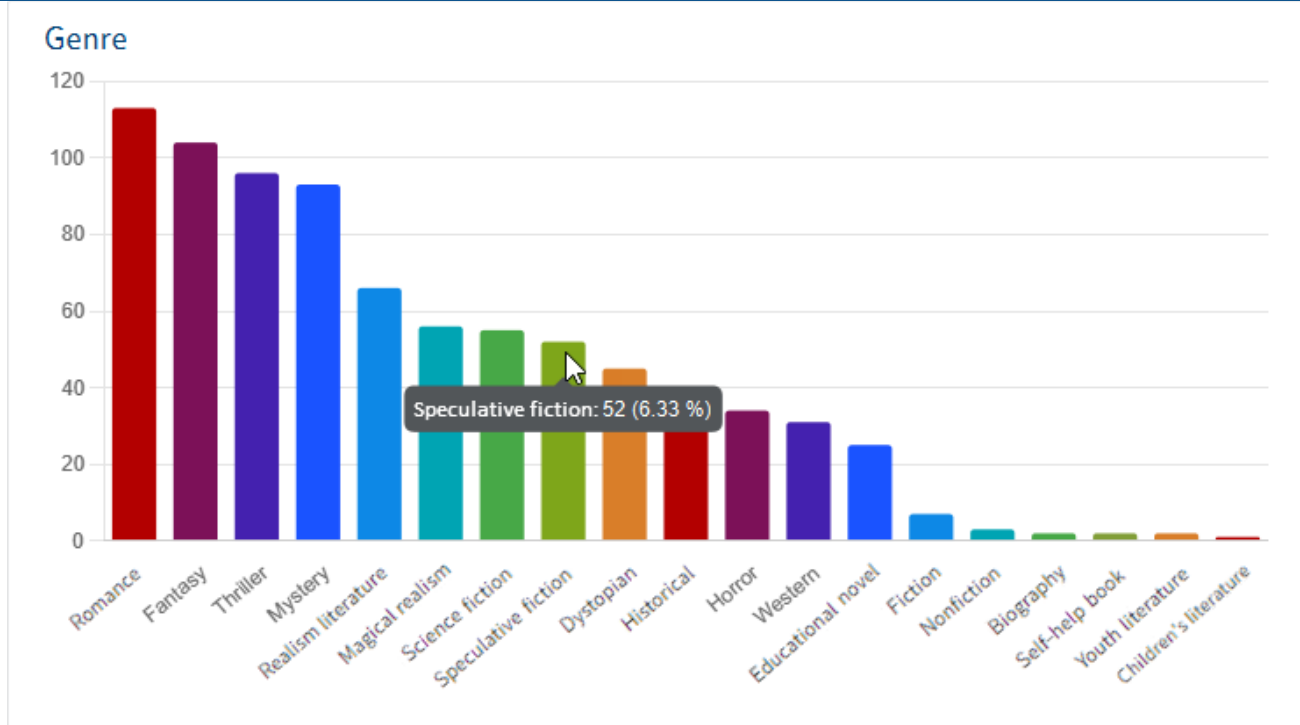


Workspace entries can be visualized in various ways in a dashboard. The types of visualization available depend on the administrative settings.

You have the following options:

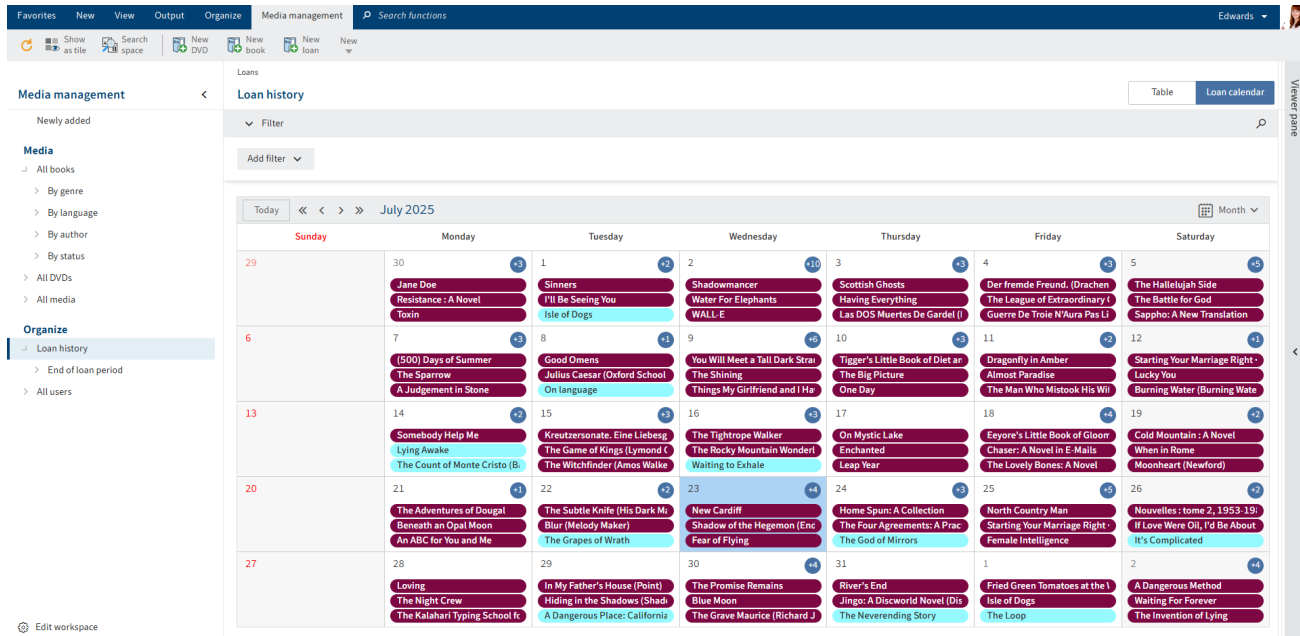


You can filter the dashboards.



Move the cursor over the charts on the dashboard to view details.

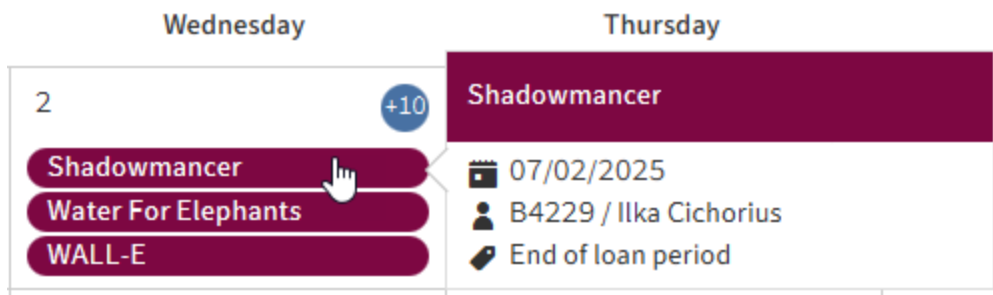
Calendar



In a calendar, entries are shown organized by date. Multiple entry categories can be shown.

You can switch between the different calendar views using the drop-down menu.

You can open the entries. The entry is shown and you can edit it in the *Metadata* tab. You can insert documents and folders for an entry and open them on the *Content* tab. This area works like the viewer pane in the repository.



You can display details about a calendar entry by hovering the mouse over it.

Create workspace

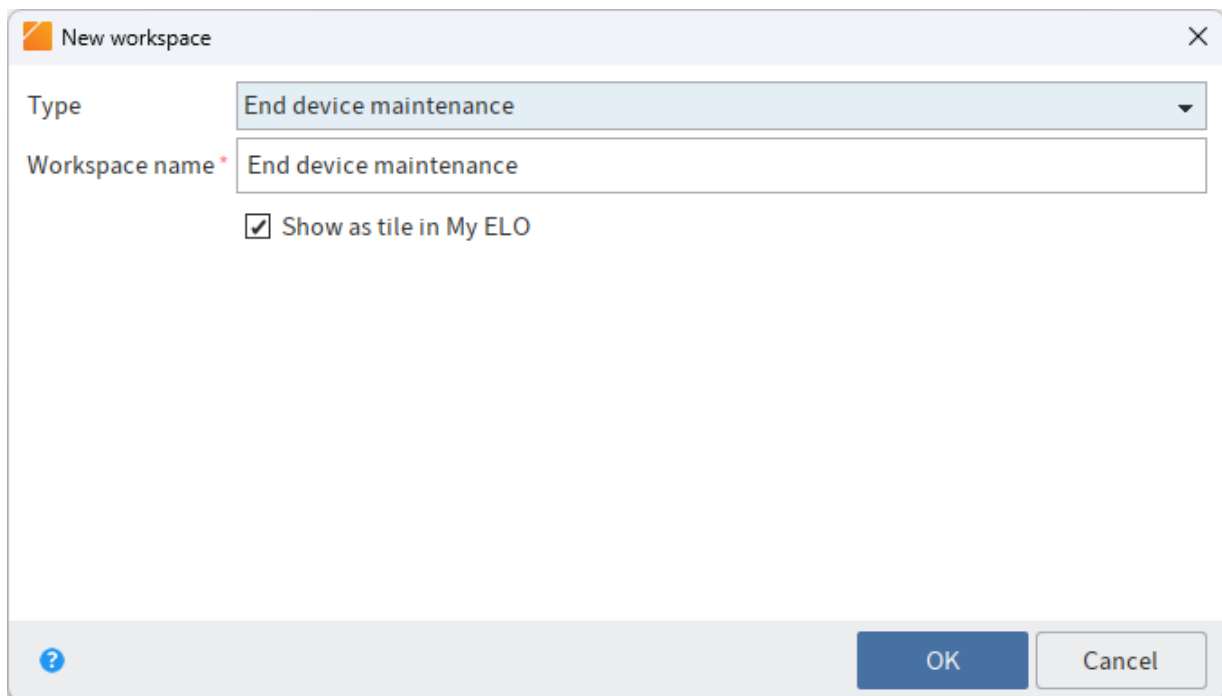
You can create new workspaces.

Requirements

The administrator will already have created workspace types.

Method

1. In *My ELO*, select the *Spaces* tile.
2. Select *ribbon > Spaces tab > New workspace*.



3. In the *New workspace* dialog box, select the type you want to base the workspace on.

- 4.

Enter a meaningful workspace name.

Show as tile in "My ELO": You can create a tile while you are creating the workspace. This only applies to your own client. You can also create the tile later, as described in the Workspace home screen section.

5. Select *OK*.

Result

The workspace is created. You will find it as a tile in the overview of spaces.

Outlook

You will learn how to work with workspaces in the following sections:

- Workspace home screen
- Table
- Kanban board
- Dashboard
- Create object

Create object

You can create objects.

For more information about the concept of objects, refer to the Objects section.

Requirements

- The administrator has configured the functions for the workspace type.
- Your role has permission to the functions.

Method

1. In *My ELO*, select the *Spaces* tile.
2. Open a workspace.
3. On the ribbon, go to the tab with the workspace functions and select the corresponding function. The administrator has configured which object types are possible for each workspace.

New object

Current form: Loans

▼ Loan details

Borrowing number

Medium

Borrowing date

Borrower

End of loan period

Number of renewals

☐ overdue

☐ Expand keyword list automatically ⓘ

OK Cancel

The *New object* dialog box appears with the metadata form appropriate for this object.

4. Complete the fields as required.

Medium

101 Dalmatians

If your object is related to another object, you can establish a connection via relation fields. For more information about the concept of relation fields, refer to the Relations section.

5. Select *OK*.

Result

The object is created in the workspace. It can be found in the *Newly added* area right away and via filters after a short delay.

Outlook

You will learn how to work with workspaces in the following sections:

- Workspace home screen
- Table
- Kanban board
-

Dashboard

Teamspaces

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

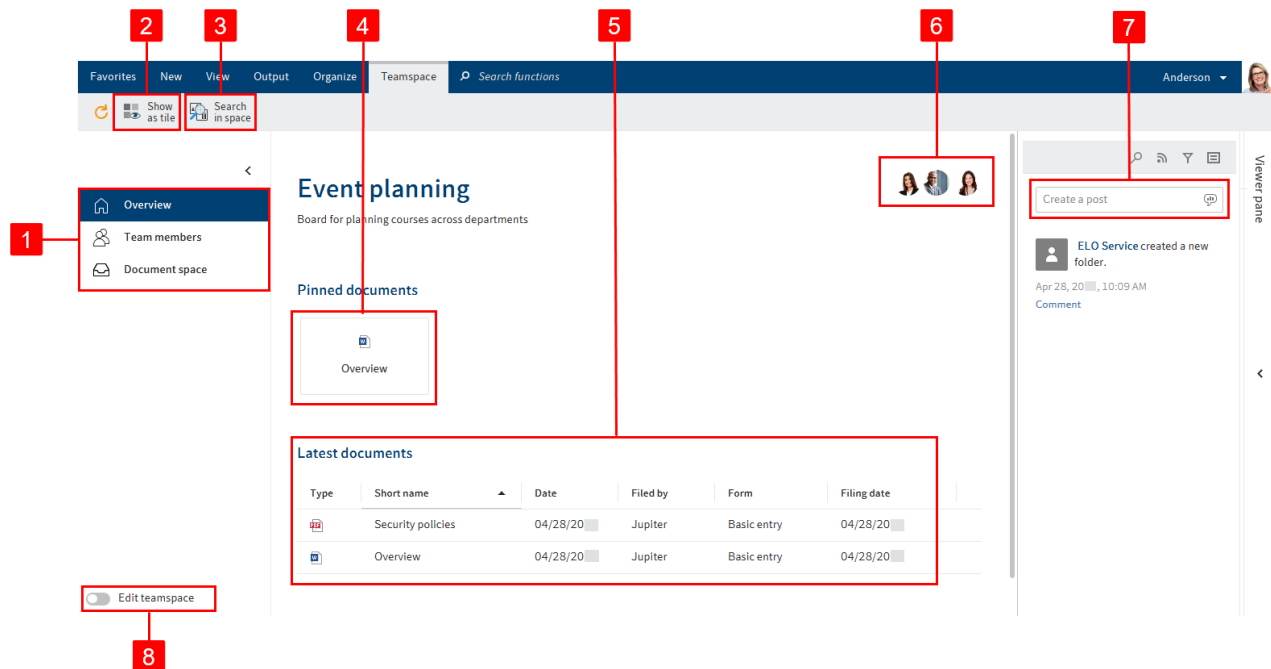
The permissions you have in a teamspace depend on the role you have been assigned by the administrator.

Workspaces can be integrated into a teamspace.

Refer to the Spaces section to learn how to access a teamspace.

'Overview' area

You can access all the elements of the teamspace via the overview of a teamspace. The ribbon features a tab with additional teamspace functions.



You have the following options:

- 1 Teamspace areas: You can navigate between areas in a teamspace. Every teamspace has the areas Overview and Team members. The names and number of additional areas are customized.
- 2 Show as tile: You can create a tile in *My ELO* that provides quick access to the teamspace.
- 3 Search entries in teamspace: Refer to the chapter on Filters for a more detailed description of the search.
- 4 Pinned documents: You can open a pinned document or unpin a document from this space. The Document space chapter explains how to pin a document in a teamspace.

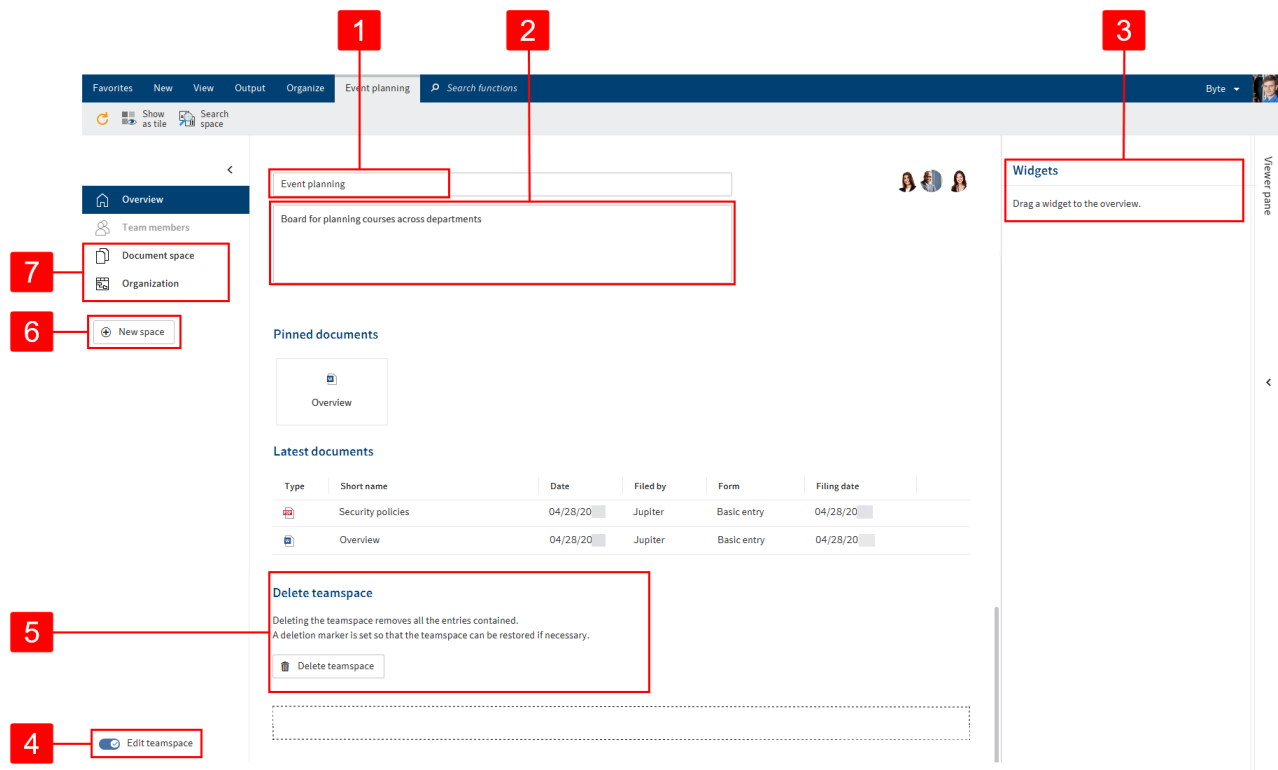
5 Latest documents. You can open one of the latest documents. The Document space chapter explains how to insert a document in a teamspace.

6 Overview of team members: The members of the teamspace are shown here. Select a member to navigate to the *Team members* area. You can only edit members in the 'Team members' area.

7 Enter a feed post: In the *Overview* area, the posts for all entries in the teamspace are displayed in the feed. If a new member or a group is added, a post with the name and role of the member is displayed in the feed and in *My ELO*. Otherwise, the feed works as described in the chapter Feed.

8 Edit teamspace: You can edit the teamspace if you are authorized to do so based on your role.

Edit teamspace



You have the following options:

1 Change the teamspace name

2 Change the teamspace description

3 Add widgets: You can drag widgets to the field in the bottom area of the overview.

4 Close edit mode: All your changes will be saved.

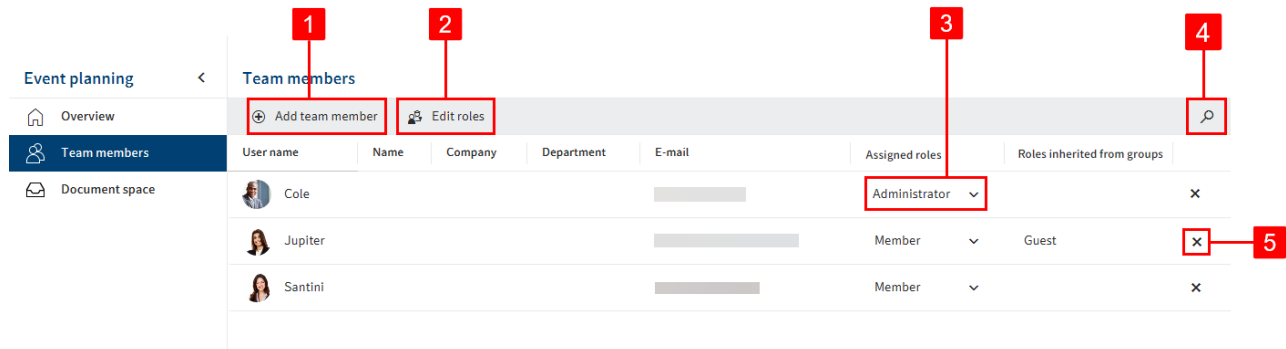
5 Delete teamspace: Deleting the teamspace removes all the entries contained. A deletion marker is set so that the teamspace can be restored by an administrator if necessary.

6 Create new space: Your options are Document spaces and Workspaces.

7 Arrange spaces: You can change the order of document spaces and workspaces using drag-and-drop. The *Overview* and *Team members* areas cannot be moved.

All options that are not listed here can be found in the chapter 'Overview' area.

'Team members' area



You have the following options:

1 Add team members or groups: This also determines the roles of the new team members. It can be changed after creation, however. If you add groups, all members of the group are granted the role set for the group.

Please

New members need to restart ELO to access the space.

2 Edit roles: You can edit the roles if you are authorized to do so based on your role. If team members belong to a group that has been added to the teamspace, they are also granted the roles that the group has in the teamspace.

3 Change team member roles: Team members can have multiple roles.

4 Search for team members

5 Delete team members: Administrators can only be deleted by administrators. The last administrator cannot be deleted.

Roles

The following four roles are available as standard:

Role	Permissions
------	-------------

Administrator	The user who created the teamspace is automatically the administrator. Additional Administrator members can also be named administrators. Administrators have all the permissions to the teamspace and its contents.
---------------	--

Role Permissions

Moderator	Moderators have all the permissions to the teamspace and its contents. The only difference from an administrator is that they are not allowed to delete the teamspace.
Participant	Members can create, edit, move, and delete contents in the teamspace.
Guest	Guests can only read contents.

The roles can be edited.

Edit roles

The default roles can be edited or removed, and new roles can be created.

Method

Select *Edit roles*.

The screenshot shows the 'Edit roles' dialog box. It contains a list of roles with their permissions and a 'Default for new team members' dropdown. Red boxes and numbers highlight key features: 1 points to the '+ New role' button, 2 points to the 'Member' role entry, 3 points to the delete button for the 'Member' role, and 4 points to the 'Default for new team members' dropdown menu.

In the *Edit roles* dialog box, you have the following options:

- 1 Add new role: This is where you define the rights for the role members.
- 2 Edit existing role
- 3 Delete role

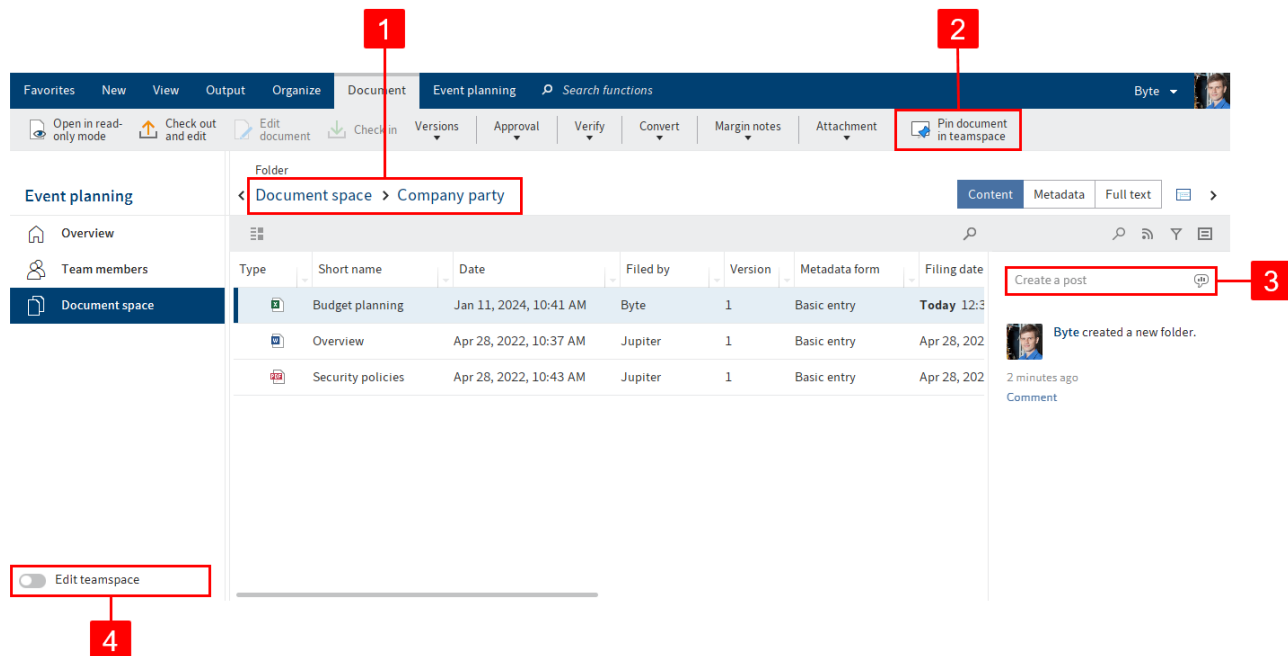
4 Set default for new team members: You can specify in the drop-down menu which role newly created team members are assigned by default. This role can still be changed after creating a member.

Document space

A document space can have any name.

This area works like the viewer pane in the repository. You can create new documents as well as open and edit existing documents.

You can edit the entries using the functions on the ribbon and in the context menu as usual.



You also have the following options here:

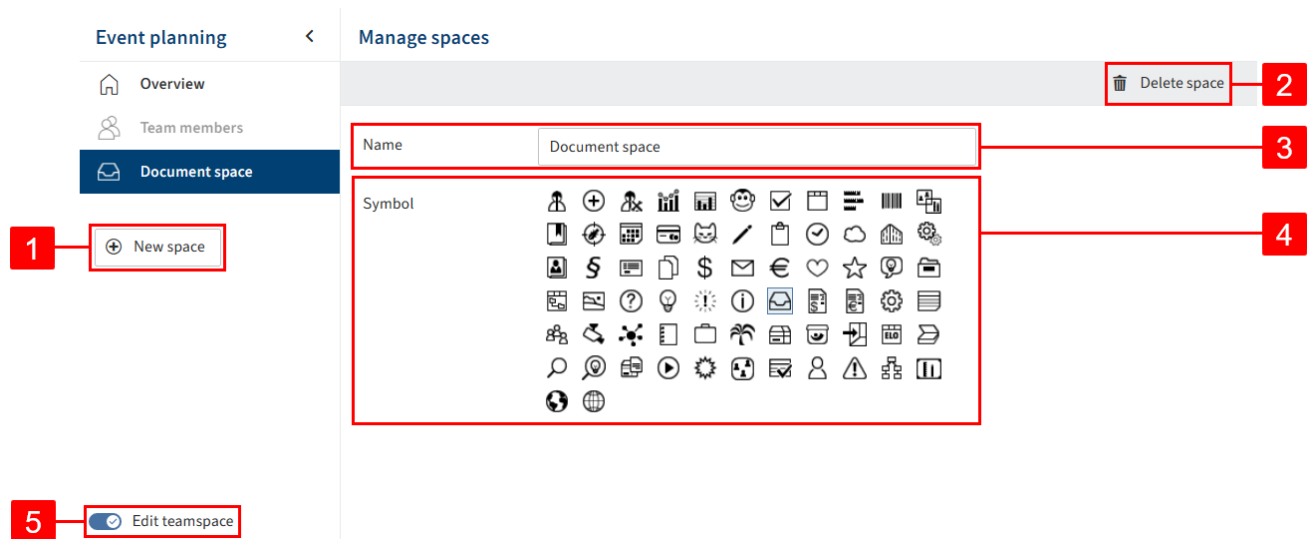
1 Breadcrumb navigation: If you are in a folder, you can go back to a parent folder. In this case, you need to select the name of the folder in the breadcrumb navigation.

2 Pin a document in the *Overview* area: You will find the corresponding function on the *Document* tab.

3 Enter a feed post: The post does not apply to any specific entry, and is instead shown in the document space. Otherwise, the feed works as described in the chapter Feed.

4 Edit the document space: Do this by enabling the *Edit teamspace* slider.

Edit document space



You have the following options:

- 1 Create new space: Your options are Document spaces and Workspaces.
- 2 Delete space
- 3 Change the name of the document space
- 4 Change the icon of the document space
- 5 Close edit mode: All your changes will be saved.

Workspace

A workspace can have any name. A teamspace can also contain multiple workspaces or none at all.

You will find general information in the chapter Workspaces.

You can edit a workspace within a team like a document space.

The members and roles of a teamspace are inherited by the workspace.

Create teamspace

You can create new teamspaces.

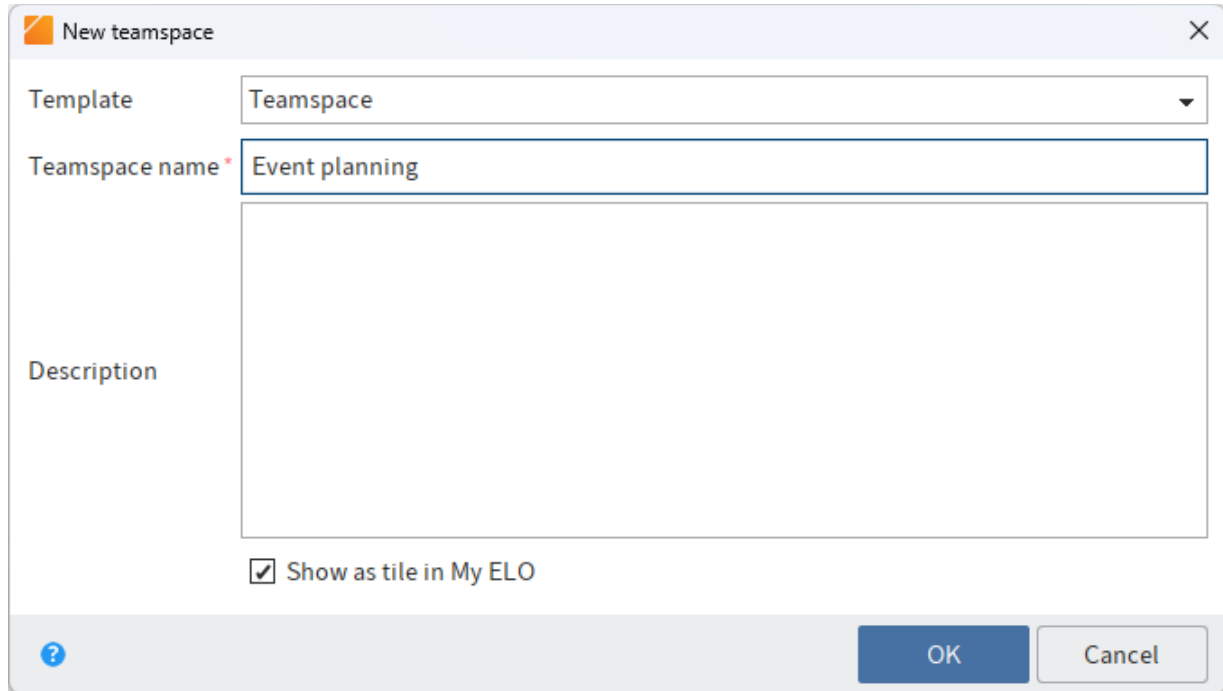
Requirements

The administrator will already have created teamspace templates.

Method

1. In *My ELO*, select the *Spaces* tile.
- 2.

Select *ribbon* > *Spaces* tab > *New teamspace*.



3. In the *New teamspace* dialog box, select the template you want to base the teamspace on.

4. Enter a meaningful teamspace name and, optionally, a description.

Show as tile in "My ELO": You can create a tile while you are creating the teamspace. This only applies to your own client. You can also create the tile later, as described in the chapter 'Overview' area.

5. Select *OK*.

Result

You have created a teamspace. You are automatically entered as the administrator for teamspace you have created.

Outlook

You can now edit the teamspace and add other members.

You will learn how to proceed in the next chapters:

- Edit teamspace
- 'Team members' area
- Edit document space
- Workspace

Edit Microsoft Office documents

Check out to OneDrive

Available in: *Ribbon > Document > Versions*.

Use this function to check out a Microsoft Office document in ELO to Microsoft OneDrive for editing. The document is stored in your OneDrive folder until you check it back into ELO.

This function is only available if you have a Microsoft school or work account with Microsoft OneDrive for Business that has been activated for ELO by an administrator.

Please note

You can only use this function to edit documents with standard file formats such as *DOCX*. The document size is limited to 4 MB.

For documents with older file formats like *DOC*, use the *Check out and edit* function.

Related function

Check out and edit: This function allows you to edit Microsoft Office documents and all other document types.

Method

1. Select the document you want to edit.
2. On the ribbon, select *Document > Versions > Check out to OneDrive*.

Result

The document is opened in a new browser tab.

While you are editing the document, it has the status *Checked out*.

Changes are automatically saved in Microsoft OneDrive.

For explanations of the document synchronization status icons, see the Microsoft documentation [What do the OneDrive icons mean?](#)

Other options:

- Edit in the desktop app: You can open and edit the document in the desktop app.
- Edit collaboratively: You can invite other users to edit the document collaboratively. These users do not need an ELO account for this, but they must have a Microsoft account. For more information, refer to the Microsoft documentation [Share OneDrive files and folders](#).

Please note

You cannot check the document back into ELO until all users who are editing the document have closed it.

Outlook

To save a new document version in ELO, close the document and select the *Check in* button in the ELO Client.

If you want to continue editing the document at some point without checking it in, you can always open it from the following folder *OneDrive - <Name of company> > Apps > <Name of target folder>*.

Please note

You may not be able to check a document in if you are editing it in the Firefox browser and use the uBlock Origin ad blocker extension. In this case, disable the extension or switch it off for the relevant page.