ELO Teamroom

ELO Teamroom

Table of contents

Basics

What is ELO Teamroom?

ELO Teamroom acts as a platform for collaboration across teams. It enables multiple parties to collaborate even if not all members have access to the initiator's main repository. This could be different companies, such as associations in the construction sector, but it can also be relevant within the company if different departments have their own repositories. A lean ELO Teamroom Client that runs in a web browser also provides all users with basic functions such as searching, filing, and showing entries.

Target audience

This manual is addressed to ELO Teamroom users. Separate documentation is available for administrators.

The scope of functions presented in this documentation may differ greatly from those in your client.

If you do not find functions described in this documentation in your client, you do not have permission to perform the action.

Getting started

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

- Important actions in detail: This chapter introduces you to some important features with detailed step-by-step instructions and explanations. With the help of these instructions, you will learn basic actions in the ELO client, which can be applied to most other functions.
- Program interface, Navigation and use, Important components: These chapters explain the interface and how to use ELO in general. They cover individual topics at a more advanced level.

Structure of the documentation

The goal of this documentation is to explain the functions of ELO Teamroom.

Basics

The first chapter contains general information about using the documentation and an overview of the chapter contents.

Program interface

This chapter contains an introduction to the ELO Teamroom program interface.

Navigation and use

This chapter provides information about the general use of ELO Teamroom.

Important components

This chapter contains a description of important components of ELO Teamroom.

Important actions in detail

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

Functions

The remaining chapters cover the functions that are not described in the *Important actions in detail* chapter.

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

want to create a teamroom?

- New teamroom

want to join a teamroom?

- Join teamroom

want to add members?

- Invite external users
- Add user

want to create entries?

- New entry
- Insert file
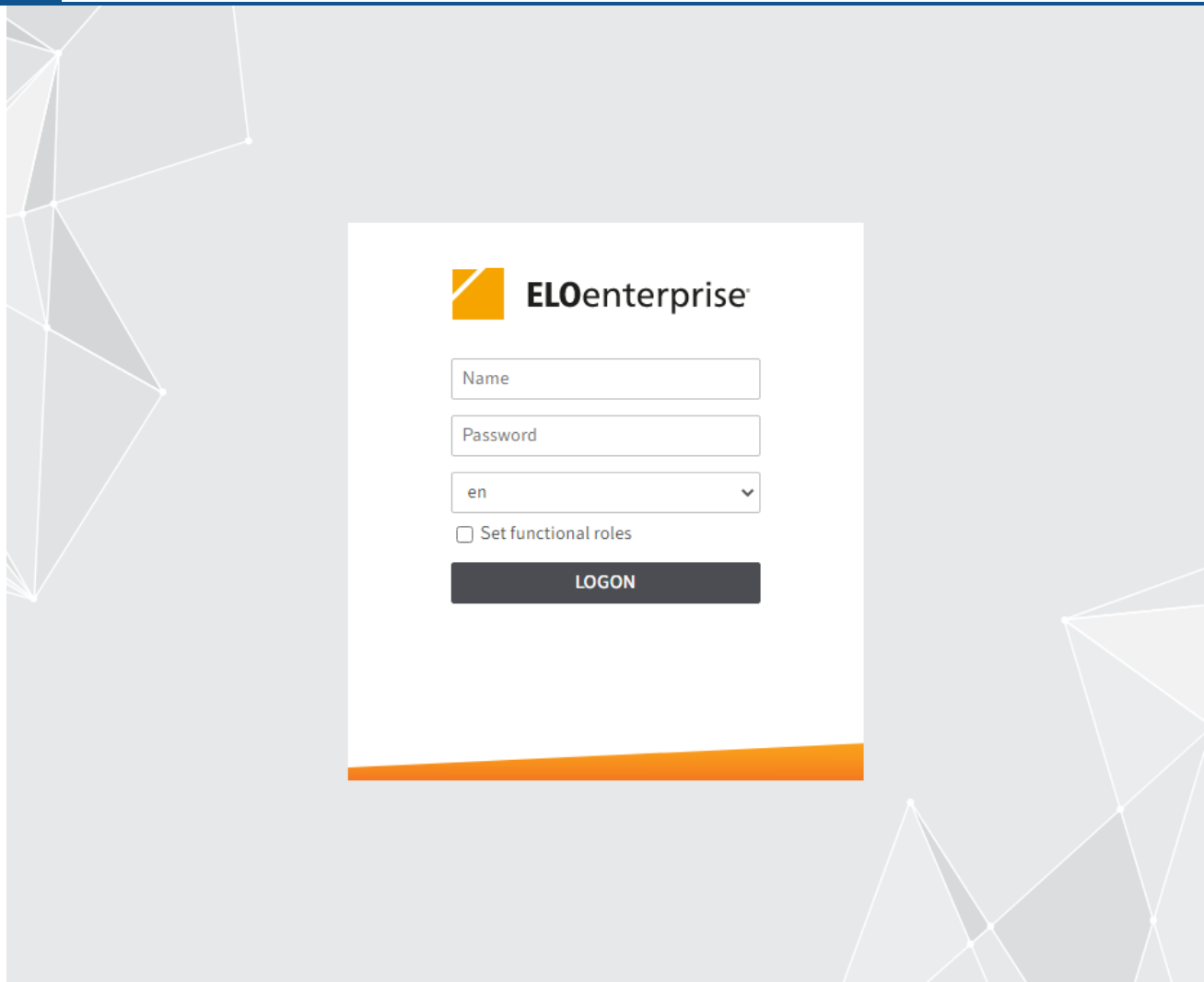- Drag-and-drop

want to update entries?

- Load new version
- Drag-and-drop
- Edit in Microsoft Office

want to structure the teamroom?

- Move
- Delete

Start ELO Teamroom

To start ELO Teamroom, enter the URL in your browser.

Enter your logon credentials. If you have been given a temporary password to log on with, change it during the first session using the Change password function.

> **Information**
>
> If you have forgotten your password, contact your system administrator.

If you have been invited to join an ELO Teamroom, you can set your own password. To learn how to join a teamroom, refer to the Join a teamroom chapter.

Program interface

This chapter contains basic information on the ELO Teamroom interface. It is meant to help you find your way around the client.
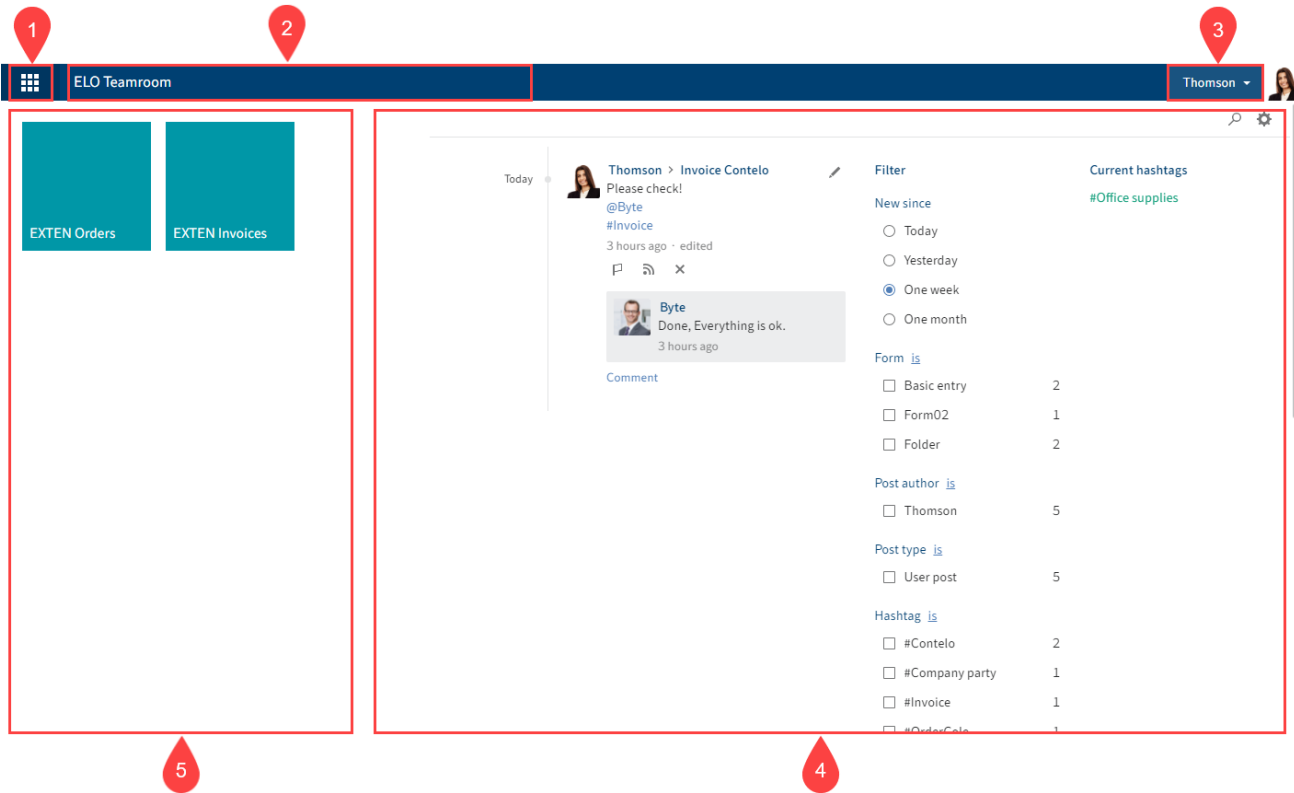
The ELO Teamroom program interface is divided into the following areas:

1 'My ELO' button: This button takes you to the *My ELO* home screen.

2 Ribbon: On the ribbon, you will find the functions available to you in the teamroom. The ribbon with the functions only appears in the respective teamroom.

3 User menu [your name]: In the user menu, you will find various functions mainly for your personal settings.

4 News: This area helps you to keep track of developments in ELO.

5 Tile navigation: The tile navigation takes you to ELO Teamroom.

'My ELO' work area

The *My ELO* work area is the home screen. The tiles here provide access to the teamrooms you created or are participating in.
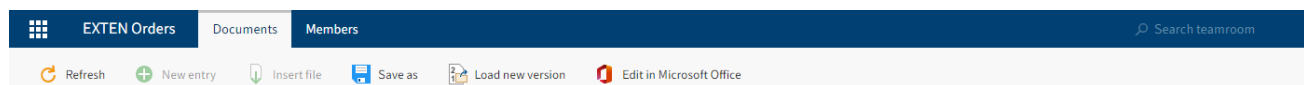
'My ELO' button

Click the *My ELO* button to open the ['My ELO' work area](#).

Here, you will find your news and the tile navigation.

Ribbon

You can launch functions from the ribbon.

The ribbon provides access to most functions in ELO.

> **Information**
>
> The ribbon is only available when you are in a teamroom and not on the *My ELO* screen.

Tabs: The ribbon is organized into tabs. The tabs are only shown if the tab functions can be used (contextual tabs).

The contextual tabs are:

- Documents
- Members

Functions: The functions are arranged logically by relation. The most important functions are pinned to the ribbon. If a function is grayed out, you cannot use it at your current position in ELO. Some functions only appear after you have selected an entry.

Search teamroom: You can search for entries in the teamroom using the search field. If you click an entry in the list of results, it is shown in the preview pane.

User menu [your name]

User menu [your name]

Clicking the *User menu [your name]* button opens a drop-down menu. This menu takes you to areas where you can configure settings for your user account. You can also log off at the end of your session here.

You can find explanations on each of these functions in the chapter User menu [your name].

News

The *News* area helps you keep track of changes in ELO.

You will see feed posts from different entries here. Some examples include feeds you have subscribed to or in which you have been mentioned by another user. You will also see a hashtag cloud.

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

Tile navigation

The tile navigation contains all the available teamrooms. Use the tiles to go to the respective teamroom and access the contents.

Navigation and use

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

How do I use a function?

Contextual functions: Functions can only be selected if they can be used in the current context. Otherwise, they are grayed out or are not displayed at all. Most functions are contextual.

To use them, you must establish a reference to a folder or document by selecting it. Once you have selected the entry, click the function. In most cases, this opens a dialog box or another control element with instructions on how to proceed.

Non-contextual function: Some functions are not contextual and can be used at any time. These functions are not related to selected entries. *Refresh* is an example of a non-contextual function.

How do I select multiple entries?

You can select multiple folders or documents at once to execute a function on all selected entries. You can only select multiple entries in the viewer pane.
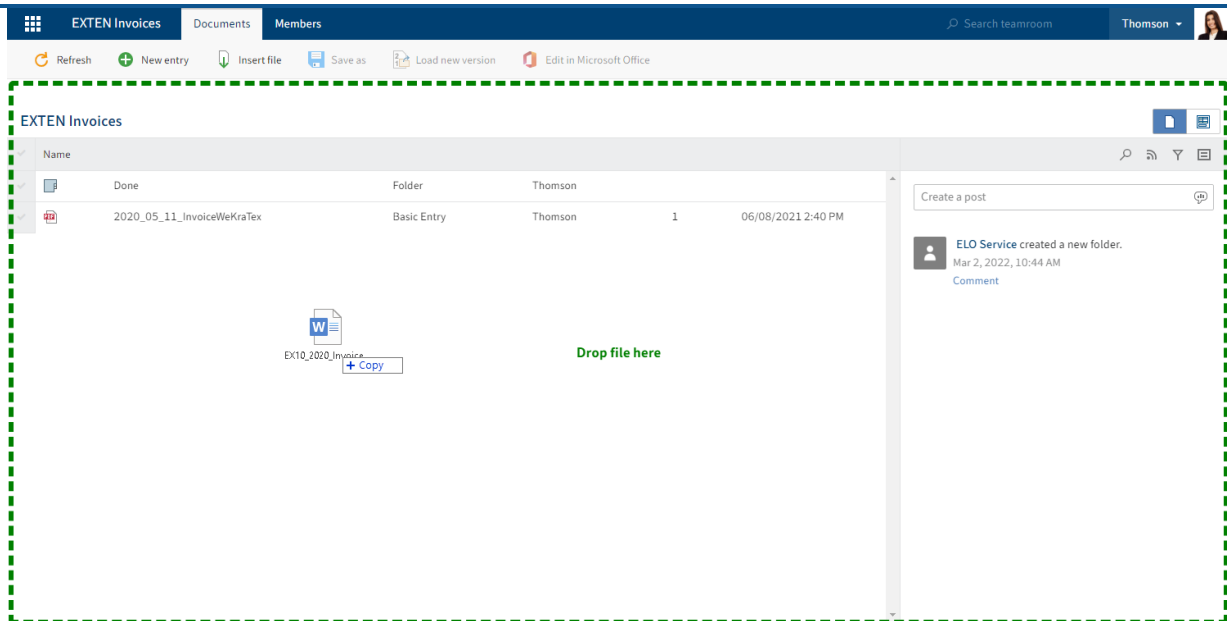

Method

1. Select entries by clicking on the light gray check mark to the left of the icon of the entry.
2. On the ribbon, click the function you want to use, e.g. *Move*.
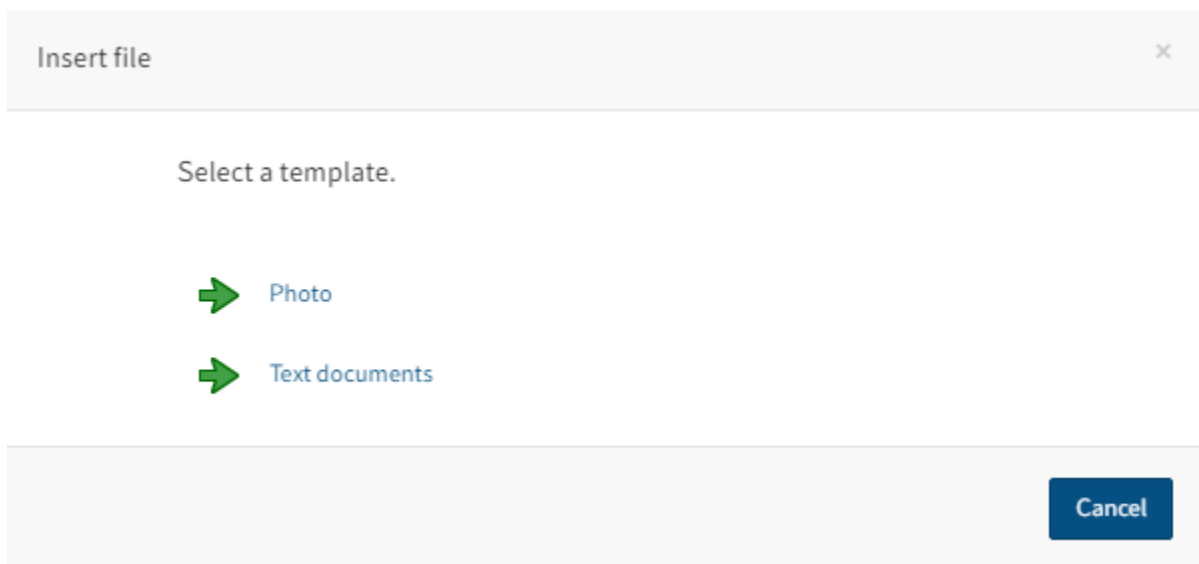
Drag-and-drop

You can also execute some functions on the ribbon using a drag-and-drop action.

Insert file

1. Go to the teamroom that you want to upload a file to.

2. Click the document in your file system that you want to file and drag it to the client.

The *Insert file* dialog box opens.

3. Select a template.

Insert file: Text documents   ×

Short name

EX10_2020_Invoice_Contelo

File

EX10_2020_Invoice_Contelo.docx

Version

1

Comment

Comment

Save   Cancel

4. Change the name if required. The name of the document is automatically used as the short name.

   Optional: Enter a comment in the *Comment* field.

5. Click *Save*.

Result

The file was uploaded to the teamroom.

Load new version

1. Click the document in ELO Teamroom you want to upload a new version of.

2. Click the document in your file system that you want to file and drag it to the client.

The *Load new version* dialog box appears.

Optional: Enter a comment in the *Comment* field.

3. Click *Save*.

Result

The new version was stored in your teamroom.

Important components

This chapter introduces important ELO Teamroom components. It contains information about the viewer pane, forms, and the ELO feed.

> **Information**
>
> You can only work with gen. 1 metadata in ELO Teamroom.

Viewer pane

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

Each entry is made up of three elements:

- Content
- Form
- Feed

Content and form are shown on the left, while the feed is always located on the right.
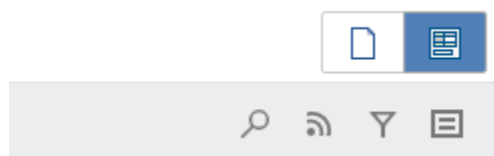
You can switch between the content view and the form view using the tabs.

Form

You can display a form for the selected entry (folder or document). To do so, use the button to the right above the feed.

You can change the short name of the entry or enter additional information here.

Save your entries with the *Save* button.

Feed

You will find automatically generated information on the entry in the feed and can discuss the entry with other users here.

When you subscribe to a feed for an entry, any new posts in the feed are shown on your *My ELO* home screen.

If you tag users with @, the post will also appear in the feed on their *My ELO* home screen even if they have not subscribed to the feed.

The following message types are shown in the feed:

•

Posts (written by a user)
- Comments (on a post)
- Polls
- Events (e.g. when a new version of a document is filed or changes are made to the working version)

Create post

Use the *Create a post* field to comment on the respective entry in a feed. Click *Create* to post the comment.

Alternative: Press CTRL+ENTER to submit a post.

The text in posts, polls, and comments can be formatted as follows:

Bold: To format a part of the text in *bold* type, place an asterisk (*) at the beginning and end of the text section. I would like to emphasize this *again*. will appear in the ELO feed as follows: "I would like to emphasize this again."

Information

If you want the asterisk to appear as a character in the text, enter a backslash before the asterisk.

Create poll

If you click the *Create poll* button, fields for creating a poll with multiple answer options appear.

Poll duration: With this field, you can specify how long you want the poll to remain open. You can select a value from the drop-down menu or manually enter how many days you want the poll to remain open. For example, if you enter 4, the poll will remain open for four days.

Show additional settings: Clicking this button opens an area with additional settings. You can define whether you want to offer the user multiple options to select from, whether you want the member's user name to be visible in the poll result, and whether you want members to be able to add further answer options.

Click *Create* to start the poll.

Click the pencil icon to edit a poll that has already started. You can edit the poll as long as no one has taken part yet.

Click the X icon to delete a poll that has already started. You cannot undo this.

Mention

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

Alternative: As soon as you type an @ character, ELO automatically recognizes that you want to insert a mention.

Reference
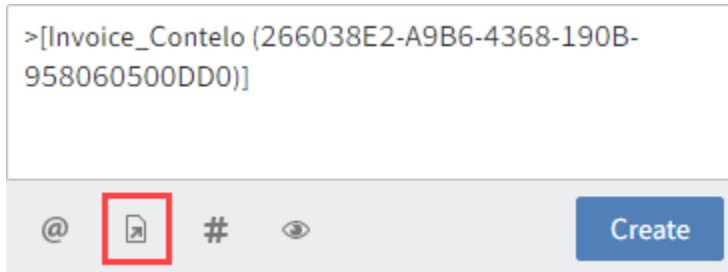
Use the *Reference* button (document icon with arrow) to link a feed post with an entry in ELO Teamroom. Click the reference to go straight to the respective entry.

You can select the entry that you want to refer to in the *Reference* dialog box.

Alternative: As soon as you type a > character, ELO automatically recognizes that you want to insert a reference.

Alternative: Select the entry you want to reference and then press CTRL+C. Click the feed post you want to insert the reference into and press CTRL+V. This requires the current ELOwf version.

Hashtag

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

Alternative: As soon as you type a # character, ELO automatically recognizes that you want to insert a hashtag. The hashtag drop-down menu opens.
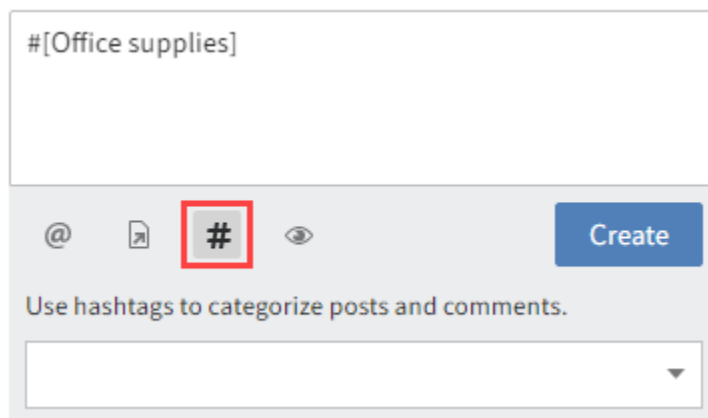
Subscribe to hashtag

Method

1. Click a hashtag to subscribe to it.
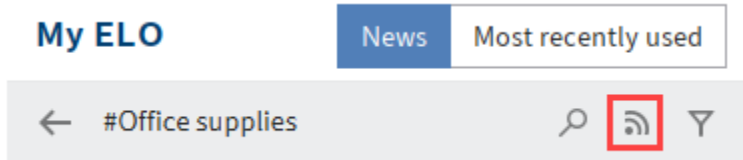
The discussion page for the selected hashtag appears.

2. Click the *Subscribe* button.

Result

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

Visibility

Use the *Visibility* button (eye icon) to restrict who can read the post.

Search feed

Use the *Search feed* button (magnifying glass icon) to search within the currently selected feed. When the search term is found, the feed is narrowed down to the corres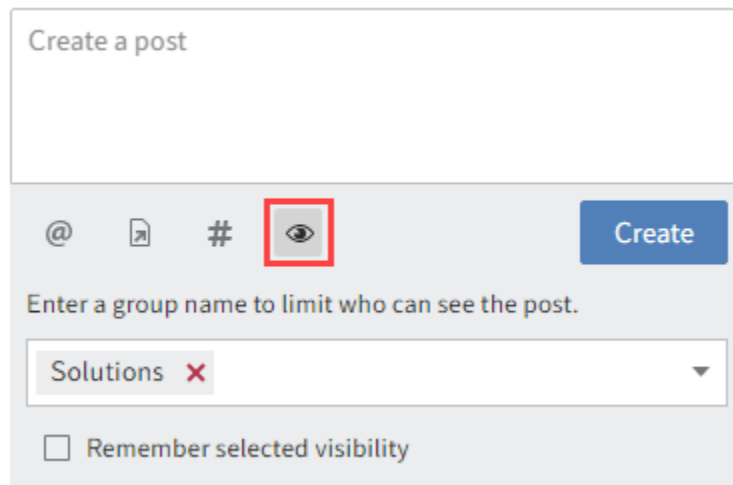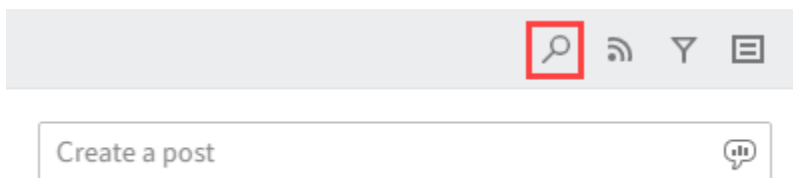ponding posts. The matches are highlighted. Start the search by clicking *Search.* Click *Reset search* to exit the results list and return to the full feed.

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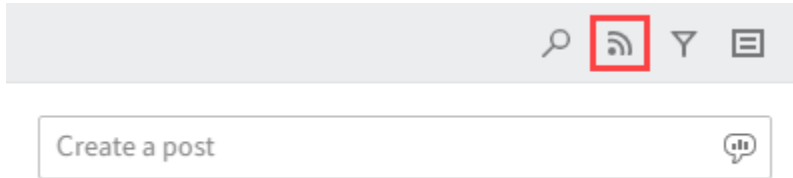
Use the *Subscribe* button (antenna icon) to subscribe to the feed. All feeds you have subscribed to are listed in the *My ELO* work area. Once a post is added to one of these feeds, you also see the post in the *My ELO* work area.

Automatically subscribe to feed
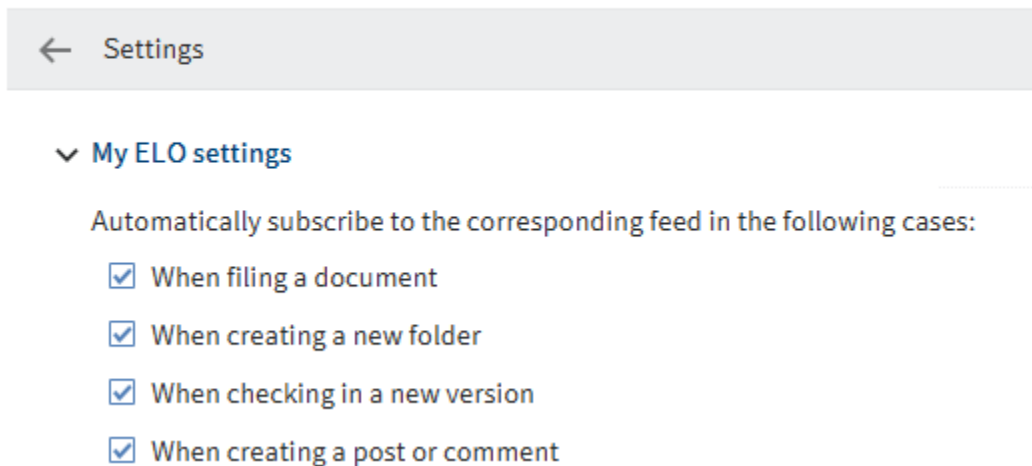
ELO provides you with the option to automatically subscribe to feeds.

You can enable the automatic feed subscription option under *My ELO > Settings.*

Show filter options
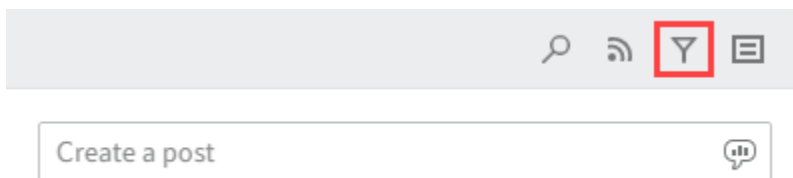
The *Show filter options* button opens a window with filters for the corresponding feed. You can use these filters to restrict the feed to posts that match the respective filter. To close the selection, click the button again.

You can also see when filters are active, even when filter options are hidden.

Enter comment
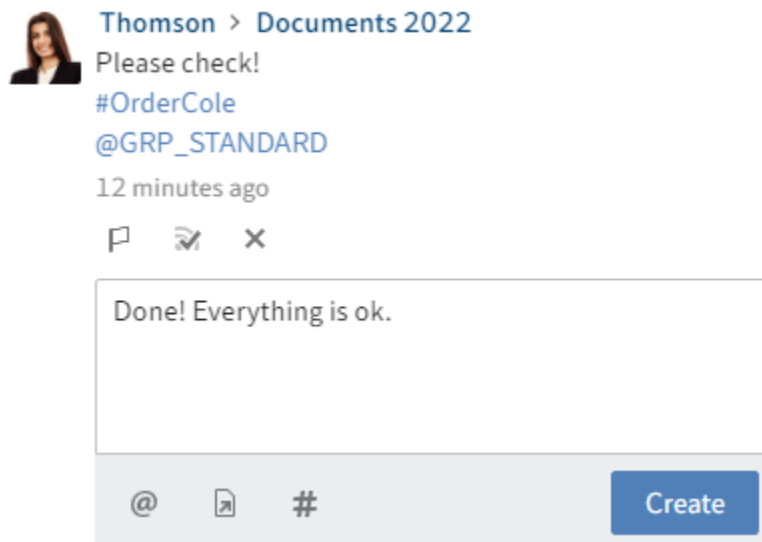
You can enter comments on any post. The procedure for adding a comment is almost identical to creating a post. However, the visibility settings for a comment are bound to the visibility settings for the commented post, which is why you are unable to change the visibility settings for comments.

Edit post
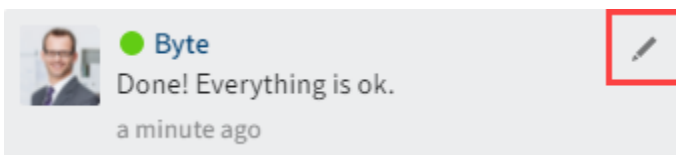
Click the *Edit* button (pencil icon) to edit posts and comments.

Feed history

Edited entries are marked as *edited* below the entry. To open the editing history, click *edited*.

Settings

Click *Settings* to change settings related to the feed.

Show current hashtags

If the preview pane in *My ELO* is not large enough to show hashtag information, the *Show current hashtags* button will appear.

If you click the *Show current hashtags* button, hashtag information is displayed above the subscribed feed.

Hashtag cloud
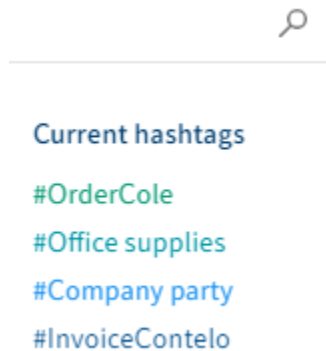
Hashtags that have been used in recent weeks are shown in a hashtag cloud. If you click a hashtag, you will see all feed items that contain that hashtag, provided you have the required permissions.

Show filter options
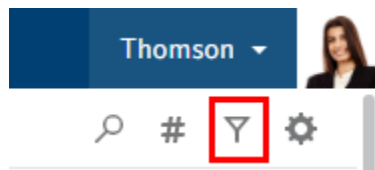
If the preview pane in *My ELO* is not large enough to show the filters, the *Show filter options* button will appear.

Click *Show filter options* to display the filters above the subscribed feed.

To hide the filters, click *Hide filter options*.

Filters in 'My ELO'

Various filter categories are available. The majority is self-explanatory.

Post type The *Post type is* filter option lets you filter the *My ELO* area by the type of post. There are two basic types:

- Automatically created posts (e.g. *working version changed*)
- Posts created by users (e.g. *user posts*)

Apply filters

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

Negate filters

In the default settings, all filters are applied in *is* mode.

The mode can be switched to *is not* in all categories apart from *New since.* Click the word *is* next to the name of the filter category.

Reset filters

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

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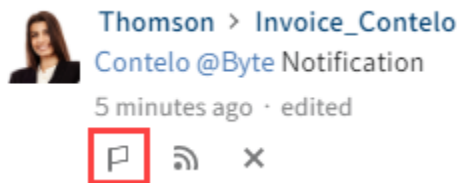
The *Mark as important* button (flag icon) lets you pin a post to the *My ELO* work area. The post remains in *My ELO* even if it is more than one month old. You can recognize posts that are marked as important by the red flag icon.

Delete marker
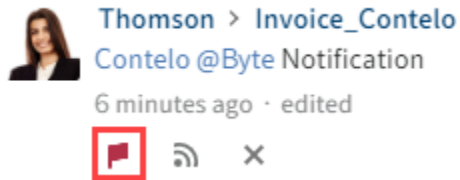
Delete the marker you added to a post with the *Delete marker* button (red flag icon). As soon as the post is more than a month old, it will no longer be displayed in the *My ELO* work area.

Hide post
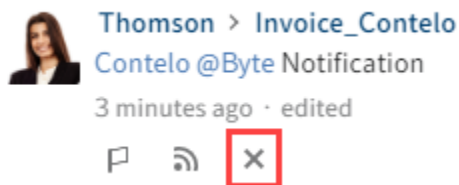
You can hide a post in the *My ELO* work area by clicking the *Remove from My ELO* button.

> **Information**
>
> The *Remove from my ELO* function only hides posts in the *My ELO* area. The entries are not deleted.

After you have hidden a post, you can restore it by clicking the *Undo* button.

> **Information**
>
> With the default settings, the *Undo* button disappears after five seconds. You can edit this option under *Number of seconds to display the "Undo" button before it disappears*. This option is in *My ELO > Settings > My ELO settings*.

Important actions in detail

New teamroom

Before you can use a teamroom, you need to create one first.

> **Please note**
>
> You need corresponding rights to create a teamroom. A teamroom can only be created from a main repository.

Method

1. Open the ELO Java Client.
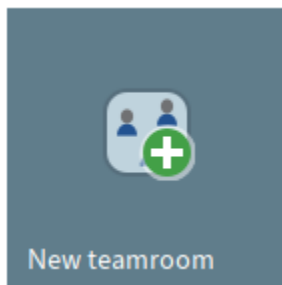
2. Click the *New teamroom* tile.

   Alternative: On the ribbon, click *New > Self-service > New teamroom*.

3.

In the *New teamroom* dialog box, enter a name for the teamroom.

Optional: Enter a description.

4. Click *OK.*

Result

The workflow for approving the teamroom you created has been triggered.

As soon as the teamroom is approved by the person authorized to do so in your company, you can access the teamroom.

Outlook

You can add entries to the teamroom. The ELO Teamroom Client offers different functions for this.

You can add entries from the main repository to the teamroom.

Join teamroom

You can join a teamroom as a guest or member. You will have different rights in the teamroom depending on your role.

If you have been invited to join a teamroom, you will receive an e-mail.

This e-mail contains your logon credentials. The link takes you to the dialog box for logging on to ELO Teamroom.

Method

1. Open the e-mail in your e-mail program.

2. Click the *Log on to teamroom* link.
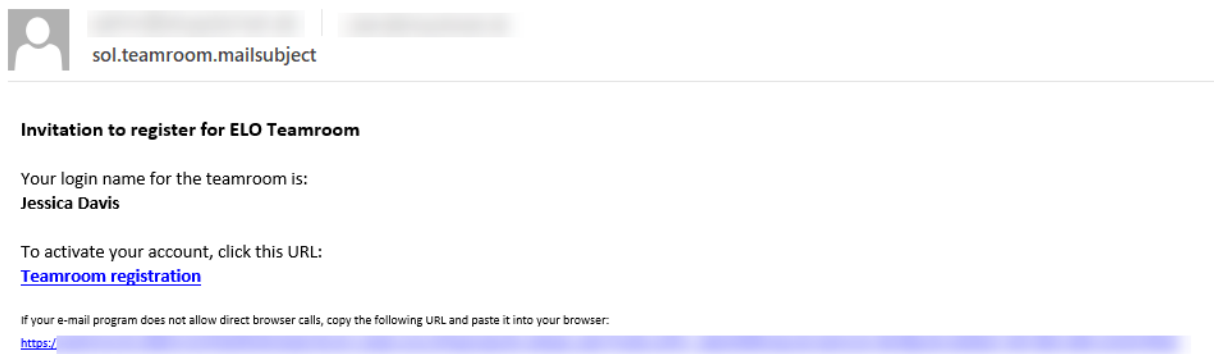
The dialog box for logging on to ELO Teamroom opens in your browser.

3. Enter the logon credentials provided in the e-mail.

4.

Enter a password.

5. Click *Log on*.

Result
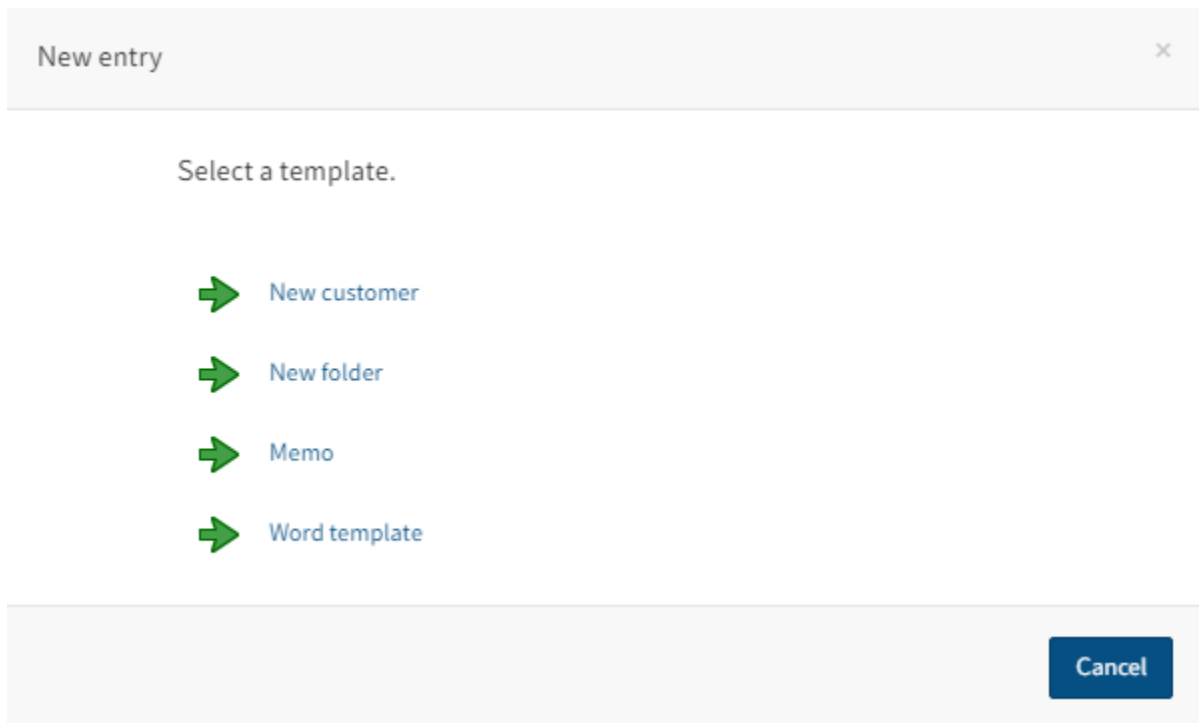
You have joined an ELO Teamroom.

New entry

You can add an entry to a teamroom. There are several templates in ELO Teamroom for this purpose.

Method

1. Go to the teamroom that you want to create a new entry in.

2. One the ribbon, click the *New entry* function.

The following templates are available in the *New entry* dialog box:
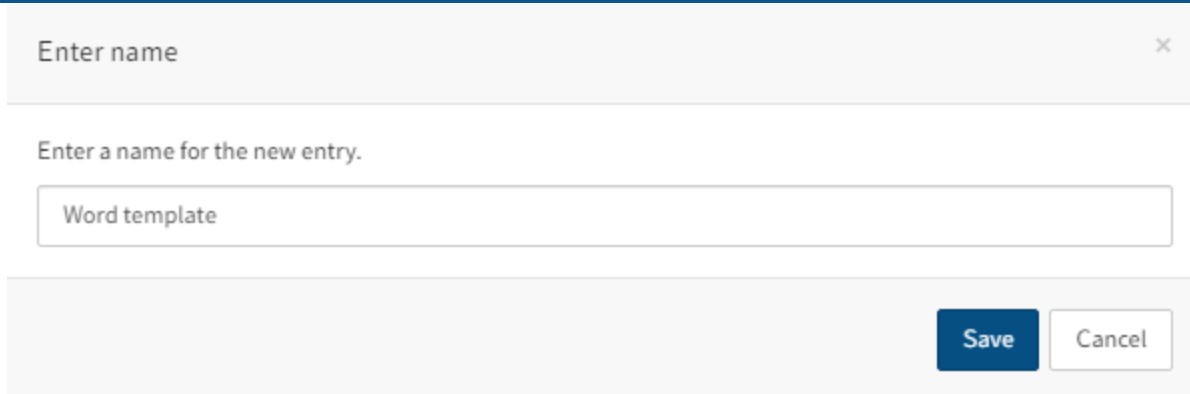
- New customer

- New folder

- Memo

- Word template

3. Select a template, e.g. *Word template*.

Enter name ✕

Enter a name for the new entry.

Word template

Save Cancel

4. In the *Enter name* dialog box, enter a name in the field provided.

5. Click *Save*.

6. Confirm that the website is allowed to open the link.

7. Click *Open link*.

Result

The entry is created in the teamroom. The Word file opens and you can start editing the document.

Outlook

You do not have to check the document back in. Once you save the Word document, the changes are saved in ELO.

Insert file

You can upload a from your file system to a teamroom. There are several templates in ELO Teamroom for this purpose.

Alternative

Drag-and-drop

Method

1. Go to the teamroom that you want to upload a file to.

2. On the ribbon, click the *Insert file* function.

Insert file   ✕

Select a template.

➡ Photo

➡ Text documents

Cancel

The following templates are available in the *Insert file* dialog box:

- ◦ Photo

- ◦ Text document

3. Select a template, e.g. *Text documents*.

Insert file: Text documents   ✕

Short name

Short name

File

Select file   None selected

Version

1

Comment

Comment

Save   Cancel

4. Click the *Select file* button.

Alternative: Drag the file from your file system and drop it on the *Insert file: Text documents* dialog box.

5.

Select the file from the file system.

6. Change the name if required. The name of the selected document is automatically used as the short name.

Optional: Enter a comment in the *Comment* field.

7. Click *Save*.

Result

The file was uploaded to the teamroom.

User menu [your name]

User menu [your name]

Change password

Available in: *User menu [your name] > Change password*

You can change your password as often as you want.

To change your password, you need your old password.

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

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

About
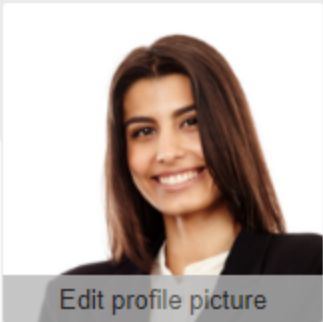
Available in: *User menu [your name] > About*

This is where you will find information about the version of your program. It can be useful to know the exact version when errors occur in your program.

Edit profile

Available in: *User menu [your name] > Edit profile*

Thomson   ×

Emily Thomson
Head of Marketing

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Edit data

Edit profile picture

You can enter information about your position and contact details in your profile.

You can also upload a profile picture.

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

Your profile is visible to other users when they click your name or profile picture in the feed.

Log off

Available in: *User menu [your name] > Log off*

This where you log off from the client.

'Documents' tab

Refresh

The *Refresh* function refreshes your view. The data is read from the repository again.

New entry

The *New entry* function creates a new entry (folder or document) in the teamroom.

For information on how to use this function, refer to the chapter New entry.

Insert file

The *Insert file* function allows you to upload a file from your file system to a teamroom.

For information on how to use this function, refer to the chapter Insert file.

Save as

With the *Save as* function, you can save the selected document to your file system. A window for selecting the location in the file system opens.
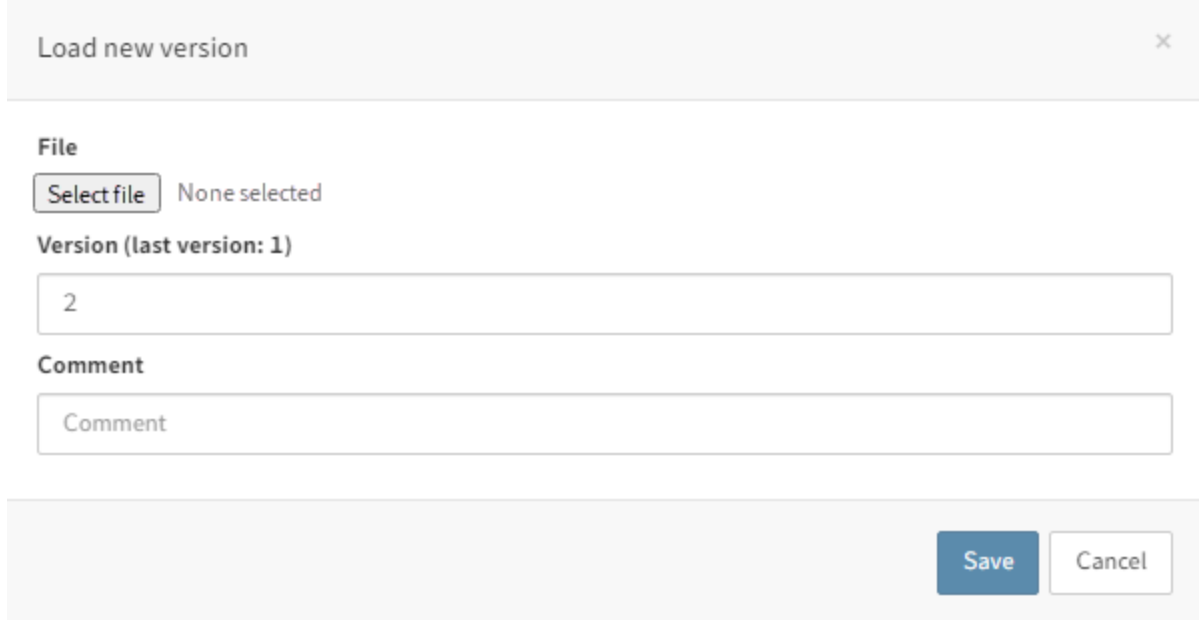
Load new version

The *Load new version* function loads a document from your file system and stores it as a new version of the selected document in the teamroom.

Alternative

Drag-and-drop

Method

1. Select the document you want to upload a new version of.

2. On the ribbon, click the function *Load new version*.

Load new version   ×

File
[Select file] None selected

Version (last version: 1)

    2

Comment

    Comment

                                                        [Save] [Cancel]

The *Load new version* dialog box appears.

3. Click the *Select file* button.

   Alternative: Drag the file from your file system and drop it on the *Load new version* dialog box.

4. Select a file from the file system.

5. Click *Save*.

Result

The version you filed is the new working version.

Edit in Microsoft Office

This function allows you to edit Microsoft Office documents.

Method

1. Select the document you want to edit.

2. On the ribbon, click the function *Edit in Microsoft Office*.

   Information

   Microsoft Office 2010 with Service Pack 1 is required at minimum.

3. Confirm that the website is allowed to open the link.

4. Click *Open link*.

Result

The Microsoft Office document opens.

Outlook

You do not have to check the document back in. Once you save the Microsoft Office document, the changes are saved in ELO.

Move

Use this function to move folders or documents within the teamroom.

Method

1. Select the entry by clicking on the light gray check mark to the left of the icon of the entry you want to move.

2. On the ribbon, click *Documents > Move*.
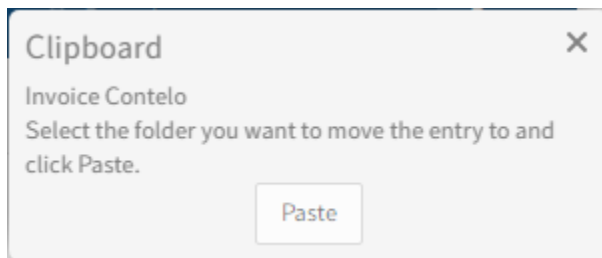
The *Clipboard* dialog box appears.

3. To select a target folder, click the corresponding folder in the teamroom.

If you selected the wrong folder, you can correct this by clicking the right folder. The other folder is selected.

4. In the *Clipboard* dialog box, click *Paste*.

Result

You will now find the entry at the selected new position.

Delete entry

The *Delete entry* function allows you to delete folders and documents.

Whether you can delete folders or documents depends on your permissions.

> **Important**
>
> This function only assigns entries a deletion marker and does not delete them permanently. It is not possible to delete an entry permanently in ELO Teamroom. Deleted entries have to

be removed from ELO permanently by an administrator. They can be restored until the point at which they are permanently deleted.

Method

1. Select the entry by clicking on the light gray check mark to the left of the icon of the entry you want to delete.
2. On the ribbon, click *Documents > Delete entry*.

Result

The entry is no longer shown in ELO. It is assigned a deletion marker until the administrator finally deletes it.

'Members' tab

On the *Members* tab, you can invite new members or guests to join the teamroom or remove them again.

The users have different permissions based on their role. The users can be assigned the following permissions:

- View (R): Users have read access to the entry. They cannot modify the entry.
- Change metadata (W): Users can edit the metadata of the entry.
- Delete (D): Users can delete the entry.
- Edit (E) (documents only): Users can edit the selected entry. This means that they can change the working version and upload a new version.
- Edit list (L) (folders only): Users can change the contents of the folder. For example, you can create documents in this folder or move or remove documents from the folder.
- Change permissions (P): Users can change the permissions for the selected folder.

In ELO Teamroom, the permissions are assigned as follows:

- Moderator (R, W, E, D, L, P)
- Member (R, W, E, L)
- Guest (R)

Invite external users

The function *Invite external users* allows you to invite people without access to your ELO system to join a teamroom.

Method

1. In the teamroom, navigate to the *Members* tab.

2. Click on the function *Invite external users*.

Invite external users   ×

E-mail

E-mail

User name

User name

Email

○ Moderator   ○ Member   ● Guest

Invite user

Close

3. In the *Invite external users* dialog box, enter the e-mail address and user name of the person you want to invite.

4. Select a role and associated rights for the new user: *Moderator*, *Member* or *Guest*.

5. Click *Invite user*.

Result

The person you are inviting will receive an e-mail containing a link to the teamroom and their user name.

Search for user
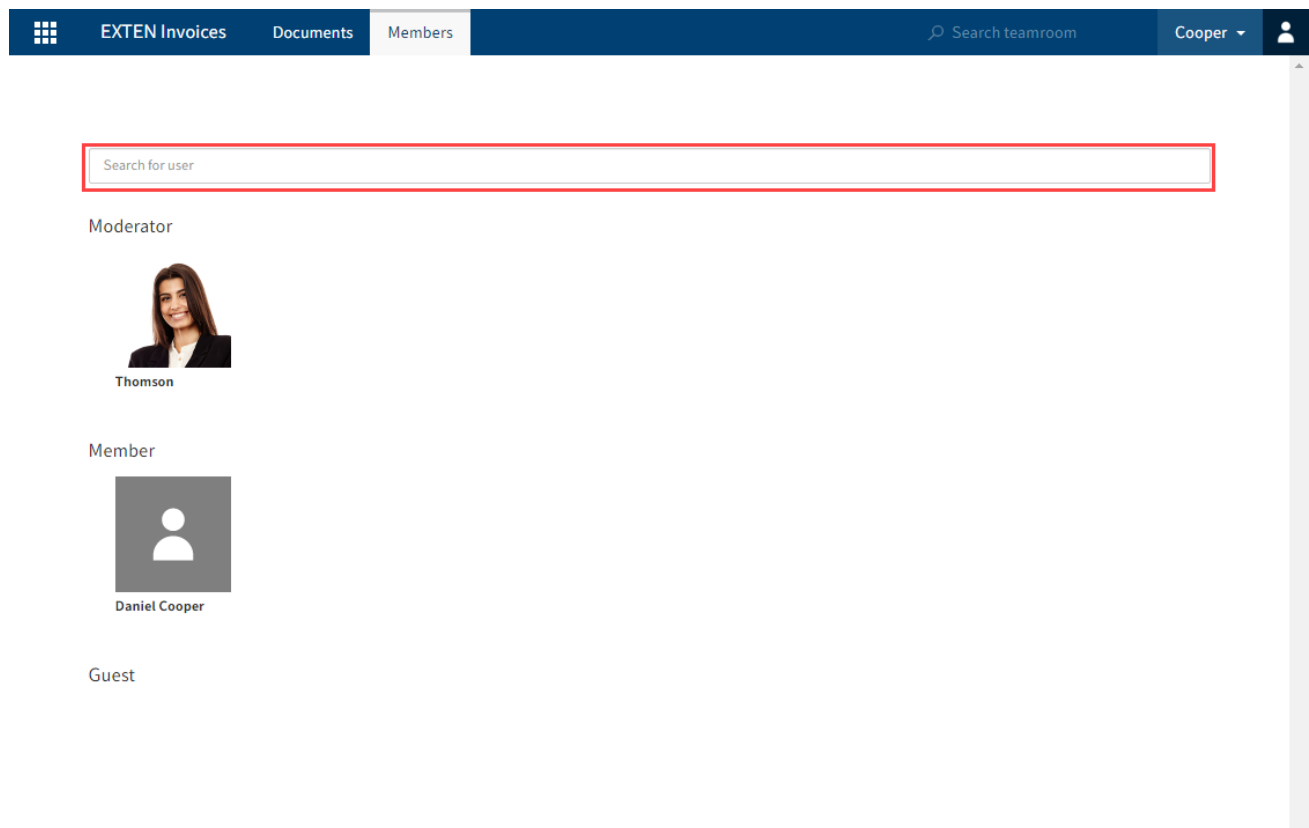
You can search for specific users in the search bar.

Click on the image of the respective user to see information about them.

Add user

A moderator can invite users without access to the ELO system to join the teamroom.

The buttons *Add moderator*, *Add member*, and *Add guest* are available for this purpose.

Method

1. Click one of the buttons, e.g. *Add guest*.

Add guest   ✕

┌───┐
│ | │
└───┘

┌───┐
│ 👤   Peter Parker   ✖ │
└───┘

                                                        OK   Cancel

2. In the *Add guest* dialog box, enter the name of the person you want to add in the top field.

3. Select the person. You can select multiple people.
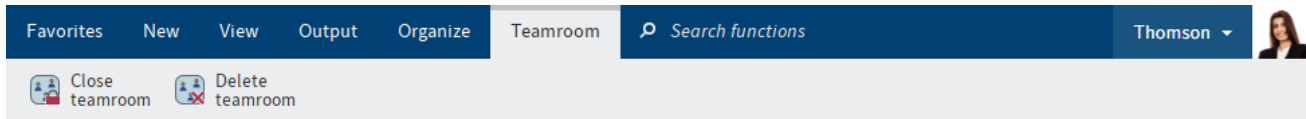
4. Click *OK* to confirm your selection.

Result

The person you are inviting will receive an e-mail containing a link to the teamroom.

'Teamroom' tab

> **Information**
>
> This tab is only available in the main repository.

Close teamroom

When you no longer need the teamroom, you can close it again.

Method

1. In the ELO repository, click on the teamroom that you want to close.

2. On the ribbon, click *Teamroom > Close teamroom*.

3. In the *Close teamroom* dialog box, specify when you want the teamroom to be closed.

You can enter a date and an exact time.

> **Information**
>
> If you specify the current time, the teamroom will remain open for another two hours.
>
> This enables you to notify users that the teamroom will be closing so that they can save their data.

4. Click *OK*.

Result

The teamroom closes at the specified time.

The data for a closed teamroom still exists in both repositories but it is no longer synchronized.

> **Please note**
>
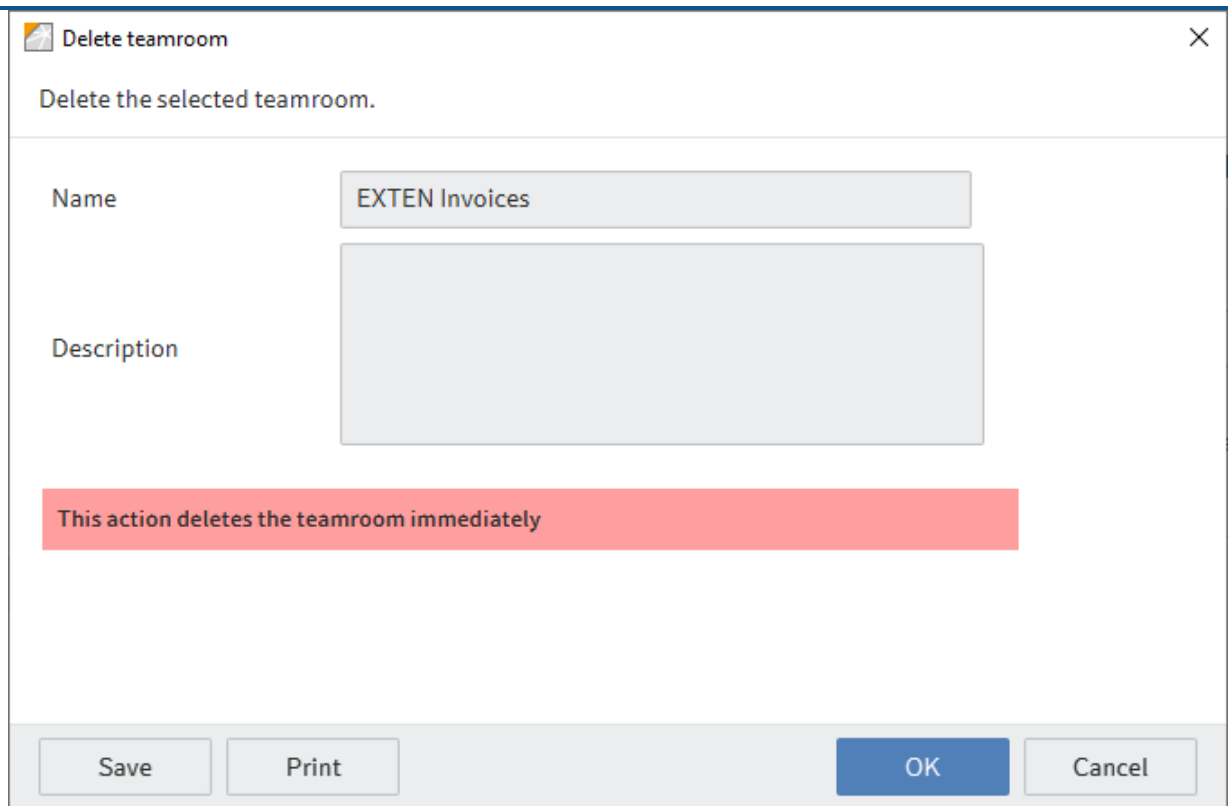> You can no longer view the data using the ELO Teamroom Client.

Delete teamroom

If you have closed a teamroom, you can delete it from the teamroom repository.

> **Important**
>
> The *Delete teamroom* function deletes the teamroom immediately. The data is removed from the teamroom repository. The data is only retained in the main repository.

Method

1. Select the teamroom that you want to delete from the repository.

2. On the ribbon, click *Teamroom > Delete teamroom*.

Delete teamroom ✕

Delete the selected teamroom.

Name   EXTEN Invoices

Description

This action deletes the teamroom immediately

Save   Print   OK   Cancel

3. Click *OK*.

Result

The teamroom is deleted.