



ELO Java Client

Tasks



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Tasks

Complete tasks with workflows

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.

Tasks are displayed in the *Tasks* work area. The *Refresh* function updates your task list. New tasks are indicated by a green dot.

Information

Monitoring functionality is also available in the *Tasks* work area. You will find more information in the Organize entries > Monitor changes chapter.

Start workflow

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.

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*).

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

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.

Start ad hoc workflow

The *Ad hoc workflow* function (available in: *Ribbon > New > Create task*) enables you to start 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.

Method

1. Select the entry you want to start an ad hoc workflow for.
2. On the ribbon, select the *New tab > Create task > Ad hoc workflow*.
3. Configure the settings for the ad hoc workflow.
4. Select *Completion options* and configure additional settings for the ad hoc workflow here, for example:

Success message: The text from this field is shown to the recipient once the ad hoc workflow has been completed. It appears in the recipient's *Tasks* work area.

Cancellation message (approval workflows only): The text from this field is shown to the recipient if the ad hoc workflow has been canceled. It appears in the recipient's *Tasks* work area.

Withdraw the workflow from all users as soon as one user does not approve it (parallel approval workflows only): If this option is enabled, all recipients must approve the workflow. Otherwise, the ad hoc workflow is canceled entirely and the task is removed from the tasks of the other selected users. In your tasks and on your home screen, the message *Not approved* will appear in *My ELO* under *My recently started workflows*.

End script: If required, select a script that is executed after the ad hoc workflow is completed.

5. Select OK.

Result

The workflow is started and displayed in the *Tasks* work area of the selected users.

Settings for the ad hoc workflow

The following options are available:

The screenshot shows the 'Start ad hoc workflow' dialog box. A red box labeled '1' highlights the 'Name' input field containing 'EX10_Invoice_Contelo_0753'. A red box labeled '2' points to the 'Serial approval' workflow type icon, which is selected. A red box labeled '3' points to the 'Priority' dropdown menu, which is set to 'A'.

1 Name: Workflow display name

2 Ad hoc workflow type: Serial workflows are forwarded to the responsible users sequentially. Parallel workflows are sent to all involved users at the same time.

3 Priority: You can sort and filter the task list according to priorities.

The screenshot shows the 'Start ad hoc workflow' dialog box. A red box labeled '4' points to the folder icon (Load ad hoc workflow from template). A red box labeled '5' points to the disk icon (Save as template). A red box labeled '6' points to the 'X' icon (Delete an existing template).

4 Load ad hoc workflow from template (folder icon): Opens ad hoc workflows saved as a template.

5 Save as template (disk icon): Saves the current ad hoc workflow as a template. You can assign a name to the template.

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.

6 Delete an existing template (X icon)

Please note

If you delete the original template, any references that you have created will also be deleted.

The screenshot shows the 'User selection and job instruction' interface. At the top is a search bar labeled 'Add user/group' (7). Below it is a list of users and groups (8): Anderson Approval, GRP_ADMIN Approval (selected), and Byte Approval. To the right, there is a 'Job instruction' dropdown (9) set to 'Approval', an 'Escalation management' button, and a list of 'Members of the group' (9) including Santini, Cole, and Rorschach. At the bottom, there are controls for changing order (10) and an 'Expand' button (11).

7 Add user/group

8 Users and groups that were added to the workflow

9 Members of the group: This list appears if you select a group.

10 Change order: To change the order of recipients in serial ad hoc workflows, select a recipient and change their position using the arrows (or drag-and-drop).

11 Expand: Show the individual members of a selected group. To do so, select the corresponding group and then click *Expand*. You can remove members by selecting the X icon.

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.

Job instruction ⓘ

Approval

Escalation management

Members of the group

Santini
Cole
Rorschach

OK Cancel

12 Enter job instruction: Enter the individual job instruction for the user selected in the list here. You can select multiple. The user sees the job instruction in the *Workflow step* column of the *Tasks* work area as soon as they have accepted the workflow.

Information

The job instruction can have a maximum of 128 characters.

13 Escalation management: Specify how long the workflow may remain with the respective user or group here. You can also select a user or group to be notified if the deadline is missed.

Information

If the workflow has escalated, it appears in the *Tasks* work area of the responsible users and in *My ELO* under *Escalated workflows*. Selecting an escalated workflow in *My ELO* takes you to the escalated workflow in your *Tasks* work area.

Edit 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.

You have the following options for completing your task:

- The workflow contains a form. You will see the form in the viewer pane on the *Form* or *Metadata* tab. In this case, forward the workflow by selecting the button on the form.
-

You can use the 'Forward workflow' function to process the workflow in a dialog box. You must have enabled the option *Process tasks with "Forward workflow" dialog box* in the configuration under *Advanced settings > Workflow*.

Information

You can also forward a workflow by double-clicking the entry in the task list.

- 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.

Information

If you are unable to accept a group task, you need the corresponding role. You can enable roles via *User menu [your name] > Enable roles*.

Information

If a group member selects or accepts a group task, the task is marked as read for all group members. If a group task is returned, it remains marked as read for all group members.

Method with form

If you receive a workflow that you want to forward with a form, you can edit it on the *Form* or *Metadata* tab in the viewer pane.

1. Select the workflow that you want to forward.
2. Edit the fields of the form as indicated in the task.

The screenshot displays the ELO Java Client interface. At the top, there's a navigation bar with 'Task', 'Document', and 'Search functions' tabs. Below this, a sidebar on the left lists document types: 'AddNoteConfirmFlo', 'Order', 'Invoice', and 'Order'. The main area shows a workflow form for 'Offer_EX10 node 3'. The form has several input fields: 'Article number' (234455877744), 'Article name' (Pen), 'Pieces' (10), 'Unit price' (0.49), and 'Subtotal' (4.90). A 'Total' field also shows 4.90. A 'Next processing step' section is highlighted with a red box, containing a 'Finish process' button. Below this, there are 'Save without passing forward', 'Save', and 'Print' buttons. On the right, there's a 'Form' tab and a 'Version 1' document. A notification at the bottom right says 'Administrator filed a new document.' and 'Aug 17, 2021, 9:46 AM'.

- 3.

To forward the workflow, select the corresponding button within the form.

Depending on which settings apply for the current node, you can select one or more successor nodes under *Forward*.

Method with dialog box

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

First check

Comments ⓘ

Forward

Select the next workflow step:

→ End node

?

Cancel

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*.

3. 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.

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.

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

Add user/group

GRP_POST

×

Members of the group

Cole

☒ Notify after processing the node

Name

Approval

Note

?

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.

Return task to me after the node is processed: 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.

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 indicated by 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.

Information

If you are unable to accept a group task, you need the corresponding role. You can enable roles via *User menu [your name] > Enable roles*.

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 can find more information in the Create tile chapter.

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.

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.

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.

Workflows for this entry "EX10_Invoice_Contelo_0061"

Status

- ☐ Active
- ☐ Passed deadlines only
- ☐ Completed
- ☐ Load fields
- ☒ All workflows

User

Start date

of

to

Display

☒ Display

☐ Hide

☐ Show

☐ Show details

Name

Order

Order

Farrell

Start: 27 Oct 2025, 12:20

Review order

GRP_ACCOUNTING

Start: 27 Oct 2025, 12:20

OK

Not OK

Approval

Farrell

Node settings

General

Type

Icon

User

Apply **OK** **Cancel**

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.

Users

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.

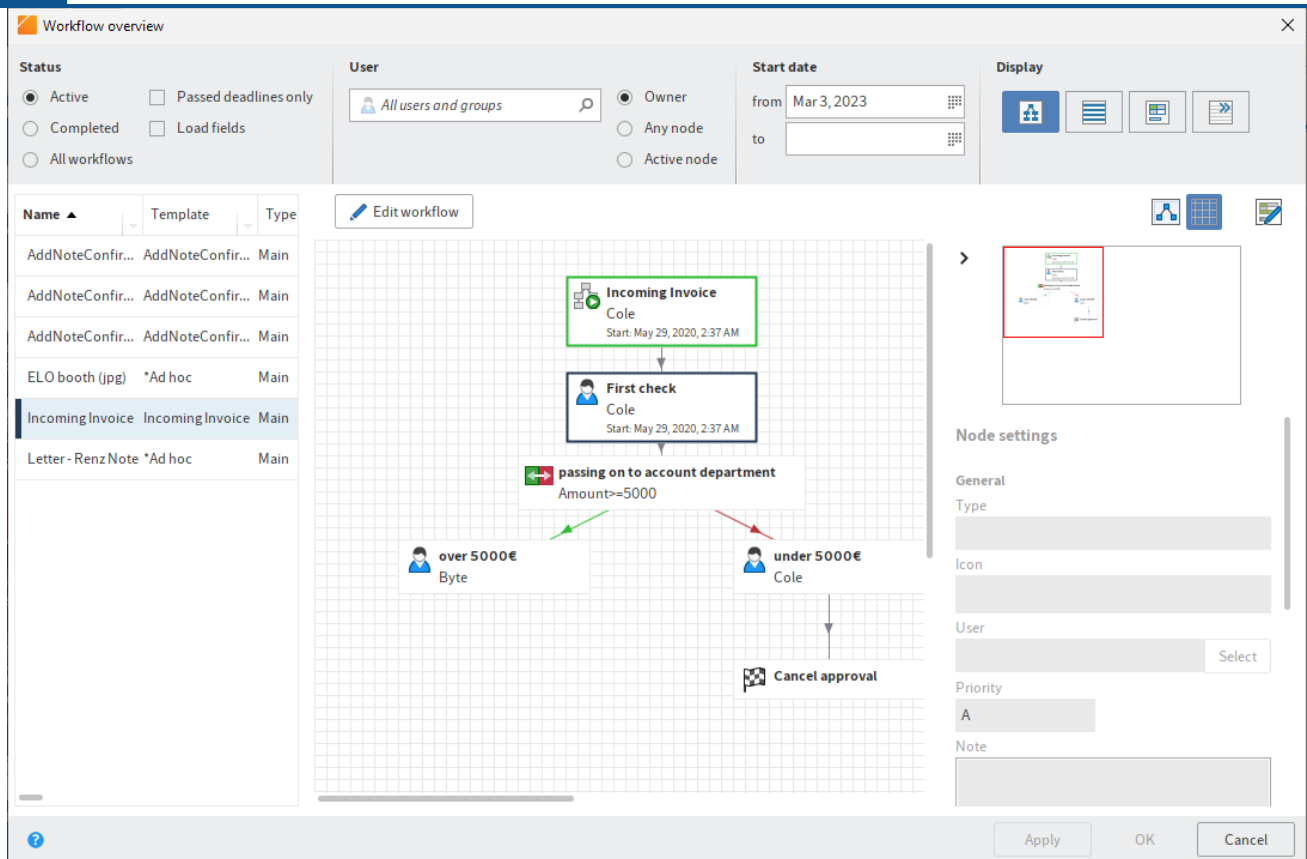
OK: Select *OK* to save changes and close the dialog box.

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.

Workflow overview

Available in: *Ribbon > Organize > Overviews*



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.

Users

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:

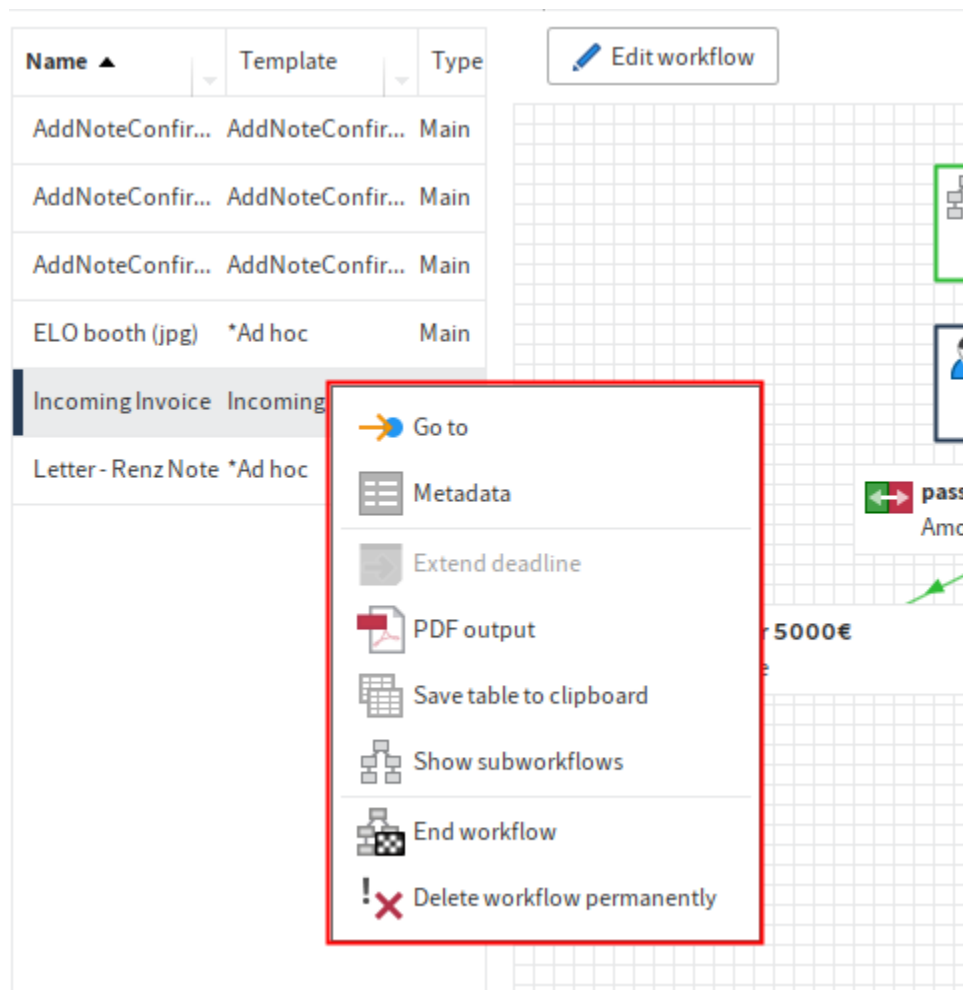
-

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.

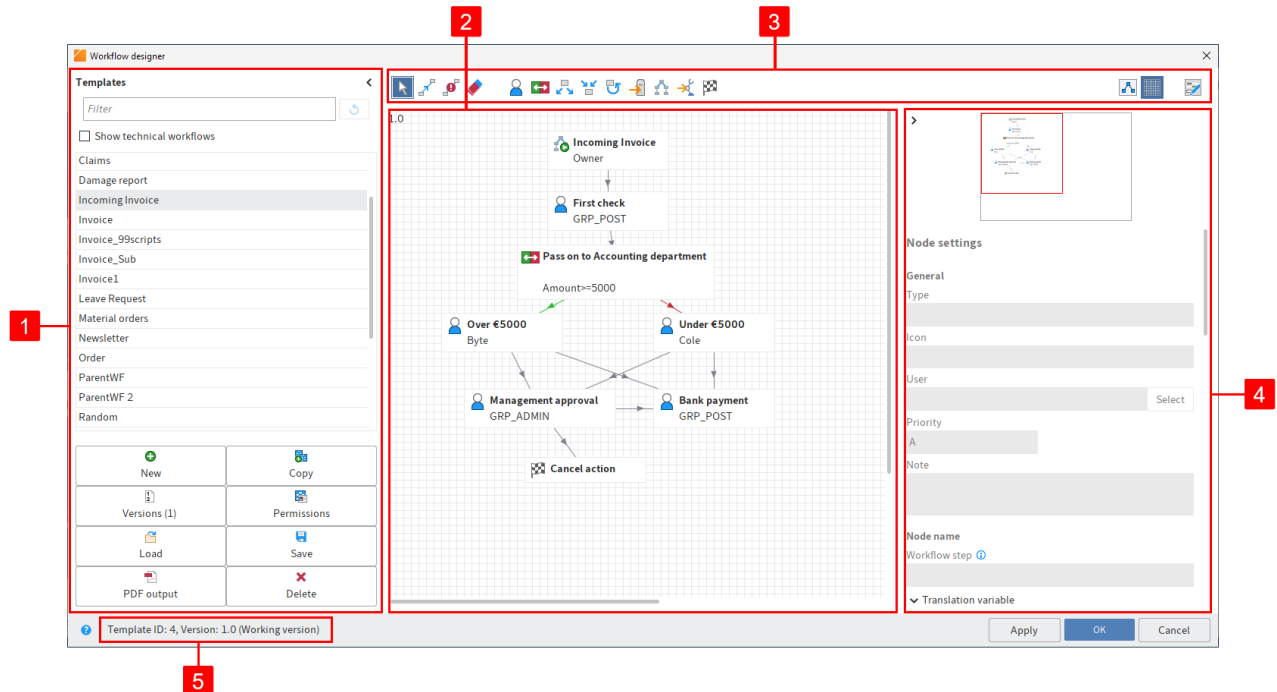
Workflow designer

Information

Der Workflowdesigner ist nicht in ELOprofessional for Small Business verfügbar.

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*

Form designer

Form Template Tab group Refresh Close Assignment

New Insert System

Forms

- basic_claim
- freeentry
- invoice
- multitab
- offline_scriptexamples
- order**
- other
- tst

Components for order

- approval
- article
- article_protection
- articles
- basic
- extra
- fruits
- item
- item_protection
- order
- purchaser
- tab1
- tabs
- Edit form header scripts

?

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.

Organize reminders

The *Reminder* function (available in *Ribbon > New > Create task*) enables you 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 the 'Reminder' dialog box with the following details:

- Name:** EX10_Invoice_Contelo_0061
- Deadline:** (empty field)
- Created on:** 22 Oct 2025, 11:04
- Viewed on:** (empty field)
- Priority:** B
- From user:** Farrell
- For user:** Add user/group (dropdown menu)
- User selection:** A list of users is shown, with 'Farrell' selected.
- Expand:** A button to expand the user selection list.
- Note:** A large text area for additional notes.
- Buttons:** OK and Cancel buttons at the bottom right.

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:

- To display all reminders associated with an entry, select the entry and select *Ribbon > Organize > Overviews > Reminders for entry*.
- You can open an overview of your reminders under *Ribbon > Organize > Overviews > Reminders overview*. You can view and edit the reminders here.

Edit reminder

You can edit an existing reminder with the *Edit reminder* function (available in the *Tasks work area > Ribbon > Task > Edit*). You can view and edit the current settings.

Alternative: You can also edit a reminder with the *Reminder* function.

Delete reminder

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*).
- Use the *Delete reminder* function (available in: *Ribbon > Organize > Overviews > Reminders overview*)