



ELO Java Client

Personalization



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Personalization

Create tiles

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

☐ Show postponed workflows ⓘ

? OK Cancel

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:

- **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 Program interface > Tasks chapter.

Edit and delete tiles

Use the *Edit view* function to edit the settings of a folder, task, or search view.

The *Delete view* function enables you to delete the selected folder view or task view.

Alternatively, you can use the *Manage views* function.

These functions can be accessed via *Ribbon > View > Views*.

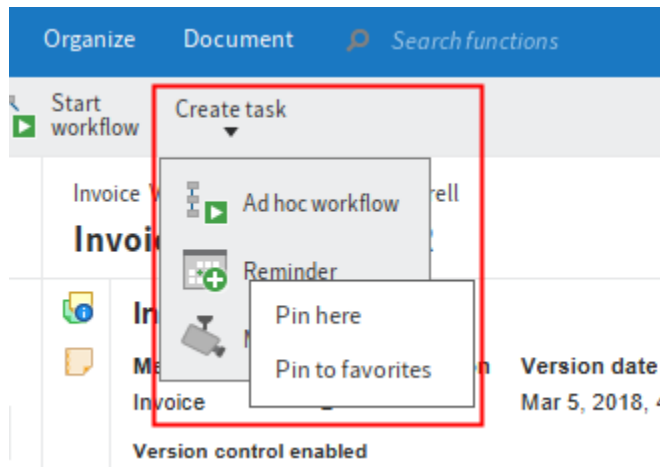
Customize the ribbon

There are different ways that you can personalize the ribbon.

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.

Method



1. Right-click the desired function.

The context menu opens.

2. In the context menu, click *Pin here*.

Result

The function now appears on the ribbon.

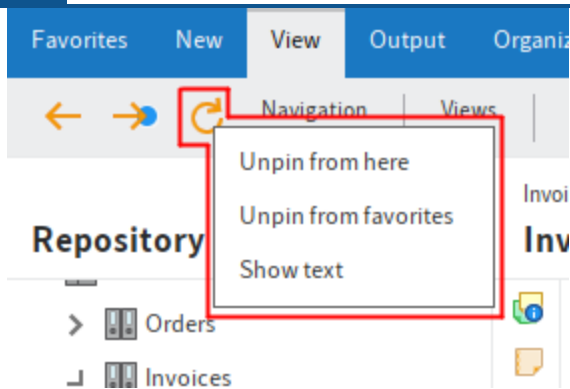
Outlook

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.

Method



1. Right-click the desired function.

The context menu opens.

2. In the context menu, click *Show text*.

Result

The name of the function now appears on the ribbon.

Outlook

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

Add/remove favorites

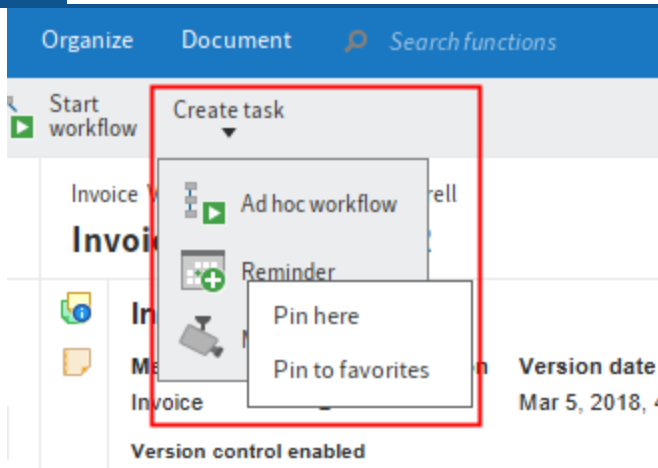
With the default settings, the *Favorites* tab contains several important functions that you can access quickly. You have the following options for adding functions to the *Favorites* tab:

- 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.

Method



1. Right-click the desired function.

The context menu opens.

2. Select *Pin to favorites* in the context menu.

Result

The function now appears on the *Favorites* tab.

Outlook

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

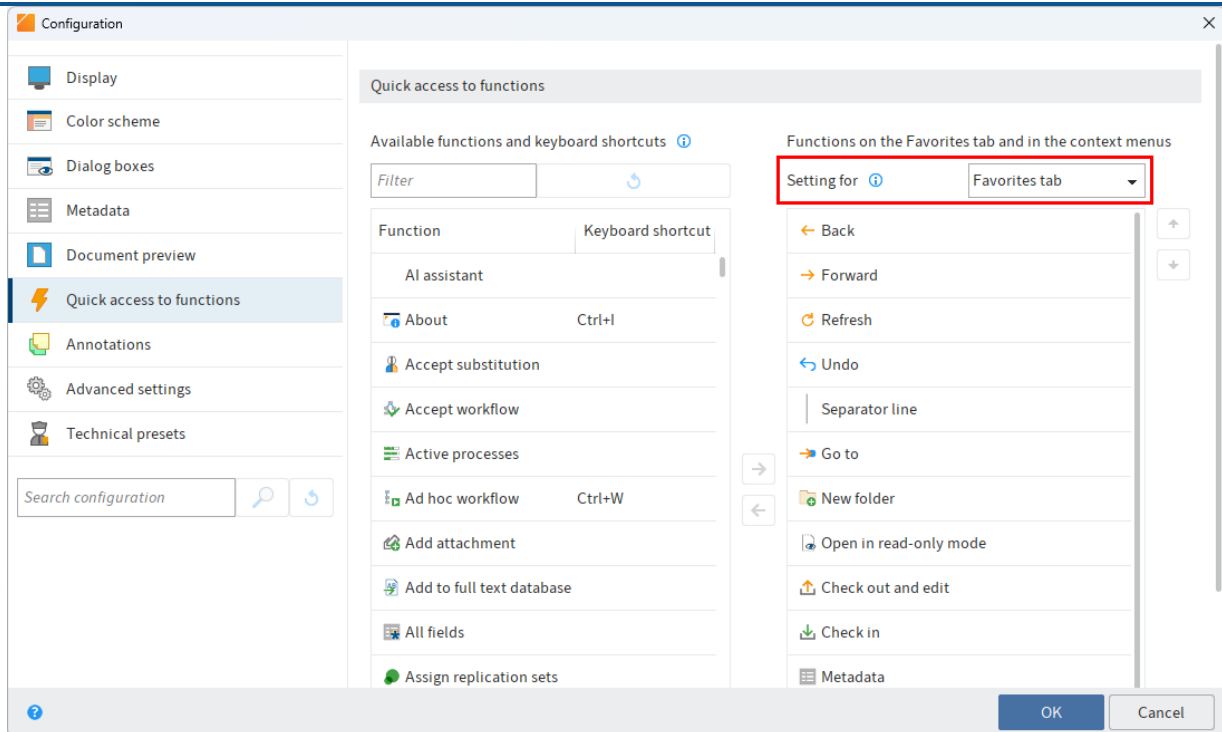
In the *Quick access to functions* area in the configuration, you can add functions to or remove functions from the *Favorites* tab, and change their location.

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.

Method

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.

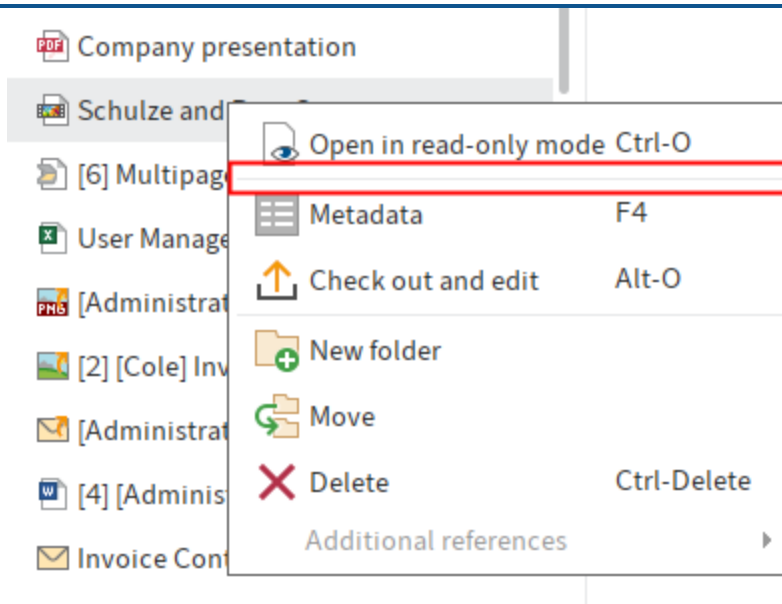
2. To add a function to the *Favorites* tab, select the function in the left-hand column and select the arrow pointing right between the two columns.

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.

Optional: 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.



3. Select *OK*.

Result

The selected functions are either displayed or removed from the *Favorites* tab and the context menu.

Customize settings

Configuration

This dialog box is where you make 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

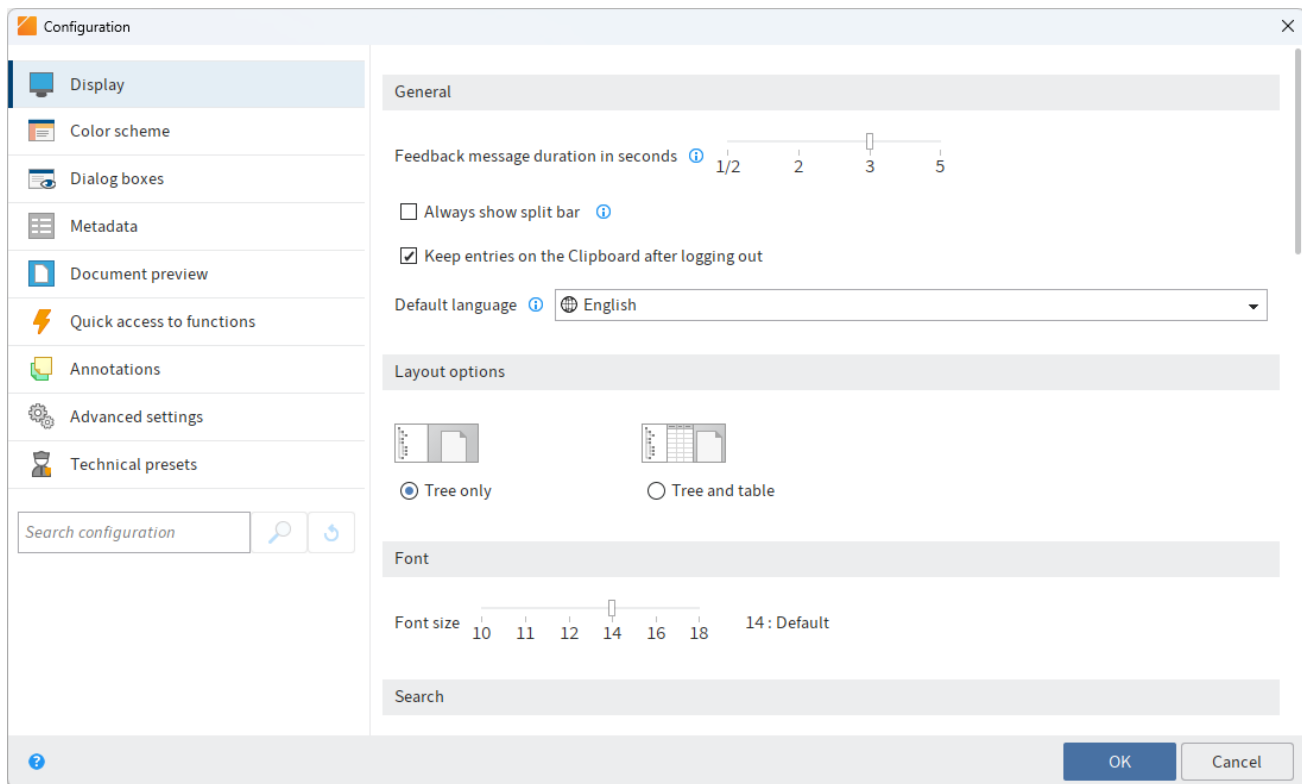
Search configuration

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 out: 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.

Start search

in all areas ▼

↺

Filed by ▼

Metadata form ▼

^

Filter/Apply with ENTER

☐	Cole	(2)
☐	Administrator	(45)
☐	Anderson	(72)
☐	Byte	(2)
☐	ELO Service	(11)
☐	Farrell	(2)
☐	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_Conf**

invoices Start search in all areas ↕

Entry type ▾ Date ▾ Filed by ▾ Metadata form ▾

Type ▾ Short name

EX10_2020_Invoice_Conf

EXTEN Invoice

EXTEN Invoice

EXTEN Invoice

Repository

EXTEN Invoices

EXTEN Invoices

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

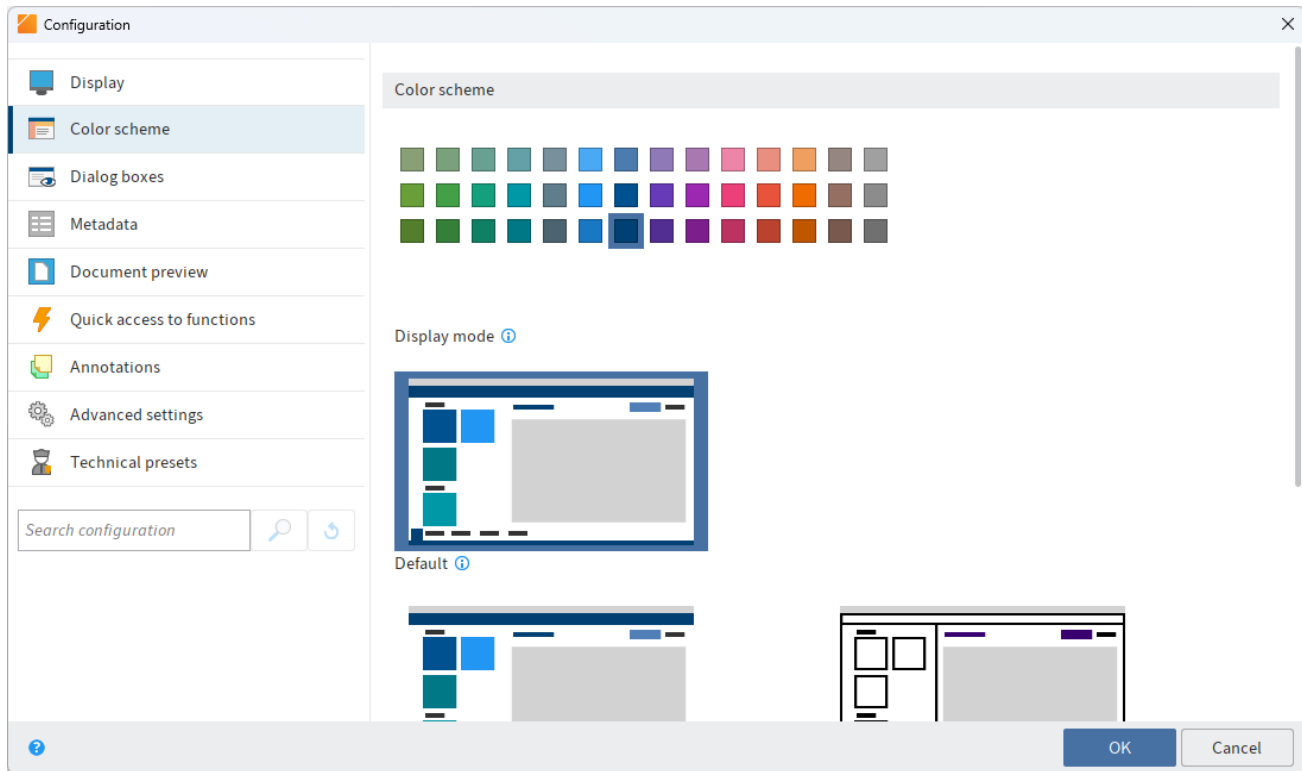
Maximum number of documents in the "Most recently used" list: Use this option to define the maximum number of recently used entries that are shown. You will find the overview of recently used entries in the *My ELO* work area.

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.

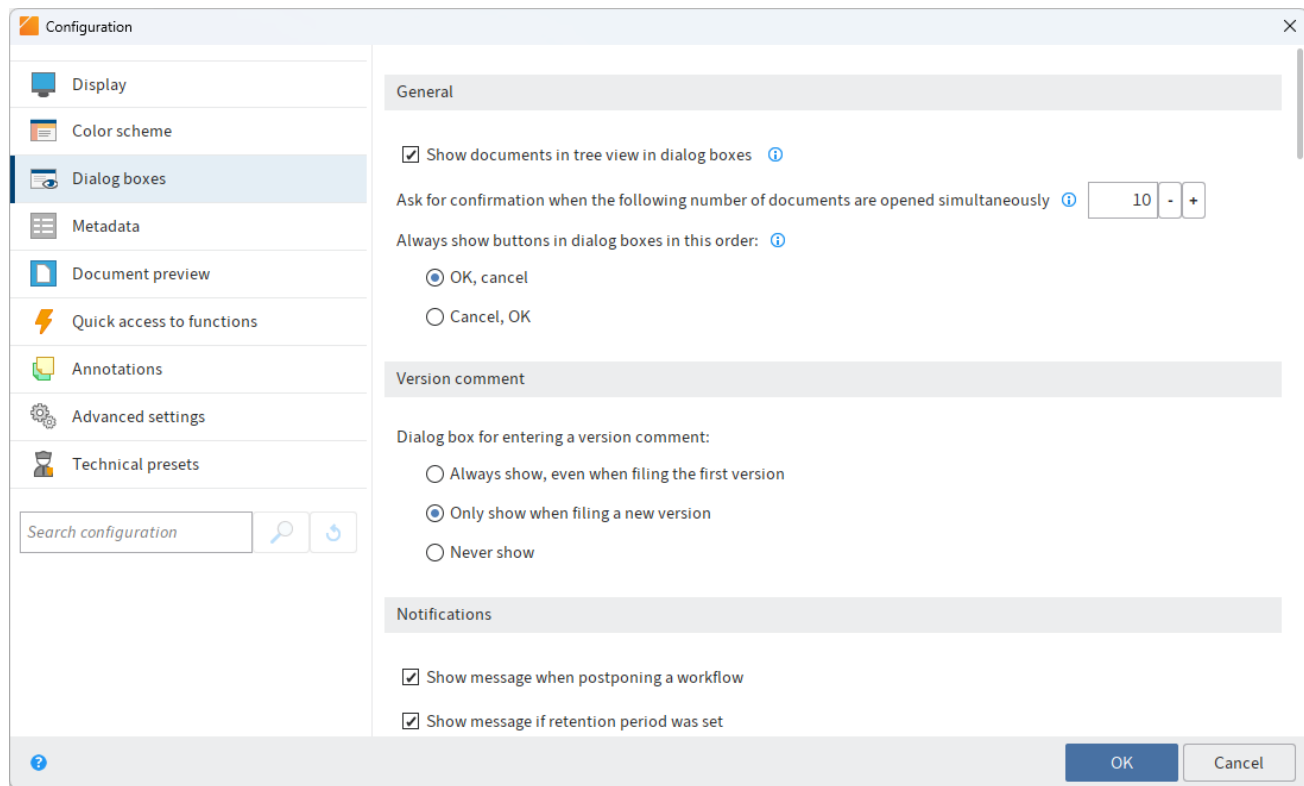
You can change the display mode via the preview images. You can select from five display modes:

- Default: The display adjusts automatically according to the settings of your operating system.
- Light
- 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



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

- General
- Version comment
- Notifications
- 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
- Login 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.

Notifications

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 Inray: Documents in the Inray have not been filed to ELO yet. If you delete documents in the Inray, the documents (and metadata) are removed and cannot be restored. Select this option to show a message when deleting Inray 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.

Login dialog box

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

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

Configuration - Metadata

The screenshot shows the 'Configuration - Metadata' dialog box. On the left is a sidebar with a list of configuration categories: Display, Color scheme, Dialog boxes, Metadata (selected), Document preview, Quick access to functions, Annotations, Advanced settings, and Technical presets. Below this list is a search bar labeled 'Search configuration' with a magnifying glass icon and a refresh icon. The main area of the dialog is divided into several sections. The 'General' section contains four checkboxes: 'Use default keyword list for fields' (unchecked), 'Sort keyword lists alphabetically' (unchecked), 'Automatically activate keyword list filter' (checked), and 'Show "Metadata" dialog box on filing if a metadata form has not been assigned' (checked). The 'Show metadata' section contains one checkbox: 'Show extra text in the metadata preview' (unchecked). The 'Default settings for metadata' section contains three dropdown menus: 'Metadata form for new folders' (set to 'Folder'), 'Form for new documents' (set to 'Basic entry'), and 'Form for the metadata search' (set to 'Search'). At the bottom, there is a section for 'Metadata form for different file types' which is currently empty. The dialog box has an 'OK' button and a 'Cancel' button at the bottom right.

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.

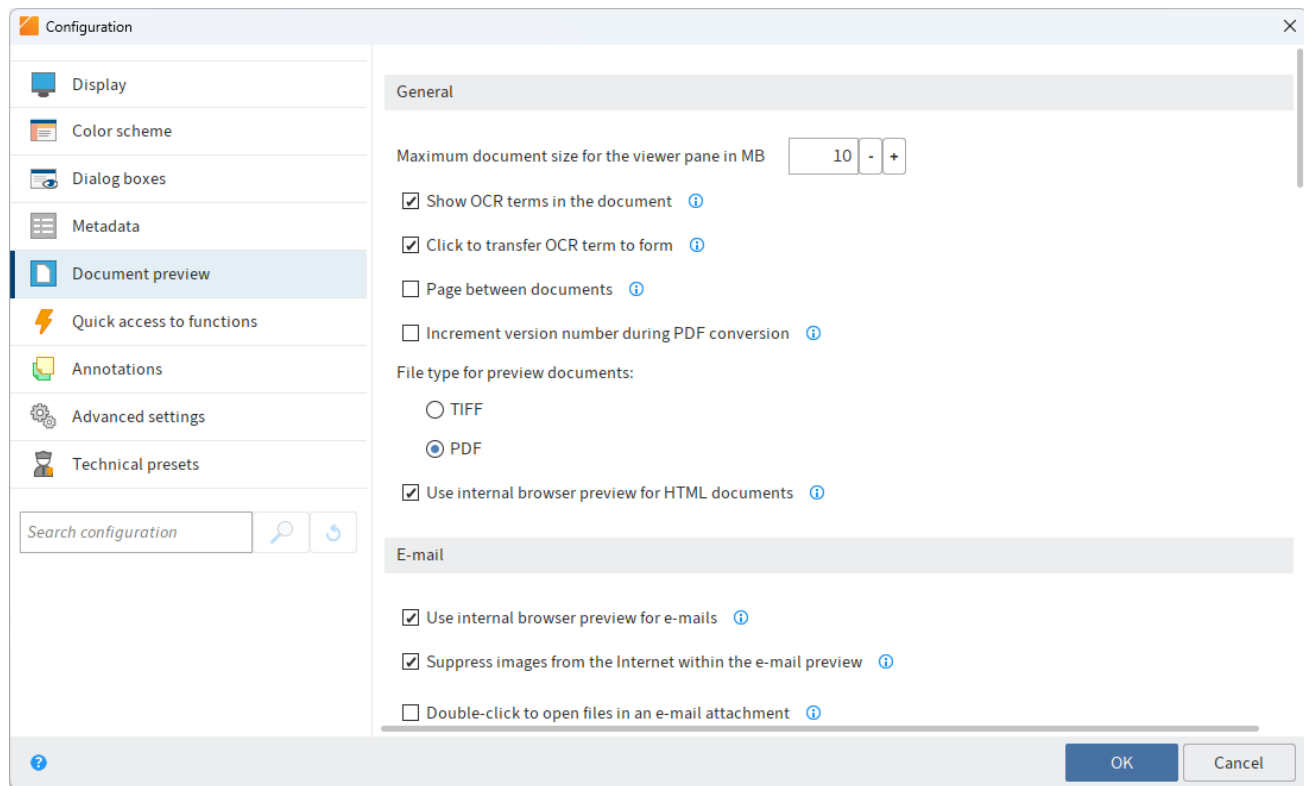
By default, the *.js* and *.vbs* file extensions are linked to the *ELOScripts* metadata form and the *.eml* and *.msg* file extensions are linked to the *E-mail* metadata form.

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.

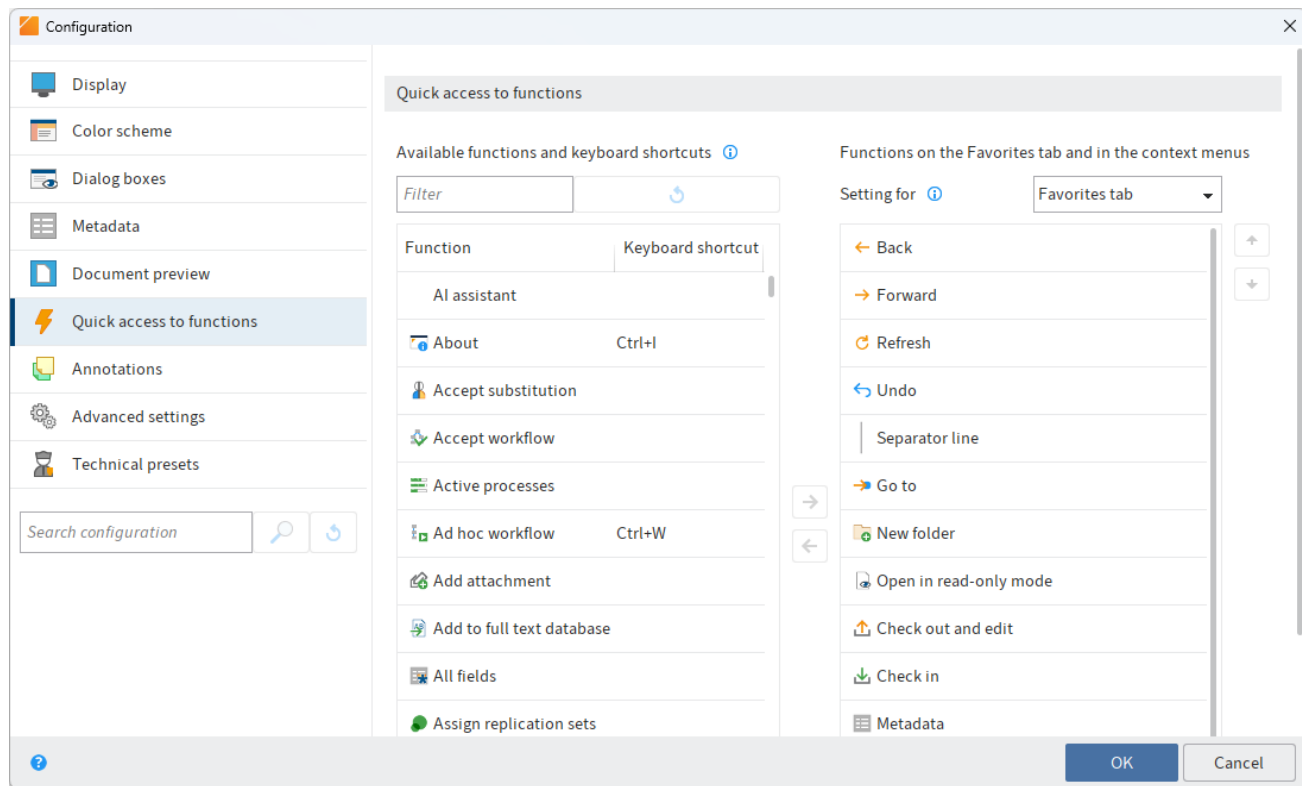
Preview plug-ins

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
- Inquery 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).

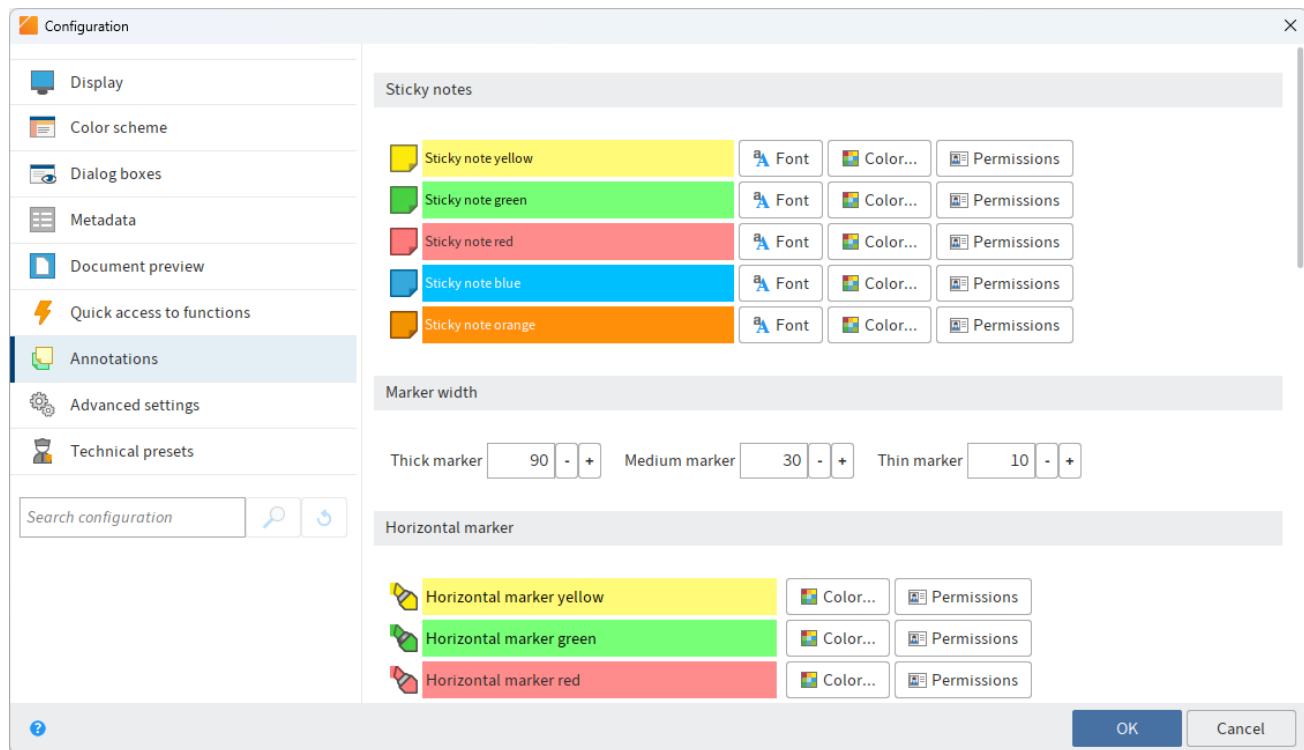
Information

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.

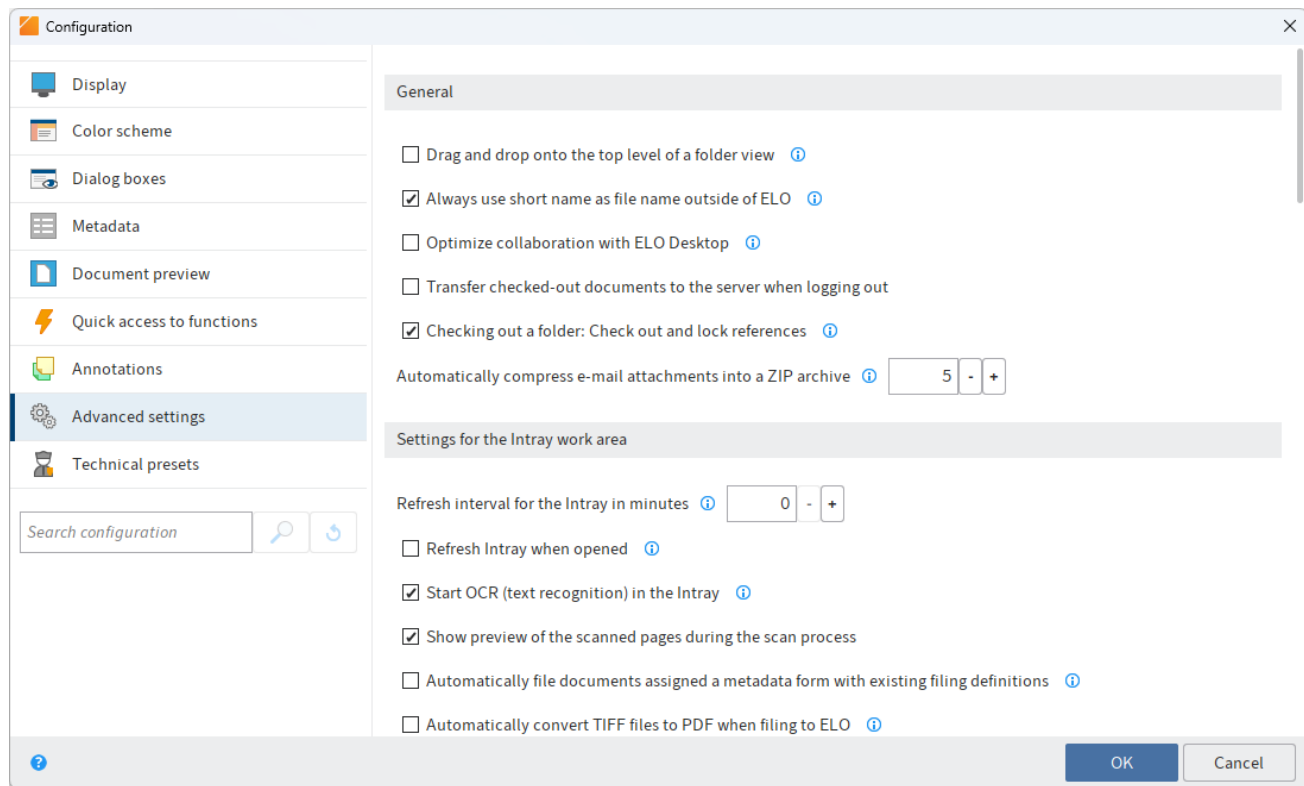
Text note configuration

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 out: If you log into 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 Inray on server when logging out: Select this option to save checked out documents to the *Inray* work area after the user logs out. If the user logs into another workstation, they have access to their Inray documents.

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.

Inray folder in the file system

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

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

Information

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

Directory: This field shows the path to the designated Inray 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.

Display time in workflow nodes: Use this option to display the time that the workflow node was last edited.

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

Process tasks with "Forward workflow" dialog box: If this option is enabled, you have to use the *Forward workflow* function to process and forward the workflow in a new dialog box. If the option is disabled, workflows without a form template are shown in the *Tasks* work area in a standard form and can be processed there.

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.

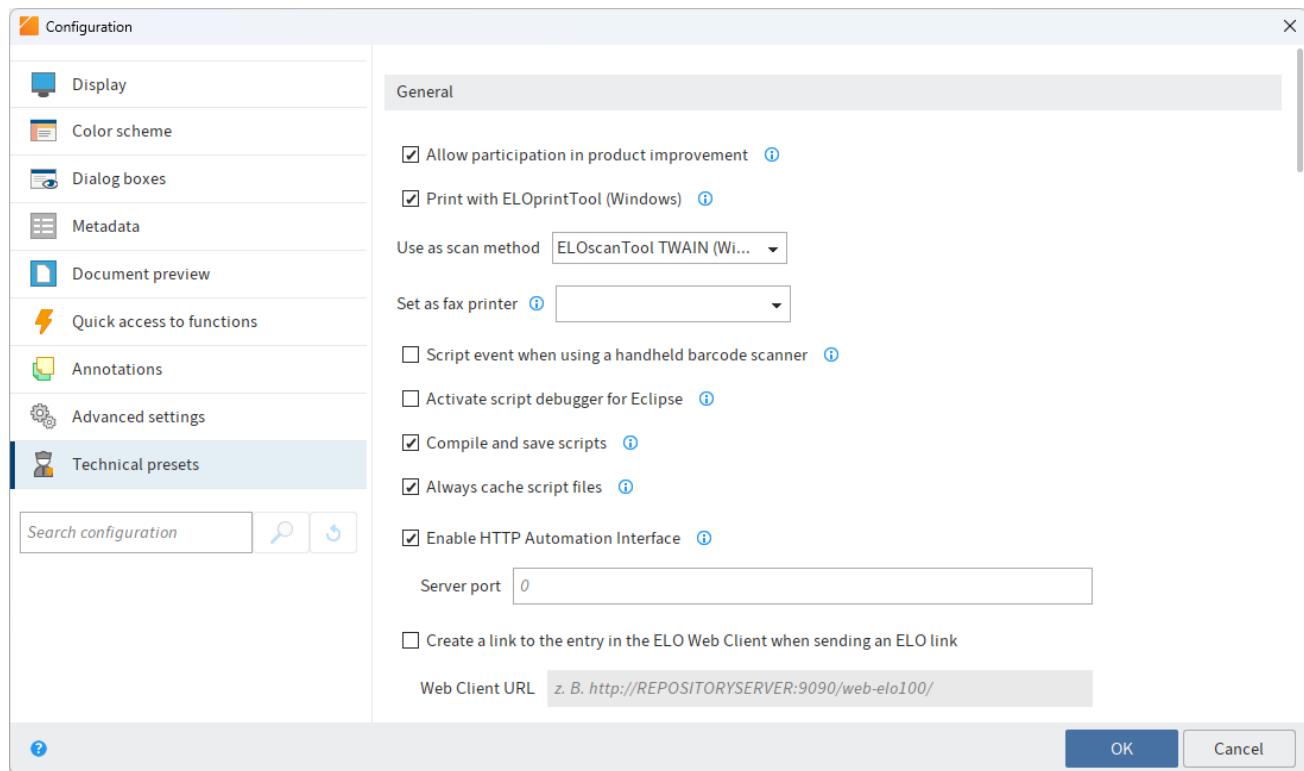
Choose from the following options:

- 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.

Information

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.

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.

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*.