



ELO Java Client

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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:

- Important actions in detail: This chapter introduces you to some important features with detailed step-by-step instructions and explanations. With the help of these instructions, you will learn basic actions in ELO, which can be applied to most other functions. If you initially want to test a function that does not affect your ELO, the Create tile function is a good choice.
- 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.

Important actions in detail

This chapter provides descriptions of some important actions with instructions and explanations.

Functions

The remaining chapters cover the functions that are not described in the *Important actions in detail* chapter. These chapters are named after the area of the program where you find the functions, such as the 'New' tab.

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](#)
- [Accept 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' work area](#)
- [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 logon dialog box appears.

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

2. Select the repository you want to log on 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.

3. Enter your ELO account name and password.

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

4. Select *Sign in*.

Result

ELO opens.

New features

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

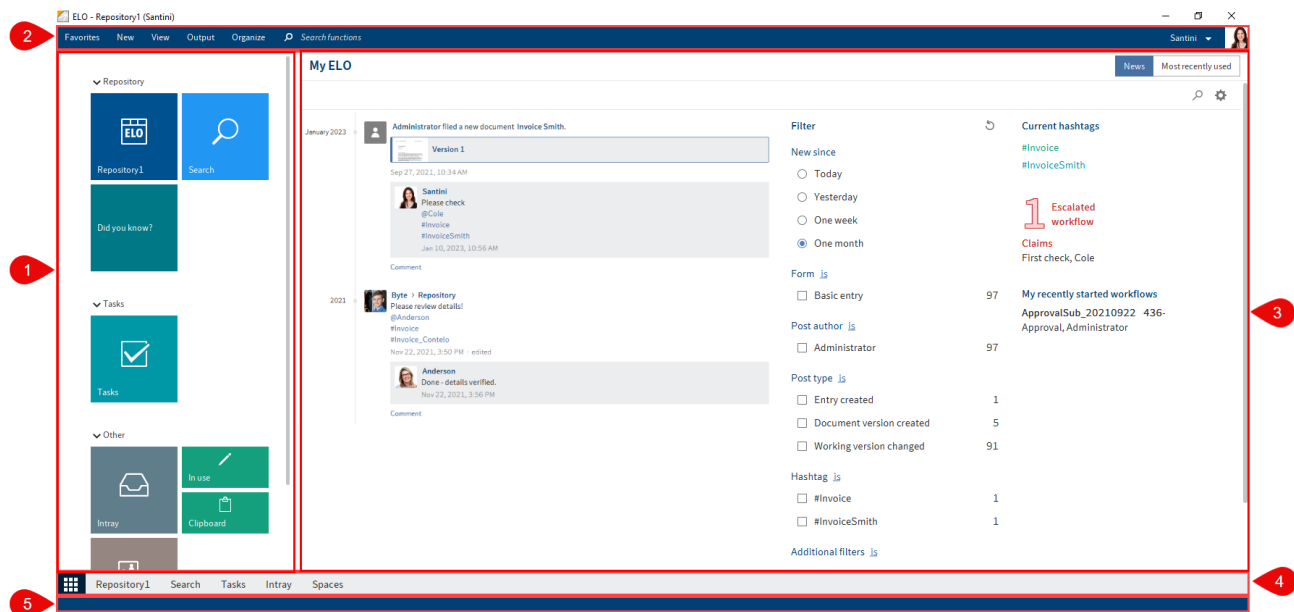
You will find the settings for the color scheme on the *Ribbon > User menu [your name] > Configuration > Color scheme*.

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.

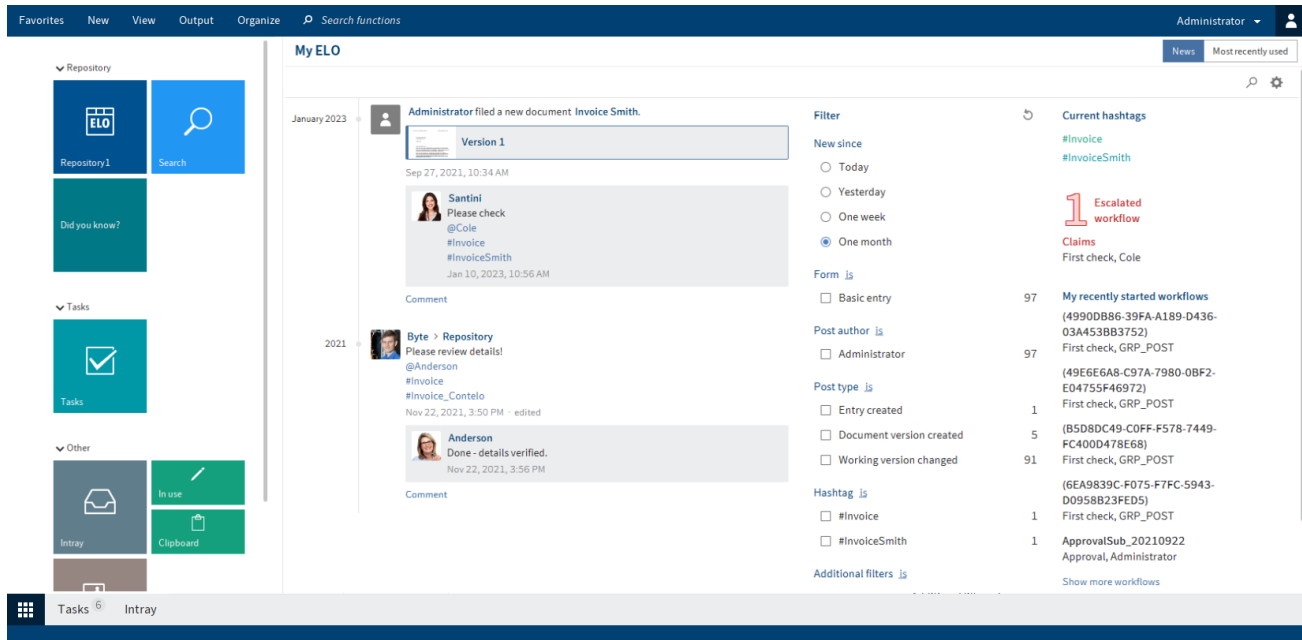
What is a work area?

An ELO client contains different work areas. Each work area is used to complete specific tasks. Accordingly, not all functions are available in every work area.

The ELO Java Client 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: When you edit a document, it automatically appears in the *In use* work area. Editing a document means that you have checked it out using the *Check out* function.

'My ELO' work area



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.

Open the *My ELO* work area using the button at the bottom left of the screen.

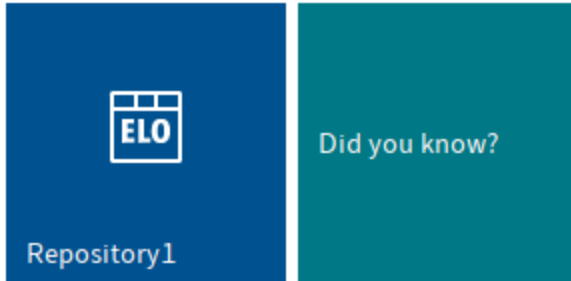
The *My ELO* work area contains the following areas:

- Tile navigation: Use the tiles to switch to other work areas.
- News: Feed posts relating to different entries are displayed in the *News* area. For example, you will see posts from subscribed feeds or posts you were mentioned in. You will also find an overview of your workflows as well as current hashtags.
- Most recently used: The *Most recently used* area contains a list of documents that you recently viewed or edited. This way, you can quickly access these entries again.

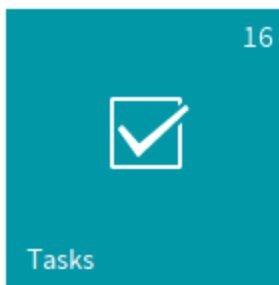
Tile navigation

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

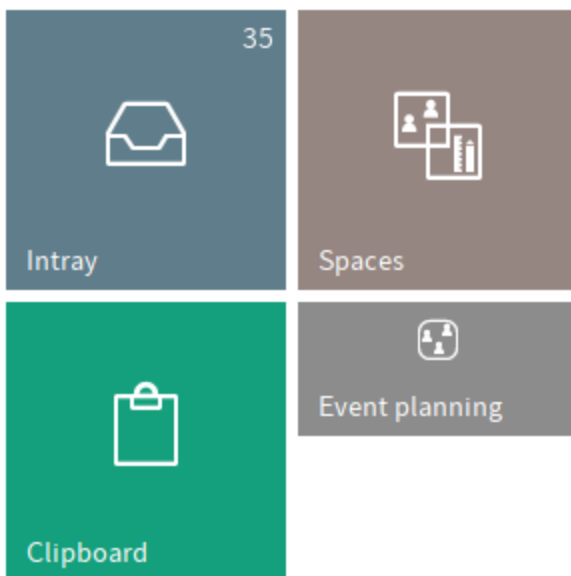
▼ Repository



▼ Tasks



▼ Other



➤ Hidden tiles

You can create new tiles for folder and task views. Use the function *New view* (available in: *Ribbon > View*).

You can group and edit tiles using the context menu.

Groups

By default, the tile navigation area is divided into the groups *Repository*, *Tasks*, *Other*, and *Hidden tiles*.

You can edit the groups using the context menu. To open the context menu, right-click the group name. The following functions are available:

Add group: Use the *Add group* menu item to create your own groups in the tile navigation area.

Rename group: Use the *Rename group* menu item to change the respective group name. This function is only available for your own groups.

Delete group: Use the *Delete group* menu item to delete the respective 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 client 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 the ELO Java Client. Changes made prior to that session are retained.

Edit tile

You can customize tiles in ELO. You can make a number of tile settings straight from the tile's context menu. You will find other settings in the *Tile settings* area.

Information

You can create new tiles for folder and task views. Use the function *New view* (available in: *Ribbon > View*).

Context menu

You can make a number of tile settings straight from the tile's context menu. Right-click the tile to open the context menu.

You can make the following settings:

- Pin to the navigation bar
- Show tile overlay in drag-and-drop
- Shrink/enlarge tile
- Hide
- Delete view (only for tiles you created yourself)

Information

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

Tile settings

Open the *Tile settings* area from the *context menu (right-click) > Settings*. You can make the following settings in the *Tile settings* area:

- Name
- Color
- Icon
- Size
- Pin to the navigation bar, show tile overlay in drag-and-drop, show number of entries, diagram view
- Keyboard shortcut to open the tile

Information

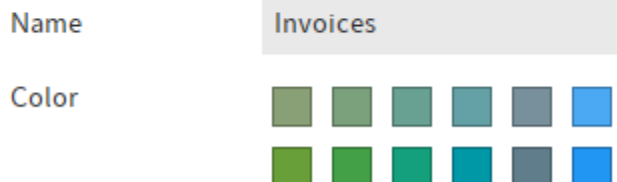
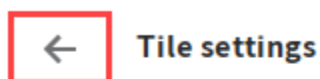
Different settings are available depending on the type of tile you want to edit.

Information

When you click another tile in edit mode, you switch to edit mode for the tile you clicked.

Several settings are described in more detail below.

Save changes



To close edit mode and save the changes, click the arrow pointing left.


Edit name

You can change the name of tiles you created yourself (repository views and task views). Select *Edit view* for this.

 Tile settings

Name

Color



Options

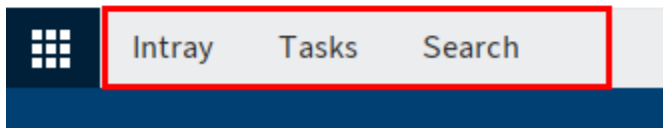
You can select different options depending on the type of tile you are editing.

Pinned to the navigation bar: Click this option to pin the tile to the navigation bar.

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



> Hidden tiles



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.

The screenshot shows the ELO Java Client interface. On the left is a navigation tree with the following structure:

- Finance
 - Orders
 - 2018
 - Invoices
 - [2] Invoice Krammper GbR (selected)
 - Invoice expected
 - Invoice received
 - Invoice expected
 - Project data

The main workspace displays a grid of tiles for 'Invoice Krammper GbR'. A red box highlights a 3x2 grid of tiles:

Repository	Metadata form	Current version 2
Offers	Version control	Tasks
Intray	Clipboard	Clipboard

Show number of entries: If this option is enabled, the number of entries in an area is displayed in the tile.

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*.

Keyboard shortcut

You can assign a keyboard shortcut for quick access to a tile. Click the field and enter the desired keyboard shortcut.

Please note

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

News

Feed posts related to different entries are displayed under the *News* tab. For example, you will see posts from subscribed feeds or posts you were mentioned in. You will also find an overview of your workflows as well as current hashtags.

Information

If you don't see any posts in the *News* work area, check your filter settings. It is possible that there are no posts for the selected period (under *New since*).

The news tab contains the following areas and functions:

Feed: The feed contains posts related to different entries. This can include feeds you have subscribed to or in which you have been mentioned. New feed posts are denoted with a green dot.

Filter: You can filter the feed posts. In the *News* area, you can filter the posts by date (*New since*) or by the user that created the post (*Post author*).

Information

If you don't see any posts in the *My ELO* work area, check your filter settings. It is possible that there are no posts for the selected period (under *New since*).

Search feed: Select the *Search feed* (magnifying glass icon) button to open a search field. Enter a search term and select *Search*. The search results are displayed. Any matches are highlighted.

Use *Reset search* (X icon) to delete the content of the search field. The feed posts are displayed in *My ELO* according to the filter settings.

Settings: Select the *Settings* button (gear icon) to open the *Settings* pane. This pane contains the options for *My ELO settings*, *My subscribed hashtags*, *My polls*, and *My profile* (person icon at the top right).

Current hashtags: Trending hashtags in ELO are listed here. Clicking a hashtag opens the overview for the selected hashtag, where all posts marked with the hashtag are shown.

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.

Clicking the workflow name takes you to the workflow in the *Tasks* work area.

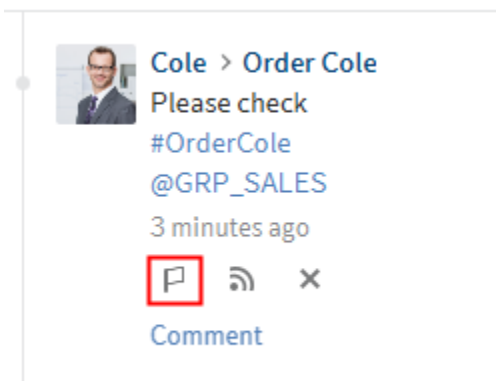
Feed functions

The standard feed functions, e. g. create a post, or refer to a document, are described in the Feed chapter.

You will recognize who created a feed post based on the name and profile picture. You can read how to edit your profile in the chapter Edit profile. To view another user's profile, click on the profile image or the user name.

In *My ELO*, you can also mark feed posts as important or hide them.

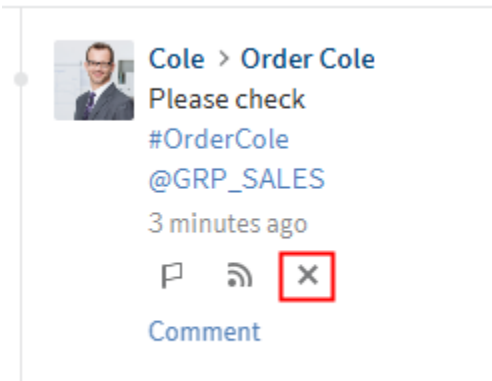
Mark post as important



Posts older than one month are removed from the *My ELO* work area. To show posts in *My ELO* permanently, you can mark them as important. The *Mark as important* button (flag icon) lets you pin a post to the *My ELO* work area. The post remains in *My ELO* even if it is more than one month old. You can recognize posts that are marked as important by the red flag icon.

To delete the marker, click the red flag icon. As soon as the post is more than a month old, it will no longer be displayed in the *My ELO* work area.

Hide post



If you no longer want to see a post, you can hide it in the *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.

Information

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: Filter the feed by the date the post was created. You can choose between: *Today*, *Yesterday*, *One week*, and *One month*.
- Metadata form: Filter the feed by the metadata form of the entries that the post is related to.
- Post author: Filter the feed by the users who created posts.
-

Post type: Filter the feed by the type of post. There are two post types: Automatically created posts (e.g. *Document version created*) and posts created by users (*User posts*).

- Hashtag: Filter the feed by hashtags.
- Additional filters: Depending on the settings, additional filters are available, e. g. filter by posts you are mentioned in.

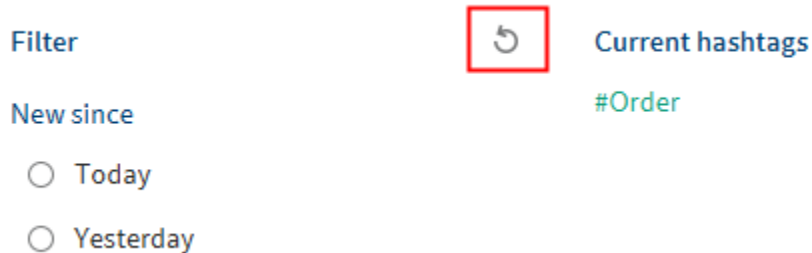
Information

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.

Apply filters

To apply a filter, select the corresponding filter in the list.

Reset filters



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

Most recently used

Filter		
→	📄 Planning	Jan 26, 2023, 12:59 PM x
→	📄 Offers	Jan 26, 2023, 12:58 PM x
→	📄 Marketing	Mar 28, 2022, 12:42 PM x
→	📄 EXTEN	Mar 21, 2022, 10:12 AM x
→	📄 Offer-Zastry_2020_0001	Mar 21, 2022, 10:12 AM x
→	📄 Orders	Mar 21, 2022, 10:12 AM x
→	📄 Invoices	Mar 21, 2022, 8:54 AM x
→	📄 Finance	Jan 17, 2022, 11:56 AM x

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

You can pin entries to the top of the list with the pin icon.

To remove an entry from the list, click the X icon.

A search field for filtering the entries appears if there are more than ten entries.

Information

The maximum number of entries in the *Most recently used* area is 100 by default. You can change this value in the configuration (*Ribbon > User menu [your name] > Configuration > Display > Maximum number of documents in the "Most recently used" list*).

'Repository' work area

The *Repository* work area is the central work area of the client. This is where you manage your documents and data. For example, you can create new documents and folders, open documents in read-only mode, or send documents in different formats.

The screenshot shows the ELO Java Client interface. The left sidebar (Repository structure) contains a tree view of folders and documents, with '[4] Invoice Contelo GmbH' selected. The central viewer (View of entries selected) displays an invoice for 'Contelo GmbH' with a barcode and a table of items. The right sidebar (Comments and Versions) shows a list of document versions and comments.

Pos.	Item no.	Description	Quantity	Unit price	Net	VAT	VAT amount	Gross
1	ADDD-PP-EN	ELOOffice brochure	50	0,75 €	37,50 €	19%	7,15 €	44,65 €
2	ADDD-PP-EN	ELOProfessional brochure	50	1,35 €	67,50 €	19%	12,83 €	80,33 €
3	ADDD-PP-EN	ELOEnterprise brochure	50	1,85 €	92,50 €	19%	17,58 €	110,08 €
4	ADDD-BAPEN-03	ELO pen	500	1,75 €	875,00 €	19%	168,25 €	1.043,25 €
5	ADDD-QUAD-00	ELO notepad	500	4,25 €	2.125,00 €	19%	403,75 €	2.528,75 €
Total amount					3.187,50 €		607,53 €	3.895,03 €

The *Repository* is divided into the following areas:

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' work area

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 displays the ELO Java Client interface in the Search work area. The ribbon includes tabs for Favorites, New, View, Output, Organize, Document, and Search. The Search tab is active, showing a search bar with the query 'EX10' and a list of search results. The results table has columns for Type, Short name, and Date. The selected result is 'EX10_Invoice_Contelo_0753' from Nov 22, 2021. The main pane shows a preview of the invoice document, including the EX10 logo, company address (EX10 Ltd, 42 Winchester Road, Boumemouth BH1 1AL), contact information, and invoice details (Invoice number: EX10-2112, Date: 11.03.2019, Order number: 00634, Customer number: 0005670). A sidebar on the right shows a notification: 'Byte filed a new document. Version 1' on Nov 22, 2021, 3:49 PM.

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.

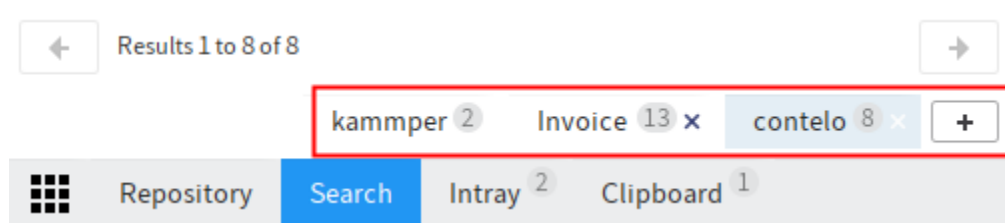
The chapter '*Search*' tab contains information on how to search the metadata using a form or create a dynamic folder.

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

If you use the *New view* function (plus icon at the end of the search results list) in the *Search* work area, you 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

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

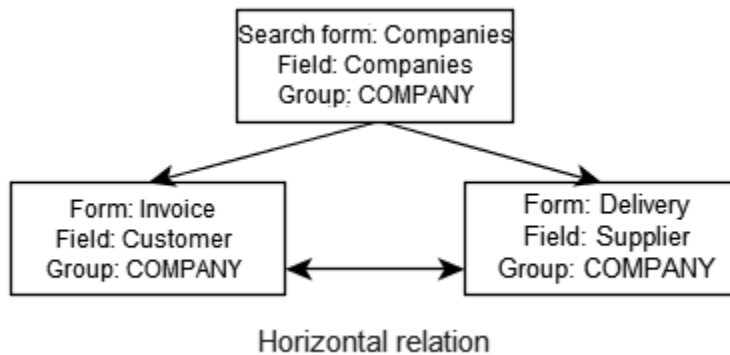
You do not need to use the wildcard * in the *Short name*, *Date*, or *Extra text* fields. ELO displays all documents that contain the character string in the field in whatever form.

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' work area

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)

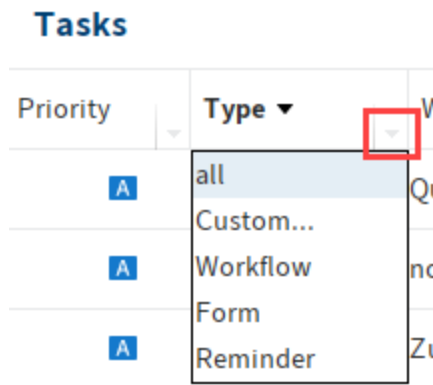
The tasks are sorted according to their priority: A (high), B (medium), and C (low). Overdue tasks are denoted with a red icon with a white exclamation mark. New unread tasks are denoted with a green dot. You can mark a task as unread via the context menu (right-click or MENU key).

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] > 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.



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*).

Click an entry in the task list to view its contents in the viewer pane.

For workflows with forms, you will find the form on the *Form* tab. You can edit and forward it here.

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

- Workflows:
 - Actively: You forward the workflow using the form 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:

- Functions on the 'Task' tab
- Start workflow
- Forward workflow
- Create reminder
- Monitor entry

'Clipboard' work area

The *Clipboard* work area is where you can temporarily store documents and folders. You can also create a favorites list here.

The screenshot shows the ELO Java Client interface. The main window displays an invoice document titled "Multipage order 2(TIF, BW, 200 DPI)". The invoice details include: ELO Digital Office GmbH, Customer: Conleto GmbH, Order date: 03/01/2010, and a table of items with quantities and prices. The total amount is 3,197.90 €. The interface also shows a sidebar with document thumbnails and a right-hand panel with user activity and version history.

Pos.	Item no.	Description	Quantity	Unit price	NET	VAT
1	A060-PO-EN	ELOOffice brochure	50	0,75 €	37,50 €	19%
2	A060-PP-EN	ELOProfessional brochure	50	1,35 €	67,50 €	19%
3	A060-PE-EN	ELOEnterprise brochure	50	1,85 €	92,50 €	19%
4	A003-BAPEN-00	ELO pen	1000	1,75 €	875,00 €	19%
5	A000-GUAD-00	ELO notepad	1000	4,25 €	2,125,00 €	19%
Total amount					3,197,90 €	

To transfer a folder or document from the *Repository* work area to the *Clipboard*, select the folder or document and select *Copy to Clipboard* on the ribbon (*View > Navigation*). 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.

To remove entries from the *Clipboard* work area, use the *Remove from Clipboard* function. You will find the *Remove from Clipboard* function on the ribbon (*View > Navigation*) or in the context menu.

'In use' work area

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 bar. The 'In use' work area is active, showing a list of documents with columns for 'Type', 'Status', and 'Short name'. The main document viewer displays an invoice for 'Multipage order 2(TIF, BW, 200 DPI)' with the following details:

Invoice: Version 3 of May 30, 2018 Administrator
Multipage order 2(TIF, BW, 200 DPI)

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

Pos.	Item no.	Description	Quantity	Unit price
1	A090-PO-EN	ELO Office brochure	50	0,75 €
2	A060-PP-EN	ELO professional brochure	50	1,95 €
3	A050-PE-EN	ELO enterprise brochure	50	1,65 €
4	A000-BAPEN-00	ELO pen	1000	1,75 €
5	A000-GUAD-00	ELO notepad	1000	4,25 €
Total amount				

Order date: 03/01/2010
 Customer advisor: Felix Unger
 Contact person: Sandra Rienz

The right sidebar shows a comment history:

- Cole is editing the entry.
- Administrator saved a new working version of this document. (Version 3 Approval, May 30, 2018, 5:05 AM)
- Administrator @Byte Can you check if the invoice has been paid? (Apr 17, 2018, 1:30 AM)
- Byte Yes, no problem. (Apr 17, 2018, 1:30 AM)
- Farrell saved a new working version of this document. (Version 2 Updated, Mar 5, 2018, 4:11 AM)

The bottom status bar shows: 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' work area

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. The top menu bar includes 'Favorites', 'New', 'View', 'Output', 'Organize', 'Document', and 'File'. The 'File' tab is active, showing a ribbon with 'Scan functions'. The main area is divided into an 'Intray' list on the left and a document preview on the right. The 'Intray' list shows three documents: '[EX10_2020_Invoice_Contelo.docx]', '[Multipage order 2(TIF, BW, 200 DPI).TIF]', and '[Scan_20200513840284.tif]'. The selected document is 'Multipage order 2(TIF, BW, 200 DPI)'. The preview shows a multi-page document with an invoice page visible, including contact information for ELO Digital Office GmbH and invoice details.

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 chapters Scan a document to the Inray and file it and 'File' tab.

Spaces

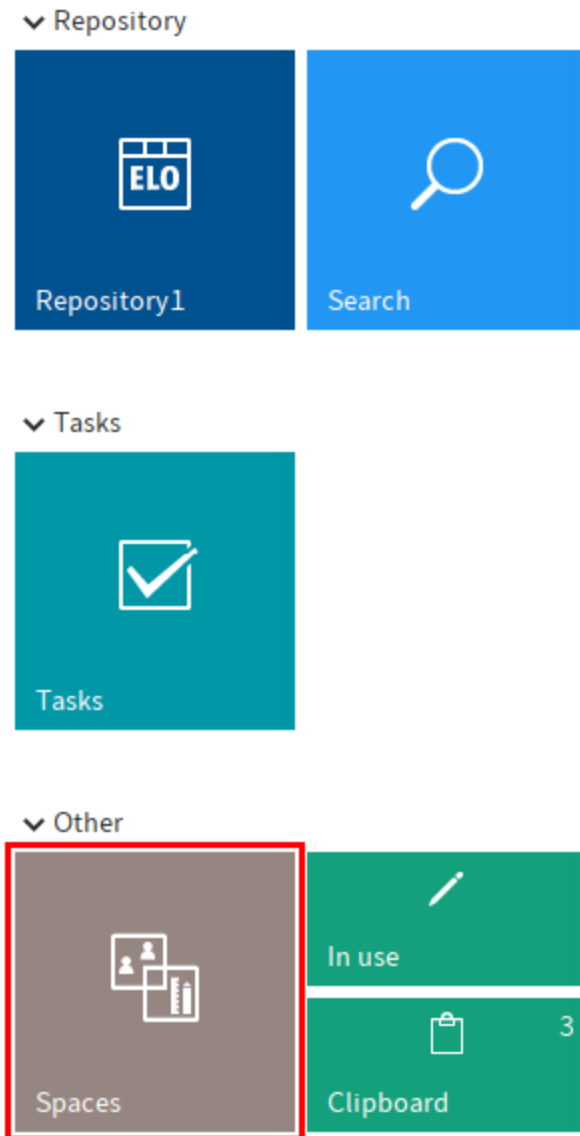
Spaces are areas where you can collaborate with other users. You can file new entries and work on them with members of the space.

Workspaces are workspaces 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.

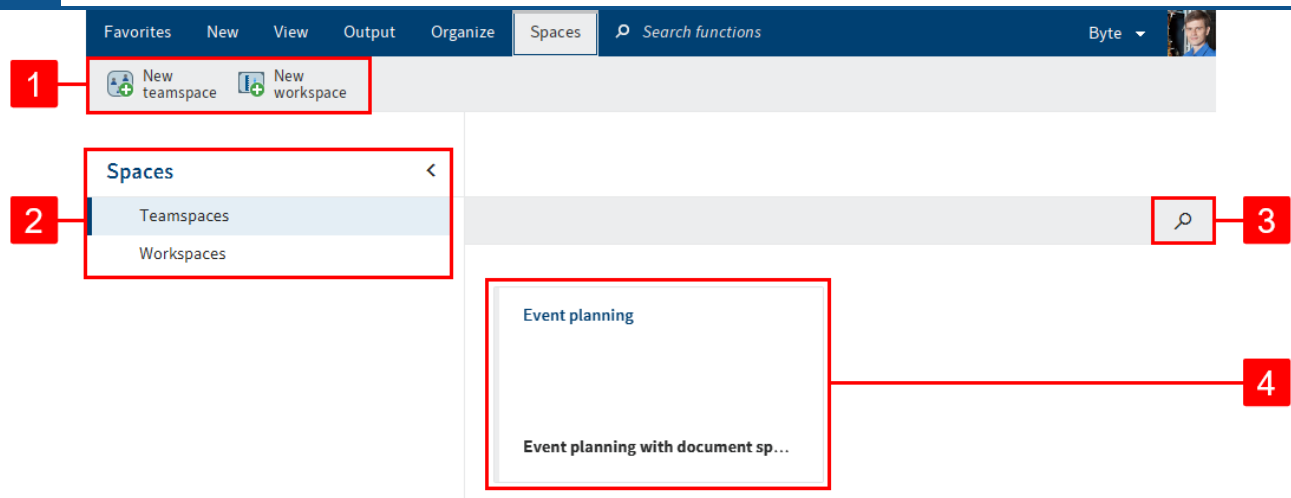
The *Teamspace* function enables you to collaborate across teams. All teamspace members can gather and edit documents together and exchange information using the feed.

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.



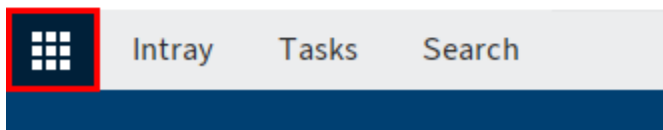
In the overview of spaces, you have access to the *Spaces* tab.



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



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.

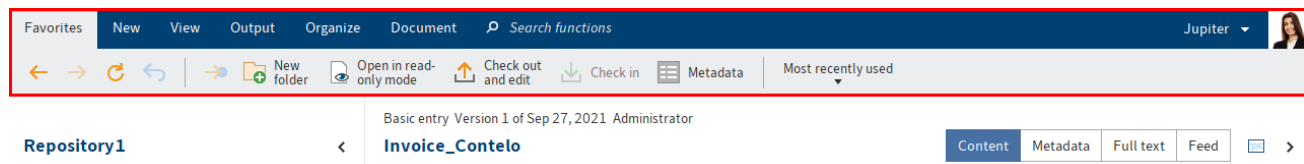
Here, you will find your news and most recently used entries, as well as the tile navigation.

If *My ELO* is highlighted in green, this means you have news in *My ELO*.

For more information, refer to the chapter 'My ELO' work area.

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
- Display
- Output
- Organize

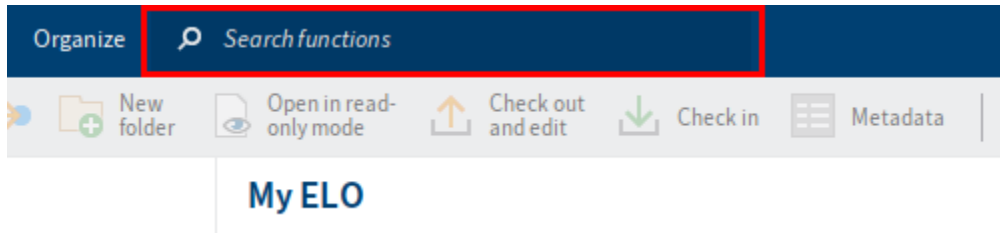
The contextual tabs are:

- 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.

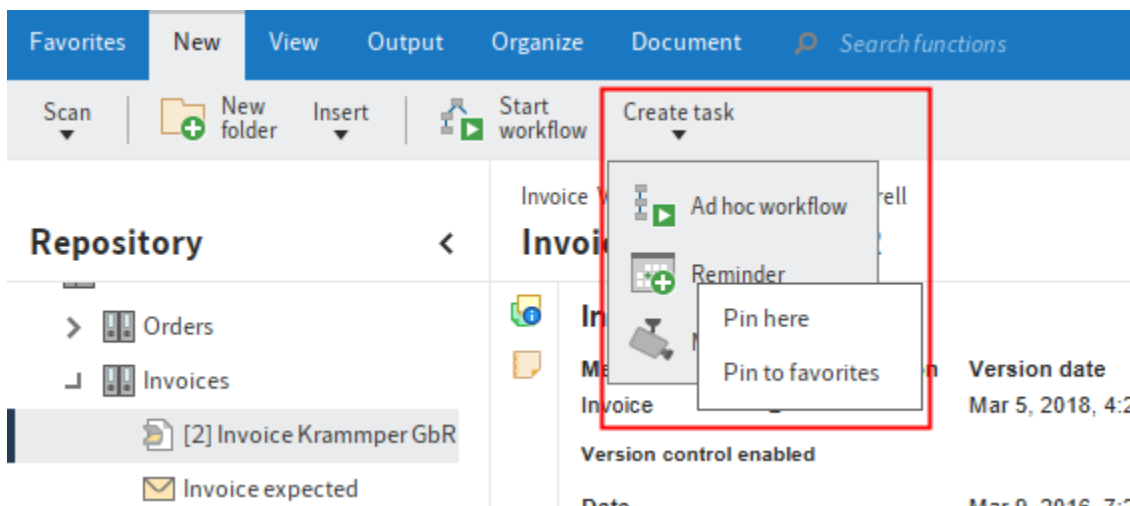
Customize the ribbon

There are different ways that you can personalize the ribbon:

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

Pin/unpin functions

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

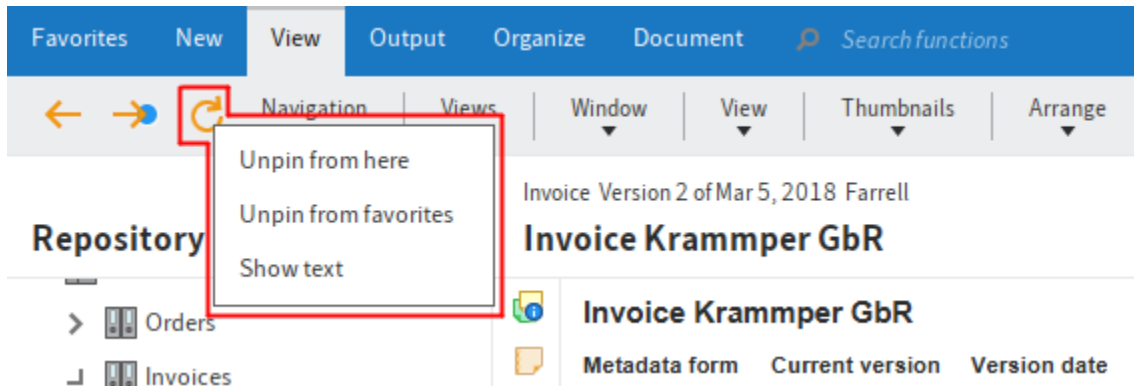


Right-click the desired function. The context menu opens. In the context menu, click *Pin here*. The function now appears on the ribbon.

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

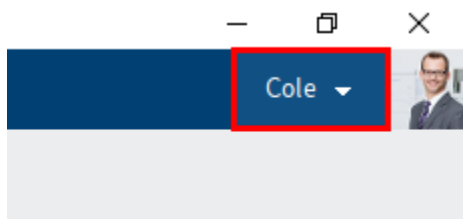
Show/hide text

Some functions are only displayed as icons on the ribbon. The name of the function is not shown. You can have the name displayed next to the icon. Right-click the desired function. The context menu opens. In the context menu, click *Show text*. The name of the function now appears on the ribbon.



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

User menu [your name]



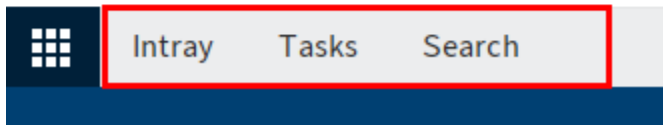
You will find the user menu under your name on the ribbon. The user menu provides access to the configuration where you can edit your profile or appoint a substitute, for example. You can also log off at the end of your session here.

For more information, refer to the chapter [User menu \[your name\]](#).

Navigation bar



> Hidden tiles

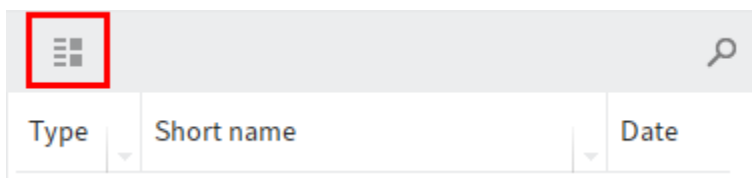


The navigation bar provides quick access to several areas and shows you which area you are currently in.



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

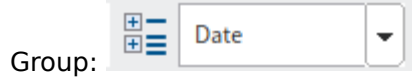
You can pin all areas available as tiles in *My ELO* to the navigation bar by right-clicking the tile.

Toolbar



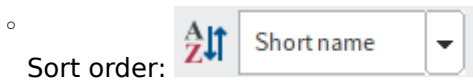
You can change the display options of the entries via the gray toolbar. The following options are available depending on the work area you are in:

-  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.
 -



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.




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. Use the *Expand/Collapse* function 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.

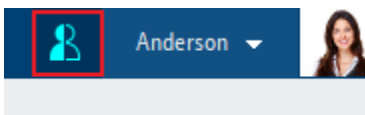
Metadata form: Select a metadata form from the drop-down menu.

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

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 chapter 'Favorites' tab. The method for the context menu is the same as for the *Favorites* tab.

Navigation and use

This chapter provides information about the general use of the ELO Java Client. You can find information on specific actions in the chapters about the actions or the tabs.

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 chapter 'My ELO' work area.
- **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.

Use functions

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.

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 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.

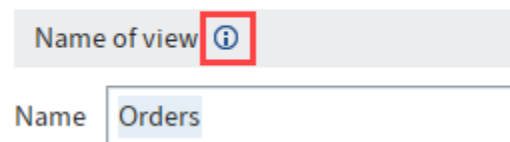
2. Type in the first letters of the entry name.

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.

Open ELO in-program help

There are different ways to use the in-program help functions in the ELO Java Client.

 New view



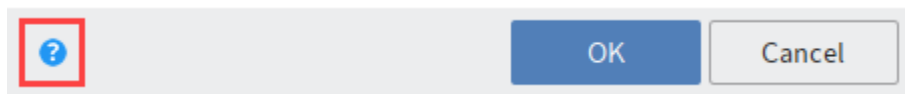
Name of view ⓘ

Name Orders

In many dialog boxes, you will see an info icon next to the name. If you mouse over the info icon, you will see a detailed explanation of the function.

If you require additional information, you can also refer to the ELO documentation. The following options are available:

- Press the F1 key.
- Select the question mark icon in dialog boxes.



- Open the in-program help under *Ribbon > User menu [your name] > Help*.

Simple operation

Contrast settings

There are four 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.

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 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.

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	

Function	Keyboard shortcut	Note
Tasks work area	CTRL + 4	
Clipboard work area	CTRL + 3	
In use work area	CTRL + 5	
Intray work area	CTRL + 2	
Help	F1	invariable
Configuration	F12	invariable
About	CTRL + I	
User feedback	F11	
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 Intray.
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	

Logon dialog box**Function Keyboard shortcut**

Profiles CTRL + P

Important components

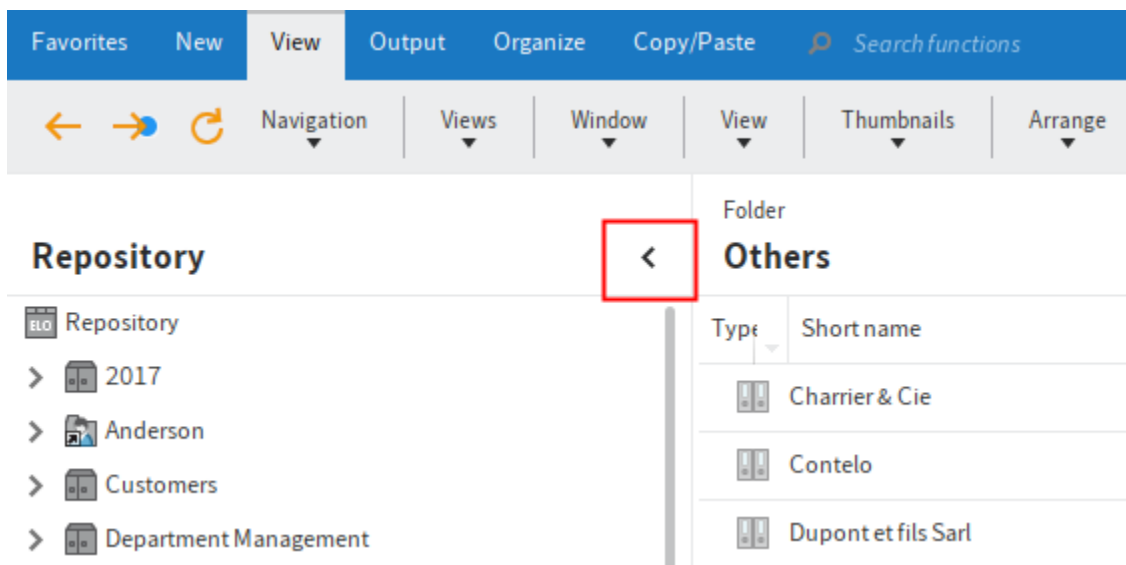
Repository structure

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

Tree only

The screenshot displays the ELO Java Client interface. The top menu bar includes 'Favorites', 'New', 'View', 'Output', 'Organize', 'Document', and 'Search functions'. Below the menu bar are several action buttons: 'Open in read-only mode', 'Check out and edit', 'Edit document', 'Check in', 'Versions', 'Approval', 'Verify', 'Convert', 'Margin notes', and 'Attachment'.

The main area is divided into two panes. The left pane, titled 'Repository', shows a tree structure of folders and files. The right pane, titled 'Letter - Renz Note', displays an email from Sandra Renz to Altustrics Inc. dated October 10, 2013. The email subject is 'RE: Office furniture tender' and the body text discusses the purchase of office furniture and requests for delivery and setup completion by November 30, 2013.

The repository tree structure is as follows:

- Repository
 - > 2017
 - > Administration
 - > Administrator
 - > Customers
 - > Department Management
 - > Department Marketing
 - Documentation
 - Scanned documents
 - > Barcode documents
 - > Manuals
 - > Document templates
 - Sample documents
 - ELO Digital Office GmbH
 - [6] [Administrator] Letter - Renz Note
 - [3] [Cole] List of materials (xl:)
 - [2] ELO booth (jpg)
 - [2] Washington
 - shuttle
 - Sound file
 - Company presentation
 - Schulze and Boss 3
 - [6] Multipage order 2(TIF, BW)

The email content in the right pane is:

E-mail Version 5 of Mar 21, 2018 Cole

Letter - Renz Note

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!

Sincerely,

Sandra Renz

The bottom status bar shows '18.8 KB' and the breadcrumb 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 displays the ELO Java Client interface with the 'Tree and table' view enabled. The top navigation bar includes 'Favorites', 'New', 'View', 'Output', 'Organize', 'Document', 'Search functions', and 'Administrator'. Below this is a toolbar with icons for 'Open in read-only mode', 'Check out and edit', 'Edit document', 'Check in', 'Versions', 'Approval', 'Verify', 'Convert', 'Margin notes', and 'Attachment'.


The main interface is divided into three sections:


- Repository (Left):** A tree structure showing folders such as '2017', 'Administration', 'Administrator', 'Customers', 'Department Management', 'Department Market', 'Documentation', 'Sample documents', 'Dynamic folders', 'dynfolder', 'ELO Scan Connecto', 'ELOcv Base', 'ELOj', 'E-mail', and 'Employee profiles'. The 'Sample documents' folder is selected, and its contents are listed in a table.
- Table (Middle-Left):** A table with columns 'Typ' and 'Short name'. It lists various documents including '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.', and 'Annual budget'.
- Viewer (Right):** Displays the content of the selected document, 'Letter - Renz Note'. It shows metadata (E-mail, Version 5, Date: Mar 21, 2018, 2:16 AM, Editor: Cole), version control information, and the document body text. The text includes a contact address for Sandra Renz and a business address for Altustrics Inc., followed by a date 'October 10, 2013' and a subject line 'RE: Office furniture tender'. The body text discusses the purchase of office furniture and requests for delivery and setup completion by November 30, 2013.

The bottom status bar shows '1 of 0 entries selected' and the breadcrumb path: '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.

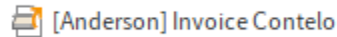
Reference

 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

Repository1 < Exchange

Type	Short name	Date	Filed by	Version
W	99 Sample ELO Script	Jun 3, 2020, 1:02 AM	Cole	1
[Arrow]	[Anderson] Invoice Contelo	Nov 25, 2013, 12:00 PM	Administrator	
PDF	Offer-EX10_Zastry_2016-540	Jun 3, 2020, 12:48 AM	Cole	1
PDF	Offer-EX10_Zastry_2016-540	Apr 12, 2016, 1:21 PM	Administrator	1
PDF	Offer-EX10_Zastry_2019-445	Apr 12, 2016, 1:20 PM	Administrator	1
PDF	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 can save it (*Ribbon > Output > Save as*), open it in read-only mode (*Ribbon > Document > Open in read-only mode*), or switch the view as described in the following.

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.



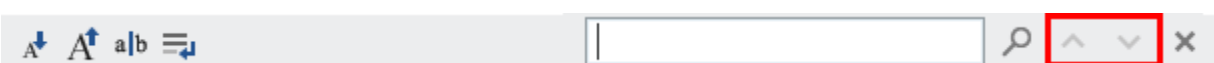
Fixed font width: Switches the display to a non-proportional font so that all characters are displayed with the same spacing. This improves readability, e.g. of code.



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.

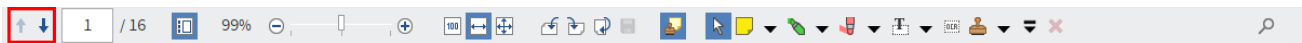
Use the arrow icons to display the next or previous match in the text.

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 chapter 'Favorites' tab.

Image preview ('Content' tab)

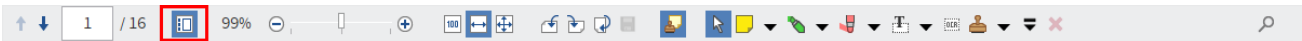
The ELO Java Client offers additional control elements in the viewer pane for displaying images (formats: JPG, TIFF, PNG, etc.) and PDF documents. You can also set this as the display mode for documents with specific file extensions.



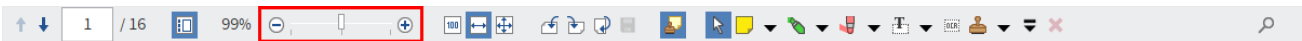
Next or previous page: The next or previous page of a multi-page document is displayed.

Information

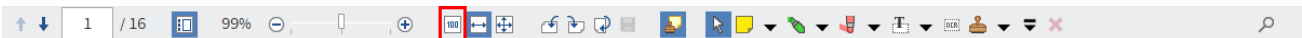
You can change the order of pages in a TIFF document with multiple pages. You will find more information here: [Move pages](#).



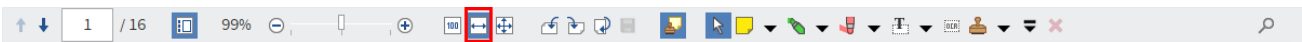
Show thumbnails of pages: If you select this option, the pages of documents with multiple pages are displayed as thumbnails. Click on a thumbnail to go to the page.



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.



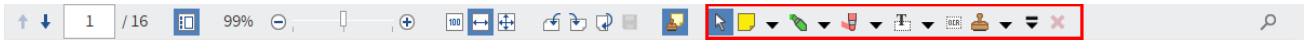
Fit image size to the frame: The image is adjusted to the height of the viewer pane so that the entire page of the document is displayed.



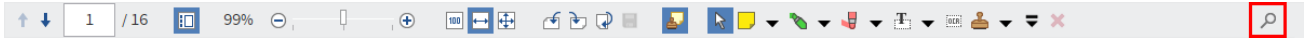
Rotate document: Rotates the document 90 degrees or 180 degrees. You can save the rotated document as a new version.



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.



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.

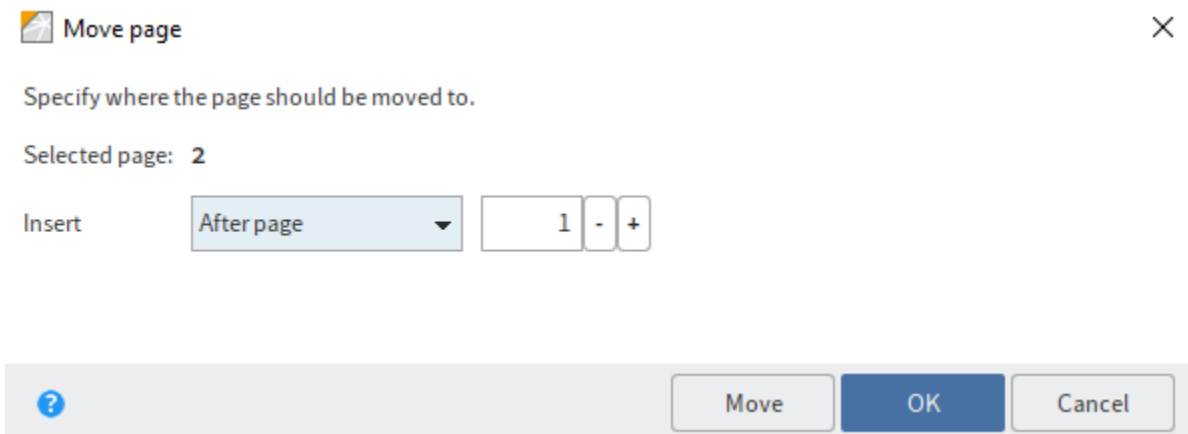
Move pages

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 or document).

The screenshot shows the ELO Java Client interface. At the top, there is a search bar and a user profile for Anderson. Below that, there are 'Display' and 'Arrange' options. The main content area is titled 'Meeting notes' and shows a metadata table and a form. The metadata table has columns for 'Metadata form', 'Current version', 'Version date', 'Editor', and 'Comment'. The form has fields for 'Customer/project', 'Author', 'Meeting date', 'Place', 'Start', 'End', and 'Topic'. On the right side, there is a 'Create a post' section with a feed of updates, including 'Anderson saved a new working version of this document' and 'Anderson filed a new document'. The feed items show 'Version 2' and 'Version 1'.

Metadata form	Current version	Version date	Editor	Comment
Project file	2	Jun 2, 2020, 3:36 PM	Anderson	

Customer/project:	Author:	Meeting date:
XX	XX	XX
Place:	Start:	End:
XX	XX	XX

Topic: XX

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

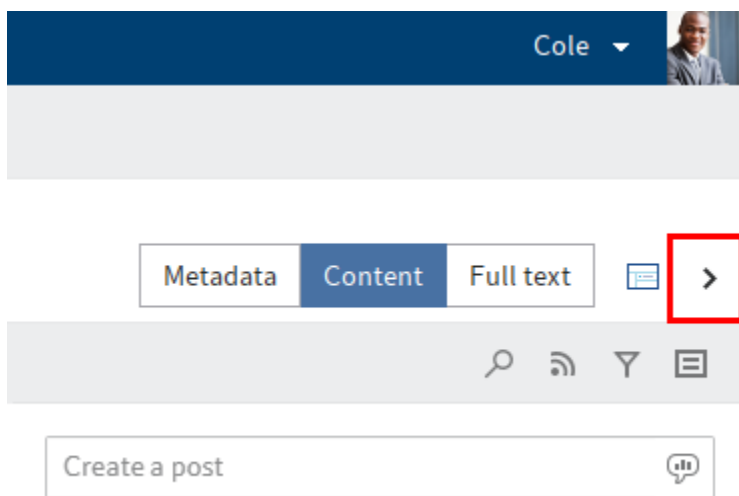
If the entry was stored with a gen. 2 metadata form, you can edit the entry directly in the viewer pane. Select the floppy disk icon to save the changes.

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.

Maximize/minimize viewer pane

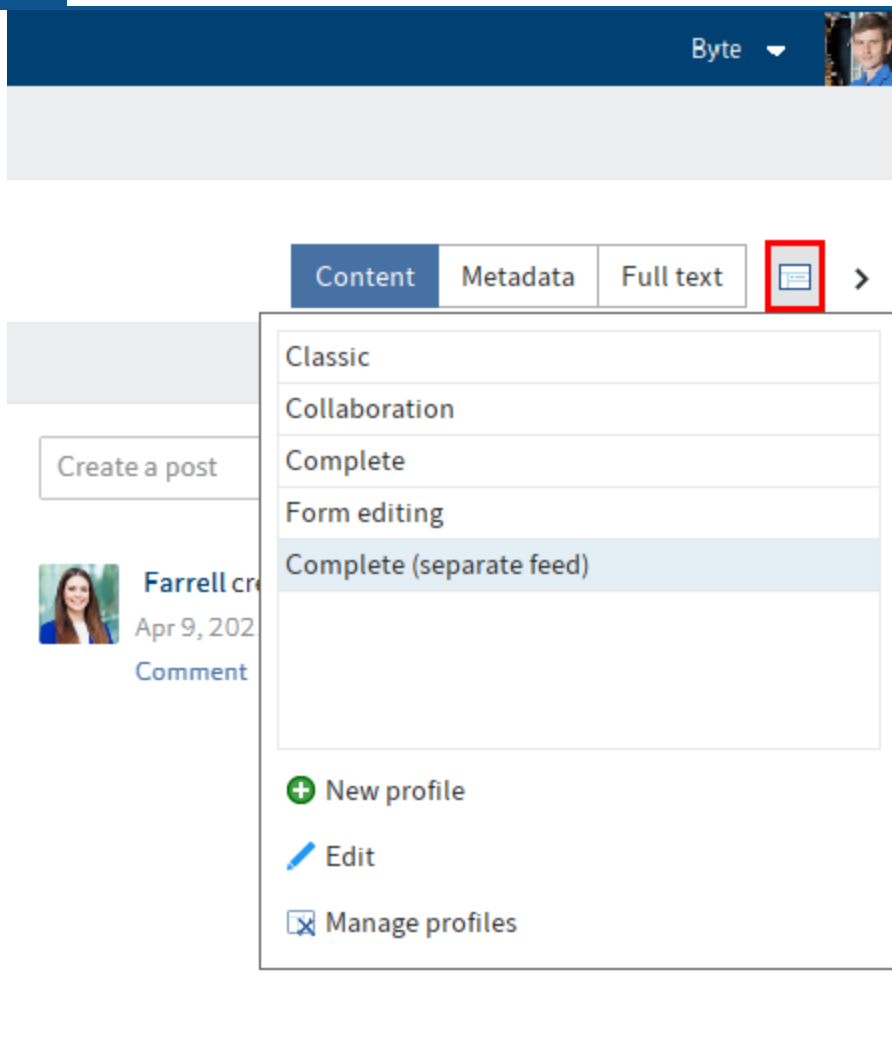
This function minimizes or maximizes the viewer pane.



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:

- Web application
- Full text
- Metadata/Form
- Feed
-

Content

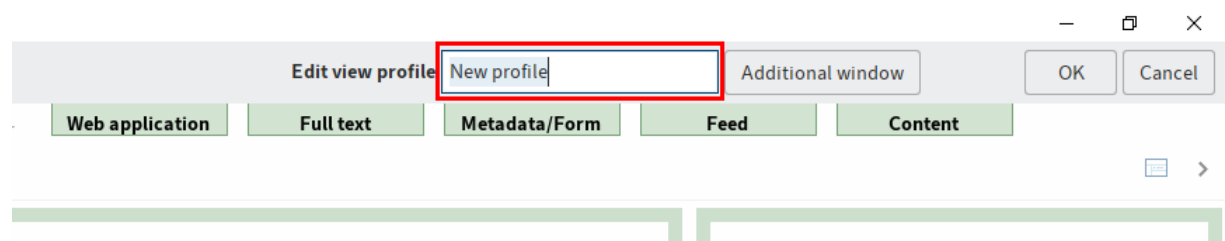
3. Drag a view element to any pane and release the mouse button.

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

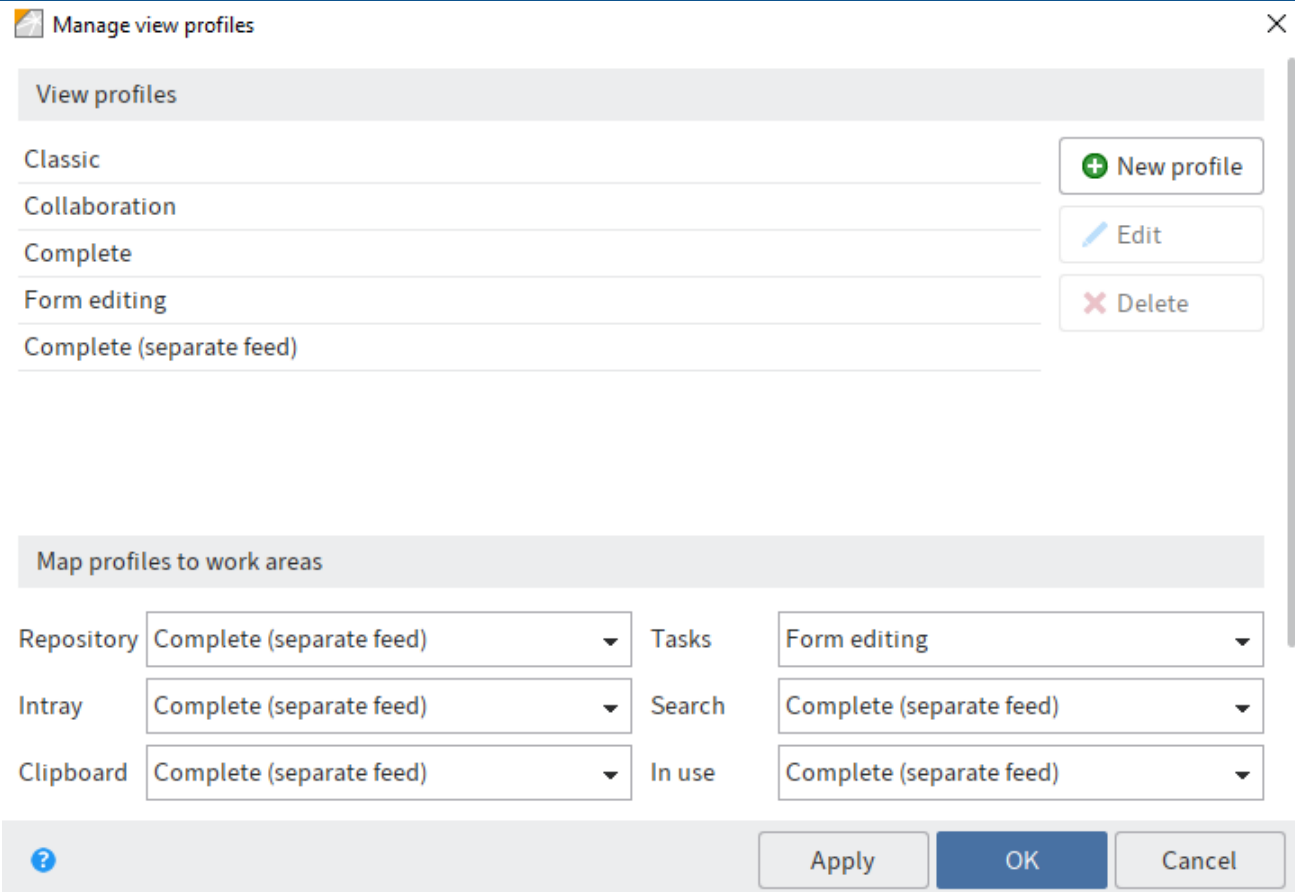
The settings you make in the *Preview* dialog box are not applied to the view profile.

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 chapter *Metadata*.


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 denoted with a green dot.


You can find the folder or document feed in the viewer pane.



Feed posts for different entries are listed in the *My ELO* work area. This can include feeds you have subscribed to or in which you have been mentioned. You will find additional functions in the *My ELO* feed. For more information, refer to the chapter 'My ELO' work area.

Jupiter ▾ 


Content Metadata Full text  >


   

Create a post 


 **Jupiter** 


@Farrell Please add contact data for the caterer
#companyparty
a minute ago
[Comment](#)

 **Byte** saved a new working version of this document.

 **Version 2**
New item in list

Aug 17, 2020, 3:11 PM
[Comment](#)

 **Anderson** filed a new document.

 **Version 1**

Aug 17, 2020, 2:58 PM
[Comment](#)

The following message types are shown in the feed:

- Posts (written by a user)
- Comment (on a post)
- Polls
-

Events (e. g. when a new version of a document is filed or changes are made to the working version)

You will recognize who created a feed post based on the name and profile picture. You can read how to edit your profile in the chapter Edit profile.

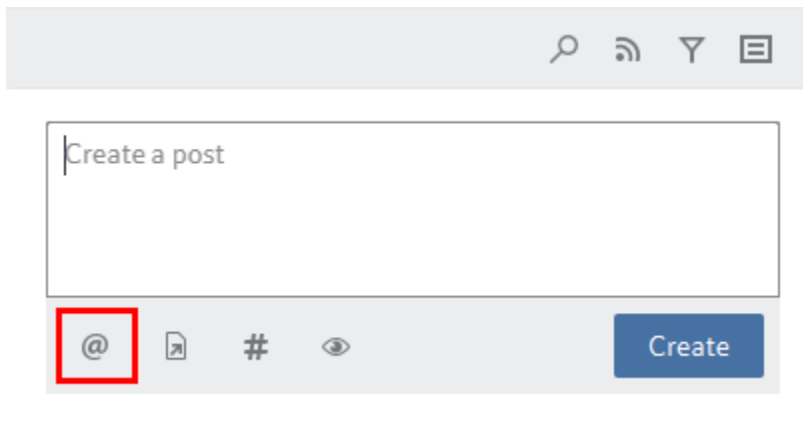
To view another user's profile, click on the profile image or the user name.

Create post/comment

The feed enables you to write posts related to entries in ELO and comment on posts uploaded by other users. Enter your post/comment in the respective input fields. With *Create*, you can upload the post/comment.

The icons below the input field provide you with additional tools for your post/comment. You have the following options:

Mention

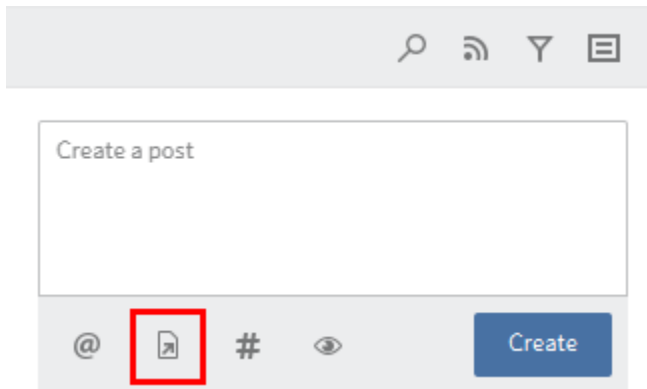


Use *Mentions* (@ symbol) to address a feed post to another ELO user or group. The users mentioned can see the corresponding feed post in their *My ELO* work area.

Alternative: As soon as you type an @, ELO automatically recognizes that you want to insert a mention. The *Mention* dialog box appears.

In the *Mention* dialog box, select one or more users or groups. If you select a group, a list of members appears. Double-click the corresponding user in the *Members of the group* column to select a member of a group. If you select the *Expand* button, groups are not displayed as a group. Instead, the individual members of the group are listed.

Reference

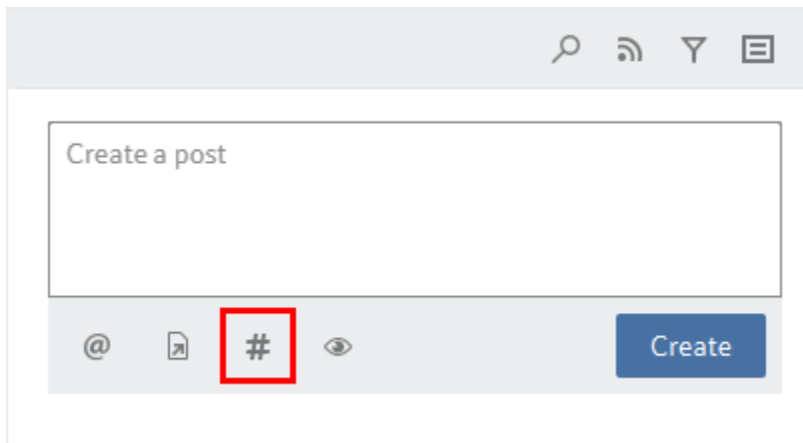


Use the *Reference* button (document icon with arrow) to link a feed post with an entry in ELO. Clicking the reference automatically takes the user to the filing location of the linked entry.

Alternative: As soon as you type a >, ELO automatically recognizes that you want to insert a reference. The *Reference* dialog box appears.

In the *Reference* dialog box, select the entry in the repository tree you want to reference.

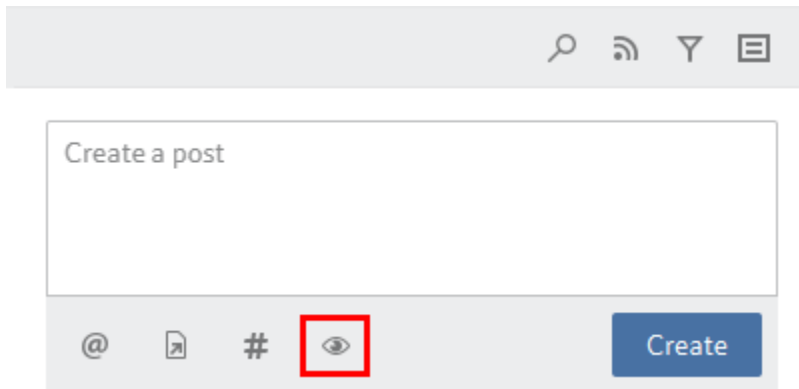
Hashtag



Use the *Hashtag* (# symbol) to add hashtags to a post. Users can subscribe to hashtags. You can also filter the *My ELO* work area by hashtags.

Alternative: As soon as you type a #, ELO automatically recognizes that you want to insert a hashtag.

Visibility



With *Visibility* (eye icon), you can restrict who can read your post. You can apply this restriction for future feed posts. Enable the *Remember selected visibility* option. Your visibility settings will be set as the default for new feed posts.

Information

You cannot change the visibility settings of a comment. The visibility settings of the post you are commenting on apply.

Format text as bold

Bold: To format a part of the text in bold type, place an asterisk (*) at the beginning and end of the desired text section.

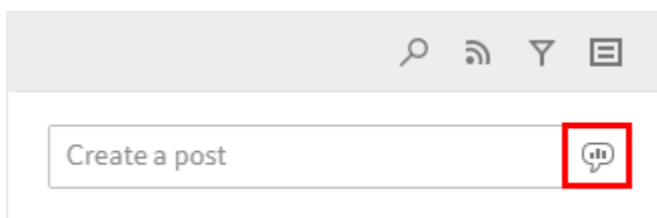
Example

I would like to emphasize this **again**. will appear in the ELO feed as follows: "I would like to emphasize this again."

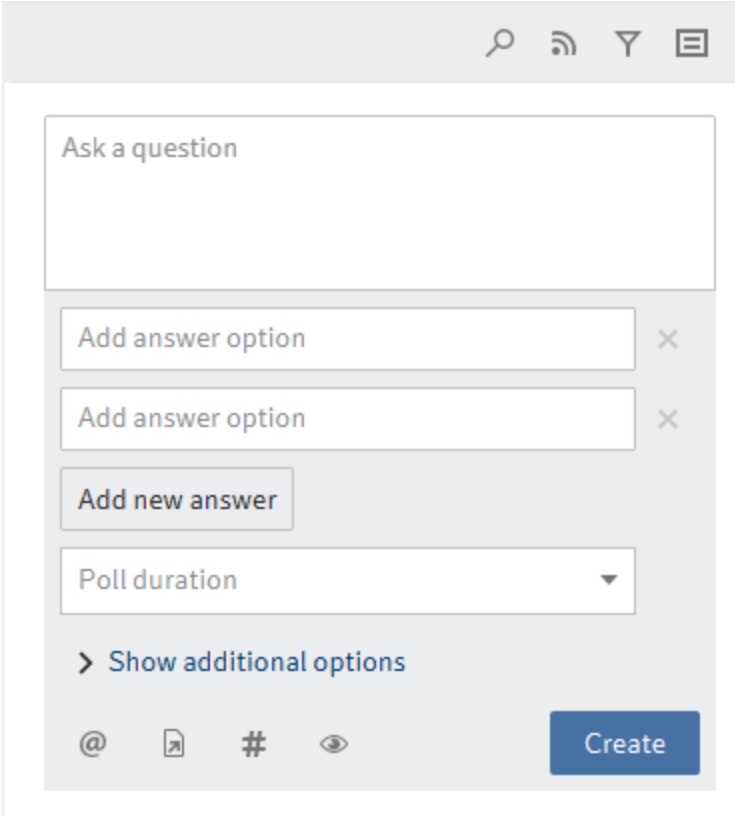
Information

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.

Poll



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



Poll duration: You can select how long you want the poll to remain open in the drop-down menu. You can 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

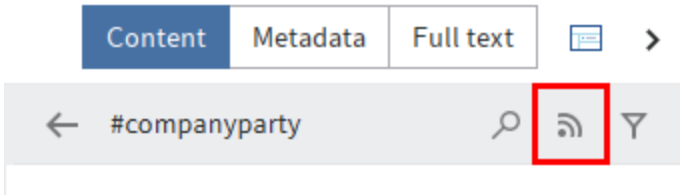
Select *Create* to start the poll.

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.

Subscribe to hashtag

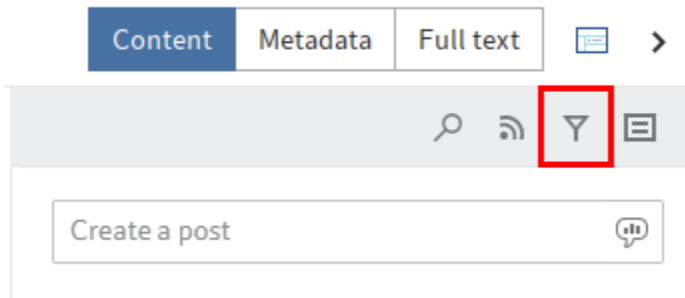
To be notified of new posts related to a specific topic, you can subscribe to hashtags.



Select the hashtag you want to follow. You will see an overview of posts with this hashtag. Select *Subscribe* (antenna icon) in the upper bar.

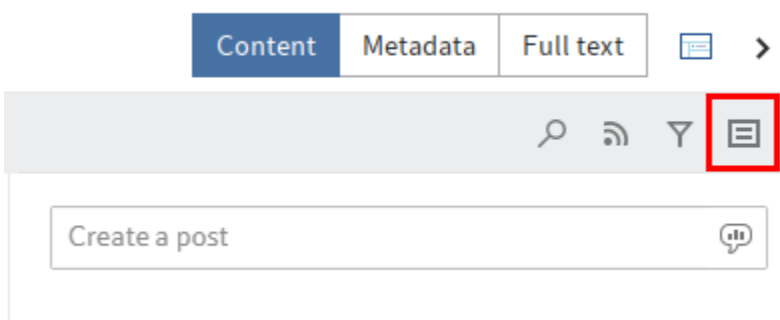
You have subscribed to the hashtag. All posts that are marked with the corresponding hashtag appear in the *My ELO* work area.

Show filter options



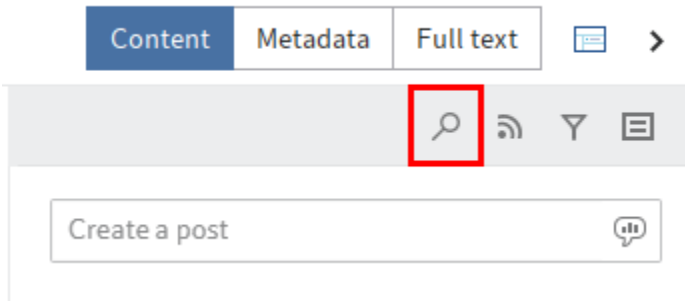
Show filter options (filter icon) opens a window with filters for the corresponding feed. You can use these filters to restrict the feed to posts that match the respective filter.

Show metadata



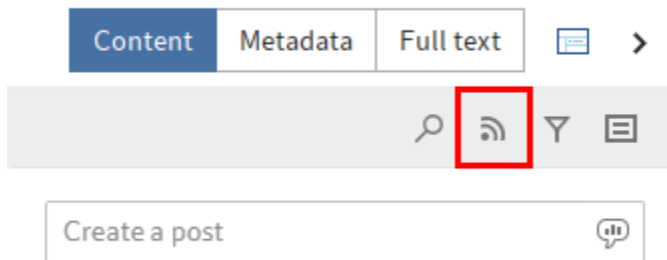
You can select the *Show metadata* button (document icon) to view the metadata of the entry. The metadata form associated with the entry is always displayed. The fields of the form are only displayed if they contain data. In gen, 2 metadata forms, only the form associated with the entry is displayed, even if you have completed other fields.

Search feed



Select *Search feed* (magnifying glass icon) to search within the currently selected feed. When the search term is found, the feed is narrowed down to the corresponding posts. The matches are highlighted. You can start the search with the magnifying glass icon. To reset the search and display the entire feed, select the X icon next to the selected search term.

Subscribe to feed



Select *Subscribe* (antenna icon) to subscribe to the feed. All feeds you have subscribed to are listed in the *My ELO* work area. Once a post is added to one of these feeds, you also see the post in the *My ELO* work area.

Automatically subscribe to feed

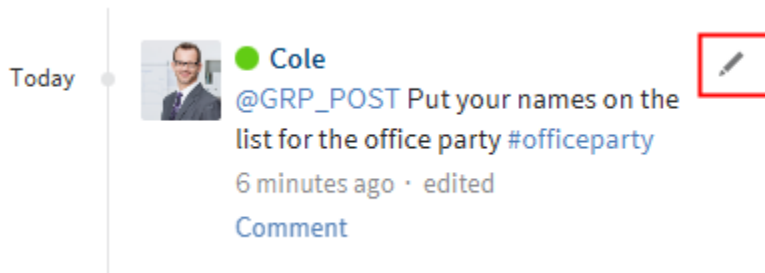
You can automatically subscribe to feeds. This applies to specific events that are triggered by a user:

- Filing a document
- Creating a folder
- Creating a new document version
- Creating a feed post or comment

You can enable the automatic feed subscription options in *My ELO > Settings > My ELO settings*.

Alternative: You can also enable the automatic feed subscription option under *Ribbon > User menu [your name] > Configuration > Advanced settings > My ELO*.

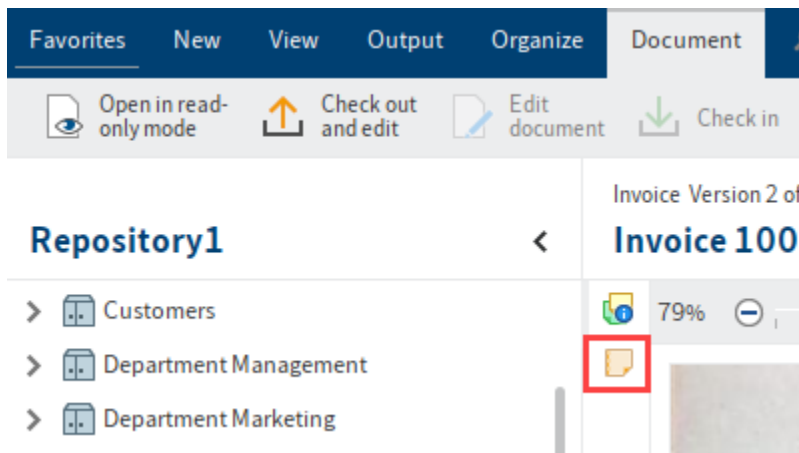
Edit post



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

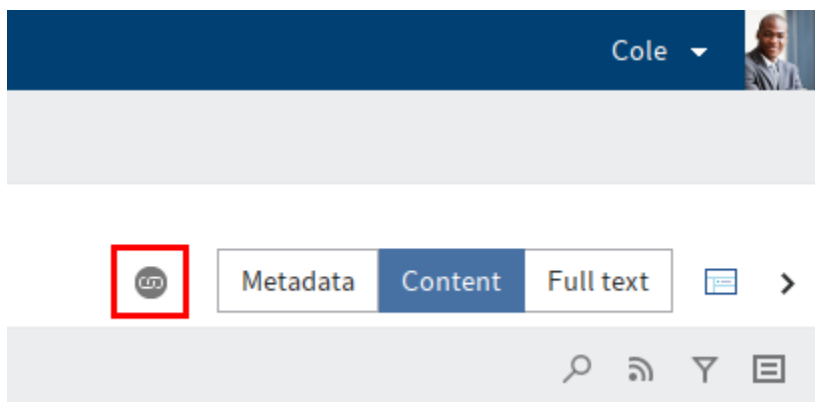
Margin notes, links, attachments

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



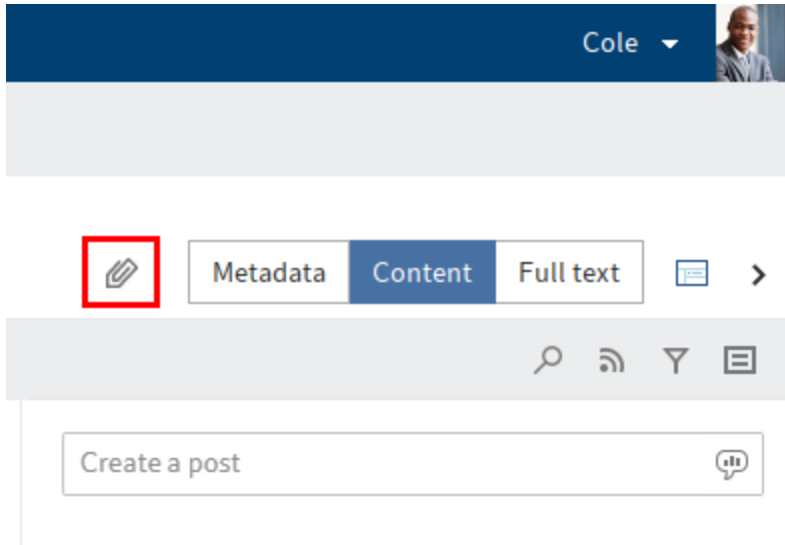
Margin notes: You will see margin notes for an entry on the split bar. Select the icon to open the margin note.

You can learn how to create a margin note in the chapters General margin note, Personal margin note, and Permanent 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.

Important actions in detail

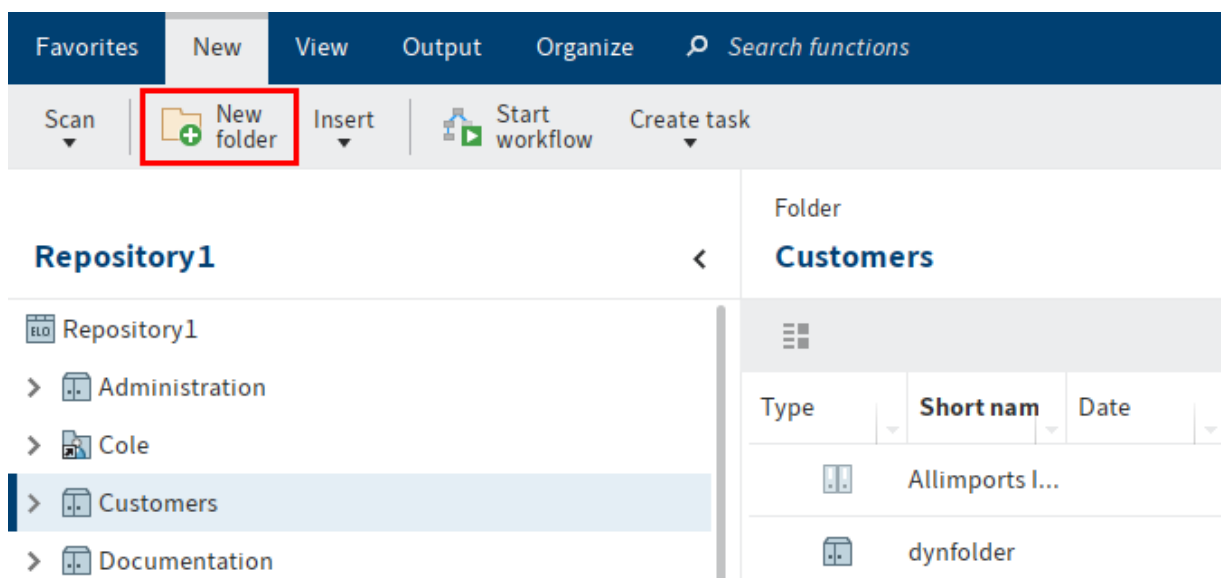
This chapter is especially helpful for getting started. It explains how to perform basic actions.

Create folders

You want to create a new folder in ELO.

Method

1. Open the *Repository* work area.
2. Select the folder in the repository that you want to create the new folder in.



3. Select *New folder* on the *New* tab.

The *Metadata for new folder* dialog box opens. The *Folder* form is selected by default.

Information

In the *Metadata for new folder* dialog box, you only see forms in the *Available forms* column that have been assigned the *Folders* usage option in the metadata form manager of the ELO Administration Console.

4. Enter the name of the new folder in the *Short name* field.

Information

The more detailed your entries are, the easier it will be for you to locate the folder.

5. Once you have entered the required information, select *OK*.

Result

A new folder is created.

Outlook

The folder can be used for filing documents or for creating additional child folders.

You can save an existing folder structure as a default index and insert it into other folders. A default index is used as a template and can be used as often as required. You will find more information here: [Save as default index](#).

Insert document

You have the following options for storing a document in ELO:

- Via drag-and-drop
- With the 'Insert file' function
- Scan it to the Intray and file it
- With the 'Document from template' function

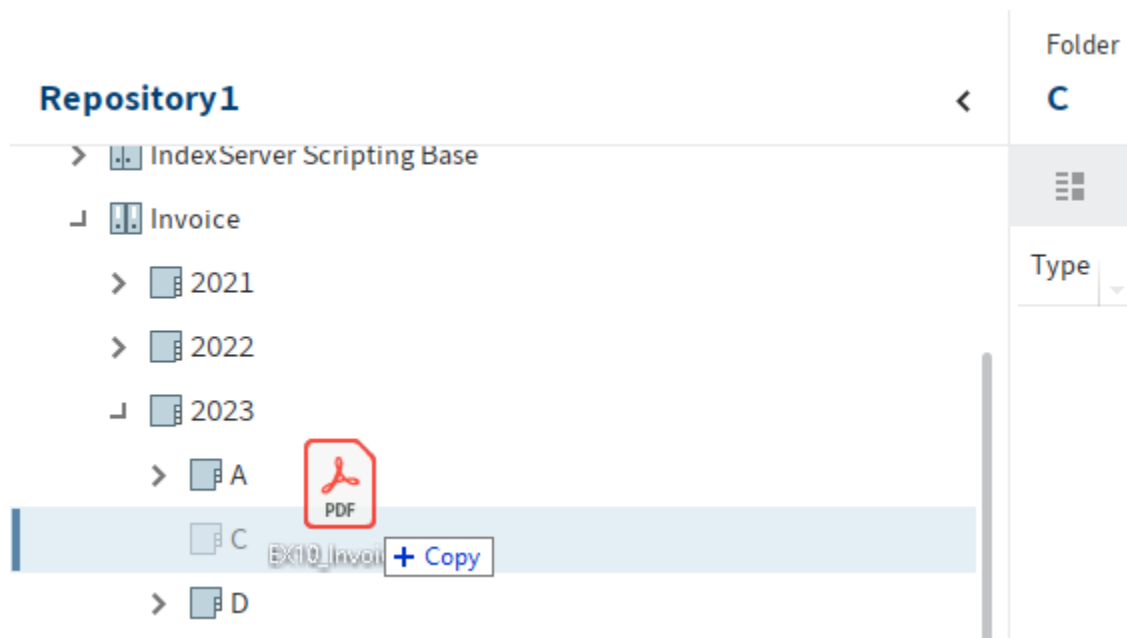
File a document with drag-and-drop

You want to drag and drop a document to ELO from Windows Explorer.

Method

1. Open the *Repository* work area in ELO.
2. Open Windows Explorer.
3. Click the document in Windows Explorer and drag it to the desired target folder.

Alternative: You can file multiple documents to ELO. Select the documents while holding SHIFT or CTRL in Windows Explorer and drag them to the desired target folder.



4. Release the mouse button.

The *Metadata for new document* dialog box opens.

5. Select a metadata form in the *Available forms* column.
6. Enter a short name.

Optional: Enter additional metadata.

Alternative: For multiple documents, you can enable the *Same metadata for all documents (serial filing)* option below the *Short name* field. Refer to chapter *Serial filing* for more information.

Information

The more precise the information is that you enter for a document, the easier it is to find the document later on. For detailed information on this topic, refer to the *Metadata* chapter.

7. Select *OK* once you have entered all metadata.

Result

You have filed the document to ELO.

Outlook

You can modify documents stored in ELO. If the document is version-controlled, a new version of the document is stored after you have made changes. The old version is retained. You have the following options:

- Check out and edit document
- Load new version

Store document with the 'Insert file' function

You want to transfer a document from your file system to ELO.

Method

1. In the *Repository* work area, select the folder that you want to insert the document into.
2. On the ribbon, select *New > Insert > Insert file*.
3. In the *Insert file* dialog box, select the desired file.

Alternative: You can file multiple files to ELO. Select the desired files while holding the SHIFT or CTRL key.

The screenshot shows the 'Metadata for new document' dialog box with the following details:

- Title:** Metadata for new document
- Tabs:** Available forms, Basic (selected), Extra text, Options, Permissions
- Fields:**
 - Short name: EX10_Invoice_Contelo_1056
 - Date: Nov 30, 2024
 - Filing date: (empty)
 - Current version: (empty)
 - Editor: Administrator
- Footer:** ? icon, file icons, Expand keyword list automatically ⓘ, Apply and next, OK, Cancel

The *Metadata for new document* dialog box opens.

4.

Select a metadata form in the *Available forms* column.

5. Enter a short name.

Optional: Enter additional metadata.

Alternative: For multiple files, you can enable the *Same metadata for all documents (serial filing)* option below the *Short name* field. Refer to chapter Serial filing for more information.

Information

The more precise the information is that you enter for a document, the easier it is to find the document later on. For detailed information on this topic, refer to the Metadata chapter.

6. Select *OK* once you have entered all metadata.

Result

You have filed the document to ELO.

Outlook

You can modify documents stored in ELO. If the document is version-controlled, a new version of the document is stored after you have made changes. The old version is retained. You have the following options:

- Check out and edit document
- Load new version

Scan a document to the Intray and file it

You want to scan a document and file it to ELO.

Requirements

- A scanner needs to be connected to the computer.

Please note

If you are using the 64-bit version of ELO, you will need to use the ELOscanTool for scanning. You will find this setting under *Ribbon > User menu [your name] > Configuration > Technical presets > General > Use as scan method > ELOscanTool TWAIN (Windows)*.

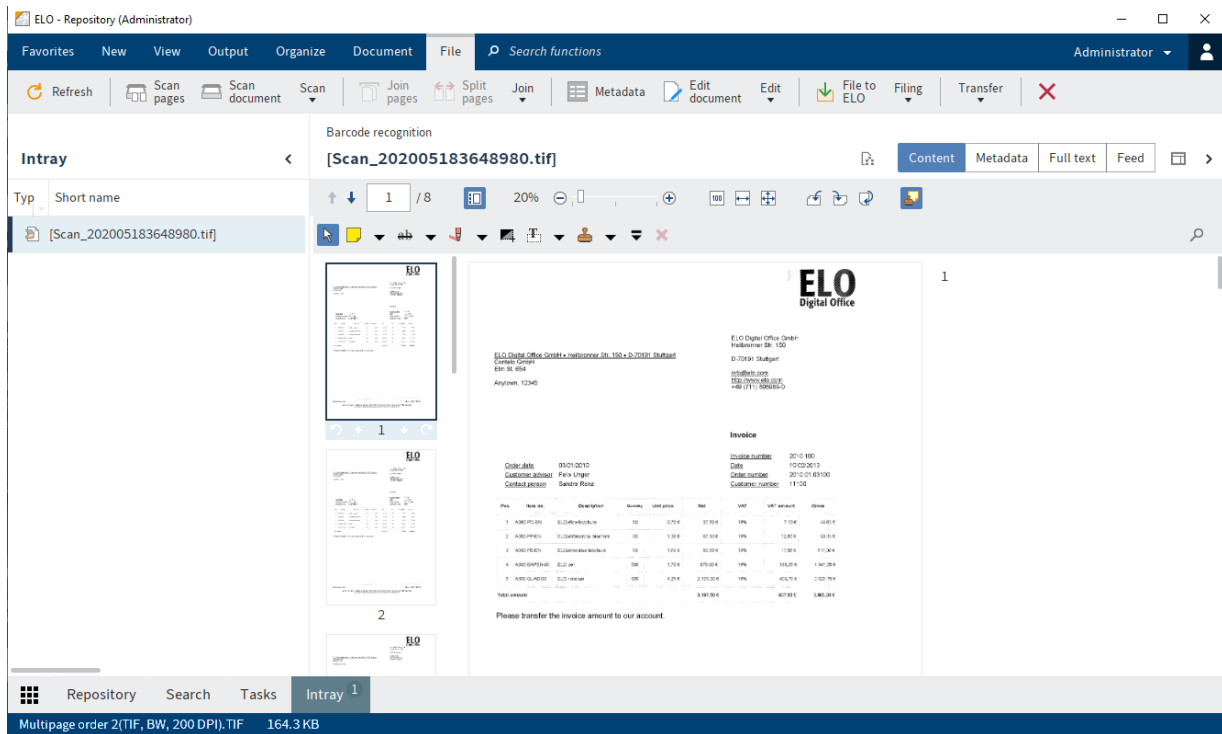
Method

1. Open the *Intray* work area.
2. Place the document in the scanner.
- 3.

Select the *Scan document* button on the *File* tab to start the scan process.

Optional: A dialog box may appear. Make the desired settings and select *Scan*.

The scan is performed.

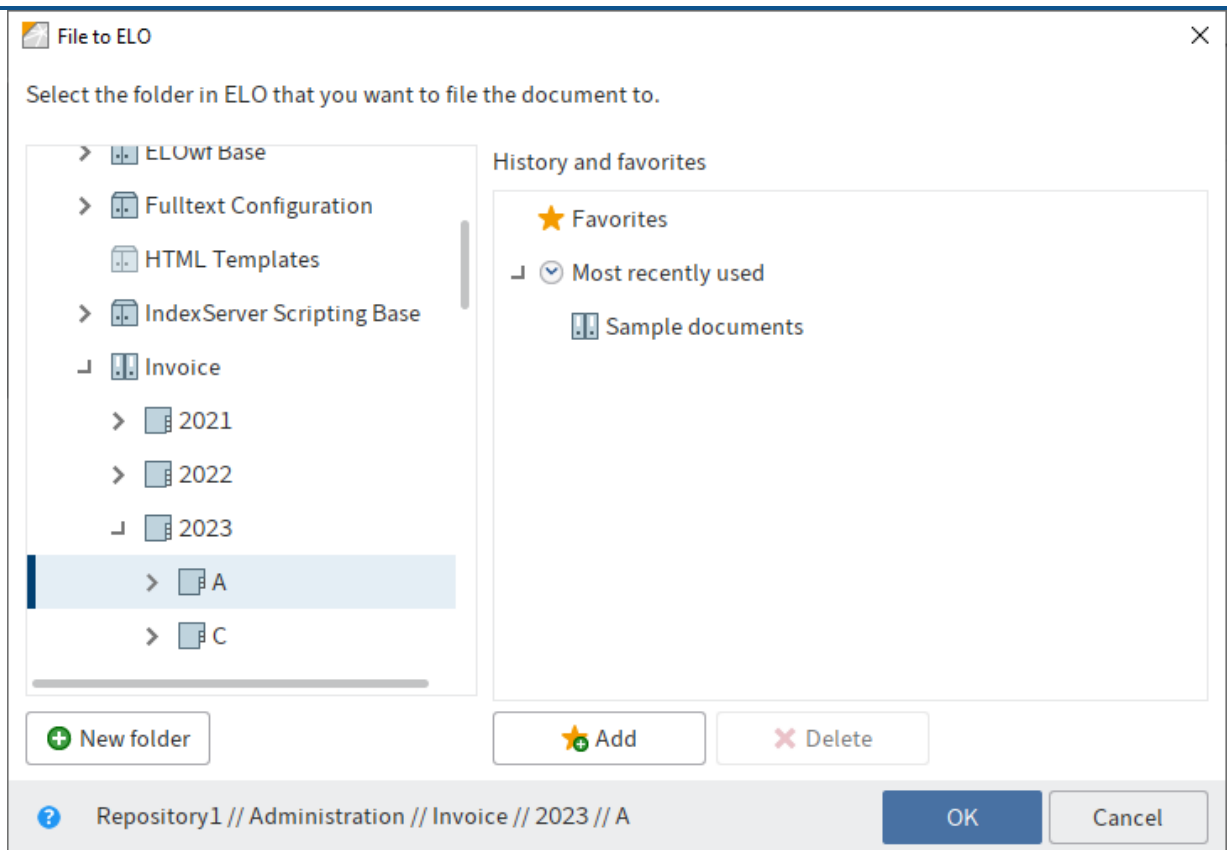


The scanned document appears in the viewer pane.

File document

Follow these steps to file the scanned document to ELO.

1. Select the scanned document in the *Intray* work area.
2. On the *File* tab, select *File to ELO*.



The *File to ELO* dialog box opens.

3. Select the folder where the scanned document should be filed.
4. Select *OK*.

Metadata for new document

Available forms < Basic Extra text Options Permissions

Filter [Refresh]

Short name Scan_20230808578505

Date Nov 30, 2024

Filing date

Current version

Editor Administrator

Basic entry

Expand keyword list automatically

Apply and next OK Cancel

The *Metadata for new document* dialog box opens.

5. Select a metadata form in the *Available forms* column.
6. Enter a short name.

Optional: Enter additional metadata.

Information

The more precise the information is that you enter for a document, the easier it is to find the document later on. For detailed information on this topic, refer to the *Metadata* chapter.

7. Select *OK* once you have entered all metadata.

Result

You have filed the document to ELO.

Outlook

You will find more information about the functions on the *File* tab in the 'File' tab chapter.

You can modify documents stored in ELO. If the document is version-controlled, a new version of the document is stored after you have made changes. The old version is retained. You have the following options:

- Check out and edit document
- Load new version

Store document with the 'Document from template' function

You want to create a new document with the help of a document template.

Requirements

- Templates must be created in an application such as Microsoft Word.
- There must be a document template in ELO, e. g. for Microsoft Word documents.
- You must know the name of the folder in ELO containing the document templates.
- You must know where you want to store the document in ELO.

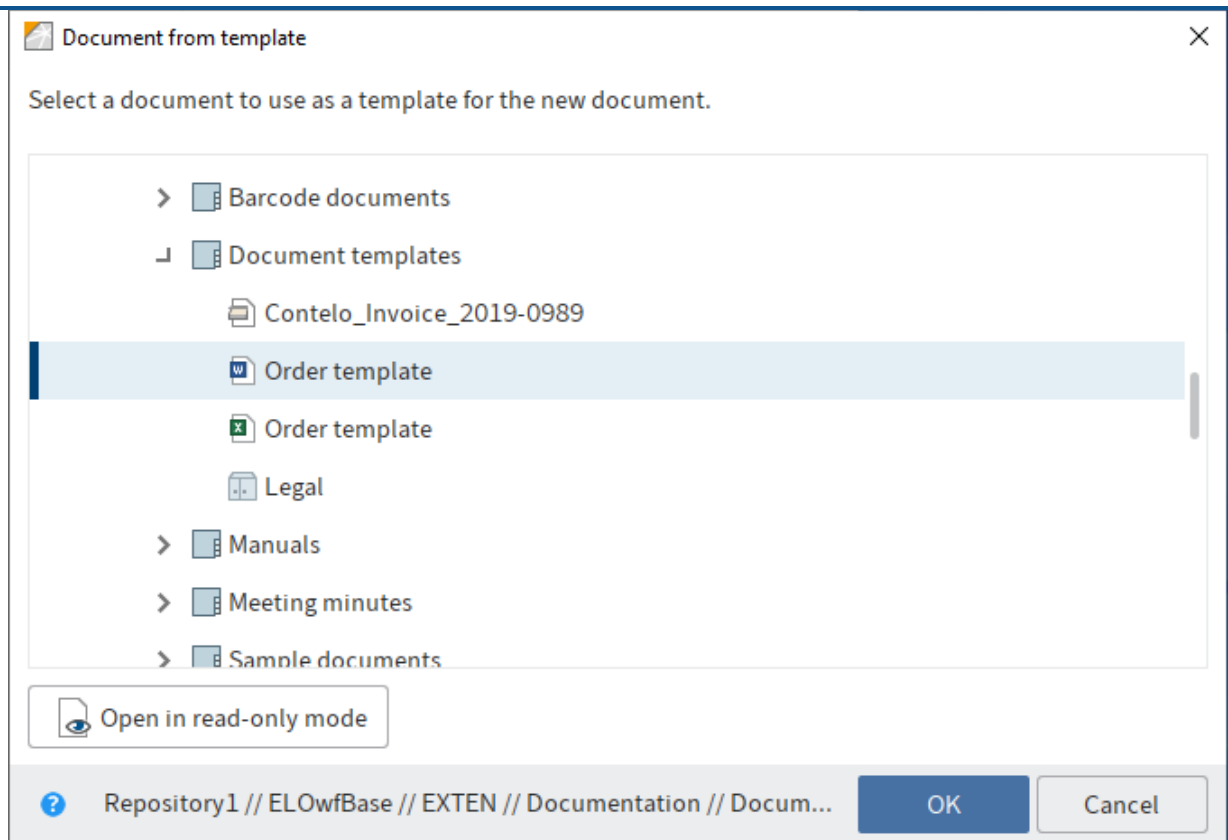
Information

Assuming you have the corresponding permissions, you can define a central folder for templates in ELO. You will find this setting under *Ribbon > User menu {your name} > Configuration > Technical presets > Folder for document templates*.

Method

1. Open the *Repository* work area.
2. Select the folder in the tree structure that you want to file the document to.
3. On the ribbon, select *New > Insert > Document from template*.

Keyboard shortcut: CTRL + N



The *Document from template* dialog box opens.

4. Open the folder with the document templates and select the appropriate template.
5. Select *OK*.

The *Metadata for new document* dialog box opens.

6. Select a metadata form in the *Available forms* column.
7. Enter a short name.

Optional: Enter additional metadata.

Information

The more precise the information is that you enter for a document, the easier it is to find the document later on. For detailed information on this topic, refer to the *Metadata* chapter.

8. Select *OK* once you have entered all metadata.

The dialog box closes. The corresponding external application will start and the document template will be displayed.

9. Make the desired changes.
10. Save the document and close the external application.

The document is now located in the designated folder in ELO.

- 11.

Select the document in ELO.

12. On the ribbon, select *Document > Check in*.

Keyboard shortcut: ALT + I

The *Version information* dialog may appear. If so, enter a version number and a version comment.

Result

You have filed the new document to ELO.

Outlook

You can modify documents stored in ELO. If the document is version-controlled, a new version of the document is stored after you have made changes. The old version is retained. You have the following options:

- Check out and edit document
- Load new version

Edit entry

You can edit the content of documents in ELO. To do so, you must check out the document, and check it back into ELO when you have finished working on it. You can Check out and edit a single document or an entire folder. When an entry is checked out (folder or document), it is locked and cannot be edited by other users.

Check out and edit document

You want to edit a document and file the new version to ELO.

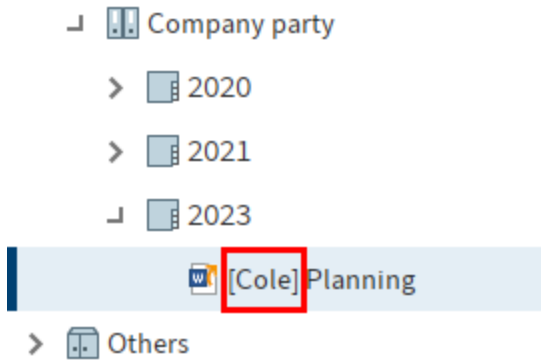
Method

1. Open the *Repository* work area.
2. Select the document you want to edit.

The preview of the document is displayed in the viewer pane.

3. On the ribbon, select *Document > Check out and edit*.

Keyboard shortcut: ALT + O



The document is opened in the corresponding application and can be edited.

In ELO, the name of the user who currently has the entry checked out is shown in square brackets before the document name. The document cannot be edited by other users as long as it is checked out.

4. Edit the document in the external application.
5. Save the document in the external application.
6. Close the external application.

Information

You can file the edited document to ELO via the *Repository* work area or the *In use* work area. Select the *Check in* function on the *Document* tab.

7. Select the document in ELO.
8. Select the *Check in* function on the *Document* tab to transfer the document back to ELO.

Keyboard shortcut: ALT + I

Alternative: Right-click a document in the repository and select *Check in* from the context menu.

Information

If you do not change a document and select the *Check in* function, the *Check in document* dialog opens. In this dialog box, you can cancel editing or file the document as a new version anyway.

The *Version information* dialog box appears.

Optional: Enter a version number and version comment.

If you want to update the document date in ELO to the current date, select the *Apply the current date* option. The document date is the date that is saved along with the document version. In contrast, the filing date is the date on which a document was filed to ELO.

Users with the appropriate permissions can delete versions of a version-controlled document. If you do not want your version to be deleted, select the *Non-deletable version* option.

9. Select *OK*.

Result

The document is checked back into the *Repository* work area with a new version number.

Related functions

- Load new version: With this function, you can also load a new version without checking out and editing the current version of a document filed to ELO.
- Check out to OneDrive: 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.

Check out and edit folder

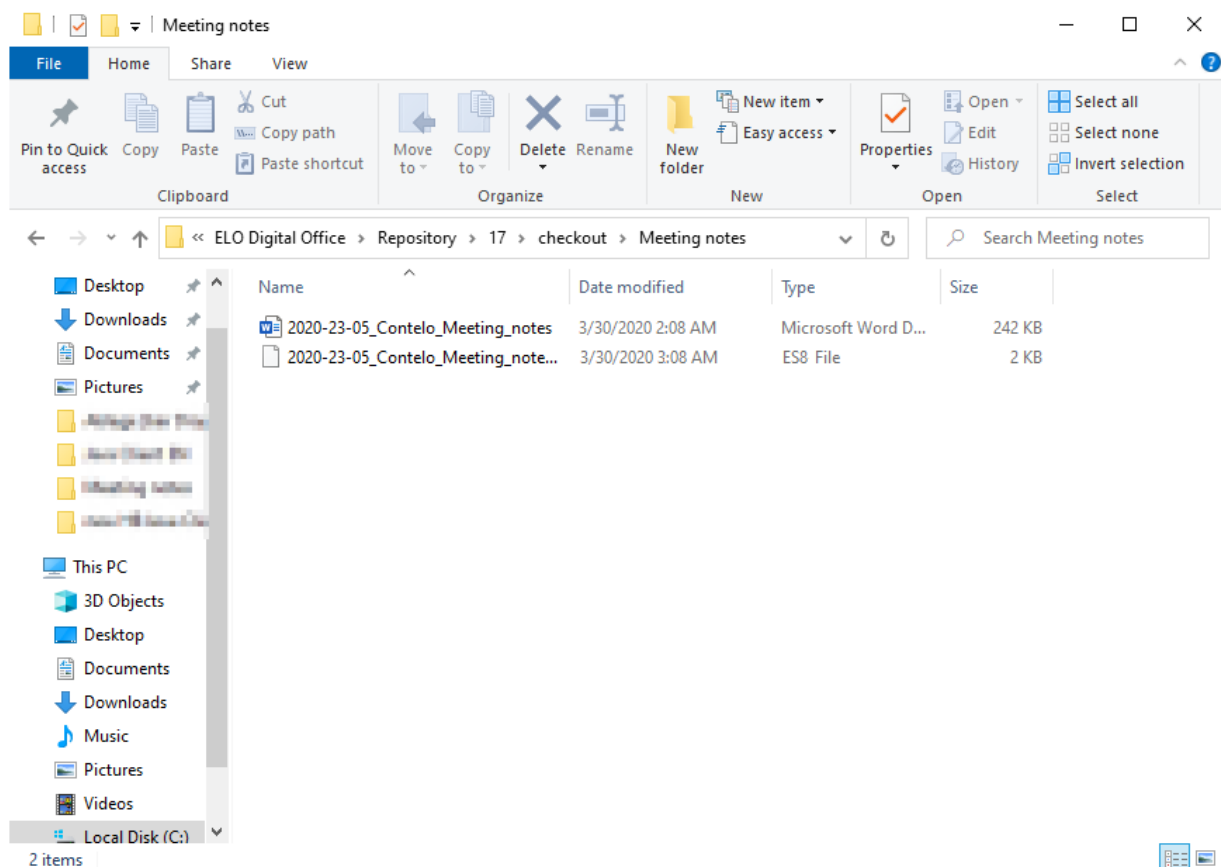
ELO also lets you check out entire folders and edit their contents. This allows you to lock multiple documents at once.

Please note

If you check out a folder with all the references, you cannot check in the references separately. Instead, you need to check in the entire folder. In addition, you cannot check in the original documents that are linked to the references until you have checked in the entire folder.

Method

1. Open the *Repository* work area.
2. Select the folder you want to check out.
3. Right-click the folder to open the context menu.
4. In the context menu, select the *Check out and edit* function.



The folder is temporarily stored in a checkout directory on your file system. You can open and edit the individual documents from here.

Information

Child folders are not checked out. A file in ES8 format is created for each document. Files in ES8 format are used for saving metadata. The Windows Explorer default settings hide ES8 files.

The entire folder appears as checked out in the *In use* work area.

Check in

When you have finished editing the documents, you can check the folder back into ELO.

5. Select the checked out folder in ELO.
6. Right-click the folder to open the context menu.
7. Choose the *Check in* function in the context menu.

During check-in, ELO recognizes which documents have been changed. With the default settings, the *Version information* dialog box appears for every changed document.

Result

The folder was checked in. The changed documents were filed as new versions.

Start workflow

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

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

The following options are available for starting workflows:

- *Start ad hoc workflow* function
- *Start workflow* function

Ad hoc workflows are simple, predefined workflows available in ELO. The workflows available to you when you run the *Start workflow* function were defined by your company.

You can learn how to start an ad hoc workflow in the chapter Ad hoc workflow.

Method

1. Select the entry (folder or document) you want to start a workflow for.
2. On the *New* tab, select the *Start workflow* function.

Start workflow

Select a template and modify the workflow name if required. Click OK to start the workflow.

Templates

- Leave Request
- Material orders
- Newsletter
- Order

Show template

Workflow name: Material orders

OK Cancel

3. Select a workflow template.

Show template: You can see the individual steps of the workflow here. As the workflow is already configured, you do not have to configure any additional settings.

Information

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

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

Outlook

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

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

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

Forward workflow

When you receive a workflow task, it will appear in your *Tasks* work area. You can see what task you are being requested to perform in the workflow step field.

To complete your task, forward the workflow.


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

- You received the workflow as a member of a group. In this case, you have to accept it first by selecting the *Accept workflow* button on the *Task* tab. This prevents the workflow from being processed by multiple users at once. Once you have accepted a workflow, it will disappear from the task list of the other group members.
- The workflow contains a form. You will see the form in the viewer pane on the *Form* tab. In this case, forward the workflow as described further below by selecting the button on the form.


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

Method without a form

1. Select the workflow that you want to forward.
2. On the *Task* tab, select the *Forward workflow* function.

 Forward workflow ×


Finish editing the current node

Information on the current node	Workflow step	<input type="text" value="First check"/>
	Comments 	<div style="border: 1px solid #ccc; height: 60px;"></div>

Forward

Select the next workflow step:

[→ End node](#)



You can make the following settings:

Workflow step: Enter the name of the workflow node here.

Comments: Enter a message or instructions for the next user here.

Please note

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

- As soon as you click the name of the successor node, the node is forwarded and the dialog box closes.

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

Method with a form

If you receive a workflow you have to forward via a form, the *Forward workflow* button is not active. You will see the form in the viewer pane on the *Form* tab.

The screenshot displays the ELO Java Client interface for a workflow node. The main area shows a form for 'Offer_EX10 node 3'. The form includes the following fields and controls:

- Article number:** 2344559777744
- Article name:** Pen
- Pieces:** 10
- Unit price:** 0,49
- Subtotal:** 4,90
- Total:** 4,90
- Next processing step:** A section highlighted with a red box containing a 'Finish process' button.
- Save without passing forward:** A section containing 'Save' and 'Print' buttons.

The interface also features a navigation menu on the left with options like 'AddNoteConfirmFlo', 'Order', and 'Invoice'. The top navigation bar includes 'Task', 'Document', and 'Search functions'. The right sidebar shows a 'Form' tab, a search bar, and a notification: 'Administrator filed a new document.' The bottom right corner displays the date and time: 'Aug 17, 2021, 9:46 AM' and a 'Comment' field.

- Edit the fields of the form as indicated in the task.
- To forward the workflow, select the corresponding button within the form.

Create tile

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

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

You can create two types of views:

- Folder view: A folder view takes you straight to a frequently used folder.
-

Task view: A task view shows you tasks with criteria you selected (e. g. tasks with expired deadlines).

Information

Like views, search favorites are displayed as tiles on your *My ELO* home screen. You will find more information about search favorites in the: Save search chapter.

Create folder view

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

Method

1. In the *Repository* work area, select the folder you want to create a view for.
2. On the ribbon, go to the *View* tab and select *New view*.

Keyboard shortcut: ALT + N

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

In the *Folder* area, the folder that you just selected in the *Repository* work area is already selected. You can select a different folder if you want to.

3. Select *OK*.

Result

A tile is created for the new view under the *Repository* group in the tile navigation.

Outlook

You can drag and drop a tile to another position.

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

For more information, refer to the Tile navigation chapter.

If you have created multiple views, you have the option to group them. To learn how to create a group in the tile navigation, refer to the chapter Create group.

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

Create task view

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

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

Please note

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

Method

1. Navigate to the *Tasks* work area.
2. On the ribbon, go to the *View* tab and select *New view*.

Keyboard shortcut: ALT + N

New task view [X]

Name of the task view ⓘ

Name

Criteria

Define the criteria for sorting tasks in this task view. ⓘ

Type

Priority

Status

Name

Workflow step

Editor

Owner

Metadata form

Fields ⓘ Link rows with and or

[?]

3. In the *New task view* dialog box, define the criteria for showing tasks in the task view.

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

You can set the following criteria:

o

Type: You can select the type of tasks that should be filtered for here. If no task type is selected, all tasks are displayed.

- Priority: Use the Priority drop-down menu to specify the priority according to which you want to filter the tasks. Only tasks with the selected priority are displayed. If no priority is selected, all tasks are displayed.
- Status/Name/Workflow step: Use the drop-down menu and the input field to define which criteria the status, name, or workflow step of the tasks must meet for the corresponding tasks to be displayed.

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

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

- Editor: Select an editor of the tasks. Suggestions will appear as soon as you start to type. The task view only contains tasks assigned to the selected editor.
- Owner: Select an owner of the tasks. Suggestions will appear as soon as you start to type. The task view only contains tasks assigned to the selected owner. The owner is the user who started the workflow.
- Metadata form: Use the Metadata form drop-down menu to select a metadata form if you only want tasks with the corresponding metadata form to be displayed in the task view.
- Fields: If you have selected a metadata form, you can use the plus sign to add fields so that you can filter by their contents.

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

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

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

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

4. Select *OK*.

Result

A tile is created for the new view under the *Tasks* group in the tile navigation.

Outlook

You can drag and drop a tile to another position.

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

For more information, refer to the Tile navigation chapter.

If you have created multiple views, you have the option to group them. To learn how to create a group in the tile navigation, refer to the chapter Create group.

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

You will find more information on the *Tasks* work area in the 'Tasks' work area chapter.

Search entries

You can search for entries (folders or documents) in ELO.

There are different ways to find documents in ELO. You can either use ELO iSearch or the metadata search.

Input

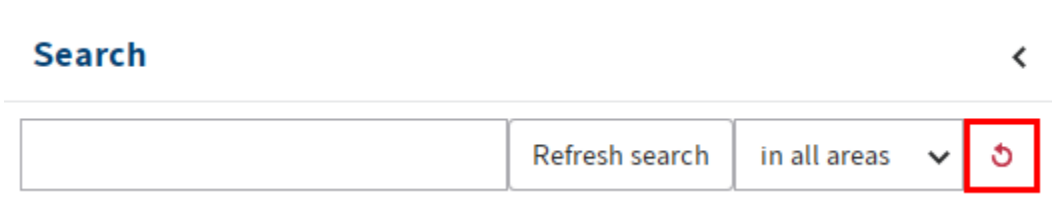
Enter one or more search terms into the input field.

Matching search terms are suggested as you type. To accept a suggestion, double-click on the term.

Information

You will find tips for entering search terms by selecting *more* under the input field.

Select *Start search* to search for the term.



The screenshot shows a search interface with a search bar containing the word "Search". To the right of the search bar is a left-pointing arrow. Below the search bar is a row of controls: an empty input field, a "Refresh search" button, a dropdown menu currently set to "in all areas", and a circular refresh icon (a square with a circular arrow) which is highlighted with a red square.

Reset search: You can restore the search default with this button.

Narrow down search

The following options are available for narrowing down your search:

- Areas
- Folders
- Filters

Narrow down areas

You can limit your search to specific areas.

Do this by selecting *in all areas* and choosing the areas.

If you have selected multiple areas, the search behaves as follows:

One search term:

- If you enter one search term, entries containing the search term in one of the areas are shown.

Multiple search terms:

- AND search: With an AND search (entering terms without a connecting element, e. g. dog cat), all entries that contain all search terms in one of the searched areas are shown.
- OR search: With an OR search (entering terms with a comma, e. g. dog, cat), all entries that contain at least one search term in one of the searched areas are shown.

Information

For technical reasons and to improve ELO iSearch performance, these areas cannot be searched in combination in the AND search.

Example

You search for two terms in different areas: One of the terms is in the full text of a document, and the other is in the short name. ELO iSearch does not return any matches. In this case, it only lists results that include all search terms in the same area.

If you search for just one of the terms and restrict the search using filters, you will get better results.

Narrow down folders

You can narrow down the search to a single folder.

Information

For technical reasons, this option may cause the search results to take a long time to load.

1. In the *Repository* work area, select the folder you want to search.
2. Switch to the *Search* work area.
3. On the ribbon, select *Search > Search logic > Current folder only*.
4. Make additional settings as required.

You need to select *Start search* again for the restrictions for a previously performed search to take effect. If you select the *Current folder only* option, the searched folder is displayed in a tooltip.

Filters

You can narrow down the search using filters: *Ribbon > Search > Filters*. After you have selected the filter, specify the filter via the drop-down menu.

For detailed information on using filters, refer to the chapter *Filters*.

Display search results

In the *Search* work area, you can use the same functions on entries as in the *Repository* work area, for example edit documents, create tasks, or send entries.

To go to the filing location of the selected entry, select *View > Go to* on the ribbon.

The search results are shown in multiple columns when the default settings are used. The table columns correspond to the fields of the metadata forms. The results can be filtered within the columns. By clicking the column headers, the results can be sorted in ascending or descending order.

Context menu

The screenshot displays the ELO Java Client search interface. At the top, there is a navigation bar with tabs: Favorites, New, View, Output, Organize, Search, and Search functions. Below this is a search bar containing the text "contelo". To the right of the search bar are buttons for "Refresh search", "in all areas" (with a dropdown arrow), and a refresh icon. Below the search bar are filters for "Entry type", "Date", "Filed by", and "Metadata form". A suggestion "Did you mean... content" is shown below the filters. The main area displays a table of search results with columns: Type, Short nam, Date, Result, and Releva. A context menu is open over the "Date" column header, listing the following options with checkboxes: Type (checked), Link (unchecked), Short name (checked), Date (checked), Results text (checked), Relevance (checked), Filed by (checked), Version (checked), Metadata form (checked), and Filing date (checked). The table shows 8 results, with the first one highlighted. At the bottom, there is a pagination bar showing "Results 1 to 8 of 8".

Right-click a column header to open a context menu. Select the columns that you want to display.

Numeric values

Filing date	Invoice number	Link	Results text	Invoice amount	Customer	Invoice date	Con
Mar 12, 201...	2,010.10		12345+49 (71	0,005,00	Customer	Feb 18, 201	
Feb 20, 201...	2,010,200.00						
Feb 20, 201...	2,010,300.00						
Feb 20, 201...	2,010,100.00						
Feb 20, 201...	849.00						
Feb 20, 201...	100,052.00						
Mar 9, 2016,...	221,212,121,200.00		0Anytown, 12:				

Column Invoice amount

Sum: 19,211.53

Minimum: 50

Maximum: 6,098

Open in read-only mode Ctrl-O

Go to

Metadata F4

Check out and edit Alt-O

Delete Ctrl-Delete

Additional references ▶

of 10

kammer 2

ELO provides the following additional information in the context menu for columns that only contains numeric values.

- Sum: Calculates the column sum.
- Minimum: Returns the lowest value in a column.
- Maximum: Returns the highest value in a column.

Filters

You can apply filters to the columns of the search results.

Metadata form	Filing date	Customer	Invoice number	Link	Results text
Invoice	Feb 20, 201...	all	2,010,200.00		
Invoice	Feb 20, 201...	empty	2,010,300.00		
Invoice	Feb 20, 201...	not empty	2,010,100.00		
Invoice	Feb 20, 201...	Custom...			
Invoice	Feb 20, 201...	Contelo Gmb	2,010,100.00		
Invoice	Feb 20, 201...		849.00		
Invoice	Feb 20, 201...		100,052.00		
Invoice	Mar 9, 2016,...		123,456.00		
Invoice	Mar 12, 201...	Contelo Gm...	2,010.10		12345+49

You can access the filters via the arrow icon next to the column label.

Highlighted full text matches

Matches are highlighted in the full text preview. Switch to the *Full text* option in the viewer pane.

The screenshot shows the ELO Java Client interface. The search results table is as follows:

Type	Short name	Date
[Byte]	EX10_2020-04-24-Book-Meeting minutes	Mar 17, 2018, 10:01
[Byte]	EX10_2021_Invoice_Contelo	Mar 17, 2018, 10:01

The full text preview for the selected document 'EX10_Invoice_Contelo_0753' shows the following content:

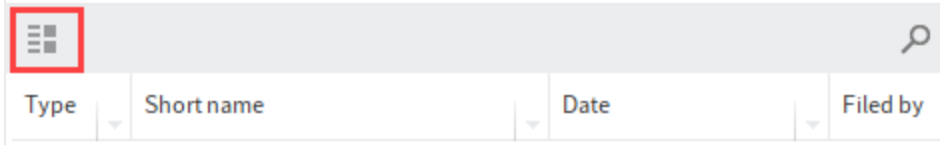
Version 1 of Jul 25, 2018 Administrator
EX10 Inc.
 10 Seacrest Drive
 Charter Oak, CA 91724
EX10 Inc. » 10 Seacrest Drive » Charter Oak, CA 91724
 Altustrics Inc.
 600 Outremer St.
 Riverport, CA 99834
 contact@ex.ten
 http://www.exten.ten
 +1(710)101010

If the document contains more than one match, you can jump back and forth between the matches in the full text using the *Show next hit* (arrow pointing downwards) and *Show previous hit* (arrow pointing upwards) buttons.

You can also display the hits in the *Results text* table column. Enable the *Results text* option under *Ribbon > User menu [your name] > Configuration > Display > Search*.

Display mode for search results

With the default settings, the search results are displayed as a list. You can also view search results as a tile, table, or tree structure. You can access the settings via *Toolbar > Display options*.

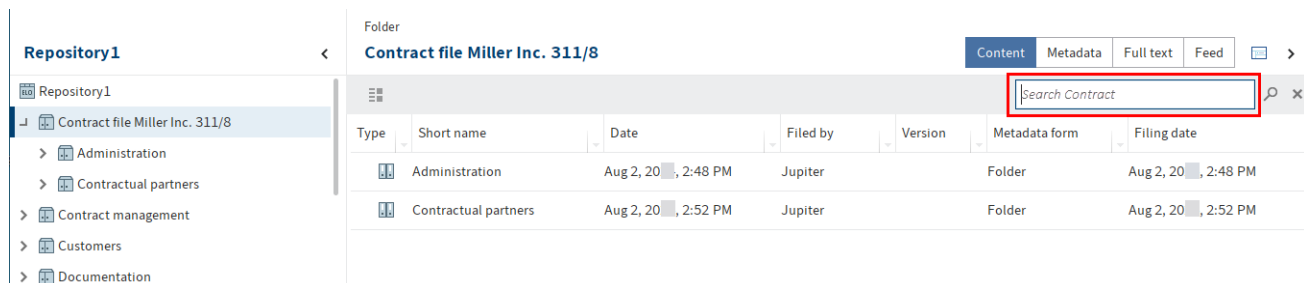


Outlook

You will find more information on the search here:

- 'Search' work area: General use, wildcard search, phrase search
- 'Search' tab

Search a business object



For business objects, you start a search within the region of a business object via the search field in the viewer pane. The system then searches for the entered short name. The search is restricted to the region of the business object, including the associated child folders.

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)

Information for administrators

When upgrading from ELO 11 or older versions, the active substitution rules are transferred and applied. This means that substitutions remain active for an unlimited period of time,

substitution rights remain inactive with the right *May activate/deactivate outside a scheduled period*. This requires ELO Indexserver 20.01 or a higher version.

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 Intray
- 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:

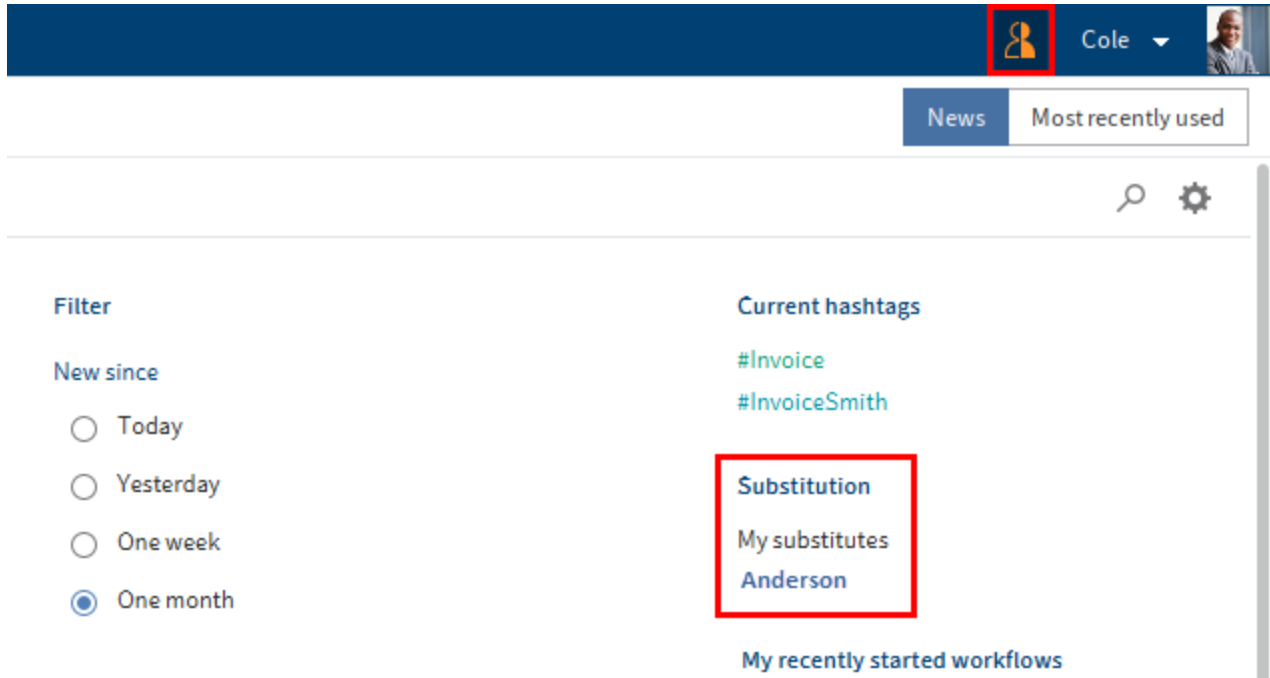
- **Personal tasks and workflows:** If you enable this option, your substitute can access tasks and workflows that you have been assigned personally, not those given to you as a member of a group.
- **Intray access:** If you enable this option, your substitute has access to your Intray.

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 off*. 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.

Additional information

-

Accept substitution

- Show substitution tasks
- View substituted user's Intray

Add and search annotations

Add annotations

Annotations include sticky notes, text notes, and stamps. Annotations are affixed to a single page of a document. You can only place annotations, text notes, and sticky notes on documents that can be displayed in the document viewer (PDF, TIFF, JPEG, ...).

The following example shows how to do this using a sticky note. The method is similar for other types of annotations.

Information

To use stamps, you must have been assigned at least one stamp by the administrator.

Information

You can use the Create margin note function if you want to add a note on an entire document or on a document in another format.

Requirements

- You need a document that can be displayed with the document viewer, e.g. a PDF or image file.

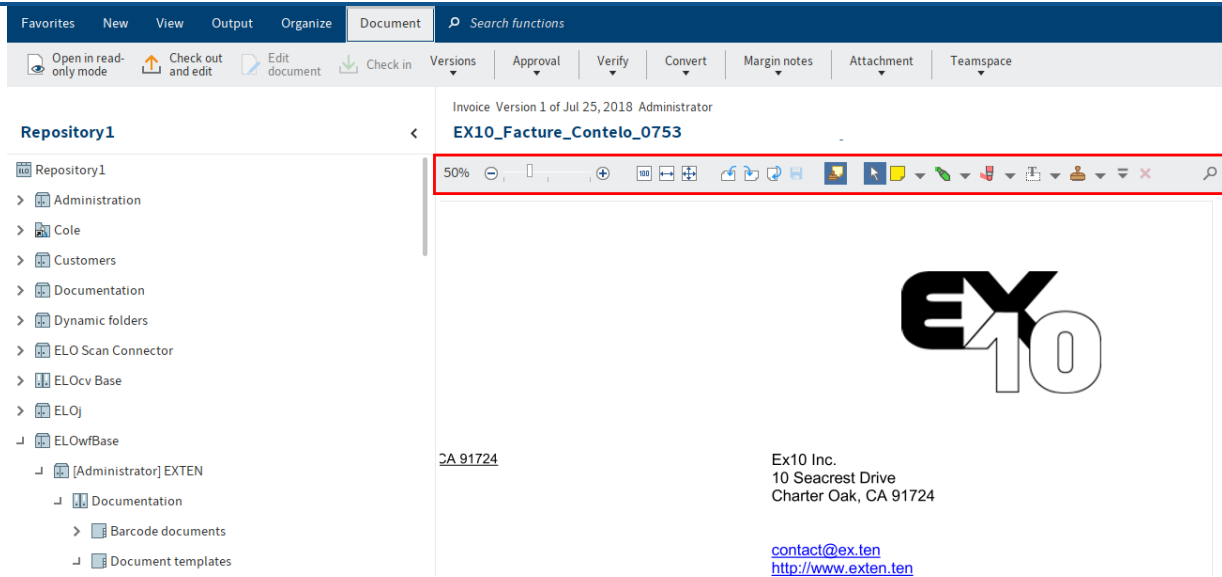
Method

1. Select the document that you want to place an annotation on.

The document is shown in the viewer pane.

Information

You can assign permissions so that not all users can see or edit annotations. You will find the permissions settings for sticky notes and text notes under *Ribbon > User menu [your name] > Configuration > Annotations*. You define the permission settings for stamps in the *Stamps overview* dialog box. You will find more information here: [Add stamps](#).



The document viewer toolbar is displayed above the document in the document viewer.

Apply a sticky note

2. Select the sticky note icon on the document viewer toolbar to enable the *Sticky note* function.

Information

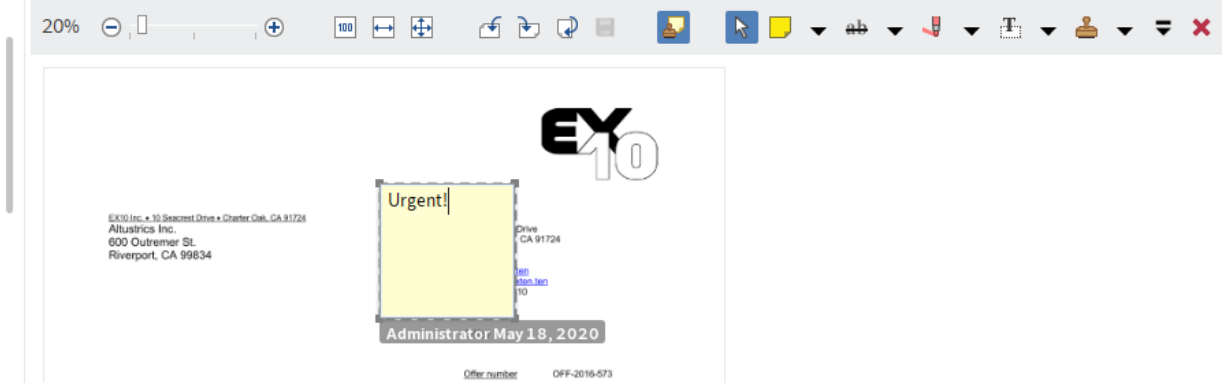
To use an annotation function multiple times in succession, hold down the ALT GR key as you click the function. To return to normal mode, choose the *Select* function (cursor icon).

Optional: To change the color, click the triangle next to the sticky note icon and select a different color from the drop-down menu.

The cursor turns into a sticky note in the color you selected.

3. Click the part of the document you want to place the sticky note on.

The sticky note is created. The dotted border indicates that the sticky note can be edited. The editor and the current date are displayed below the sticky note.



4. Enter text.

5. Click the area outside of the sticky note.

Result

The text you entered is saved. The sticky note is displayed on the document.

Information

You can use the context menu to open e-mail addresses, ELO links, and web pages in a sticky note (Available in: *Right-click > Open links*).

Outlook

Double-click the sticky note to edit it. To delete a sticky note, select the sticky note with the selection tool and then select *Delete* in the document viewer toolbar.

Add stamps

You can create new stamps or edit existing ones.

Information

Default stamps cannot be edited or deleted.

Method

1. In the viewer toolbar, select the triangle icon next to the stamp icon.
2. In the drop-down menu, select the *Stamps overview* button.

The *Stamps overview* dialog box opens.

3. Select *Add*.

The *Add stamp* dialog box opens.

In this dialog box, select the name as well as the text or image for a stamp. The following settings are available:

- Date: The current date is added to the stamp text. Appears in the text field as %d{dd.MM.y}.
 - Other usable formats: Select the triangle icon to open examples of other time and date formats.
- Time: The current time is added to the stamp text. Appears in the text field as %X.
- User: The name of the user is added to the stamp text. Appears in the text field as %u.
- Font
- Permissions

4. Select *OK* to save the stamp.

Result

The stamp appears in the drop-down menu that you open using the triangle icon next to the stamp icon.

Outlook

You can select the stamp you want to use from the drop-down menu.

To edit stamps of your own, select a stamp in the *Stamps overview* dialog box and choose *Edit*.

Search annotations

The *Search metadata* function can be used to search for margin notes and annotations.

Requirements

- There must be at least one document in ELO that contains an annotation or margin note.

Method

1. Open the *Search* work area.
2. On the ribbon, select *Search > Search logic > Search metadata*.

Keyboard shortcut: CTRL + F

The *Search metadata* dialog box opens. The default search form is selected.

Optional: Select a different search form if required.

3. Select the *Options* tab.

Search metadata

Available forms < Basic Extra text Options

Filter [Refresh]

Personal identifier [Text field]

End of deletion period [Date field] to [Date field]

End of retention period [Date field] to [Date field]

Entry type [All]

Notes [Urgent] [All notes]

Search range Search metadata version history

Search the following folder only ⓘ Annual budget [Select]

Search in displayed results

Search mode [AND (link fields with Boolean AND)]

Expand keyword list automatically ⓘ

[?] [OK] [Cancel]

4. Enter a search term in the *Notes* search field.

Information

If you want the search to include annotations that do not contain any text, enter an asterisk (*) in the search field.

Optional: You can select the type of notes you want to search for from the drop-down menu under the *Notes* field.

5. Select *OK*.

Result

The search starts. The search results appear in the *Search* work area.

User menu [your name]

Configuration

This dialog box is where you make system settings for the ELO Java Client. The dialog box consists of the following areas:

- Display
- Color scheme
- Dialog boxes
- Metadata
- Document preview
- Quick access to functions
- Annotations
- Advanced settings
- Technical presets

Search configuration

You can search all options in the configuration.

Enter a search term in the *Search configuration* field. To start the search, select *Start search* (magnifying glass icon) or press the ENTER key. To reset the search, select the *Reset search* button (arrow icon).

You can either make the desired setting in the results list or go to the corresponding area of the configuration by clicking on the header.

Configuration – Display

The *View* area contains the settings for the following topics:

- General
- Layout options
- Font
- Search
- Lists and tables
- Task list display options
- List of recently used entries

General

Feedback message duration in seconds: For actions without displaying a confirmation window, a notification is displayed in the top area of the program window. Use this option to set how long the notification is shown in seconds.

Always show split bar: You can show the split bar permanently in the viewer pane for entries. If you disable this option, the split bar is only shown if margin notes are available.

Keep entries on the Clipboard after logging off: You determine that the contents of the Clipboard are saved when closing the program.

Default language: You can change the language of the client.

Layout options

There are two layout options for the *Repository* work area:

- Tree only: The filing structure is displayed in a tree view. The entry is displayed to the right.
- Tree and table: In addition to the tree and entry, a table is displayed that shows the content of the element selected in the tree.

Font

Font size: Define the font size for the ELO Java Client user interface here.

Information

The ELO Java Client restarts automatically when you change the font size.

Search

Storage duration of the search entries in iSearch: Choose an option for the storage duration of the search results.

New search view for every metadata search: Select this option if you do not want to overwrite an existing search view when starting a search. A separate search view is created for each new search.

Search results context: Choose whether to display the *Hits* column or the *Results text* column in the search result list. To improve search performance, select the *Disable* option.

Number of synonyms: Use the spin box to specify the maximum number of synonyms suggested for a search term. To disable synonyms, select the value 0.

Maximum number of search results per page: Define in this area how many search results are displayed per page. The higher the number of search results per page, the longer the search takes. If the number of search results exceeds the defined number, you can access the other search results via the arrow buttons below the table with the search results.

Number of search suggestions per field: Specify how many search suggestions are displayed in a metadata field during the search.

- Minimum value: 50
- Maximum value: 10000

Information

If the value is too low, you may not get any suitable suggestions for some search queries.

The screenshot shows the search interface of the ELO Java Client. At the top, there is a search bar with a 'Start search' button, a dropdown menu set to 'in all areas', and a refresh icon. Below this, there are two dropdown menus: 'Filed by' and 'Metadata form'. The 'Metadata form' dropdown is open, showing a search input field with the placeholder text 'Filter/Apply with ENTER'. Below the search field is a list of categories with checkboxes and counts in parentheses:

Category	Count
<input type="checkbox"/> Cole	(2)
<input type="checkbox"/> Administrator	(45)
<input type="checkbox"/> Anderson	(72)
<input type="checkbox"/> Byte	(2)
<input type="checkbox"/> ELO Service	(11)
<input type="checkbox"/> Farrell	(2)
<input type="checkbox"/> Santini	(8)








Number of index columns for the metadata in the tasks and search results tables: Search results and tasks are shown in table form. The table columns correspond to the fields from the metadata. In this area, you specify how many fields from the metadata you want to display.

Search < **EX10_2020_Invoice_Cont**

invoices Start search in all areas ↕ ↻

Entry type ▾ Date ▾ Filed by ▾ Metadata form ▾

Type ▾ Short name

Type	Short name
 EX10_2020_Invoice_Contel	
 EXTEN Invoice	t name
 EXTEN Invoice	t name
 EXTEN Invoice	t name
 Repository	, Field, Has
 EXTEN Invoices	t name
 EXTEN Invoices	t name

Restore table columns

- Type
- Link
- Short name
- Date
- Hits
- Relevance
- Filed by
- Version
- Metadata form

Lists and tables

Show version in the tree view: Select whether and what version information to show in the tree view after the short name.

Show document date in the tree view: If you enable this option, the document date is shown in front of the short name.

Show folder date in the tree view: If you enable this option, the folder date is shown in front of the short name.

Show contents of priority fields in the tree view: If you enable this option, the contents of the fields marked as priority fields in a metadata form are displayed after the short name in the tree view.

Show version information in additional columns: Select this option to show additional information on the entries. This includes the the version comment, the version date, and the version size, among others.

Number of priority fields in the table columns: Define the maximum number of columns with high priority that may be displayed in tree view. A column with high priority is used to display a field of a metadata form.

Information

Having a large number columns will mean it takes longer to load the view.

Maximum size of thumbnails in pixels: Define the maximum size of the thumbnails in this area. Enter the length of the longest side in pixels. The size of the thumbnails can also be changed with the zoom function.

Task list display options

Refresh interval for the list in minutes: Specify how often you want the task list to be refreshed by entering a value to the field *Refresh interval for the list in minutes*. If the tasks list is not updated automatically, enter 0.

Show tasks due in the following number of days: The task list in the *Tasks* work area contains an overview of all due tasks. Use this option to specify in how many days a task must be due for it to be displayed in the task list. For example, if you enter 10 days, all tasks that are due in the next 10 days will be displayed. Tasks that are only due in 20 days are not displayed.

Maximum number of tasks displayed: With this option, you specify the maximum number of tasks that are displayed in the task list of the *Tasks* work area.

Information

This setting only refers to the number of displayed tasks and *not* to the total number of tasks in ELO.

List of recently used entries

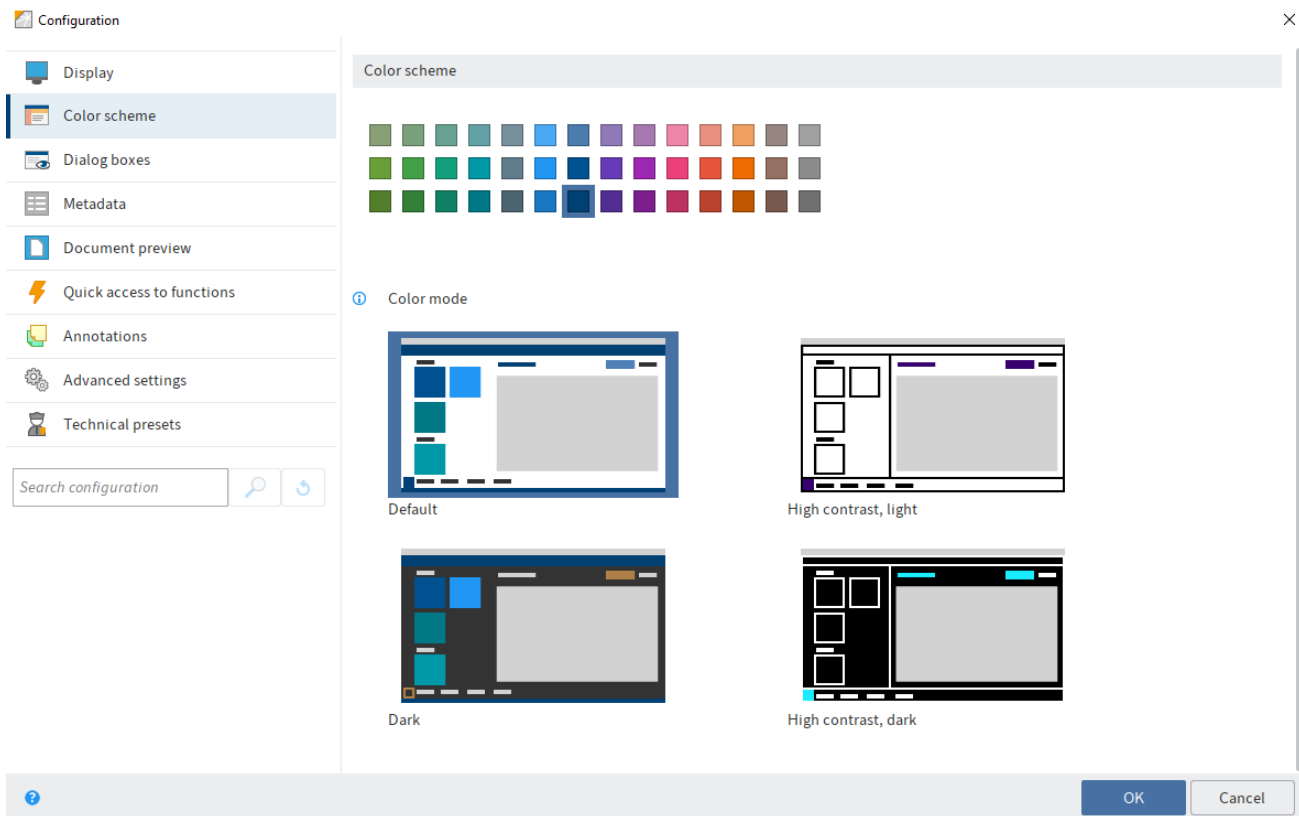
Maximum number of documents in the "Most recently used" list: Use this option to define the maximum number of recently used entries that are shown. You will find the overview of recently used entries in the *My ELO* work area.

Include stored documents and folders: If you enable this option, the list will also include documents you stored in ELO and folders you created.

Save selected entries after the set period: If this option is enabled, you will also see entries that you have selected in the viewer pane but have not executed a function on.

Use the slider to set how much time should pass before an entry you selected appears in the list. If you view an entry for a shorter time than set, it won't appear in the list.

Configuration - Color scheme



You will find the following settings in the *Color scheme* area.

Color scheme

Choose the color scheme for the ELO Java Client program interface in this area.

You can change the display mode via the preview images. You can select from four display modes:

- Default
- Dark
- High contrast, light
- High contrast, dark

Information

The ELO Java Client restarts automatically when you change the color scheme or the display mode.

Configuration - Dialog boxes

Configuration

- Display
- Color scheme
- Dialog boxes**
- Metadata
- Document preview
- Quick access to functions
- Annotations
- Advanced settings
- Technical presets

Search configuration

General

- Show documents in tree view in dialog boxes ⓘ
- Ask for confirmation when the following number of documents are opened simultaneously ⓘ - +
- Always show buttons in dialog boxes in this order: ⓘ
 - OK, cancel
 - Cancel, OK

Version comment

Dialog box for entering a version comment:

- Always show, even when filing the first version
- Only show when filing a new version
- Never show

Notifications

- Show message when postponing a workflow

OK Cancel

The *Dialog boxes* area contains the settings for the following topics:

- General
- Version comment
- Information
- Annotations when sending as PDF
- Inherit permissions when moving entries
- Drag-and-drop
- Duplicate check
- Load new version
- Check in
- Delete reference
- Multiple entries as link
- Print separator pages
- Delete from the Clipboard
- Delete from the search
- Logon dialog box

General

Show documents in tree view in dialog boxes: If this option is selected, the documents are displayed in dialog boxes with a tree view. If the option is disabled, only the folder structure is displayed.

Ask for confirmation when the following number of documents are opened simultaneously: When you open or edit many documents at the same time, it can take a while for them to load in the client. Use this option to specify how many documents you can open or edit at the same time.

Always show buttons in dialog boxes in this order: This option enables you to specify the order of the *OK* and *Cancel* buttons in the dialog boxes.

Version comment

Dialog box for entering a version comment: When you store a new version of a document, you can enter a comment for this version. Select an option for displaying the version dialog box.

Messages

Show message when postponing a workflow: If you select this option, you will be notified that the postponed workflows will be hidden in the task list.

Show message if retention period was set: If you select this option, a notification window is displayed when closing the *Metadata* dialog box. The message only appears if you have entered a retention period on the *Options* tab. In this case, you will be notified that you cannot delete a document with a retention period before the deadline has expired.

Show message if metadata does not contain a personal identifier: If this option is enabled, a message is displayed when closing the *Metadata* dialog box if the fields *Personal identifier* and *Deletion period* are empty.

Show message when setting the document status to "Non-modifiable": Define whether you want to display a message when setting the *Non-modifiable* document status.

Show message when deleting files in the In tray: Documents in the In tray have not been filed to ELO yet. If you delete documents in the In tray, the documents (and metadata) are removed and cannot be restored. Select this option to show a message when deleting In tray documents. You will be asked to confirm the deletion process.

Show message in the "Metadata" dialog box when changing metadata forms: If you select this option, a message is displayed when you assign the entry a different metadata form in the *Metadata* dialog box. The message only appears if a field that you already edited does not exist in the new metadata form.

Show message when removing your own read or write permissions: Specify whether to display a message when a user wants to revoke their own read or write permissions.

Show message when overwriting existing metadata with serial filing: Specify whether to display a message when overwriting existing metadata with serial metadata.

Show message when searching for multiple terms in different areas of iSearch: Specify whether to display a message when you perform a search with multiple terms in multiple areas (full text, metadata, and feed). When you perform a search with multiple terms, only results containing all the search terms are found.

Show restart required message when activating/deactivating a substitution: Specify whether you want a message to be displayed when you activate or deactivate a substitution. Changes to substitutions do not take effect until you restart the client.

Annotations when sending as PDF

In this area, you specify how annotations on a document are handled when creating and sending a PDF file.

Please note

When you create a PDF, margin notes on the split bar are not embedded. The embedded annotations can no longer be edited.

- Confirm via a dialog box: A dialog box opens. In this dialog box, you can choose how to proceed with the annotations.
- Do not embed annotations: The annotations will not be embedded in the PDF.
- Embed annotations in the PDF file: The annotations will be embedded into the PDF during conversion.

Inherit permissions when moving entries

Behavior for differing permissions when moving documents: In this area, specify what to do with permissions when moving an entry in the repository. Choose from the following options:

- Confirm via a dialog box: A dialog box opens. In this dialog box, you can choose how to proceed with permissions when moving entries.
- Keep previous permissions unchanged: The moved entries retain the previous permissions.
- Replace with the permissions of the target folder: The moved entries inherit the permissions of the target folder.
- Replace permissions inherited from the previous folder, keep individual permissions: The moved entries inherit the permissions from the target folder. Any additional permissions will be retained.

Drag-and-drop

Behavior when dragging a file within the repository: This is where you specify the settings for moving entries in the *Repository* work area using drag-and-drop.

Choose from the following options:

- Confirm via a dialog box: A dialog box opens. This is where you specify whether the entry is moved or referenced.
- Move: The entry is moved to the new position without confirmation.
- Reference: The entry remains at its original filing location. A reference to the entry is created at the target location with confirmation.

Behavior when dragging a file to a document in ELO: This is where you specify the settings for dragging an external document onto a document that already exists in ELO.

Choose from the following options:

- Confirm via a dialog box: A dialog box opens. In the dialog box, you can determine what ELO should do in each case.
- File as a new version of the document: This creates a new version of the document.
- Attach to front: The file is attached to the front of the document you have dragged it to.
- Attach to back: The file is attached to the end of the document you have dragged it to.
- File as new document in ELO: The document is filed to ELO as a new document.
- File as a new document with the same metadata: The document is filed to ELO as a new document. The new document is filed with the same metadata as the document that you drag the file to.

Information

If you have selected the *File as a new version of the document* option, you cannot drag and drop onto a checked-out or deleted document.

Confirm via dialog box if you want to cancel metadata entry when filing multiple documents: If this option is enabled, a dialog box will appear if you cancel the metadata entry asking whether you want to file the documents with the default metadata. If the option is not enabled, the action is aborted without asking you for confirmation.

Duplicate check

Behavior when filing a duplicate: When filing documents, the client recognizes whether the document already exists in ELO. This is where you specify how to proceed with duplicates.

Choose from the following options:

- Confirm via a dialog box: A dialog box opens. In the dialog box, you can determine what ELO should do in each case.
- Reference: Automatically creates a reference. The entry only exists once in ELO.
- File again: The document is stored in duplicate.

Load new version

Behavior with an identical new document version: This option refers to the *Load new version* function (available in: *Ribbon > Document > Versions*).

This determines how the program behaves when an identical document is loaded as a new document version using the *Load new version* function.

Choose from the following options:

- Confirm via a dialog box: A dialog box opens. In the dialog box, you can determine what ELO should do in each case.
-

Cancel loading the new version: No new version is created.

- File as new version anyway: Creates a new version with identical content.

Check in

Behavior when checking in an unmodified document: This option refers to the *Check in* function (available in: *Ribbon > Document*).

Choose from the following options:

- Confirm via a dialog box: A dialog box opens. In the dialog box, you can determine what ELO should do in each case.
- Cancel editing and restore original version: A new version is not created.
- File as new version anyway: Creates a new version with identical content.

Delete reference

Behavior when deleting a reference: Use this option to specify whether you want a dialog box to appear before deleting a reference and what ELO should do if the dialog box is deactivated.

Choose from the following options:

- Confirm via a dialog box: A dialog box opens. In the dialog box, you can determine what ELO should do in each case.
- Delete reference only: If this option is enabled, a dialog box will not appear. Only the reference will be deleted. The original document will not be deleted.
- Delete original and reference: If this option is enabled, a dialog box will not appear. The reference and the original document will be deleted.

Multiple entries as link

Behavior when creating a link when multiple entries are selected: Use this setting to define the program behavior when sending multiple entries as an ELO link.

Choose from the following options:

- Confirm via a dialog box: A dialog box opens. In the dialog box, you can determine what ELO should do in each case.
- Create one ELO link for each entry: This option creates an ELO link for each entry sent.
- Create one ELO link for all entries: This option creates one ELO link for all entries.

Print separator pages

Behavior when printing a separator page: This is where you specify the type of separator page to be printed.

Sometimes, separator pages are needed, e.g. for the *Join (separator pages)* function. To print a sample separator page, select *New > Scan > Scan profiles > Print separator page* on the ribbon.

Choose from the following options:

-

Confirm via a dialog box: A dialog box opens. In the dialog box, you can determine what ELO should do in each case.

- Print separator page with horizontal bar: This option prints separator pages with a horizontal bar..
- Print separator page with vertical bar: This option prints separator pages with a vertical bar.

Delete from the Clipboard

Behavior when deleting from the Clipboard: When you select this option, a message appears when you delete an entry on the Clipboard. You must select whether you want to only remove the entry from the Clipboard or delete it in ELO as well.

Choose from the following options:

- Confirm via a dialog box: A dialog box opens. In the dialog box, you can determine what ELO should do in each case.
- Remove from Clipboard: The entry is deleted from the Clipboard but remains in ELO.
- Delete in ELO: The entry is removed from the Clipboard AND deleted in ELO.

Delete from the search

Behavior when deleting in the search: This option enables you to specify how the program behaves when you delete a document in the *Search* work area.

Choose from the following options:

- Confirm via a dialog box: A dialog box opens. In the dialog box, you can determine what ELO should do in each case.
- Remove from search results: The entry is removed from the search results but remains in ELO.
- Delete in ELO: The entry is removed from the search results AND deleted in ELO.

Logon dialog box

Show logon dialog box when closing the program: If this option is selected, the logon dialog box is displayed when closing the program.

Show dialog box for selecting functional roles during logon: If a user has been assigned functional roles (e. g. *Accounting*), a dialog box for enabling the roles opens when the users logs on.

Configuration - Metadata

Configuration

- Display
- Color scheme
- Dialog boxes
- Metadata**
- Document preview
- Quick access to functions
- Annotations
- Advanced settings
- Technical presets

Search configuration

General

- Use default keyword list for fields ⓘ
- Sort keyword lists alphabetically ⓘ
- Automatically activate keyword list filter ⓘ
- Show "Metadata" dialog box on filing if a metadata form has not been assigned ⓘ

Show metadata

- Show extra text in the metadata preview

Default settings for metadata

Form for new folders: Folder

Form for new documents: Basic entry

Form for the metadata search: Search

OK Cancel

The *Metadata* area contains the settings for the following topics:

- General
- Show metadata
- Default settings for metadata
- Metadata form for different file types

General

Use default keyword list for fields: Select this option to use a default keyword list (global) for fields without a separate keyword list.

Sort keyword lists alphabetically: Select this option to sort keyword lists alphabetically.

Automatically activate keyword list filter: When this option is enabled, the keyword list is filtered automatically based on the characters entered when assigning metadata.

Show "Metadata" dialog box on filing if a metadata form has not been assigned: Select this option to open the *Metadata* dialog box when filing a new document. The dialog box only appears if the document has not been assigned a metadata form. If the option is disabled, the document is automatically filed with the default metadata form for new documents. The file name is used as the short name.

Show metadata

Show extra text in the metadata preview: Enable this option to display the text entered on the *Extra text* tab of the *Metadata* dialog box in the metadata preview.

Default settings for metadata

Form for new folders: Specify which metadata form to use for new folders.

Form for new documents: Specify which metadata form to use for new documents.

Form for the metadata search: Select the metadata form that is used by default for the metadata search.

Metadata form for different file types

In this area, you can link file extensions to metadata forms. The file extension is recognized when you file a document. The associated metadata form is set by default. When filing without metadata, the linked metadata form is used automatically.

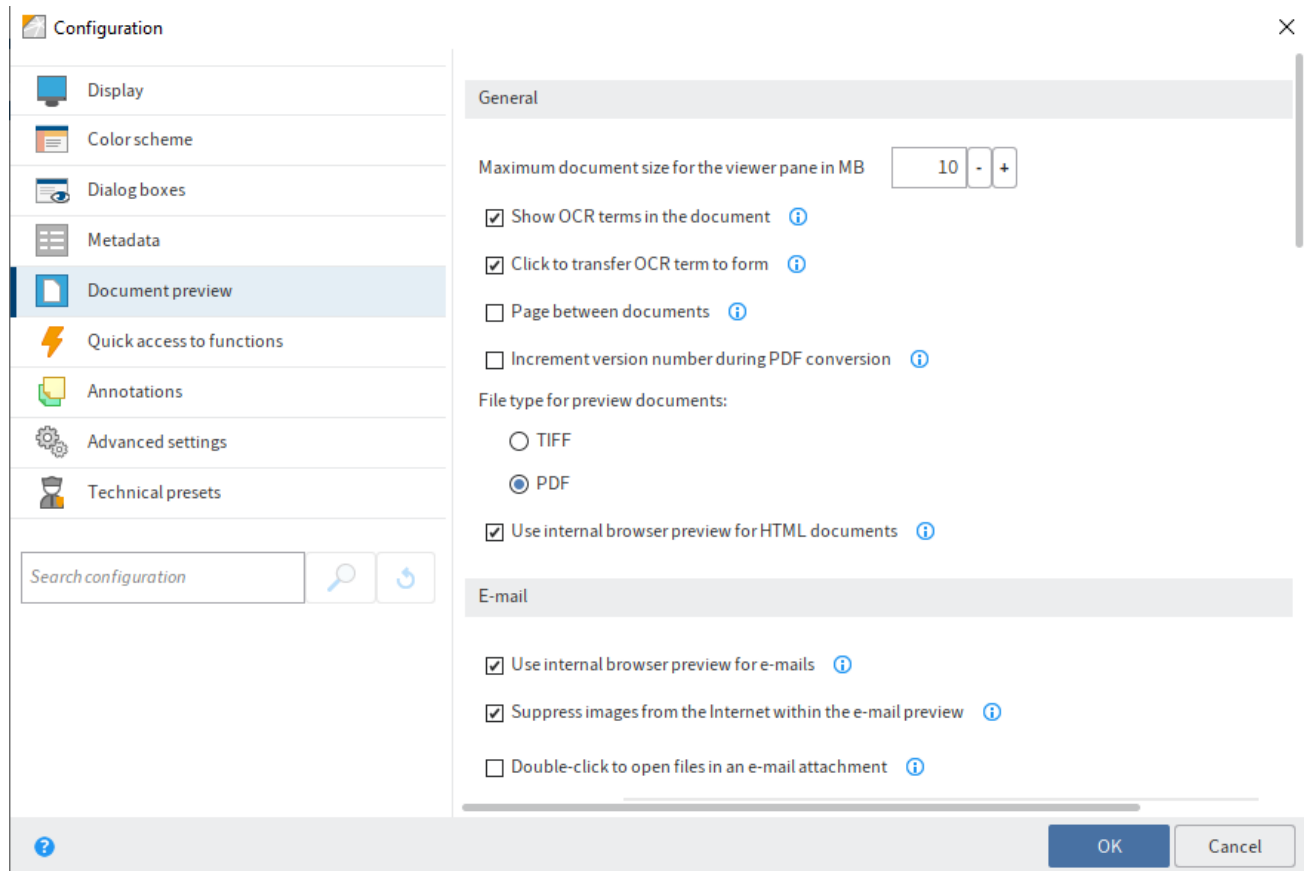
By default, the *.js* and *.vbs* file extensions are linked to the *ELOScripts* metadata form and the *.eml* and *.msg* file extensions are linked to the *E-mail* metadata form.

Use default: Restores the original settings in this area.

New: Creates a new row for linking the file type and metadata form. Enter a file extension and select a metadata form.

X (Remove mapping): Removes the corresponding line

Configuration - Document preview



The *Document preview* area contains the settings for the following topics:

- General
- E-mail
- Preview configuration for different file types
- Preview plug-ins

General

Maximum document size for the viewer pane in MB: Specify the maximum number of megabytes (MB) a document can have in the preview. If a document exceeds the defined size, a notification will be displayed instead of the preview. The value 0 disables the preview.

Show OCR terms in the document: Select this option to highlight the words in the document recognized by OCR. As soon as you point to a word, the word is highlighted. If the *Metadata* dialog box is open, you can click a word in a document to add it to the metadata.

Click to transfer OCR term to form: Transfer words recognized by OCR to the currently open form with a click.

Page between documents: If you enable this option, you can go straight to the next document when you reach the start or the end of the original document in the viewer pane.

Increment version number during PDF conversion: If this option is enabled, the document version is incremented during PDF conversion.

File type for preview documents: This setting refers to the *Create document preview* function. Specify whether to display preview documents in TIFF or PDF format.

Please note

Depending on the selected format, the correct ELO printer (ELO TIFF Printer or ELO PDF Printer) must be installed.

Use internal browser preview for HTML documents: If this option is enabled, HTML documents are displayed with the internal browser instead of the embedded Internet Explorer.

E-mail

Use internal browser preview for e-mails: If this option is enabled, e-mails are displayed with the internal browser instead of the embedded Internet Explorer.

Suppress images from the Internet within the e-mail preview: If this option is selected, images in e-mails that are downloaded from the Internet will not be displayed. However, embedded images in e-mails will be displayed.

Double-click to open files in an e-mail attachment: In this field, you can enter the file extensions that you want to open by double-clicking. For all other file extensions, a dialog box for saving the e-mail attachment opens.

Information

You can enter multiple file extensions. You need to separate the entries with periods.

Certificates for decrypting e-mails: This option allows you to specify where ELO should import the certificates for decrypting e-mails from.

- Use Windows certificate store: If you are using ELO on a Microsoft Windows system, you can use the certificates supplied by Microsoft Windows.
- Use certificate store from specified path: If you are not using ELO on a Microsoft Windows system, or if you do not want to use the certificates supplied by Microsoft Windows for other reasons, you need to select this option. In addition, you must specify where you want to store the certificates in the *Path* field.

Preview configuration for different file types

In this area, you specify which type of preview to use for different file extensions. If a preview class is not defined for a file extension, the browser will be used for the preview.

Use default: Restores the original settings in this area.

New: Creates a new row for linking the file type and preview method. Enter a file extension and select a preview method.

Confirm: When displaying this file type, ELO will ask every time whether you want to open the file with the default viewer.

Remove mapping (X icon): Removes the corresponding line

Choose from the following options for configuring the preview:

- **ActiveX plug-in preview:** This preview type now supports viewer plugins from the ELO Windows Client.
- **Apple OS X preview:** Viewer for displaying files on the macOS operating system
- **Image preview:** Viewer for JPG, BMP, and TIFF that can be used to place annotations on documents.
- **Browser preview:** Preview in the standard browser.
- **Code preview:** Viewer with syntax highlighting for displaying code.
- **DXL preview:** Viewer for documents in DXL format.
- **EML e-mail preview:** Viewer for IBM Notes e-mails in .eml format.
- **Windows Media Player preview:** Preview for audio and video files based on JavaFX.
- **MSG e-mail preview:** Viewer for Microsoft Outlook e-mails in .msg format.
- **Windows Media Player preview (Windows):** Preview in Windows for audio and video files.
- **MS Office preview (Windows):** Recommended viewer for Microsoft Office documents newer than 2003. Also suitable for Apache OpenOffice documents (ODT).
- **OpenOffice preview:** Viewer for Apache OpenOffice documents. Requires an installation of Apache OpenOffice including an additional module or LibreOffice compatible with the Java version used in the ELO Java Client.
- **PDF preview:** Viewer for PDF documents with which annotations are affixed to documents. As an alternative, you can use Internet Explorer with the Acrobat Reader plug-in (the annotations on the document are not shown).
- **Text preview:** Viewer for text files; allows two font types, adjustable font size, and automatic line breaks.
- **Show preview document:** With this setting, preview documents created previously are shown instead of the original documents.
- **ZIP preview:** Viewer for ZIP folders, shows file contents as a tree. Files can be displayed or saved to disk from the context menu.

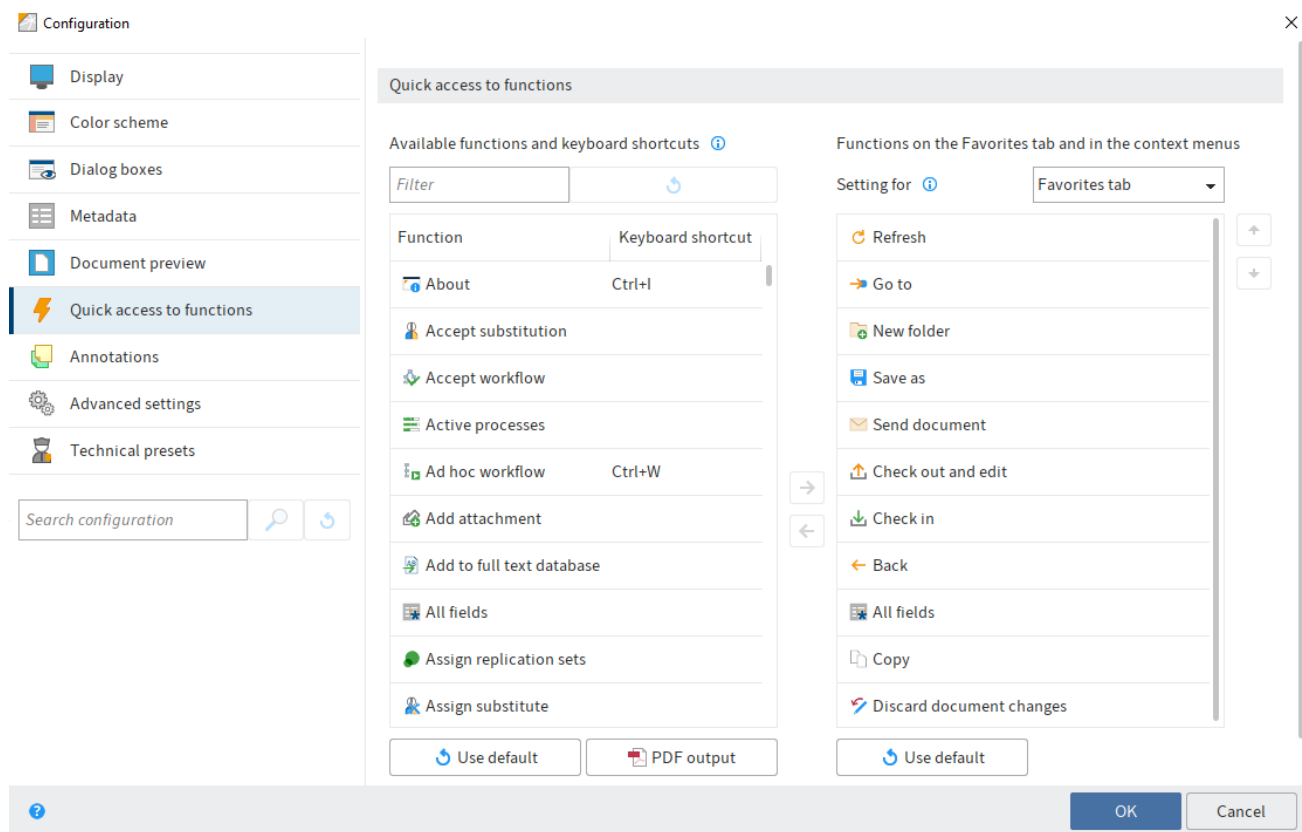
Preview plug-ins

In this area, you can link file extensions to preview plug-ins.

New: Creates a new row for linking the file type and preview plug-in. Enter a file extension and the corresponding OLE object ID.

Remove mapping (X icon): Removes the corresponding line

Configuration - Quick access to functions



You will find the following settings in the *Quick access to functions* area.

Quick access to functions

Available functions and keyboard shortcuts: In this column, select the function that you want to add to the *Favorites* tab or a context menu. To add a function, select the function and select *Add function* (arrow icon pointing to the right).

Filter: Use the *Filter* field to filter the *Available functions and keyboard shortcuts* column. The column is updated as soon as you enter a character.

Reset filters: Deletes the current filter from the *Filter* field. All functions are displayed.

Functions on the Favorites tab and in the context menus: In this column you can see which functions are already on the *Favorites* tab or in the selected context menu.

Settings for: Use the *Settings for* drop-down menu to choose whether you want to edit the *Favorites* tab or one of the context menus.

The following items are available for selection:

- Favorites tab
- Entry context menu (context menu for entries in the repository)
- Tasks context menu
-

Intray context menu

Information

Functions only appear in the context menu if they are executable in the given context.

Assign keyboard shortcuts to function

You can assign keyboard shortcuts to functions in the *Available functions and keyboard shortcuts* column.

Method

1. Select the function you want to assign a keyboard shortcut to.

The function is now marked as selected.

2. Enter the desired keyboard shortcut, e.g. CTRL + L.

Please note

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

Result

Enter the keyboard shortcut in the field to the right of the function.

Delete keyboard shortcut

Method

1. Select the function with the keyboard shortcut you want to delete.
2. Press the BACKSPACE key.

Result

The keyboard shortcut is deleted.

Reset keyboard shortcuts

You can restore all keyboard shortcuts to default values. Click the *Use default* button below the *Available functions and keyboard shortcuts* column.

Keyboard shortcuts as PDF file

You can save an overview of the keyboard shortcuts as a PDF file. Click the *PDF output* button below the *Available functions and keyboard shortcuts* column.

Add function

Method

1. Use the *Settings for* drop-down menu to choose where you want to add a function.
2. Select the desired function in the *Available functions and keyboard shortcuts* column.
3. Select *Add function* (arrow icon pointing to the right).

Information

The *Separator line* function can be added as often as you like. The separator line is used to group functions and to set them apart from one another.

Result

The function is displayed in the *Functions on the Favorites tab and in the context menus* column.

Change order

You can change the order of the entries on the *Favorites* tab and in the context menus.

1. Use the *Settings for* drop-down menu to choose what you want to edit.
2. Select the desired function in the *Functions on the Favorites tab and in the context menus* column.
3. Select the *Move up* button (arrow pointing upwards) to move the selected function up.

Alternative: Select the *Move down* button (arrow pointing downwards) to move the selected function down.

Remove function

1. Use the *Settings for* drop-down menu to choose what you want to edit.
2. Select the desired function in the *Functions on the Favorites tab and in the context menus* column.
3. Select *Remove function* (arrow icon pointing to the left).

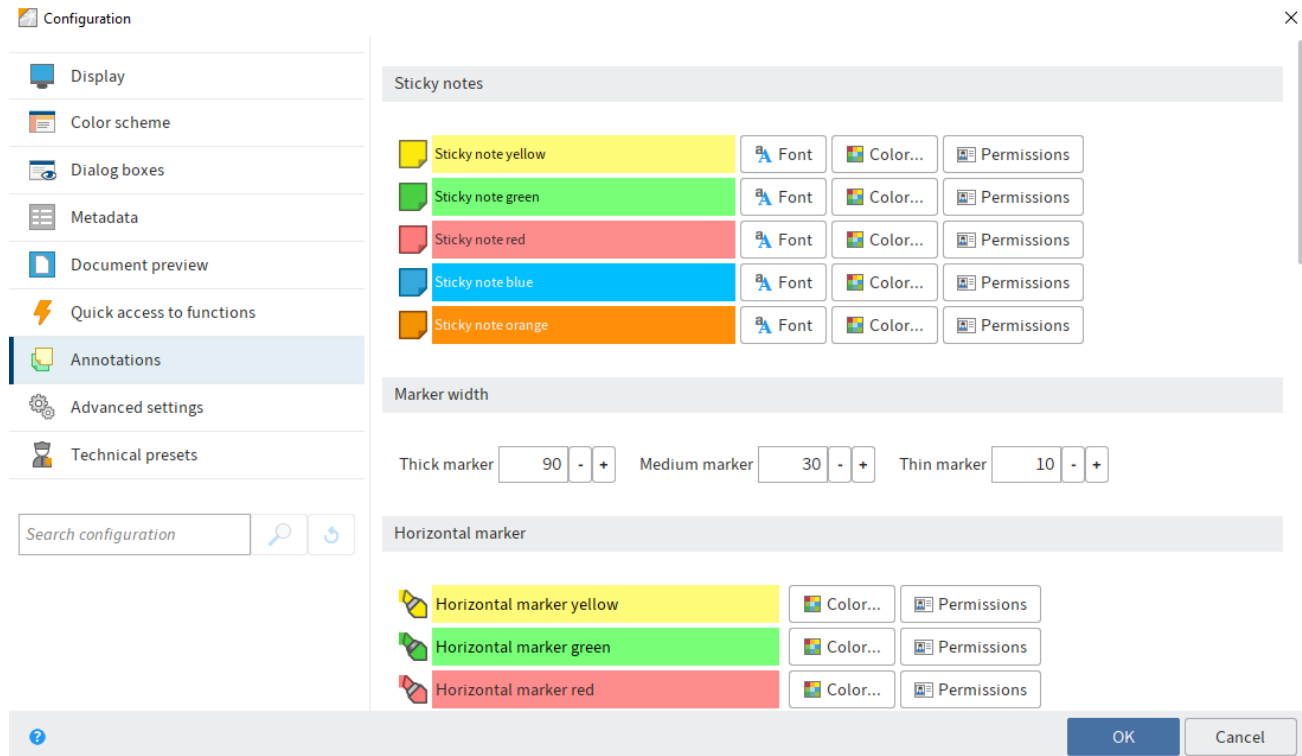
Information

You can also add or remove functions by double-clicking them.

Reset functions

You can also restore the default settings of the *Favorites* tab or the context menus. Click *Use default* below the *Functions on the Favorites tab* and in the *context menus* column.

Configuration - Annotations



The *Annotations* area contains the settings for the following topics:

- Sticky notes
- Marker width
- Horizontal marker
- Freehand marker
- Rectangle marker
- Strikethrough
- Redaction
- Text note configuration

Sticky notes

A sticky note is a colored text field that you can place directly on a document to record information. There are five different colors available for sticky notes. The default colors are yellow, green, red, blue, and orange. You can define these colors individually.

You can make the following settings:

Font: Opens the *Font* dialog box. You can set the font, font size, font style, font color, and permissions for each type of sticky note here.

Color: Opens the *Color selection* dialog box. Use the dialog box to change the color of the respective sticky note.

Permissions: Opens the *Permissions* dialog box. Use the dialog box to define the permission settings for the respective sticky note type.

Marker width

The *Horizontal marker*, *Freehand marker*, and *Strikethrough* tools are available in three different sizes (widths). You can define the widths of the markers with the *Large marker*, *Medium marker*, and *Small marker* fields.

Information

The values are about the same as the point size, depending on the font. For example, if you enter the value *12*, this corresponds approximately to the width of a line in 12-point *Arial* font.

Horizontal marker

You can define five types for the *Horizontal marker* tool. You can define the colors and permissions for each type.

Color: Opens the *Color selection* dialog box. Change the color of the respective marker in the dialog box.

Permissions: Opens the *Permissions* dialog box. Define the permission settings for the respective marker in the dialog box.

Freehand marker

You can define five types for the *Freehand marker* tool. You can define the colors and permissions for each type.

Color: Opens the *Color selection* dialog box. Change the color of the respective marker in the dialog box.

Permissions: Opens the *Permissions* dialog box. Define the permission settings for the respective marker in the dialog box.

Rectangle marker

You can define five types for the *Rectangle marker* tool. You can define the colors and permissions for each type.

Color: Opens the *Color selection* dialog box. Change the color of the respective marker in the dialog box.

Permissions: Opens the *Permissions* dialog box. Define the permission settings for the respective marker in the dialog box.

Strikethrough

You can change the settings of the *Strikethrough* tool.

Color: Opens the *Color selection* dialog box. Change the background color of the *Strikethrough* tool in the dialog box.

Permissions: Opens the *Permissions* dialog box. Define the permissions settings for the *Strikethrough* tool in the dialog box.

Redaction configuration

The *Redaction* tool can be used to render texts unreadable.

Information

For the *Redaction* function to be available, some settings must be made in the ELO database. You can find more detailed information in the documentation [ELO Redaction](#).

Permissions: Opens the *Permissions* dialog box. Define the permission settings for redacting documents in the dialog box.

Text note configuration

You can define five types for the *Text note* tool. You can set the font, font size, font style, font color, and permissions for each type.

Font: Opens the *Font* dialog box. You can set the font, font size, font style, font color, and permissions for each type of text note here.

Permissions: Opens the *Permissions* dialog box. Define the permission settings for each type of text note in the dialog box.

Configuration - Advanced settings

The *Advanced settings* area contains the settings for the following topics:

- General
- Settings for the Intray work area
- Separator page recognition
- Intray folder in the file system
- Workflow
- My ELO
- Signature
- Behavior on double-click

General

Drag and drop onto the top level of a view: If this setting is selected, the entry is inserted at the top repository level when dragging and dropping onto a tile view. If this option is disabled, the entry is inserted at the location currently selected in the view.

Information

If a document is dragged to a view that only contains a branch of the repository, the document is filed at the top level of this view.

Always use short name as file name outside of ELO: Select this option to always use the short name of an entry as the file name. The file name is then used when sending a document by e-mail, for example. If this option is enabled, the *File name* field is ignored on the *Options* tab of the metadata form.

Optimize collaboration with ELO Desktop: This option should only be selected if the ELO Java Client is used together with ELO DMS Desktop. Select this option to avoid slow load times when opening Microsoft Office documents.

Transfer checked-out documents to the server when logging off: If you log onto another workstation, you have access to documents you have checked out there as well.

Checking out a folder: Check out and lock references: This option is for checking out folders. If there are references in a checked-out folder, these are also stored in the checkout directory. To lock the references and original files when checking out folders, select the option *Checking out a folder: Check out and lock references*.

Please note

If you check out a folder with all the references, you cannot check in the references separately. Instead, you need to check in the entire folder. In addition, you cannot check in the original documents that are linked to the references until you have checked in the entire folder.

Automatically compress e-mail attachments into a ZIP folder: Enter a maximum value here. If the number of e-mail attachments exceeds this limit, the e-mail attachments will be automatically compressed into a ZIP folder.

Settings for the Intray work area

Refresh interval for the Intray in minutes: Enter a number greater than 0 in the Refresh interval for the Intray in minutes field if you want the *Intray* work area to automatically refresh at regular intervals. The value 0 means that the Intray will not automatically refresh.

Refresh Intray when opened: Select this option to automatically refresh the *Intray* work area every time you open it. This also updates the monitored folders.

Start OCR (text recognition) in the Intray: Select this option to start text recognition as soon as a document is filed to the *Intray* work area. The text content of the document is available when entering metadata, for example.

Show preview of the scanned pages during the scan process: Select this option to display the preview of the scanned pages during the scan process.

Automatically file documents assigned a metadata form with existing filing definitions: Select this option to automatically file documents if you have entered all metadata and the documents have a valid filing definition. The documents are filed as soon as you close the *Metadata* dialog box by selecting *OK* or *Apply and next*. You do *not* need to run the Automatic filing function.

Information

You cannot create or edit metadata forms in the ELO Java Client. Contact your system administrator if you have any questions about automatic filing and the filing definition.

Automatically convert TIFF files to PDF when filing to ELO: TIFF files are automatically converted into PDF files when filed to ELO.

Create searchable PDFs: If this option is enabled, TIFF files are sent to OCR during automatic conversion to create searchable PDF files.

Save Intray on server when logging off: Select this option to save checked out documents to the *Intray* work area after the user logs off. If the user logs onto another workstation, they have access to their Intradocuments.

Separator page recognition

Join pages: Specify which type of separator pages to use for the Join (separator pages) function.

The following options are available:

- Separator page
- Blank page
- Delete separator page and blank pages
- Triangle to mark the first page

Margin in percent: Enter a percentage of the margin of a separator page to be ignored during recognition.

Threshold for white area in percent: Enter a threshold for the white area of a separator page to be ignored. This makes it easier to recognize noisy separator pages.

Threshold for split bar in percent: Enter a threshold for the split bar of a separator page to be ignored. This makes it easier to recognize noisy separator pages.

Intray folder in the file system

Include child directories when moving to the Intradocuments: Enable this option to include all child directories of the specified Intradocuments directories when refreshing the *Intray* work area.

New: Select this button to select a folder in the file system to use as the Intradocuments folder.

Information

You can use the variables %USERTEMP% and %APPDATA% in the Intradocuments folder.

Directory: This field shows the path to the designated Intradocuments folder.

X (Remove directory): Removes the corresponding link to a folder in the file system.

Workflow

Default duration of a workflow postponement in days: You can postpone a workflow for later editing. Use this option to define the default settings in days for the *Postpone workflow* dialog box.

Start workflow in edit mode: Select this option to edit the selected workflow template when starting a new workflow. If this option is not checked, you only see a list of templates. In this case, you can open the workflow templates using the *Show template* button.

Show successor node users when forwarding workflows: The name of the successor node will be displayed in the *Forward workflow* dialog box in addition to the name of the responsible user/group.

Automatically refresh the "Workflow overview": This options allows you to specify whether the list of workflows in the *Workflow overview* dialog box is refreshed automatically.

Default name for new workflows: In this area, you specify the default settings for the name of new workflows. You can change the name when you start the workflow.

Choose from the following options:

- Name of workflow template
- Short name of entry
- Name of workflow template + short name of entry
- Short name of entry + name of workflow template

My ELO

This is where you define the settings for automatically subscribing to a feed.

Choose from the following options:

- When filing a document
- When creating a new folder
- When checking in a new version
- When creating a post or comment

Signature

Recognize signature files: In the *File extensions* field, specify which file extensions to recognize as signature files.

Information

You can enter multiple file extensions. You need to separate the entries with periods.

Save signature files: Select this option to save signature files in ELO.

Include signature file when sending documents: Select this option to send the associated signature file along with a document.

Automatically save the signature verification log as an attachment: Select this option to store the verification logs of the documents as an attachment.

Check signature on display: Select this option to run the signature check while displaying a signed document.

Behavior for signing PDF documents: In this area, you specify what to do when signing PDF documents.

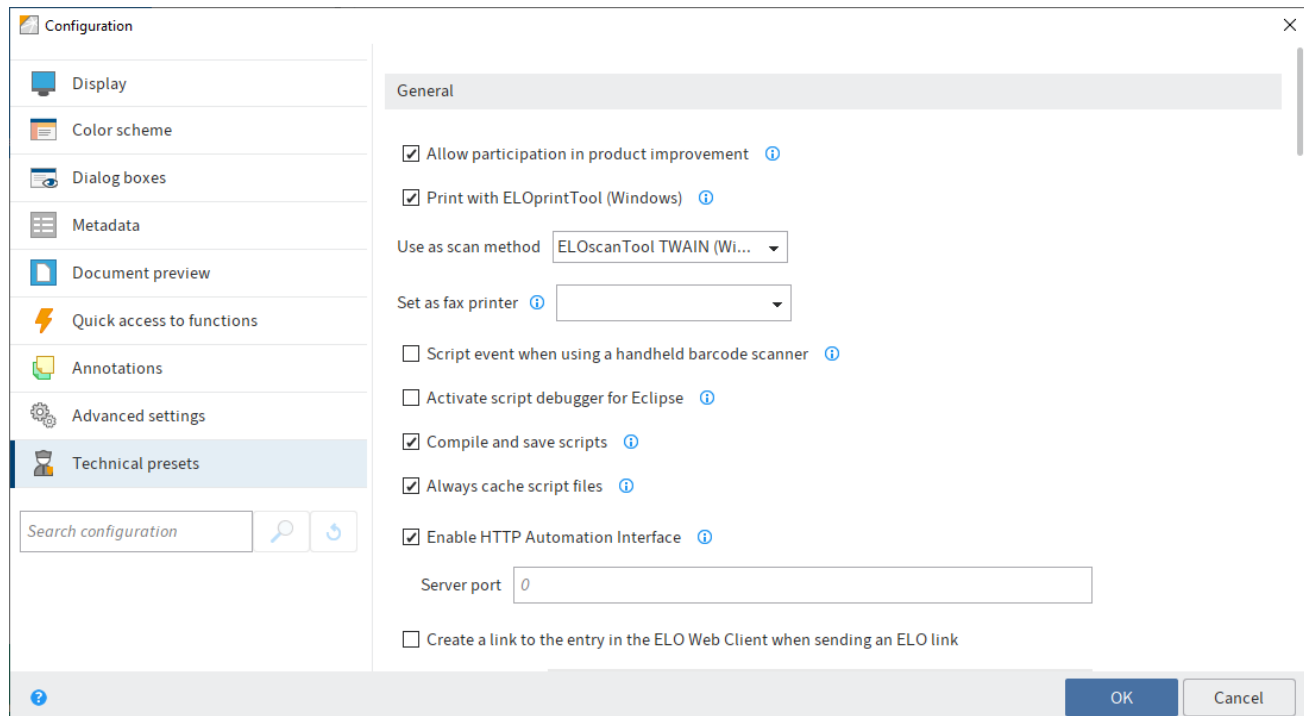
Choose from the following options:

- Confirm via dialog box
- Embed signature into document
- Create separate signature file

Behavior on double-click

In this area, you can define which action is performed when double-clicking a document in the *Repository*, *In use*, and *Search* work areas.

Configuration - Technical presets



The *Technical presets* area contains the settings for the following topics:

- General
- Display and refresh
- Log file
- Date formats
- Number formats
- Show or hide work areas
- Folder for document templates
- OCR (text recognition)

General

Allow participation in product improvement: Select this option to participate in ELO product improvement.

Print via ELOprintTool (Windows): Enable this option to print documents with the *ELOprintTool*.

Use as scan method: Select which scan method to use.

Please note

The *ELOscanTool* can only be used under Microsoft Windows and requires a 32-bit TWAIN driver.

Set as fax printer: To send a document as a fax, the document must be sent to a fax printer that processes the digital data and sends it to the recipient. Use this setting to specify which fax printer to use.

Barcode serial number: Enter a valid barcode serial number here if you want to use the barcode function at your workstation.

Information

This setting is only available to administrators.

Please note

Barcode serial numbers are unique to each workstation and may not be used multiple times.

Script event when using a handheld barcode scanner: If this option is enabled, the ELO Java Client sends a corresponding script event as soon as a handheld barcode scanner is recognized.

Activate script debugger for Eclipse: Select the *Activate script debugger for Eclipse* option to activate the script debugger for internal scripts. This will disable the internal script debugger (CTRL+ALT+D).

Compile and save scripts: Scripts are compiled once and then saved locally. This reduces the client execution time. If this option is enabled, you cannot use the JavaScript debugger.

Always cache script files: If this option is enabled, scripts are always stored in the local cache even if the document cache is cleared when you close the program. This reduces the client execution time.

Enable HTTP Automation Interface: Selecting the *Enable HTTP Automation Interface* option allows you to call scripting functions starting with the prefix *http* via the HTTP Automation Interface. To do so, you need to enter the corresponding port number in the *Server port* field.

The syntax must have the following format:

```
http://<server>:<port>/script/<script name>/?p1=<parameter value1>&p2=<parameter value2>
```

Server port: To call script functions via the HTTP Automation Interface, you need to enter the corresponding port number in the *Port* field.

Create a link to the entry in the ELO Web Client when sending an ELO link: If this option is enabled, a web link to the entry is embedded in the e-mail when sending an ELO link. This web link can also be used as an ELO link in the ELO Web Client.

Web Client URL: For the additional web link when sending an ELO link to work, you need to enter the ELO Web Client URL to the *Web Client URL* field.

Store cookies in integrated browser: If this option is enabled, ELO stored the internal browser cookies across sessions. Otherwise, the cookies are deleted when the client is closed.

Add references to full text database: If this option is enabled, references are included when adding to the full text database.

Autosave option for changed settings in minutes: This option can prevent Clipboard entries from being lost if ELO closes unexpectedly, for example. If the value 0 is configured, the settings are not saved until the session is ended.

Display and refresh

Cache refresh interval in seconds: Use this option to set the refresh interval of the *Repository* work area. Work areas and settings are updated at this interval.

Limit display in large folders: If you open an entry with the *Go to* function, only the respective entry is displayed in the specified folders. This option speeds up the load time, since the other contents of the specified folders are not loaded. In the *Object IDs* field, specify the object IDs of the folders that you want to apply the restriction to.

Storage duration of thumbnails in the cache: The ELO Java Client stores the created thumbnails to a local cache. In this area, you specify when to delete the cache. Choose from the following options:

- Delete when closing ELO
- Delete after 30 days
- Never delete

Clear document cache on closing: If this option is enabled, the temporary file folder will be emptied when you close the ELO Java Client.

Maximum number of documents in the In use work area: In this area, you specify how many documents can be checked out at the same time. This prevents too many external applications from being started since this can impact system performance. The default value is 20.

Maximum number of pages in OCR preprocessing: This is where specify the maximum number of pages per document to evaluate during OCR preprocessing. The default value is 20.

Start search immediately when clicking a search favorite: The *Save search* and *Search favorites* functions on the *Search* tab enable you to save search favorites and use them repeatedly. Enable this option to immediately start the search when clicking a search favorite. If this option is disabled, the search favorite is added without starting the search.

Log file

The log file contains the automatic protocol of all or certain processes of an application.

You can make the following settings for the log file:

Write log file: Select this option to write a log file.

Open log file: Open the log file for viewing.

Send log file: Attach a log file as a TXT file to an e-mail.

Log file path: Define the storage location for the log file.

Information level: Define how detailed you want the information in the log file to be (default, script development, debug, or network debug).

Information

You can only make changes to the log file if there is no logger entry in the registry.

Date formats

Possible date and time formats: Expand this list to show the variables for the configuration of the date and time formats.

Preview: This field shows what the date format would look like with the current settings.

Format for date and time entries: Specify the format for the date and time entries here. The format used is displayed as an example in the *Preview* field. The default setting is *Use standard Java date formats*.

Please note

If nothing is displayed in the *Preview* display field, the date entries will not be displayed in the client either.

Date format: If you have selected the *User-defined* option, you can choose a predefined date format in the *Date format* field or generate your own date format from the variables displayed under *Date and time format options*.

Time: If you have selected the *User-defined* option, you can choose a predefined time format in the *Time* field or generate your own time format from the variables displayed under *Date and time format options*.

Date format that should also be accepted for entries in ELO: If you have selected the *User-defined* option, you can select or create an additional date format that is also valid in ELO in the *Date format that should also be accepted for entries in ELO* field.

Replace date in tables with "Yesterday", "Today", and "Tomorrow" as required: Select this option to replace the date with *Yesterday*, *Today*, or *Tomorrow* as appropriate.

First weekday in the calendar: Use the drop-down menu to set the first day of the calendar week in ELO. The default value is *Monday*.

First calendar week: Use the drop-down menu to set when the first calendar week should start. With the default settings, the first calendar week starts on January 1.

Number formats

Separator for number entries: Specify the separators used for numbers here. The default setting is *Use standard Java separators*.

Thousands separator: If you have selected the *User-defined* option, you can enter a separator to mark numbers higher than one thousand in the *Thousands separator* field.

Decimal separator: If you have selected the *User-defined* option, you can enter a separator for numbers with decimal places in the *Decimal separator* field.

Show or hide work areas

You can hide or show the *Intray*, *Clipboard*, *Tasks*, *In use*, and *Search* work areas here.

Folder for document templates

Path: Define in which folder the document templates will be stored in ELO.

OCR (text recognition)

OCR recognition: Specify here whether you want to perform OCR in fast or detailed (but slower) mode.

Filter: Use this field to filter the *Available languages* column. The column is updated as soon as you enter a character.

Reset filters: Deletes the current filter from the *Filter* field. All available languages are displayed.

Available languages: From this list, select the languages for text recognition that will be used to analyze the documents in ELO.

The OCR service and languages are only available if an OCR instance has been installed.

Selected languages: In this list, you can see which languages have been selected for text recognition.

Enable roles

Roles are used to grant users additional rights in ELO. For example, a role can grant a user membership to the *Accounting* group. You do not need the additional group rights for your everyday work, so you can enable them as and when required. You need to enable the role to get the corresponding rights in the client.

You can also enable the roles manually when you log on. This dialog box opens after you sign in to ELO.

Change password

You can change your password as often as you want. 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.

Assign substitute

You can create substitutes and activate them immediately or later on.

This way, you can prevent workflow tasks from escalating, such as when you are absent.

For more information, refer to the Important actions in detail chapter.

Accept substitution

This function 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.

The screenshot shows the ELO Java Client interface. At the top, there is a dark blue header with a user menu icon (a blue person silhouette) highlighted with a red box, followed by the name "Anderson" and a dropdown arrow. To the right is a small profile picture of a woman. Below the header, there are two tabs: "News" (active) and "Most recently used". A gear icon for settings is visible on the right. The main content area is divided into two columns. The left column is titled "Filter" and includes a "New since" section with radio buttons for "Today", "Yesterday", "One week" (selected), and "One month". The right column is titled "Current hashtags" and shows "#Order" and "Substitution" (highlighted with a red box). Below "Substitution" is the text "I am substituting for Cole". At the bottom of the right column, there is a link for "My recently started workflows".

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.

Additional information:

- Assign substitute
- Show substitution tasks
- View substituted user's In tray

Edit profile

You can edit your profile.

You can edit your profile in the following ways:

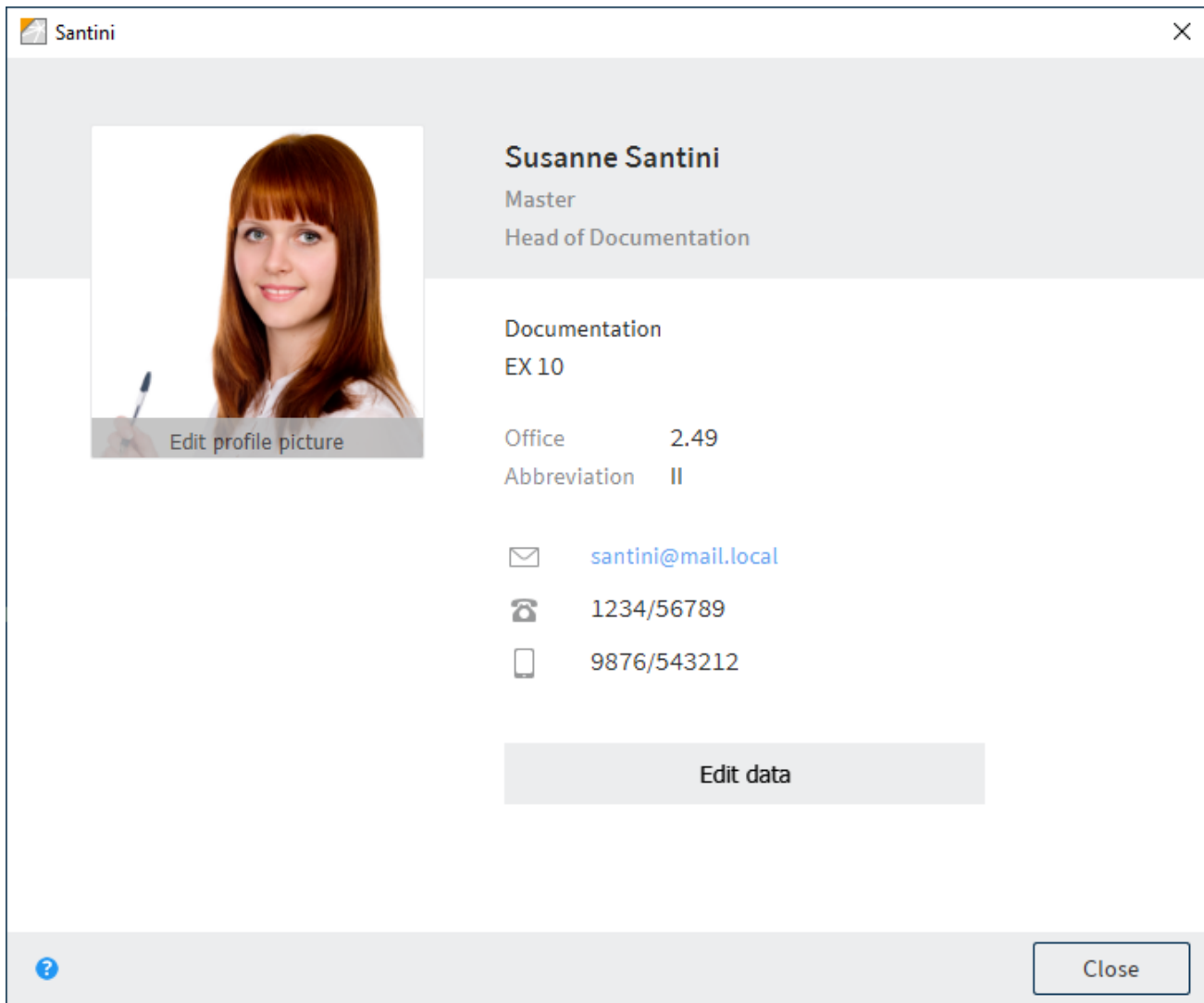
- On the ribbon, select *User menu [your name] > Edit profile*.
- In the *My ELO* work area, select the *Settings* button (gear icon) > *My profile* (person icon at the top right).
- Click your user name or profile image in the feed.

Information

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

Information

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



In the *Profile* dialog box, you can edit your profile picture and profile data. Select either *Edit profile picture* or *Edit data*.

Edit profile picture

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

Select picture: Use *Select picture* to 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.

Delete picture: You can delete your profile image. The dialog box remains open, but editing mode is closed.

Save: You can apply the changed profile image. The dialog box remains open, but editing mode is closed.

Cancel: Undo the changes. The dialog box remains open, but editing mode is closed.

Edit data

Select *Edit data* to edit your profile data. You can enter and edit data in the fields provided.

You will find the following buttons below the input fields. You may need to scroll down.

Save: Applies the changed profile data. The dialog box remains open, but editing mode is closed.

Cancel: Undo the changes. The dialog box remains open, but editing mode is closed.

Close dialog box

Close: Exit the dialog box. Any unsaved changes will be lost.

About

This 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.

User feedback

This is where you can write feedback on the program and send it to ELO. You can enter an e-mail address if you want. This e-mail address will be used for enquiries.

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

Help

This launches the ELO in-program help function. This is where you will find the documentation for the ELO Java Client.

Active processes

Use this function to open an overview of processes running in the background. This includes, e. g. import and export processes.

You can view a detailed log for each process. You can save the log as a CSV file (comma separated values).

You can cancel current processes and select *Go to* to go straight to the respective entry in the *Repository* work area.

You can remove one or all finished processes from the process overview.

Close

Close the ELO Java Client with this function.

Workspaces

Workspaces are workspaces 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.

The screenshot shows the ELO Java Client interface for the 'Media management' workspace. The ribbon at the top contains buttons for 'Show as tile', 'Search space', 'New loan', 'New book', and 'New DVD'. A sidebar on the left displays a filter tree for 'Media' (All books, By genre, By language, By author, By status, All DVDs) and 'Organize' (Loan history, All users). The main area shows a table of books with columns: Title, Author, Status, Book type, ISBN, Signature, Genre, Publisher, and Year. A table view is selected at the top right. Red callout boxes 1-8 point to various UI elements: 1 (New), 2 (Search space), 3 (New loan), 4 (Table view), 5 (Edit icon), 6 (Related items icon), 7 (Edit workspace button), and 8 (Filter tree).

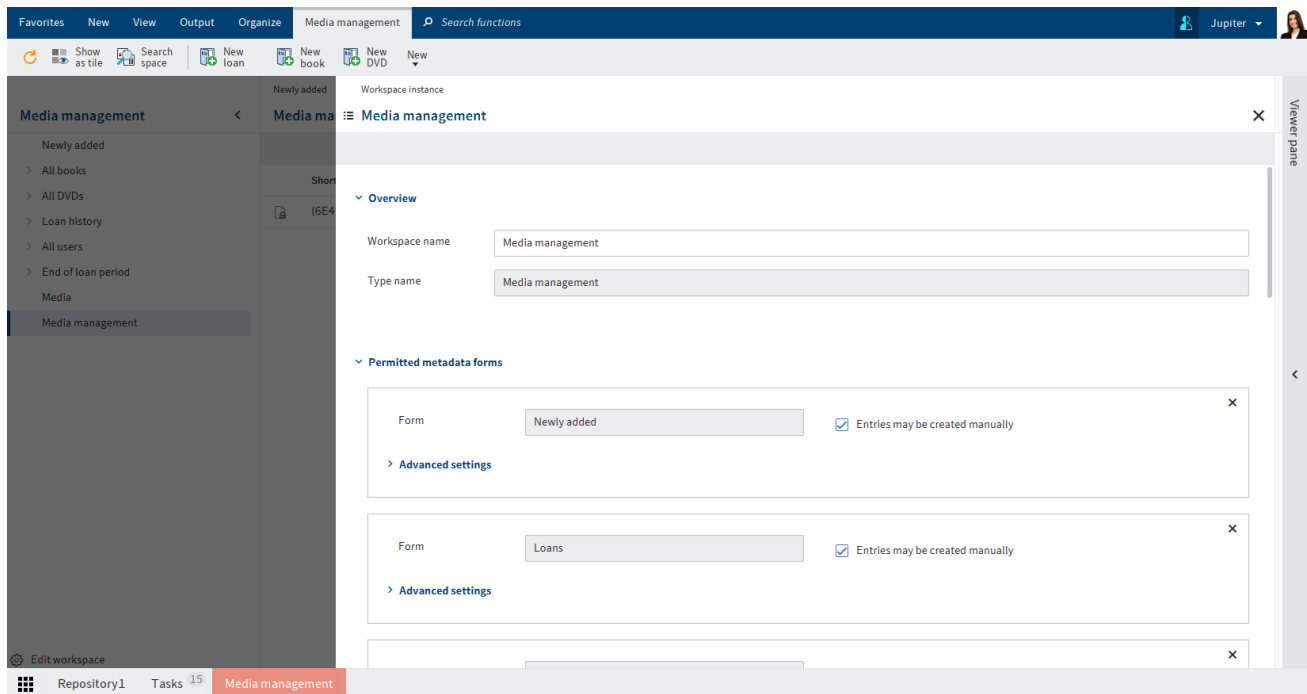
Title	Author	Status	Book type	ISBN	Signature	Genre	Publisher	Year
101 Dalmatians	Justine Korman	on loan	Hardcover	307001164	H27	Children's literature	Golden Books Pub...	1996
11th Hour	Bradley Warshauer	available	Pocket book	786015276	G46	Thriller	Pinnacle Books	2003
14,000 Things to Be Happy About	Barbara Ann Kipfer	on loan	Hardcover	894903700	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

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 by the administrator and are customized.
- 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



You can edit the workspace here. In the [ELO Workspaces](#) documentation, you can find more information about the following:

- Overview
- Roles
- Permitted metadata forms
- Views
- Filter trees





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.

Basic settings
Metadata forms
Views
Filter trees
×

 Delete workspace

You can delete the workspace.

'Workspace members' area

You have the following options:

Add user/group

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.

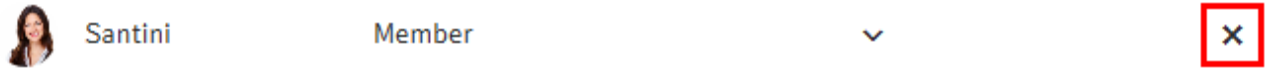
When you add workspace members and groups, a feed post is automatically created and is displayed in *My ELO*.

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.

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 Warshauer	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
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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:

The screenshot shows the ELO Java Client interface. On the left, a list of books is displayed with columns for Title, Author, and Status. The book 'A Density of Souls' by Christopher Rice is highlighted. On the right, the 'Metadata' tab is active, showing fields for Title, Year, Genre, Language, and Keywords. The title is 'A Density of Souls', the year is '2001', and the genre is 'Mystery'.

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...	reserved
A Judgement in Stone	Ruth Rendell	reserved

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.

The screenshot shows the ELO Java Client ribbon with the following functions: Favorites, New, View, Output, Organize, Event planning, and Search functions. Below the ribbon, there are buttons for Scan, New folder, Insert, Start workflow, and 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.

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 Books dashboard

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 search the entries. Enter a search term and press the ENTER key to start your search. Search hits are highlighted in yellow.

Book

Science fiction

Language: English, German ▾ ✕

Book type: Hardcover ▾ ✕

Add filter ▾

37 available | 38 reserved | 28 on loan

Title	Author	Status	Book ytppe	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. The set quick filters remain active in other filter levels as well.

Book

All books

Add filter **627**
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.

Book

All books Table ▾

🔍

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	●
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.

🔍 📡 🏠 📄

Create a post

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.

Kanban board

The screenshot shows a Kanban board for 'Speculative fiction' books. The board is organized into three columns: 'available' (20 items), 'reserved' (9 items), and 'on loan' (23 items). Each card displays the following information:

Column	Item 1	Item 2	Item 3
available	Title: 2061: Odyssey Three Author: Arthur C. Clarke Publisher: Del Rey Books Signature: O11 Genre: Science fiction	Title: Deadly Sleep Author: John Applegate Publisher: Pinnacle Books Signature: O14 Genre: Science fiction	Title: Jurassic Park Author: Michael Crichton Publisher: Ballantine Books Signature: O29 Genre: Science fiction
reserved	Title: Demon Night Author: J. Michael Straczynski Publisher: Berkley Pub Group Signature: O15 Genre: Science fiction	Title: One Tree (Donaldson, Stephen R. Second Chronicles of Thomas Covenant, Bk. 2.) Author: Stephen R. Donaldson Titre: Tantras (Forgotten Realms: Avatar Trilogy, Book 2) Auteur: Richard Awlinton Maison d'édition: Wizards of the Coast Signature: V62 Genre: Science fiction	Title: The Dolphins of Pern Author: Anne McCaffrey
on loan	Title: Breakfast of Champions Author: Kurt Vonnegut Publisher: Dell Publishing Company Signature: V49 Genre: Science fiction	Title: Chroniques martiennes Author: Ray Bradbury Publisher: Gallimard Signature: I29 Genre: Science fiction	Title: Das Meer und kleine Fische. Author: Terry Pratchett Publisher: Heyne Signature: O3 Genre: Science fiction
	Title: Les Thanatonautes Author: Bernard Werber		Title: Deus Irae Author: Philip Kindred Dick

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 ▾

available 20

Title:	2061: Odyssey Three
Author:	Arthur C. Clarke
Publisher:	Del Rey Books
Signature:	O11
Genre:	Science fiction

Title:	Deadly Sleep
Author:	John Applegate
Publisher:	Pinnacle Books
Signature:	O14
Genre:	Science fiction

Title:	Jurassic Park
Author:	Michael Crichton

Book

< 2061: Odyssey Three

▼ **Media data**

Status
 ☰

Media ID

Signature

▼ **Media classification**

Title

Year

Genre
 ☰

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

All books

available	463	reserved	421
Title:	2061: Odyssey Three	Title:	11th Hour
Author:	Arthur C. Clarke	Author:	Bradley Warshauer
Publisher:	Del Rey Books	Publisher:	Pinnacle Books
Signature:	O11	Signature:	G46
Genre:	Science fiction	Genre:	Mystery

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

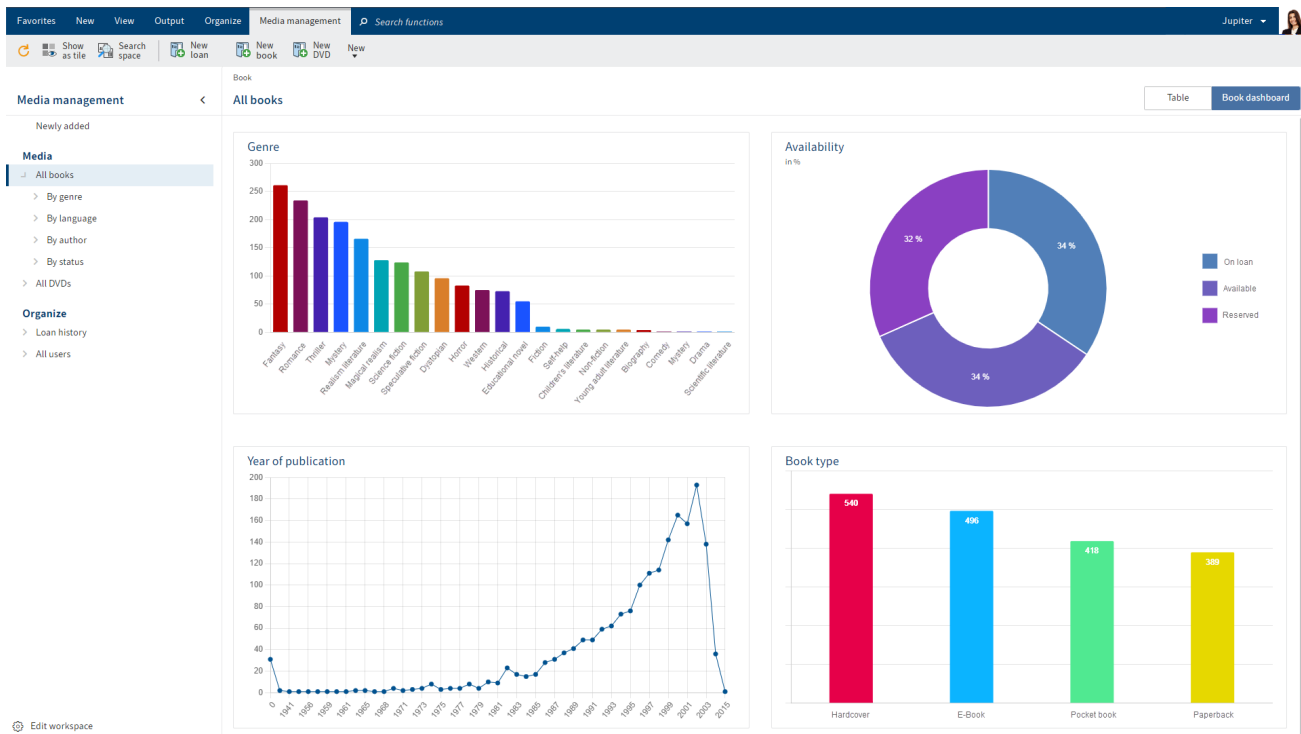
Search, RSS, Filter, List icons

Create a post

ELO Service created a new folder.
Apr 28, 2022, 10:09 AM
[Comment](#)

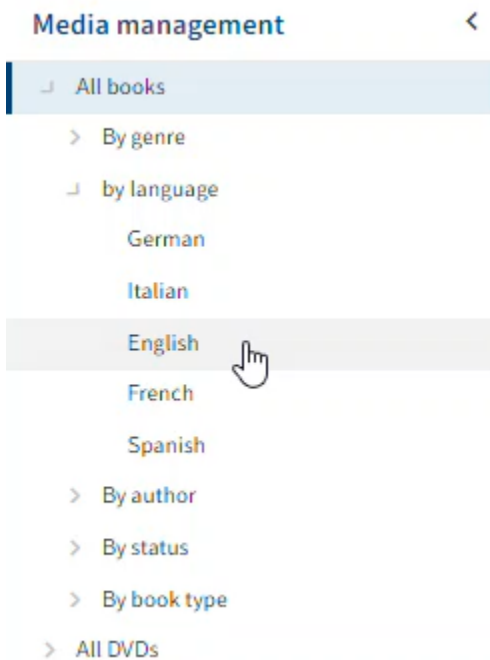
You can enter a feed post. The feed works as described in the chapter Feed.

Dashboard

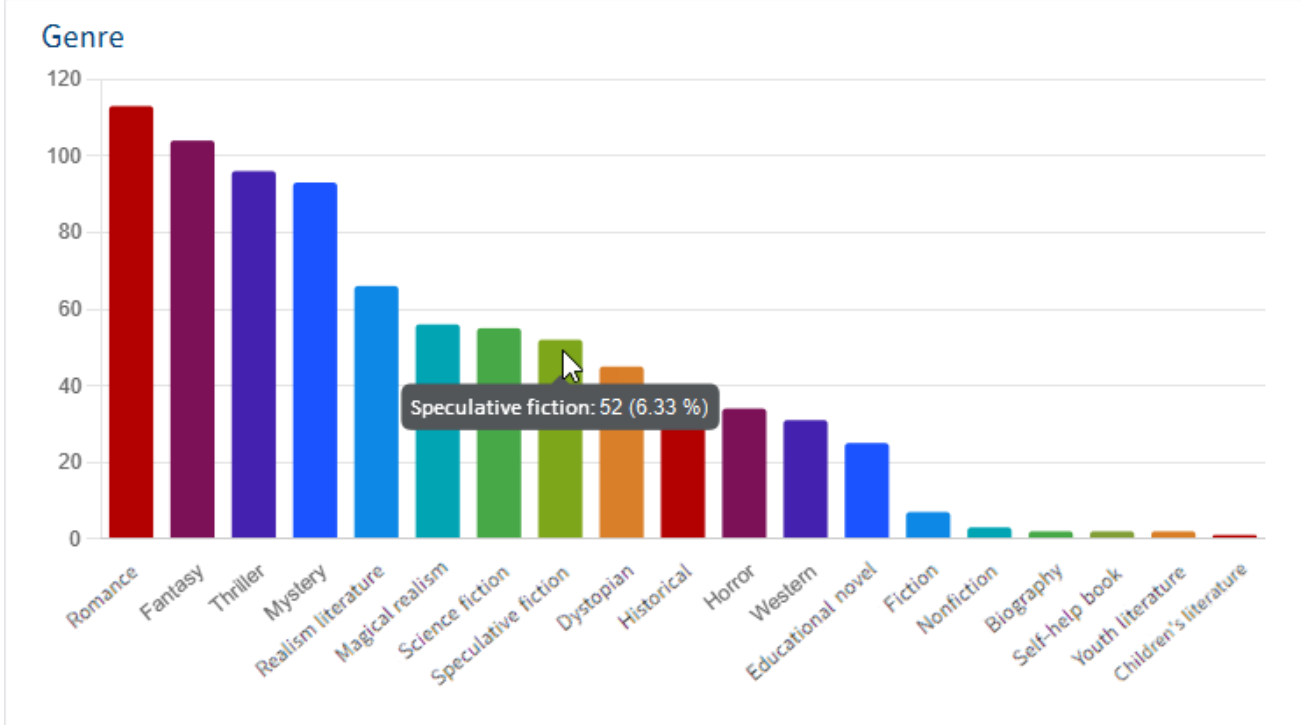


Workspace entries can be visualized in various ways in a dashboard. The types of visualization available depend on the administrative settings.

You have the following options:



You can filter the dashboards.



You can view details about dashboards by clicking on them.

Calendar

The screenshot shows a web application interface for library management. At the top, there's a navigation bar with tabs like 'Favorites', 'New', 'View', 'Output', 'Organize', 'Media management', and 'Search functions'. Below this is a toolbar with icons for 'Show as tile', 'Navigation', 'New loan', 'New book', 'New DVD', and 'New'. The main content area is titled 'Media management' and 'Loans', with a sub-section for 'Loan history'. A calendar for 'Juli 2024' is displayed, showing book titles assigned to each day of the month. For example, on Monday the 1st, 'The Middle Stories' and 'The Rosewood Casket' are listed. On Tuesday the 2nd, 'Dragonflight (Dragonriders o...' and 'Water For Elephants' are listed. The interface also includes a sidebar with 'Medien' (All books, By genre, By language, By author, By status, All DVDs) and 'Management' (Loan history, End of loan period, All users) sections. A 'Workspace bearbeiten' button is visible at the bottom left.

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.

Create workspace

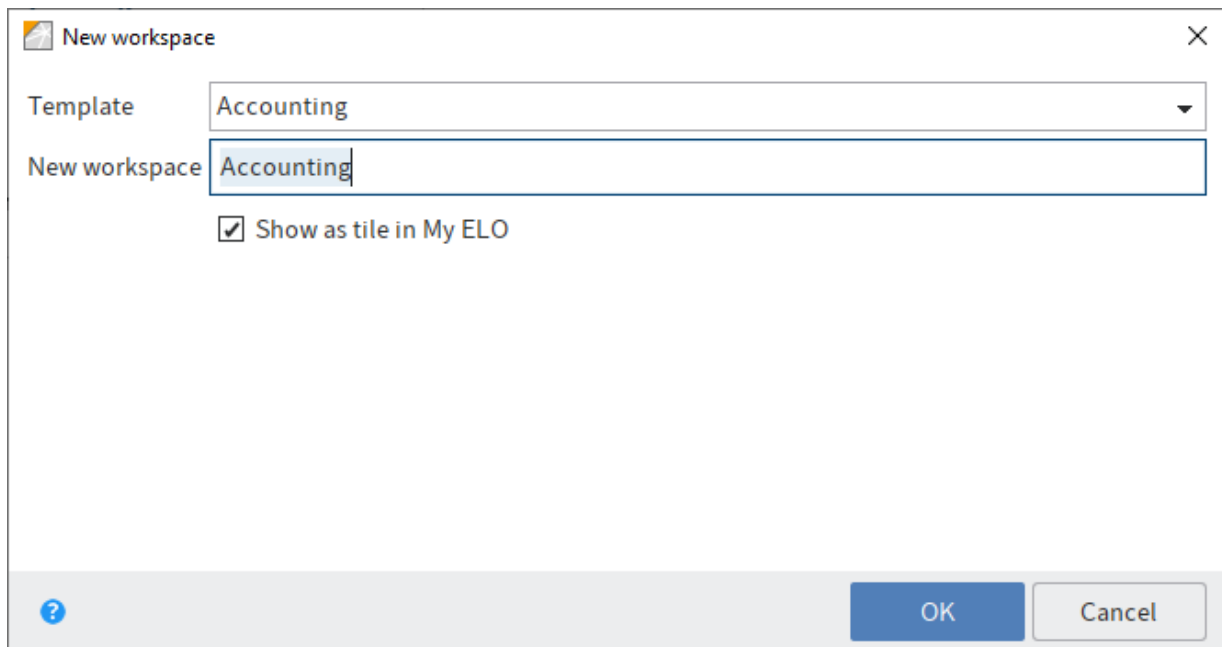
You can create new workspaces.

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*.



The screenshot shows a dialog box titled "New workspace". It has a close button (X) in the top right corner. The "Template" dropdown menu is set to "Accounting". Below it, the "New workspace" text field contains the text "Accounting". There is a checked checkbox labeled "Show as tile in My ELO". At the bottom right, there are two buttons: "OK" and "Cancel". A help icon (?) is visible in the bottom left corner of the dialog.

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.

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

4. Complete the fields as required.

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
-

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.

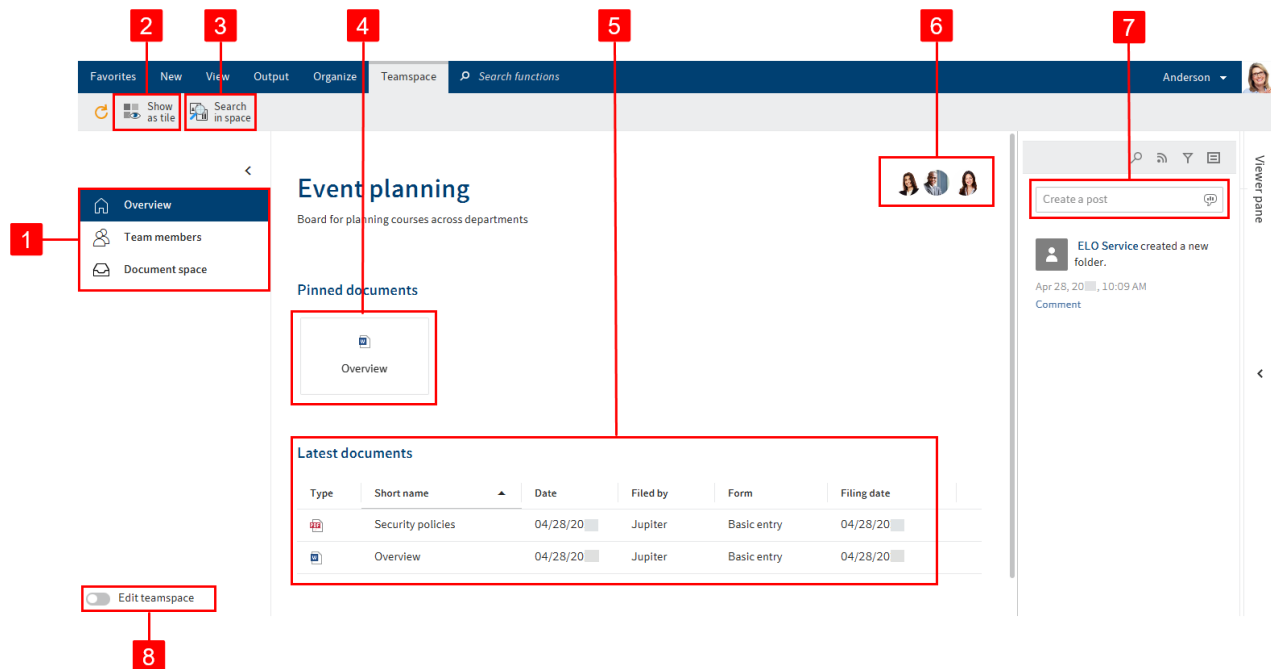
The permissions you have in a teamspace depend on the role you have been assigned by the administrator.

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.

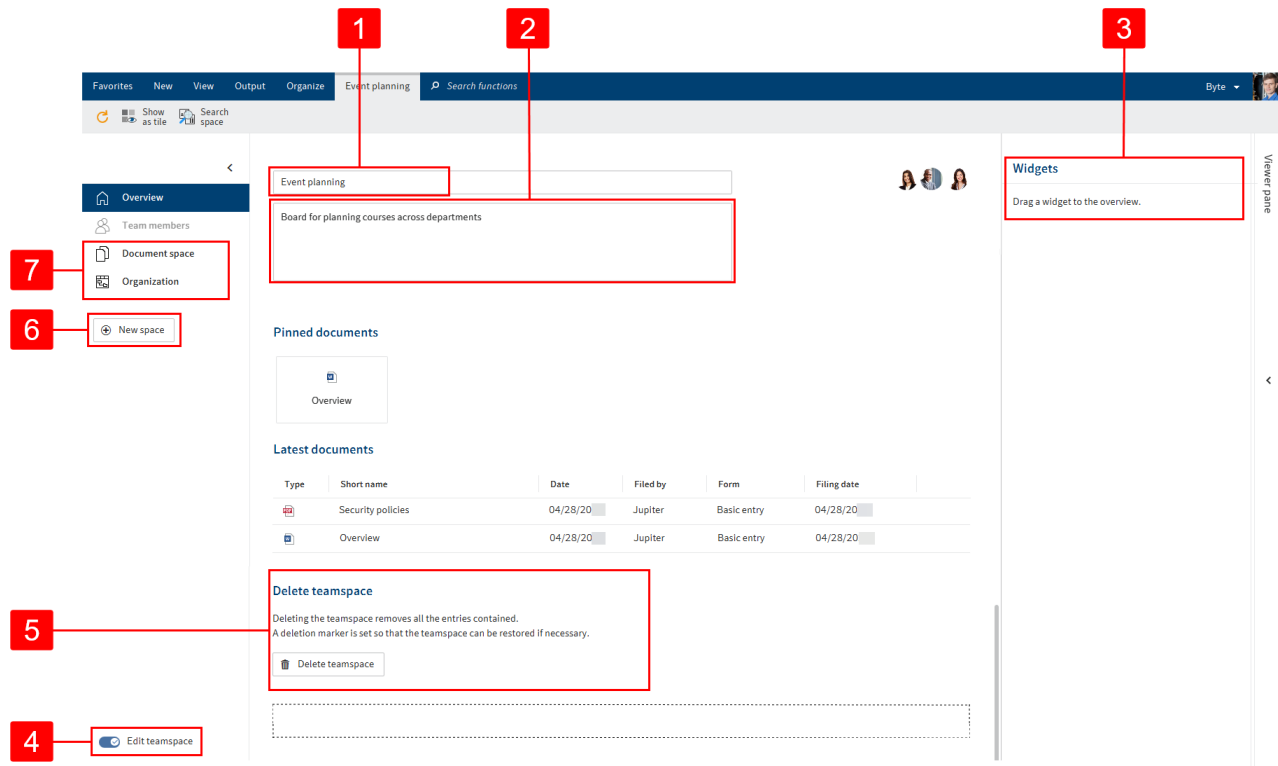
5 Latest documents. You can open one of the latest documents. The Document space chapter explains how to insert a document in a teamspace.

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.

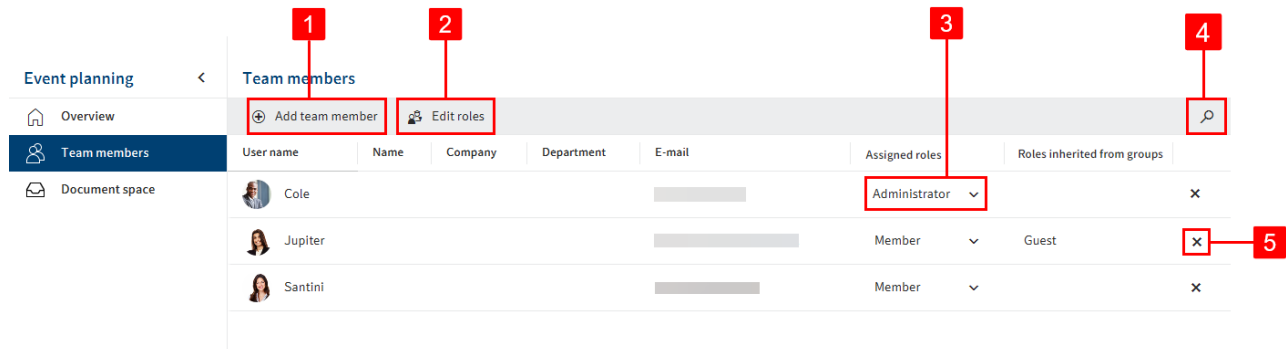
5 Delete teamspace: Deleting the teamspace removes all the entries contained. A deletion marker is set so that the teamspace can be restored by an administrator if necessary.

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.

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 members can also be named administrators. Administrators have all the permissions to the teamspace and its contents.
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.
Member	Members can create, edit, move, and delete contents in the teamspace.
Guest	Guests can only read contents.

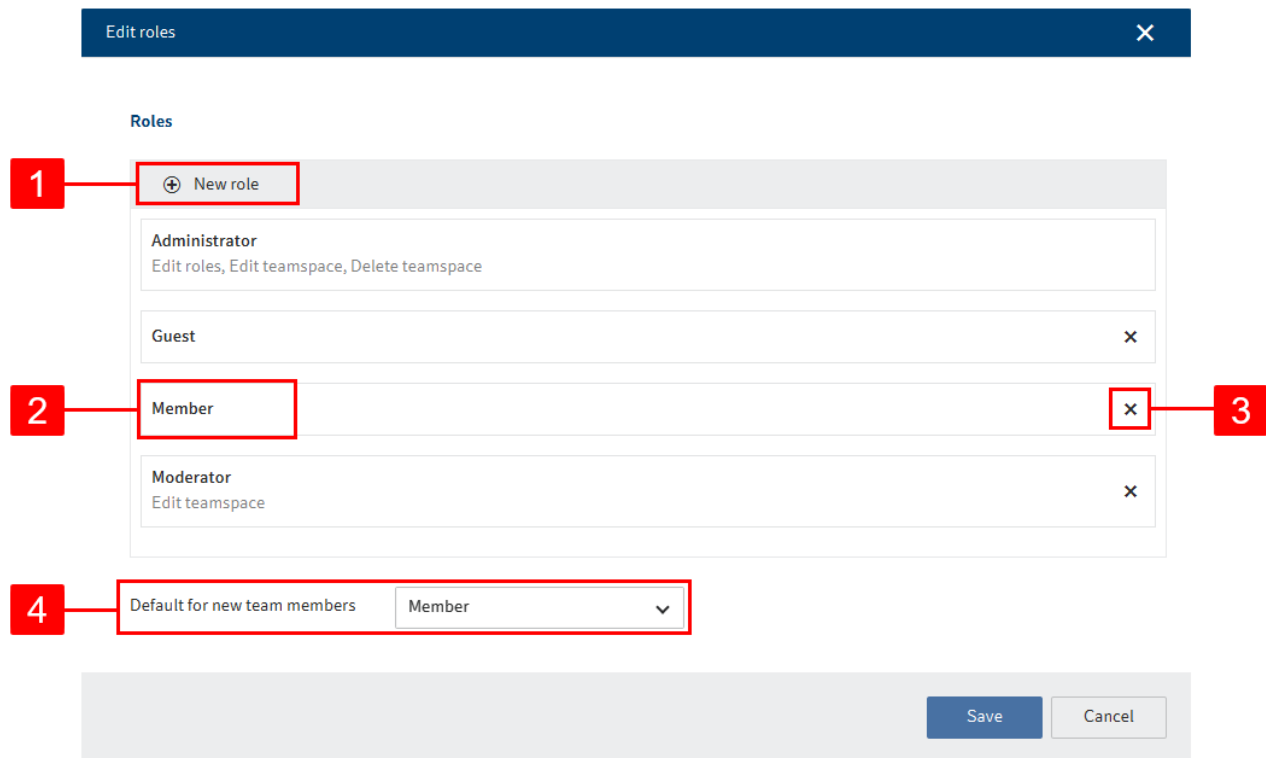
The roles can be edited.

Edit roles

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

Method

Select *Edit roles*.



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

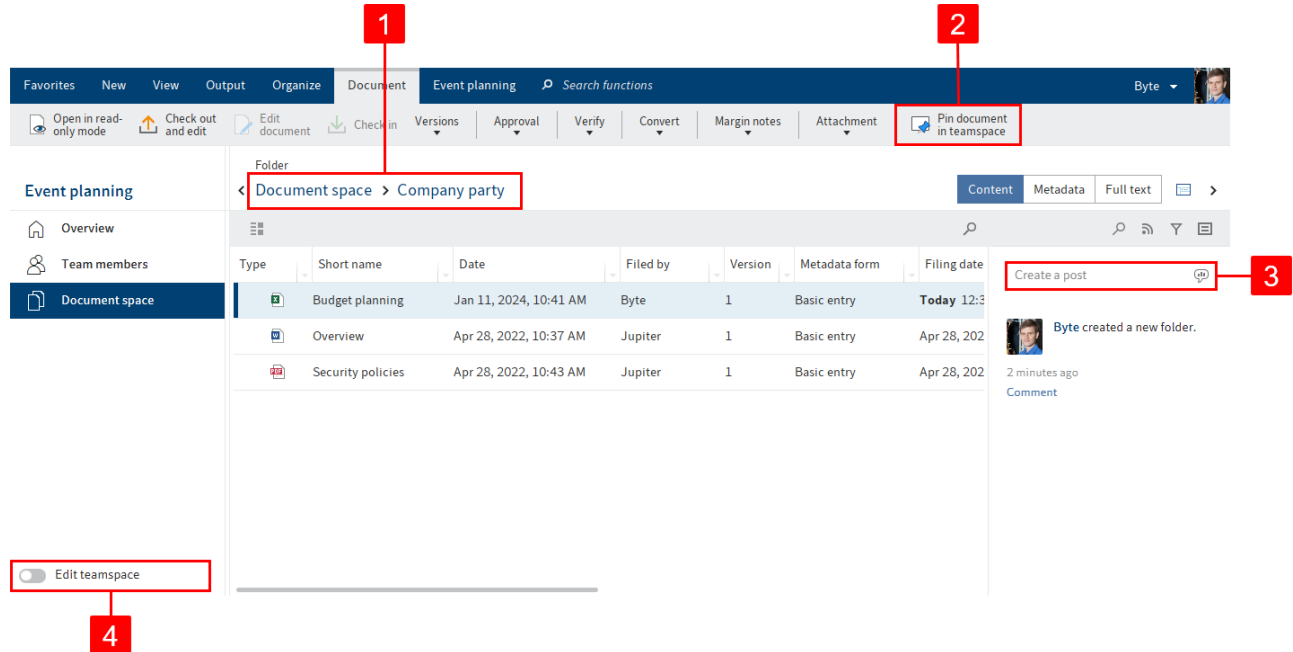
- 1 Add new role: This is where you define the rights for the role members.
- 2 Edit existing role
- 3 Delete role
- 4 Set default for new team members: You can specify in the drop-down menu which role newly created team members are assigned by default. This role can still be changed after creating a 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:

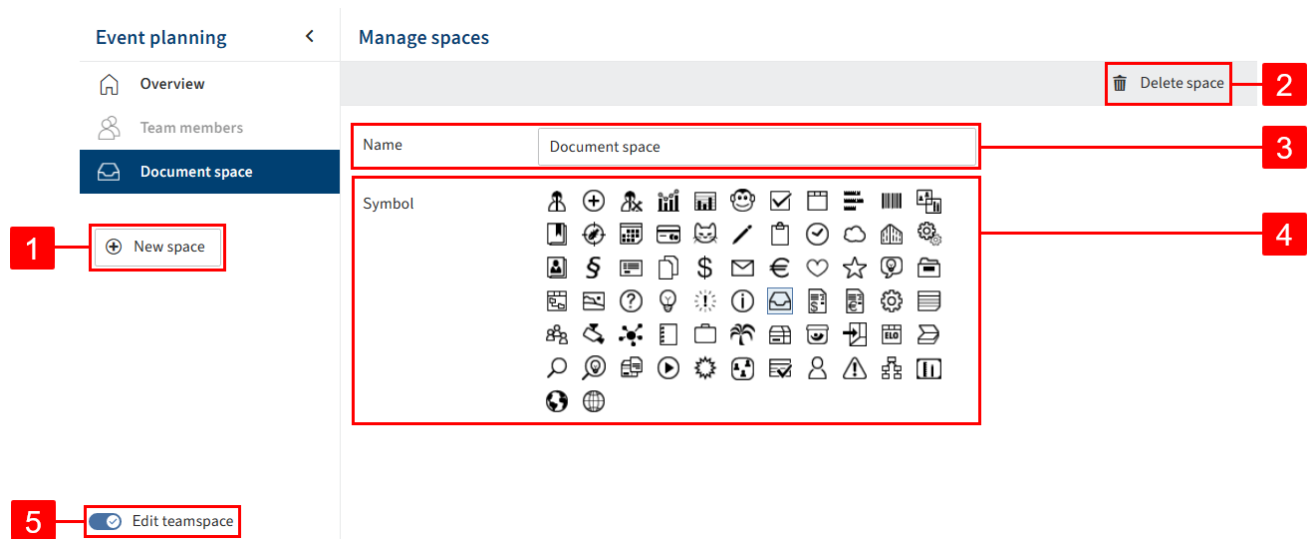
1 Breadcrumb navigation: If you are in a folder, you can go back to a parent folder. In this case, you need to select the name of the folder in the breadcrumb navigation.

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.

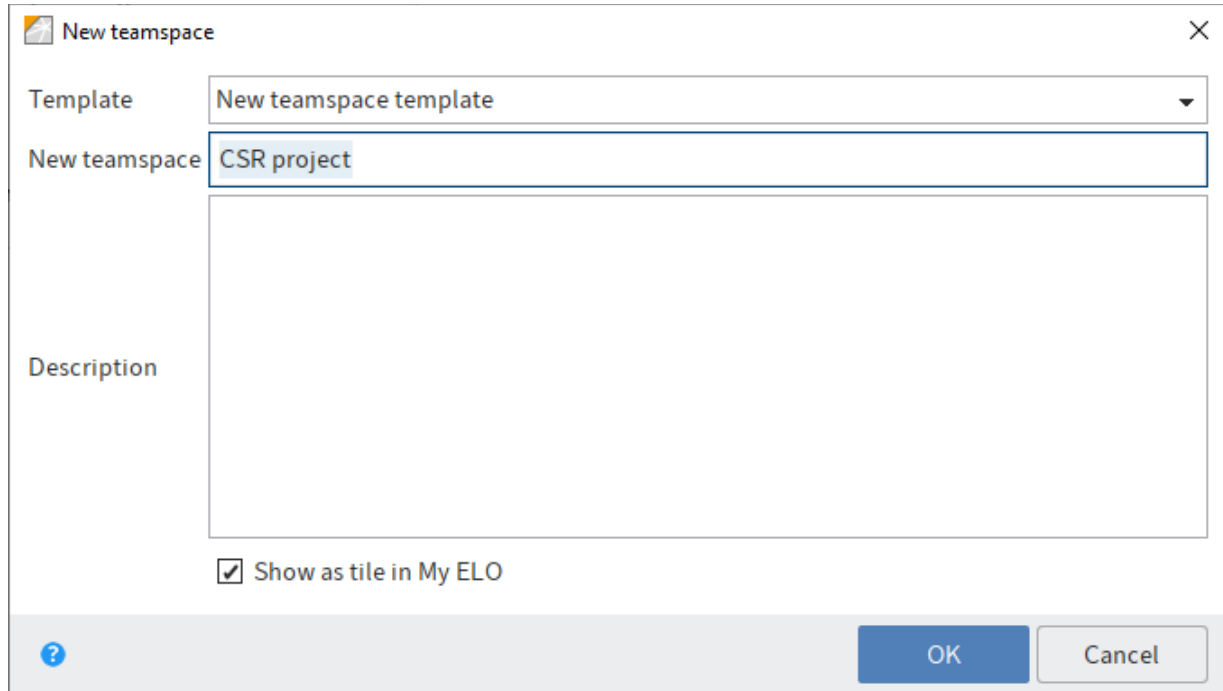
Requirements

The administrator will already have created teamspace templates.

Method

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

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



The screenshot shows a dialog box titled "New teamspace". It has a close button (X) in the top right corner. The dialog contains the following elements:

- Template:** A dropdown menu with "New teamspace template" selected.
- New teamspace:** A text input field containing "CSR project".
- Description:** A large, empty text area.
- Show as tile in My ELO:** A checkbox that is checked.
- Buttons:** "OK" and "Cancel" buttons at the bottom right.
- Help:** A question mark icon at the bottom left.

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

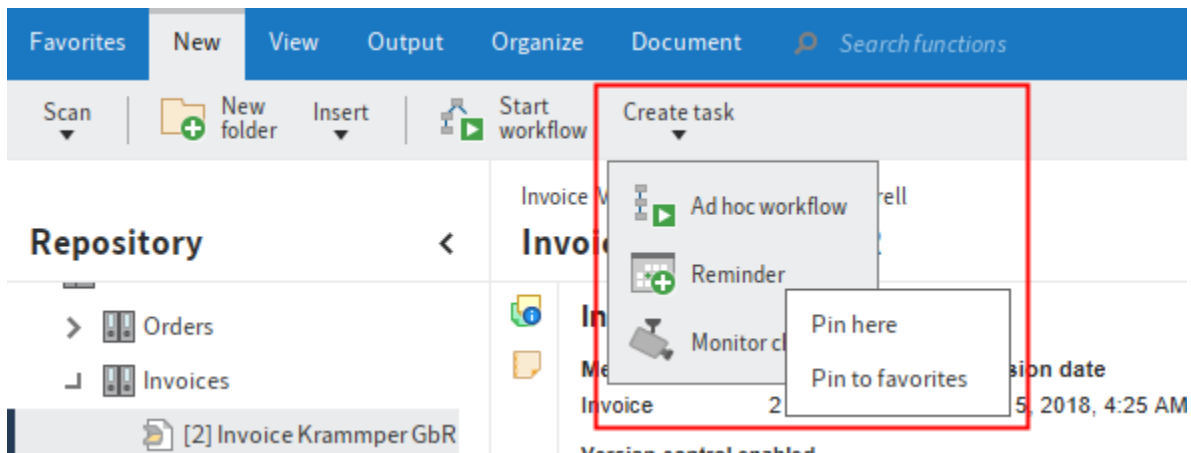
'Favorites' tab

With the default settings, the *Favorites* tab contains several important functions that you can access quickly. You have the following options for adding functions to the *Favorites* tab:

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

In the context menu on the ribbon

You can add functions to the *Favorites* tab using the context menu.



Right-click the desired function. The context menu opens. Select *Pin to favorites* in the context menu. The function now appears on the *Favorites* tab.

To remove a function from the *Favorites* tab, select *Unpin from favorites* in the context menu. The function is no longer displayed on the *Favorites* tab. You will now find the function in the corresponding group tab.

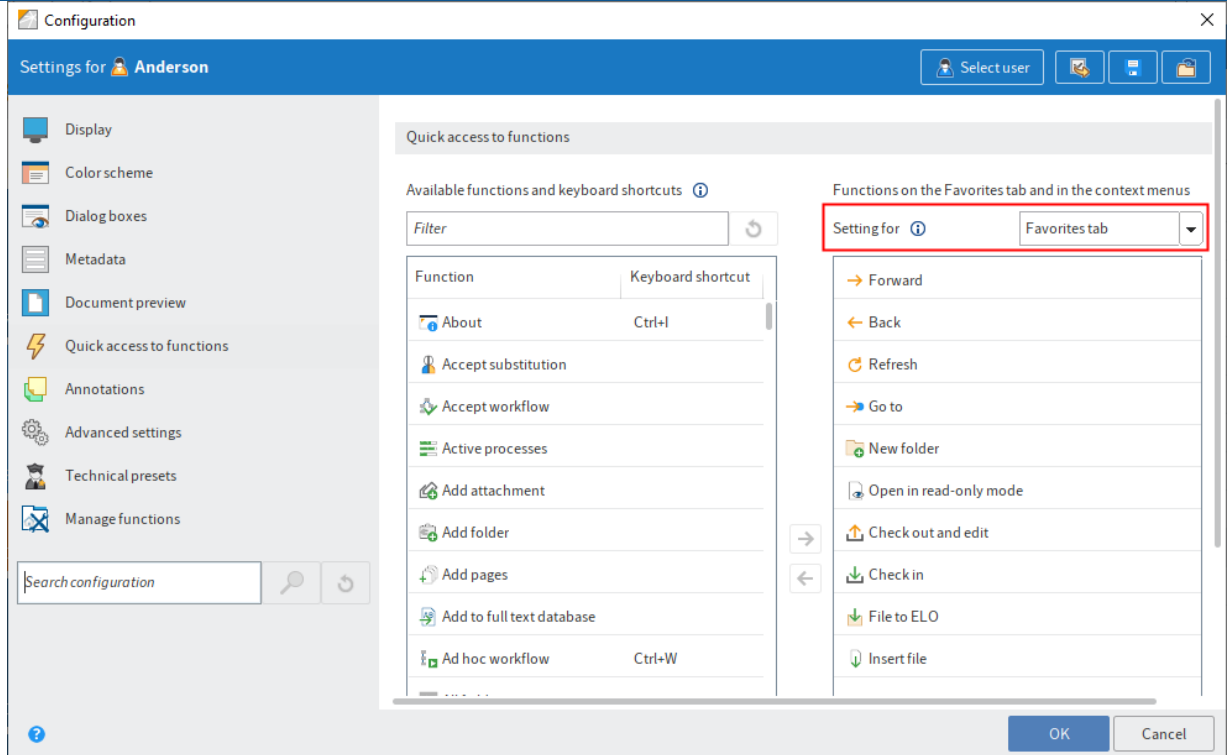
In the configuration

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

Information

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

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



The *Quick access to functions* area opens. The settings for the *Favorites* tab are displayed.

The *Existing functions and keyboard shortcuts* list contains an overview of all available functions in ELO. The *Functions on the Favorites tab and in the context menus* list contains the functions currently visible on the *Favorites* tab.

2. To add a function to the *Favorites* tab, select the function in the left-hand column and select the arrow pointing right between the two columns.

To remove a function from the *Favorites* tab, select the function in the right column and select the arrow pointing left between the two columns.

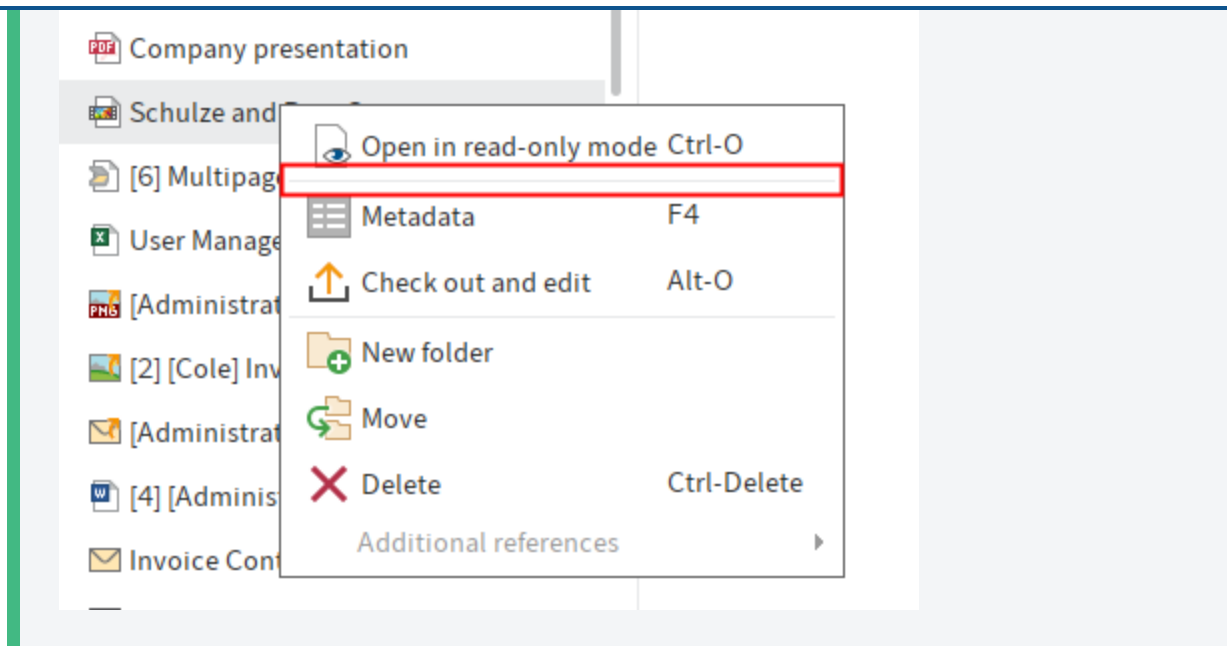
Information

You can change the order of functions on the *Favorites* tab with the arrow buttons to the right of the *Settings for* column.

3. To apply the changes, select *OK*.

Information

For better visual clarity, you can insert a separator line between the functions in the menus. Select the function *Separator line* from the list on the left.



'New' tab

Scan to repository

Available in: *Repository work area > Ribbon > New > Scan*

This function enables you to scan documents straight to the *Repository work area*. After scanning, you must enter metadata for the document. The scanned document is filed to the last selected folder in ELO.

Please note

You need to have a compatible scanner installed and selected.

Attach to back

Available in: *Repository work area > Ribbon > New > Scan*

This function attaches pages to the end of a TIFF document that was already filed to ELO. You need to scan the pages.

Please note

You need to have a compatible scanner installed and selected. To check whether a scanner is installed, select the *Select scanner* button under *Ribbon > New > Scan*.

Attach to front

Available in: *Repository work area > Ribbon > New > Scan*

This function attaches pages to the front of a TIFF document that was already filed to ELO. You need to scan the pages.

Please note

You need to have a compatible scanner installed and selected. To check whether a scanner is installed, select the *Select scanner* button under *Ribbon > New > Scan*.

Select scan profile (drop-down menu)

Available in: *Ribbon > New > Scan*

Use the drop-down menu to select a scan profile for the next scan. Create new scan profiles with the *Scan profiles* function.

Scan profiles

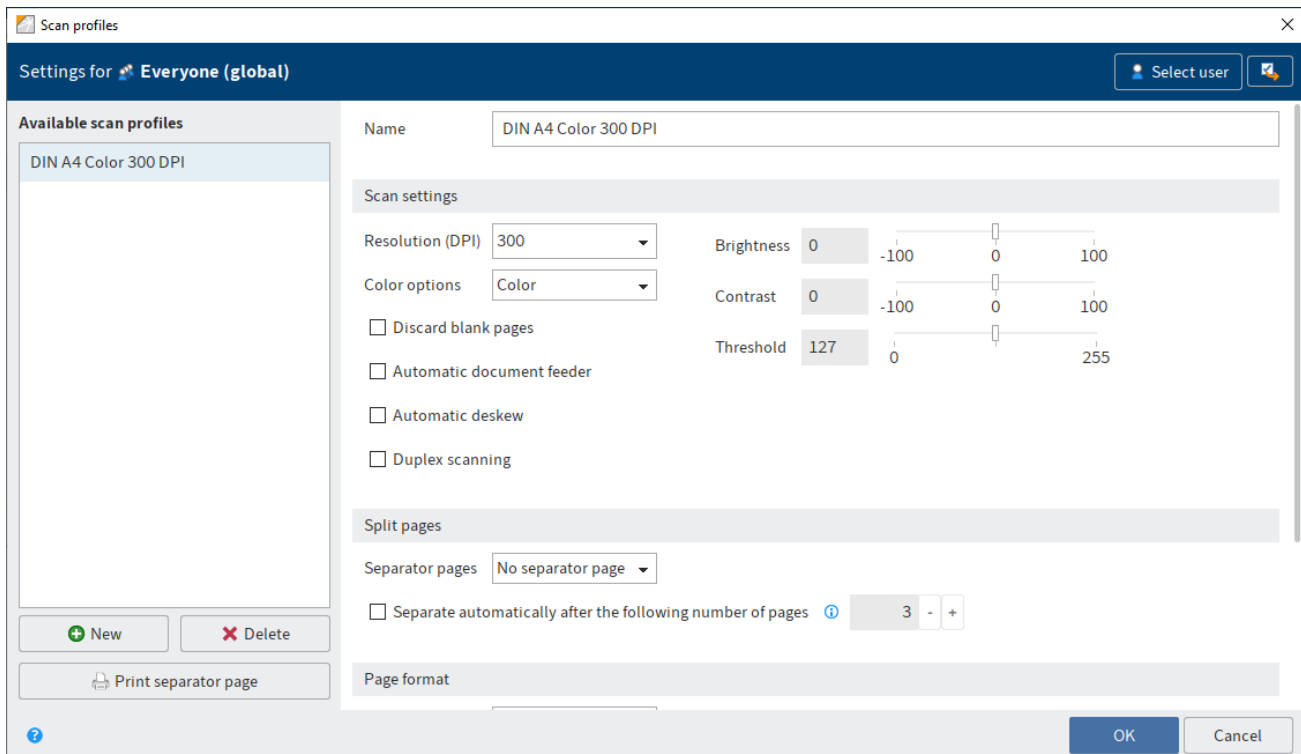
Available in: *Ribbon > New > Scan*

Use this function to open the *Scan profiles* dialog box. In it, you can define profiles for scanning documents. A scan profile enables you to define settings, such as which resolution to use or which format to store the scanned documents in. This way, you can set up a custom scan profile for each source document.

Scan profiles are used to take the specific properties of documents into account, such as texts, color images, high-resolution images, different formats, etc.

Information

You will also find the *Print separator pages* function in the *Scan profiles* dialog box. You can find more information about this function in the *Join (separator pages)* section.



You can make the following settings:

Available scan profiles

Under *Available scan profiles*, you can see all scan profiles available to the selected user or group.

New: Creates a new scan profile

Delete: Deletes the selected scan profile

Print separator page: Opens the *Print separator page* dialog box. In the *Print separator page* dialog box, select whether a separator page will be printed with horizontal or vertical bars.

You need a separator page when you scan multiple documents one after the other. A separator page shows the transition to a new document and ensures that the documents are filed individually to the *Intray* work area after scanning.

Name of the profile

Name: Use the *Name* field to enter the name of the selected scan profile.

Scan settings

The following settings apply to the scan process. The settings can only be edited if you have created a new profile or selected an existing profile.

Information

The settings are not supported by all scanners.

Resolution in dpi: In the *Resolution in dpi* drop-down menu, you can select the resolution (dpi = dots per inch) for the scan process.

Color options: In the *Color options* drop-down menu, select whether you want to create a color, black/white, or grayscale scan.

Discard blank pages: If this option is enabled, blank pages will not be scanned.

Automatic document feeder: This option is intended for scanner who have an automatic paper feeder.

Automatic deskew: If this option is enabled, pages scanned diagonally are straightened, if possible.

Duplex scan: This option is intended for scanners that can scan front and back pages.

Brightness: Define the brightness of the scan here.

Contrast: Define the contrast of the scan here.

Threshold: Define the threshold for the scan process here. The threshold is the value that determines whether a pixel is white or black.

Split pages

The following settings apply to how to handle separator pages.

Separator pages: You can use the drop-down menu to specify whether you want to use separator pages. If multiple documents are scanned in sequence, ELO recognizes individual documents based on the separator pages.

Automatically split pages after the following page number: If you select this option, ELO splits the documents when scanning based on the defined number of pages.

You can also use separator pages. If a separator page is detected, ELO splits the document after the separator page. The page count begins again after the separator page.

Page format

The following settings apply to the documents being scanned.

Page size: In this drop-down menu, you select which paper format is used.

Dimensions in: Use this drop-down menu to set the unit of measurement for a user-defined page format.

Scan clip: If you have selected the option *User-defined* in the *Page size* drop-down menu, use the fields under *Scan clip* to specify the area that will be included in the scan.

Save document

The following settings apply to the save process.

Image format: Use this drop-down menu to select the file format you want to save scanned documents in. The following formats are available:

- TIFF: Black/white and color scans
- JPEG: Only color scans
- PDF: Black/white and color scans

Compression: In this drop-down menu, you can specify whether you want to compress the scanned documents.

Quality: If you have selected the *JPEG* option in the *Compression* drop-down menu, you can select the image quality.

Select scanner

Available in: *Ribbon > New > Scan*

Use this function to choose the scanner that you want to use. This function only applies when you use multiple scanners.

New folder

Use this function to create a new folder in ELO. You can find more information in the *Create folder* chapter.

Insert file

This function enables you to transfer a file from your local file system to ELO. The file is filed to the currently selected folder. If you are in the *Intray* work area, the file is transferred to the *Intray* work area.

For more information, refer to the chapter *Insert document*.

Document from template

Keyboard shortcut: CTRL + N

Use this function to create a new document based on a document template. Use the *Document from template* dialog to select a document to use as a template. The template is opened for editing in the corresponding application. After editing, the document must be saved and checked back into ELO.

For more information, refer to the chapter *Insert document*.

Start workflow

This function starts a new workflow. The workflows available to you when you run the *Start workflow* function were defined by your company. Use the *Start workflow* dialog box to change a template for the new workflow. To allow changes to the template when starting the workflow, enable the option *Start workflow in edit mode* (*Ribbon > User menu [your name] > Configuration > Advanced settings > Workflow*).

You can find more information in the *Start workflow* chapter.

Ad hoc workflow

Keyboard shortcut: CTRL + W

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

You can make the following settings in the *Start ad hoc workflow* dialog box:

Name and type

Name: Insert the name of the new ad hoc workflow here.

Load ad hoc workflow from template (folder icon): Use the *Load ad hoc workflow from template* function to load ad hoc workflows saved as a template.

Save as template (diskette icon): The *Save as template* function allows you to save the current ad hoc workflow as a template. You can assign a name to the template.

ELO creates a folder for each saved template in the user's folder under *Administration//Users//<Folder with corresponding number range>//<User name>//data//AdHoc Templates*. The template data is saved to the extra text of the respective folder.

Information

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

Delete an existing template (X icon): You can delete ad hoc workflow templates with the *Delete an existing template* function. A dialog box appears in which you can select the template you want to delete.

Please note

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

Priority: Set an importance level for the workflow: A (= high), B (= medium), or C (= low). You can sort and filter the task list according to priorities.

Type: Select the type of ad hoc workflow you want to create. You can choose from the following types:

- Serial approval: The workflow is passed forward sequentially to the participants. They must decide whether or not to approve the workflow step. Depending on the result, the corresponding notification is sent to the selected recipient.
- Parallel approval: The workflow is distributed in parallel. All recipients receive the workflow at the same time. Each participant must grant approval.
- Serial notification: The workflow is passed forward sequentially to the individual participants. They must confirm receipt of the workflow one after another. As long as the user does not confirm the workflow, the workflow is not passed forward to the next participants.
- Parallel notification: The workflow will be sent to all participants at once. They must confirm receipt of the workflow. After completion, the corresponding notification is sent to the selected recipient.

User selection and job instruction

Add user/group: Search for the desired user or group in the *Add user/group* field. Suggestions will appear as you type.

Click the corresponding suggestion to select a user or a group.

Alternative: If you select the triangle to the right of the *Add user/group* field, this will open a drop-down menu. This menu contains a list of the users and groups you selected recently.

Information

In the case of serial ad hoc workflows, the workflow is delivered according to the order in the list. To change this order, use the *Move up* (small arrow icon pointing up) or *Move down* (small arrow icon pointing down) buttons.

Job instruction: In the *Job instruction* field, enter the individual job instruction for the user selected in the list. The user sees the job instruction in the *Workflow step* column of the *Tasks* work area as soon as they have accepted the workflow.

Escalation management ×

Selected user: **Farrell**

Days Hours Min

3

Exclude weekends

Report missed deadline to

Jupiter ×

? OK Cancel

Escalation management: Select the *Escalation management* button to open this dialog box. This dialog box is where you specify how long the workflow may remain with the respective user. There is also the option to include or exclude Saturdays and Sundays when calculating the maximum workflow duration. You can also select a user who is notified if the deadline is missed.

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

Expand: If you select the *Expand* button, groups are not displayed as a group. Instead, the individual members of the group are listed.

Information

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

Completion options

Recipient: In this field, you can see which user will be notified when the ad hoc workflow is completed. You can change the recipient with *Select user*.

Success notification: Enter a text for the completion message.

Enter a text for this message in the Cancellation message field. This only applies to *Approval* type ad hoc workflows.

Withdraw the workflow from all users as soon as one user does not approve it: This option only applies for *Parallel approval* workflows. Enabling this option means that users no longer need to edit approval processes that have been canceled.

In the End script field, you can select a script that is executed after the ad hoc workflow is completed.

OK: Select *OK* to start the ad hoc workflow.

Reminder

Available in: *Ribbon > New > Create task*

Use this function to create a reminder for a document or a folder. A reminder defines a date on which the document or the folder appears in the *Tasks* work area of the user responsible.

The screenshot shows a 'Reminder' dialog box with the following fields and values:

- Name:** Meeting minutes
- Deadline:** (empty)
- Created on:** Feb 13, 2024, 10:58 AM
- Viewed on:** (empty)
- Priority:** B
- From user:** Farrell
- For user:** Add user/group
- User list:** Farrell (selected)
- Expand:** (button)
- Note:** (empty text area)
- Buttons:** OK, Cancel

Use this dialog box to create a new reminder. You can edit existing reminders as well.

The following options are available:

-

Name: Enter a name for the reminder.

- Deadline: Enter the date on which the document should be resubmitted as a task.
- Created on: The date that the reminder was created on.
- Viewed on: Shows the date that the reminder was viewed on.
- Priority: Choose between the priority levels *A*, *B*, or *C*. You can sort and filter the task list according to priorities.
- From user: Indicates who created the reminder.
- For user: Search for the desired user or group in the *Add user/group* field. Suggestions will appear as you type.

Click the corresponding suggestion to select a user or a group.

Alternative: If you select the triangle to the right of the *Add user/group* field, this will open a drop-down menu. This menu contains a list of the users and groups you selected recently.

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

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

Cancel selection: Use the X icon next to the selected user or group to cancel the selection.

Expand: If you select the *Expand* button, groups are not displayed as a group. Instead, the individual members of the group are listed.

- Note: Enter a message or instructions for the recipient of the reminder.

Additional information:

- You can open an overview of your reminders under *Ribbon > Organize > Overviews*.
- You can change a reminder in the *Tasks work area > Ribbon > Task > Edit*.
- There are two ways to delete a reminder:
 - With the function *Delete reminder* (available in: *Ribbon > Organize > Overviews > Reminders overview*)
 - Select the reminder in the *Tasks work area* and select the function *Delete* (available in: *Ribbon > Organize*).
- To display all reminders associated with an entry, select the entry and select *Ribbon > Organize > Overviews > Reminders for entry*.

Monitor changes

Available in: *Ribbon > New > Create task*

This function enables you to keep track of changes to a document or folder. If another user creates a new version of the document being monitored or if another user adds an entry to the folder being monitored, you will be notified in the *Tasks work area*.

Information

If you are monitoring a folder, you will be notified as soon as another user has created a new document or new child folder within this folder. When you monitor folders, you are not notified of changes to their child folders. To monitor changes to a child folder, you have to monitor the child folder specifically.

You can make the following settings:

- Name: Enter a name for the entry being monitored. The name of the selected entry is entered by default.
- Priority: Set the importance of the monitoring instance: A (= high), B (= medium), and C (= low). You can sort and filter the task list according to priorities.
- Note: Enter a note that appears in your Tasks work area.

Additional information:

You can open an overview of entries you are monitoring under *Ribbon > Organize > Overviews*. You can edit or end monitoring actions here.

'View' tab

Back

Use this function to go one step back in the viewing history of the document that you opened last.

Go to

This function 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.

Refresh

The function updates the view of the current work area. The data is reloaded from the server.

Forward

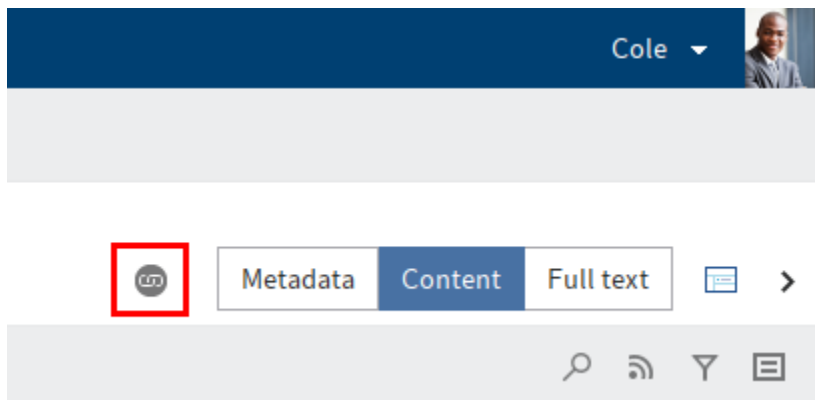
Available in: *Ribbon > View > Navigation*

Use this function to go one step forward in the viewing history of the document. You must have used the *Back* function at least once to be able to do this.

Link

Available in: *Ribbon > View > Navigation*

You can link entries (folders or documents) that are related. This enables you to access an entry from another entry using the link. If two entries are linked, the *Link* icon is displayed.



Information

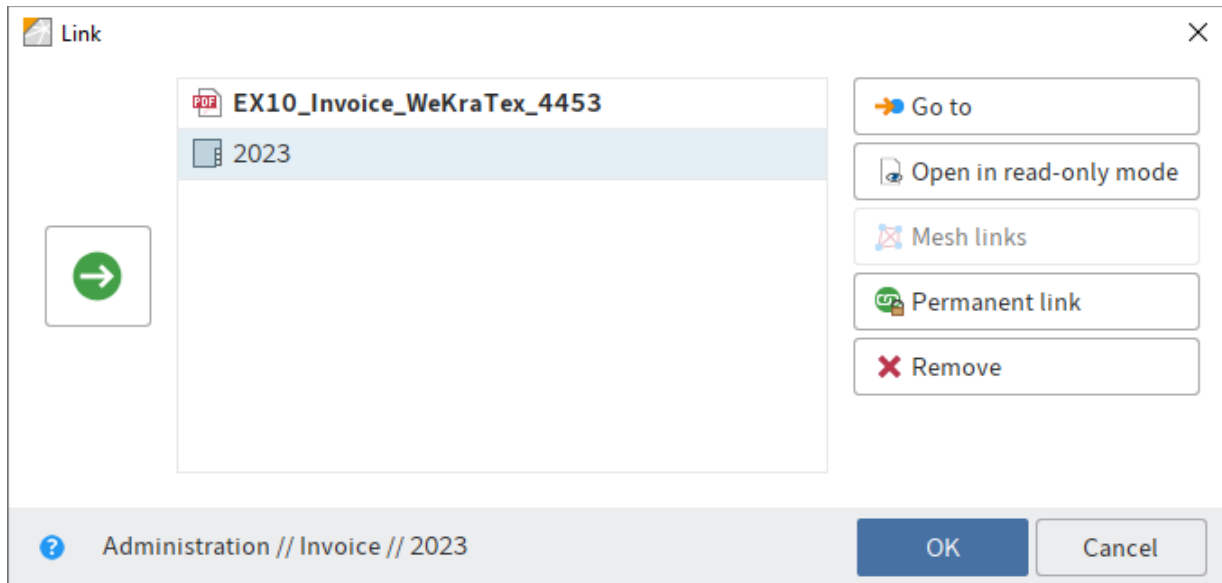
In the *Tree and table* layout mode, you can show the *Link* column in the table. A link icon is also displayed in this column if a link exists for an entry.

Method

- 1.

Select a document in the *Repository* work area.

2. Select *View > Navigation > Link*.



The *Link* dialog box opens.

3. Select a second document in the *Repository* work area. In the *Link* dialog box, select the *Add the selected entries as links* button (arrow facing right).

The second document is added as a link.

The following functions are available in the *Link* dialog box:

Go to: Jump straight to the respective entry in the *Repository* work area.

Open in read-only mode: Open the respective document for viewing in an external application.

Mesh links: If an entry is linked with multiple other entries, you can link all of the entries with this function.

Permanent link: The link to the selected entry is permanent. Permanent links cannot be deleted.

Remove: Deletes a selected entry from the list of links. The links to the entries are removed.

OK: Select *OK* to link the entries and close the dialog box.

To edit an existing link, click the *Link* icon.

Templates

Available in: *Ribbon > View > Navigation*

Use this function to jump to the folder with the document templates in ELO. Specify the filing location of the folder with the document templates on the *Ribbon > User menu [your name] > Configuration > Technical presets > Folder for document templates*.

For more information, refer to this chapter: Insert document.

Go to top level

Available in: *Ribbon > View > Navigation*

This function takes you to the top level of the *Repository* work area.

Copy to clipboard

Available in: *Ribbon > View > Navigation*

Use this function to transfer a document or a folder to the *Clipboard* work area. The *Clipboard* work area is used as a kind of favorites list in which you can collect frequently used documents. A reference to the selected entry is created on the Clipboard. The filing location in ELO does not change.

You will find more information here: 'Clipboard' work area.

Remove from Clipboard

Available in: *Clipboard work area > Ribbon > View > Navigation*

Use this function to remove the entry from the *Clipboard* work area. The entry remains unchanged in the *Repository* work area.

You will find more information here: 'Clipboard' work area.

New view

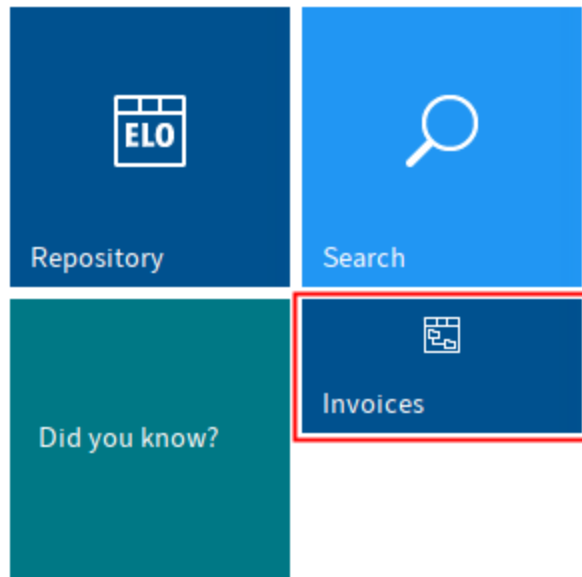
Available in: the *Repository*, *Tasks*, *Search*, and *Clipboard* work areas via *Ribbon > View*.

Keyboard shortcut: ALT + N

Use the *New view* function to create a new view in the *Repository*, *Search*, and *Clipboard* work areas, or a new task view in the *Tasks* work area. The folder views and task views are added as tiles to the tile navigation.

You will find more information here: Create tile.

Repository



Folder view: A folder view is restricted to a part of the repository.

Tasks



Task view: A task view filters the task list according to specific criteria. The criteria are stored in the respective task view.

Edit view

Available in: *Ribbon > View > Views*

Use the *Edit view* function to edit the settings of a folder, task, or search view.

You will find more information here:

- Create tile
- Create search view

Manage views

Available in: *Ribbon > View > Views*

Use the *Manage views* function to open the *Manage views* dialog box for editing folder and task views. The View and Task view columns show whether and which views exist. Edit the selected view in the right column of the dialog box..

You will find more information here: [Create tile](#).

Delete view

Available in: *Ribbon > View > Views*

Use the *Delete view* function to delete the selected folder view or task view.

Open a new window

Available in: *Ribbon > View > Window*

Use this function to open a second ELO Java Client window.

Show side by side

Available in: *Ribbon > View > 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.

Show stacked

Available in: *Ribbon > View > Window*

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

Show preview document

Available in: *Ribbon > View > Display*

The preview document is a special image document that is stored separately in ELO. Use this function to display documents if there is no viewer for the original format. You can use this for CAD files, for example.

You will find more information here: [Create preview document](#).

Switch PDF preview

Available in: *Ribbon > View > Display*

Use this function 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.

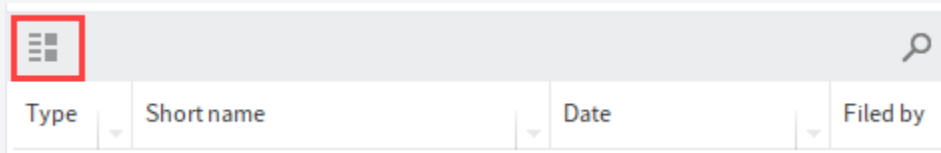
Expand branch

Available in: *Ribbon > View > Arrange*

Use this function to open the child entries of a selected folder. All existing child entries are displayed.

Information

You will find the display options *Table*, *List*, *Tiles*, and *Tree* on the new gray toolbar in ELO 21.



'Output' tab

Send document

Keyboard shortcut: CTRL + M

This function enables you to send a document as an e-mail attachment. A new e-mail opens in your e-mail program with the document attached. Enter any necessary additional information and send the document.

Send as ELO link

This function enables you to send a selected entry as an ELO link. A new e-mail opens in your e-mail program with the ELO link attached. The recipient can open the entry from the ELO link. The recipient must have access to ELO.

Send as PDF

Available in: *Ribbon > Output > Send*

This function converts a document to PDF format. A new e-mail opens in your e-mail program with the PDF attached.

You can send the PDF with or without annotations (e. g. sticky notes). Select the desired option in the *Send as PDF* dialog box.

You can specify your preferred setting in the configuration under *Dialog boxes > Annotations* when sending as PDF. You can select the options *Confirm via dialog box*, *Do not embed annotations*, or *Always embed annotations*.

Save as

Keyboard shortcut: CTRL + S

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

Save as ELO link

Available in: *Ribbon > Output > Save*

Use this function to store the selected entry as an ELO link in your local file system. The ELO link opens the filing location of the file in ELO. This enables another user to open the entry in ELO. This person must have access to ELO.

Link with drag-and-drop

Available in: *Ribbon > Output > Save*

If this function is enabled, you create a link file when you drag an entry from ELO. When you drop the entry onto the target, you create a link to the entry in ELO. This function allows you to create links on the desktop or in an e-mail, for example.

1. Click the entry you want to create an ELO link for.
2. Drag and drop the entry outside of the client, e. g. on your desktop.
3. Release the mouse button.

The ELO link is created.

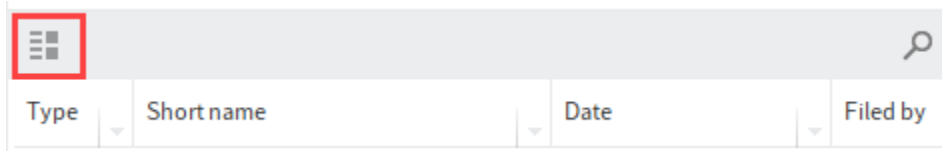
4. Click the link to open the corresponding entry in ELO.

Save table to clipboard

Available in: *Ribbon > Output > Save*

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.

Alternatively available in: *Toolbar > Display options > Table*.



Folder synchronization

Available in: *Ribbon > Output > External link*

The function *Folder synchronization* enables you to synchronize data in an ELO folder with an external file system or a mobile device or create a copy of the folder. For example, you can take all the documents you need to external appointments and then import any changes back into ELO.

Requirement: First you need to map the ELO folder to an external folder via [Output > External link > Configure folder](#).

ELO checks whether synchronization folders from known cloud service providers are located on your computer. You are then asked if you want to use these folders as counterparts for folders in ELO. You can also synchronize folder pairs of your choice. The function automatically synchronizes data in both directions. In addition to synchronizing documents, it is also possible to map folder structures.

You can access data in your provider's cloud and edit it from any Internet-ready device. Once you log back on to the ELO Java Client, you can transfer changes or new files to ELO.

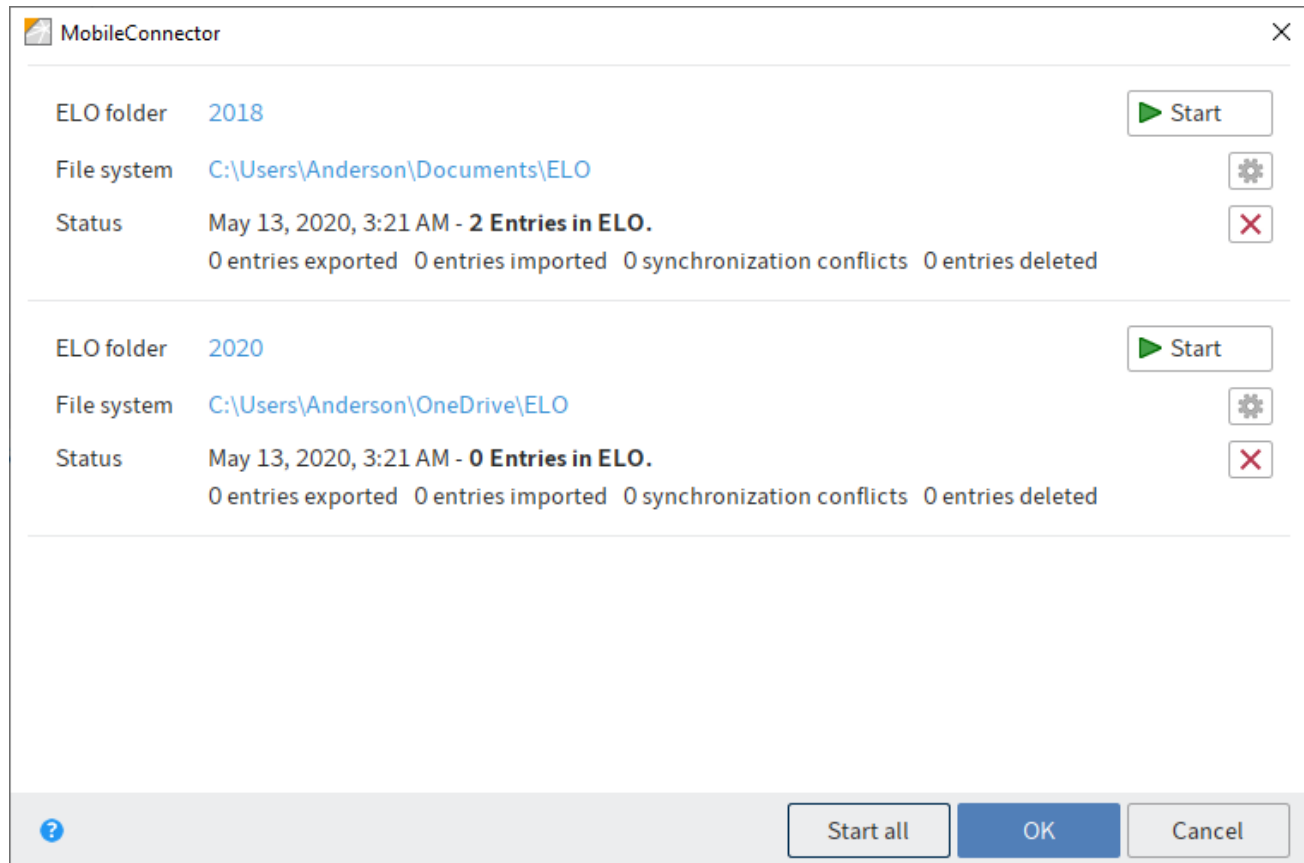
Important

As you can synchronize in both directions, this may cause documents to be deleted on the computer's file system.

The following describes how to use folder synchronization once you have set up at least one folder pair. You can find more information on how to do this in the section *Configure folder*.

Method

1. On the ribbon, select *Output > External link > Folder synchronization*.



The *Folder synchronization* dialog box opens. You will see existing folder pairs and the status of the last synchronization run.

The dialog box contains the following options:

Start (green triangle): Starts synchronization for the respective folder pair

Please note

If you have enabled the option *Synchronize without metadata* in the settings and add a file to the folder in the file system, the file name must start with a plus icon (+) so that it is transferred to ELO during synchronization. The plus icon in the file name is automatically removed during synchronization.

Settings (gear icon): Opens the *Add folder* dialog box You can change the settings for the respective folder pair here. If the settings for a folder pair were changed, you will see an orange bar in front of the folder pair in the *Folder synchronization* dialog box.

Delete (X icon): Removes the folder pair

Information

Deleting a folder pair does not delete the folders themselves. It only removes the folder mapping.

Start all: Starts synchronization for all available folder pairs

Please note

If you delete and edit the JSON files, you will lose important data about the synchronization process.

Configure folder

Available in: *Ribbon > Output > External link*

The *Configure folder* function enables you to configure an ELO folder for synchronization with a folder outside of ELO or save a copy.

To select a folder for synchronization, follow the steps below.

1. Select a folder in ELO.
2. On the ribbon, select *Output > External link > Configure folder*.

Add folder [X]

ELO folder 2020
// Finance // Invoices // 2020

Target in file system

Base folder ⓘ

C:\Users\Anderson\OneDrive\ELO [v] [New target]

C:\Users\Anderson\OneDrive\ELO\2020

Transmission options

- Synchronize, with metadata
- Synchronize, without metadata
- Save as copy, without metadata
- Run automatically when ELO starts
- Export references as well

[?] [OK] [Cancel]

In the *Add folder* dialog box, you specify the target folder in the file system and define the transmission settings.

ELO folder

Under *ELO folder*, you can see the folder selected in ELO.

Target in file system

Under *Target in file system*, you can see the folder selected as the target in the file system. You can select existing paths from the drop-down menu of the *Base folder* field. Select *New target* to assign a different folder.

Information

The module automatically searches for cloud folders from the following providers: Dropbox, Google Drive, Microsoft OneDrive, GMX MediaCenter, WEB.DE Online-Speicher, and SpiderOak Hive. If this kind of folder is detected on the computer's file system, ELO automatically enters the detected path under *Base folder*.

Transfer options

In the *Transfer options* area, you can adjust the synchronization settings. The following settings are available:

Synchronize, with metadata: The folders selected above are synchronized. An additional file is stored on the file system for each synchronized entry (folder or document). This additional file saves the metadata of the synchronized entry in JSON format.

Synchronize without metadata: The folders selected above are synchronized. This option synchronizes the documents and child folders but ignores the metadata. If you add a file to the folder in the file system, the file name must start with a plus icon (+) so that it is transferred to ELO during synchronization. The plus icon in the file name is automatically removed during synchronization.

Save as copy without metadata: The *Save as copy* option saves an identical copy of the folder to the Windows file system but without metadata (GUID, metadata information).

Run automatically when ELO starts: If you select the option *Run automatically when ELO starts*, the base folder and ELO folder are synchronized every time ELO starts.

Please note

If you need to synchronize a large number of folders, this will delay all other processes when starting ELO. For this reason, this function is not recommended for very large directories that rarely change. In such cases, it makes more sense to create multiple folder pairs and only set up automated synchronization for selected ones.

Export references as well: Enable the *Export references as well* option to also export references in the folder for synchronization.

Additional information

To start the folder synchronization, select *Output > External link > Folder synchronization* on the ribbon..

Create external link

Available in: *Ribbon > Output > External link*

The external link enables users without ELO to access files. You can send the external link to people outside your company network, e. g. by e-mail. Users can download the files directly via the link.

Information for administrators

Without additional configuration, the function is only available for computers that are in the same network or domain as the ELO server. For information on enabling the function for external devices, refer to the [ELO server](#) documentation.

The screenshot shows a dialog box titled "Create external link" for a document named "Document Invoice Contelo". The dialog is divided into two main sections: "Restrictions on the external link" and "Share link".

Restrictions on the external link:

- Available until: May 26, 2020
- Available indefinitely
- Restrict number of downloads to: 5

Share link:

- Send by e-mail
- Copy to clipboard

At the bottom right, there is a "Cancel" button. A help icon (?) is located at the bottom left.

The following options are available to restrict an external link:

- Available until: Period during which the link is available to external users
- Available indefinitely
- Restrict number of downloads to

The following options are available to provide a link:

- Send by e-mail: Send an e-mail with the external link to the shared document.
- Copy to clipboard: The external link is available in the clipboard for further use, such as in an HTML document. It can be used with an HTML document, for example.

Information

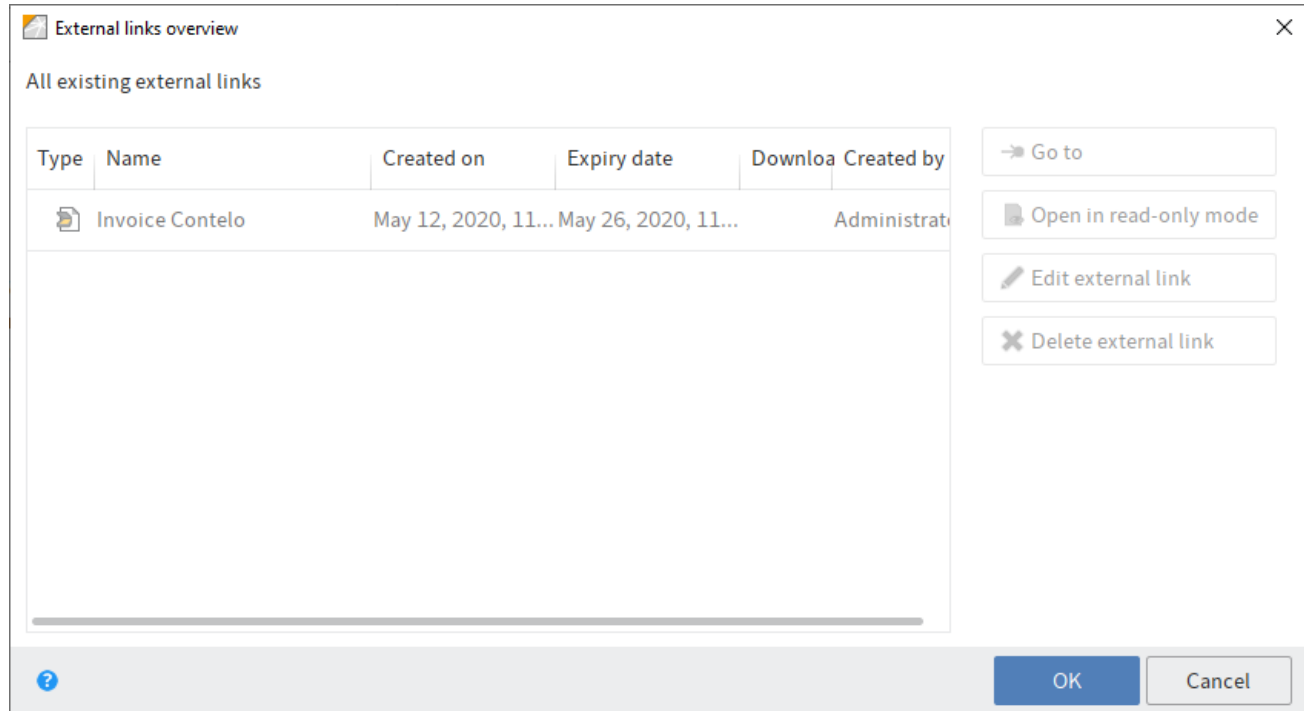
If you have selected multiple documents, the *Copy to clipboard* function is not available.

Outlook

You can open an external links overview. You can edit or delete the external links here.

External links overview

Available in: *Ribbon > Output > External link*



The *External links overview* dialog box contains an overview of the documents for which an external link was created. You can edit or delete the external links.

The list is divided into the following columns:

- Type: Document type
- Name: Short name of the document the external link refers to.
- Created on
- Available until: Shows how long the external link is available. If a time is not specified, the link can be accessed indefinitely.
- Access count: Indicates how many times the external link can be accessed. If a number is not entered, the link can be accessed an unlimited number of times. Every time the external link is accessed, the number of times it can be accessed again decreases.
- Created by

The dialog box has the following buttons:

- Go to: Jumps straight to the respective document
- Open in read-only mode: Opens the respective document in an external application
- Edit external link: Opens the *Edit external link* dialog box. You can change the settings of the selected external link here.
-

Delete external link: Removes the selected external link. The external link is initially marked red. The link 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.

Manage mobile devices

Available in: *Ribbon > Output > External link*

This function allows you manage the mobile devices used to transfer documents to the ELO Java Client with the ELO Connect app. The connection settings are configured in ELO Connect. A new device will only appear in the *Manage mobile devices* dialog box after data has been transferred.

You can rename the mobile devices or delete them from the list.

For more information, refer to the [ELO Connect](#) documentation.

Print document

Keyboard shortcut: CTRL + P

This function enables you to print a document selected in ELO.

Print metadata

Available in: *Ribbon > Output > Print*

You can use this function to print the metadata of a selected entry. Only the basic information that is also displayed on the *Metadata* tab is printed.

You will find more information on metadata here.

Fax document

Available in: *Ribbon > Output > Print*

Use this function to send a document as a fax. This function uses the fax printer configured in the *Configuration* dialog box (*Ribbon > User menu [your name] > Configuration > Technical presets > General > Set as fax printer*).

Information

If you don't have a printer with a fax function, the document will be printed.

Export

This function enables you to export folders or documents from ELO. You can also export the entire repository.

Information

To export the entire repository, select the top level of the *Repository* work area.

Export

Export target

Target path for the export data set: C:\Exports\Document_template.eloexp Select

Selection

Preselection in the search: **1 Folders** Export all search results

Filter documents

- > By date
- > By metadata form

Export parameters

- Folder structure with documents Empty folders
- Folder structure only All document versions
- Documents only ⓘ Attachments
- Keyword lists ⓘ
- Reminders
- Replace references with originals ⓘ

> Decrypt and export encrypted documents ⓘ

? OK Cancel

Use this dialog box to make settings for the file export.

Export target

In the *Export target* dialog box, you can see the target path for exporting the data set if this has already been selected.

Select: Opens the dialog box for selecting the target path and specifying the file name. The file type must be *ELOEXP*.

Selection

In the *Selection* area, you can see how many elements (folders or documents) you have selected for export.

Filter documents

In the *Filter documents* section, you can set filters for restricting which documents you want to export.

By date: If you have enabled this option, you can set a date range for the document date and the filing date. Only documents within these date ranges will be exported.

By metadata form: If you enable this option, you can select one or multiple metadata forms from the drop-down menu. Only those documents that were assigned the selected metadata form(s) will be exported.

Export parameters

In the *Export parameters* area, you determine which components will be taken into account during export. You can choose from *Folder structure with documents*, *Folder structure only* and *Documents only*. Depending on your selection, you can select additional export options. This includes *All document versions*, *Keyword lists*, *Reminders*, and the option *Replace references with originals*.

Folder structure with documents: If this option is enabled, the folder structure and the documents in it will be exported.

Folder structure only: If this option is enabled, the folder structure is copied without documents.

Documents only: If this option is enabled, the documents are copied without the folder structure.

Empty folders: If you enable this option, folders that are empty will also be exported.

All document versions: If this option is enabled, all document versions will be exported.

Attachments: If this option is enabled, the current attachments are also exported.

Keyword lists: If this option is enabled, the keyword lists assigned to the metadata forms are exported with the entries.

Please note

Keyword lists that already exist in the target repository may be replaced during import. If there are identical metadata forms in the export data set and the target repository, check whether you want to import the keyword lists as well.

Reminders: If this option is enabled, reminders are also exported with the entries.

Replace references with originals: If this option is enabled, references will be replaced with their original files during export. If this option is disabled, references are only replaced if the original documents were not exported with the entries.

Decrypt and export encrypted documents: This option also includes encrypted documents in the export.

OK: Starts the export process

Import

This function enables you to import data into the *Repository* work area.

Please note

You can only import data that was previously exported from an ELO repository.

Import

Source: C:\Exports\Document_template.eloexp Select

Import target: Repository1 // Documentation // Sample documents Select
 Apply from export data set: **Repository1 // Documentation**

Method: Check GUIDs ⓘ
 If GUID already exists: Reassign GUID
 Reassign GUIDs of all entries (no verification whether GUID already exists)

Options: Keep filing date
 Import keyword lists ⓘ
 Re-encrypt documents ⓘ

?

OK Cancel

Source

Select: Use the *Select* button next to the *Source* field to choose a source for the import. The source must be a ZIP or ELOEXP file.

Import target

Define an import target in ELO. You can either select a new target in ELO or copy the old filing location from the export data set.

Select: Use the *Select* button next to the *Import target* field to select an import target in ELO.

Apply from export data set: If this option is enabled, the data set imported will retain the structure it had when you exported it. The respective structure is displayed next to the option.

Method

The following methods are available for handling GUIDs:

Information

A globally unique identifier (GUID) is a number with 128 bits used for the unique identification of documents and folders in ELO on distributed computer systems.

Check GUIDs: When importing the data set, the GUIDs are compared with the GUIDs in ELO. The following options are available if there are identical GUIDs:

- Reassign GUID: Entries that have an existing GUID in ELO are imported with new GUIDs. This allows you to create duplicates.
- Do not import: Entries that have an existing GUID in ELO are not imported.
- File as new version: Entries that already have a GUID in ELO are imported as a new version of the corresponding entries.

Reassign GUIDs of all entries: ELO does not check whether GUIDs already exist during import. All entries from the import data set are assigned new GUIDs. This allows you to create duplicates.

Options

Keep filing date: To keep the filing date, select this option.

Import keyword list: This option allows you to import keyword lists from the data set.

Re-encrypt documents: If you select this option, a list of encryption keys found by the system appears. To import entries with an encryption key in encrypted form, enter the corresponding passwords. If you do not enter a password for an encryption key, entries in the corresponding encryption key will be imported unencrypted.

OK: Starts the import process

Package dependencies

If a source has package information, its package dependencies are shown in this area.

The source can only be imported if all specified package dependencies are available in ELO.

Information

If any package dependencies are missing, contact your system administrator.

Check package dependencies: You can check the dependencies again, e.g. after the required packages have been imported.

'Organize' tab

Move

Available in: *Repository* work area

You can link entries (folders or documents) within the tree structure.

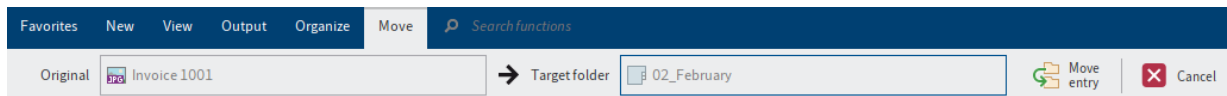
The following options are available for moving entries:

- 'Move' function
- Drag-and-drop

'Move' function

Method

1. Select the entry you want to move.
2. On the ribbon, select *Organize > Move*.



The *Move* tab opens. The selected entry is displayed in the *Original* field.

3. Select the target folder in the tree structure.

The selected folder is displayed in the *Target folder* field.

4. Select *Move entry*.

If the permissions of the entry do not match the permissions at the target location, the *Move entries* dialog box opens. You can modify the permissions of the moved entries in this dialog box.

Optional: You can also save your selection so that the dialog box doesn't appear the next time you run the function. You can change your selection in the configuration (available in: *User menu [your name] > Configuration > Dialog boxes > Inherit permissions when moving entries*).

Result

The entry is moved to the target folder.

Drag-and-drop

Method

- 1.

Click the entry you want to move and drag it to the target folder holding down the mouse button.

The *Drag-and-drop* dialog box opens.

2. Choose whether you want to move or reference the entry. A reference ascribes to an entry.

Optional: You can also save your selection so that the dialog box doesn't appear the next time you run the function. You can change your selection in the configuration (available in: *User menu [your name] > Configuration > Dialog boxes > Drag-and-drop*).

Reference

Available in: *Ribbon > Organize > Structure*

Use this function to create a reference to a document or folder selected in ELO. A reference is a link between a copy of an original document. The document only exists once physically in ELO. All changes to the document automatically apply to the references. This prevents duplicates.

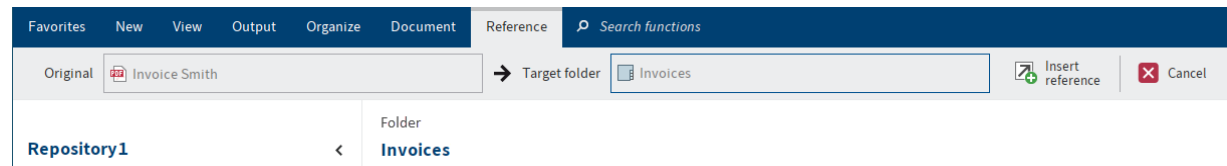
The following options are available for referencing entries:

- 'Reference' function
- Drag-and-drop

'Reference' function

Method

1. Open the *Repository* work area.
2. Select a document or a folder.
3. On the ribbon, select *Organize > Structure > Reference*.



The *Reference* tab opens.

The name of the selected document or folder is displayed in the *Original* field. You will be asked to select a target folder in ELO.

4. Select the folder in ELO that you want to create the reference in.

The folder is displayed in the *Target folder* field.

5. Select *Insert reference*.

Result

The *Reference* tab closes. The reference is created in the selected target folder.



An arrow icon indicates that it is a reference.

Drag-and-drop

Method

1. Click the entry you want to reference and drag it to the target folder holding down the mouse button.

The *Drag-and-drop* dialog box opens.

2. Choose whether you want to reference or move the entry.

Optional: You can also save your selection so that the dialog box doesn't appear the next time you run the function. You can change your selection in the configuration (available in: *User menu [your name] > Configuration > Dialog boxes > Drag-and-drop*).

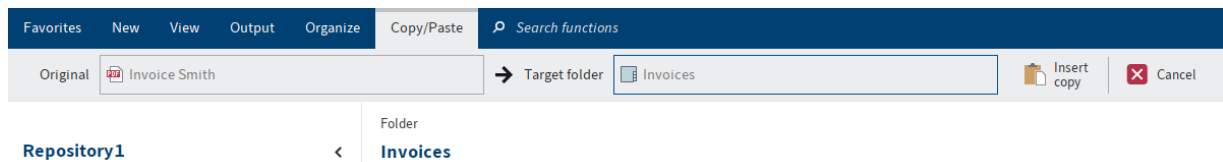
Copy

Available in: *Ribbon > Organize > Structure*

Use this function to copy the currently selected entry to the clipboard. You can copy an individual document, a folder or a folder structure with child folders. Use the *Insert copy* function to insert an entry at the desired location in ELO.

Method

1. Select the entry in ELO that you want to copy.
2. Select *Organize > Structure > Copy*.



The *Copy/Paste* tab opens.

3. Select the target folder in ELO.

The target folder is entered in the *Target folder* input field.

4. Select *Insert copy*.

Depending on whether you have copied a document or a folder, the corresponding Insert copy dialog box opens.

When copying documents or folders, you can choose from various options. For example, you can specify whether you want to keep the notes, the references, or the permissions.

5. Select *OK*.

Result

The copy is inserted in the target folder.

'Insert copy' dialog box

Insert copy of a document ×

Short name

Copy

- Notes
- All document versions
- Attachment
- Attachment versions

Permissions

- Replace with the permissions of the target folder
- Keep previous permissions unchanged
- Replace permissions inherited from the previous folder, keep individual permissions i

Retain user in "Filed by" and "Editor" field

OK Cancel

Insert copy of a document

If you want to insert the copy of a document, you have the following options under *Copy*.

Notes: If this option is enabled, notes are copied as well.

All document versions: If this option is enabled, the version history of the documents is copied as well. Otherwise, the current working version is copied.

Attachments: If this option is enabled, the current attachments are copied as well.

Attachment versions: If this option is enabled, the version history of the attachments is copied as well. Otherwise, the current attachment is copied.

Insert copy of a folder

If you want to insert the copy of a folder, you have the following options under *Copy*.

Basic entry only: If this option is enabled, only the selected folder without child entries is copied.

Folder structure only: If this option is enabled, the folder structure is copied without documents.

Folder structure with documents: If this option with documents is enabled, the folder structure and the documents in it will be copied.

References: If this option is enabled, references are copied as well.

Notes: If this option is enabled, notes are copied as well.

All document versions: If this option is enabled, the version history of the documents is copied as well. Otherwise, the current working version is copied.

Attachments: If this option is enabled, the current attachments are copied as well.

Attachment versions: If this option is enabled, the version history of the attachments is copied as well. Otherwise, the current attachment is copied.

Permissions

You can make the following settings for documents as well as folders:

Replace with the permissions of the target folder: The permissions of the copied entries are ignored and replaced by the permissions of the target folder.

Keep previous permissions unchanged: The copied entries keep the existing permissions.

Replace permissions inherited from the previous folder, keep individual permissions: The permissions of the copied entries are replaced with the permissions that apply for the target folder. Permissions that were not inherited from the original folder are retained.

Retain user in "Filed by" and "Editor" field: The users entered in the *Filed by* and *Editor* fields are copied from the original entries.

Insert default index

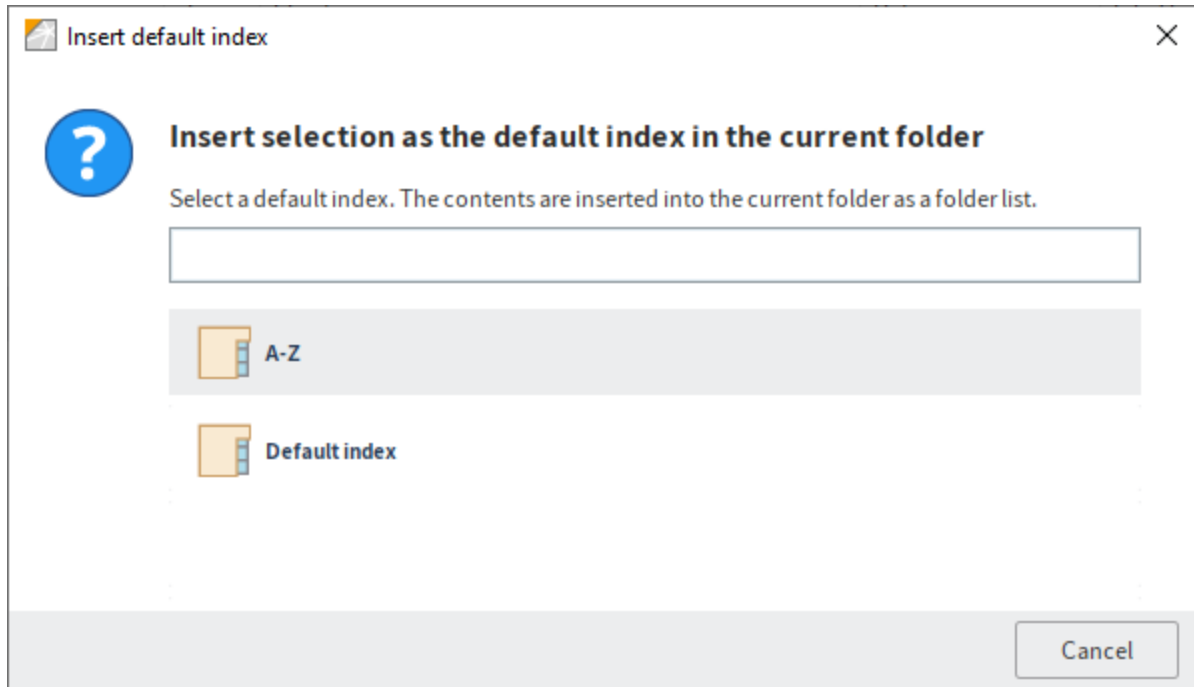
Available in: *Ribbon > Organize > Structure*

Use this function to insert a default index into a folder. A default index is a predefined child structure within a folder, e.g. a tab with a company name, months, A-Z.

Requirement: You must have created at least one default index before you can perform the following steps. You can do this with the Save as default index function.

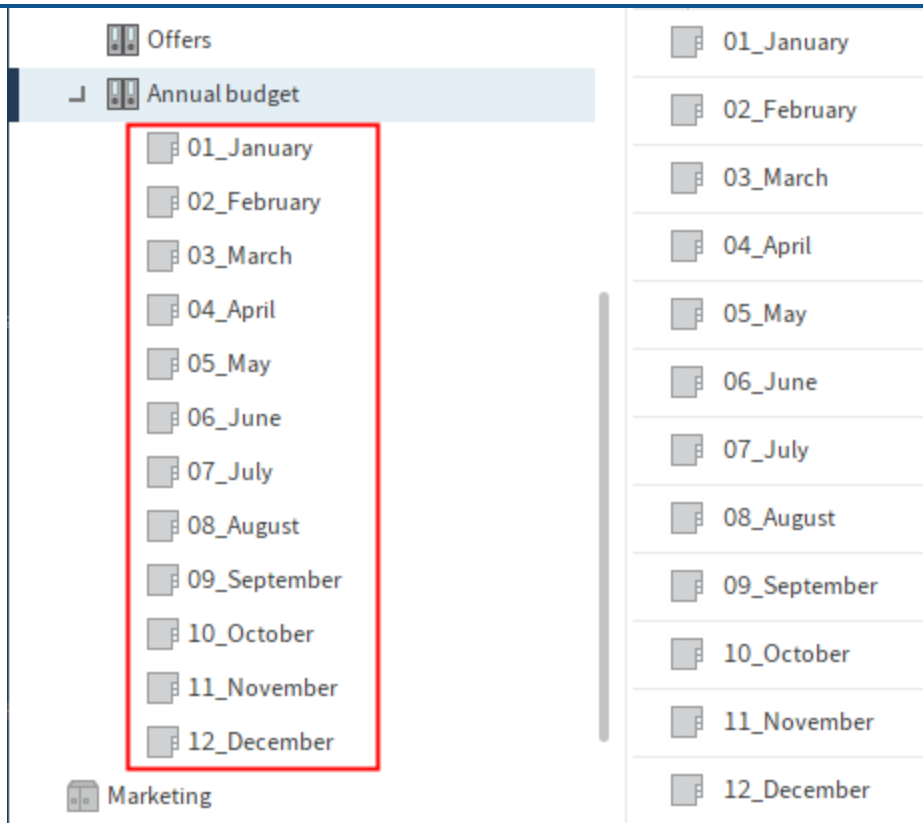
Method

1. Open the *Repository* work area.
2. Select the folder that you want to add a default index to.
3. On the ribbon, select *Organize > Structure > Insert default index*.



The *Insert default index* dialog box appears.

4. Select the desired default index.



Result

The default index is inserted into the folder.

Save as default index

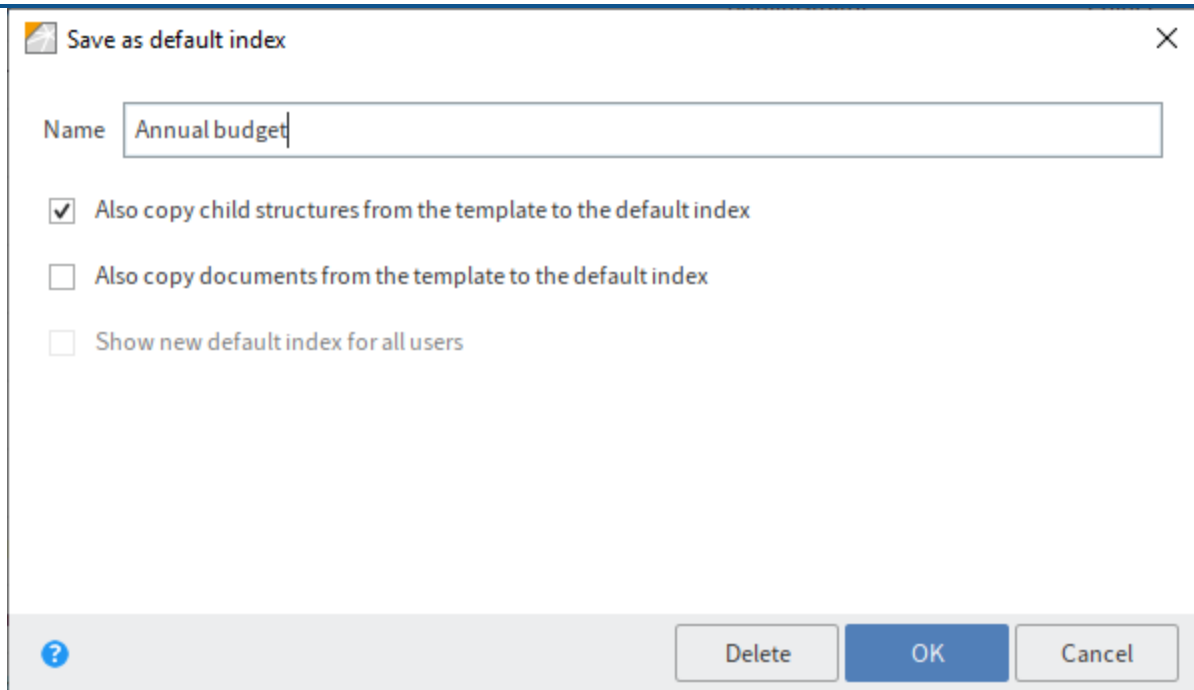
Available in: *Repository work area > Ribbon > Organize > Structure*

This function saves the folder structure of the selected folder as a default index. A default index is used as a template and can be used as often as required.

You can apply the default index to other folders via the Insert default index function. Documents or child folders with more than two levels are not saved.

Method

1. Select the folder that contains the child structure you want to save as a default index.
2. On the ribbon, select *Organize > Structure > Save as default index*.



The *Save as default index* dialog box appears.

3. Enter a name for the new default index.

Optional: Select the desired options in the check boxes. You have the following options:

- Also copy child structures from the template to the default index: If this option is enabled, all child structures in the selected folder are transferred to the default index.
- Also copy documents from the template to the default index: If this option is enabled, all documents in the selected folder are transferred to the default index.
- Show new default index for all users: If this option is enabled, the default index is available to all (global) users. If not, it is only available to the (local) user who created it.

Global default indexes are stored under *Administration//Default Indexes*.

Local default indexes are stored under *<User> // data // Default Indexes*.

4. Select *OK*.

Result

The default index is stored and is available via the *Insert default index* function.

Outlook

To delete an existing default index, select *Delete*. The *Delete default index* dialog box opens. Select the default index you want to delete.

Metadata

This function allows you to view the metadata for the entry.

If you have permission, you can edit the metadata.

Metadata is data about a folder or a document.

It includes information on the entry itself, for example when it was filed, or its name in the *Repository* work area. It also includes the permissions structure for the entry, meaning who has what access to the entry. The quality of a repository depends to a great extent on the quality of the metadata. Metadata allows you to organize documents in a standardized way and file them quickly to ELO. In addition, using metadata makes it easier to find documents.

A new metadata model was introduced with version ELO 21 in addition to the previous metadata model. Both models are used in parallel. In the following, these metadata models are referred to as generation 1 (gen. 1) and generation 2 (gen. 2).

In gen. 2, forms and metadata forms are shown differently in the *Metadata* dialog box. The metadata concept will remain the same.

There are three ways to open the *Metadata* dialog box manually. Select an entry and

- select *Organize > Metadata* on the ribbon.
- right-click to open the context menu, then select *Metadata*.
- press the keyboard shortcut F4.

This section provides information about entering metadata. Select one of the following links to go straight to a topic:

- Metadata forms
- Fields
- 'Basic' tab
- 'Extra text' tab
- 'Options' tab
- 'Permissions' tab
- 'Version history' tab
- 'Additional information' tab
- Identify personal data
- Delete entries with personal data
- Enter metadata with ELO Click OCR

Information

If the ELO Barcode module is installed, ELO can extract metadata from barcodes. You can find more information on the ELO Barcode module and configuring it in the ELO Administration Console in the [ELO Barcode](#) documentation.

Metadata forms

You enter metadata into metadata forms. Metadata forms contain templates that are specifically created for this document type. All documents of the same type receive the same permission settings and are filed to ELO based on a fixed pattern.

The view and functions in the metadata forms depend on the metadata model.

Gen. 2 metadata form

The screenshot shows the 'Metadata' window with the 'Basic' tab selected. The 'Available forms' list on the left includes 'Outgoing invoice'. The 'Basic data' section contains the following fields:

Field	Value
Short name *	EX10_Invoice_Contelo_0753
Invoice number *	EX-0753
Invoice status	open
Invoice date	03/01/2023
Filing date	03/08/2023 10:028 AM
Editor	Cole
Document date	03/03/2023 11:00 AM
Version	1

At the bottom, there is a checkbox for 'Expand keyword list automatically' and 'OK' and 'Cancel' buttons.

Gen. 1 metadata form

The *Available forms* area lists all the available metadata forms. The list contains either metadata forms for folders or for documents, depending on the type of entry selected in ELO.

Information

You can minimize the *Available forms* pane by selecting the *Hide metadata forms* icon (arrow icon pointing left). You can select the *Show metadata forms* button (arrow icon pointing right) to make the pane reappear.

Please note

When you change the metadata form, metadata may be lost or incorrectly assigned.

Fields

The metadata for a document is entered into fields.

The type of field determines the data you need to enter and what you need to consider when doing so. There are different types of fields, which can be configured differently from metadata form to metadata form.

Text field: You can enter letters, numbers, and special characters in a text field.

Mandatory field: Fields can be configured as mandatory to complete the metadata entry. A red asterisk and a red marking indicates that a field is mandatory. Any conflicts are displayed at the bottom of the dialog box.






Please note

Do not enter any words that can act as search operators (NOT, OR, AND) in fields. Otherwise, you may encounter issues when searching for these words.

Icons

If a field contains an icon, this means that ELO helps you to enter content in the field.

The following tools are available:

-  Keyword list
-  Drop-down menu
-  Calendar
-  Clock
-  Relation

Keyword lists

Customer



Keyword lists are used to standardize entries and make it easier to enter metadata.

There are two types of fields with keyword lists:

- You have to select an entry from the keyword list.
- You can select an entry from the keyword list or you can type in your own entry.

If you click a field and a keyword list appears, you cannot make entries.

Information

The following functions are only available in the gen. 1 metadata forms.

You can enter multiple keywords in these fields, separating them by a pilcrow sign (¶).

Please note

Keywords containing a pilcrow sign are treated like a list of keywords, as pilcrow signs are used as a separator between multiple values.

Expand keyword list automatically: If this option is enabled, the keyword list opens as soon as you start to type text into a field.


 Expand keyword list automatically ⓘ

OK

Information

You can either click the check box to enable the *Expand keyword list automatically* option or use the keyboard shortcut CTRL+K.

If the *Expand keyword list automatically* option is disabled, you need to open the keyword list using the list icon at the bottom of the index field.

Alternative: Open the keyword list using the F7 key.

To edit the keyword list, right-click a keyword list entry.

You can add new keyword list entries or child entries via the context menu. You can edit or delete existing keyword list entries or child entries.

In the *Keyword list editor* dialog box, you change the name of a keyword.

The following options are also available:

Merge keyword: If a keyword has child entries, you can use this option so that the child entries are always inserted into the field together with the parent keyword. The parent keyword option must be enabled for this to work.

For example, if your keyword list contains the keyword *Invoice* with the child entries *Miller* and *Smith*, either the expression *Invoice Miller* or *Invoice Smith* will be used. You can only choose between the child entries of the keyword.

Disable keyword: Use this option to deactivate a keyword. The keyword can no longer be selected and will be grayed out.

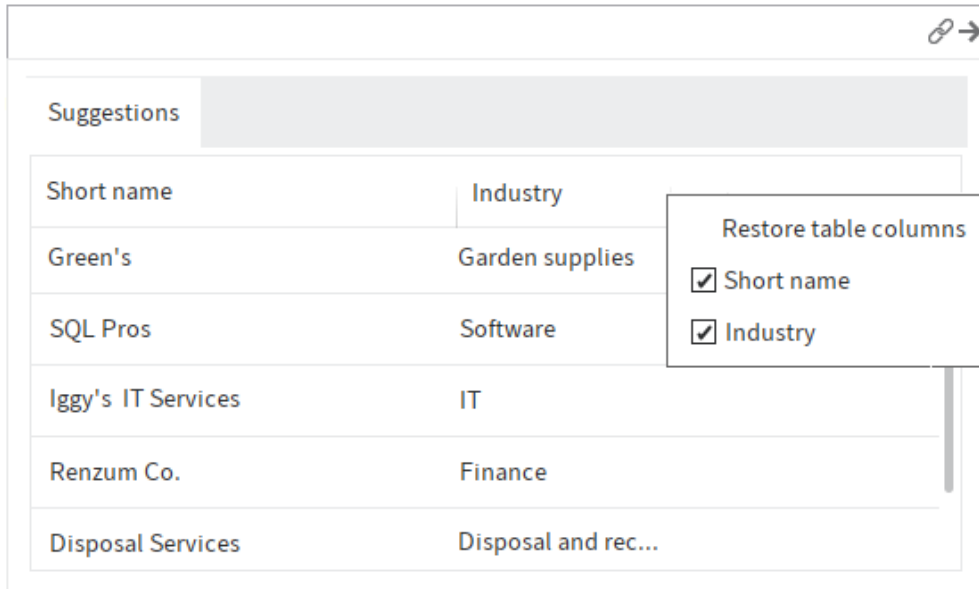
Relations

Relation type fields are used to link a field with the metadata of another entry.

Company 

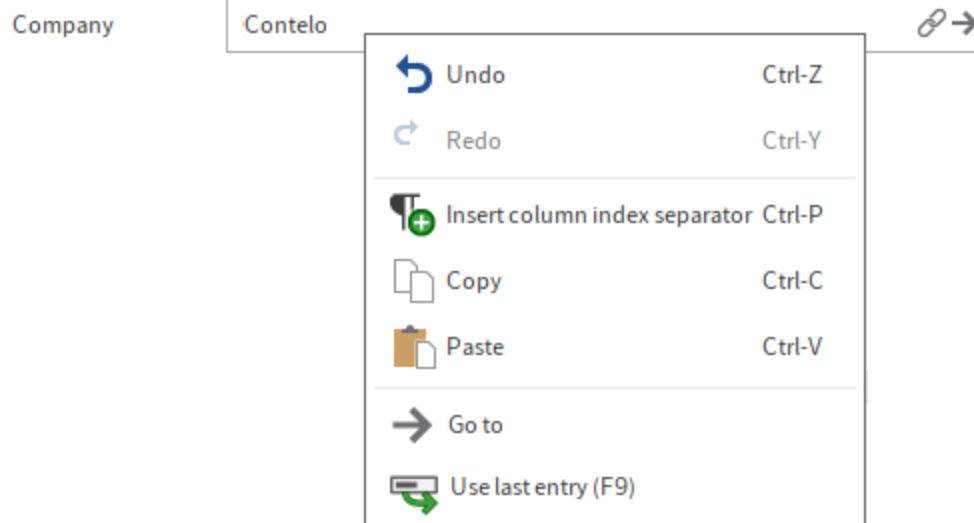
The chain icon opens a list of entries. Select the entry you want to link. Navigate the list using the mouse or arrow keys.

Company



Short name	Industry
Green's	Garden supplies
SQL Pros	Software
Iggy's IT Services	IT
Renzum Co.	Finance
Disposal Services	Disposal and rec...

Click the title of a column to sort the list. You can hide and show columns using the context menu, which you access by right-clicking in the column titles.



Clicking the arrow next to the chain icon takes you straight from the metadata of the entry to the metadata of the linked entry. Alternatively, right-click on the relation field to open the context menu and select the *Go to* button. The metadata of the linked entry is displayed in the *Metadata* dialog box.

Additional functions in the 'Metadata' dialog box

The *Metadata* dialog box offers the following additional functions:

Undo (CTRL+Z)

The keyboard shortcut CTRL+Z undoes the last action in a field.

Alternative (gen. 1 only): Click the *Undo* function in the context menu of the field (right-click).

Redo (CTRL+Y)

The keyboard shortcut CTRL+Y reapplies the last action that was undone in a field.

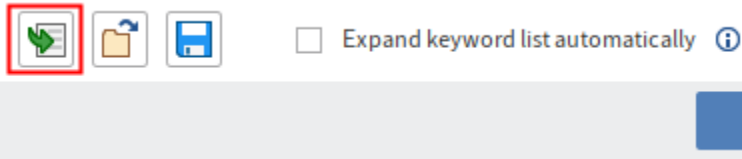
Alternative (gen. 1 only): Click the *Redo* function in the context menu of the field (right-click).

The following functions are also available for gen. 1 metadata forms:

- Automatically enter metadata
- Pin function
- Use last entry
- Insert column index separator
- Load metadata
- Save metadata

These functions are briefly explained in the following section.

Automatically enter metadata



The *Enter metadata using the most recently saved/displayed entries [F3]* button (icon with the green arrow) enables you to apply the metadata that you entered or opened last.

Alternative: Call the function using the F3 key.

Information

The data in the fields *File name*, *Entry type*, and *Document path* are not overwritten with this function. The original data is retained in these fields.

Pin entry to field (Intray only)



To enter the same value to a field in multiple documents in the Intray, enable the function *Pin entry to field* using the F8 key.

Alternative: Click the *Pin entry to field* function in the context menu of the field (right-click).

A pin icon appears.

As soon as you file the next document with the same field, the value you entered previously will be applied.

Please note

The value is only saved for the current session. The ELO Java Client does not "remember" the value once you have closed the program.

Use last entry

To reuse a value from a field the next time you enter metadata, use the F9 key.

Please note

The value is only saved for the current session. The ELO Java Client does not "remember" the value once you have closed the program.

Insert column index separator

	Product version	<input type="text"/>
	Category I	Client User manual
	Category II	<input type="text"/>

To save multiple values to a field, separate the values with a pilcrow character (¶). Use the keyboard shortcut CTRL+P.

Alternative: Click the *Column index separator* function in the context menu of the field (right-click).

Load metadata

Expand keyword list automatically

This button enables you to load a metadata file (.es8) into the current metadata for the document. Metadata of an ELO entry is stored in ES8 files.

Alternative: Call the function using the keyboard shortcut CTRL+L.

Information

When you load an ES8 file into the metadata, the existing metadata is overwritten without showing a confirmation.

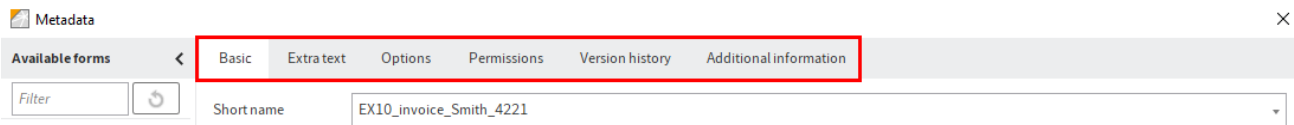
Save metadata

Expand keyword list automatically

Select this button to save the metadata of the current folder or document as an ES8 file.

Alternative: Call the function using the keyboard shortcut CTRL+S.

Tabs



Metadata forms are divided into tabs. There are several default tabs:

- Basic
- Extra text (only in gen. 1 metadata forms)
- Options
- Permissions
- Version history
- Additional information

The default tabs are briefly described in the following section. Additional tabs appear depending on the settings in the metadata form.

'Basic' tab

The *Metadata* dialog box opens to the *Basic* tab. It contains at least the following default fields:

Short name: Name of the entry that is shown in the tree structure in the *Repository* work area.

Document date (gen. 2)/Date (gen. 1): The document date refers to the date the associated file was last accessed. The document date is updated when changes are made to the document.

You can also edit the document date manually using the calendar function.

In gen. 1 metadata forms, you can enter information into this field using the following syntax:

- +x = today in X days
- +xd = today in X days (d for days)
- +xm = today in X months (m for months)
- +xy = today in X years (y for years)
- To enter a past date, use - (minus) instead of + (plus).

Example 1

Entering +1m on Dec 2, 2019 returns the date Jan 2, 2020. If you were to enter -1y, this would return the date Dec 2, 2018.

ELO also automatically completes the following entries:

- 05 is returned as <current month> 05, <current year>
- Dec 5 is returned as Dec 5, <current year>

Example 2

Entering 31 on December 2, 2019 returns the date December 31, 2019.

Filing date: The filing date refers to the date the document is filed to ELO.

Version (gen. 2)/Current version (gen. 1): Shows the individual version number (if entered). This is not the internal version counter.

Editor: Shows the user who last edited the document.

For folders only:

ELOINDEX: This field is for the filing definition. When filing documents automatically, ELO identifies where to file the document through the ELOINDEX.

'Extra text' tab

Information

This tab only appears in gen. 1 metadata forms.

In this text field, you can enter information that is not covered by the other fields, for example a more exact description or a comment. The field can also be used for script settings.

'Options' tab

The *Options* tab is where you specify the characteristics and behavior of an entry. Depending on whether you are entering metadata for a document or a folder, different settings will be displayed.

Metadata

Available forms < Basis Options Permissions Version history Additional information

Filter

Personal identifier

End of deletion period

End of retention period

Entry type: Word

Font color: System color

Translate short name

Document status: Version control enabled

Document path: basis

Encryption: No encryption

Add to full text database

Approval document

Start point for replication

Expand keyword list automatically ⓘ

Outgoing invoice

OK Cancel

General options

The following options are available for all folders and documents on the *Options* tab:

Information

You will find more information on the *Personal identifier*, *End of deletion period*, and *End of retention period* fields in the chapters *Identify personal data* and *Delete entries with personal data*.

Entry type: This option is used to specify the type of the entry, e. g. a Word or PDF document. This setting determines the icon that is displayed in the list view in ELO.

Font color: Select a color for the entry to improve the visual clarity of your repository structure.

Translate short name: If this option is enabled, the short name of the entry is translated into the selected display language.

Please note

In order for the translation to be displayed, a translation for the short name must have been entered in the translation table. You also need to configure the metadata form. If necessary, contact your system administrator.

Start point for replication: This option enables you to specify a folder as the starting point for replication. The next time replication takes place, the folder is placed in the *Replication Base* of the target repository. The administrator must insert the new folder at the desired location in the target repository. This enables you to replicate parts of repositories even if they have not been filed in identical structures. You will find more information in the [ELO Replication](#) documentation.

Object ID and GUID: The first number in this field is the internal ELO object ID. This entry is primarily for information purposes and cannot be changed. The object ID is required when testing the checksum, for example.

The character string in brackets specifies the GUID of the entry. The GUID (Globally Unique Identifier) is a unique identification number. This is automatically assigned and cannot be modified. This enables you to identify every entry uniquely, even outside of the repository.

Filed by: The user who created the entry is entered here.

Options for documents

The following options are only available for documents:

- Document status
- Document path
- Encryption
- Add to full text database
- Approval document
- File name

Document status: Select the editing status of the entry from the drop-down menu:

- **Version control disabled:** Only one version of the document is saved. The previous version is deleted and is no longer available.

Important

If you select this option, the previous version is overwritten each time you save. The *Document > Versions > Load new version* function overwrites the current version, and does not create a new one. For this reason, we do not recommend using this option.

If you attach files to documents without version control, only one file can be attached. Attaching another file overwrites the first attachment.

-

Version control enabled: If the document is edited, a new version is created. All changes are documented. Older versions can be restored.

- Non-modifiable: ELO does not allow changes to the document and its metadata.

Warning

The document status *Non-modifiable* cannot be reversed.

Document path: This is the document path (storage path) that has been set for the entry.

Encryption: You can select an encryption key here if you want to encrypt documents. This is recommended, e. g. if documents should only be available to a specific set of users. The encryption key password must be entered when opening a document. Encryption keys are defined by your administrator. You will find more information here: [Encryption keys](#).

Important

The encryption process is irreversible. Encrypted documents remain encrypted.

Add to full text database: Enable this option to add the document to the full text database. This function indexes words so that they are available in the search.

Approval document: If this option is enabled, new versions of the document do not automatically become the working version. Users with the right *Author for approval documents* determine which version of the document should be the working version.

Two attributes separate an approval document from a normal document.

- After editing, a new version is created when checking in a document. The new version is not automatically set as the working version. To set a document version as the working version, use the function *Set as working version (Ribbon > Document > Document versions)*.
- Before editing an approval document, the *Check out and edit* dialog box opens. In this dialog box, users can choose whether they want to check out and edit the working version or the newest document version.

File name: The file name of the document as stored outside of ELO, for example.

Options for folders

The following options are only available for folders:

- Sort order
- Enable quick preview for documents in the folder

Sort order: This is where you can define how the contents of the corresponding folder will be sorted:

- Filing date: The entry with the most recent filing date is at the bottom.
-

By filing date descending: The entry with the most recent filing date is at the top.

- Alphabetical: Entries are sorted ascending from A to Z.
- Alphabetical descending: Entries are sorted descending from Z-A.
- Date: The entry with the most recent document date is at the bottom.
- By date descending: The entry with the most recent document date is at the bottom.
- Manual: You can move the entries within the folder manually. To do so, the folder must be opened in the list view.

Enable quick preview for documents in the folder: Use this option to view the first document in a folder in the viewer pane as soon as you click the folder.

'Permissions' tab

The users that have access rights to the selected entry are listed on the *Permissions* tab. You can change the settings, provided you have the corresponding permission.

The screenshot shows the 'Permissions' tab in the ELO Java Client. The window title is 'Metadata'. The 'Permissions' tab is active, showing a list of users and groups with their permissions. The 'Folder' category is selected in the left sidebar. The 'Add user/group' field is at the top, and a list of users is shown below it. The 'ACCOUNTING.GRP_BASE_PAC' user is selected. To the right, there are checkboxes for permissions: View (R), Change metadata (W), Delete (D), < Edit > (E), Edit list (L), and Set permissions (P). Below these is a section for 'Members of the group' which is currently empty. At the bottom, there are buttons for 'Personal' and 'AND group', and a checkbox for 'Expand keyword list automatically'. The 'OK' and 'Cancel' buttons are at the bottom right.

Add user/group: Search for the desired user or group in this field. Suggestions will appear as you type.

Select the corresponding suggestion to select a user or a group.

Alternative: If you select the triangle to the right of the *Add user/group* field, this will open a drop-down menu. This menu contains a list of the users and groups you selected recently.

In the middle column, you can see which users or groups have already been assigned permissions for the selected entry and which permission settings apply.

To edit the permissions settings, select an entry in the middle column and select or clear individual permissions.

The following options are available:

Access right	Description
View (R)	View entries and metadata, add annotations
Change metadata (W)	
Delete (D)	Mark entries as deleted. Only users with administrative rights can delete entries permanently. <ul style="list-style-type: none"> • Documents: Edit documents, e.g. check in, check out, load new version, change working version.
Edit (E)	<ul style="list-style-type: none"> • Folders: No effect. If this access right is granted to folders, entries stored in them can automatically inherit this access right.
Edit list (L)	Folders: Change folder contents, e.g. create, move, copy, or remove documents in the folder, insert or delete reference.
Set permissions (P)	Change permissions

Information

Options that are not applicable are shown in italics and enclosed in pointy brackets.

Personal (orange user icon): Use the *Personal* button to assign yourself sole access to the respective entry. All other permissions will be revoked.

AND group: AND groups are useful if you only want to assign permissions to the users in a group that are also members of another group. To create an AND group, select two groups in the middle column and select *AND group*.

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

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

Remove permissions: To remove all permissions from a user or group, select the X icon next to the selected user or group.

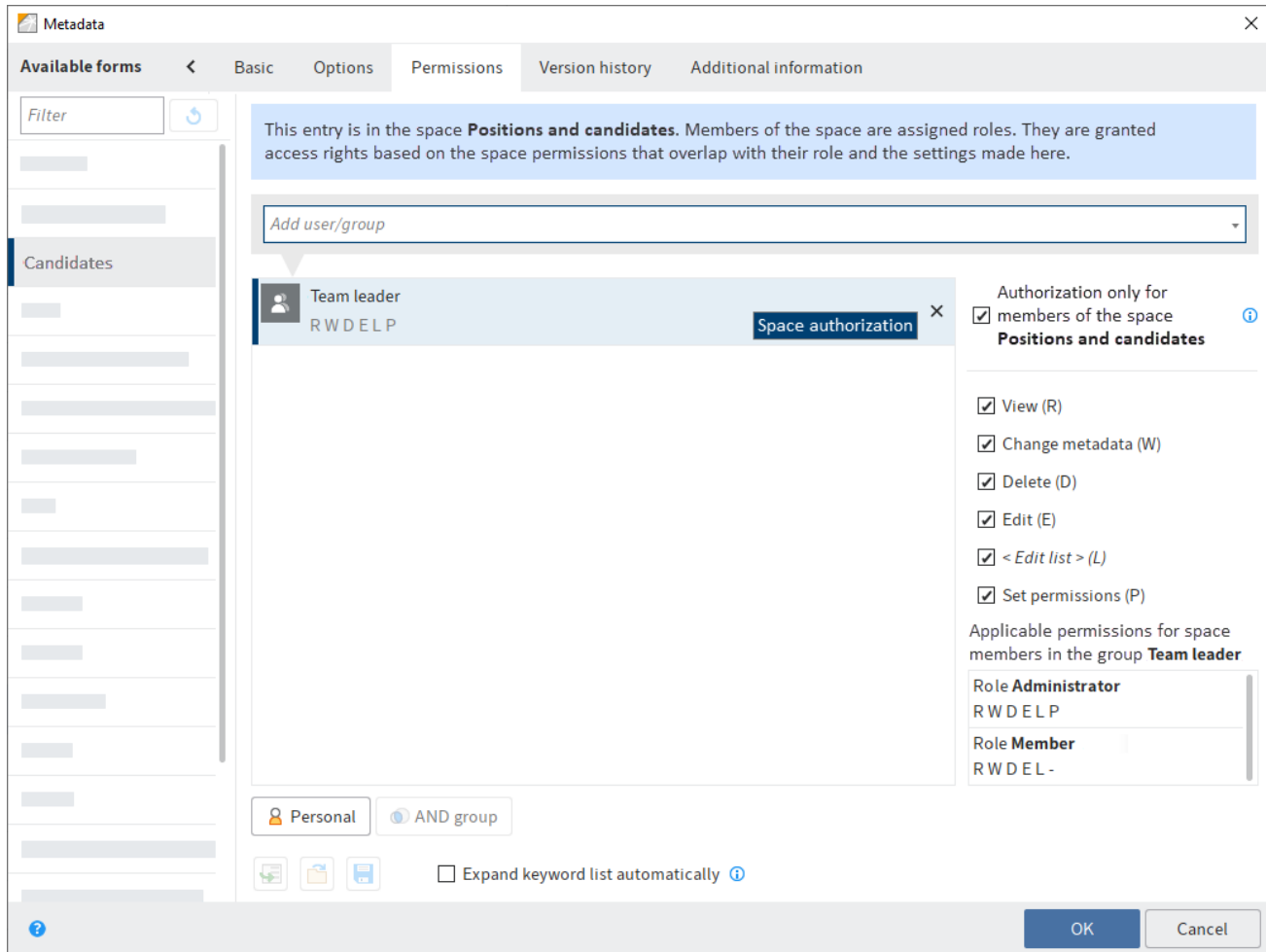
Please note

Keep in mind that when you revoke your own read permissions on an object, you can no longer see the entry in the repository. If you remove the *Set permissions* right, you will no longer be able to edit the permissions settings.

Permissions for entries in spaces

There are additional authorization options for entries that were created in a space.

You can find more information on spaces in the Spaces section.



Authorization only for members of the space<space name>: Users and group members granted this permission can only access the entry if they are members of the corresponding space.

Information

This option only appears for entries created in a space. For entries created elsewhere but displayed in a space, the permissions of the entry in the repository apply.

If you enable this option, the permissions granted to group members according to their role in the space overlap with the access rights granted in the *Metadata* dialog box.

The permissions to the entry at the individual user level also overlap in accordance with this.

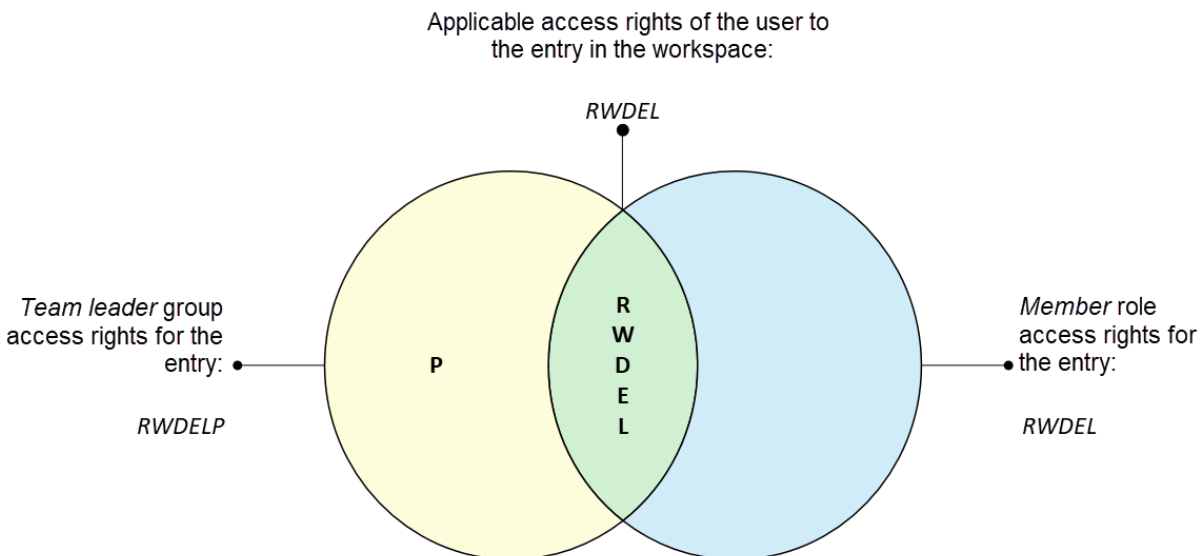
Applicable permissions for space members in the group **Team leader**

Role Administrator	
RWDEL P	
Role Member	
RWDEL -	

You can see the permissions in effect when you select a user or group in the *Metadata* dialog box.

Example

A user has the *Member* role in the *Positions and candidates* workspace. Members have *RWDEL* access rights for entries. The user is also a member of the *Team leader* group. In the *Metadata* dialog box, this group has all access rights for the entry.

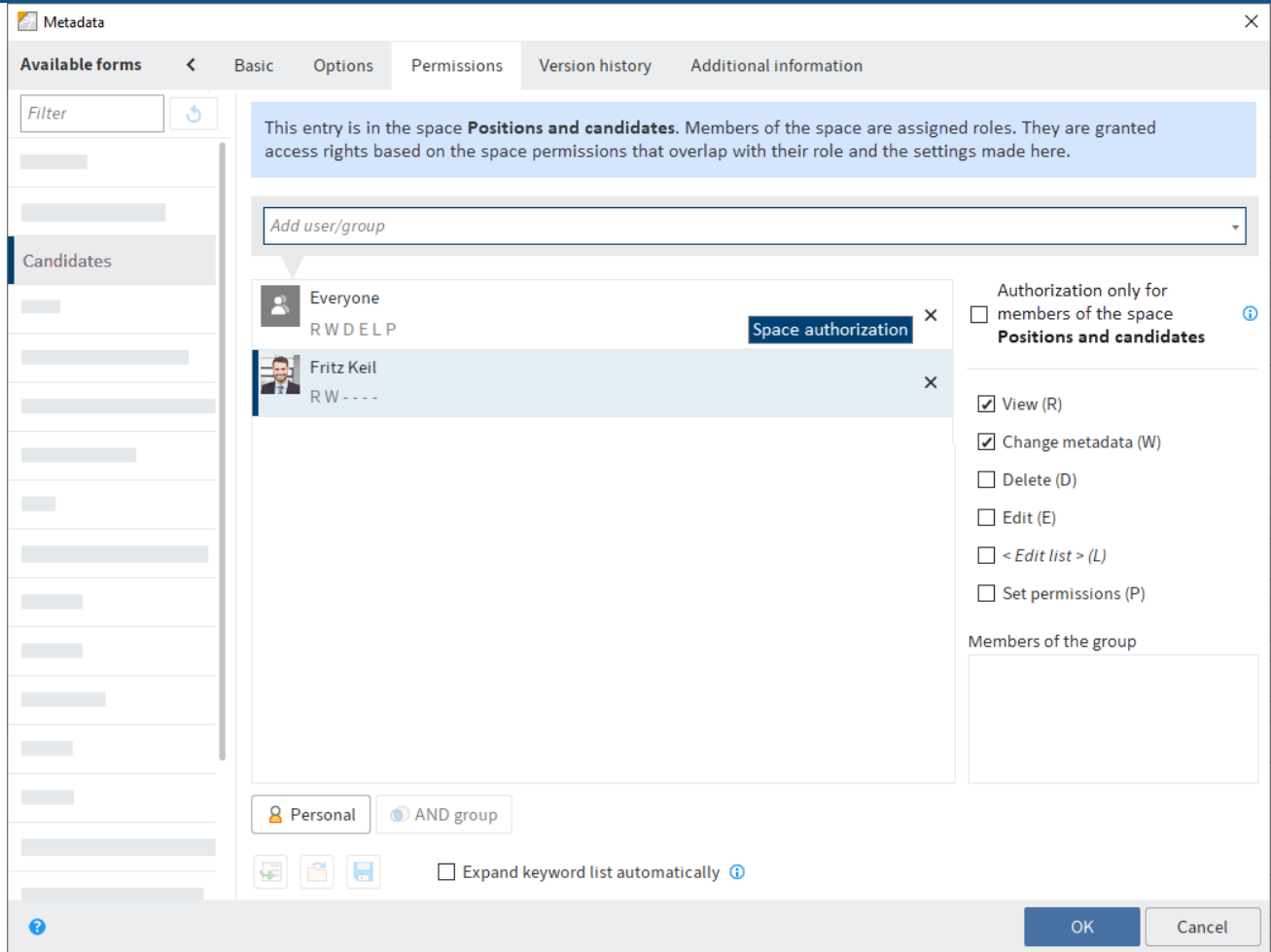


The user only has *RWDEL* access rights for this entry because only these access rights overlap.

Other members of the *Team leader* group will not have access to the entry unless they are also members of the workspace.

Grant a non-member access to an entry

You can grant users who are not members of a space access to entries in the space. Users can open these entries from the search or with ELO links, for example.



Example



The head of HR wants to grant a head of department access to an application created in the HR workspace. The head of department needs to be able to read the application and edit the metadata. The head of HR can add the head of department on the *Permissions* tab and assign him the *R* and *W* access rights.

Outlook

If you change the permissions of a folder in the *Metadata* dialog box, the new permissions can be passed on to the child entries (child folders and documents). After you have changed the permissions, the *Permissions changed* dialog box opens. Specify what effects this change should have.

Permissions modified ×

You have changed the current permissions of the selected folder. You can pass on the permissions to child entries.

New	 GRP_SECR	R W D E L P
Removed	 Farrell	R W D E L P

Select whether you want to pass on the permissions to child entries.

Do not pass on permissions
 Pass on permissions to child entries
 Only apply changes, keep other permissions ⓘ

Apply to:

Folders and documents ▼

?
OK
Cancel

Please note

The changes do not affect references, since they retain the permission settings of the original entry.

Choose from the following options:

Do not pass on permissions: The changes are not applied to the documents and child folders in the folders.

Pass on permissions to child entries: All permissions are passed on to the entries in the folder.

Only apply changes, keep other permissions: Only permissions are passed on that result in changes to permissions for the documents and child folders in the folder.

Apply to: Using the drop-down menu, select whether to apply the changes to all child entries or only folders/documents.

'Version history' tab

With version-controlled documents, changes to the metadata are documented. You will find this documentation on the *Version history* tab.

The screenshot shows the 'Metadata' dialog box with the 'Version history' tab selected. The dialog has a sidebar on the left with a 'Filter' input and a list of items. The main area contains a table of version history entries and a 'Metadata form: Order' section.

Editor	Date	Workstation	UTC Time	Type
Administrator	Today 10:48 AM	DESKTOP-29H776Q	Today 8:48 AM	Default
Administrator	Nov 28, 2022, 10:55 A...		Nov 28, 2022, 9:55 AM	Default

Field	Value
Permissions	Everyone(RWDELP)
Date	Nov 28, 2022
Short name	Order Smith
Order date	5/16/2021 12:00:00 AM

At the bottom of the dialog, there are icons for file operations and a checkbox labeled 'Expand keyword list automatically'.

The version history contains two panes:

In the top part, you can see which users made changes and when.

The changes that the selected user made are shown in the lower part.

'Additional information' tab

Information

This tab is only displayed if you have been granted authorization by an administrator.

The *Additional information* tab provides additional fields in the database (map fields). These fields can be used for scripts, workflows, and other purposes.

Identify personal data

The *Options* tab in the *Metadata* dialog box contains three fields that allow you to find entries with personal data and delete them in due time.

Personal identifier: If the entry contains a personal identifier, enter information that enables you to identify the relevant person in this field. This term is intended to help you find the entry using the metadata search. For this reason, you need a company-wide system for assigning these terms. This will help you find entries containing a user's personal data. You can also search all entries containing personal data – regardless of the individual.

End of deletion period: Enter the date on which the entry must be deleted at the latest. This date must come after the date you have entered under *End of retention period*. You can select a date using the calendar icon in the field.

Please note

If you do not complete the *Personal identifier* and *End of deletion period* fields, a dialog box will appear indicating that a personal identifier has not been specified. You can disable this dialog box under *Ribbon > User menu [your name] > Configuration > Dialog boxes*.

End of retention period: Enter the date up to which the entry has to be retained. The entry cannot be deleted before the entered date. You can select a date using the calendar icon in the field.

Please note

The retention period must end before the deletion period.

Information

You can set a retention period in the ELO Administration Console. If an entry is filed with the corresponding metadata form, the field *End of retention period* is completed automatically.

Delete entries with personal data

The purpose of marking entries with personal data is to be able to delete the corresponding entries in accordance with legal requirements. You can delete entries with personal data in the following ways:

- Via the search
 - With the *Delete expired documents* function Method using the search
1. To delete entries with personal data, first perform a search. You can narrow down your search based on the *End of deletion period* or *End of retention period* fields.
 2. In the search results, select the entries that have to be deleted. To select multiple entries, press the CTRL key and click all the entries you want to select. If you want to select all entries or all entries you want to select are in a row, press the SHIFT key then click the top-most and bottom-most entry you want to select.
 3. Once you have marked the entry or entries in the search results, select *Organize > Delete* on the ribbon. Select *Delete in ELO* in the selection dialog box.

Result

The entries can no longer be seen in the *Repository* work area.

Important

The entries are not deleted permanently, just marked as deleted. This tells the administrator that the documents need to be removed from ELO permanently. You can find more information under Show deleted entries and Delete permanently.

Method using the 'Delete expired documents' function

Please note

The function *Delete expired documents* not only deletes entries containing personal identifiers, but all entries whose retention period has passed.

1. On the ribbon, select *Organize > System > Delete expired documents*.

The *Delete expired documents* dialog box appears.

2. Specify whether you want to delete *Documents only* or *Documents and folders* with expired retention periods.

Result

The entries can no longer be seen in the *Repository* work area.

Important

The entries are not deleted permanently, just marked as deleted. This tells the administrator that the documents need to be removed from ELO permanently. You can find more information under Show deleted entries and Delete permanently.

Enter metadata with ELO Click OCR

The integrated text recognition feature can be used as a tool for entering metadata. ELO Click OCR transfers text from a document into the metadata form. This prevents users from making manual data entry errors. The following example explains how to proceed.

Click OCR can be used in all work areas. In this example, we demonstrate how the function works in the *Intray* work area.

Information

An OCR service needs to be installed for ELO Click OCR to work.

Method

1. Open the *Intray* work area.
2. Select the document that you want to edit the metadata of.

The document appears in the viewer pane.

- 3.

Select *Organize > Move* on the ribbon.

The *Metadata* dialog box opens.

4. Select the desired metadata form.
5. Click the field you want to apply the metadata to.

The cursor blinks in the selected field.

<table border="0"> <tr> <td><u>Order date</u></td> <td>03/01/2010</td> </tr> <tr> <td><u>Customer advisor</u></td> <td>Felix Unger</td> </tr> <tr> <td><u>Contact person</u></td> <td>Sandra Renz</td> </tr> </table>	<u>Order date</u>	03/01/2010	<u>Customer advisor</u>	Felix Unger	<u>Contact person</u>	Sandra Renz	<p>Invoice</p> <table border="0"> <tr> <td><u>Invoice number</u></td> <td>2010.100</td> </tr> <tr> <td><u>Date</u></td> <td>10/02/2013</td> </tr> <tr> <td><u>Order number</u></td> <td>00004</td> </tr> <tr> <td><u>Customer number</u></td> <td>0005670</td> </tr> </table>	<u>Invoice number</u>	2010.100	<u>Date</u>	10/02/2013	<u>Order number</u>	00004	<u>Customer number</u>	0005670
<u>Order date</u>	03/01/2010														
<u>Customer advisor</u>	Felix Unger														
<u>Contact person</u>	Sandra Renz														
<u>Invoice number</u>	2010.100														
<u>Date</u>	10/02/2013														
<u>Order number</u>	00004														
<u>Customer number</u>	0005670														



The screenshot shows the 'Invoice' metadata form. The 'Customer number' field is highlighted in yellow, and a tooltip is displayed above it containing the text '0005670'. A mouse cursor is pointing at the tooltip. The rest of the form fields are: Invoice number (2010.100), Date (10/02/2013), and Order number (00004).

6. Move the mouse pointer to the part of the document (preview) containing the information you require.

Information

If ELO Click OCR recognizes a text element (word or number), the element that has been found is highlighted in yellow and a tooltip with the recognized text appears.

7. Click the text you want to transfer to the metadata form.

Information

If you want to transfer multiple terms after another, select each individual term while holding the SHIFT button. Release the mouse button after each term. Repeat the process until you have transferred all desired terms.

Result

The recognized text information is transferred to the selected field.

Permissions

Available in: *Ribbon > Organize > Properties*

This function opens the *Permissions* tab in the *Metadata* dialog box. This is where you set the permissions of a folder or a document. You will find more information under *Metadata*.

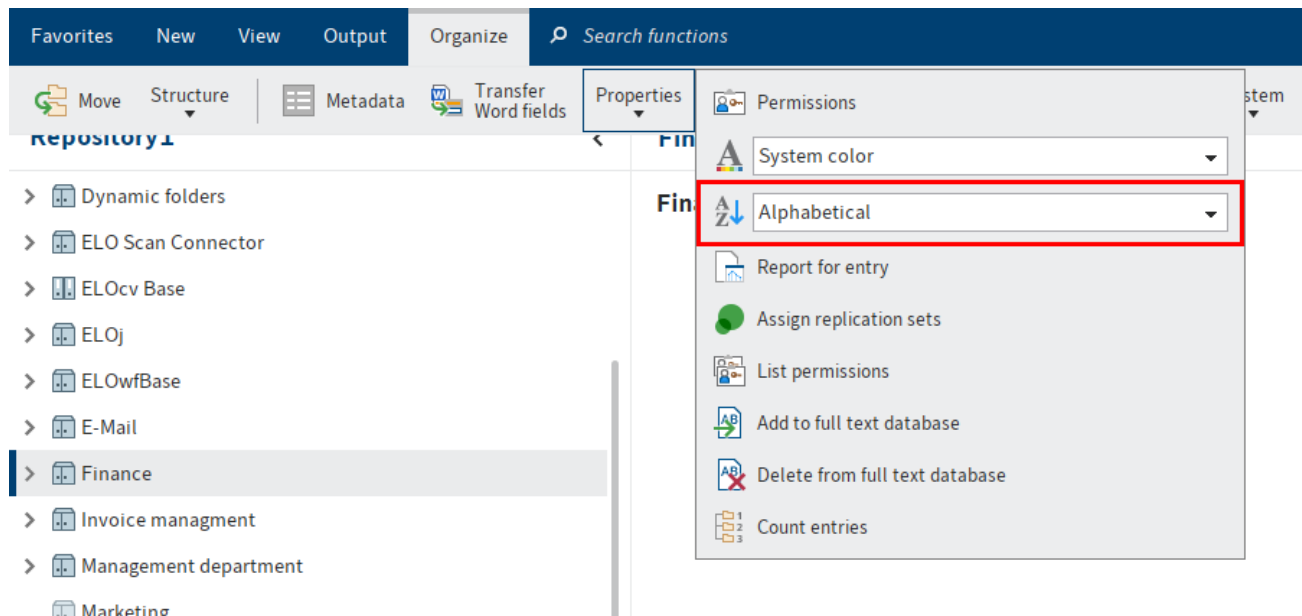
Font color

Available in: *Ribbon > Organize > Properties*

Use this function to change the font color of a selected document or folder.

Sort order

Available in: *Repository work area > Ribbon > Organize > Properties*



Use this function to change the sort order within a selected folder. You can choose between different sort orders in a drop-down menu:

Sort manually

If you select the option *Manual*, you can sort the child entries in the folders later on.

1. Select a view profile that includes the *Content* view element.
2. Click the folder that you want to sort manually.
 - Optional: If you have not already done so, open the *Content* view element.
3. In the *Content* view element, click the entry (folder or document) that you want to move.
4. Drag and drop the entry to the selected location.

The sort order is changed.

Information

You will find other options for sorting entries in the list and tile view on the toolbar.

Report for entry

Available in: *Ribbon > Organize > Properties*

Use this function to open an overview with information on the currently selected entry. Use the *Configure report* dialog box to specify which information to include in the overview. For example, you can define which actions will be reported or which period the report should refer to.

Choose from the following options:

Number of entries: Specify the maximum number of entries the report should contain.

Date: Enter the period which you want to create the report for.

User: With the *User* field, you can search for users and groups. As soon as you start typing, a drop-down menu with possible matches appears. Select the user/group for the report.

Actions: Select the actions you want to be recorded in the report.

Select all: Use this to Select all actions.

Select none: Use this to disable all actions.

OK: Select *OK* to create the report with the new settings.

The *Report* dialog box opens.

Date	User	Object ID	Action ID	Action name	Co
Yesterday 11:44 P...	Cole	2	157	Folder displayed	Adr
May 18, 2020, 3:03 ...	Administrator	2	157	Folder displayed	Adr
May 18, 2020, 3:00 ...	Administrator	2	157	Folder displayed	Adr
May 13, 2020, 10:2...	Administrator	2	157	Folder displayed	Adr
May 13, 2020, 9:19 ...	Administrator	2	157	Folder displayed	Adr
May 13, 2020, 6:04 ...	Administrator	2	157	Folder displayed	Adr
May 13, 2020, 6:02 ...	Administrator	2	157	Folder displayed	Adr
May 13, 2020, 6:01 ...	Administrator	2	157	Folder displayed	Adr
May 13, 2020, 5:58 ...	Administrator	2	157	Folder displayed	Adr
May 13, 2020, 5:44 ...	Administrator	2	157	Folder displayed	Adr
May 13, 2020, 4:26 ...	Administrator	2	157	Folder displayed	Adr
May 13, 2020, 3:23 ...	Santini	2	157	Folder displayed	Adr

This dialog box contains an overview of the actions that were executed for an entry. The name of the executed action is displayed in the *Action name* column. You will also see what action was performed by whom and when.

Go to: The *Go to* button takes you straight to the respective entry.

Open in read-only mode: Select *Open in read-only mode* to open the respective document in an external application.

Clipboard: Use the *Clipboard* button to copy a selected area in the *Report* dialog box to the clipboard. This allows you to save parts of the report in an external document, for example.

Details: Select the *Details* button to open the *Details of* dialog box. The *Details of* dialog box lists the permissions and group membership of the user who has triggered the respective report entry.

Information

The *Details of* dialog box is only available for report entries with the action name *Indexserver: Logon* or the action ID *501*. This action is only evaluated when you execute a report for the top repository level and the report settings (*Open ELO* action) have been configured accordingly.

Options: Use the *Options* button to open the *Configure report* dialog box. Make the changes for the report in the *Configure report* dialog box.

Assign replication sets

Available in: *Ribbon > Organize > Properties*

The replication set is a characteristic that you assign to individual repositories in order to replicate them in another repository. Each replication set stands for one repository. Replication sets enable you to synchronize data between multiple locations. The replication sets must have already been mapped to the entries using the ELO Replication module.

You will find detailed information in the [ELO Replication](#) documentation.

Assign replication sets

Replication sets	Name	ID	Mobile	Description
	Stuttgart/EXTEN01	0	No	
	Hamburg/EXTEN03	1	No	
	Frankfurt/EXTEN02	2	No	
	Berlin/EXTEN04	3	No	

Settings

 Set

 Differences

 Cut

 Include child entries

In the *Replication sets* field, you can see which replication sets have already been mapped to the entry. To add a new replication set, click *Add* and select a new replication set.

Please note

Replication sets are inherited upward to parent folders in the repository structure. To prevent inheritance, select the *Start point for replication* option in the *Metadata* dialog box of the folder you want to replicate.

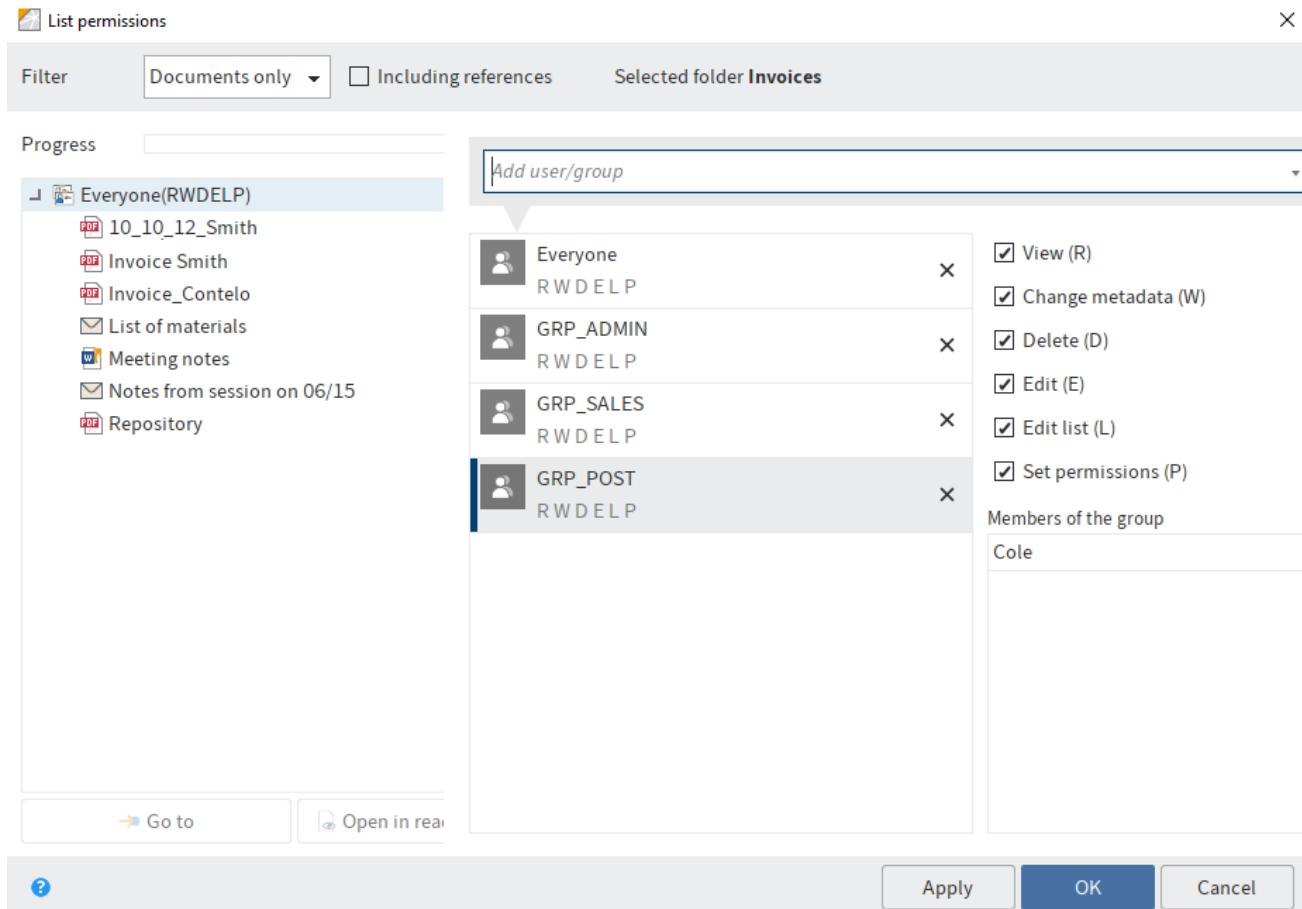
List permissions

Available in: *Repository work area > Ribbon > Organize > Properties*

The *List permissions* function enables you to view the permissions for each folder in ELO. This function helps administrators to quickly find information on the permission structures in the repository.

Information

The function is only available for folders. You will find information on the permissions of a document on the *Permissions* tab in the *Metadata* dialog box.



In this dialog box, you see the permissions for a selected folder including its child entries.

Filter: In the drop-down menu, select which child entries (*All entries*, *Folders only* or *Documents only*) you want to view the permissions of.

Including references: Select the option *Including references* if you also want to list permissions for references.

Selected folder: Shows the folder you selected.

Progress: While the system is searching for permissions for the selection you made, a green bar appears next to *Progress* to indicate the expected duration of the process.

The column below *Progress* lists the permission sets found in the selected folder. If you expand one of the sets (triangle symbol), you can see which child entries use this permissions set.

Go to: The *Go to* button takes you straight to the respective entry in ELO.

Open in read-only mode: Select *Open in read-only mode* to open the respective document in an external application.

Add user/group

Search for the desired user or group in the *Add user/group* field. Suggestions will appear as you type.

Click the corresponding suggestion to select a user or a group.

Alternative: If you select the triangle to the right of the *Add user/group* field, this will open a drop-down menu. This menu contains a list of the users and groups you selected recently.

In the middle column, you can see which users or groups have already been assigned permissions for the selected entry and which permission settings apply.

Edit permissions settings

To edit the permissions settings, select an entry in the middle column and select or clear individual permissions.

The following options are available:

Access right	Description
View (R)	View entries and metadata, add annotations
Change metadata (W)	
Delete (D)	Mark entries as deleted. Only users with administrative rights can delete entries permanently. <ul style="list-style-type: none"> • Documents: Edit documents, e.g. check in, check out, load new version, change working version.
Edit (E)	<ul style="list-style-type: none"> • Folders: No effect. If this access right is granted to folders, entries stored in them can automatically inherit this access right.
Edit list (L)	Folders: Change folder contents, e.g. create, move, copy, or remove documents in the folder, insert or delete reference.

Access right	Description
Set permissions (P)	Change permissions

Information

Options that are not applicable are shown in italics and enclosed in pointy brackets.

Personal (orange user icon): Use the *Personal* button to assign yourself sole access to the respective entry. All other permissions will be revoked.

AND group: AND groups are useful if you only want to assign permissions to the users in a group that are also members of another group. To create an AND group, select two groups in the middle column and select *AND group*.

Members of the group

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

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

Remove permissions

To remove all permissions from a user or group, select the X icon next to the selected user or group.

Apply: Select *Apply* to save the changes. The dialog box remains open.

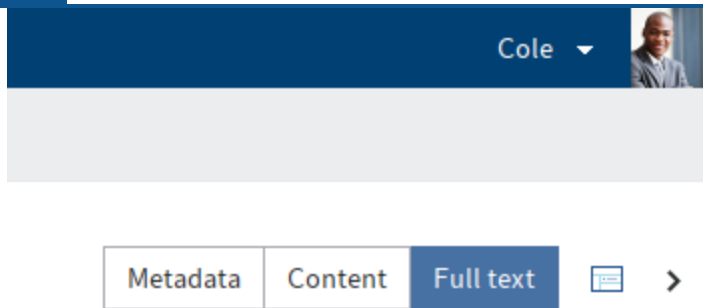
OK: Select *OK* to save changes and close the dialog box.

Cancel: Select *Cancel* to close the dialog box without saving the changes.

Add to full text database

Available in: *Ribbon > Organize > Properties*

Use this function to add the contents of a document to the full text database. The document must contain full text information. The full text information is written to the full text database and will be used when searching for documents.



You can view the document content in full text mode in the viewer pane. This enables you to search the text for specific terms.

Delete from full text database

Available in: *Repository work area > Ribbon > Organize > Properties*

Use this function to remove a document including its text contents from the full text database. This means that you cannot find the document with the full text search. This function is also available even if the selected document does not contain any full text information.

Count entries

Available in: *Ribbon > Organize > Properties*

Use this function to count entries in the currently selected folder. You can also see the amount of memory that the entries in the selected folder are using.

You can specify which entries you want to count. In addition, you can save the result as a PDF.

Workflows for this entry

Use this function to open an overview with all workflows that exist for this entry. You can adjust the settings for viewing workflows.

Information

Hold down the left mouse button to adjust the size of the viewing panes. Drag the splitter bar at the right-hand corner of each window.

The workflows are listed as a table on the left-hand side. The selected workflow is shown as a diagram on the right-hand side. The status of the respective node is indicated by the colors in the diagram.

- Green: Node completed successfully
- Blue: Current node
- Red: Escalated node
- Gray: Future node

Status

Select which workflows you want to view.

Information

You will only see workflows that you have permissions for.

Choose from the following options:

- Active: If this option is selected, you will only see active workflows.
- Completed: If this option is selected, you will only see workflows that are completed.
- All workflows: If this is selected, all workflows will be displayed.
-

Passed deadlines only: If this option is selected, you will only see escalated workflows. This option can be selected in combination with *Active*, *Completed*, or *All workflows*.

- Load fields: If this option is enabled, the available metadata is shown in the drop-down menu under the columns with the title *Index*. This option can be selected in combination with *Active*, *Completed*, or *All workflows*. This option can also be combined with the *Passed deadlines only* option.

Please note

The *Load fields* option can increase loading times.

User

To filter the view, search for a user or group in the *All users and groups* search field. Suggestions will appear as you type. Select the desired user or group.

To cancel the selection, click the X icon next to the selected user or group.

Once you have selected a user/group, you can narrow down the list by selecting additional filter options:

- Owner: If this option is enabled, you only see workflows that the selected user/group is the owner of. The owner is the user who started the workflow.
- Any node: If this option is enabled, you only see workflows in which the selected user/group is entered as the editor of at least one node.
- Active node: If this option is enabled, you only see workflows in which the selected user/group is entered as the editor of the node.

Start date

from/to: Define how long you want the workflow to show up in the overview. The start date of the workflow must be within this period.

Display mode

Choose from the following options:

- Diagram view: If you select this option, the drop-down menu and the diagram for the selected workflow are displayed.
- List view: If you select this option, the drop-down menu and a detailed overview of the selected workflow are displayed.
- Form view: Select this option to view the drop-down menu and the workflow form for the selected workflow. The workflow form must be specified in the start node.
- No details: If this option is enabled, only the drop-down menu is displayed.

Apply: Select *Apply* to save the changes. The dialog box remains open.

OK: Select *OK* to save changes and close the dialog box.

Cancel: Select *Cancel* to close the dialog box without saving the changes.

You will find more information on the topic of *workflows* in the [ELO workflow](#) documentation.

Reminders for entry

Available in: *Ribbon > Organize > Overviews*

Use the *Reminders for entry* function to open an overview of the reminders that have been created for this entry.

You will find more information on creating reminders here: [Create reminder](#).

Workflow overview

Available in: *Ribbon > Organize > Overviews*

The screenshot shows the 'Workflow overview' dialog box. It features a top section with filters for Status (Active, Completed, All workflows), User (All users and groups), Start date (from Mar 3, 2020), and Display options. Below this is a list of workflows with columns for Name, Template, and Type. The 'Incoming Invoice' workflow is selected. The main area displays a workflow diagram on a grid, showing a sequence of steps: 'Incoming Invoice' (Cole, Start: May 29, 2020, 2:37 AM), 'First check' (Cole, Start: May 29, 2020, 2:37 AM), 'passing on to account department' (Amount>=5000), 'over 5000€' (Byte), 'under 5000€' (Cole), and 'Cancel approval'. A 'Node settings' panel on the right allows configuration for the selected node, including General settings like Type, Icon, User, Priority, and Note. The dialog has 'Apply', 'OK', and 'Cancel' buttons at the bottom.

This dialog box contains an overview of all existing workflows. To view the details of a workflow, select the corresponding workflow from the list on the left.

Information

Hold down the left mouse button to adjust the size of the viewing panes. Drag the splitter bar at the right-hand corner of each window.

The workflows are listed as a table on the left-hand side. The selected workflow is shown as a diagram on the right-hand side. The status of the respective node is indicated by the colors in the diagram.

- Green: Node completed successfully
- Blue: Current node
- Red: Escalated node
- Gray: Future node

Status

Select which workflows you want to view.

Information

You will only see workflows that you have permissions for.

Choose from the following options:

- Active: If this option is selected, you will only see active workflows.
- Completed: If this option is selected, you will only see workflows that are completed.
- All workflows: If this is selected, all workflows will be displayed.
- Passed deadlines only: If this option is selected, you will only see escalated workflows. This option can be selected in combination with *Active*, *Completed*, or *All workflows*.
- Load fields: If this option is enabled, the available metadata is shown in the drop-down menu under the columns with the title *Index*. This option can be selected in combination with *Active*, *Completed*, or *All workflows*. This option can also be combined with the *Passed deadlines only* option.

Please note

The *Load fields* option can increase loading times.

User

To filter the view, search for a user or group in the *All users and groups* search field. Suggestions will appear as you type. Select the desired user or group.

To cancel the selection, click the X icon next to the selected user or group.

Once you have selected a user/group, you can narrow down the list by selecting additional filter options:

- Owner: If this option is enabled, you only see workflows that the selected user/group is the owner of. The owner is the user who started the workflow.
- Any node: If this option is enabled, you only see workflows in which the selected user/group is entered as the editor of at least one node.
-

Active node: If this option is enabled, you only see workflows in which the selected user/group is entered as the editor of the node.

Start date (from/to)

Define how long you want the workflow to show up in the overview. The start date of the workflow must be within this period.

Display mode

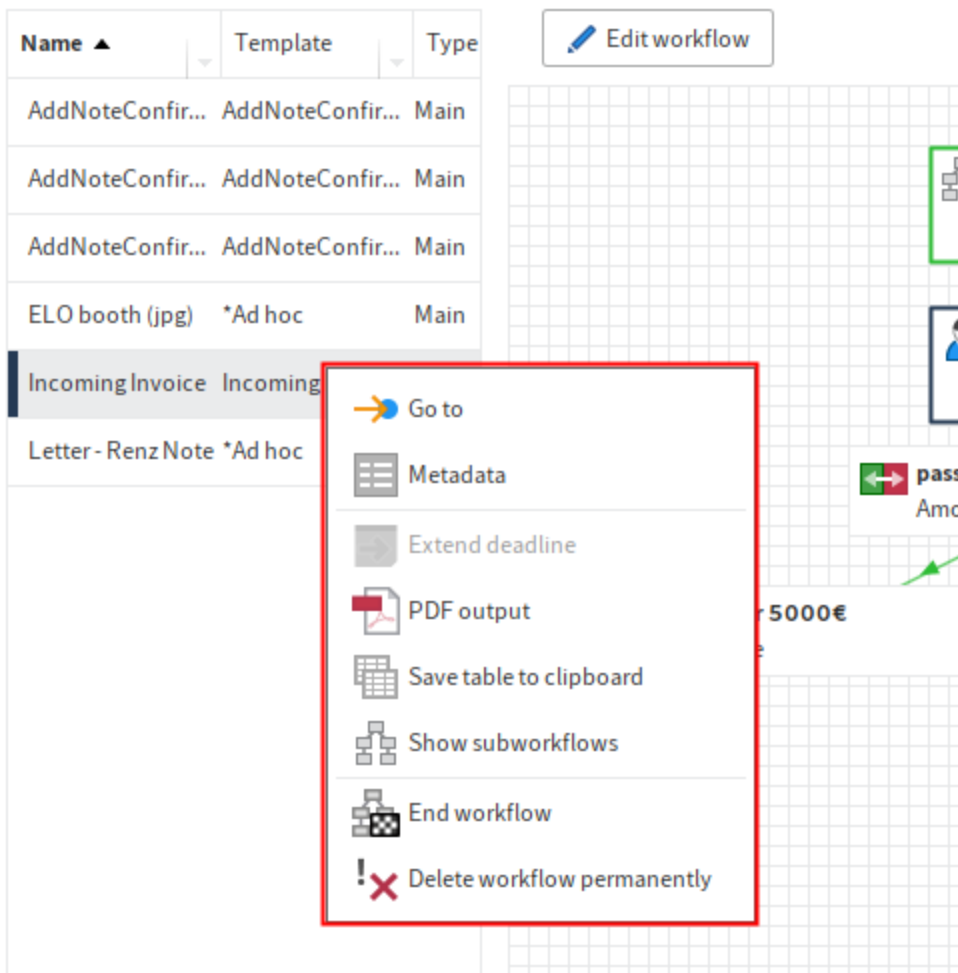
Choose an option for displaying the workflows.

Choose from the following options:

- Diagram view: If you select this option, the drop-down menu and the diagram for the selected workflow are displayed.
- List view: If you select this option, the drop-down menu and a detailed overview of the selected workflow are displayed.
- Form view: Select this option to view the drop-down menu and the workflow form for the selected workflow. The workflow form must be specified in the start node.
- No details: If this option is enabled, only the drop-down menu is displayed.

Context menu

Some functions can only be called from the context menu. Right-click the list to open the context menu.



Go to: The *Go to* button takes you straight to the respective entry in the *Repository* work area.

Metadata: The *Metadata* menu item opens the metadata of the respective entry.

Extend deadline: You can edit the workflow deadline with the *Extend deadline* menu item.

PDF output: Select the *PDF output* menu item to save the workflow as a PDF outside of ELO.

Save table to clipboard: If you click the *Save table to clipboard* menu item, the data for the selected workflow is copied to your Windows Clipboard. From here, you can transfer the data to an external program.

Show subworkflows: The *Show subworkflows* menu item opens a dialog box that shows you the subworkflows associated with the selected workflow.

End workflow: You can stop the selected workflow with the *End workflow* menu item. If you do so, you can no longer edit the workflow.

Delete workflow permanently: Click *Delete workflow permanently* to remove the selected workflow from the system. You will be asked to confirm that you really want to delete the workflow.

Important

Permanently deleted workflows cannot be restored.

General buttons

Apply: Select *Apply* to save the changes. The dialog box remains open.

OK: Select *OK* to save changes and close the dialog box.

Cancel: Select *Cancel* to close the dialog box without saving the changes.

You will find more information on the topic of *workflows* in the [ELO workflow](#) documentation.

Reminders overview

Available in: *Ribbon > Organize > Overviews*

The screenshot shows the 'Reminders overview' dialog box. At the top, there are filter fields for 'User' (set to Administrator), 'Deadline' (with 'from' and 'to' fields), and 'Created on' (with 'from' and 'to' fields). Below these is a table of reminders:

Type	Priority	Name	Deadline	Created on
	B	Invoice Contelo	May 2, 2019, 7:1...	May 2, 2019, 7:1...
	B	Order 764539859295982743	Apr 15, 2020, 12:...	Apr 15, 2020, 12:...
	B	Contelo	Apr 15, 2020, 12:...	Apr 15, 2020, 12:...
	B	Order 764539859295982743	Apr 15, 2020, 12:...	Apr 15, 2020, 12:...

To the right of the table is a context menu with the following options: 'Go to', 'Open in read-only mode', 'Edit reminder', and 'Delete reminder'. At the bottom of the dialog, there is a status bar with the text 'Administration // ELO-Textreader // Nicht konvertierte Dokumente // 2016 // 08 // 22 // Invo...' and 'OK' and 'Cancel' buttons.

This dialog box contains an overview of your reminders. You can view and edit the reminders here. You can learn how to create reminders here: [Create reminder](#).

Deadline

Under *Deadline*, you can filter the overview by the date of the reminder.

from: Use the *from* field to set the start date of the period that should apply for the filter.

to: Set the end date of the period that should apply for the filter in the *to* field.

Created on

Under *Created on*, you can filter the overview by the date the reminder was created on.

from: Use the *from* field to set the start date of the period that should apply for the filter.

to: Set the end date of the period that should apply for the filter in the *to* field.

Functions

Once you have selected a reminder, the following functions are available:

Go to: The *Go to* button takes you straight to the entry in the *Repository* work area that is linked to the reminder.

Open in read-only mode: Select *Open in read-only mode* to open the respective document in an external application.

Edit reminder: Select the *Edit reminder* button to change the reminder.

Delete reminder: Select *Delete reminder* to mark the selected reminder for deletion. The reminder will be marked red. As soon as you click *OK* and the dialog box closes, all reminders that have been marked for deletion will be removed. If you click *Cancel* or click *Delete reminder* again, the delete action will be reversed.

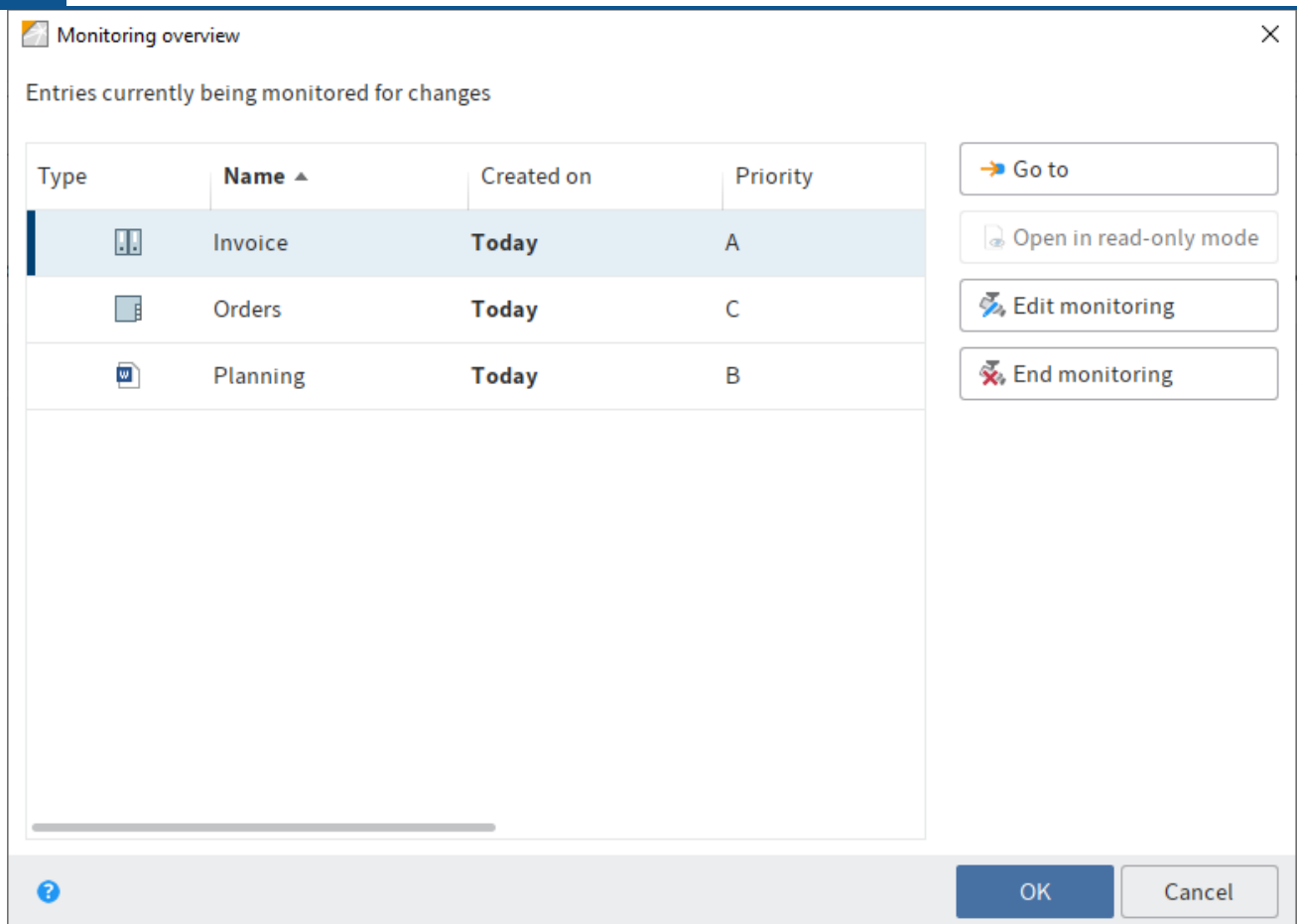
Monitoring overview

Available in: *Ribbon > Organize > Overviews*

This function opens an overview of the entries you are currently monitoring. You can show the filing location, open the entries in read-only mode, edit the monitoring settings, or end monitoring actions.

You see when monitoring began on an entry and which priority level it has. If there are changes to an entry that is being monitored, you will receive a notification in your *Tasks* work area.

To start monitoring on an entry, use the *Monitor changes* function (available in: *Ribbon > New > Create task*).



The following functions are available in the *Monitoring overview* dialog box:

Go to: Opens the filing location of the selected entry.

Open in read-only mode: Select *Open in read-only mode* to open the respective document in an external application.

Edit monitoring: This opens the *Edit monitoring* dialog box. In this dialog box, you can change the name, priority level, and notification settings of a monitoring action that appears in your tasks area.

End monitoring: Select *End monitoring* to end monitoring of the current entry. The entry being monitored is initially marked red. When you select *OK*, the dialog box closes and the entry is no longer monitored. If you close the dialog box with the *Cancel* button, the delete action is reversed.

Delete

Keyboard shortcut: CTRL + DEL

This function enables you to delete

- entries in the *Repository* work area

Warning

The entries (folders or documents) are not deleted permanently. They are hidden and marked for deletion. This tells the administrator that the documents need to be removed from ELO permanently. To delete entries permanently, use the functions Show deleted entries and Delete permanently. They can be restored until the point at which they are permanently deleted.

- workflows, monitoring actions, and reminders in the *Tasks* work area

Only the task is deleted. The corresponding entry remains in the repository.

Please note

Documents in the Intray that have not yet been filed to ELO are permanently deleted with the *Delete* function.

Outlook

The function Delete expired documents enables you to delete entries whose retention period has passed. You can enter the retention period in the metadata when you file the entry.


Show deleted entries


Available in: *Ribbon > Organize > Delete*


Use this function to show deleted entries. Deleted entries are entries that have been removed with the *Delete* function and that have a deletion marker. Entries with a deletion marker are hidden in ELO.

If you show deleted entries, *_[deleted]_* is displayed after the name of the deleted entry. Use the Restore function to revert the deletion process and remove the deletion marker. Use the Delete permanently function to permanently erase deleted entries.

└─ TEST

└─  Damage report 1 [deleted]

└─  Document_without_rights [deleted]

└─  Document1 [deleted]

└─  Test [deleted]

Restore

Available in: *Ribbon > Organize > Delete*

Use this function to remove the deletion marker from an entry in ELO. This allows you to undo the deletion of an entry. This option is only available if the entry has not been deleted permanently.

To restore deleted entries, you must first show the entries again in ELO. Use the Show deleted entries function to do this. The entries are marked with `_[deleted]_` before the short name. Select an entry marked with `_[deleted]_` and select *Restore*. The deletion marker is removed.

If you restore a deleted folder, you can use the *Restore entries deleted on or after* option to define a date limit from which the documents included and deleted in the folder are restored.

Undo

Available in: *Ribbon > Organize > Delete*

Use this function to 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.

Remove lock

Available in: *Ribbon > Organize > Delete*

If a user has checked out an entry, it is locked and cannot be edited by other users. Use this function to remove the lock from a document or folder. Normal users can only remove their own locks. Administrators can also remove locks from documents set by other users.

Important

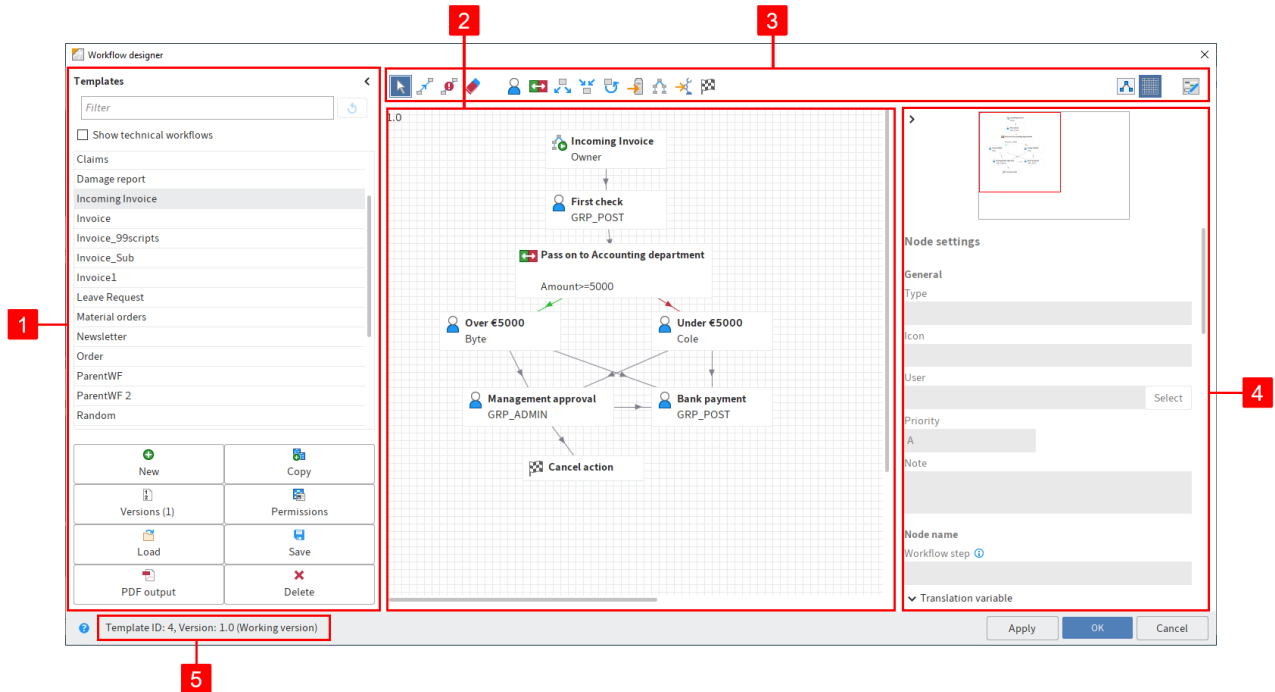
Removing a lock may lead to loss of data or changes being overwritten if the entry or metadata is being edited by another user. To unlock a document for all users, you should use the *Cancel editing* function in the *Check in* dialog box.

For more information on editing an entry, refer to the chapter Edit entry.

Workflow designer

Available in: *Ribbon > Organize > System*

Use this function to open the *Workflow designer*. The *Workflow designer* enables you to create and edit the templates for your workflows.



Select a template to open the template in the graphical view.

Information

Some tools are only available when you are in editing mode. Select *Edit workflow template* to enable editing mode.

The workflow designer consists of the following areas:

1 Templates: All available workflow templates are listed in the *Templates* column on the left-hand side. Click an entry to open the graphical interface. The workflow is displayed as a diagram in the middle of the dialog.

To show technical workflows, check the corresponding check box.

Information

You can show or hide the *Templates* column using the double arrow icon.

In addition, the column contains the following buttons for managing workflow templates:

- New: Create a new workflow template.
- Copy: Copy a workflow template selected in the *Templates* list. This applies the template settings.
- Versions: This is where you manage the versions of a workflow template.
- Permissions: This is where you make the permission settings for the workflow template.
- Load: Load an already created and saved workflow template.
-

Save: Save the workflow template externally.

- PDF output: Create a PDF overview of the workflow template.
- Delete: Delete the selected workflow template.

2 Workspace: In the workspace, the workflow templates are displayed in the graphic view. You can see the steps (nodes) and elements that a workflow consists of and how they are connected.

3 Toolbar: This is where you find the tools for creating and editing a workflow template.

4 Node editor: This area contains a preview window and the *Node settings* area. Define the settings for the individual workflow nodes in the *Node settings* area.

5 Status bar: This is where you find the ID of the workflow template, the current version, and the node ID of the currently selected workflow node.

Apply: Select *Apply* to save the changes. The dialog box remains open.

You will find more information on the topic of *workflows* in the [ELO workflow](#) documentation.

Form designer

Available in: *Ribbon > Organize > System*

The screenshot shows the 'Form designer' application window. The title bar reads 'Form designer'. The ribbon at the top includes the following groups and items:

- Form** (New): A plus icon.
- Template** (Table): A grid icon.
- Tab group** (Insert): A tab icon.
- Refresh** (Assignment): A refresh icon.
- Close** (System): A close icon.

The main workspace is divided into two panes:

- Forms**: A list of form templates. The 'order' template is currently selected and highlighted.
- Components for order**: A list of components available for the selected form. Each component has an edit icon (pencil) and a delete icon (X).

At the bottom left of the window, there is a help icon (question mark).

Use the *Form designer* dialog box to design and manage ELO forms used in the form-based workflow. Different content and buttons appear depending on the selected function. The basic functions are explained in the following.

Toolbar

The toolbar is located in the top part of the dialog box. The tools differ depending on the selected function.

Form: Select *Form* to create a new form. A form can contain multiple templates.

Template: Use the *Template* button to create a new template for a form. Templates are the building blocks for forms. A form can consist of multiple templates and/or tables.

Tab group: Use the *Tab group* button to create a new tab group. Forms can be split into different tabs in tab groups. This makes it easier to structure large forms.

Table: Use the *Table* button to create a new table. Tables are a special type of template. With table templates, you have the option to record data in table form and save it to the database using special map fields.

Refresh: Refresh the form data with the *Refresh* button. This is necessary, for example, if you have loaded an image that you want to use in the form.

Close: Close the form designer with this button.

Assignment: Selecting the *Assignment* button opens a submenu. In this submenu, you can assign forms to individual metadata forms. These forms are displayed instead of the metadata preview if you select the corresponding option. You can edit the metadata via the form. If a form has not been assigned, ELO uses a default form.

Forms

You can find a list with all existing forms in the *Forms* area.

Components for

You can find all existing components of the selected form in the *Components for* area. Components are templates, tables, tab groups, and user scripts.

You will find more information on the topic of *workflows* in the [ELO workflow](#) documentation.

Translation table

Available in: *Ribbon > Organize > System*

Use this function to open the *Translation table* dialog box. The dialog box lists all terms used in ELO in a table.

You can enter a translation for each term in the displayed languages. Click the corresponding line.

If you run the client in another language, metadata fields are displayed in the corresponding language that a translation was entered in the table for.


The basic settings provide columns for the system language (the language selected during the installation) as well as English (en) and French (fr).

You can add languages via the *context menu* (right-click in column 'undefined') > *Add language*. You can change the language via the *context menu* (right-click in column with language) > *Edit language*.

Move document files

Available in: *Ribbon > Organize > System*

Use the *Move document files* function to move files, file versions, attachments, and/or attachment versions to another medium (i. e. to a different document path). The repository structure remains the same.

 Move document files
×

Selection

Preselection in the repository: **Sales**

Select document paths


Source path All paths ▼

Target path basis ▼

Settings

From date to

Move referenced documents


OK
Cancel

Selection

Preselection in the repository: Indicates which folder was selected in the *Repository* work area.

Select document paths

Source path: Select the source path if you only want to move files from a specific path.

Target path: Define the target path. If the desired target path does not exist, it needs to be created in the ELO Administration Console.

Settings

From date: Enter the date on which you want to start moving files.

to: Enter the date on which you want to end moving files.

Move referenced documents as well: If this option is enabled, documents for which references exist in ELO are also moved to another path.

OK: To move the document files, select *OK*.

Delete expired documents

Available in: *Ribbon > Organize > System*

Use this function to delete entries whose retention period has passed.

Warning

The entries (folders or documents) are not deleted permanently. They are hidden and marked for deletion. This tells the administrator that the documents need to be removed from ELO permanently. To delete entries permanently, use the functions Show deleted entries and Delete permanently. They can be restored until the point at which they are permanently deleted.

Information

You define the retention period in the metadata on the *Options* tab. Your administrator can set a retention period in the ELO Administration Console (*Metadata forms and fields > Entry options > Lifetime*).

Documents only: If you select this option, only documents whose retention period has passed are marked for deletion.

Documents and folders: If you select this option, documents and folders whose retention period has passed are marked for deletion.

OK: After clicking the *OK* button, the deletion markers are set according to the selected options.

Delete permanently

Available in: *Ribbon > Organize > System*

Important

This function permanently deletes entries with a deletion marker from ELO. Permanently removed entries cannot be restored. You should be aware that even a differentiated backup concept only offers a limited option for restoring deleted entries.

In the *Delete permanently* dialog box, you can specify which entries with a deletion marker you want to permanently remove from ELO.

Remove deleted entries: All deleted documents and folders are removed from ELO.

Remove deleted document versions and versions of the attachment: All deleted document versions and deleted attachment versions are permanently removed from ELO.

Deletion date until: Enter a date here. All entries that were deleted before the specified date are permanently removed from ELO.

'Document' tab

Open in read-only mode

Keyboard shortcut: CTRL + O

Use this function to open a document selected in ELO in an external program.

Check out and edit

Keyboard shortcut: ALT + O

Use this function to check out a document or folder for editing. The checked out entries are transferred to the *In use* work area and locked for 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.

For more information, refer to the chapter Edit entry.

Related function

Check out to OneDrive: 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.

Edit document

Keyboard shortcut: CTRL + E

Use this function to open a document that is in the *In use* work area but is not currently open in the corresponding external application.

Save your changes in the external application and then transfer the document to ELO using the *Check in* function (available in: *Ribbon > Document*).

Open with

With this function, you select the program to view a file with. The file is not checked out.

Check in

Keyboard shortcut: ALT + I

Use this function to transfer the edited document back to ELO. The document is no longer locked.

For more information, refer to the chapter Edit entry.

Information

The function is only enabled if there is at least one document in the *In use* work area.

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.

Load new version

Available in: *Ribbon > Document > Versions*

You can also load a new version if you did not check out and edit the current version of a document filed to ELO.

The *Load new version* function enables you to load a file from your local file system and store it as a new version of a document in the *Repository* work area. Using this option on version-controlled documents creates a new entry in the version history and makes this new version the current working version. In the case of documents that are not version controlled, the previous version is overwritten.

The following options are available for loading a new version:

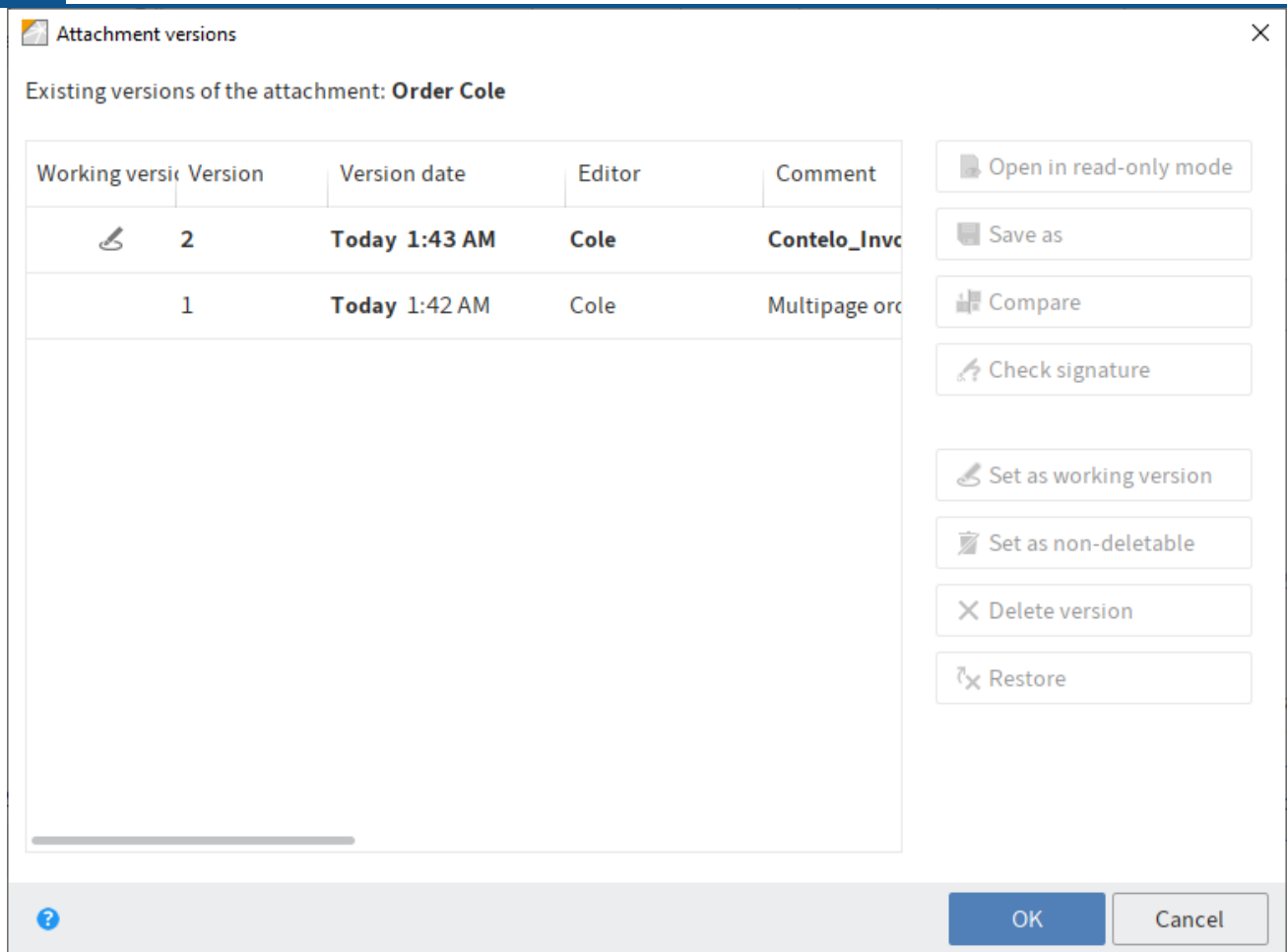
- *Load new version* function
- Drag-and-drop (left-click and hold the mouse to drag a new document to a document in ELO and release the mouse button)

Document versions

Available in: *Ribbon > Document > Versions*

Use this function to open an overview of the existing document versions for the selected entry. The current working version is displayed in bold type. The current working version is the version with the pen icon in the *Working version* column.

Among other things, you can open document versions in read-only mode, compare versions, set them as the working version, and delete them.



The following functions are available:

Open in read-only mode: Opens the selected version in an external application.

Save as: Use this function to save versions to your local file system.

Compare: Select two versions by holding down the CTRL key and select *Compare*. The versions are shown next to each other in a new window.

Check signature: Checks the signature of a selected version. The signature module must be installed.

Set as working version: This option sets the selected version as the working version. A working version is the currently used version.

Set as non-deletable: The selected version is set as non-deletable.

Delete version: Deletes the selected version. The version is initially assigned a deletion marker and can be restored (as long as it has not been permanently deleted).

Information

To view deleted versions, enable the *Show deleted entries* function (*Ribbon > Organize > Delete*).

Restore: Removes the deletion marker from a deleted version.

Edit comment: To edit the comment for a version, double-click the corresponding comment field.

Discard document changes

Available in: *Ribbon > Document > Versions*

Use this function to delete the current working version of a document and restore the original version.

This function is only available for documents that you have checked out.

Create signature

Available in: *Ribbon > Document > Verify*

Use this function to digitally sign documents.

Requirement: Suitable third-party software and hardware must be installed.

Check signature

Available in: *Ribbon > Document > Verify*

Use this function to check the digital signature of a document. The function is only available if the document has a digital signature.

Test checksum

Available in: *Ribbon > Document > Verify*

This function verifies the checksum of the selected document. The checksum indicates whether the document has been transferred correctly to ELO. This function creates a hash value of the document. This value is checked for changes to guarantee that the document has not been changed.

Compare documents

Available in: *Ribbon > Document > Verify*

Use this function to open two documents next to each other in a new window. This allows you to compare the two documents directly.

To use this function, select two documents in the *Content* tab of an ELO folder while holding down the CTRL key.

Create preview document

Available in: *Ribbon > Document > Convert*

Use this function to create a preview document in TIFF or PDF format for the currently selected document. The preview document is a special image document that is stored separately in ELO. Use this function to display documents if there is no viewer for the original format. You can use this for CAD files, for example.

Use the *Show preview document* option to view the preview document. You will find the *Show preview document* function under *Ribbon > View > Display*.

PDF conversion

Available in: *Ribbon > Document > Convert*

Requirement: An ELO PDF Printer must be installed.

Use this function to convert a document selected in ELO into a PDF document. The document is filed to the repository as a new version.

TIFF conversion

Available in: *Ribbon > Document > Convert*

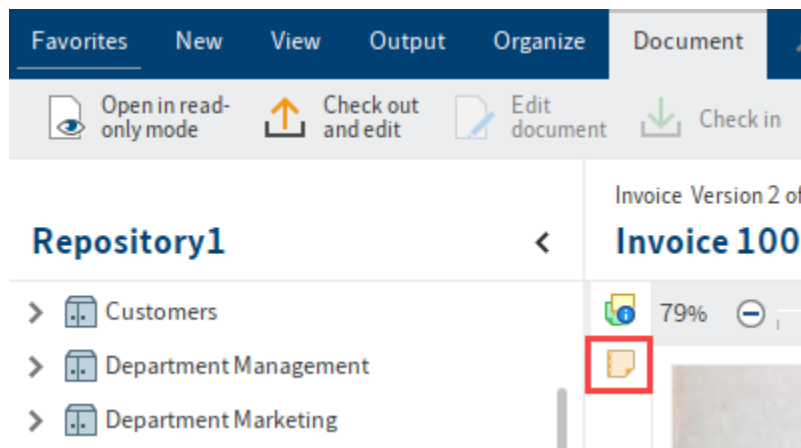
Requirement: An ELO TIFF Printer must be installed.

Use this function to convert a document selected in ELO into a TIFF document. The document is then filed as a new version of the original document.

General margin note

Available in: *Ribbon > Document > Margin note*

Use this function to create a general margin note for a document. A general margin note can be seen and edited by all users. The general margin note is yellow.



Margin notes are displayed on the split bar. If you hover over the margin note with the mouse pointer, the text, the creation date, and the editor are displayed.

You can use the margin note icon to open the margin note for editing (or for viewing in the case of a permanent margin note).

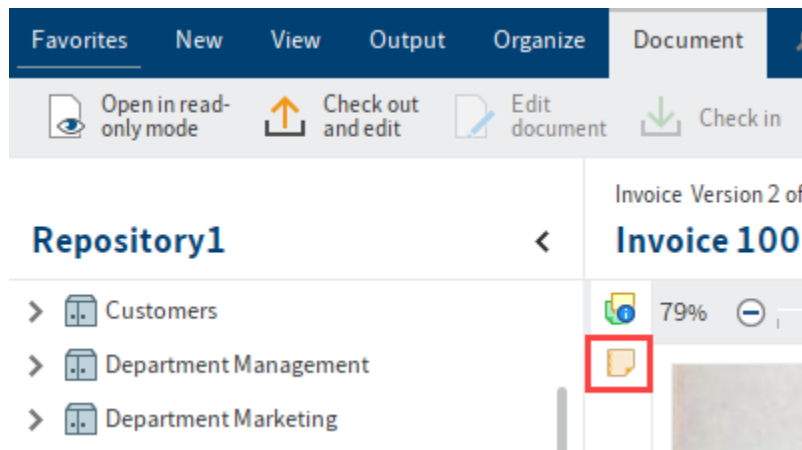
You can use the context menu to open e-mail addresses, ELO links, and web pages in a margin note (*Right-click > Open links*).

A margin note applies to the entire document, and not just the current version.

Personal margin note

Available in: *Ribbon > Document > Margin note*

Use this function to create a personal margin note for a document. Personal margin notes can only be viewed or edited by the creator of the margin note. Personal margin notes are green.



Margin notes are displayed on the split bar. If you hover over the margin note with the mouse pointer, the text, the creation date, and the editor are displayed.

The margin note icon opens the margin note for editing (or for viewing in the case of a permanent margin note).

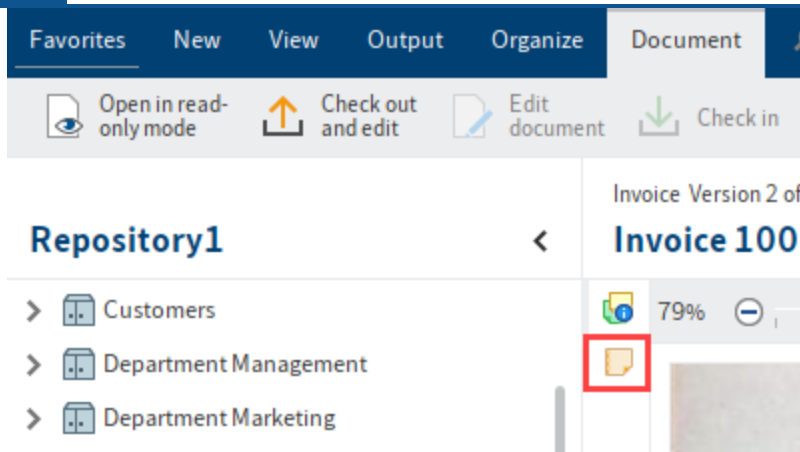
You can use the context menu to open e-mail addresses, ELO links, and web pages in a margin note (*Right-click > Open links*).

A margin note applies to the entire document, and not just the current version.

Permanent margin note

Available in: *Ribbon > Document > Margin note*

Use this function to create a permanent margin note for a document. A permanent margin note can be seen by all users. Unlike general and personal margin notes, permanent margin notes cannot be edited or deleted. The permanent margin note is red.



Margin notes are displayed on the split bar. If you hover over the margin note with the mouse pointer, the text, the creation date, and the editor are displayed.

You can use the margin note icon to pen the margin note for viewing.

You can use the context menu to open e-mail addresses, ELO links, and web pages in a margin note (*Right-click > Open links*).

A margin note applies to the entire document, and not just the current version.

Open attachment in read-only mode

Available in: *Ribbon > Document > Attachment*

Use this function to open an attachment in the corresponding external application, such as Microsoft Word.

Attachment versions

Available in: *Ribbon > Document > Attachment*

Use this function to open an overview of the attachment versions. You can open, store, compare, or delete individual attachments. In addition, you can check the signature of an attachment and restore a deleted attachment.

The following options are available:

Open in read-only mode: Opens the selected version in an external application.

Save as: With this function, you can store versions of the attachment selected in a list of versions outside of ELO.

Compare: To compare two versions, select two entries in the versions overview list and then select *Compare*.

Check signature: If you have signed attachment, you can check the signature with this function.

Set as working version: This option sets the selected version as the working version. A working version is the currently used version.

Set as non-deletable: The selected version is set as non-deletable.

Delete version: Delete a version selected in the list.

The version is highlighted in red after deletion.

Restore: Select *Restore* to restore a deleted version (marked red).

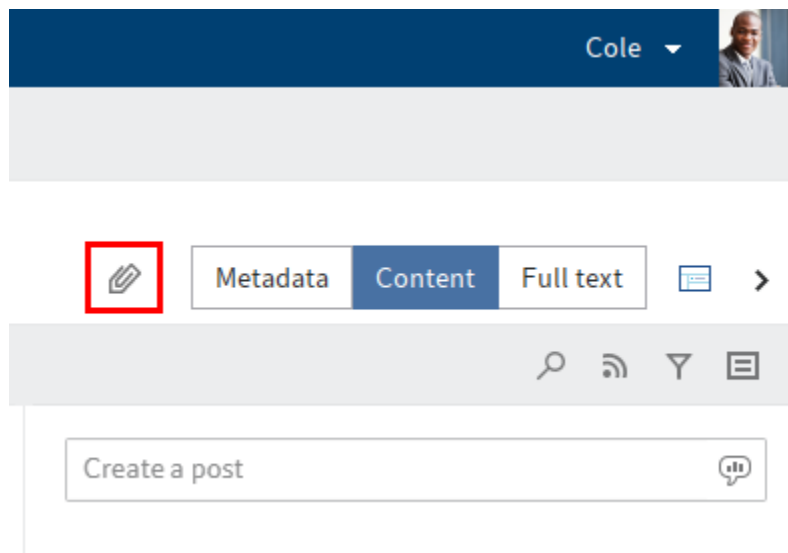
The version is restored to the list and is no longer highlighted.

OK: Select *OK* to save changes and close the dialog box.

Add attachment

Available in: *Ribbon > Document > Attachment*

This function enables you to transfer a file from your local file system and attach it to an ELO document. The local file is copied to ELO and linked to the document stored in ELO.



You will recognize an attachment by the paper clip icon of the *Open attachment* button.

To open the attachment, select the *Open attachment* button.

Information

If you add a second attachment to a document, you can only access the first attachment using the *Attachment versions* function.

Save attachment as

Available in: *Ribbon > Document > Attachment*

If a document has an attachment, you can use the *Save attachment as* function to save this attachment outside of ELO in your local file system or on an external storage medium.

Delete attachment

Available in: *Ribbon > Document > Attachment*

Delete an attachment with this function.

'Search' tab

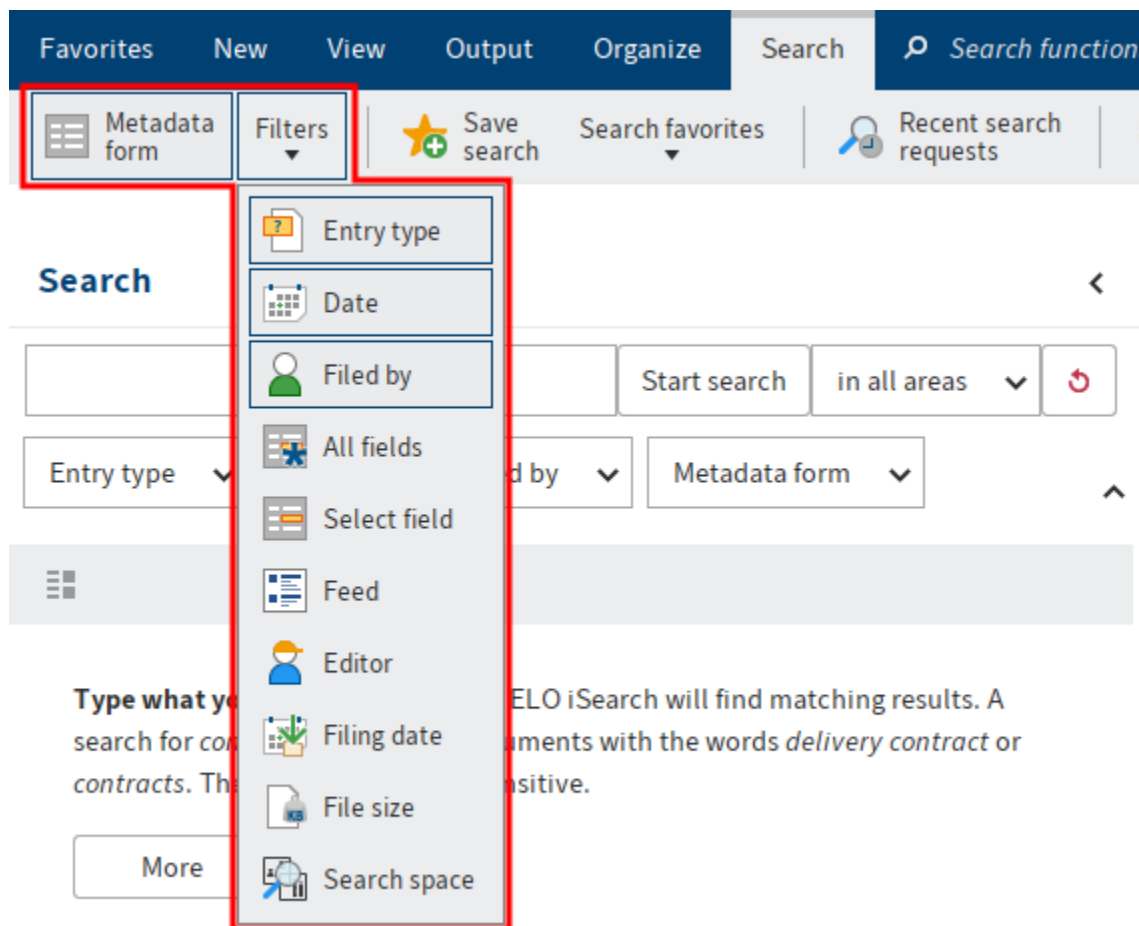
For general information about the search, refer to the chapter 'Search' work area.

The chapter Search entries explains how to run a search and view the search results.

Filters

ELO iSearch offers the option of adding filters. These filters can be used to refine the search.

You can access the filters under *Ribbon > Search*.



ELO iSearch provides the following filters:

- Metadata form: Filters the search by the selected metadata form.
- Entry type: Filters the search by the selected entry type (e.g. folder, image document, Word document).
- Date: Filters the search by the selected document date.
- Filed by: Filters the search by the user that filed the entries.
- All fields: Enables the user to search in all fields.
-

Select field: Enables the user to search a field in a metadata form. You can select multiple fields in a form by holding down the CTRL key.

- Feed: Enables the user to search posts and hashtags within the ELO feed.
- Editor: Filters the search by the user entered as the editor in the *Metadata* dialog box.
- Filing date: Filters the search by the selected filing date.
- File size: Filters the search by the selected file size.
- Search spaces: Enables you to run a search in a selected space.

Enable/disable filter

Click to enable or disable the filter. You will recognize an active filter based on the button's darker color. As soon as you have enabled a filter, the corresponding field appears below the search field.

The screenshot shows the search interface of the ELO Java Client. At the top, there is a navigation bar with tabs: Favorites, New, View, Output, Organize, Search, and Search functions. Below the navigation bar, there is a toolbar with icons for Metadata form, Filters, Save search, Search favorites, and Recent search requests. The main search area is titled "Search" and contains a search input field, a "Start search" button, a dropdown menu for "in all areas", and a refresh icon. Below the search input field, there are several filter dropdown menus: "Entry type", "Date", "Filed by", "Metadata form", and "Editor". The "Editor" dropdown menu is highlighted with a red box, indicating it is the active filter.

Click the arrow icon to the right of the field to open a drop-down menu for selecting options.

The selection options vary depending on the filter.

The selected setting appears in the filter field.

The filter becomes active when you start a search.

Alternative: Select *Reset search* to filter the search results for a search that has already run.

Combine filters

The screenshot shows the search interface with the following elements:

- Navigation tabs: Favorites, New, View, Output, Organize, Search, Search functions.
- Metadata form icon and Filters dropdown.
- Save search (star icon), Search favorites dropdown, Recent search requests (lock icon), and Search button.
- Search input field with "Start search" button, "in all areas" dropdown, and refresh icon.
- Active filters (highlighted with a red box):
 - Entry type: PDF (with close icon), Image (with close icon), and Date: 2023 (with close icon).
- Additional filters: Filed by dropdown, Metadata form dropdown, and "About 3 results" indicator.

You can combine filters.

- Multiple filters: By combining different filters, you can narrow down the search results based on multiple criteria. This allows you to create precise search requests.
- Multiple filters of one type: Use multiple filters of the same type to set more advanced filters. For example, multiple *Entry type* filters allow you to perform a search filtered by multiple entry types.

Negate filters

The screenshot shows the search interface with the following elements:

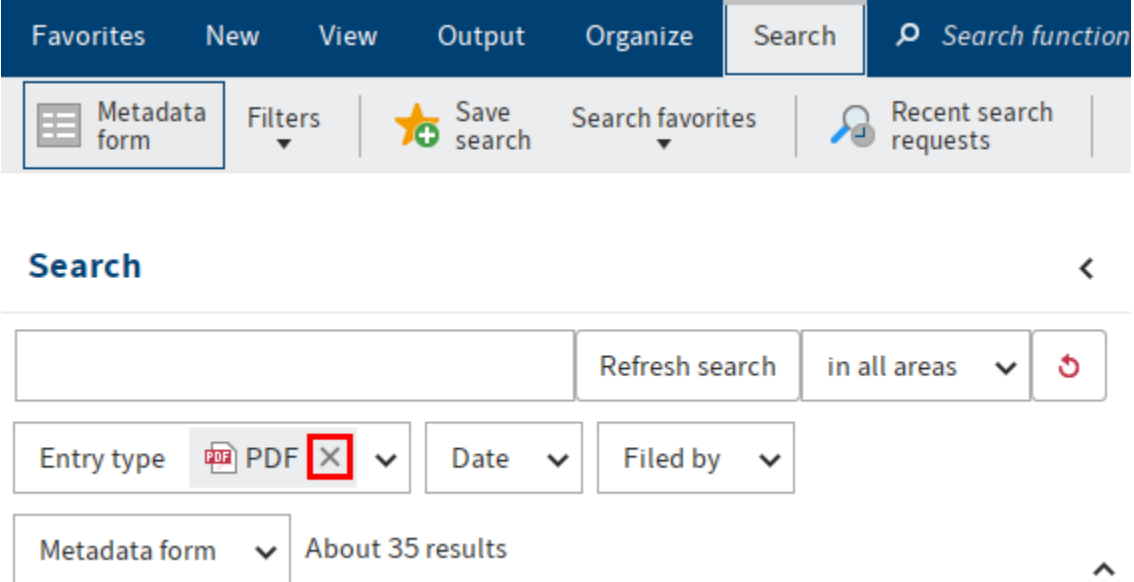
- Navigation tabs: Favorites, New, View, Output, Organize, Search, Search functions.
- Metadata form icon and Filters dropdown.
- Save search (star icon), Search favorites dropdown, Recent search requests (lock icon), and Search button.
- Search input field with "Start search" button, "in all areas" dropdown, and refresh icon.
- Filter dropdowns: Entry type, Date, Filed by, and Metadata form.
- A dropdown menu for the "Entry type" filter is open, showing:
 - does not contain
 - Hide filter

You can set filters to exclude specific values.

Right-click the filter field to open the context menu. In the context menu, enable the option *does not contain*.

The filter is now in *is not* mode.

Remove filters



The screenshot displays the search interface of the ELO Java Client. At the top, there is a navigation bar with tabs for Favorites, New, View, Output, Organize, Search, and Search function. Below this is a toolbar with buttons for Metadata form, Filters, Save search, Search favorites, and Recent search requests. The main search area is titled "Search" and contains a search input field, a "Refresh search" button, and a dropdown menu set to "in all areas". Below the search input, there are filter sections: "Entry type" with a "PDF" filter selected (highlighted with a red box and an 'X' icon), "Date", and "Filed by". At the bottom, a "Metadata form" dropdown is shown next to the text "About 35 results".

Use the X icon next to the selected filter value to remove it.

Filter with date

The screenshot shows the search interface with the 'Date' filter dropdown menu open. The menu is highlighted with a red border. The input field at the top of the menu contains the text 'Apply date with ENTER'. Below the input field, there are several options for filtering by date:

- Range
- Today
- Last 10 days
- Last 30 days
- Last 3 months
- Next 3 months

The calendar view shows the month of February 2024. The date '8' is highlighted in a red box. The calendar grid is as follows:

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
5	28	29	30	31	1	2	3
6	4	5	6	7	8	9	10
7	11	12	13	14	15	16	17
8	18	19	20	21	22	23	24
9	25	26	27	28	29	1	2
10	3	4	5	6	7	8	9

Use the *Date* and *Filing date* filters to filter your search by a specific date or period. Both filters apply the same principle.

This type of filter offers the following options:

Input field: To select a specific date, click the corresponding date in the calendar.

Alternative 1: Enter the date manually in the input field. The following pattern is recommended: MM/DD/YYYY.

Alternative 2: Enter the period manually in the input field. The following rules apply:

- Past: If you enter a minus sign and a number, the corresponding period in the past is selected.
-

Future: If you enter a plus sign and a number, the corresponding period in the future is selected.

- Months: If you add an *m* to the number value, the period is calculated in months instead of days.

Examples

For example, if you enter the value *-14*, the filter applies the setting *Last 14 days*.

In contrast, if you enter the value *-6m*, the *Last 6 months* setting is applied.

Range: Selecting *Range* opens two additional input fields (*from* and *to*). Use these fields to define a period of time. Manually enter the start and end date or select them using the calendar.

Today: Select *Today* to automatically select the current date.

Last 10 days: Selecting *Last 10 days* automatically sets the period to the last 10 days.

Last 30 days: Selecting *Last 30 days* automatically sets the period to the last 30 days.

Last 3 months: Selecting *Last 3 months* automatically sets the period to the last 3 months.

Show calendar (small calendar icon): Selecting *Show calendar* opens a calendar in the middle of the drop-down menu.

Show list of years (list icon): Selecting the *Show list of years* button opens a list of years in the middle of the drop-down menu. To select one or more years as a date range, enable the corresponding check boxes.

Filter: Numeric

The screenshot shows the ELO Java Client search interface. At the top, there is a navigation bar with tabs: Favorites, New, View, Output, Organize, Search, and Search functions. Below this is a secondary bar with: Metadata form, Filters, Search favorites, Recent search requests, Search logic, and Result. The main search area has a search input field, a 'Start search' button, a 'in all areas' dropdown, and a refresh icon. Below the search bar are several filter dropdowns: Entry type, Date, Filed by, and Metadata form. The 'Invoice amount' dropdown is expanded, showing a search input field with the placeholder 'Filter/Apply with ENTER' and two filter options: '<100000 (9)' and '>100000 (1)'. The dropdown is highlighted with a red border.

Metadata fields with the file type *Number* can be filtered by number values and number ranges.

Enter the desired number value or number range in the filter input field.

To enter a number range, you have the following options:

- <: To enter a number range less than a specific number, enter the less-than symbol (<) and the number.
- >: To enter a number range greater than a specific number, enter the greater-than symbol (>) and the number.
- ...: To enter a range between two numbers, separate these numbers with three periods (...).

Save search

You can also save searches as favorites. There are two ways to start a new search with a search favorite:

- From the *Search favorites* drop-down menu on the *Search* tab
- From the search favorite tile in *My ELO*

Search favorites are automatically saved in the *Search favorites* drop-down menu and as a tile. You can find the tile in the tile navigation of *My ELO* under *Hidden tiles*.

If you click a search favorite, the search term is applied to the search field. You can start a new search with the search favorite.

Manage search favorites

Available in: *Search work area > Ribbon > Search > Search favorites*

Use this function to rename or delete a search favorite.

Use the arrow icons to change the order of the favorites in the drop-down menu.

Select the *Delete* button to delete the selected favorite. The favorite is initially marked red. The favorite 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.

Recent search requests

ELO saves the ten most recent search requests. Click the search request to run the search again.

The search requests are saved when you close ELO.

The menu contains previous ELO iSearch requests and metadata search requests.

Search metadata

Available in: *Search work area > Ribbon > Search > Search logic*

Keyboard shortcut: CTRL + F

This function enables you to search the fields of metadata forms.

In addition to using the ELO iSearch, ELO enables you to search the metadata using metadata forms. The metadata search allows you to search for specific metadata.

Information

If you want to use a metadata form for the search, your administrator first has to enable the corresponding setting.

The following options are available in the *Search metadata* dialog box:

Form selection

All metadata forms that can be used as a search form are displayed in the *Available forms* area. Select the metadata form that you used to file the document you are searching for, e. g. *Invoice*. This limits the search to documents that have been assigned this metadata form.

Information

The *Filter* field enables the user to browse or filter the *Available forms* area.

Dashboards

In the *Search* work area, buttons are available that allow you to launch dashboards after conducting a search with a form filter. These buttons are only displayed if dashboards have been configured for the corresponding metadata form.

Navigation: Favorites | New | View | Output | Organize | Document | Search | Search functions

Tools: Metadata form | Filters | Save search | Search favorites | Recent search requests | Search logic | Result

Search

Outgoing (8607)

Search: * Refresh search in all areas

Filters: Entry type | Date | Filed by | Metadata form | Outgoing invoice X | Space

About 20 results

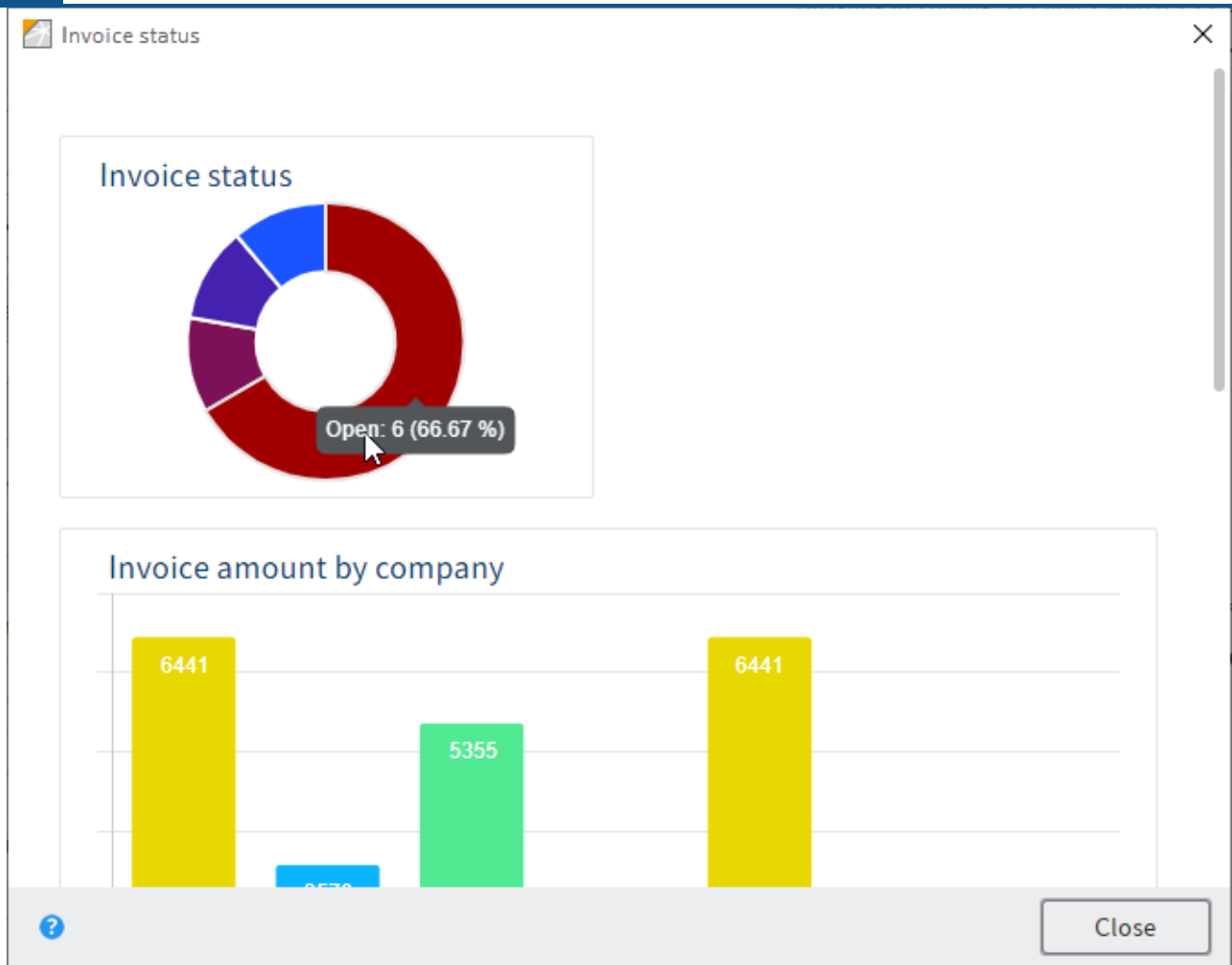
COMPANIES INVOICESTATUS

Type	Short name	Date	Hits
	(86078CE1-9A7E-5077-DE78-4093975AD21F)		
	Rechnung_Contelo_2021_10_12	Oct 12, 2021, 2:58 P...	
	(0C220213-FBBD-4E93-E789-3D07DCAEAE4D)	Dec 21, 2022, 9:35 A...	
	(E16D7F56-4A75-300C-9C6F-C708E41CFB7B)	Dec 6, 2022, 11:00 P...	

Garl Obs 790!

Dashboards are created by the administrator. They can only be created with generation 2 metadata.

The dashboards allow you to visualize metadata of entries filed with the same metadata form in different ways. You can use bar charts, line charts, and doughnut charts.



You can view details about dashboards by clicking on them.

Search fields

The search fields of the metadata form are shown on the corresponding tab. They correspond to the fields on a metadata form. The tabs and search fields that appear depend on the settings for the corresponding search form.

You can use the search fields to search specifically for the entries in these fields, such as for the *Invoice number* or the *Filing date*.

Information

When searching the metadata, it is possible to make entries to multiple fields of a search form. This allows you to create complex search queries.

For example, enter the status Unpaid in the *Status* field. ELO then searches exclusively in the *Status* input field of the documents that were filed with the *Invoice* metadata form.

Information

You can use keyword lists for entering search terms.

Options

The *Options* tab provides additional options to restrict the search to specific criteria.

Personal identifier: Use this field to search the contents of the *Personal identifier* field. Enter the term you entered in the metadata. If you want to search all entries with a personal identifier, enter * to the search field.

End of deletion period: These two fields enable you to restrict the search to entries with a specific deletion period.

End of retention period: These two fields enable you to restrict the search to entries with a specific retention period.

Entry type: This enables you to restrict the search to specific entry types (e. g. folders, PDF, Word document).

Notes: Allows users to search for notes. Select the note type from the drop-down menu.

Search range: The options in the *Search range* define what is to be searched.

Search mode: The search mode is important when you use multiple fields for the search. Use the *Search mode* drop-down menu to specify whether the fields are linked with Boolean AND or with Boolean OR.

- AND: Only matches meeting all criteria are returned.
- OR: All matches meeting at least one of the criteria are returned.

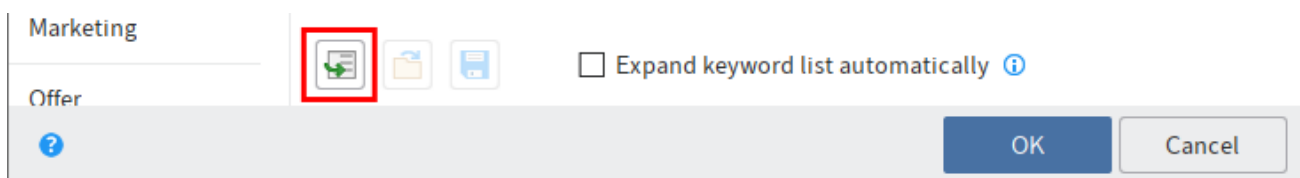
Filed by: Allows users to restrict the search to entries by specific users.

File name: Allows users to restrict the search to entries with a specific file name.

Start search

Select the *OK* button when you have completed the search form.

Previous searches



The screenshot shows a search interface with two tabs: 'Marketing' and 'Offer'. The 'Marketing' tab is active. Below the tabs is a search field containing the text 'Marketing'. To the right of the search field are three icons: a folder icon, a document icon, and a document icon with a magnifying glass. A red box highlights the folder icon. To the right of the icons is a checkbox labeled 'Expand keyword list automatically' with an information icon. At the bottom right are two buttons: 'OK' and 'Cancel'. A question mark icon is visible in the bottom left corner of the interface.

If you have already carried out multiple search requests, selecting *Enter metadata using the most recently saved/displayed entries [F3]* (icon with green arrow) will open a list of previous search requests. Both the search term and the field used are displayed.

Select one of the listed entries followed by *OK*. The terms will then be transferred to the search form.

AND/OR search in fields

Content type	<input type="text"/>
Target group	<input type="text"/>
Product	<input type="text" value='"ELOprofessional" OR "ELOenterprise"'/>
Topic	<input type="text"/>

To search fields using AND/OR links, the search terms must be placed in quotation marks. One of the operators (AND or OR) must be placed between the search terms.

Current folder only

Available in: *Search work area > Ribbon > Search > Search logic*

Use this function to restrict the search to the folder selected last in the *Repository* work area. You need to select *Start search* again for the restrictions for a previously performed search to take effect. If you select the *Current folder only* option, the searched folder is displayed in a tooltip.

Please note

If the *Current folder only* option is enabled, the search can take a lot longer.

Show deleted entries

Available in: *Search work area > Ribbon > Search > Search logic*

To search exclusively for deleted entries, enable the function *Show deleted entries*. If the *Show deleted entries* option is enabled (highlighted yellow), you will ONLY see deleted entries in the search results.

Dynamic folder

Available in: *Search work area > Ribbon > Search > Result*

You can save a previous search request as a dynamic folder in the *Repository* work area. Only entries that match the search criteria are displayed in a dynamic folder. If a new document is filed to ELO that matches the search criteria, the new document is automatically displayed in the

dynamic folder. For example, you can display all invoices with the status Unpaid in a dynamic folder.

Dynamic folders are saved in the *Repository* work area. You can save them to any location here.

Remove from search results

Available in: *Search work area > Ribbon > Search > Result*

Use this function to remove individual entries from the list of search results. The entries remain unchanged in ELO. If you perform the same search again, then all matches will be displayed.

'Task' tab

Refresh

This function refreshes the task list. New tasks are denoted with a green dot.

Show workflow

In this dialog box, you can view and edit existing workflow tasks.

Click a workflow node in the workflow diagram to get more information on the node settings.

You will find more information in the chapter Workflow designer.

Forward workflow

Use this function to forward the selected workflow to the next workflow node. This ends your own workflow task and sends it to the next user.

You can also forward a workflow by double-clicking the entry in the task list.

You will find more information in the chapter Forward workflow.

Accept workflow

Use this function to accept a workflow node that was assigned to a group. The workflow is no longer displayed in the *Tasks* work areas of the other group members. This prevents the workflow from being processed by multiple users at once.

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

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

Return workflow

Available in: *Tasks work area > Ribbon > Task > Edit*

Use this function to return a workflow node to the group that was originally assigned the node. The group is displayed again in the workflow node.

Delegate workflow

Available in: *Tasks work area > Ribbon > Task > Edit*

Use this function to delegate a workflow node to another user. The user is displayed in an additional node in the workflow. Use the *Delegate workflow* dialog box to specify whether you want to be notified after completing the workflow task.

Information

Whereas in the *Hand off workflow* function, another user is assigned the workflow node, the *Delegate workflow* function creates an additional node for the user. The original assignment remains unchanged.

Delegate workflow

Select the user that you want to delegate the workflow to.

Recipient

Notify after processing the node

Name

Note

GRP_POST

Members of the group

Cole

OK Cancel

Recipient

Search for the desired user or group in the *Add user/group* field. Suggestions will appear as you type.

Click the corresponding suggestion to select a user or a group.

Alternative: If you click the triangle to the right of the *Select user/group* field, this will open a drop-down menu. This menu contains a list of the users and groups you selected recently.

Members of the group

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

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

Clear selection

To cancel the selection, click the X icon next to the selected user or group.

Notify after processing the node: If this check box is selected, you will receive a notification after the node is processed.

Name

Change the name of the task if required.

Comments

Write a note or a job instruction for the user you are delegating the workflow node to.

Postpone workflow

Available in: *Tasks work area > Ribbon > Task > Edit*

Use the *Postpone workflow* function to suspend processing of a workflow. You can specify a date until which a workflow will be hidden in the *Tasks work area*. Once the date has been reached, the workflow appears in the list again. In the *Postponement date* column, you can sort postponed workflows in the task list in the *Tasks work area*.

You can create a task view that gives you an overview of your postponed workflows. You will find more information in this chapter: *Create tile*.

Use the *Cancel postponement* function to cancel a workflow postponement. In the *Postponement date* column, you can sort postponed workflows in the task list in the *Tasks work area*.

Cancel postponement

Available in: *Tasks work area > Ribbon > Task > Edit*

Use this function to cancel postponement of a workflow. If a workflow has been postponed, it remains active but is hidden in the *Tasks work area*.

Add a new task view to show the hidden workflows. For example, you can configure the view to only show postponed workflows. Switch to the *Tasks work area > View* tab. Select *New view*. Create a new view in the dialog box, enter the name *Postponed workflows* and enable the *Show postponed workflows* option.

To cancel a postponement, select the corresponding workflow and select *Cancel postponement*.

Information

If the *Postponement date* column is not displayed, there are two ways to show the column: Right-click the row with the table heading and select the check box in the drop-down menu before the *Postponement date* column name.

Alternative: In the gray toolbar, click *Display options > Table > Restore table columns*. The default table settings are restored. The *Postponement date* column is shown again.

Extend workflow deadline

Available in: *Tasks work area > Ribbon > Task > Edit*

Use this function to extend the deadline of a workflow. The function can only be used with workflows that have passed a deadline.

Specify how many days, hours, and minutes you want to extend the deadline by.

The new deadline is displayed in the *New deadline* column.

The responsible user is displayed in the *Responsible* column.

Please note

This function does not apply to individual nodes but to the maximum duration that is specified at the start node.

Edit reminder

Available in: *Tasks work area > Ribbon > Task > Edit*

Use this function to edit an existing reminder. You can view and edit the current settings.

There are two ways to delete a reminder:

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

You can learn how to create reminders in the chapter *Reminder*.

Hand off workflow

Available in: *Tasks work area > Ribbon > Task > Edit*

Use this function to transfer an active workflow node to another user. The user is displayed in the node and the workflow appears in the user's *Tasks work area*. The new user is entered in place of the original user.

Unlike the Delegate workflow function, you hand off the workflow step entirely and are no longer notified of the progress of the workflow.

Mark as unread

Available in: *Tasks work area > Ribbon > Task > Edit*

This function enables you to mark a task as unread. The task is denoted with a green dot.

Group tasks

Available in: *Tasks work area > Ribbon > Task > Display*

Use this function to add the group tasks to the list in the *Tasks* work area. Group tasks are tasks that were assigned to multiple persons, e. g. a department. To display group tasks in your task list, you need to be a member of the corresponding group.

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

Substitution tasks

Available in: *Tasks work area > Ribbon > Task > Display*

Enable this option to view substitution tasks in the *Tasks* work area. Substitution tasks are tasks of another user for which you are set as the substitute. This can be the case if you are covering for someone on vacation.

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

You will find more information on the topic of substitution here:

- Assign substitute
- Accept substitution
- View substituted user's Intray

Escalations

Available in: *Tasks work area > Ribbon > Task > Display*

Use this function to display tasks with overdue deadlines and those for which you are entered as the responsible user in the *Escalation management* dialog box. The *Show workflow* function allows you to check at what point the task was escalated.

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

If a task is escalated, a red icon with a white exclamation mark is displayed in the *Priority* column of the task list.

'File' tab

Refresh

Keyboard shortcut: F5 key

This function refreshes the view.

Scan pages

Use this function to scan individual pages. The individual pages are filed to the *Intray* work area as separate documents.

For more information on how to scan and store a document in the Intray, refer to the chapter Insert document.

Scan document

Use this function to scan multiple pages and merge into one document. The scanned document will be displayed in the *Intray* work area. At least one scanner must be installed for this function to work.

For more information on how to scan and store a document in the Intray, refer to the chapter Insert document.

Select scan profile (drop-down menu)

Available in: *Ribbon > File > Scan*

Use the drop-down menu to select a scan profile for the next scan. Create new scan profiles with the *Scan profiles* function.

Scan profiles

Available in: *Ribbon > File > Scan*

Use this function to open the *Scan profiles* dialog box. In it, you can define profiles for scanning documents. A scan profile enables you to define settings, such as which resolution to use or which format to store the scanned documents in. This way, you can set up a custom scan profile for each source document.

For more information on the settings, refer to the 'New' tab chapter.

Select scanner

Available in: *Ribbon > File > Scan*

Use this function to choose the scanner that you want to use. This function only applies when you use multiple scanners.

Join pages

Use this function to join multiple TIFF or PDF files into a multi-page file in the *Intray* work area.

Information

Annotations on the files are applied to the resulting document.

Method

1. Hold down the CTRL key and select each document in the *Intray* in turn.

The topmost selected document will be the first page of the new document.

2. Select *Join pages*.

Keyboard shortcut: CTRL + K

Result

The individual pages are merged into one document.

Outlook

Use the Split pages function to separate a multi-page document into individual pages.

Split pages

Keyboard shortcut: CTRL + T

Use this function to split the pages of a multi-page document in the *Intray* work area. The pages are numbered as individual documents in the *Intray* work area. The original is removed. The function is only available for multi-page TIFF and PDF documents.

Join (separator pages)

Available in: *Intray* > *Ribbon* > *File* > *Join*

Information

This function is only available for TIFF and PDF files.

Information

Annotations on the files are applied to the resulting document.

You need this function for scanning documents with multiple pages. To select the start and end of a document, add separator pages to the stack during scanning.

Use empty pages or pages with a black bar as separator pages. You can print the separator pages via *File > Scan > Scan profiles*.

If the *Join (separator pages)* function is enabled, the separator pages are automatically recognized and the documents are merged into multi-page documents.

Choose from two different merge options for separator pages:

- Join using black bar separator pages
- Join using blank pages as separator page

You will find the settings for the merge options on the *Ribbon > User menu [your name] > Configuration > Advanced settings > Separator page recognition*.

Metadata

Keyboard shortcut: F4 key

The *Metadata* dialog box is where you enter standardized information about a document, making it easier to find in the search.

For detailed information, refer to the chapter *Metadata*.

Edit document

Keyboard shortcut: CTRL + E

This function opens the selected document for editing in an external program.

Save your changes in the external program. The changes are applied to the document in the Inray.

Delete metadata

Available in: *Inray > Ribbon > File > Edit*

Use this function to delete the metadata of a document in the *Inray* work area. Once a document has been filed to ELO, you can edit the metadata but not delete it.

Barcode recognition

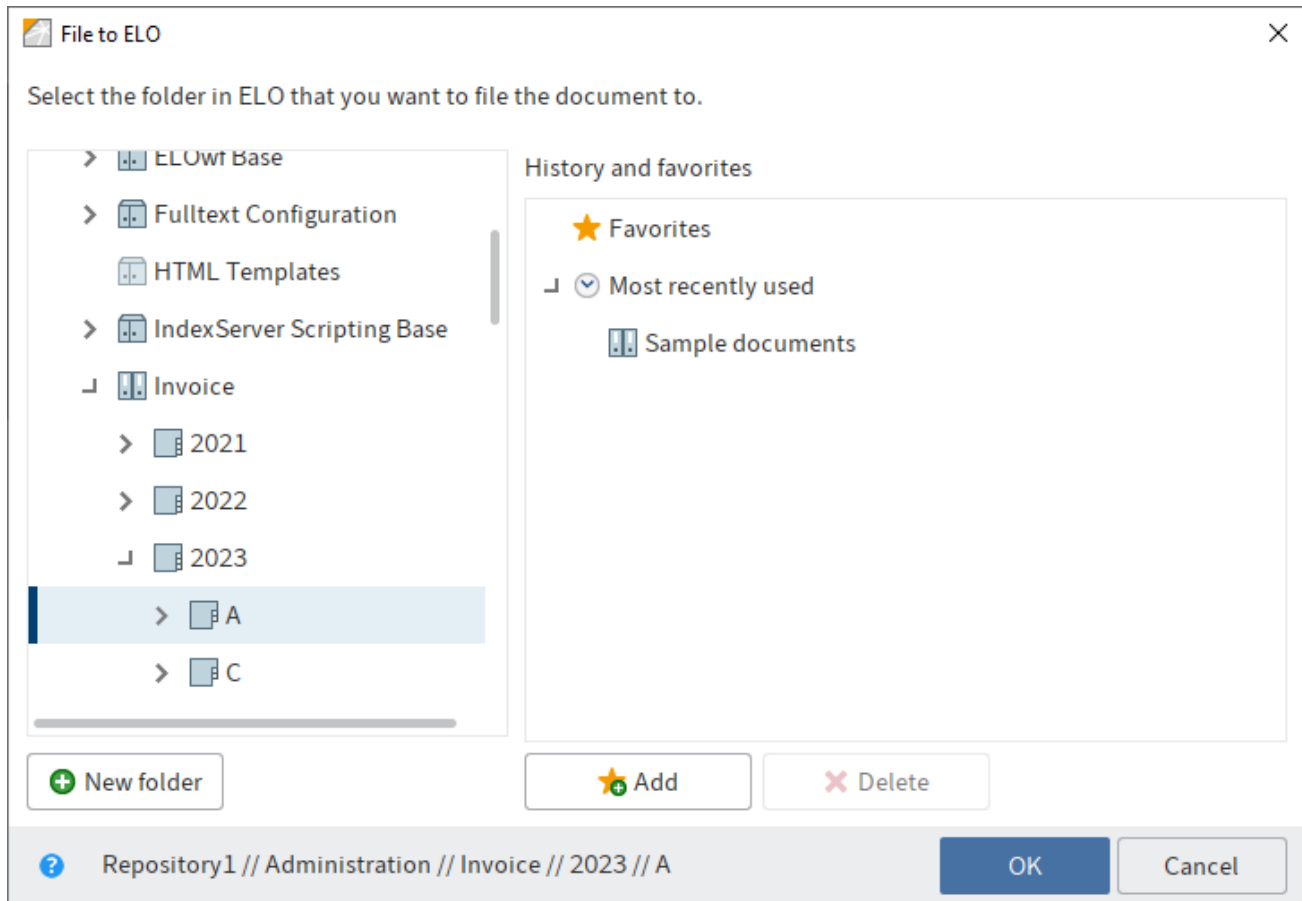
Available in: *Inray > Ribbon > File > Edit*

This function starts the automatic barcode recognition process. To use this function, you need the ELO Barcode module. ELO Barcode allows you to read barcode information in image files, such as scanned invoices.

For more information, refer to the [ELO Barcode](#) documentation.

File to ELO

Use this function to file a document from the *Intray* work area to ELO. Choose the desired filing location in the dialog box. Use the *Go to* function to show the filing location in ELO.



The following functions are available:

New folder: Use this function to create a new folder at the location selected in ELO.

Add: Use this function to create a new favorite. The favorites are listed under your *Favorites* and enable you to quickly select a filing location.

Delete: Removes a previously selected favorite.

Automatic filing

Available in: *Intray* > *Ribbon* > *File* > *Filing*

Use this function to automatically file a document to ELO. You do not have to select the filing target manually. To use this function, the document must have been assigned a metadata form that contains a filing definition.

Information

You cannot edit metadata forms in the ELO Java Client. You need to do this in the ELO Administration Console. Contact your administrator if necessary.

Serial filing

Available in: *Intray > Ribbon > File > Filing*

This function enables you to file multiple documents with the same metadata to ELO.

Requirements

There are several documents without metadata in your Intray.

Method

1. Open the *Intray* work area.
2. Select multiple documents by holding down the SHIFT key.
3. On the ribbon, select *File > Filing > Serial filing*.

The screenshot shows the 'Metadata for new document' dialog box. On the left, there is a sidebar titled 'Available forms' with a search filter and a list of form types including Barcode recognition, Basic Entry, Claims, Contract, Contract structure, Damage report, Document, Documentation, E-mail, ELO Business Solution Configura, ELOScripts, Form, and HR documents. The main area has four tabs: Basic, Extra text, Options, and Permissions. The 'Basic' tab is selected and contains the following fields:

- Short name: A dropdown menu showing '#.#'.
- Date: A dropdown menu showing '#D#'.
- Filing date: A dropdown menu.
- Current version: A text input field.
- Editor: A dropdown menu showing 'Administrator'.

At the bottom of the main area, there is a checkbox labeled 'Expand keyword list automatically' and an information icon. At the bottom right of the dialog, there are 'OK' and 'Cancel' buttons.

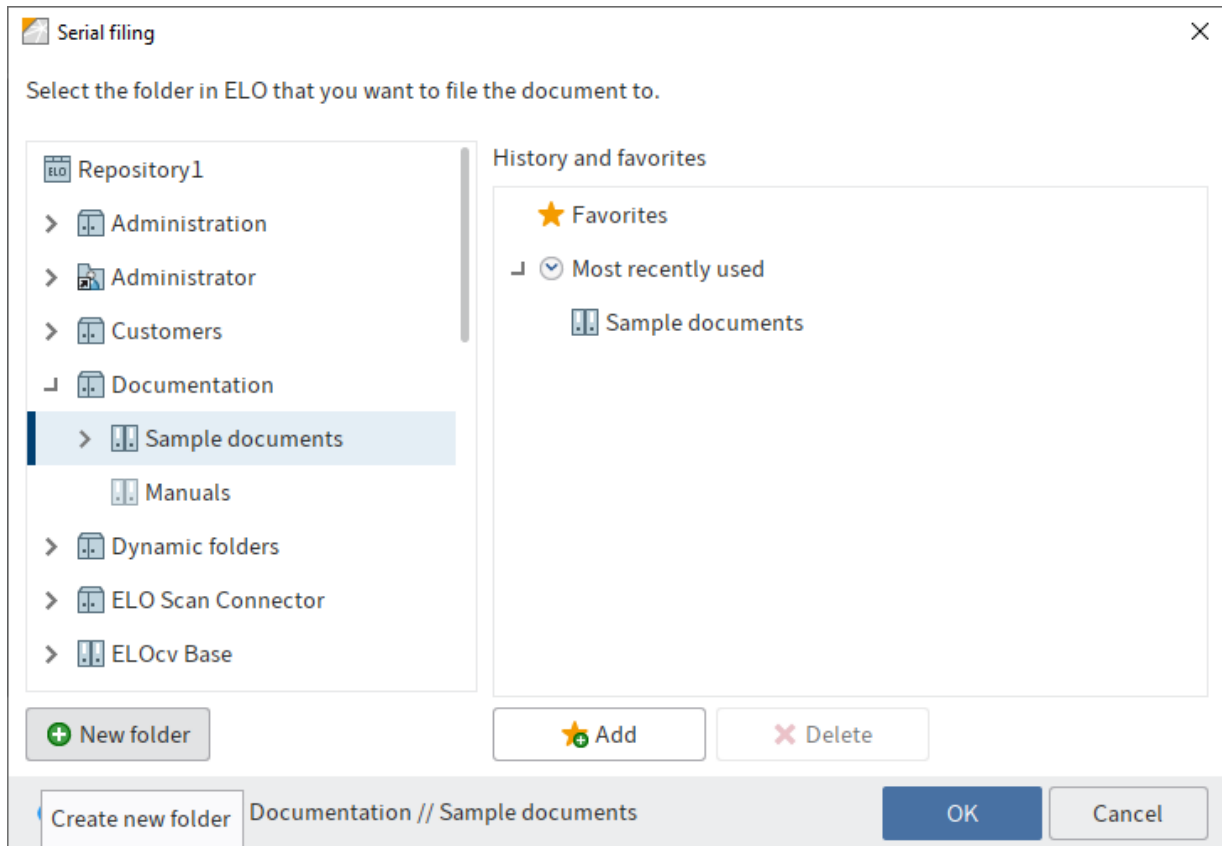
The *Metadata for new document* dialog box opens.

4. Define the settings for serial filing. For example, you can use variables to assign a consecutive number (##) during filing.

Information

You can find the possible variables in the tooltip below the short name or in the Wildcards section.

1. Select *OK*.



The *Serial filing* dialog box appears.

2. Choose the folder in ELO that you want to file the documents to.

The following functions are available:

New folder: Use this function to create a new folder at the location selected in ELO.

Add: Use this function to create a new favorite. The favorites are listed under your *Favorites* and enable you to quickly select a filing location.

Delete: Removes a previously selected favorite.

3. Select *OK*.

Result

The documents are filed to ELO.

Wildcards

With serial filing, you can use the following wildcards in the short name and other fields.

Wildcard	Function	Event example
#.#	The file name is inserted.	Invoice ELO Count result Grenkeleasing
#F#	The file name is inserted with the file extension.	Invoice ELO.tif Count result.pdf Grenkeleasing.doc
#E#	The file extension is inserted.	tif pdf doc
#D#	The file date and the time are inserted.	2012-07-11 15:28 2020-06-26 11:31 2019-12-02 18:03
## or #1#	The document are numbered, starting with 1.	1 2 3
#001#	The document are numbered with three digits, starting with 001.	001 002 003
Image #1# #E#	The placeholders can be combined with any text and with each other.	Image 1 png Image 2 jpg Image 3 gif

New version

Available in: *Intray > Ribbon > File > Filing*

Use this function to create a new version of a document from the *Intray* work area in the *Repository* work area.

Information

You cannot create a new version for a locked or deleted document.

Attach pages

Available in: *Intray > Ribbon > File > Filing*

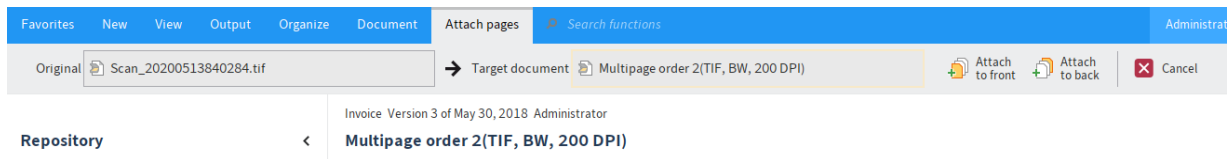
Information

Alternatively, the same function is also available when you drag a TIFF or PDF file to the repository and drop it on another TIFF or PDF document.

Use this function to add a TIFF or PDF document selected in the *Intray* work area to a document in the *Repository* work area.

Method

1. Select a TIFF or PDF document in the *Intray* work area.
1. Select *File > Filing > Attach pages*.



The *Attach pages* clipboard opens.

2. Select the TIFF or PDF document in the *Repository* work area that you want to attach the pages to.
3. To attach the original document at the beginning of the target document, select *Attach to front*. To attach the original document at the end of the target document, select *Attach to back*.

Result

The pages are added.

Send to another Intray

Available in: *Intray > Ribbon > File > Transfer*

This function enables you to send a document to one or multiple users. You can select whether to keep a copy of the document in your Intray after sending.

View substituted user's Intray

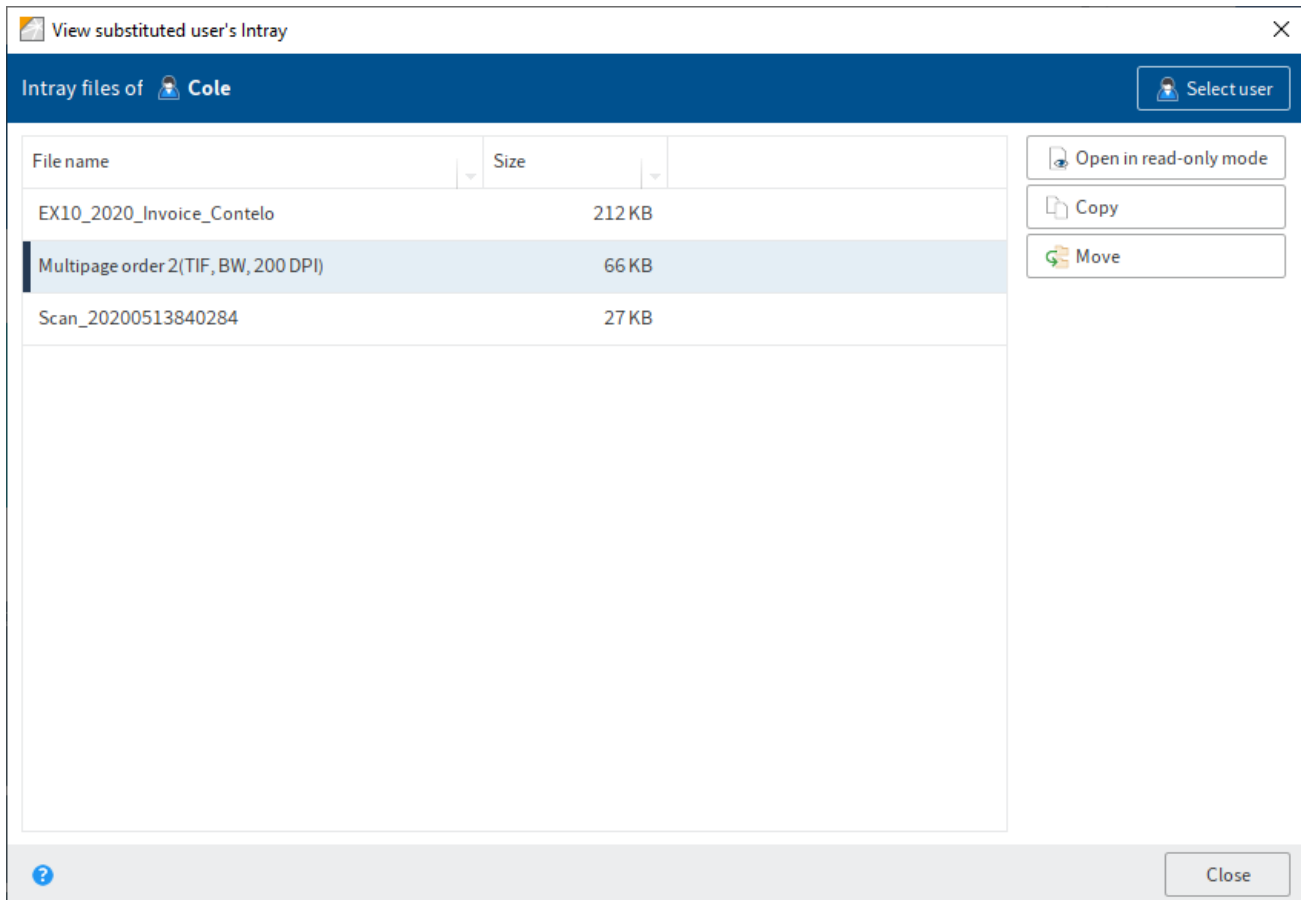
Available in: *Intray > Ribbon > File > Transfer*

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 off. If necessary, contact your system administrator.



Intrad files of: You can see whose Intrad you are currently viewing in the *Intrad files of* area.

Select user: Select the user whose Intrad you want to access using the *Select user* button.

Open in read-only mode: Use the *Open in read-only mode* button to open the respective document.

Copy: Select the *Copy* button to create a copy of the selected document in your own Intrad. The original document remains in the Intrad of the user you are substituting for.

Move: Select *Move* to retrieve the selected document and move it to your own Intrad. The document is removed from the Intrad of the user you are substituting for.

Information

You can make multiple selections when copying or moving documents by holding down the CTRL key.

You will find more information on the topic of substitution in these chapters:

- Accept substitution

-

Show substitution tasks

- Assign substitute

Delete

Use this function to permanently delete the selected document from the Intray.