ELO Web Client

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Basics

What is the ELO Web Client?

The ELO Web Client provides flexible access to your ELO system. All you need are your logon credentials and the browser URL to access ELO.

Target audience

This documentation is aimed at users without administrator rights. Administrators can use the ELO Web Client Administration documentation.

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

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

Getting started

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

- Important actions in detail: This chapter introduces you to some important features with detailed step-by-step instructions and explanations. With the help of these instructions, you will learn basic actions, which can be applied to most other functions.
- Create view: If you initially want to test a function that does not affect other users, this function is a good choice.
- Program interface, Navigation and use, Important components: These chapters explain the interface and how to use ELO in general. They cover individual topics at a more advanced level.

Structure of the documentation

The goal of this documentation is to explain the functions of the ELO Web Client, as well as the ELO Web Add-ons and the ELO Interface for Microsoft Office Online.

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 program interface and a description of all work areas.

Navigation and use

This chapter provides information about the basics of using ELO.

Important components

This chapter contains a description of important components that you will find in all work areas.

Important actions in detail

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

Functions

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

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

want to personalize ELO?

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- Change tile settings and pin tiles to the navigation bar
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- Workflow overview
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- Dynamic folder

want to output information from ELO?

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- Send document (ELO Web Add-ons)
- Save as
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- Export table

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- 'Search' work area
- Search entries
- Search with ELO Click OCR
- Search metadata

want to structure the repository area?

-

Move
- Reference
- Drag-and-drop
- Copy
- Link

Start ELO

Method

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

   The logon dialog box opens.

2. Enter your ELO user name and password. If you have been given a temporary password for your first log on, change it during the first session using the Change password function.

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

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

Result

ELO opens in the language configured in the browser settings.

New features

Version 23.6

- The AI assistant lets you analyze and edit recognized document content or use it in ELO using artificial intelligence.

Workspaces

- Filter menus can be opened and closed.
- 'Reset filters' button: If filters are set, a button for resetting all filters appears in the toolbar.
- Color status in Kanban boards: If colors have been assigned to the corresponding keyword list entries, these are visualized on Kanban boards.
- Status and quick filters also remain active in other filter levels after restarting ELO as well as in other ELO clients.

Version 23.5

- The Clipboard can be synchronized across several clients.
- New logon dialog box with ELO Modern Authentication: Logon is also possible using a Microsoft account, provided the administrator has set up this option.
- Functional roles are no longer requested by default during logon. However, they can still be enabled via the Enable roles function.

Workspaces

- Separate functions for creating business objects: Instead of the previous *New object* function, there is now a separate function for every metadata form that is permitted in the workspace. The names and tooltips for the functions can be defined in the workspace configuration.
- Role-independent creation of business objects: You can configure which actions and functions may be used by individual roles. Example: The *Member* role can only use the *New application* function, but not *New contract*.
- The workspace configuration is now divided into tabs (*Basic settings*, *Metadata forms*, *Views*, and *Filter trees*).

Version 23.4

- File multiple entries: When selecting a folder, all child folders and the documents they contain are automatically filed to the repository.
- It is possible to search via business objects (regions).

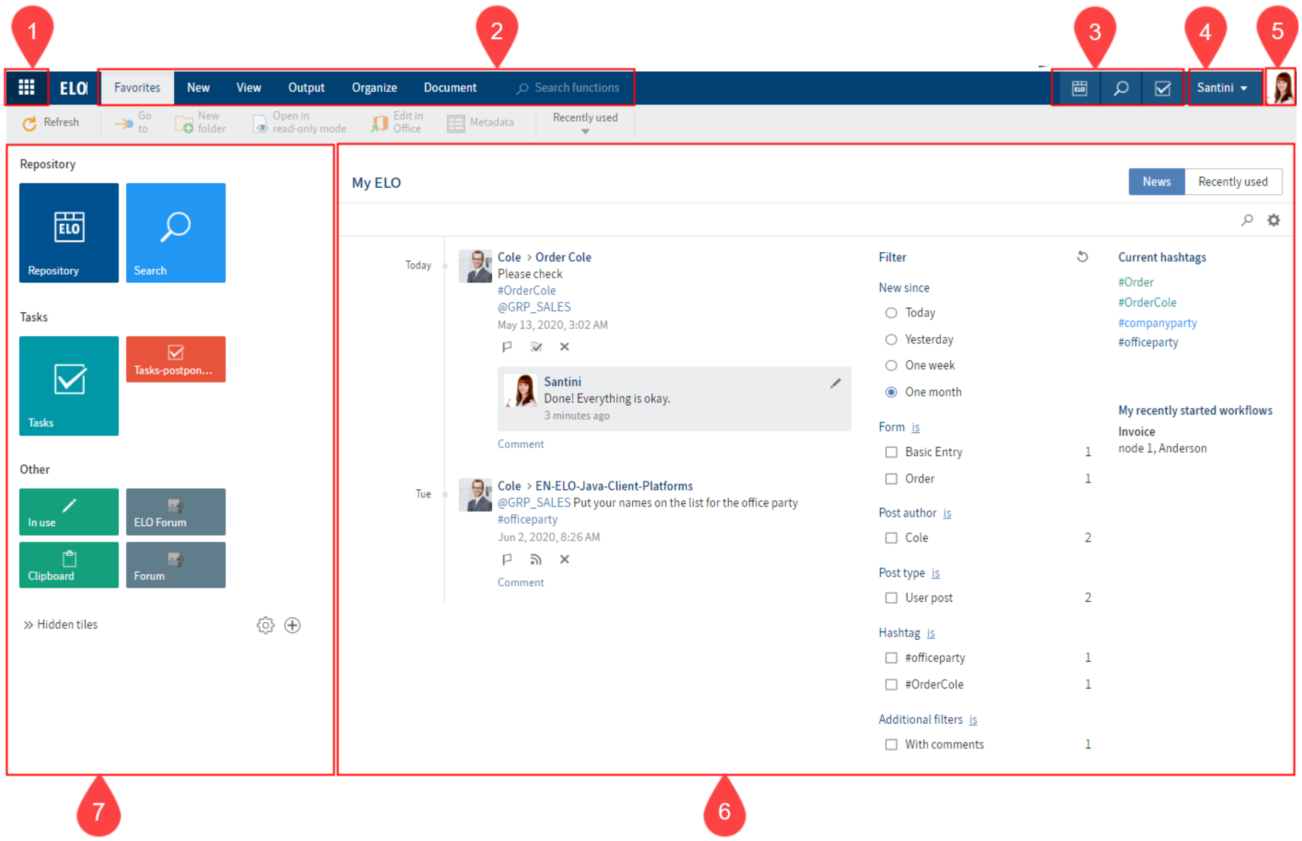
Workspaces

- Flyouts: Flyouts are used in tables to show whether there are one or more relations on an entry. If there are multiple relations on an entry, the flyout shows the available relations in a drop-down menu. They are disabled by default in the workspace configuration. If the flyouts have been enabled, they are only shown in the workspace instance if there is at least one relation for the corresponding entries.

- Extended calendar view: In the calendar view, you can configure different/multiple date fields in different colors. This simplifies how information is presented and creates an overview without the user having to switch views.
- Quick filters: Quick filters are available above the table. They are a quick and simple method for filtering the data shown by specific criteria. Pre-defined options are possible. Quick filters can also be used in the calendar and dashboard view.
- Auto-refresh: When metadata is changed in the client, the tables, the kanban board, or the calendar for an object are refreshed automatically. The user no longer has to refresh manually and the context is retained.

Program interface

This chapter contains basic information on the ELO Web Client interface to help you get familiar with the program.



The 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 respective work areas.

3 Navigation bar: Navigate between the work areas using the navigation bar.

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

5 Profile: In your profile, you can enter information and upload a profile picture.

6 News/Most recently used: This area is split up into *News* and *Most recently used*. The *News* tab helps you keep track of changes in ELO. You will find your most recently used entries on the *Most recently used* tab.

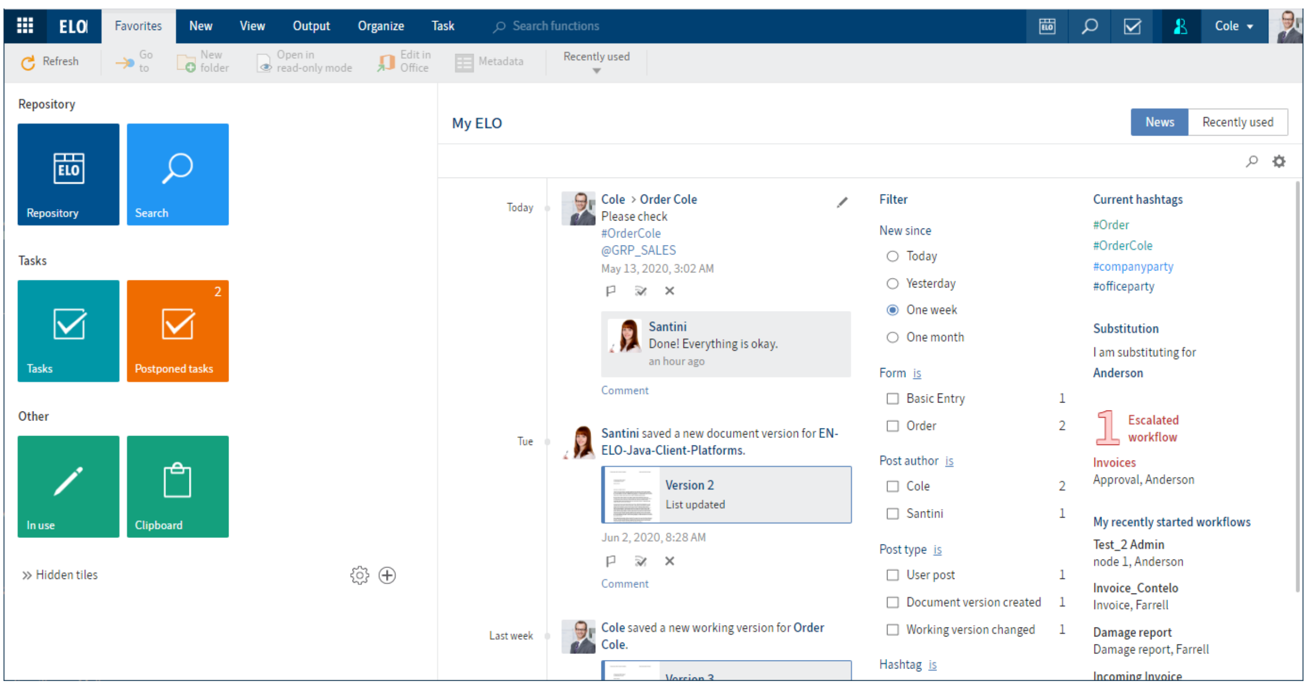
7 Tile navigation: This area is for navigating the program.

What is a work area?

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

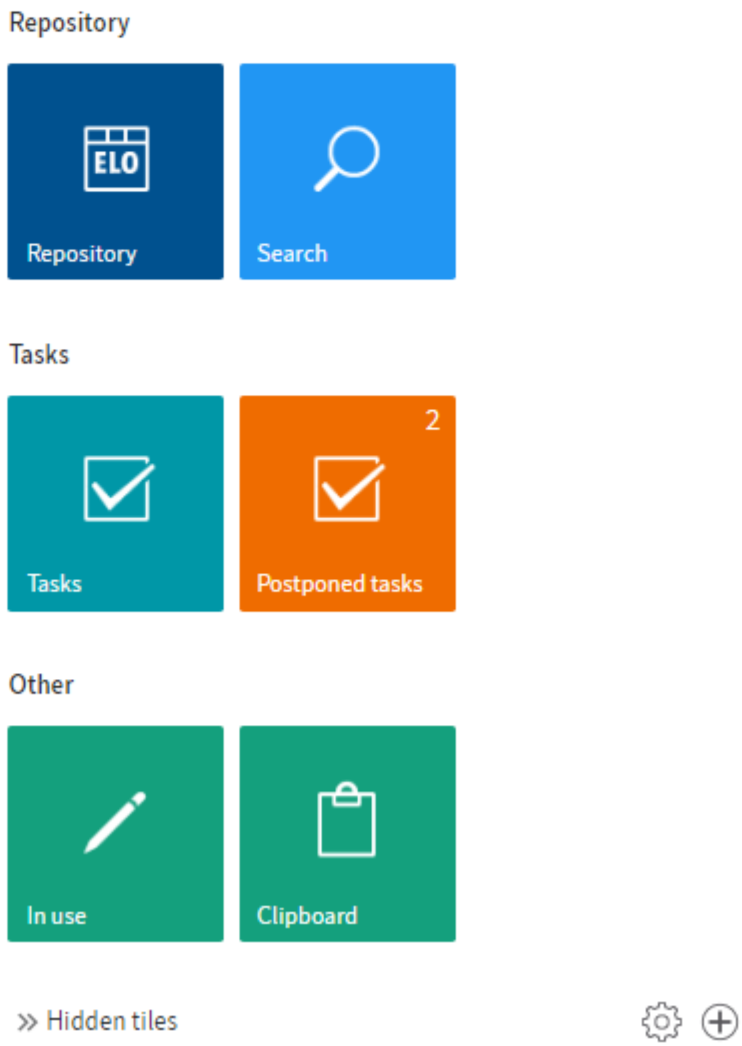
- My ELO: This work area is on the home screen when you start the program. Tiles on the left-hand side provide access to the main areas in ELO.
- Repository: This area contains all folders and documents that you are authorized to access. This is also where you create additional folders and documents.
- Search: This area is where you search for folders and documents that are stored in the *Repository* work area.
- Tasks: If you are assigned tasks, you will find them here. Tasks are always related to folders or documents in the *Repository* work area.
- Clipboard: You can copy frequently used folders and documents from the *Repository* work area to the Clipboard. This enables you to quickly find the entries you need frequently or are currently working on.
- In use: When you edit a document, it automatically appears in the *In use* work area. Editing a document means that you have checked it out.

'My ELO' work area



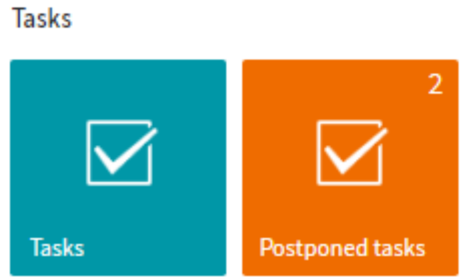
The *My ELO* work area is on the home screen when you open ELO. Tiles on the left-hand side provide access to the main areas in ELO.

Tile navigation



The tile navigation contains all available tiles. Tiles can be used to represent work areas, folder views, task views, search favorites, spaces and ELO apps. The following tiles are shown by default:

- ELO (or the name of your repository; this is the *Repository* work area)
- Search
- Tasks
- In use
- Clipboard

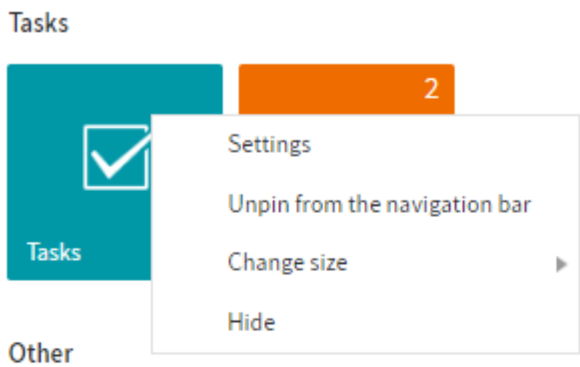


Tiles are organized into groups.

Edit via the context menu

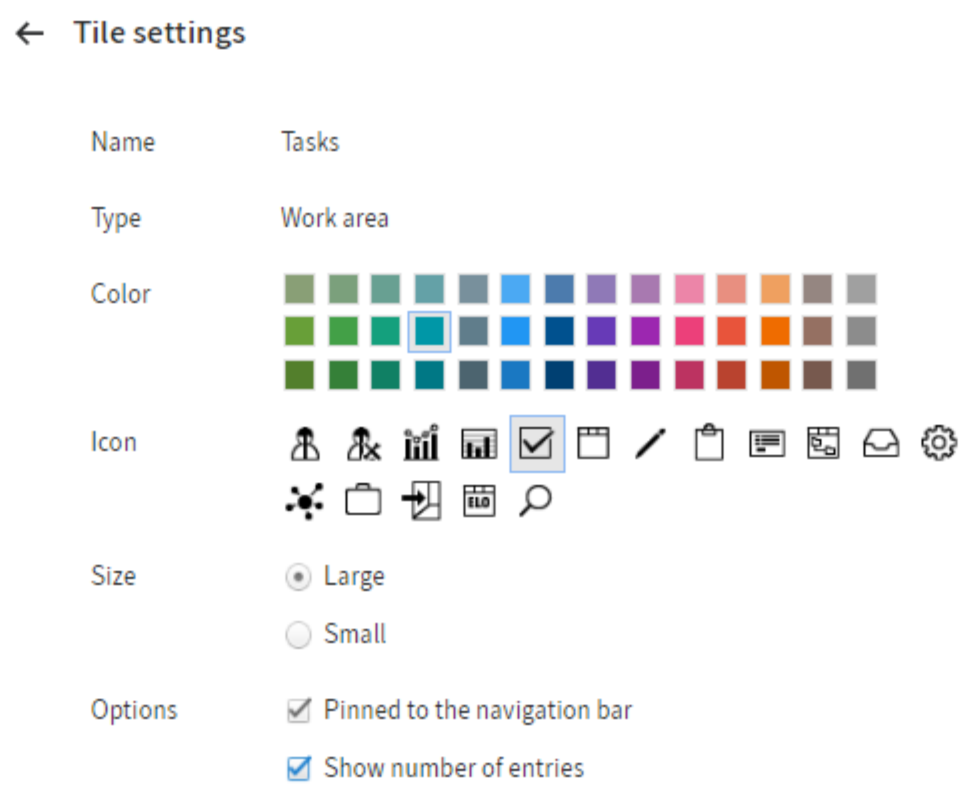
Each tile has a context menu that is opened by right-clicking the tile.

You can make the following tile settings within the tile's context menu.



- Pin to the navigation bar or Unpin from the navigation bar: This function places the tile on the navigation bar or removes it. Pinning tiles makes it easier for you to switch between the work areas.
- Change size
- Hide: When you hide tiles, they are moved to the *Hidden tiles* area. To restore hidden tiles, drag them to the place you want in the tile navigation.

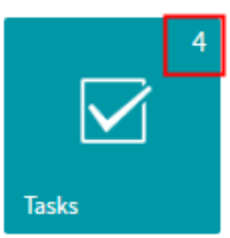
Change tile settings



Right-clicking a tile and selecting *Settings* opens the settings for the selected tile. You can change the color, the icon, and the size of the tile.

You can also enable the following options:

- Pinned to the navigation bar: This function places the tile on the navigation bar or removes it. Pinning tiles makes it easier for you to switch between the work areas.



- Show number of entries: If this option is enabled, the tile shows the number of direct child entries in the work area. If you enable this option for the *Repository* work area, for example, only the top folder level will be shown, and not all the entries it contains. This option is particularly useful in the *Tasks* work area. If the number next to the *Tasks* work area is green, you have at least one new task.

The changes are saved automatically.

Close the tile settings by clicking the selected tile or the button with the left arrow.

You can open the tile settings for another tile by clicking the other tile.

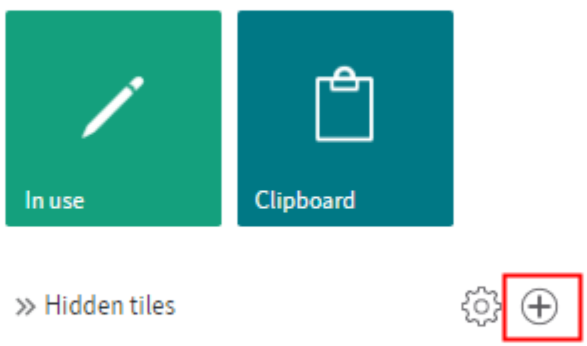
Create tiles

You can create tiles for quick access to folders, tasks, and searches.

Create group

To sort your tiles by topic, you can create groups.

Method



Right-click a group name or click the plus icon to create a new group.

Outlook

- To change the position of a group, click the group name and drag the group to the place you want it holding down the left mouse button.
- Right-click a group name to change the name of the group or delete the group via the context menu. If you delete a group, the tiles in the group are moved to the *Hidden tiles* group. You can move groups around in the tile navigation with drag-and-drop.

> **Information**
>
> The names of standard ELO groups cannot be changed.

News

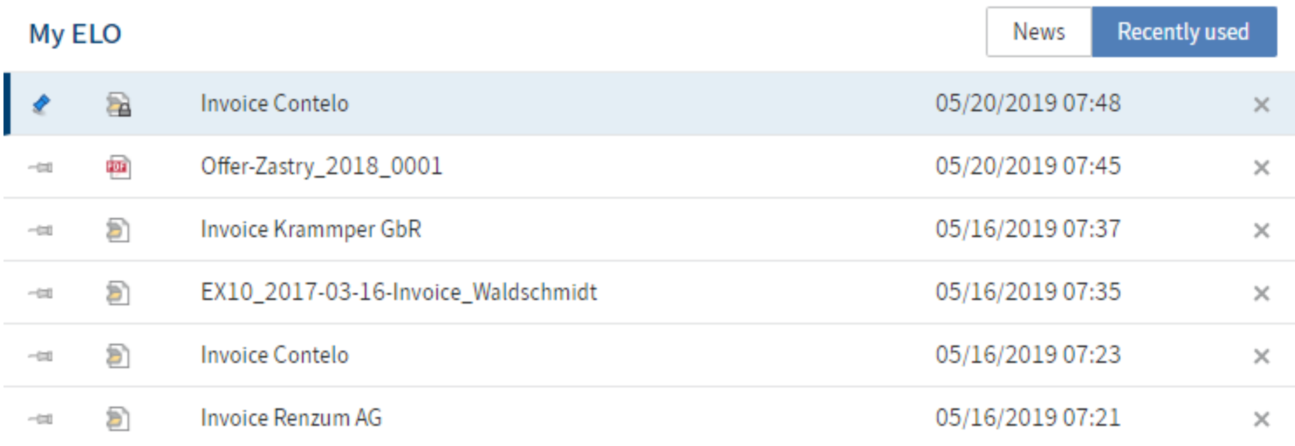
The *News* tab helps you keep track of changes in ELO.

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. In addition, a hashtag cloud, escalated workflows, and recently started workflows that are relevant for you are shown in this work area.

Information

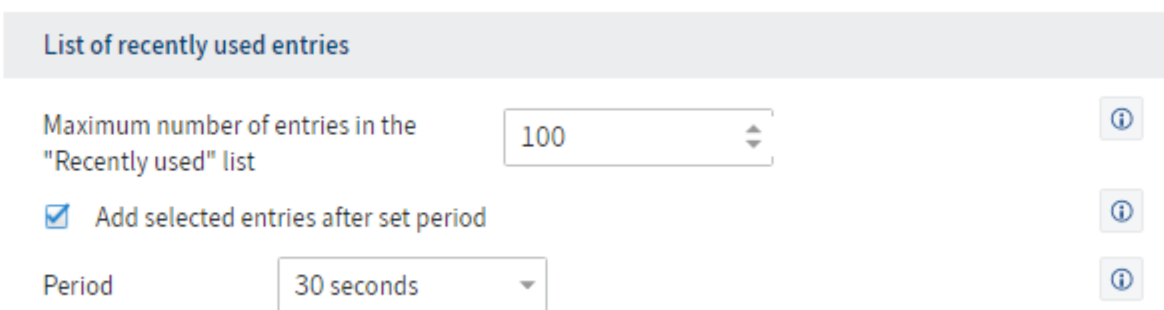
Most functions in the *My ELO* work area are feed functions. For more information, refer to the chapter Feed.

Most recently used



The *Most recently used* area contains a list of documents that you recently viewed or edited.

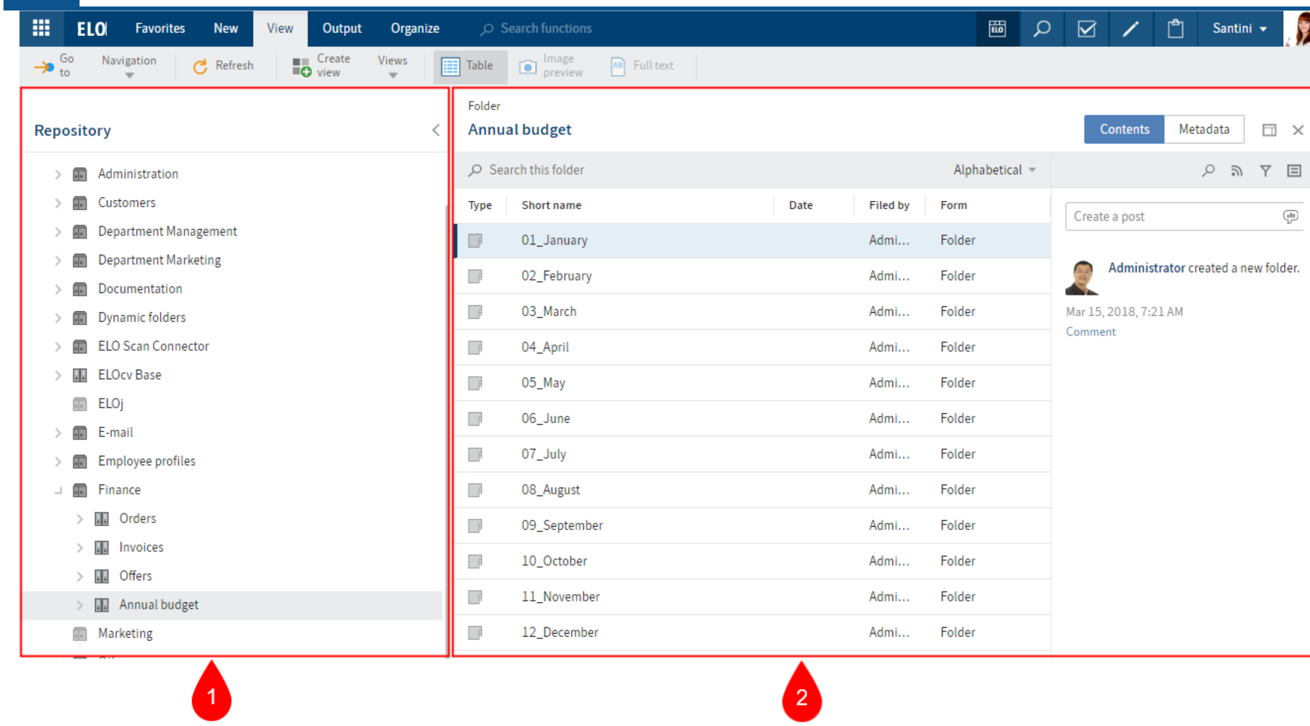
You can pin entries you need regularly by clicking the pin icon.



Under *User menu [your name] > Configuration > Display > List of recently used entries*, you can configure how many entries the list should contain and when a selected entry should be added.

'Repository' work area

You will find all folders and documents created in ELO in the *Repository* work area.



The work area is divided into the:

1 Repository structure: Overview of folders and documents

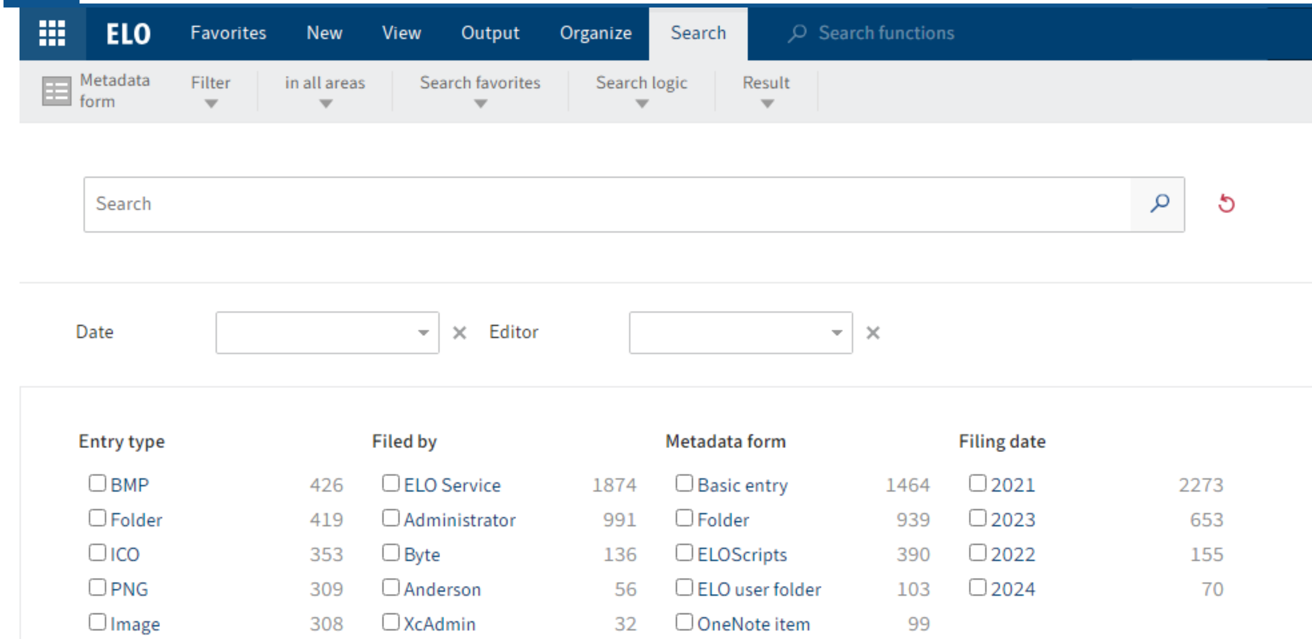
2 Viewer pane: View of folders or documents selected in the tree

For a detailed description of each component, refer to the Important components chapter.

'Search' work area

In the *Search* work area, you can search through folders and documents in the *Repository* work area.

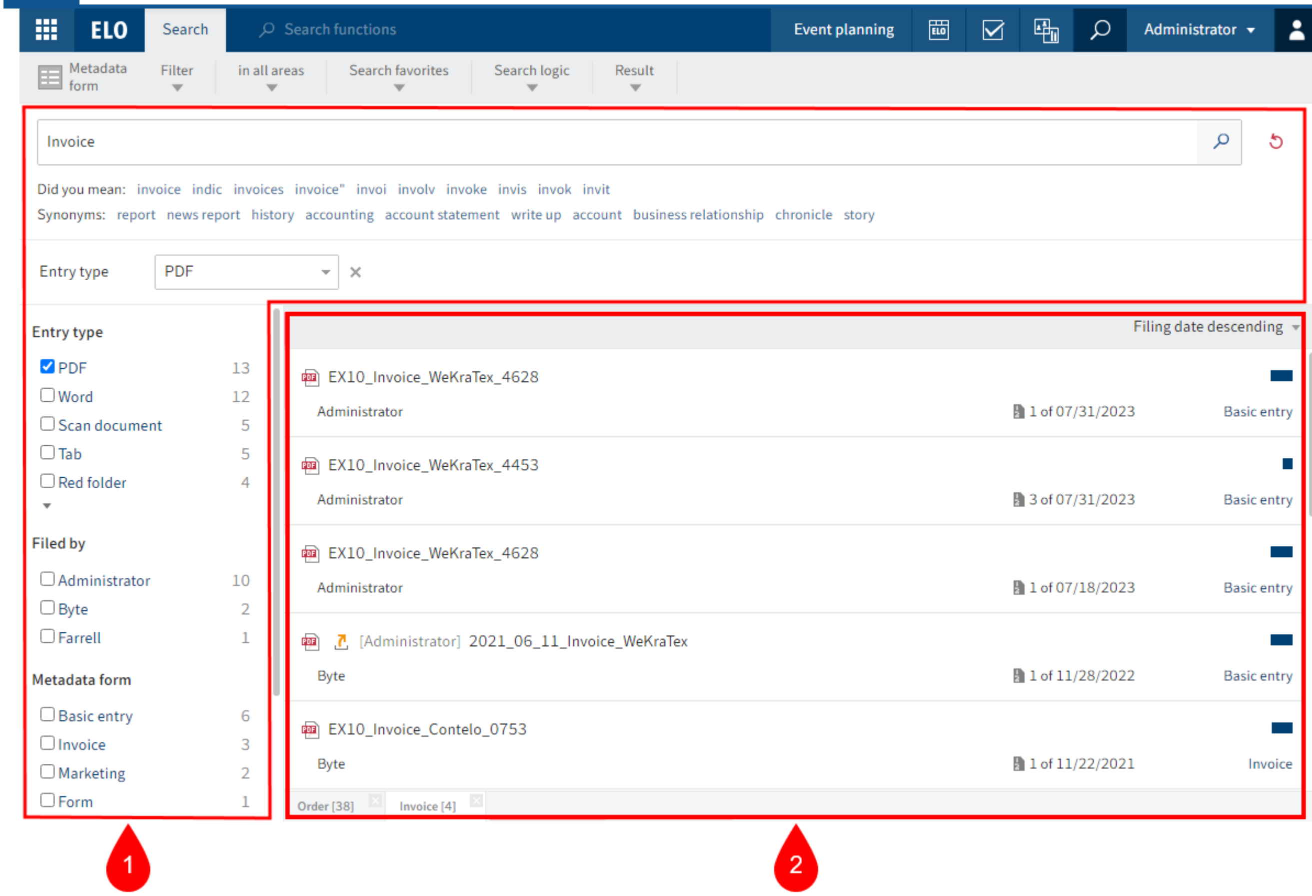
Various filters are available. For searches you need regularly, you can create favorites, which enable fast searches in the tile navigation area next to *My ELO*.



When you open the *Search* work area, the *Search* tab appears. Using the functions on the *Search* tab, you can narrow down and continue your search.

The chapters 'Search' tab and Search entries explain each of the search elements and how to perform a search.

After a search, the work area is divided into the following:



1 Search elements: Elements for narrowing down your search

2 Results: Results of your search in list form

Search elements

Search elements help you narrow down your search.

Input

Enter one or more search terms into the input field.

As soon as you type the first letters of the search term, ELO iSearch provides you with relevant suggestions. If you enter additional letters, ELO iSearch updates the suggestions accordingly.

Clicking one of the suggestions applies it to the search field.

> **Information**
>
> You will find tips for entering search terms by selecting *Tips for using ELO iSearch*.

AND search: If you enter two terms into the search field, the system will search for entries that contain both terms.

OR search: If you enter two terms into the search field and separate them with a comma (e. g., `order, invoice`), the system searches for entries that include at least one of the terms.

Exclude term: To exclude a term from your search, enter it in the search field and put a minus sign in front of the term. For example, a search for `-document` excludes entries that contain the term *document*. You can combine the negated term with other terms that you do not negate.

Phrase search: To search for multiple related terms, enter the terms in the search field with quotation marks, e.g., `social media`. Only entries that contain all the terms in the order entered will be found.

> **Please note**
>
> If you search for `NOT`, `OR`, or `AND` via the search field or filters, you may encounter issues during your search.

Narrow down search

The following options are available for narrowing down your search:

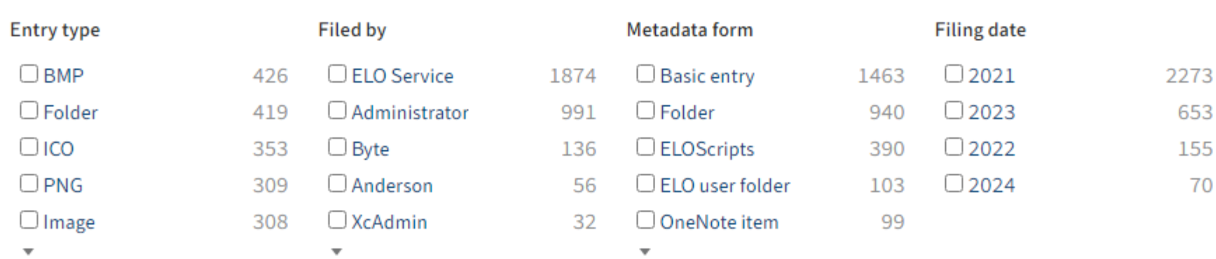
- Areas
- Folders
- Filters or facets

Use facets

Filters and facets allow you to narrow down your search using metadata, such as the filing date.

Filters and facets work in the same way. The only difference is how they are selected.

To learn how to select a filter, refer to the Filters chapter.



To select a facet, select the facet specification. You can also select multiple facets in this way.

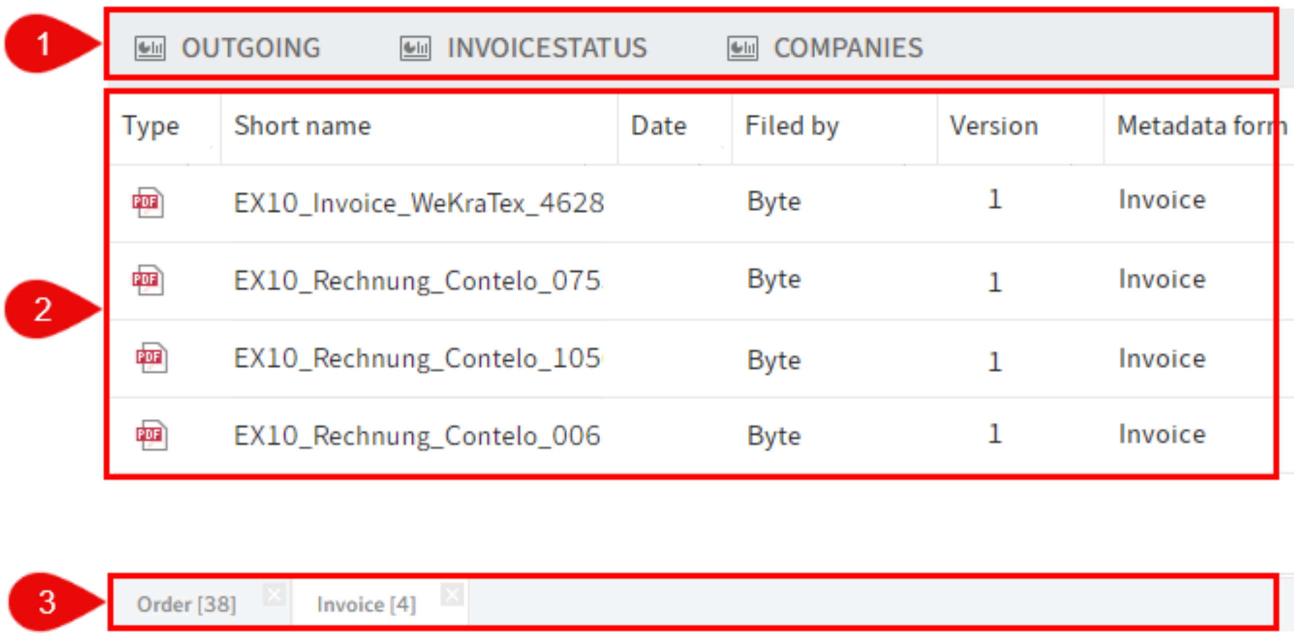
Negate facets

You can apply reverse facets. For example, if you select a user and set the filter to *is not*, only entries that were not processed by this editor are shown. It is not possible to only negate individual filters or facets.

To negate a facet, select the facet.

Results

The results field consists of the following elements:



1 Dashboards

After conducting a search with a form filter, buttons are available that allow you to launch dashboards. These buttons are only displayed if dashboards have been stored for the corresponding metadata form.

Dashboards are created by the administrator. They can only be created with generation 2 metadata.

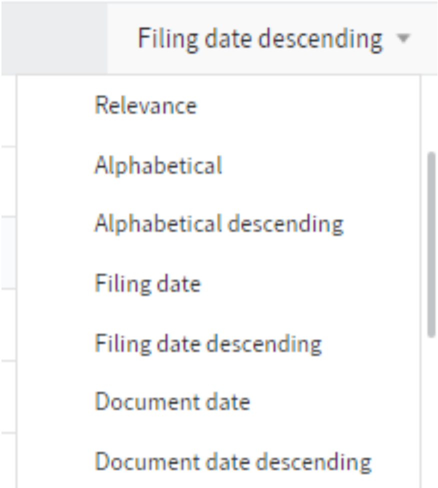
The dashboards allow you to visualize metadata of entries filed with the same metadata form in different ways. You can use bar charts, line charts, doughnut charts, and key figures.

You can move the mouse over the dashboards to view details about them.

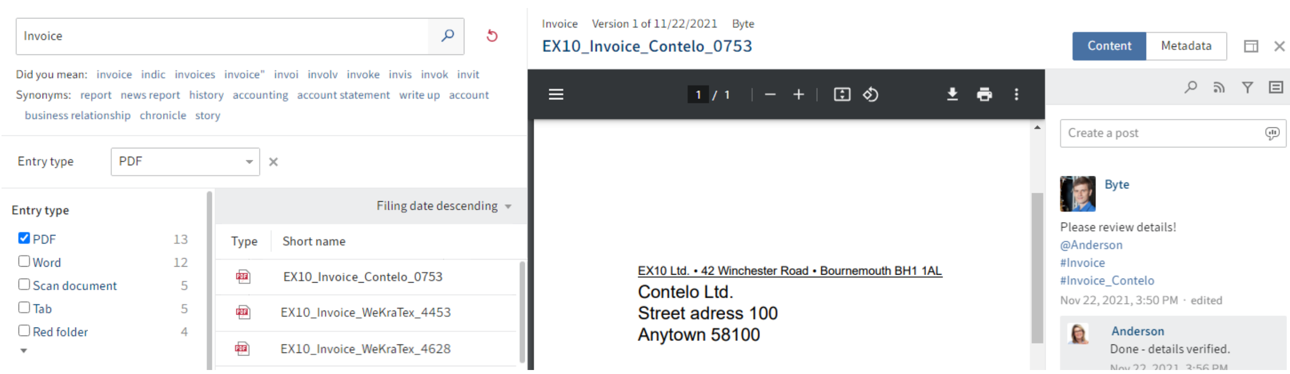
2 Results of the current search

The results of the current search are shown as a list.

If you need more information on the individual entries, switch to the table view (*Ribbon > View > Table*). To switch back to the list view, select the *Table* button again.



For a better overview, you can sort the results according to your requirements.



Select an entry to view its contents.

Use the X icon in the top right-hand corner to close the view.

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

Type	Short name	Date	Filed by	Form	Filing date	Hits
PDF	Invoice_Contelo	09/14/...	Admi...	Basic entry	09/27/...	Short name
PDF	Invoice Smith	09/14/...	Admi...	Basic entry	09/27/...	Short name
PDF	EX10_03/11/2019_Invoice_Contelo	09/14/...	Admi...	Basic entry	09/27/...	Short name
W	Test document	03/17/...	Admi...	Basic entry	09/27/...	Field
W	EX10_2020_Meeting minutes	03/17/...	Admi...	Basic entry	09/27/...	Field
W	EX10_2020_Invoice_Contelo	03/17/...	Admi...	Basic entry	09/27/...	Field, Short ...

Hits: You can also see where the search was found (short name, full text ...). You need to enable this option in the configuration (User menu [your name] > Configuration > Search > Show results text or hits > Hits).

Results text: You can also display the results text. You need to enable this option in the configuration (User menu [your name] > Configuration > Search > Show results text or hits > Results text).

Reset search: Restores the search settings to default values. You can set the default as follows: Narrow down your search using areas and filters/facets. On the ribbon, select *Search > Filter > Set as default*.

3 Search views

The last search queries are displayed as a search view in a bar below the results list of the current search.

A search view is used to temporarily save search results and search settings. Metadata searches are automatically saved as a temporary search view.

Selecting the corresponding search view automatically runs the search. You can delete a search view with the X icon.

> **Please note**
>
> These search views are deleted when you close ELO. If you want to save a search request, use the Add favorite function (*Search work area > Ribbon > Search > Search favorites*).

Outlook

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

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

You can create favorites and dynamic folders, which work with custom searches.

'Tasks' work area

In the *Tasks* work area, you will find a list of your tasks.

To learn how to edit tasks, refer to the 'Task' tab chapter.

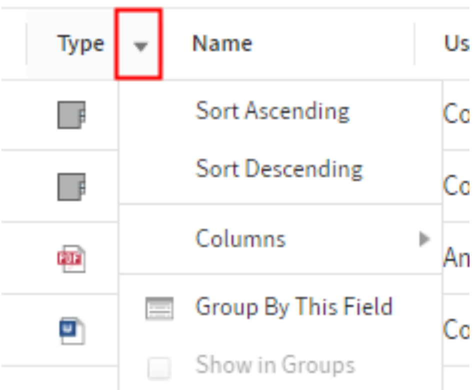
The following types of tasks are available; you can distinguish them by their icon.

Workflows	Workflow icon	

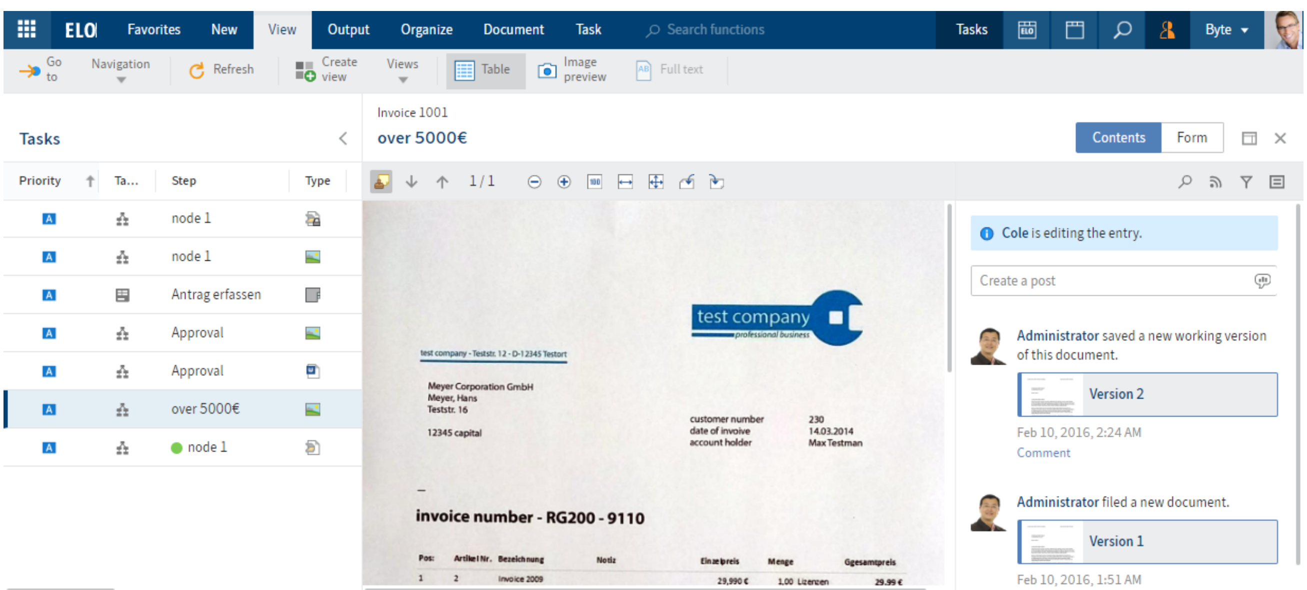
Reminders	Calendar icon	
Monitoring entries	Camera icon	

New entries are shown with a green dot.

If you need more information on the individual entries, switch to the table view (*Ribbon > View > Table*). To switch back to the list view, select the *Table* button again.



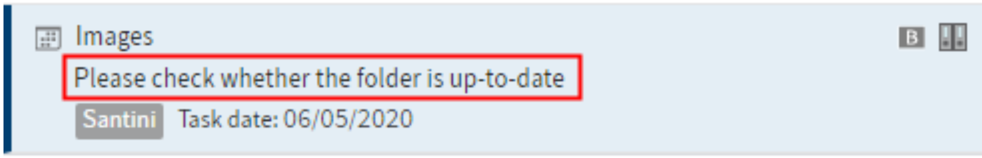
For a better overview, you can sort the tasks according to your requirements.



Select an entry to view its contents.

Use the X icon in the top right-hand corner to close the view.

The job instruction tells you what the task is.



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

- Workflows: Actively: You forward the workflow using the form (*Form* tab), delegate it, or hand it off. Passively: A group workflow is accepted by another member of the group.
- Reminders and monitoring: You delete the entry (*Ribbon > Organize > Delete*).

Edit workflow with a form

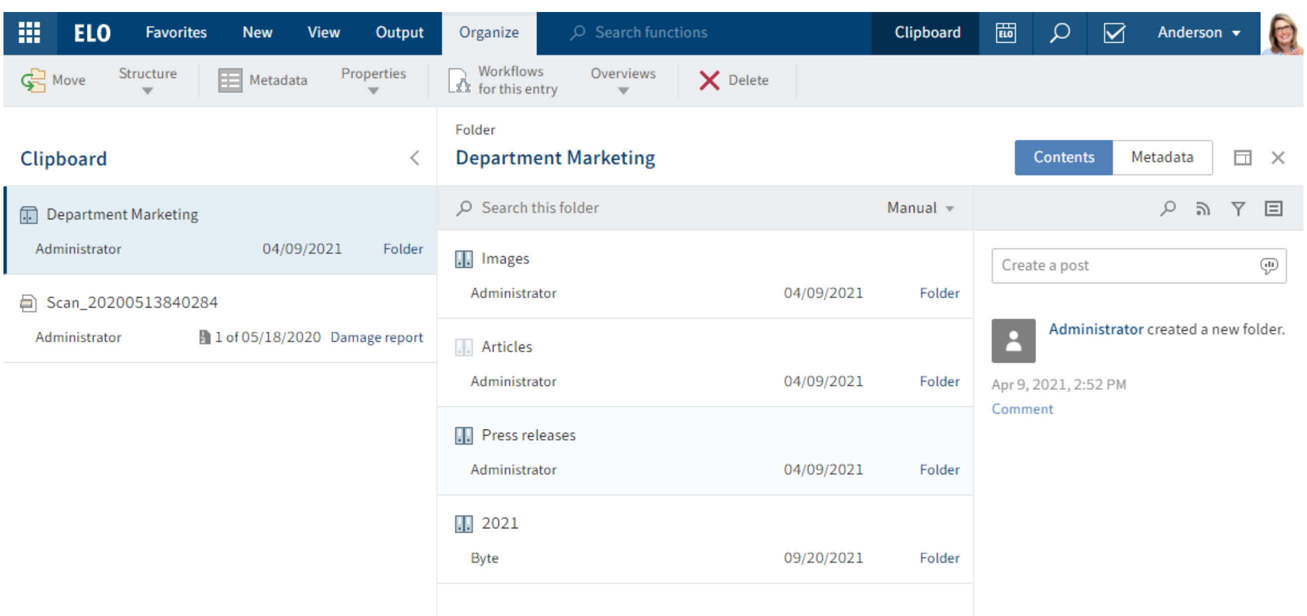
For workflows with forms, you will find the form on the *Form* tab. You can edit and forward it here.

Method

1. Edit the fields of the form as indicated in the task.
2. To forward the workflow after editing the form, select the corresponding button within the form.

> **Information**
>
> If no form is available for a workflow step, you will need the Forward dialog box to process it. To open this dialog box, select the *Forward workflow* button.

'Clipboard' work area



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

To place an entry on the Clipboard, select it and, on the ribbon, select *View > Copy to Clipboard*.

You can edit entries on the Clipboard in the same way as entries in the *Repository* work area. The changes are applied to the *Repository* work area.

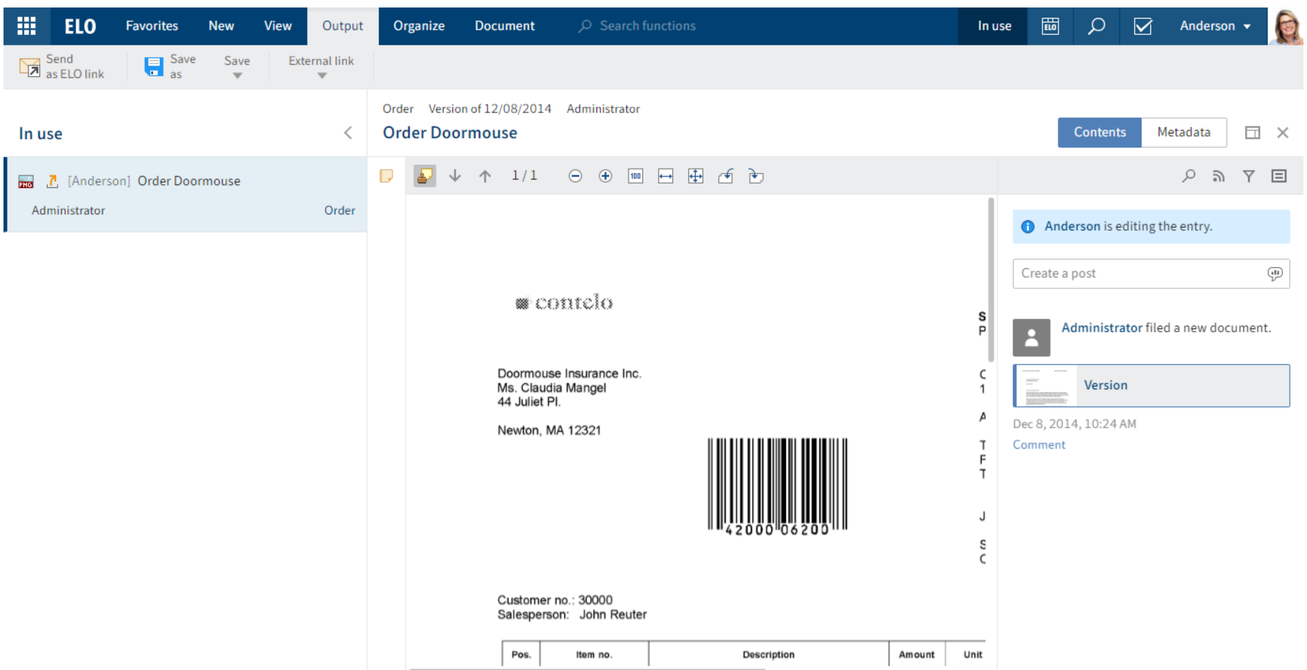
Navigation and display are the same as in the *Repository* work area.

For a detailed description of each component, refer to the Important components chapter.

An entry remains in the *Clipboard* work area until you remove it (*Ribbon > View > Remove from Clipboard*).

> **Information**
>
> If you use additional ELO clients, the Clipboards are synchronized. Switching between the individual clients, you will always find the same entries.

'In use' work area



The *In use* work area shows you all the documents you have checked out for editing. The chapter Check out and edit document explains how to check out and edit documents.

Navigation and display are the same as in the *Repository* work area.

For a detailed description of each component, refer to the Important components chapter.

Once you check in the document or cancel editing, it automatically disappears from the *In use* work area.

Spaces

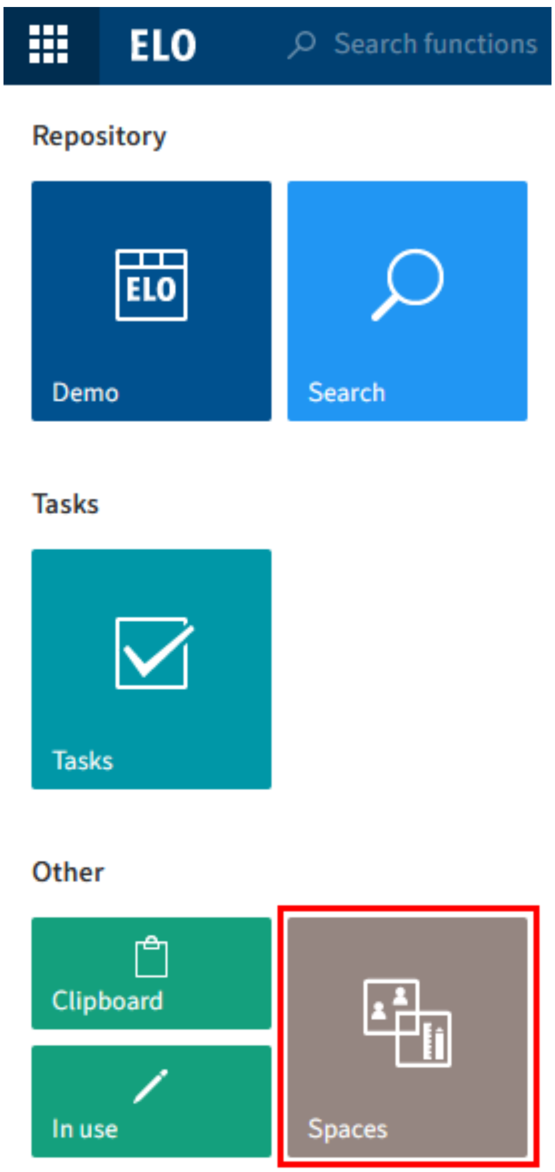
Spaces are areas where you can collaborate with other users. You can file new entries and work on them with members of the space.

Workspaces are workspaces in ELO for different functional levels. With the help of filters and different views, you can edit data and analyze it in charts and tables.

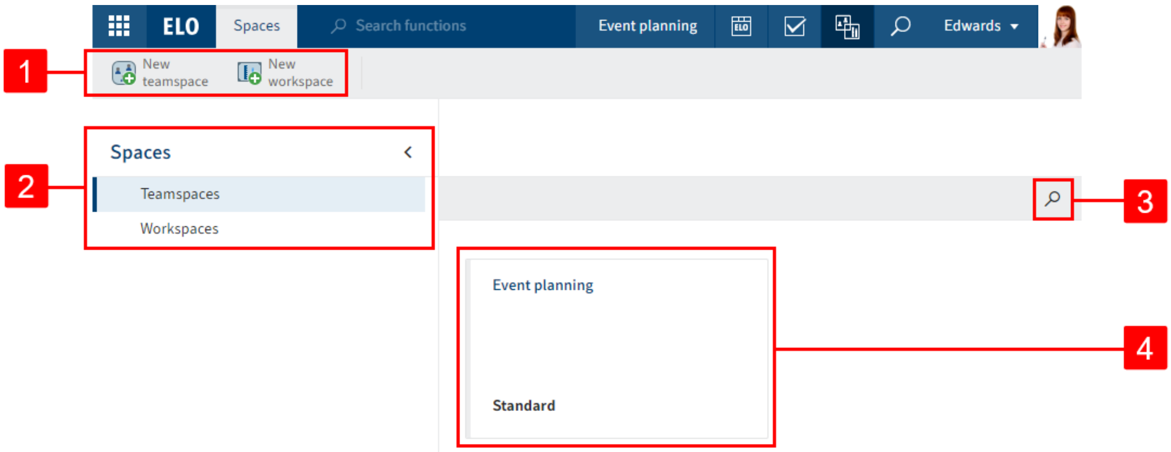
The *Teamspace* function enables you to collaborate across teams. All teamspace members can gather and edit documents together and exchange information using the feed.

For more information, refer to the Workspaces and Teamspaces chapters.

This section explains how you can access spaces.



You can find the spaces in the *My ELO* work area via the *Spaces* tile. In this area, you see all spaces that you are a member of.



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

You have the following options:

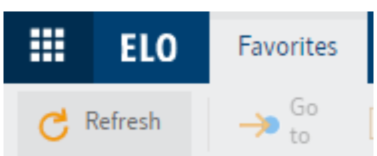
1 Create a new teamspace or workspace: If these buttons are disabled, there are no teamspace templates or workspace types available for creating new spaces.

2 Switch between teamspaces and workspaces

3 Search for teamspaces or workspaces: The number of tiles decreases in accordance with your search query.

4 Navigate to a teamspace or workspace: They are shown as tiles and sorted by creation date.

'My ELO' button



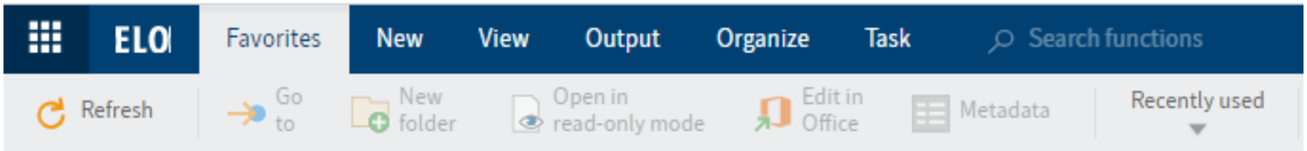
Use the *My ELO* button to open the 'My ELO' work area. The *My ELO* work area is on the home screen when you open ELO.

Alternative: Use the CTRL + WINDOWS keyboard shortcut to open your *My ELO* start screen.

This area contains your news and most recently used entries, as well as the tile navigation.

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

Ribbon



You can launch functions from the ribbon.

The ribbon provides access to most functions in ELO.

> **Information**
>
> Some functions can also be run from the context menu. Right-click an entry in ELO to open the context menu.

Tabs: The ribbon is organized into tabs. Some tabs are always shown (default tabs), while others only appear when the tab functions can be used (contextual tabs).

The default tabs are:

- Favorites: With the default settings, this tab contains several important functions. You can add other functions.
- New
- View
- Output
- Organize
- Task

The contextual tabs are:

- Document: This tab appears when you select a document.
- Search: This tab appears when you select the *Search* work area.
- Clipboard: This tab opens when copying, referencing, or moving entries.

Functions: The functions are arranged logically by relation. The most important functions are pinned to the ribbon. Others can be found in drop-down menus. If a function is grayed out, you cannot use it at your current position in ELO.

Search functions: You can search for functions using the search field. Selecting a function in the results list executes the function.

You can customize your ribbon so that you can find the functions you need quickly in the following ways:

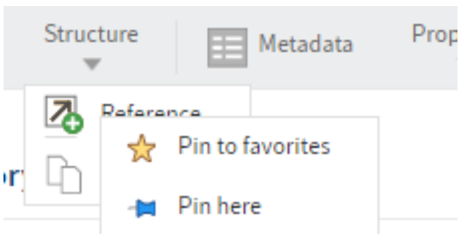
- Pin function to ribbon and remove from ribbon
- Only show icon on function buttons

Pin function

Many functions can be found in drop-down menus as standard. You can pin functions from the drop-down menu you need more frequently to the ribbon. You can pin functions to the respective tab or to the *Favorites* tab.

Method

1. Open the drop-down menu containing the function.



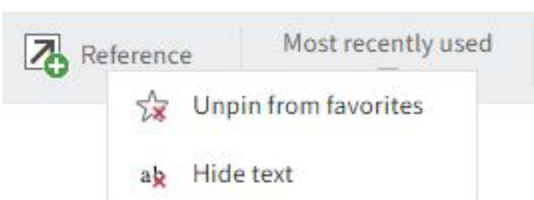
2. Right-click the function that you want to pin.

- Pin to favorites: The function is pinned to the *Favorites* tab. You can save the functions you use most frequently to the *Favorites* tab. This function can also be found in the drop-down menu you pinned it from.
- Pin here: The function is pinned to the tab you currently have open. This function can no longer be found in the drop-down menu you pinned it from.

Remove function from ribbon

You can also remove pinned functions from the ribbon.

Method



'Favorites' tab: Right-clicking the function and selecting *Unpin from favorites* removes the function from the *Favorites* tab.

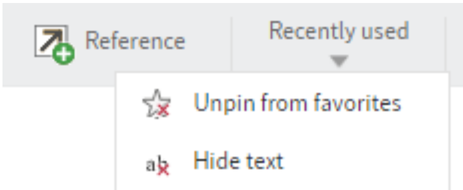
Additional tabs: Right-clicking the function and selecting *Unpin from here* returns the function to the drop-down menu.

Hide function text

If the icon for a function is enough for you, you can hide the text. This only works for functions pinned to the ribbon.

Method

1. Right-click the function.



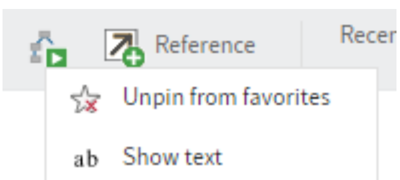
2. Select *Hide text*.

Show function text

You can disable the option to hide the text.

Method

1. Right-click the function.



2. Select *Show text*.

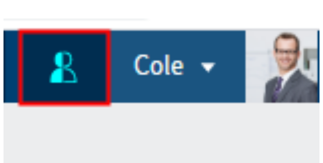
Navigation bar

The navigation bar gives you quick access to several work areas in ELO. You can quickly switch to work areas without having to go to the *My ELO* home screen.

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

If you have enabled the option to show the number of entries on the tiles, they will also be shown on the navigation bar. To learn how to show the number of entries, refer to the chapter 'My ELO' work area.

Active substitutions



You can substitute for other users or be substituted for by others. In both cases, you can see that a substitution is active by the person icon.

- Orange person: A substitute is currently set for you.
- Blue person: You are currently substituting for at least one user.

Selecting the icon opens more information on your substitutions.

You can learn how to appoint a substitute in the chapter Assign substitute.

You can learn how to accept a substitution in the chapter Accept substitution.

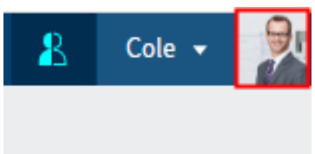
User menu [your name]

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 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].

Profile



This button takes you to your profile. In your profile, you can enter information on your professional background, your contact details, and upload a profile picture.

Context menu

Right-click an entry to open the context menu. Alternatively, use the menu key of a selected entry. The context menu contains selected functions that you will also find on the ribbon.

The context menu contains different functions depending on the work area you are in.

Navigation and use

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

Navigating between work areas

To switch from one work area to another, you have the following options:

- My ELO: Select the *My ELO* button to switch to the desired work area using tiles. This option is always available.
- Navigation bar: Select the desired work area right in the navigation bar. This option is only available if the work area tile is pinned to the navigation bar or you have pinned it as described in the chapter 'My ELO' work area.

How do I use a function?

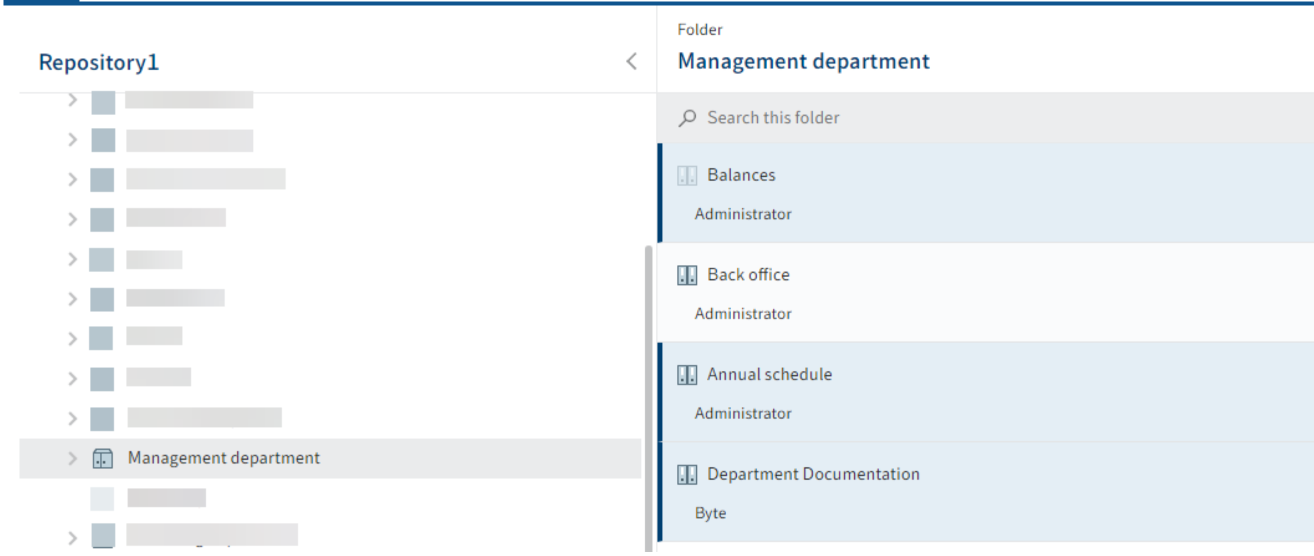
Contextual functions: Functions can only be selected if they can be used in the current context. Otherwise, they are grayed out or are not displayed at all. Most functions are contextual.

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

Non-contextual functions: Some functions are not contextual and can be used at any time. These functions are not related to selected entries. *Assign substitute* or *Refresh* are examples of functions that are not contextual.

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. The entries must therefore be in the same folder.



Method

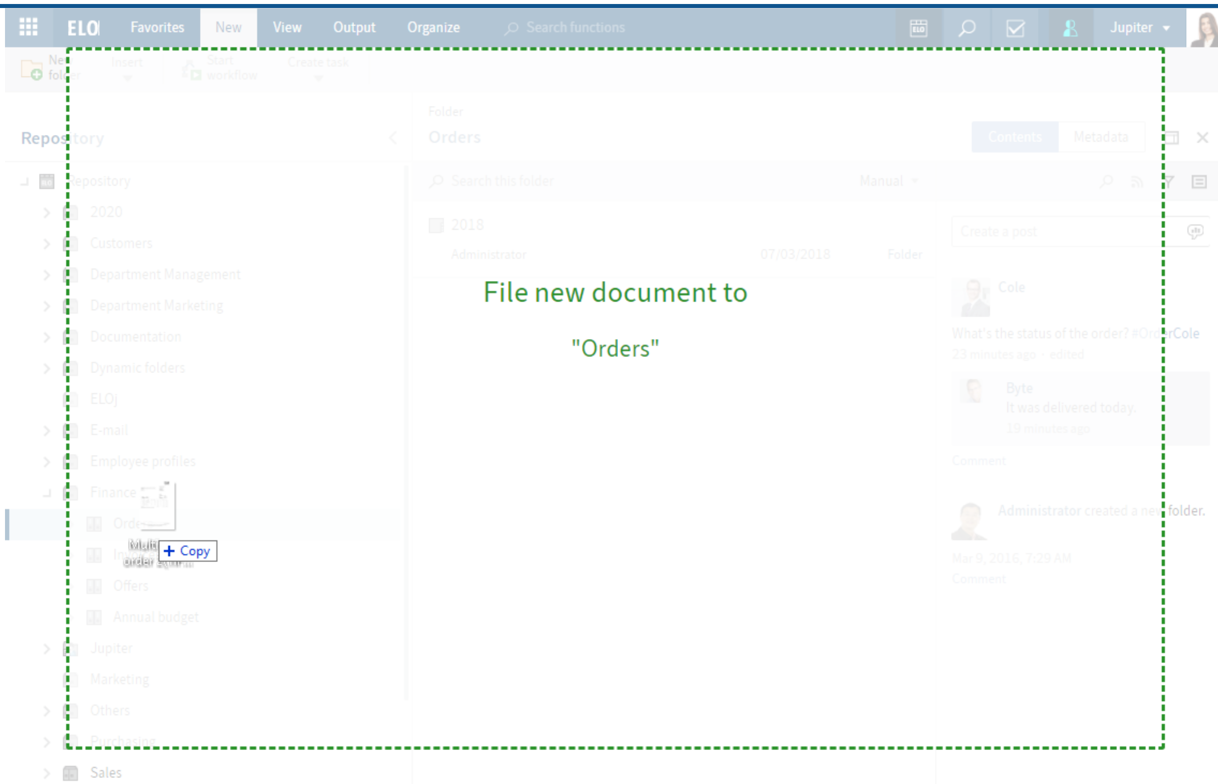
1. Select the folder containing the entries you want to select.
2. Press and hold the CTRL key and select the corresponding entries. If you want to select all entries or all entries you want to select are in a row, press the SHIFT key then select the top-most and bottom-most entry you want to select.
3. On the ribbon, select the function you want to use, e.g. *Send as ELO link*.

Drag-and-drop

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

Insert document

1. Select the folder that you want to file the document to.
2. Select the document you want to file and drag it to ELO.



3. Select a metadata form.
4. Enter metadata.

   For more information on the individual fields, refer to the chapter Metadata.

5. Select *OK*.

> **Information**
>
> You can file complete folder structures, including child folders, in the repository using drag-and-drop.

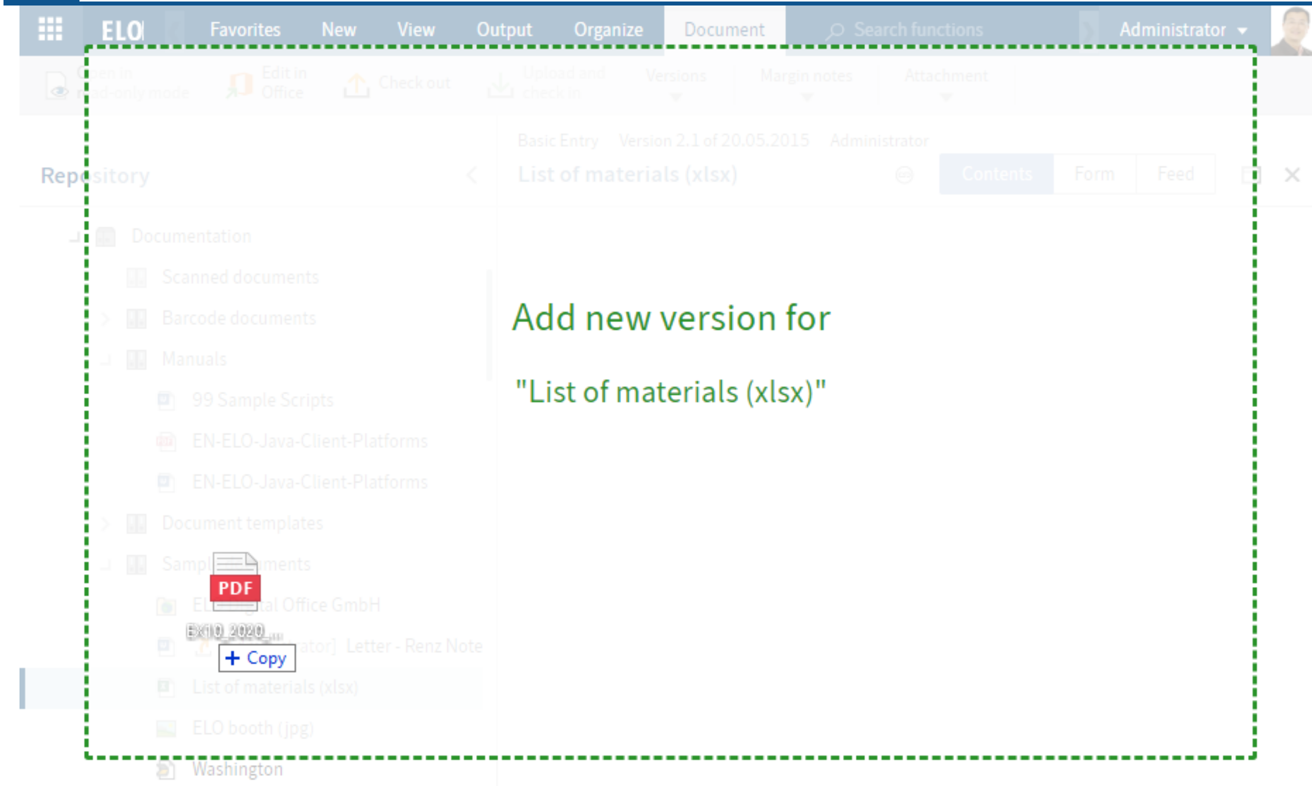
Move or reference entry

Select the entry you want to move and drag it to the target folder holding down the mouse button.

You can reference or move folders or documents in this way.

Load new version

Select the document in your file system you want to file as a new version and drag it to the document in ELO holding down the mouse button.



Non-deletable version: If you enable this option, this version cannot be deleted. This does not mean that you cannot file a new version. You simply cannot delete it from the overview of document versions.

The document is loaded as a new version.

Accessibility

Contrast settings

The contrast settings are based on the specifications of the operating system or browser you are using.

1. Contrast settings in the operating system:
    - Windows: In the settings, go to *Accessibility > Contrast themes* and select a theme to improve visibility.
    - macOS: Go to *System settings > Accessibility > Display* and enable the *Increase contrast* function.
    - Linux: Adjust the display depending on the desktop environment in use.
2. Changes in the browser:
    - In most modern browsers, you can change the contrast settings or choose your own color theme under *Settings > Accessibility* oder *Settings > Display*.
    - You can optimize display using browser extensions (e.g. for color enhancement).

Zoom

You can change the zoom level and font size in the browser settings for improved readability.

You will generally find these settings under *Display* or using the keyboard shortcuts *CTRL +* (Windows/Linux) and *CMD +* (macOS).

Keyboard shortcuts

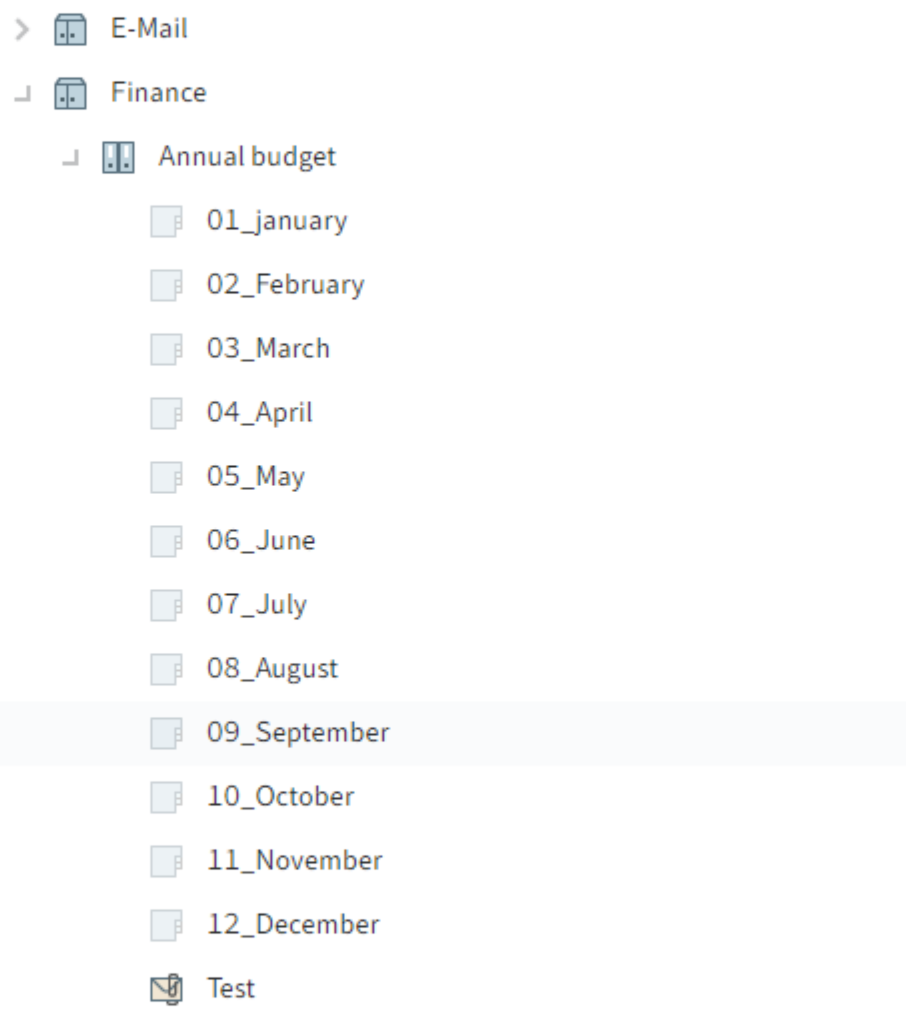
You can switch to certain areas and access functions using keyboard shortcuts. The following table contains an overview of the keyboard shortcuts you can use.

In *Configuration > Keyboard shortcuts*, you can define your own keyboard shortcuts. Please note that certain keyboard shortcuts are not available because they are already used by your browser.

Function	Keyboard shortcut
My ELO work area	CTRL + WINDOWS
Repository work area	ALT + 1
Search work area	ALT + 2
Tasks work area	ALT + 3
Search functions	ALT + M
Metadata	F4

Important components

Repository structure

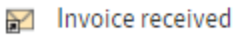


The repository gives you an overview of all folders and documents that you are authorized to access. Navigate between entries in the repository here.

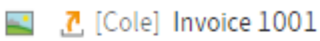
You have the following navigation options:

- Mouse: Click an entry using the mouse. If you click a folder, you will see the contents of the folder in the viewer pane. Clicking the arrow next to the folder expands the contents of the folder in the tree.
- Keyboard: You can navigate up and down the tree using the up and down arrow keys. Pressing the right arrow key opens a folder. Pressing the left arrow key closes the folder.

Icons in entries



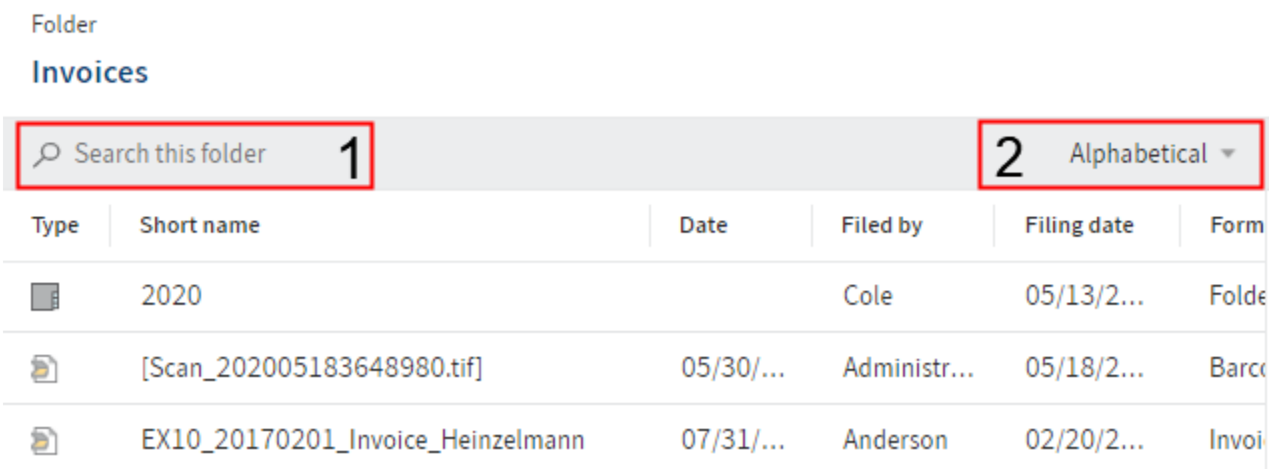
Folders or documents with an arrow icon are references. Select *View > Go to* on the ribbon to go to the original entry.



Documents with a yellow arrow next to the document icon and a name in brackets are checked out by the corresponding user. They can be viewed (*Document > Open in read-only mode*) but not edited.

Folders

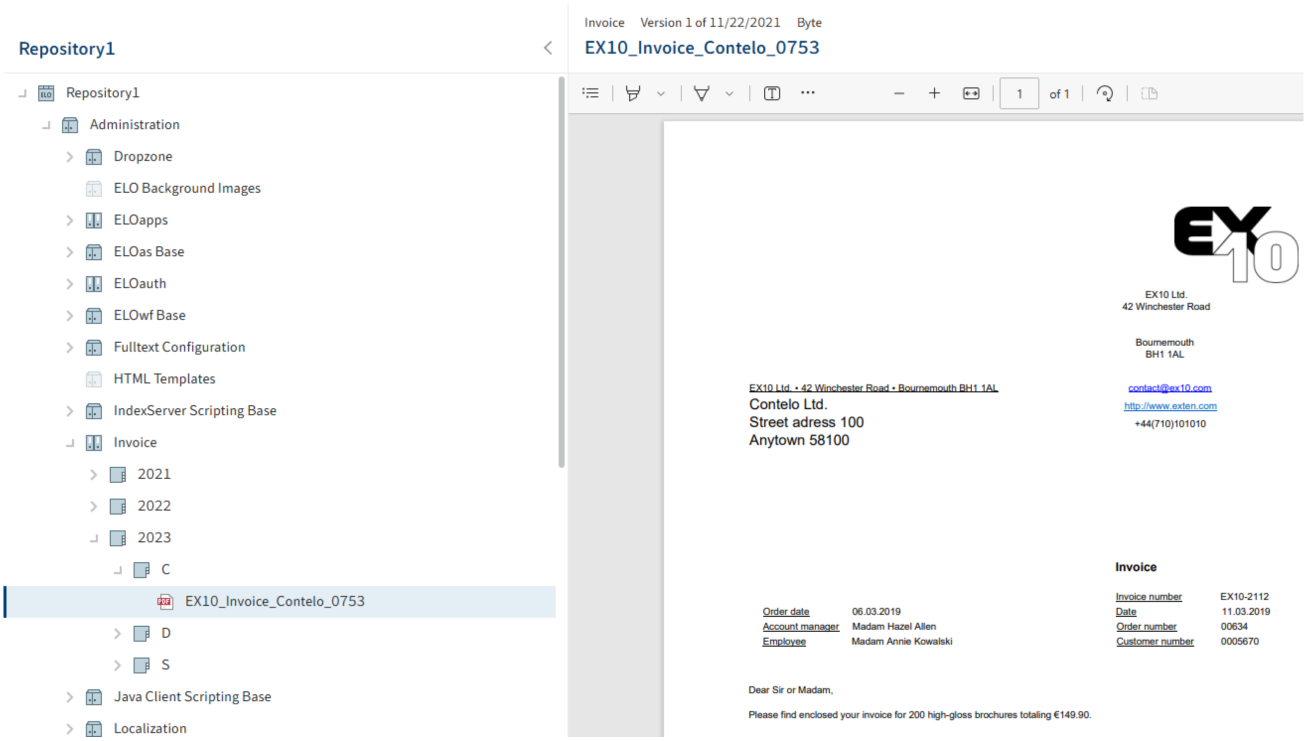
If you have selected a folder, you will see the child folders and/or documents within it.



You have the following options:

- You can search the folder (1) or change the sort order (2).
- After clicking on an entry, you can select multiple entries using the CTRL or SHIFT key. This is not possible in the repository structure.
- If you need more information on the individual entries, switch to the table view (*Ribbon > View > Table*). To switch back to the list view, select the *Table* button again. Double-clicking an entry takes you straight to this entry.

Document



If you have selected a document, the document will be displayed.

If the document cannot be displayed, you have the following options:

- Save document: *Ribbon > Output > Save as*
- Open document in read-only mode: *Ribbon > Document > Open in read-only mode*.
- Switch to different viewing options as described below

You have the following options for viewing the contents of a document:

- Original document: Automatic if no other option is selected.
- Image preview: Available in *Ribbon > View > Image preview*
- Full text: Available in *Ribbon > View > Full text*

Business object

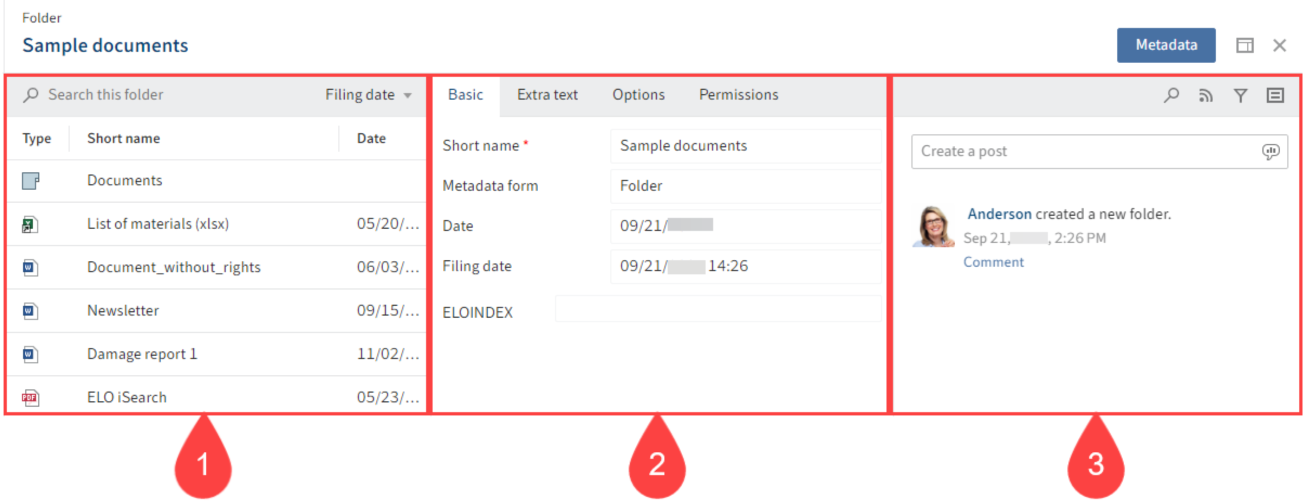
A business object is a special type of folder that helps organize contents into regions. A region is an area encompassing all entries within a business object. This enables you to find related entries faster, e.g. all documents related to a file.

The same options are available in a business object as in a folder.

The Search a business object section explains how to search a business object.

Viewer pane

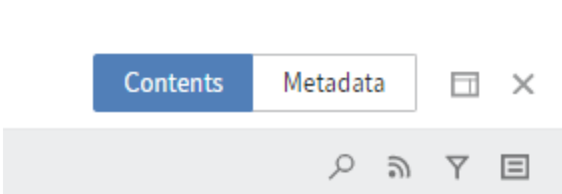
In the viewer pane, you will see the most recently selected entry (folder or document).



Each entry is made up of three elements:

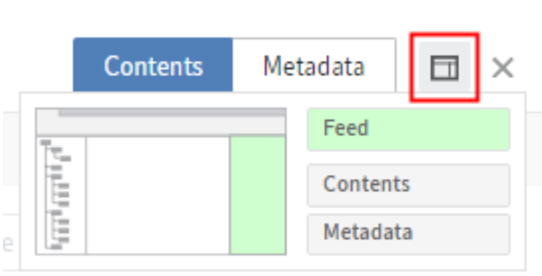
- 1 Content
- 2 Metadata/Form
- 3 Feed

The contents and metadata/form are shown on the left, while the feed is always located on the right.



You can switch between Content and the Metadata/Form using the tabs.

Configure viewer pane



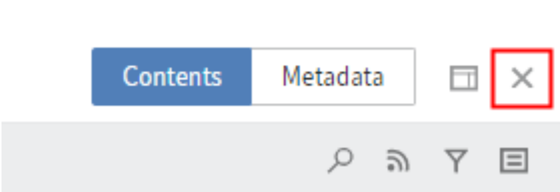
With the button next to the *Content* and *Metadata* tabs, you can show the contents and metadata adjacent to one another. You can also configure which element is shown on the left and which is shown on the right.

If you hover the mouse over a preview element, the element's location is highlighted in green in the miniature preview to the left.

For example, if you have currently selected the metadata for an entry in your viewer pane, click *Content* in the drop-down menu. The contents appear to the left of the metadata. To swap the position of the metadata and content, select *Metadata*. To return to the simple view, select the element marked green, in this case *Metadata*.

Information

The settings for an entry are saved automatically. They are not applied to other entries.



The X icon closes the viewer pane and expands the tree view. The viewer pane appears again when you select an entry in the tree view.

For more information, refer to the Metadata, Form, and Feed chapters.

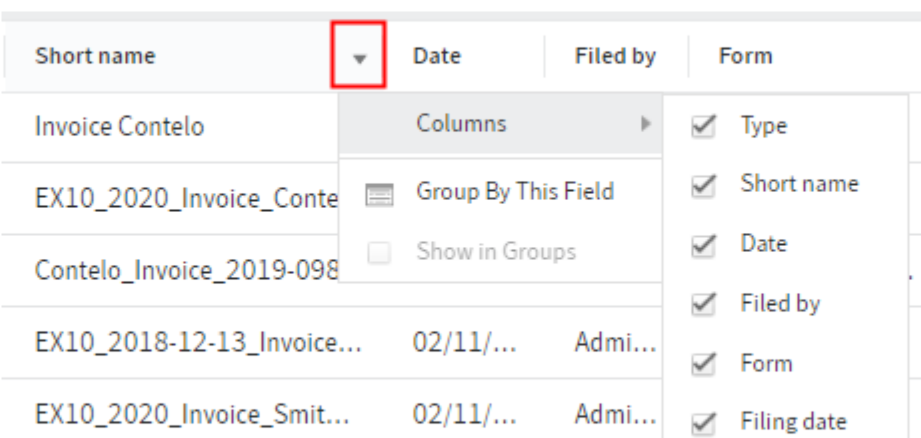
Show entries

On the *Content* tab, you will see the contents of a folder or document.

You can change how entries are shown on the *View* tab.

Folders

Folders are shown in list view by default. To switch to the table view, select *View* > *Table* on the ribbon. The table view shows select metadata for the individual documents.



If you do not need all of the metadata, select the arrow button next to the column header. Clicking *Columns* opens the selection dialog box, where you can uncheck the respective boxes. You can add columns in the same dialog box.

Type	Short name	Date	Filed by	Form	Filing date
– Anderson (7)					
	Invoice Contelo	05/21/...	Ander...	E-mail	06/02/...
	Invoice Renzum AG	10/08/...	Ander...	Invoice	02/20/...
	Invoice Contelo GmbH	10/08/...	Ander...	Invoice	02/20/...
	Invoice Krammper GbR	10/08/...	Ander...	Invoice	02/20/...
	EX10_2017-03-16-Invoice...	07/31/...	Ander...	Invoice	02/20/...
	EX10_20170201_Invoice_...	07/31/...	Ander...	Invoice	02/20/...
	Invoice expected	01/05/...	Ander...	E-mail	05/09/...
– Cole (1)					
	EX10_2020_Invoice_Contelo	06/02/...	Cole	Basic Entry	05/13/...
– Administrator (11)					
	Contelo_Invoice_2019-0989	04/29/...	Admi...	Barcode recogn...	05/12/...

By selecting the arrow button icons, you can group documents based on their metadata. If you uncheck the *Show in groups* box, the table is once again shown without grouping.

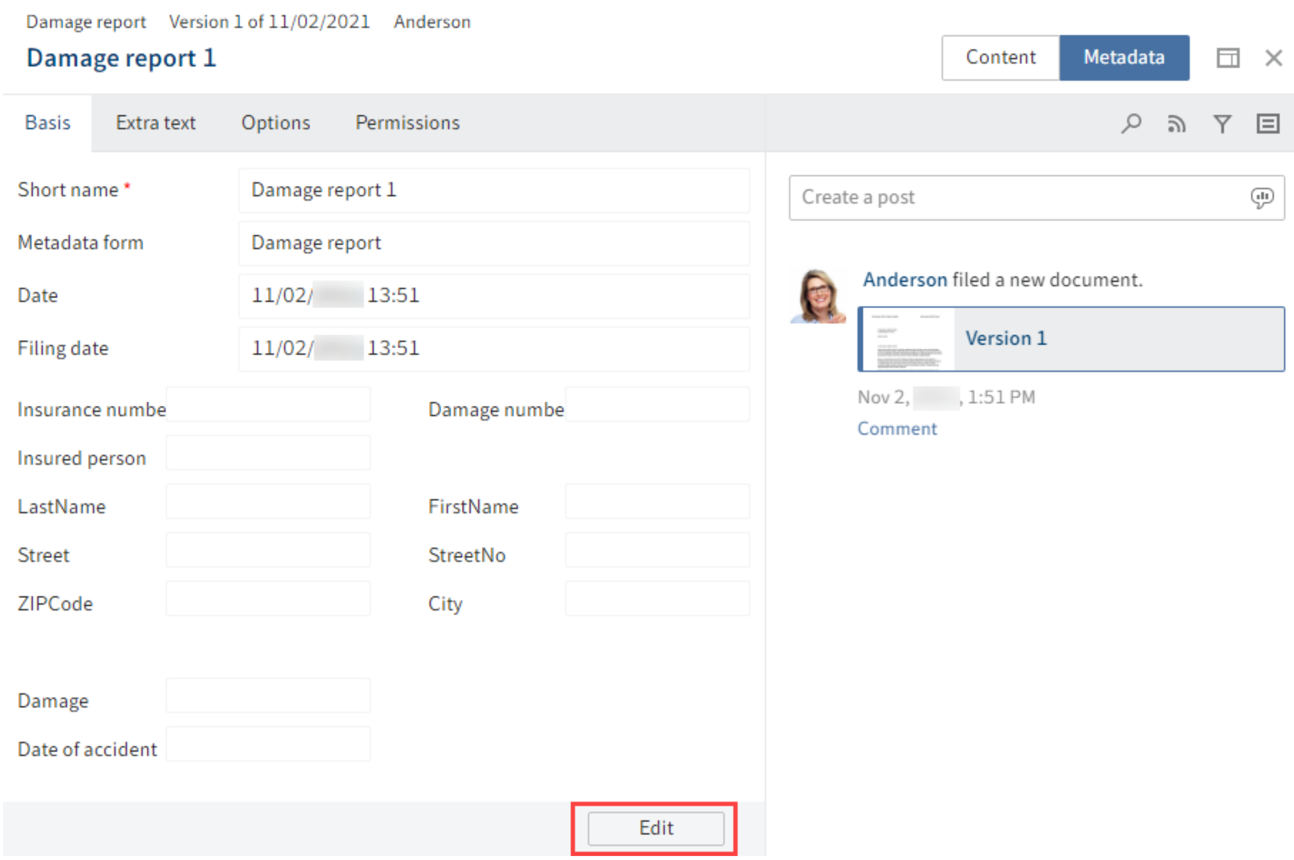
Documents

- Image preview: Use this function to display documents if there is no viewer available for the original format.
- Full text: This function is useful for searches. A search field for entering terms appears below the text. This mode is also suitable if you do not have a viewer for the original format and no image preview is available.

Metadata

Before you can file documents to ELO or create new folders, you must enter metadata for the entries. This is done by using metadata forms, which contain corresponding input fields (called *fields*).

The *Metadata* dialog box is used to enter and edit the metadata. Unless you have a different configuration, the dialog box appears automatically when you file a document or create a folder.



The metadata for an entry is shown on the *Metadata* tab. If you select the *Edit* button at the bottom, you can edit the metadata right in the viewer pane.

If you have selected an entry with a form, the form is displayed. In this case, you can open and edit the metadata from the ribbon by clicking *Organize > Metadata*.

For more information, refer to the chapter Metadata.

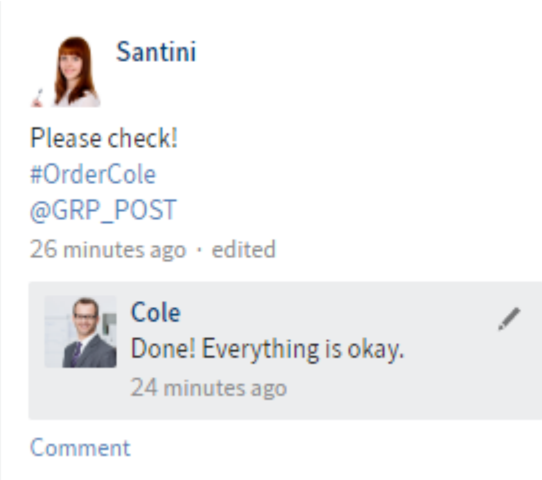
Form

If you have selected an entry with a form, the form is displayed. In this case, you can open and edit the metadata from the ribbon by clicking *Organize > Metadata*.

You can use forms to record and forward data.

You can use forms to process workflows.

Feed



The feed is used to share information on an entry in ELO (document or folder) and track changes. New feed posts are denoted with a green dot.

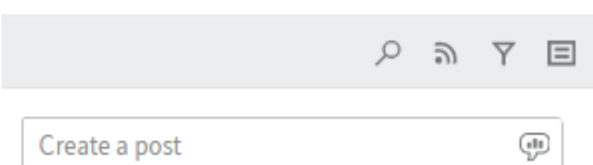
When you subscribe to a feed for an entry, any new posts in the feed are shown on your *My ELO* home screen.

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 a post



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

Alternative: Press CTRL+ENTER to submit a post.

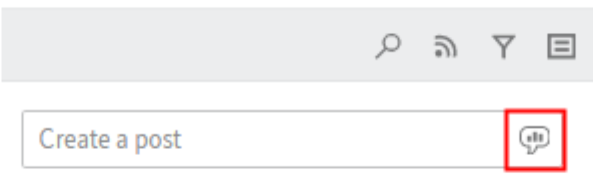
The text in posts, polls, and comments can be formatted as follows:

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."

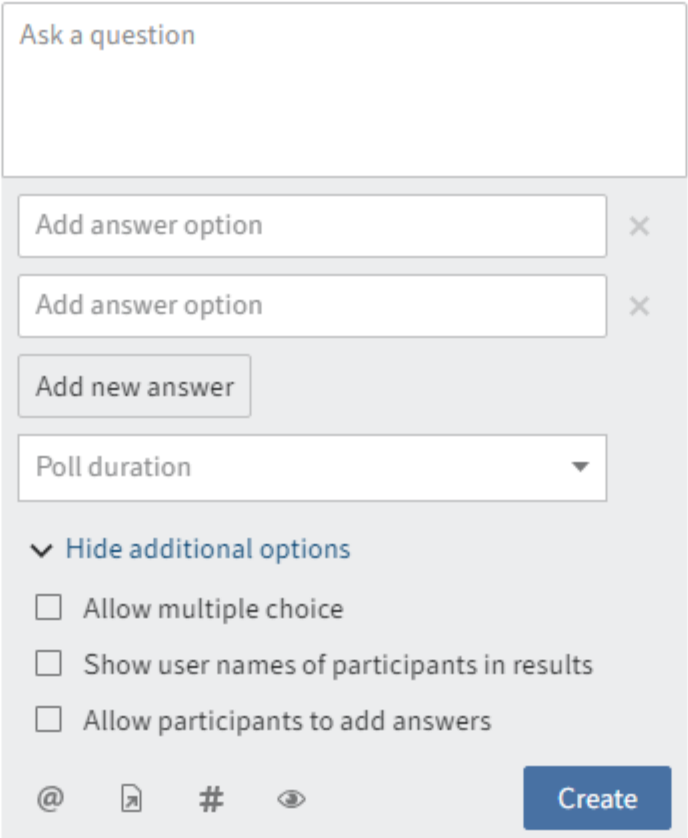
> **Information**
>
> If you want the asterisk to appear as a character in the text, enter a backslash before the asterisk.

> **Please note**
>
> Do not enter any words that can act as search operators (`NOT`, `OR`, `AND`) in feed posts or hashtags. Otherwise, you may encounter issues when searching for these words.

Create poll



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



Poll duration: You can select how long you want the poll to remain open in the drop-down menu. You can also enter a specific number of days. For example, enter 14 for two weeks.

The *Show more settings* drop-down menu opens an area with additional settings.

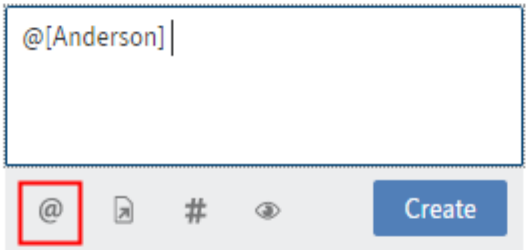
- Allow multiple choice
- Show user names of participants in results: The names are visible to all users participating in the poll. If this option is disabled, the poll is anonymous for you as well.
- Allow participants to add answers

Select *Create* to start the poll.

Once a user has taken a poll, it can no longer be modified.

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

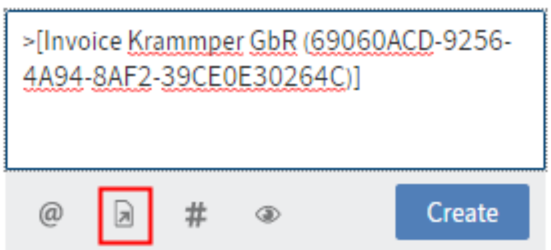
Mention



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



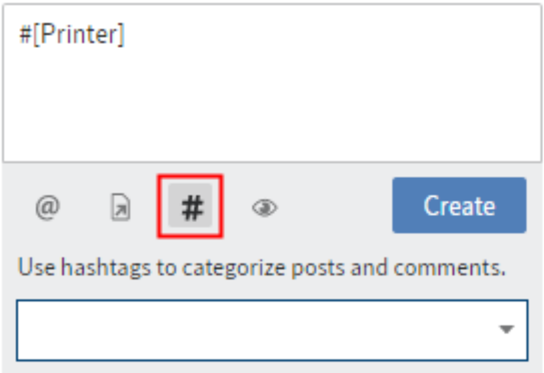
Use the *Reference* button (document icon with arrow) to link a feed post with an entry in ELO. The *Reference* dialog box appears. In the dialog box, select the entry in the tree view you want to reference.

Select the reference in the feed post to go straight to the respective entry.

Alternative:

- As soon as you type a > character, ELO automatically recognizes that you want to insert a reference. The *Reference* dialog box appears.
- Select the entry you want to reference and then press CTRL+C. Select the entry you want to insert the reference into and press CTRL+V in the feed post.

Hashtag

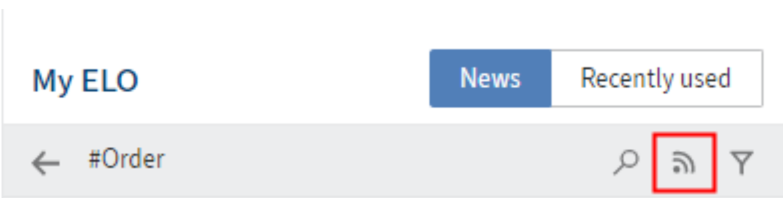


Use the *Hashtag* button (# symbol) to add hashtags to a post. You can subscribe to hashtags. You can also filter the *My ELO* work area by hashtags.

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

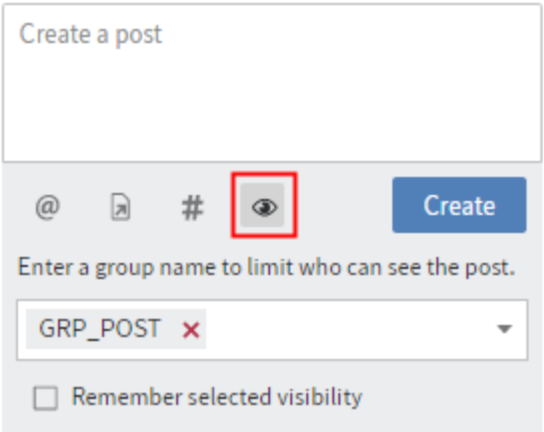
To be notified of new posts related to a specific topic, you can subscribe to hashtags.



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

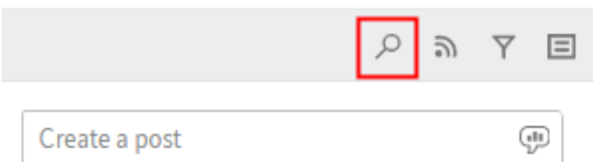
You have subscribed to the hashtag. All posts that are marked with the corresponding hashtag appear in the *My ELO* work area.

Visibility



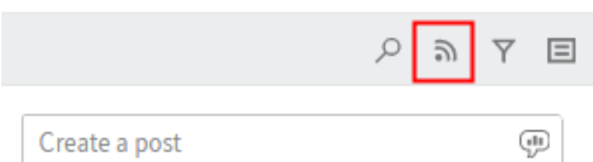
Use the *Visibility* button (eye icon) to restrict who can read the post.

Search feed



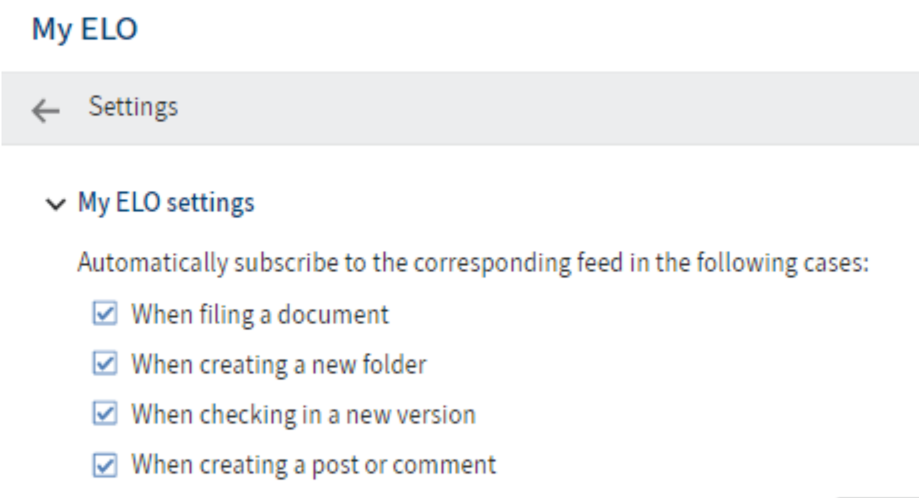
Select the *Search feed* button (magnifying glass icon) to search within the currently selected feed. When the search term is found, the feed is narrowed down to the corresponding posts. The matches are highlighted. You can start the search with the magnifying glass icon. To reset the search and display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

Subscribe to feed



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.

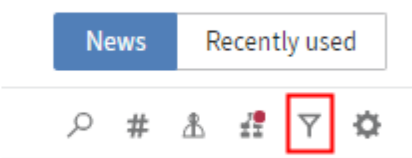
Automatically subscribe to feed



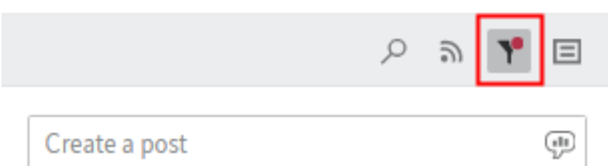
ELO provides you with the option to automatically subscribe to feeds.

You can enable the automatic feed subscription option under *My ELO > Settings* or *User menu [your name] > Configuration > Administration > My ELO*.

Show filter options

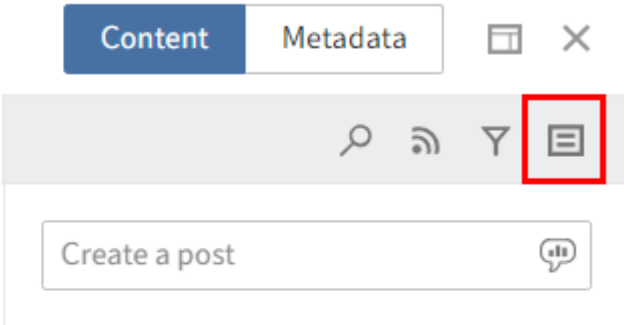


The *Show filter options* button opens a window with filters for the corresponding feed. You can use these filters to restrict the feed to posts that match the respective filter.



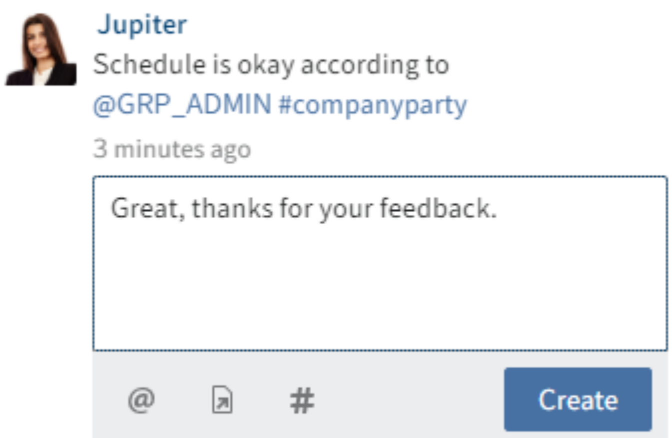
You can also see when filters are active, even when filter options are hidden.

Show metadata



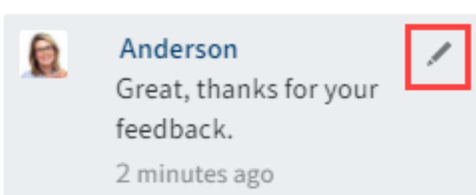
You can select the *Show metadata* button (document icon) to view the metadata of the entry. The metadata form associated with the entry is always displayed. The fields of the form are only displayed if they contain data. In gen, 2 metadata forms, only the form associated with the entry is displayed,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

Enter a 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

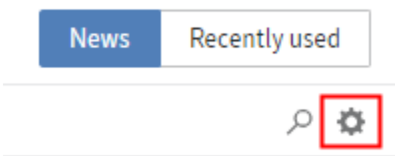


Select the *Edit* button (pencil icon) to edit feed posts and comments.

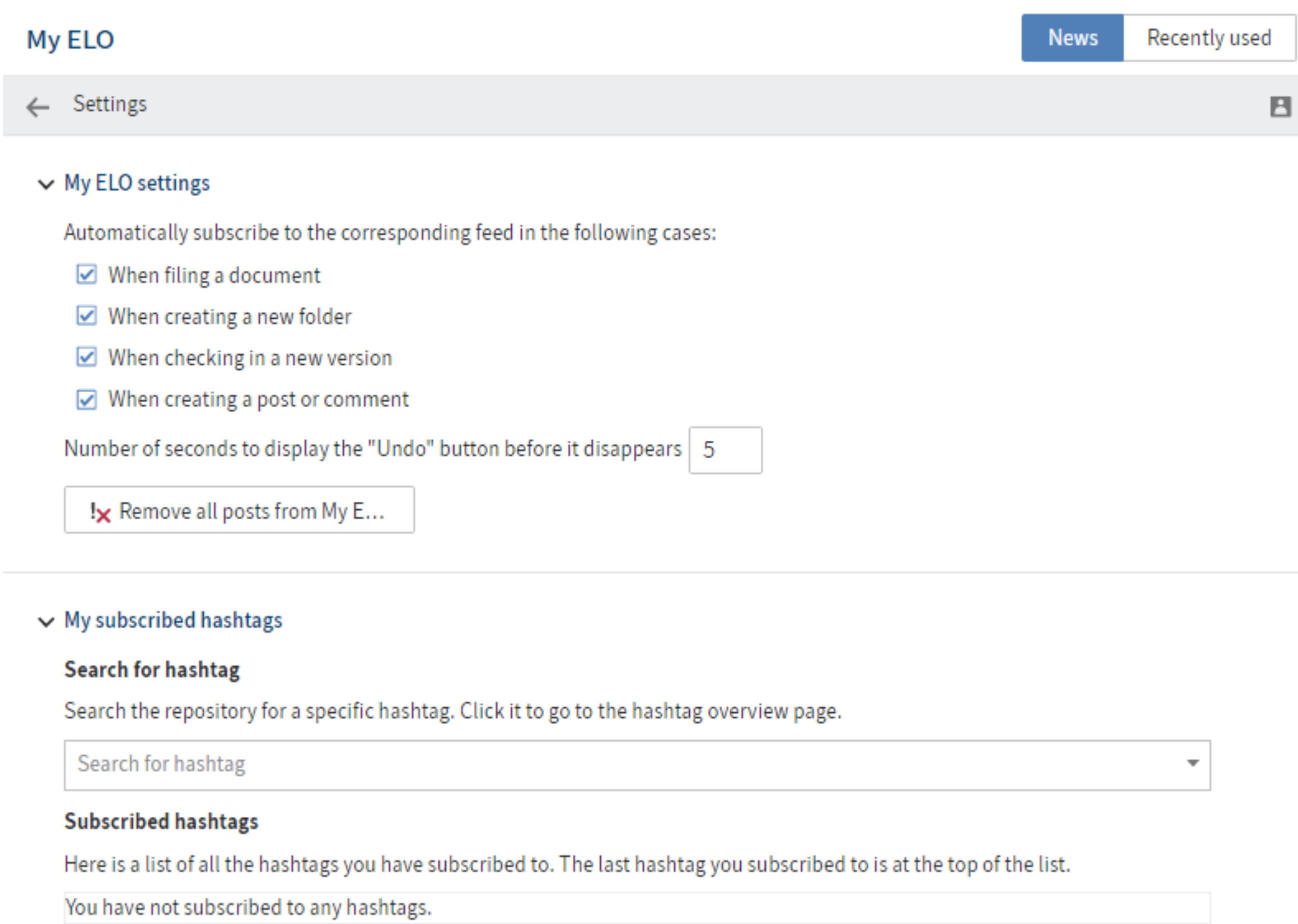
Feed history

Edited entries are marked as *edited* below the entry. Select *edited* to open the editing history.

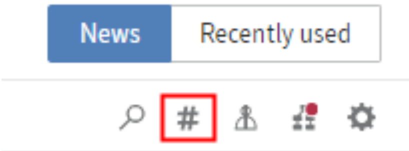
Settings



Select the *Settings* button to change settings related to the feed.



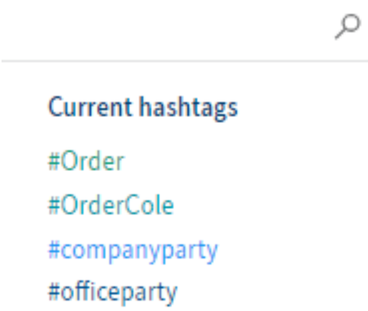
Show current hashtags



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

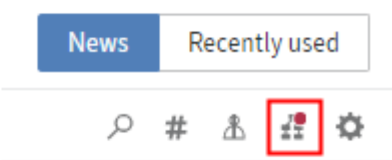
If you select the *Show current hashtags* button, hashtag information is displayed above the subscribed feed.

Hashtag cloud



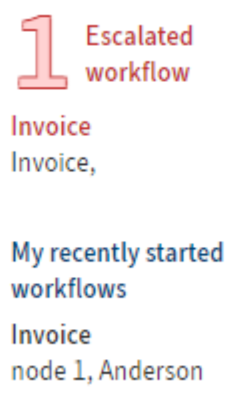
Hashtags that have been used in recent weeks are shown in a hashtag cloud. If you select a hashtag, you will see all feed items that contain that hashtag, provided you have the required permissions.

Show workflows



If the preview in *My ELO* is not large enough to show workflow information, the *Show workflows* button will appear. In this case, workflow information is displayed above the subscribed feed.

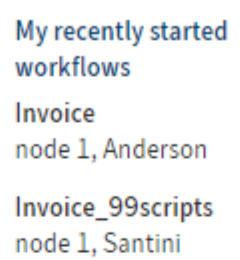
Escalated workflows



In the *Escalated workflows* area, you can see which escalated workflows you are involved in.

Selecting the workflow name takes you the respective workflow in the *Tasks* work area.

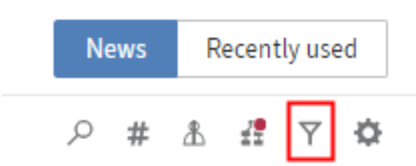
Recently started workflows



In the *My recently started workflows* area, you see which workflows you have recently started.

Selecting the workflow name takes you to the entry you started the workflow on.

Show filter options



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

If you select the *Show filter options* button, the filters are displayed above the subscribed feed.

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

Filters in 'My ELO'

Various filter categories are available.

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:

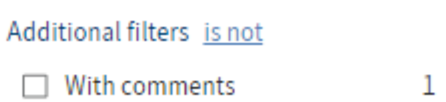
- Automatically created posts (e.g. *working version changed*)
- Posts created by users (e.g. *user posts*)

Apply filters

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

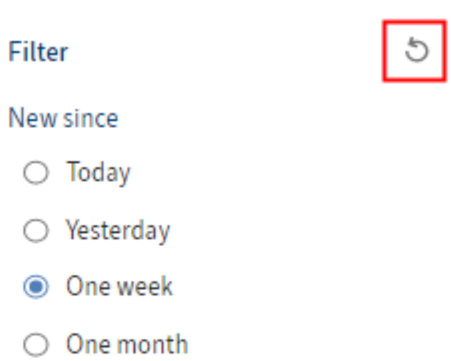
Negate filters

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



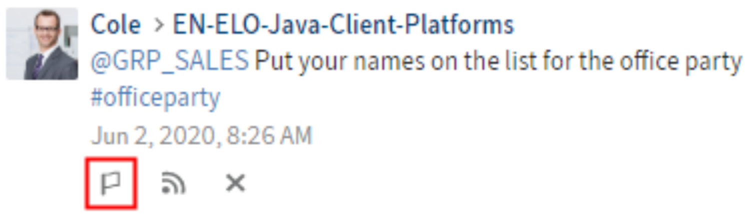
The mode can be switched to *is not* in all categories apart from *New since*. Click the word *is* next to the name of the filter category.

Reset filters



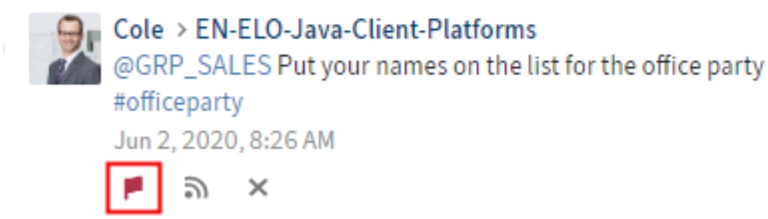
To reset all filters, select the *Reset filters* button (arrow icon).

Mark as important



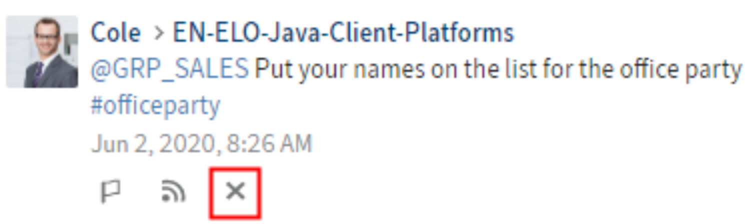
The *Mark as important* button (flag icon) lets you pin a post to the *My ELO* work area. The post remains in *My ELO* even if it is more than one month old. You can recognize posts that are marked as important by the red flag icon.

Delete marker



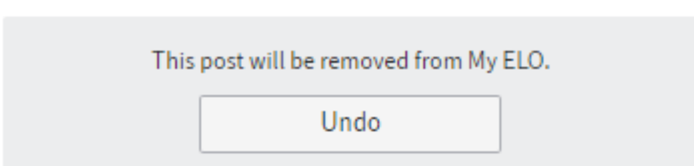
The *Delete marker* button (red flag icon) enables you to delete the marker you added to a post. As soon as the post is more than a month old, it will no longer be displayed in the *My ELO* work area.

Hide post



The *Remove from My ELO* button enables you to hide a post in your *My ELO* work area.

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

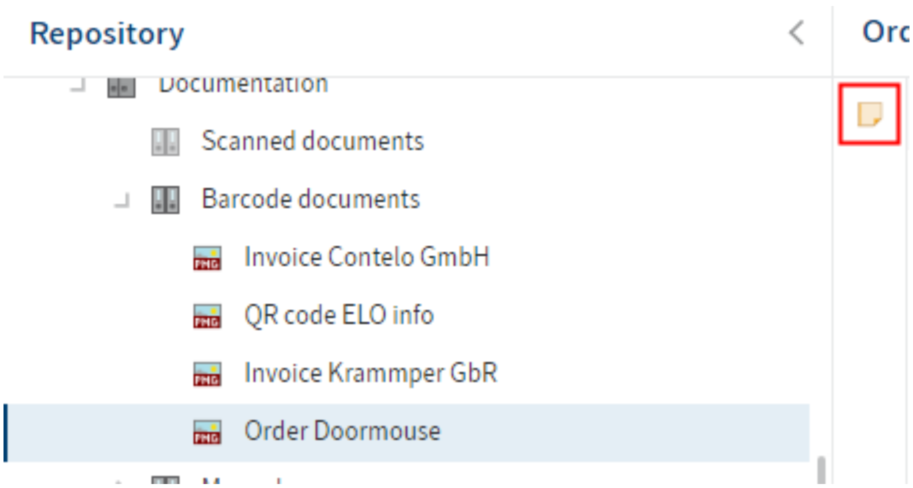


If you hide a post, the *Undo* function is displayed. Select this button to show the post again.

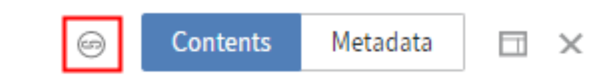
> **Information**
>
> The *Undo* function is only displayed for five seconds by default. You can change the length of time it is displayed in *My ELO > Settings > My ELO settings*.

Margin notes, links, attachments

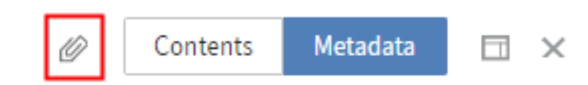
If available for the selected document, you will see the following additional elements:



- Margin notes: You will see margin notes for an entry on the split bar. Selecting the icon opens the margin note.



- Links: The chain icon represents a link. Clicking the icon opens an overview of links. You can also create additional entries as links. The embedded dialog box does not close automatically when you select another entry. Close it by clicking *Close*.



- Attachments: The paper clip icon represents an attachment that was filed along with the selected document. Select the icon to open the attachment.

Attachments open in the browser or in an external program, depending on the administrative settings. If attachments are set to open in your browser, you may not be able to open some documents in read-only mode.

Important actions in detail

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

Create new folder

Before you can file documents, you will need folders in the *Repository* work area.

There are several ways to create a folder. This chapter describes the function *New folder*.

Related functions

- Copy: If a folder with the basic structure you need already exists, you can copy this basic structure without content.
- Dynamic folder: This function allows you to create a folder whose content changes dynamically. The content of a dynamic folder is based on the result of a search. All search results appear in the folder.

Example

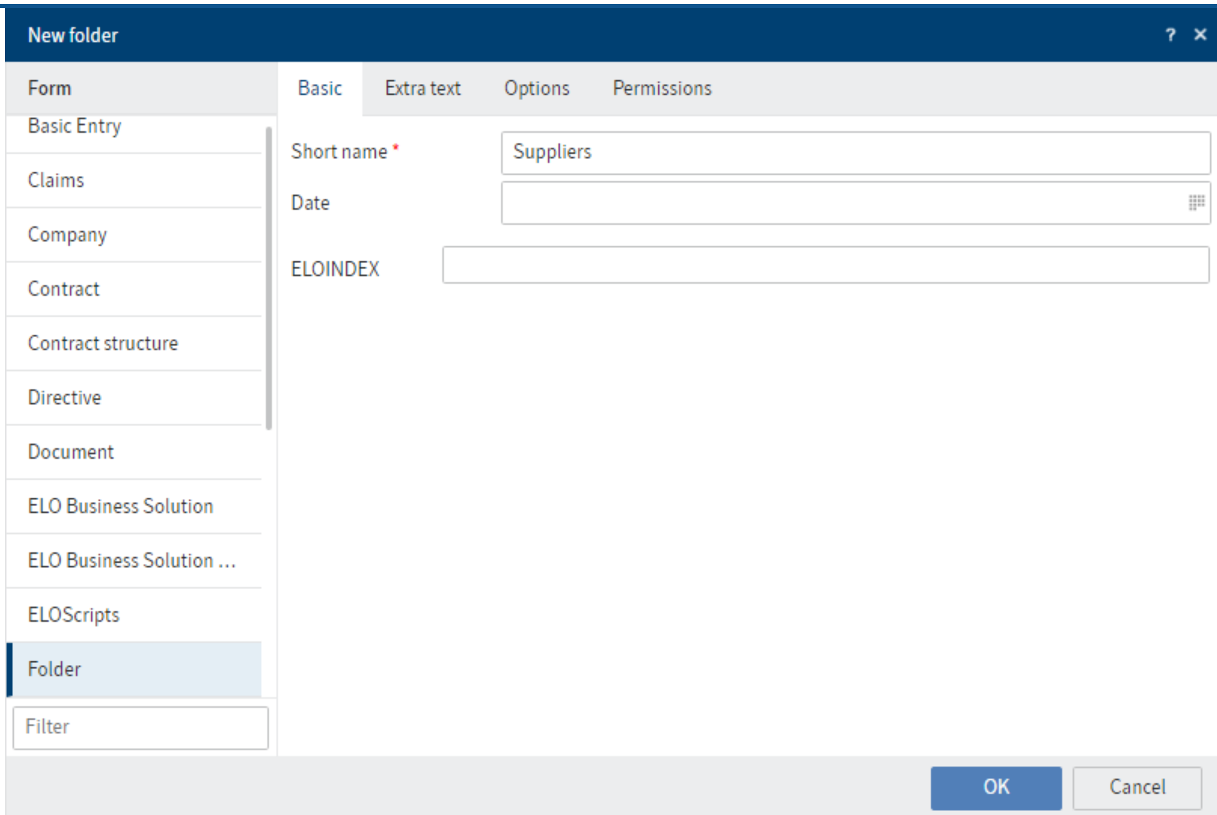
You want to create a folder for a new project your team is working on. Only part of the team is actively involved the project and should be allowed to store content. The rest of the team should only have read access.

Method

1. In the repository, select the folder where you want to create the new folder.

   A new folder is always created within the folder you have currently selected. The top level of your repository is also a folder.

2. On the ribbon, select *New > New folder*.



3. Enter the name of the project folder in the *Short name* field.

   The name you enter here is the folder name users will see in the repository.

   You don't usually need the *Additional text* tab. It can be used to store information in the metadata if a corresponding field is not available. This can be useful for the search function.

4. Select the *Options* tab.

5. To ensure that the folder is easy to find, select *Green* from the drop-down menu in the *Font color* field.

6. Select the *Permissions* tab.

   When you create a new folder, the permissions of the parent folder are always applied.

7. To change the permissions, first delete the parent permissions by selecting the X icon.

8. To apply the new permissions, select the arrow in the *Add user/group field*.

9. Select your team members.

10. For all team members who should only have read permissions, uncheck all the boxes except *View (R)*.

    For a detailed description of other fields, refer to the Metadata chapter.

11. Select *OK*.

Result

The folder is created at the location you chose and can be accessed by all team members you selected. Other users will see the folder but not the contents.

Outlook

Like physical folders, you can add contents to folders: You can create additional child folders or file documents directly to them.

Change folder name: If you want to change the name of a folder afterwards, proceed as follows:

1. Select the folder.

2. Select *Organize > Metadata* on the ribbon.

3. Change the name in the *Short name* field and confirm with *OK*.

Create tile

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

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

There are different types of views. This chapter covers the *Create view* function for a folder.

Related functions

- Task view: A task view shows you tasks with criteria you selected.
- Add favorite: Like views, search favorites are also displayed as tiles on your *My ELO* home screen.
- Copy to Clipboard: If you want to quickly access your folder without creating a tile, you can place it on your Clipboard.
- Most recently used: Another way to quickly access your folder is with the *Most recently used* tab on your *My ELO* home screen. You can pin folders here.

Example

Since you are likely to need your project folder frequently during the project, create a tile for it that will take you directly to the folder from your *My ELO* home screen.

Method

1. In the *Repository* work area, select the project folder you want to create a view for.

2. On the ribbon, select *View > Create view*.

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

3. Select *Save*.

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.
- 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.

Filing entries

You can store documents and folders in a folder. Other users who are authorized to do so can view or edit the documents.

There are several ways to store entries. This chapter describes the function *Insert file*.

Related functions

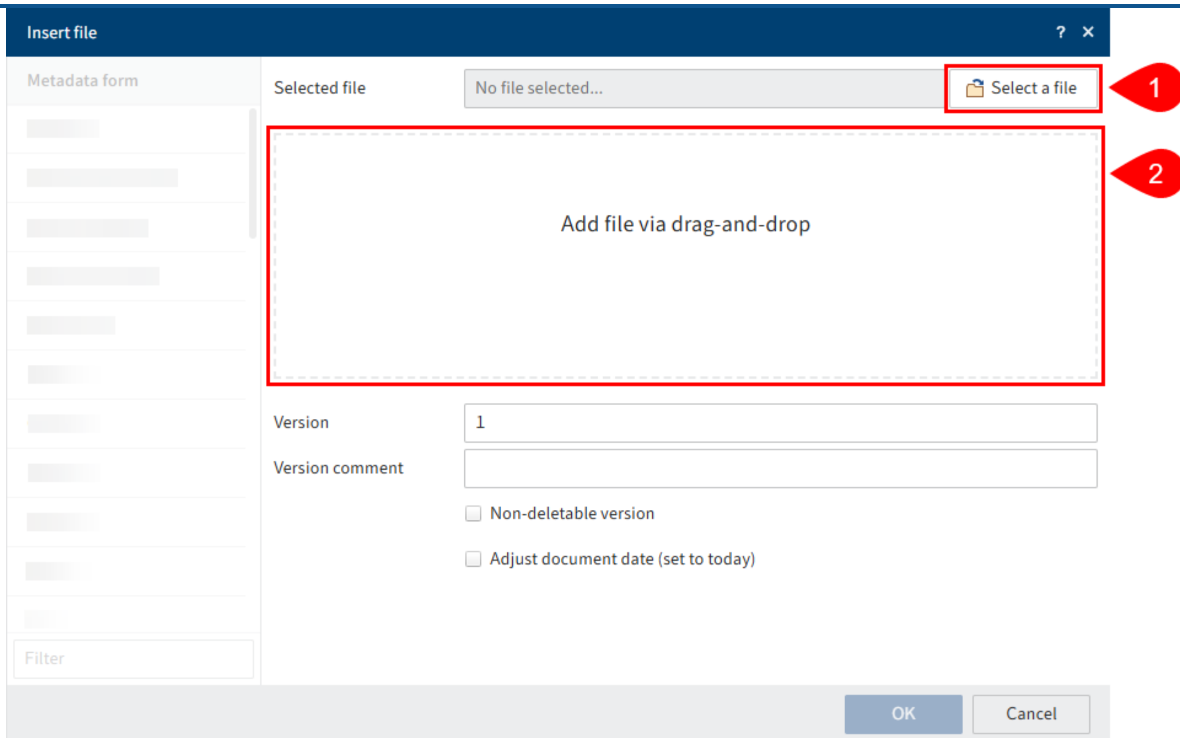
- Drag-and-drop: You can drag documents and folders straight from your file system to a folder in ELO.
- Document from template: If you want to create a document from a template, use this function.

Example

You want to put a Word document in your project folder so you can plan the project with the other team members.

Method

1. Select the folder that you want to file the document to.
2. On the ribbon, select *New > Insert file*.



You have two options:

1: Select the *Select file* button and select the document.

2: Drag the document to the *Add file via drag-and-drop* field.

3. Select a metadata form.

4. Enter metadata.

   For more information on the individual fields, refer to the chapter Metadata.

5. Select *OK*.

Result

The document is stored in the folder you selected.

Outlook

Once you have stored a document, you and other users can perform all the functions that are available when you select the document.

The *Document* tab opens. The functions on this tab are only available for documents. For more information on these functions, refer to the chapter 'Document' tab.

Some important functions for working with documents are:

- Check out
- Upload and check in
-

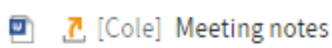
Start workflow
- Ad hoc workflow
- Send as ELO link
- General margin note

Check out and edit document

A document stored in ELO can be changed unless it has been configured otherwise.

There are different functions you can use to edit documents. This chapter covers the *Check out* function.

While the document is checked out, it is locked for other users. During this time, other users can only view the document in read-only mode (*Document > Open in read-only mode*). This prevents a document from being edited by multiple users at the same time, resulting in conflicting versions.



You can recognize checked out documents by a yellow arrow next to the document icon. The name of the editor is shown in square brackets.

A new version of the document is created, which becomes the new working version. The working version is always the version that you see when you select the document.

The old version is still retained.

Related functions

- Edit in Microsoft Office: This function allows you to open and edit Microsoft Office documents.
- Edit online: This function allows you to edit Microsoft Office documents in your browser. The availability of this function depends on your ELO Web Client installation.
- Collaborate: This function allows multiple users to simultaneously edit a Microsoft Office document. The availability of this function depends on your ELO Web Client installation.

Method

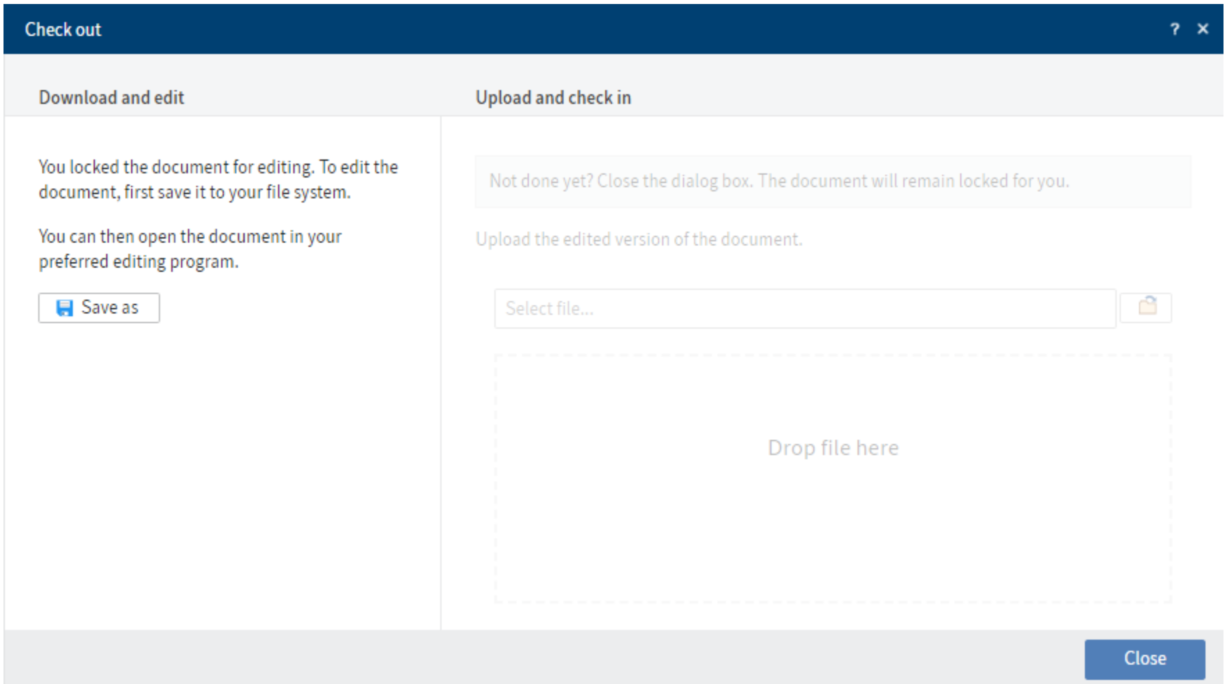
1. Select the document you want to edit.

2. On the ribbon, select *Document > Check out*.

> **Information**
>
> If you select *Close* now, the document is still checked out. If you want to cancel the action, select *Close* and then select *Document > Versions > Cancel editing* on the ribbon.

> **Information**

If you use ELO Web Add-ons in combination with SSO, the document is opened in an external application and can be edited.



3. Select *Save as*.

   The document is saved in your standard download folder.

   Optional: A Windows dialog box may appear. Select an option for saving the document.

4. Open the document.
5. Edit the document.
6. Save the changes.

Warning

If you do not save the document, any changes you made will be lost.

You do not have to check the document back in right away. You can keep it checked out and edit it later by opening it from the local storage location on your computer.

In addition to the *Repository* work area, you will also conveniently find the document in your *In use* work area as long as you have it checked out.

Result

The document is changed locally but not in ELO.

Outlook

-

To apply your changes to ELO and save your document as a new version, use the Upload and check in document function.

- If you want to discard the changes, use the Cancel editing function.

Upload and check in document

After you have checked out a document and finished editing it, check it back in.

This saves the modified document as a new version and unlocks the document.

Related function

Cancel editing: If you want to discard the changes, use this function.

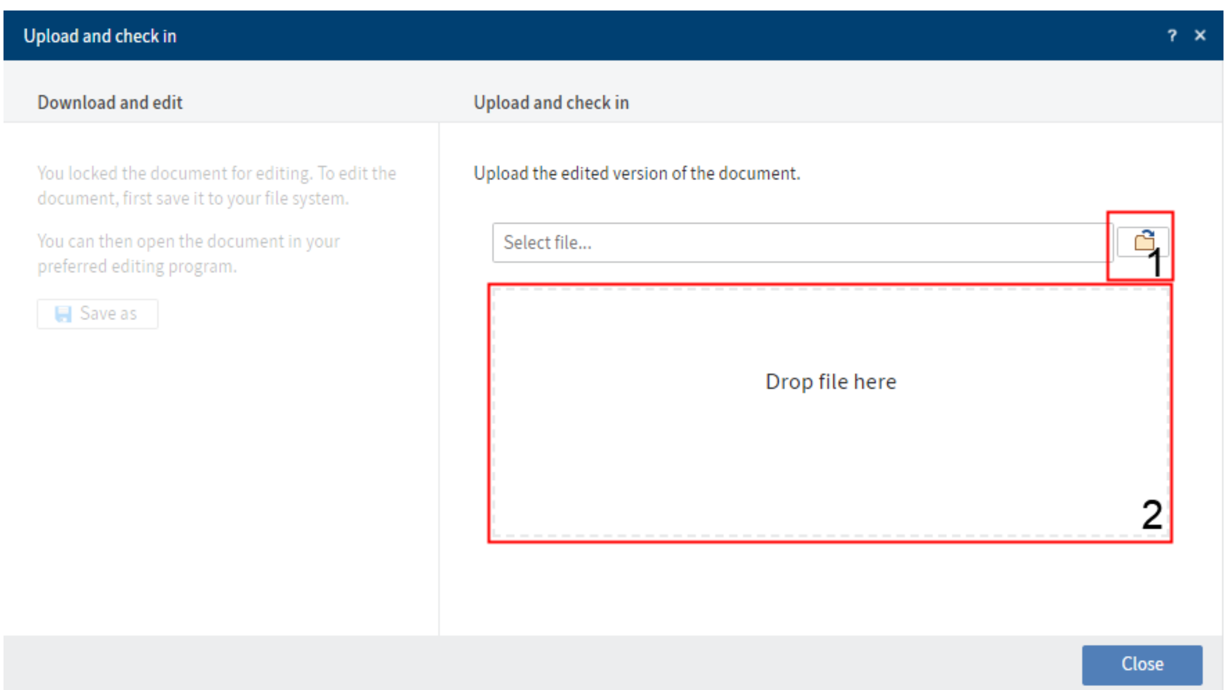
Method

> **Information**
>
> If you edited a document immediately after checking it out, the *Upload and check in* dialog box remains open. Steps 1 and 2 are no longer necessary in this case.

1. In ELO, select the document you want to check in.

   The quickest way to find the document is through the In use work area.

2. On the ribbon, select *Document > Upload and check in*.



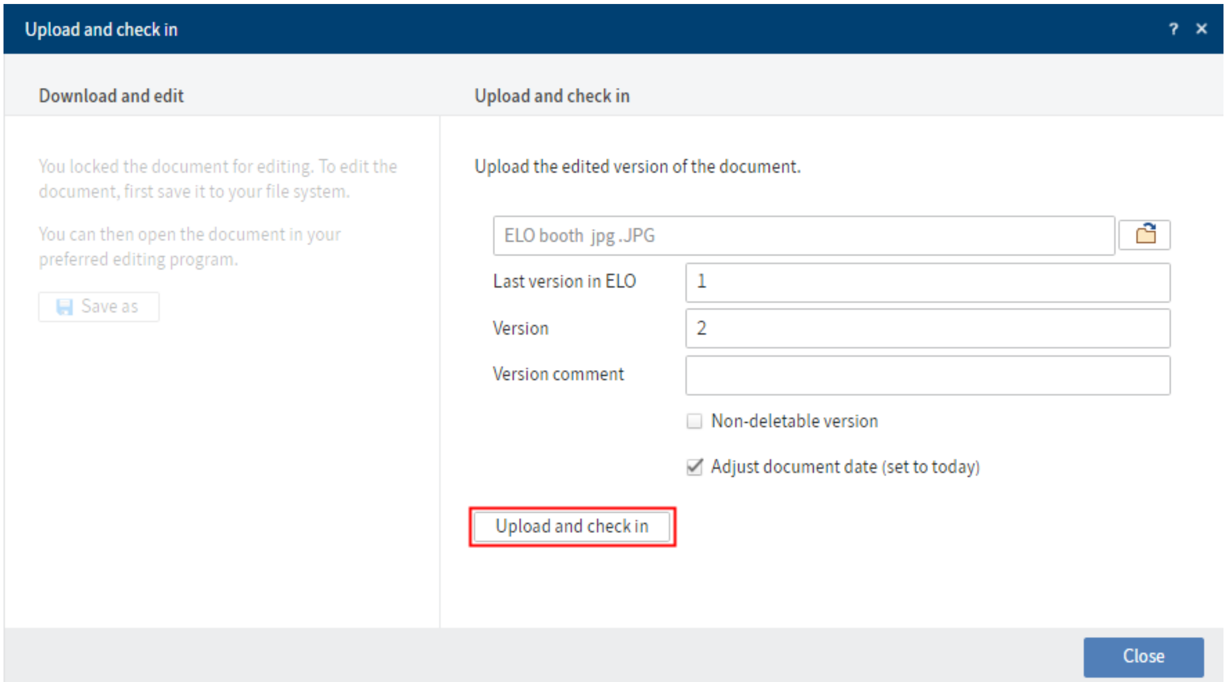
> **Information**

If you use ELO Web Add-ons in combination with SSO, select *Upload and check in*. The document is already selected and can be checked in directly.

3. Select the file. You have the following options:

   1 Select the button to the right of the *Select file* field and select the file.

   2 Drag the file to the *Drop file here* area.



Result

The document is filed as a new version.

The document is unlocked for other users.

Outlook

To learn how to revert to an older version, refer to the Document versions chapter.

Start workflow

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

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

This chapter describes the function *Start workflow*. This function gives you access to workflows with different levels of complexity designed for specific processes within your company.

Related function

Ad hoc workflow: The function *Ad hoc workflow* is used to start short default workflows (approval and notification).

Example

You want to place an order for materials at the start of your new project. You have already created a document listing the required materials using the Document from template function. To forward the order to the corresponding department in your company, you need to start the workflow.

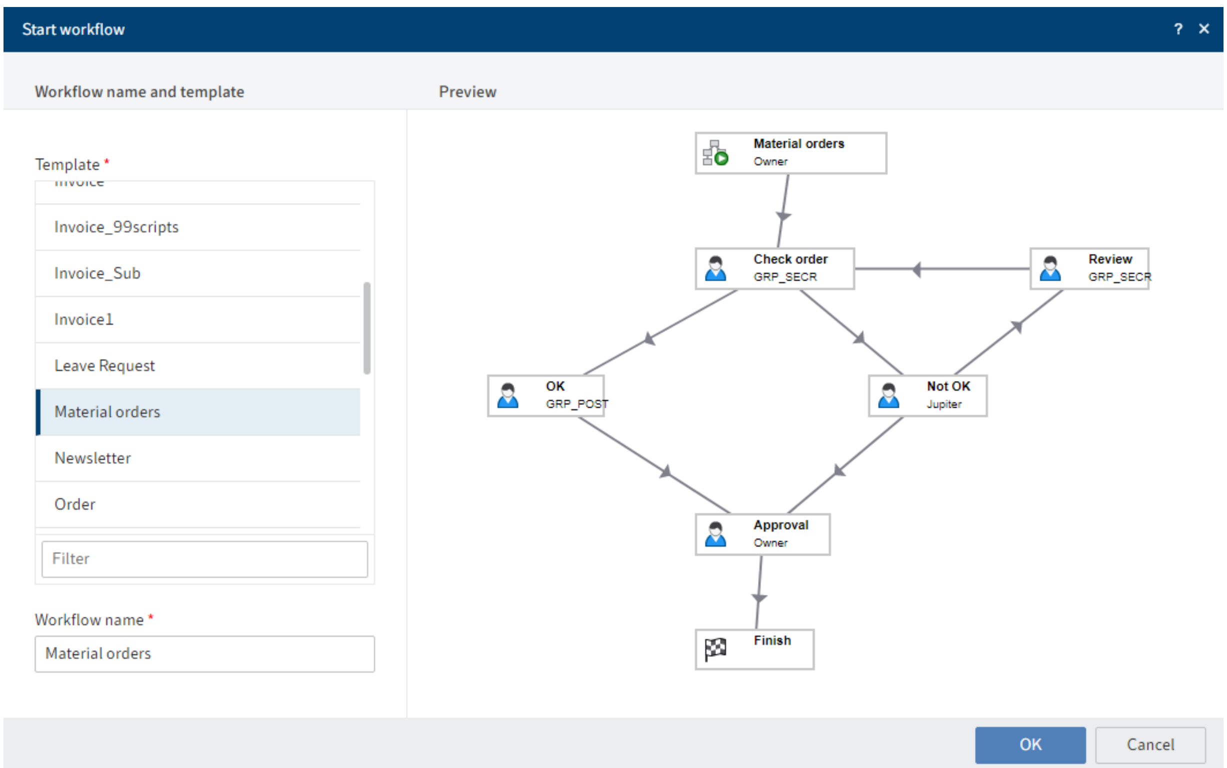
Method

1. Select the document you want to start a workflow on.

> **Information**
>
> You can also start workflows on folders.

2. On the ribbon, select *New > Create task > Start workflow*.

3. Select a workflow template.



Preview: This is where you can see the different steps of the workflow. As the workflow is already configured, you do not have to make any additional settings.

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).

4. Select *OK*.

Result

The workflow starts.

Outlook

- Once you have started a workflow, it will appear in your *My ELO* work area under *My recently started workflows*.
- If one of your workflows was escalated, you will see the *Escalated workflows* area.

Forward workflow

When you are assigned a workflow task, it will appear in your *Tasks* work area.

There are different ways to forward a workflow. This chapter describes the preferred method with forms.

> **Information**
>
> You can configure how ELO will behave in the configuration (*Display > Tasks*). If the *Show ribbon function and "Forward workflow" dialog box* option is enabled, you have to use the *Forward workflow* function to process and forward the workflow in a new dialog box. We recommend disabling this option. In this case, workflows without a form template are shown in the *Tasks* work area in a standard form and can be processed there.

Related functions

- Return workflow
- Delegate workflow
- Hand off workflow
- Postpone workflow

Example

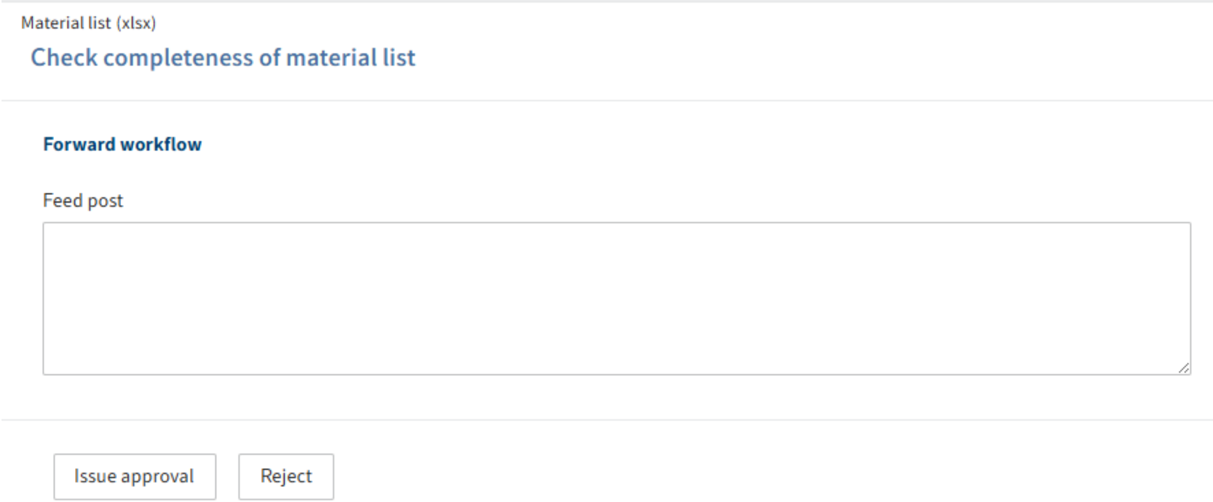
You received a workflow with a material list to review.

Method

1. Open the *Tasks* work area.

2. Select the workflow that you want to forward.

3. In the viewer pane, switch to the *Form* tab.



Optional: Enter a message or instruction for the next user in the feed post.

4. Select either *Approve* or *Reject*.

Result

The workflow is forwarded and disappears from your tasks area.

Search entries

You can search for documents and folders. The more information you enter about the entry you are looking for, the better the result will be.

This chapter describes an example of a search. You will find descriptions of the interface and all search options in the chapters 'Search' work area and 'Search' tab.

Related functions

- Search with ELO Click OCR
- Search metadata

Example

You want to search for a document. You know

- which folder the document is in,
- that it is not an e-mail,
- that the document was filed in 2020 or 2021, and
- that the title of the document contains the words 'ideas' or 'project'.

Method

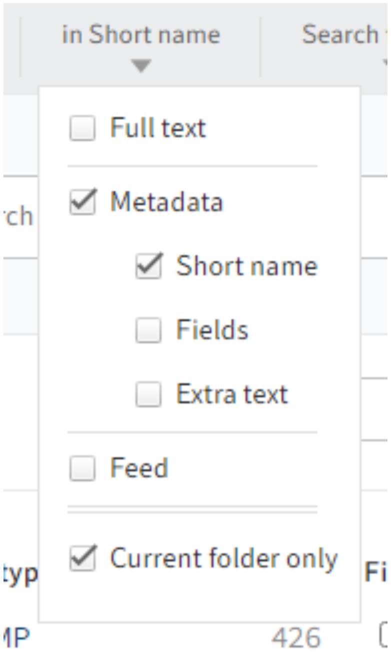
1. Select the folder that contains the document in the *Repository* work area.

2. Navigate to the *Search* work area.

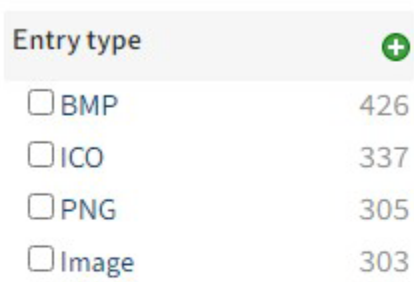
3.

On the ribbon, select *in all areas*.

4. Select the *Current folder only* check box to limit the search to the folder you just selected.

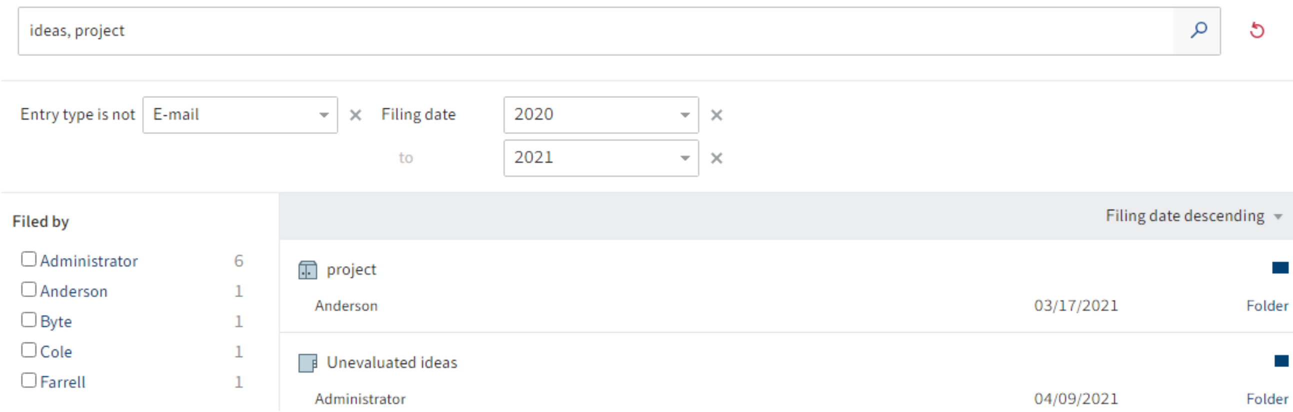


5. Uncheck the boxes next to *Full text*, *Fields*, *Extra text*, and *Feed*. This way, the search is restricted to the title of the document, i.e. the *Short name*.



6. Click the facet *Entry type*. The facet is now negated.
7. Enable the *E-mail* entry type. This excludes all entries of the type *E-mail* from your search.
8. Select the years 2020 and 2021 under the *Filing date* facet.
9. Enter `ideas, project` in the search field.
10. Select *Search* (magnifying glass icon).

Result

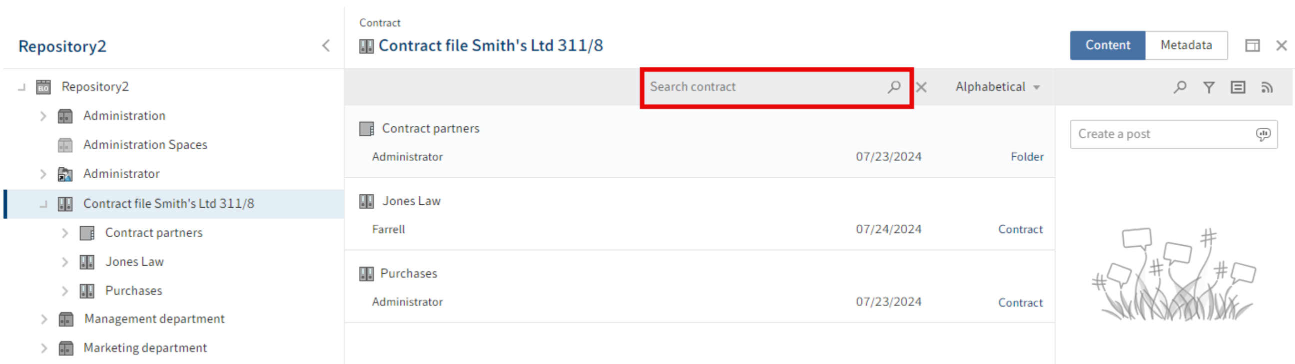


The search is performed.

Outlook

- To view an entry in the results list, select the entry.
- To go to the filing location of the entry, select the entry. On the ribbon, select *View > Go to*.

Search a business object



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

Search with ELO Click OCR

You can mark terms in documents and search all entries for the selected term using ELO Click OCR.

ELO Click OCR works on TIF documents and in the image preview (*Ribbon > View > Image preview*).

The following options are available for using ELO Click OCR:

- Start a search in the *Repository* work area
- Start a search in the *Search* work area

Start a search in the 'Repository' work area

You can start the search in the *Repository* work area and are directed to the search from there.

Method

1. Select the document you want to use for the search.
2. Press and hold the CTRL + ALT keys. In the viewer pane, box in the terms in the document that you want to use for the search using the left mouse button.
3. Release.

You are directed to the *Search* work area. The selected terms are now in the search field.

To get the search results, select *Search*.

Start a search in the 'Search' work area

In the *Search* work area, you can select a document you want to start a search on.

Method

1. Select the document you want to use for the search.
2. Select the search field of ELO iSearch.
3. Hold down the CTRL key. In the viewer pane, box in the terms in the document that you want to use for the search.
4. Release.

> **Information**
>
> If you want to transfer multiple terms after another, select each individual term using the left mouse button while holding CTRL + SHIFT. Release the mouse button after each term. Repeat the process until you have transferred all desired terms.

The selected terms are now in the search field.

To get the search results, select *Search*.

Assign substitute

Substitutions ensure that your tasks are completed even if you do not have access to ELO for a longer period of time.

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

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

Method

1. On the ribbon, select *User menu [your name] > Assign substitute*.

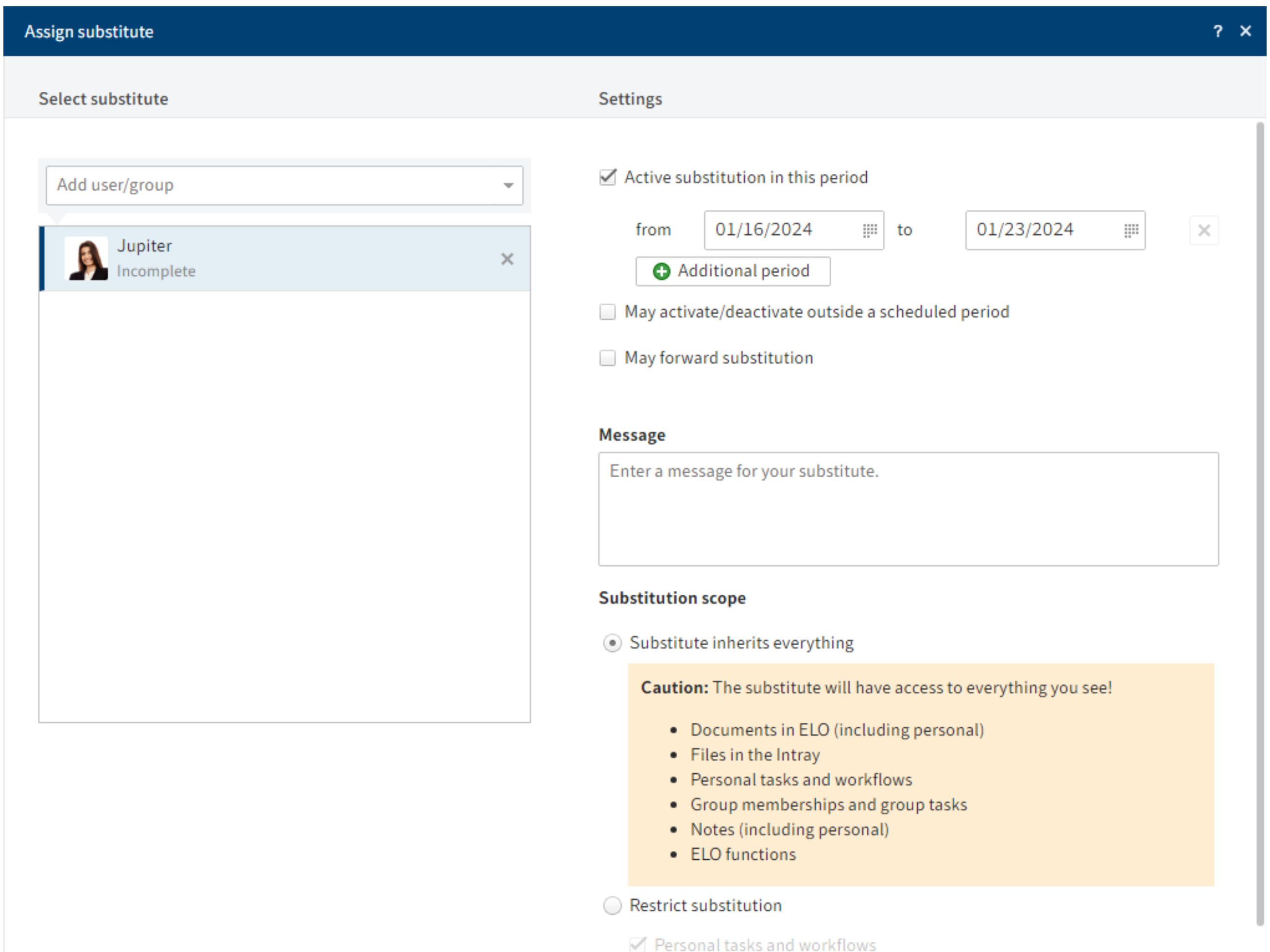
2. Select your substitute using the input field or from the drop-down menu.

   You can be substituted for by other users or by groups.

   As long as you haven't configured any settings for a substitute, their status will be *Incomplete*. With this status, the substitute cannot be used. You can configure settings either right away or later on.

   You can configure different settings for different substitutes. For example, you can plan your substitutions in advance and edit their settings after the fact.

3. To configure more exact settings, tap one of the users or groups with substitution rights.



Settings

The following options are available for assigning a substitute:

- Period: You can set a period during which another user automatically acts as your substitute.
-

Substitution rights: This gives another user the right to substitute for you. In this case, they have to activate and deactivate substitution themselves.

Period: The *Active substitution in this period* option enables the input fields for the period. If you disable option, the input fields are disabled. Entered periods are retained and can be reactivated later on.

You can define the following periods:

- A definite period with a start and end
- An unlimited period with a start
- Multiple definite and/or unlimited periods

Information

You can add a time to the selected date. Enter the time after the date in the following format: `2023-12-29 15:30`.

If you have defined a substitution with an unlimited period, you can end the substitution by deleting the period with the X icon.

Information

Periods are not deleted automatically; you have to delete them by selecting the X icon.

Substitution rights: If you enable the *May activate/deactivate outside a scheduled period* option, the substitute is allowed to activate or deactivate the substitution. This gives them permission to substitute for you in general without you defining a substitution period.

May forward substitution

Substitutions are not forwarded automatically.

This means: Cole has appointed Anderson as his substitute. In turn, Anderson appoints a different user as her substitute. This user does not receive the tasks, rights, etc. that Anderson is given as substitute for Cole.

Enabling the option *May forward substitution* allows your substitute to pass on the substitution to another user.

Even in this case, the substitution is not forwarded automatically – the user has to forward it actively.

Please note

Use this option with caution to prevent rights from being forwarded unintentionally within the company.

Substitution scope

You can individually configure how many rights you want to give your substitutes.

Substitute inherits everything: Your substitute can see everything that you see.

Restrict substitution: You decide what your substitute is allowed to see.

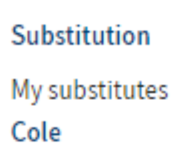
You must enable at least one of the following three options:

- Personal tasks and workflows: If you enable this option, your substitute can access tasks and workflows that you have been assigned personally, not those given to you as a member of a group. The substitute requires the *Extend workflow rights* user right in order to be able to view the documents associated with a task. This user right can only be granted by an administrator.
- Intray access: If you enable this option, your substitute has access to your Intray. The Intray is only available in the ELO Java Client.
- Inherit group membership: Use the drop-down menu to select which of your groups the substitution applies to. The substitute is assigned the user rights, permissions to entries, annotations, feed entries, and group tasks associated with the group. This allows you to create multiple substitutes for the same period and allocate permissions for different groups. Only the groups that allow substitution are available for selection.

Result

You have set up a substitution. If the substitution period has already begun, the substitution is already active. Otherwise, the substitution will become active when the defined start date is reached or the authorized user activates the substitution.

If you are currently being substituted for, you will recognize this by the orange person next to your *Profile menu [your name]*.



You will also see on your *My ELO* start screen that you are being substituted for.

Outlook

A substitution ends

- at the end of the defined period, or
- if the user substituting for you ends the substitution.

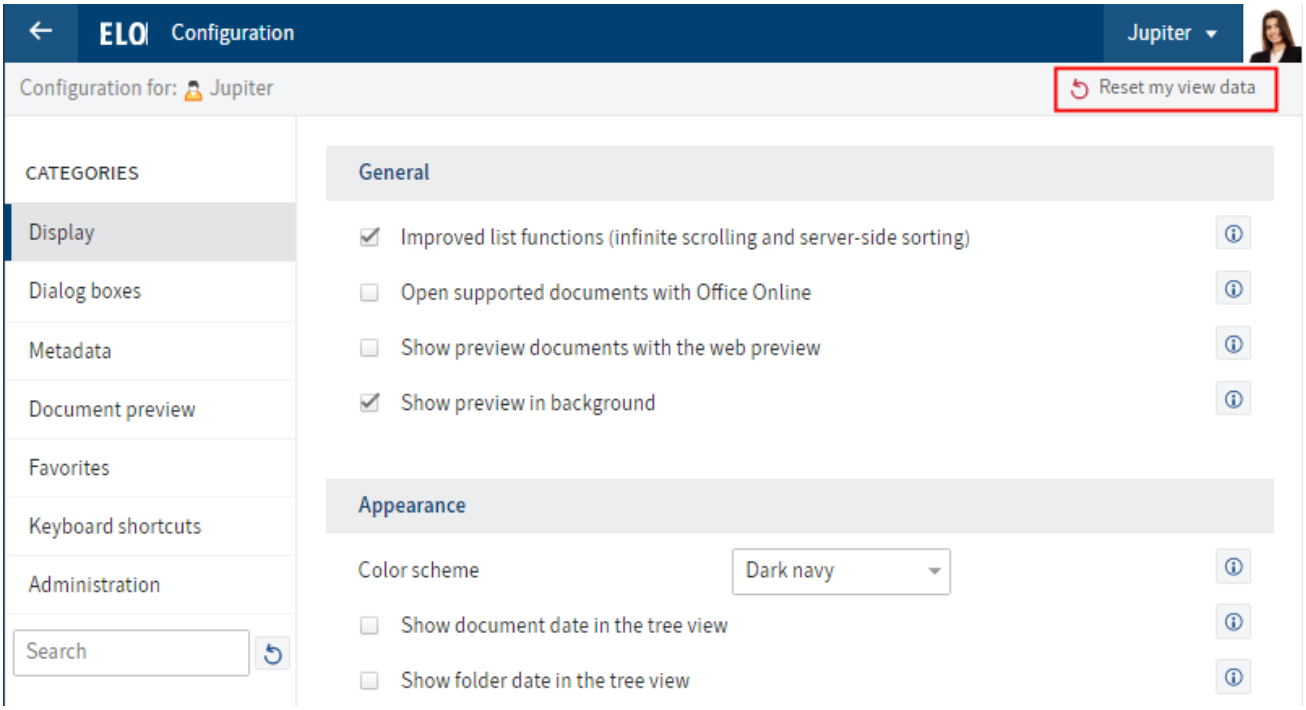
You can learn how to accept a substitution in the chapter Accept substitution.

User menu [your name]

Configuration

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

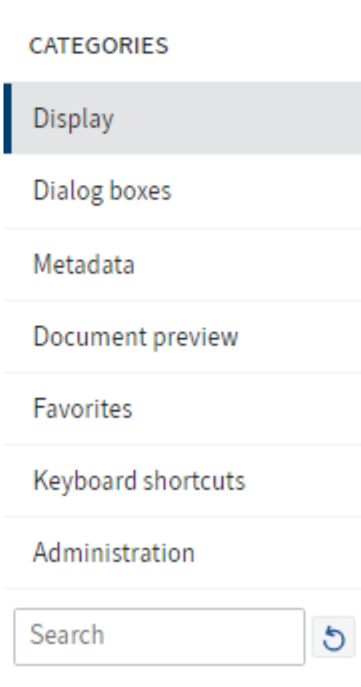
You can change the settings in the configuration.



The following option is available in the upper bar:

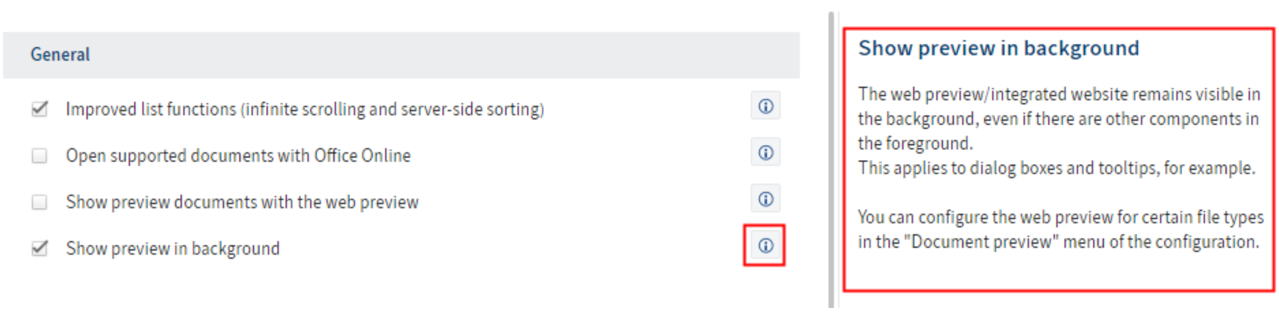
Reset my view data: Using this function, you restore the default values for your account. The view data includes table settings, window sizes, and positions.

Categories



The configuration is split into categories, which you will find on the left side.

If you want to search for a specific setting, use the search field under the categories.



There is an *i* next to each setting.

The *i* opens additional information about the setting.

Enable roles

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

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.

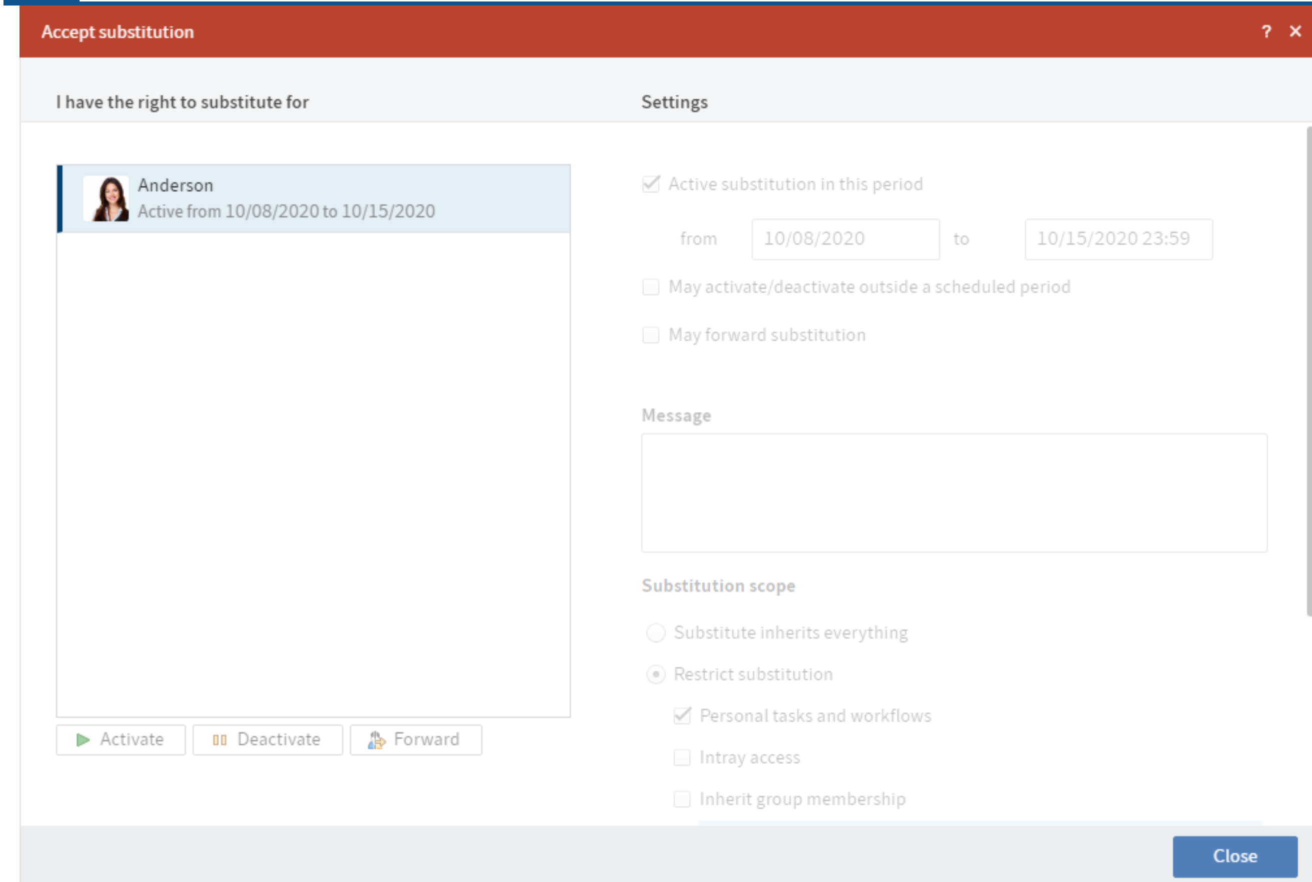
Assign substitute

To learn how to appoint a substitute, refer to the Assign substitute chapter.

Accept substitution

On the ribbon, select *User menu [your name] > Accept substitution*. In the dialog box, you can see who you are currently substituting for or may substitute for. The following options are available for accepting substitution:

- Period: Another user has defined a period during which you automatically accept their substitution.
- Substitution rights: Another user has given you the right to substitute for them. In this case, you have to activate the substitution yourself.



I have the right to substitute for

On the left-hand side, you will see an overview of the users you have permission to substitute for.

> **Information**
>
> If you are a supervisor of other users, you automatically have the right to substitute for these users. Users for whom you are a supervisor are not automatically displayed in the overview. Select a user from the *Add employee* drop-down field. The *Add employee* field is only displayed if you have been assigned the role of supervisor.

You will recognize active substitutions by a green bar to the left of the profile picture.

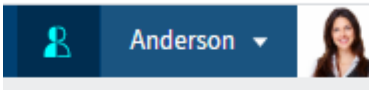
If you select a user, their exact substitute permissions are shown on the right-hand pane. This area is for information purposes only and cannot be edited.

Edit substitutions

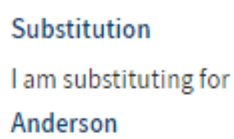
You have the following options:

- Activate/Deactivate: These buttons allow you to activate substitutions that are currently inactive or deactivate active substitutions you want to end. These buttons are only available if the user you want to substitute for has given you the right to activate and deactivate the substitution yourself.

- Forward: With these buttons, you can forward a substitution if the user you are substituting for has given you the corresponding right. You can either hand off the substitution entirely or appoint an additional substitute.



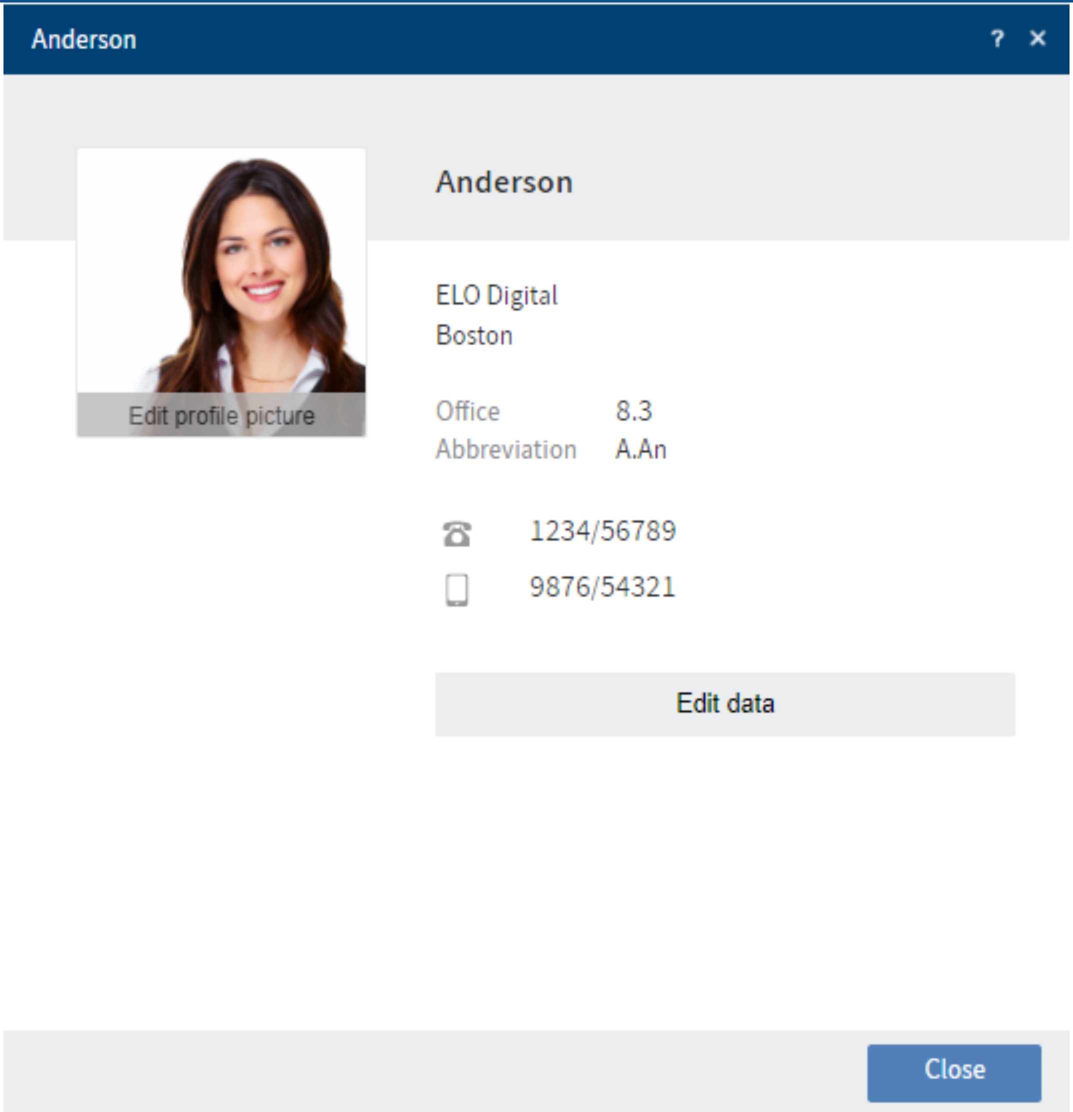
If you are currently substituting for another user, you will recognize this by the blue person next to your *User menu [your name]*.



You will also see on your *My ELO* home screen that you are substituting for another user.

Edit profile

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



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 select your name or profile picture in the feed.

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 have the exact version when errors occur in your program.

ELO help

Available in: *User menu [your name] > ELO help*

This function opens the documentation for the ELO Web Client in your browser. If you need information about a specific dialog box, select the question mark next to the X icon in the dialog box.

Log off

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

This where you log off from ELO.

Workspaces

Workspaces are workspaces in ELO for different functional levels. With the help of filters and different views, you can edit data and analyze it in charts and tables.

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

You can find more information about workspace types in the ELO Workspaces documentation.

Objects

An object (business object) is a special type of folder that helps organize contents into regions. You will find more information here:

- Important components > Business object
- Table
- Kanban board

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

The Create object section explains how to create an object.

Relations

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

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

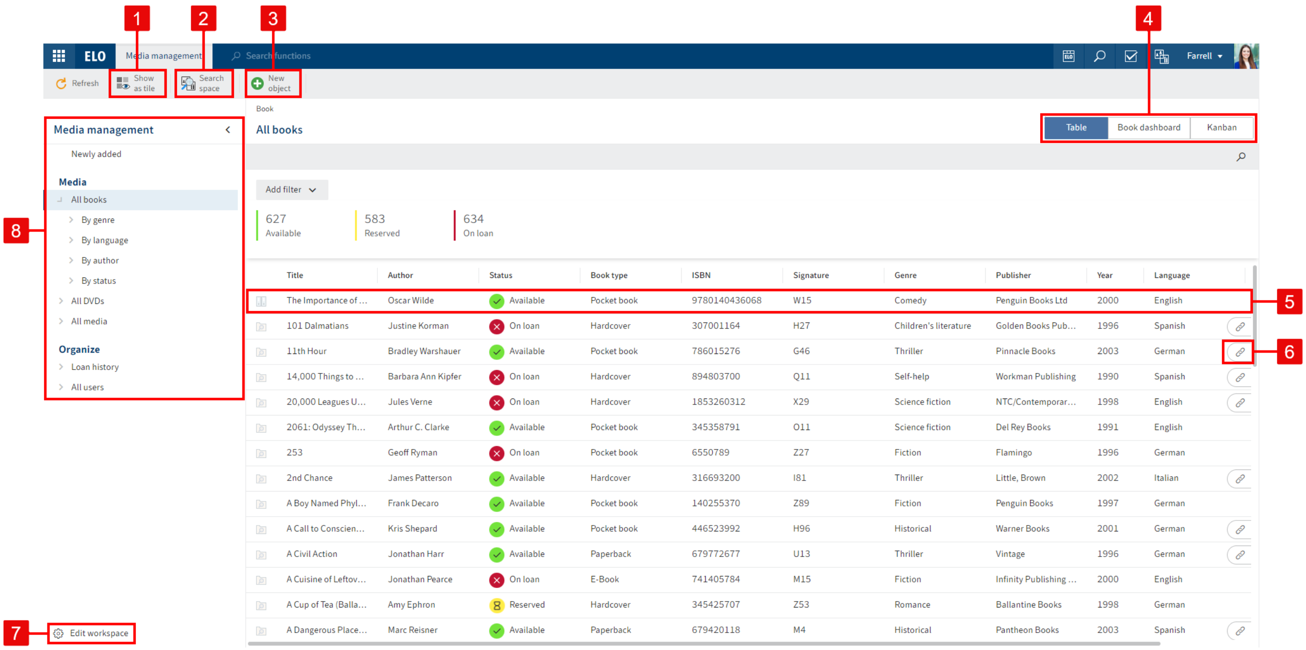
In the table view, a relation is indicated by a flyout (button with a chain icon).

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

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

Workspace home screen

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



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

You have the following options:

1 Show as tile: You can create a tile in *My ELO* that provides quick access to the workspace.

2 Search space: You can search the entries of the selected space. Refer to the chapter on Filters for a more detailed description of the search.

3 Create new object: You can create an object. For more information, refer to the Create object and Objects sections.

4 Switch view: If multiple views have been created for a workspace, you can use the tabs to switch between views. There are tables, kanban boards, dashboards, and calendar tabs. The tabs are named and visibility is set by the administrator. These settings are customizable.

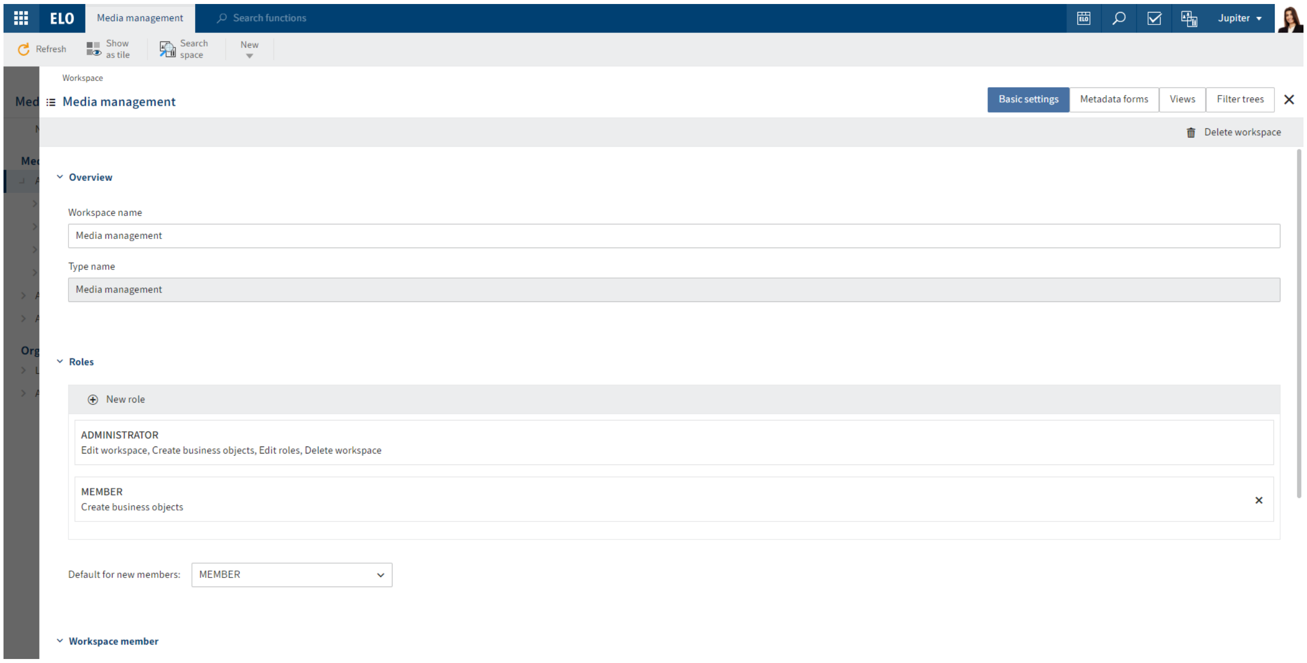
5 Show entry

6 Select relation: You can open entries that are related to the selected entry.

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

8 Workspace filter tree: You can switch between the workspace filters. Filters can be single or multi-tier.

Edit workspace



You can edit the workspace here. In the ELO Workspaces documentation, you can find more information about the following:

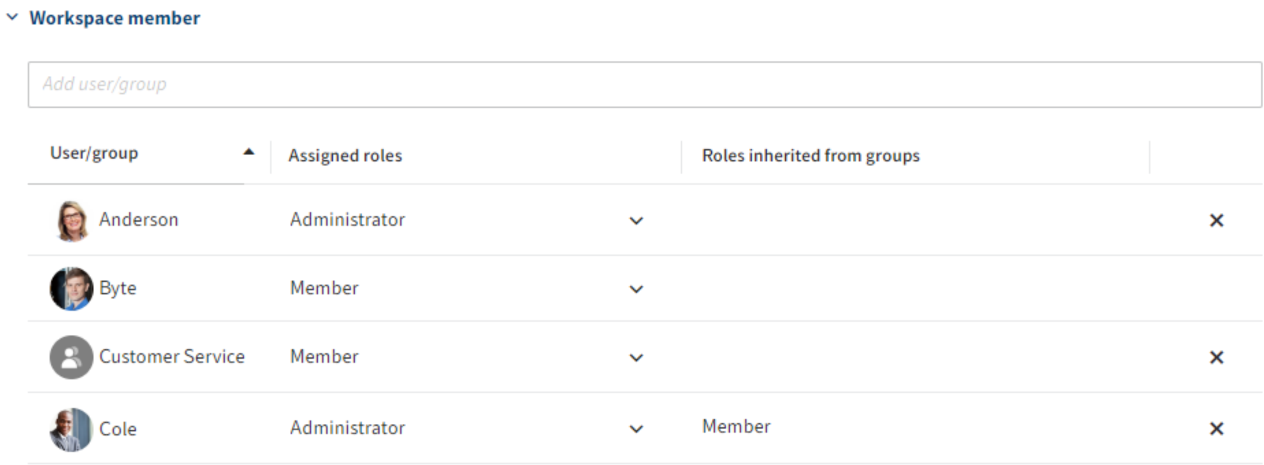
- Overview
- Roles
- Permitted metadata forms
- Views
- Filter trees

Please note

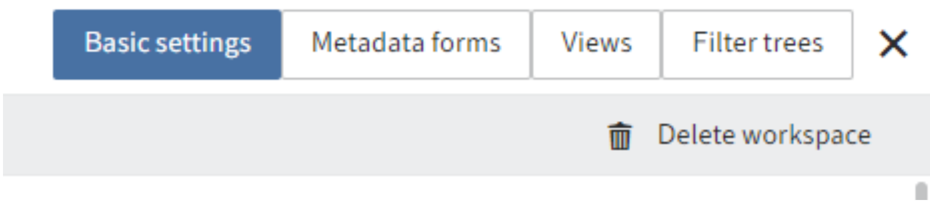
When you edit the settings in one area, it is no longer linked to the corresponding area of the workspace type. Changes to the workspace type are therefore no longer automatically applied to this area in the workspace.

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

The following options are only available in the workspace:



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



You can delete the workspace.

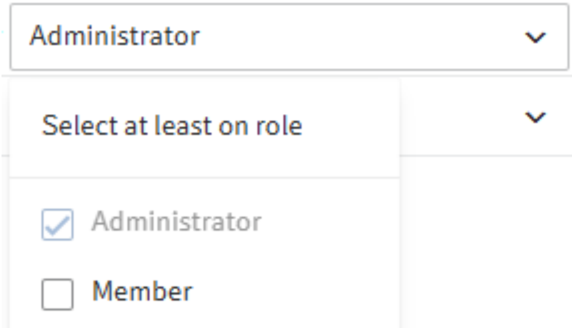
'Workspace members' area

You have the following options:

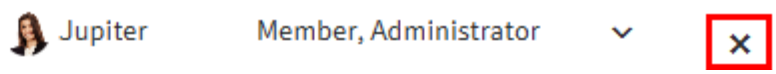
You can add members and groups to the workspace. If you add groups, all members of the group are granted the role set for the group.

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

> **Please note**
>
> New members need to restart ELO to access the space.

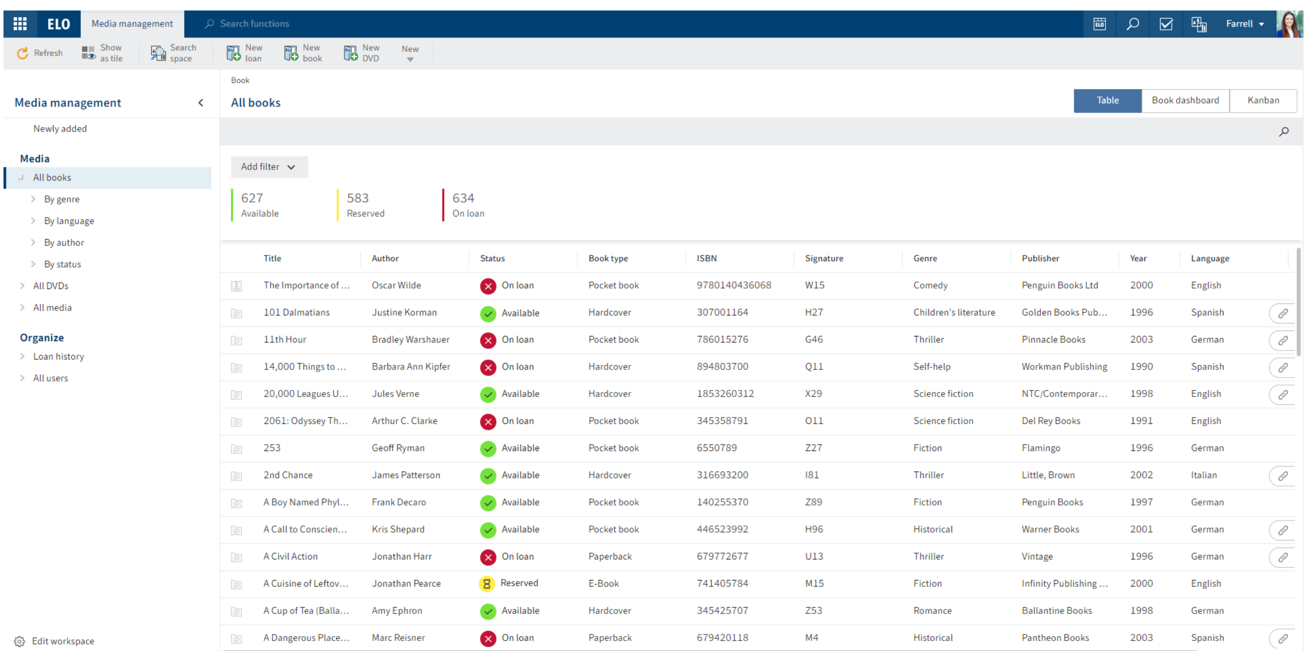


You can change the role of workspace members with the drop-down menu. Workspace members can have multiple roles. If workspace members belong to a group that has been added to the workspace, they are also granted the roles that the group has in the workspace.



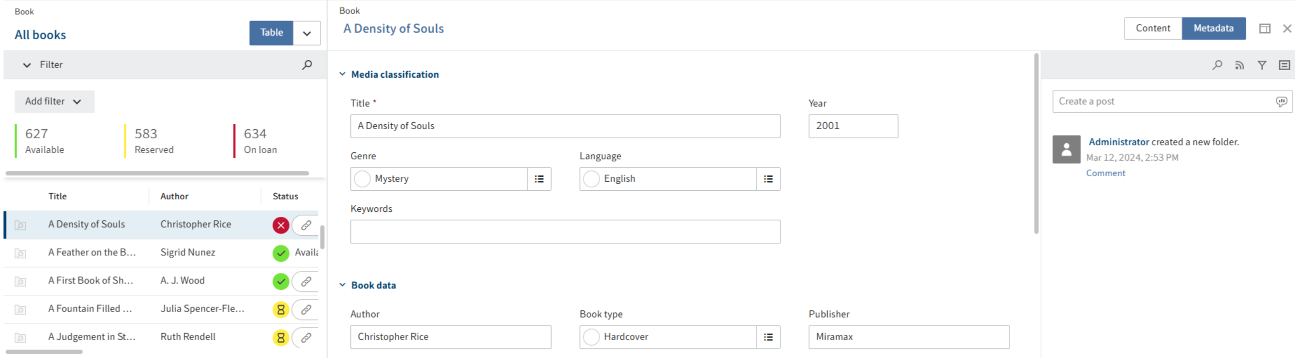
You can delete workspace members. Administrators can only be deleted by administrators. The last administrator cannot be deleted.

Table

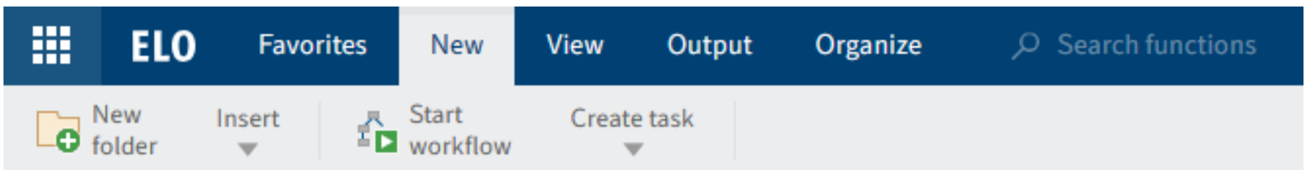


In a table, you see all the entries that match the selected filters. The selection of filters is based on the workspace type.

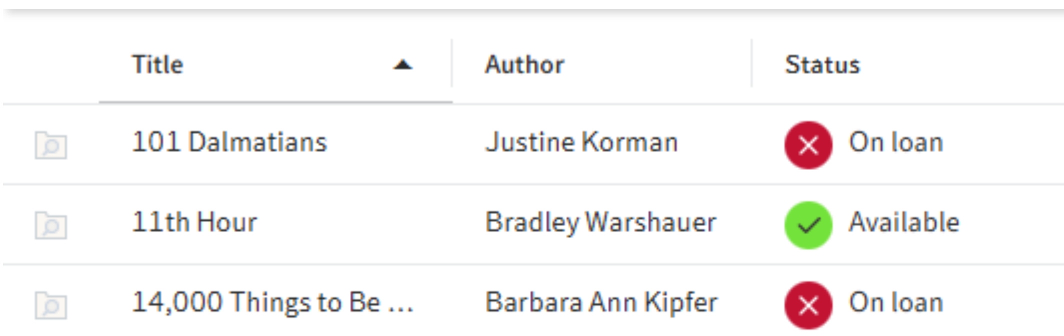
You have the following options:



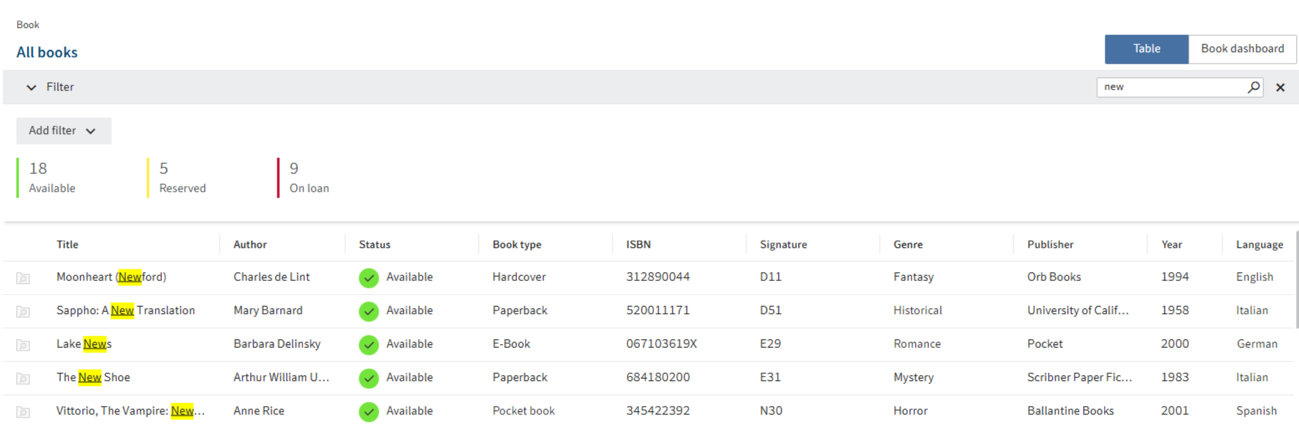
You can open the entries. The entry is shown and you can edit it on the *Metadata* tab. You can insert documents and folders for an entry and open them on the *Content* tab. This area works like the viewer pane in the repository.



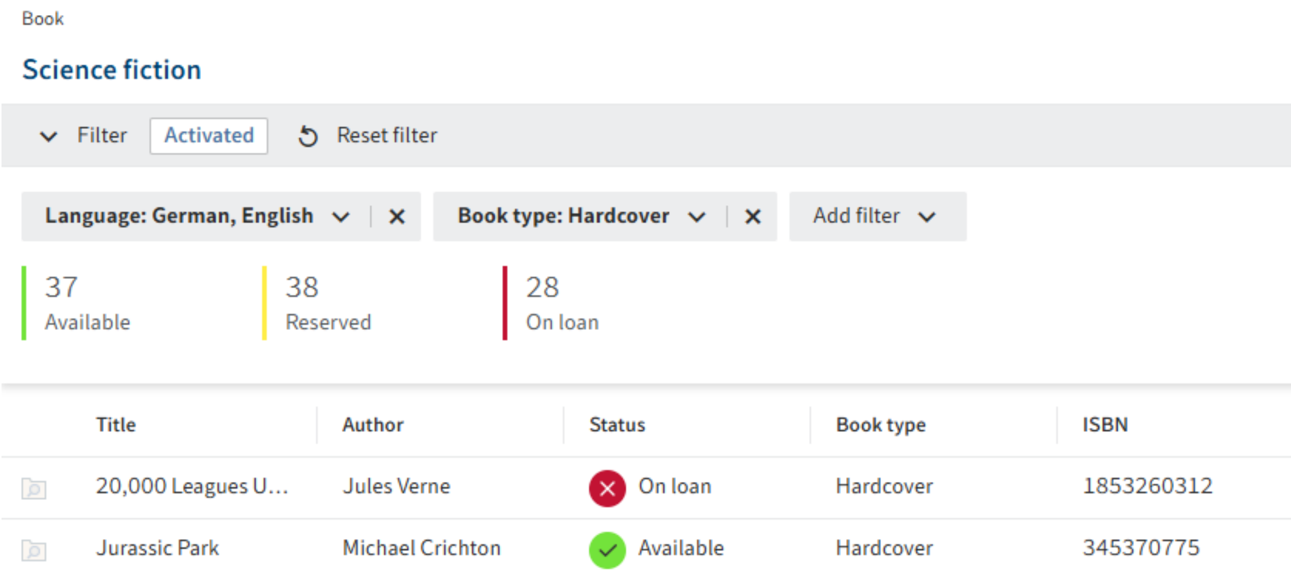
You can edit the entries using the functions on the ribbon. You can also use the context menu for documents and folders associated with an entry.



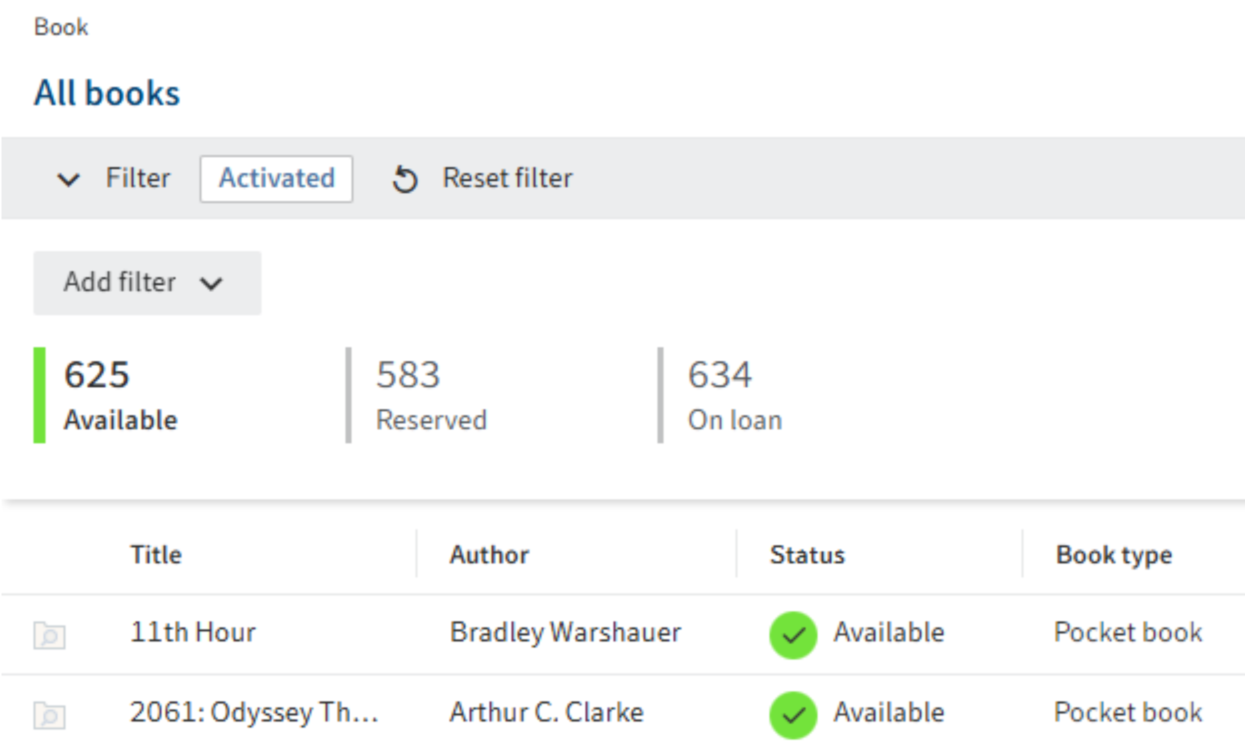
You can sort the filtered entries in the table by clicking on the column header.



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



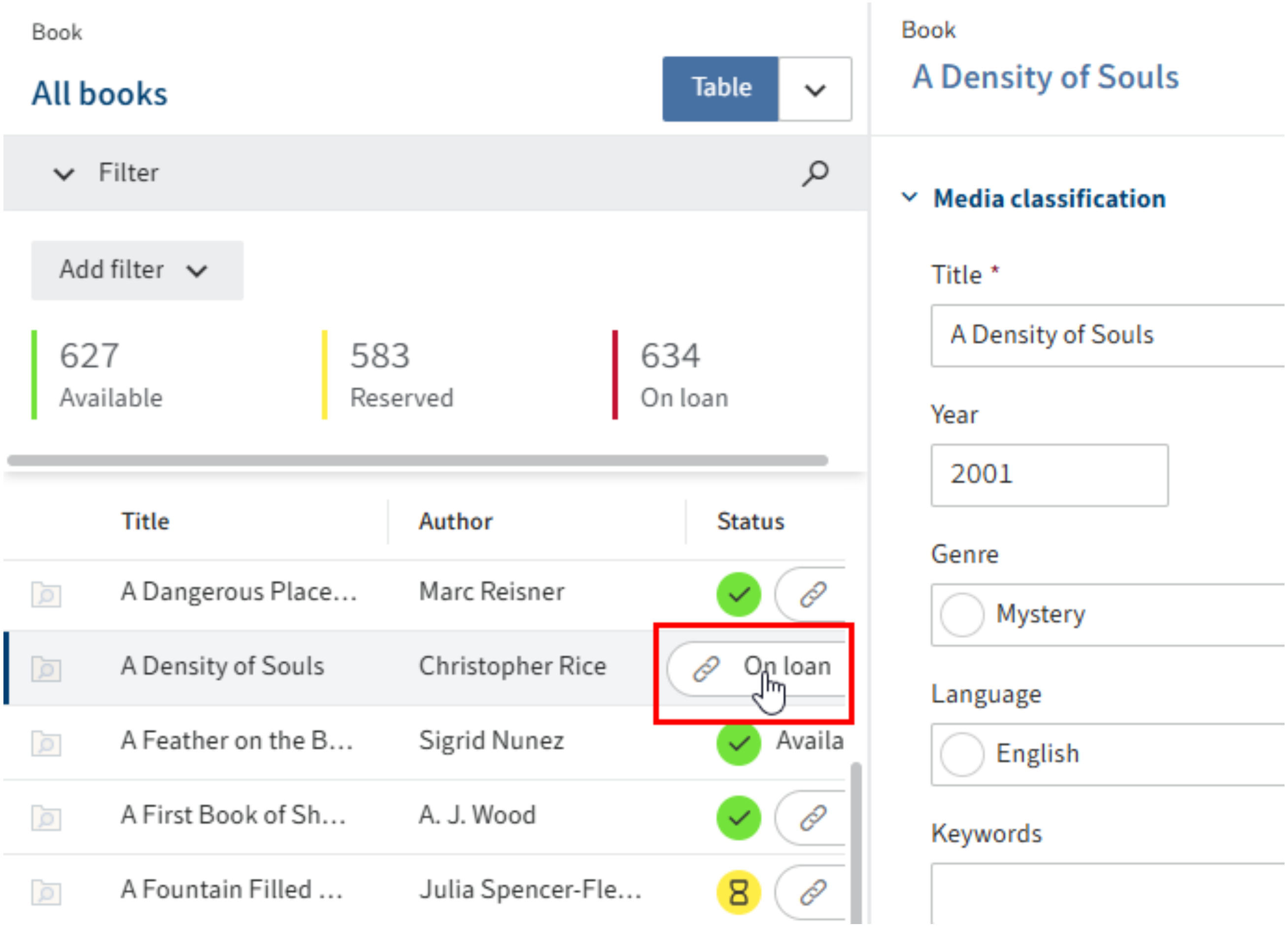
You can set quick filters to filter entries. The quick filters also remain active in other filter levels after restarting ELO as well as in other ELO clients.



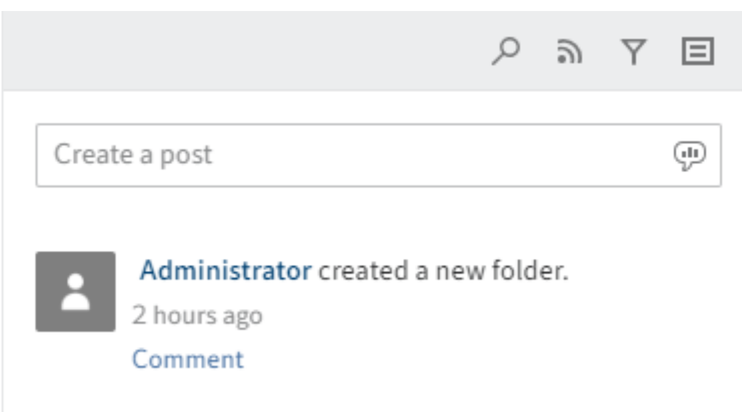
Status filters show the number of entries for each status, giving you a quick overview of your data. You can enable one or multiple status filters.

Status filters are created by the administrator.

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

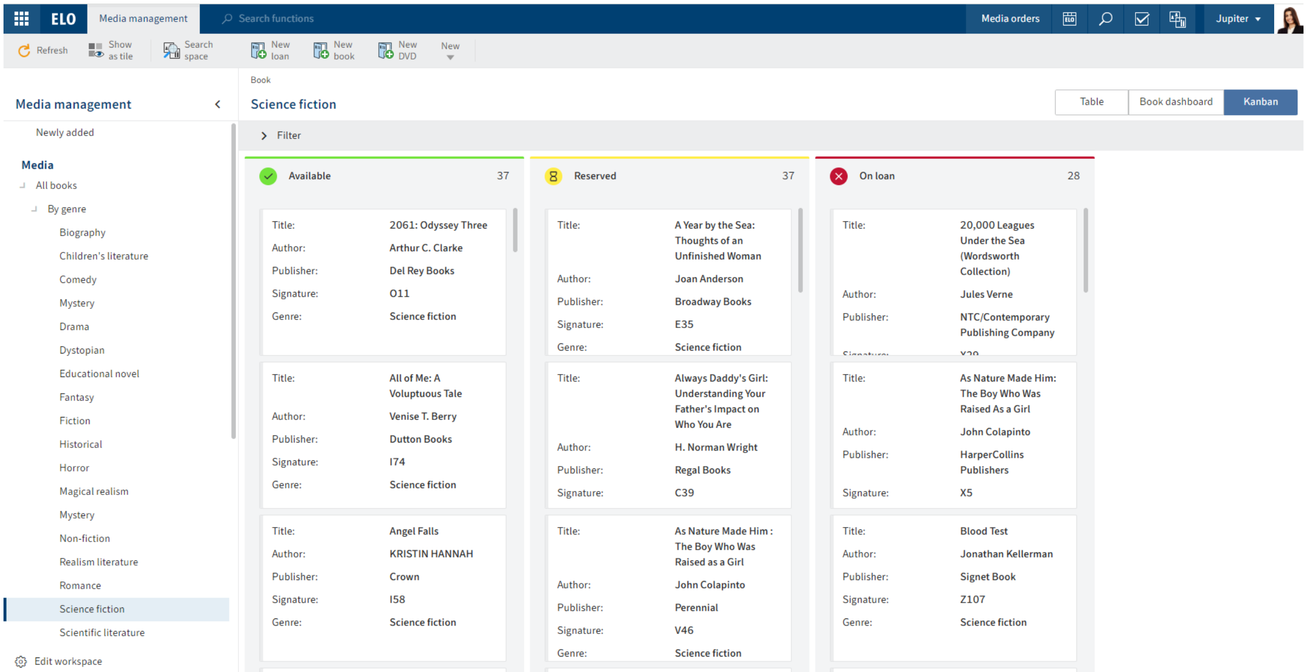


You can use flyouts to open entries that are related to the selected entry. The metadata of the entry has to contain a relation field that establishes the link. If multiple relations exist for an entry, you can open one of the associated entries using the drop-down menu in the flyout.



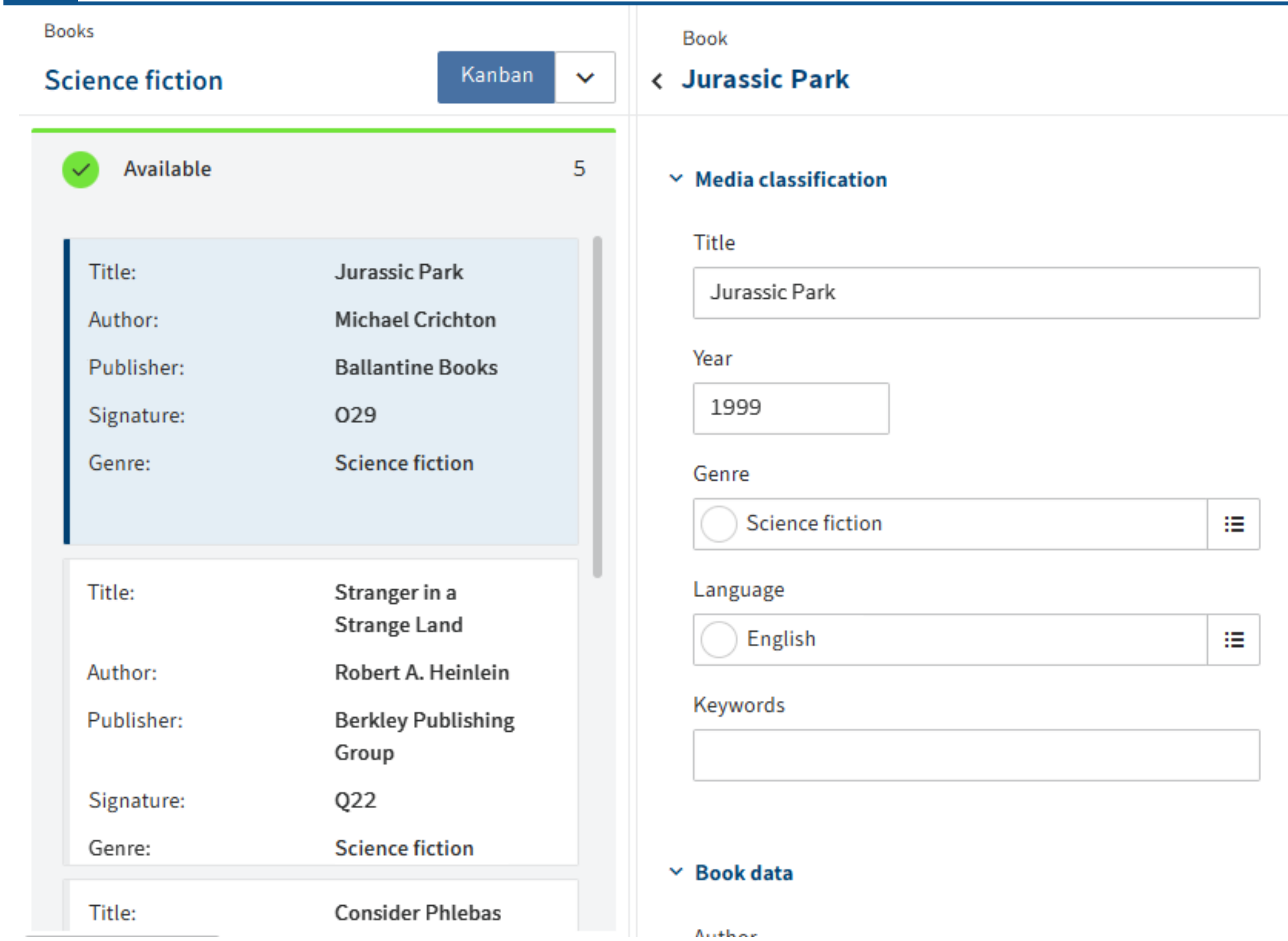
You can enter a feed post. The feed works as described in the chapter Feed.

Kanban board

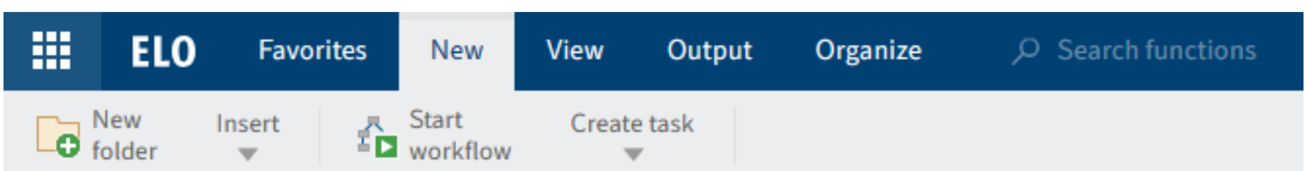


In a kanban board, entries are assigned to columns depending on the value of a specific status field.

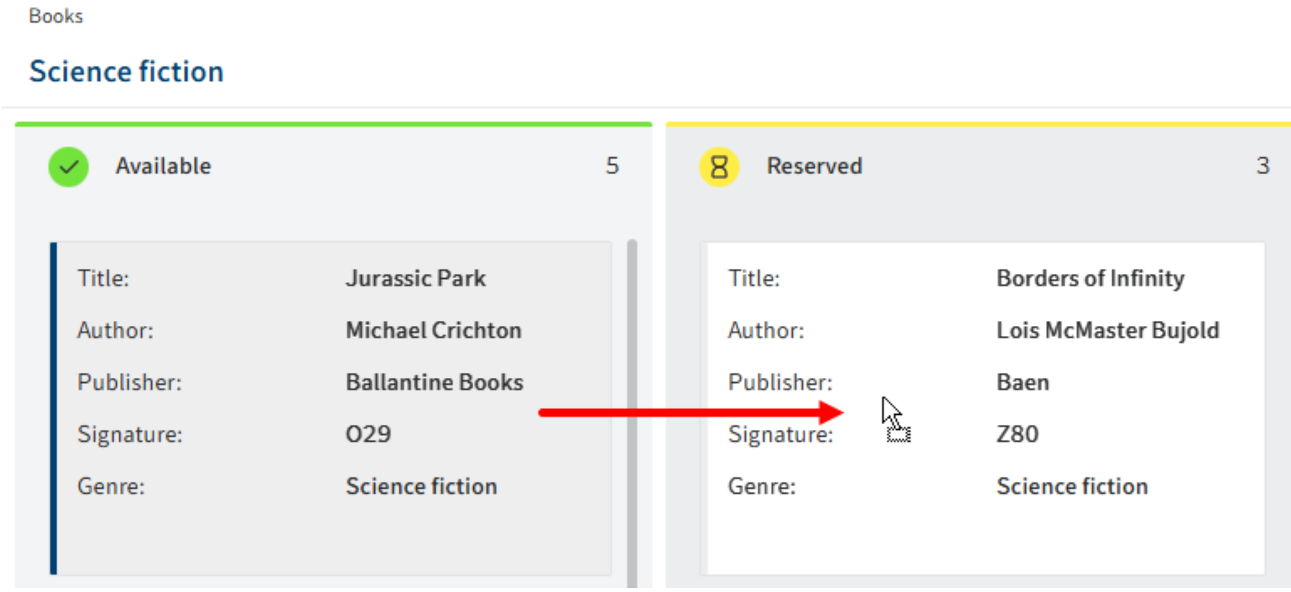
You have the following options:



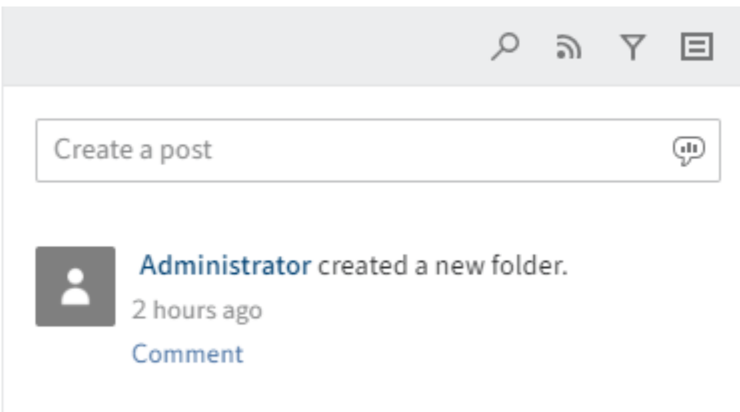
You can open the entries. The entry is shown and you can edit it on the *Metadata* tab. You can insert documents and folders for an entry and open them on the *Content* tab. This area works like the viewer pane in the repository.



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

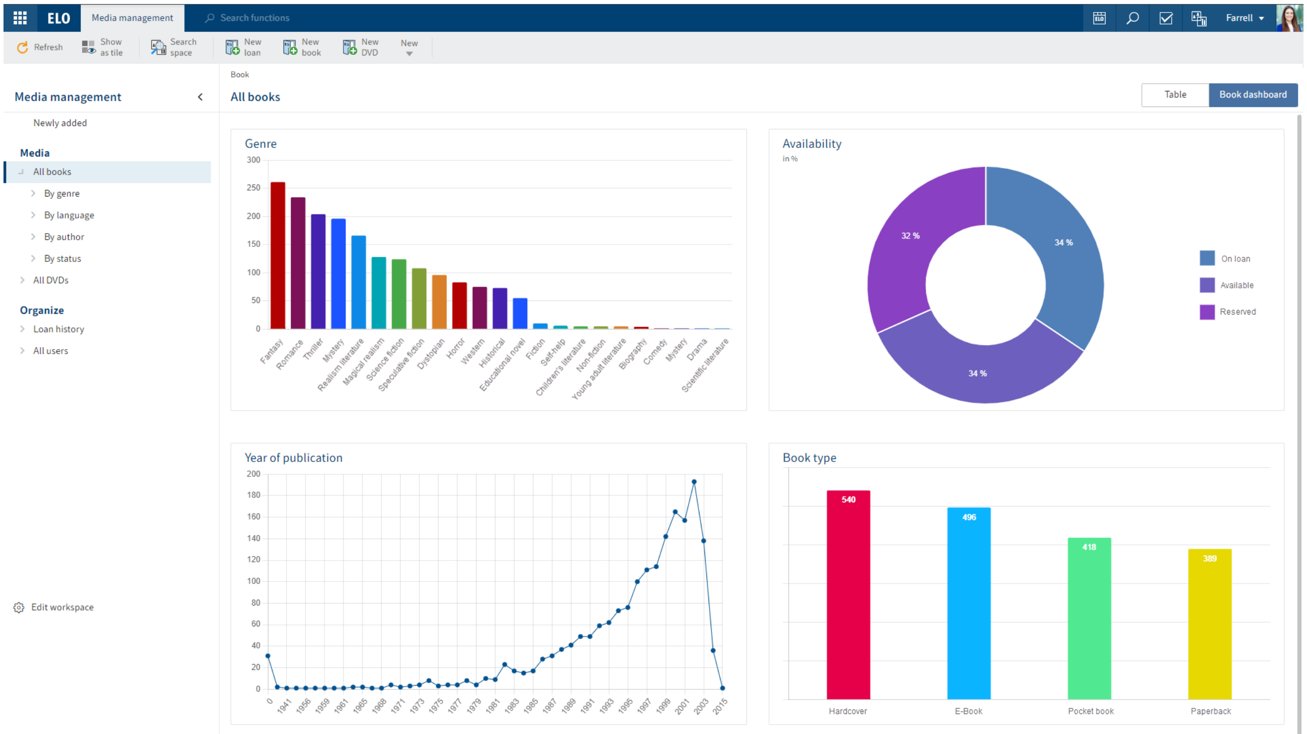


You can move entries via drag-and-drop. The corresponding value in the metadata changes.



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

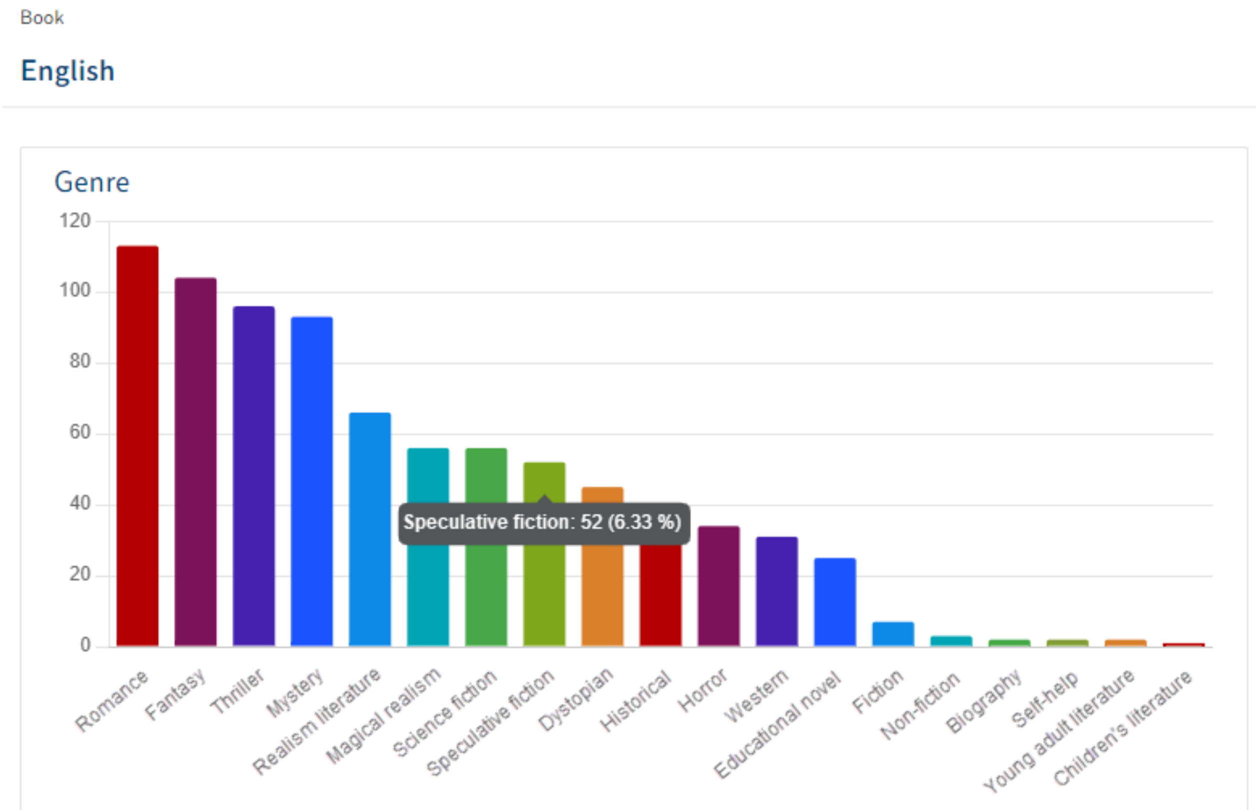
Dashboard



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

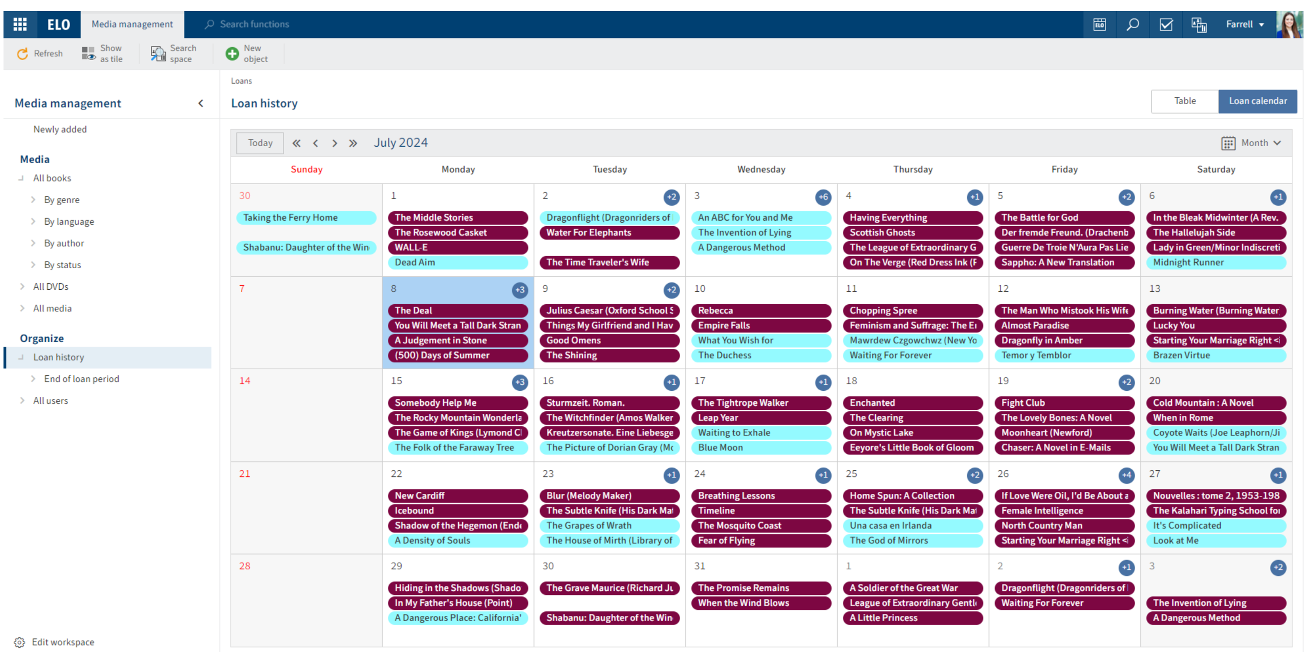
You have the following options:

You can filter the dashboards.



You can view details about dashboards by clicking on them.

Calendar



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

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

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

Create workspace

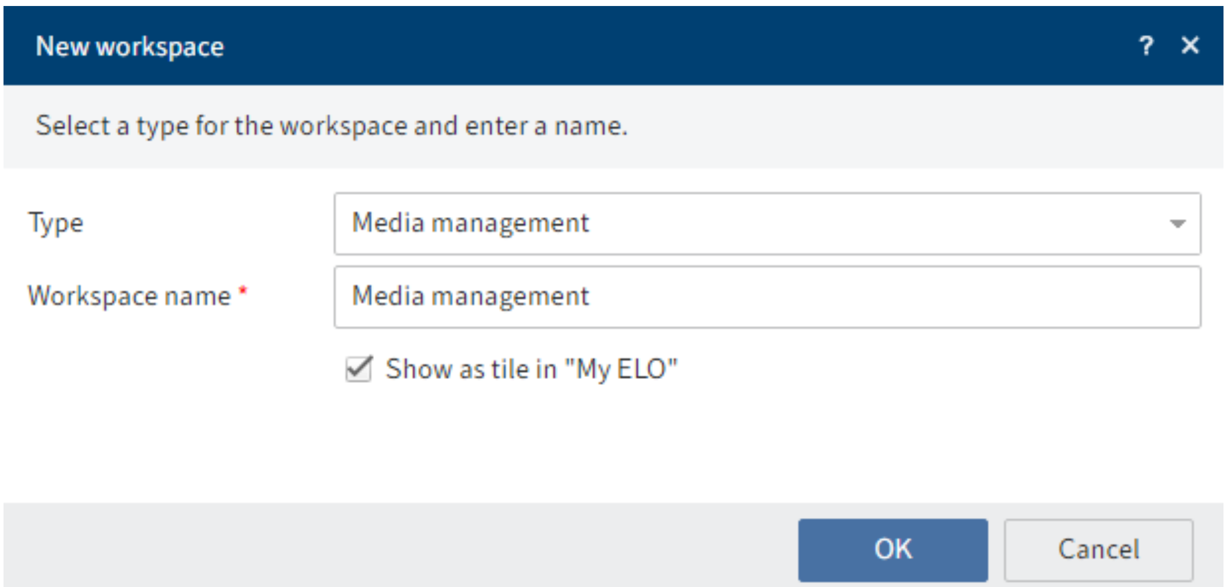
You can create new workspaces.

Requirements

The administrator will already have created workspace types.

Method

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



3. In the *New workspace* dialog box, select the type you want to base the workspace on.
4. Enter a meaningful workspace name.

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

Result

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

Outlook

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

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

Create object

You can create objects.

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

Requirements

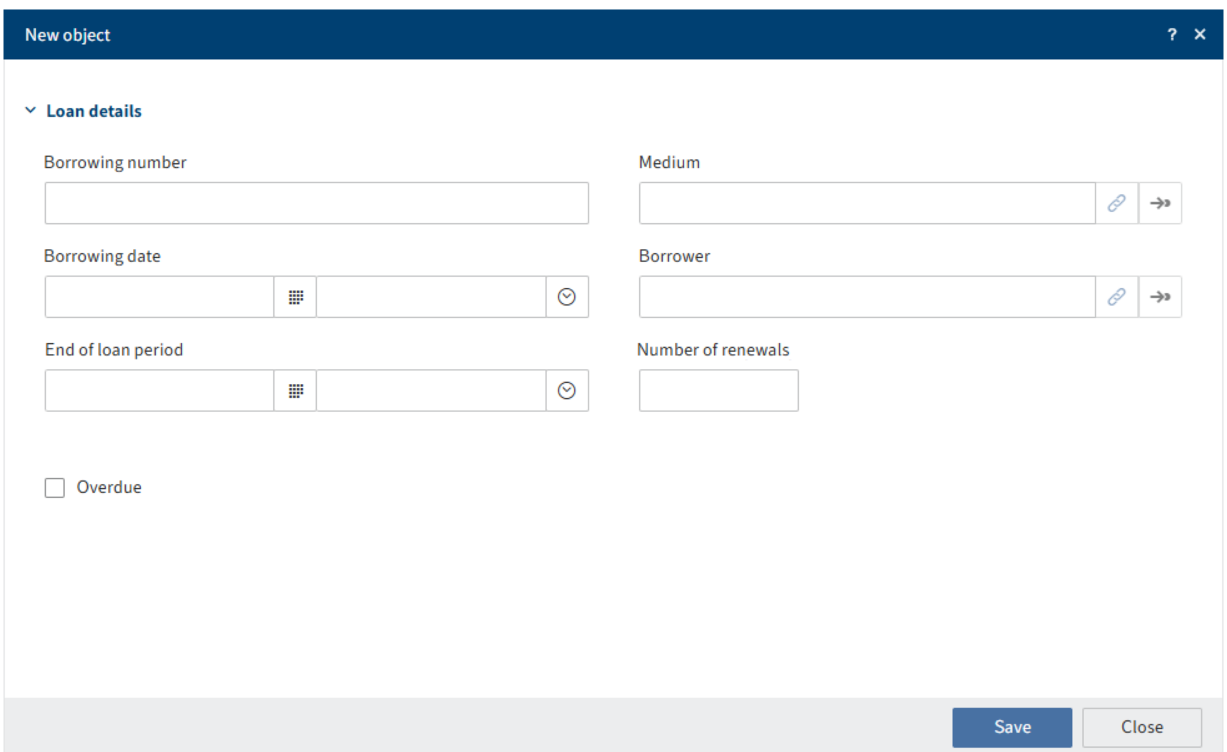
- The administrator has configured the functions for the workspace type.
- Your role has permission to the functions.

Method

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

2. Open a workspace.

3. On the ribbon, go to the tab with the workspace functions and select the corresponding function. The administrator has configured which object types are possible for each workspace.



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

4. Complete the fields as required.

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

5. Select *Save*.

Result

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

Outlook

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

- Workspace home screen
- Table
- Kanban board
- Dashboard

Teamspaces

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

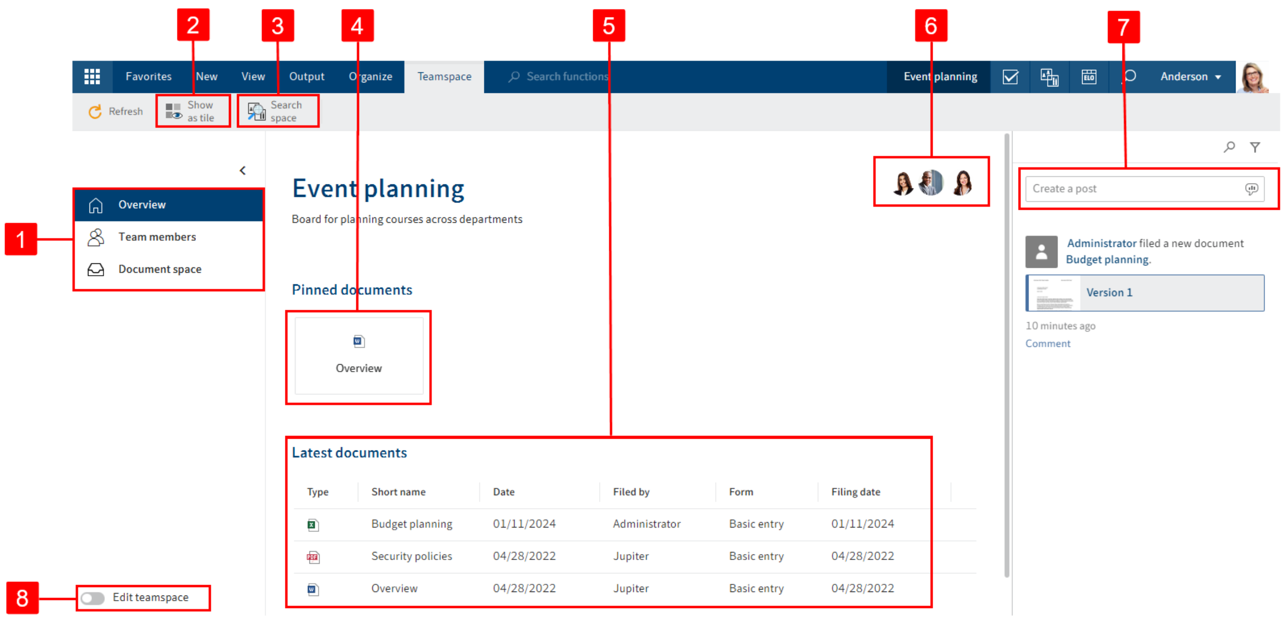
The permissions you have in a teamspace depend on the role you have been assigned by the administrator.

Workspaces can be integrated into a teamspace.

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

'Overview' area

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



You have the following options:

1 Teamspace areas: You can navigate between areas in a teamspace. Every teamspace has the areas Overview and Team members. The names and number of additional areas are customized.

2 Show as tile: You can create a tile in *My ELO* that provides quick access to the teamspace.

3 Search entries in teamspace: Refer to the Filters section for a more detailed description of the search.

4 Pinned documents: You can open a pinned document or unpin a document from this space. The Document space section explains how to pin a document in a teamspace.

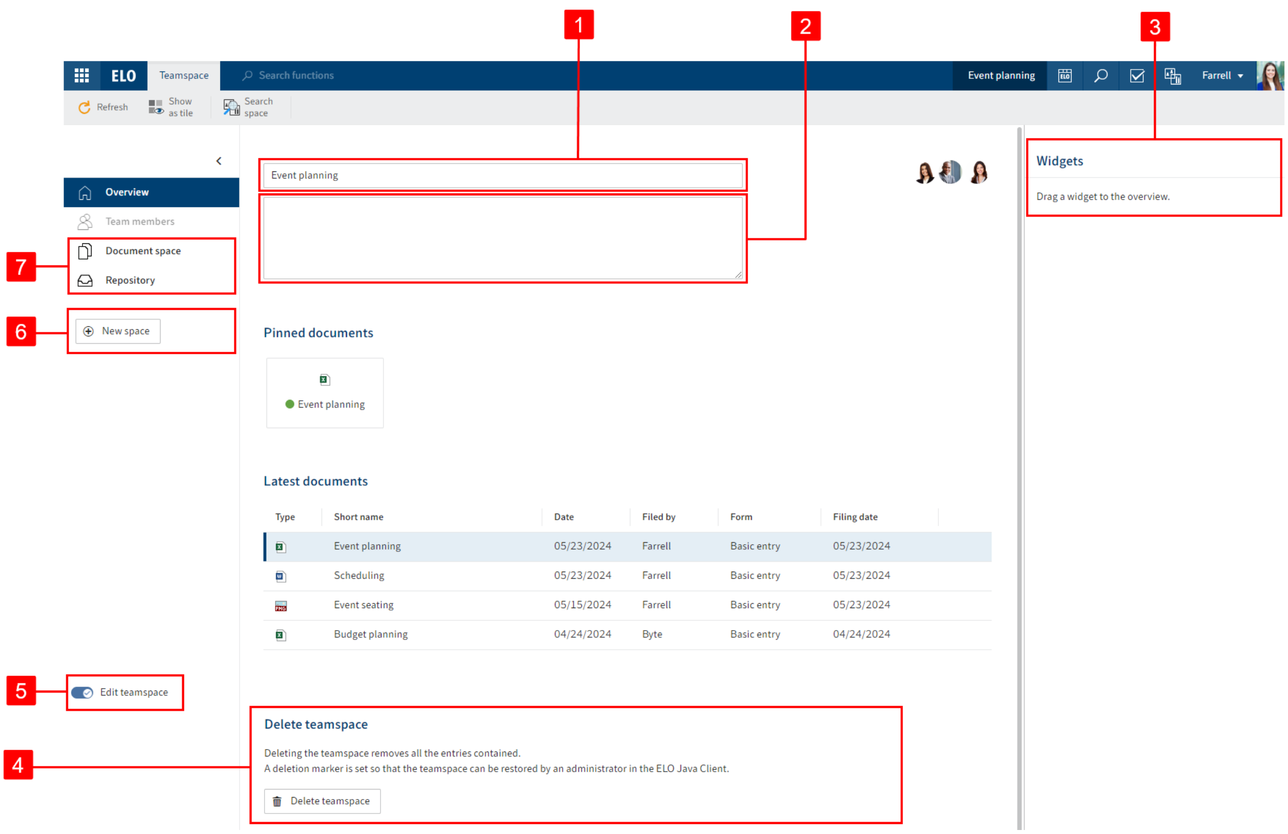
5 Latest documents. You can open one of the latest documents. The Document space section explains how to insert a document in a teamspace.

6 Overview of team members: You can see the members of the teamspace and navigate to the *Team members* area by selecting a member. You can only edit members in the 'Team members' area.

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

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

Edit teamspace



You have the following options:

1 Change the teamspace name

2 Change the teamspace description

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

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

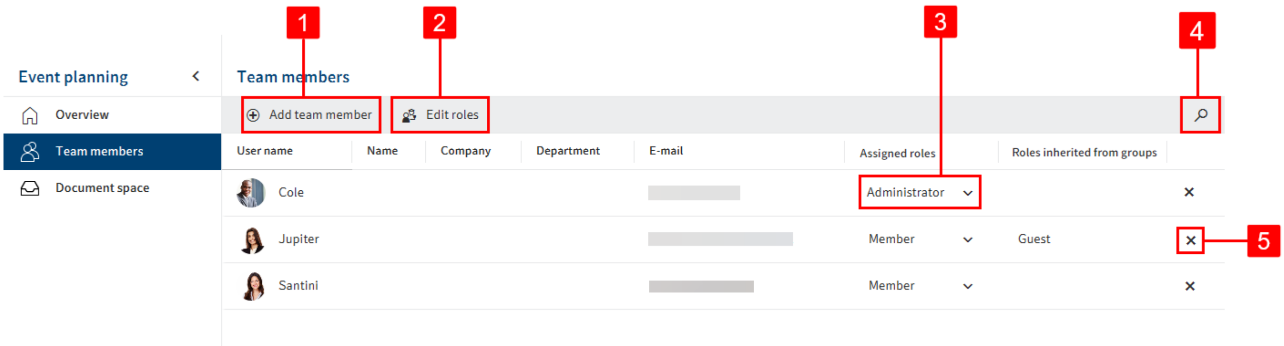
5 Close edit mode: All your changes will be saved.

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

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

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

'Team members' area



You have the following options:

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

> **Please note**
>
> New members need to restart ELO to access the space.

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

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

4 Search for team members

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

Roles

The following four roles are available as standard:

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

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

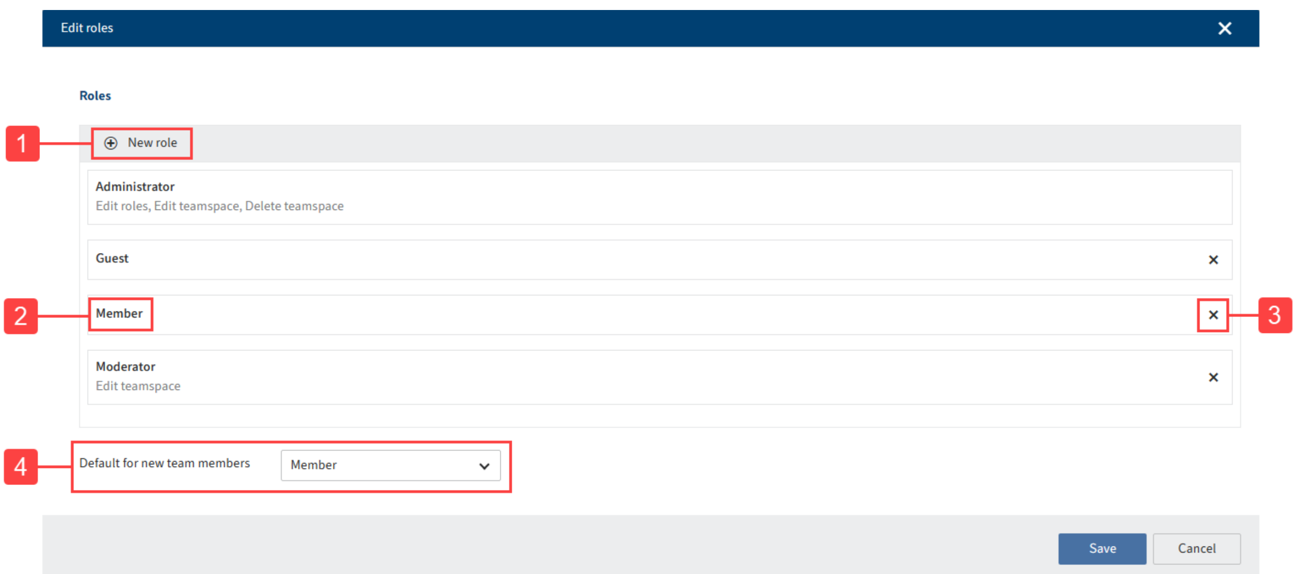
The roles can be edited.

Edit roles

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

Method

Select *Edit roles*.



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

1 Add new role: This is where you define the rights for the role members.

2 Edit existing role

3 Delete role

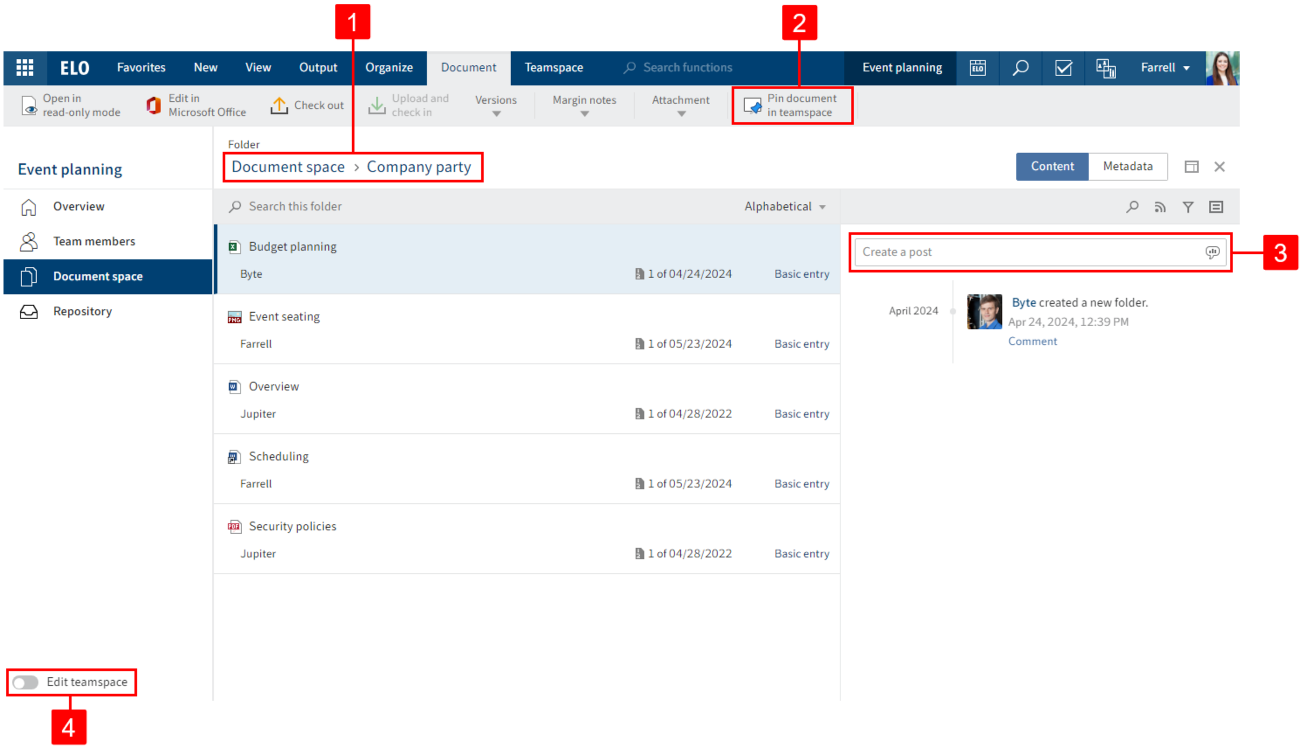
4 Set default for new team members: You can specify in the drop-down menu which role newly created team members are assigned by default. This role can still be changed after creating a member.

Document space

A document space can have any name.

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

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



You also have the following options here:

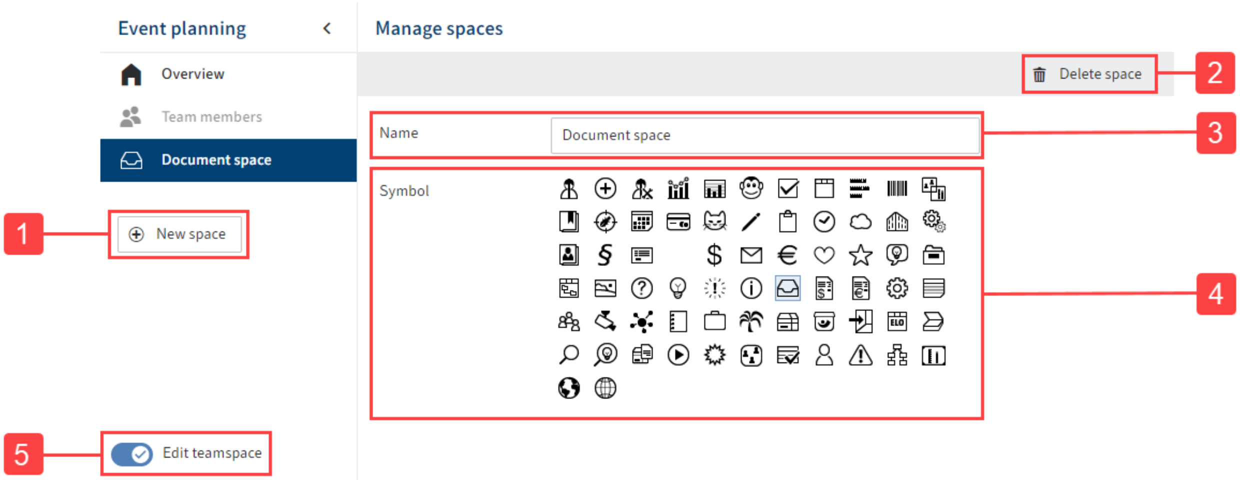
1 Breadcrumb navigation: If you are in a folder, you can go back to a parent folder. In this case, you need to select the name of the folder in the breadcrumb navigation.

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

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

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

Edit document space



You have the following options:

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

2 Delete space

3 Change the name of the document space

4 Change the icon of the document space

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

Workspace

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

You will find general information in the Workspaces section.

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

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

Create teamspace

You can create new teamspaces.

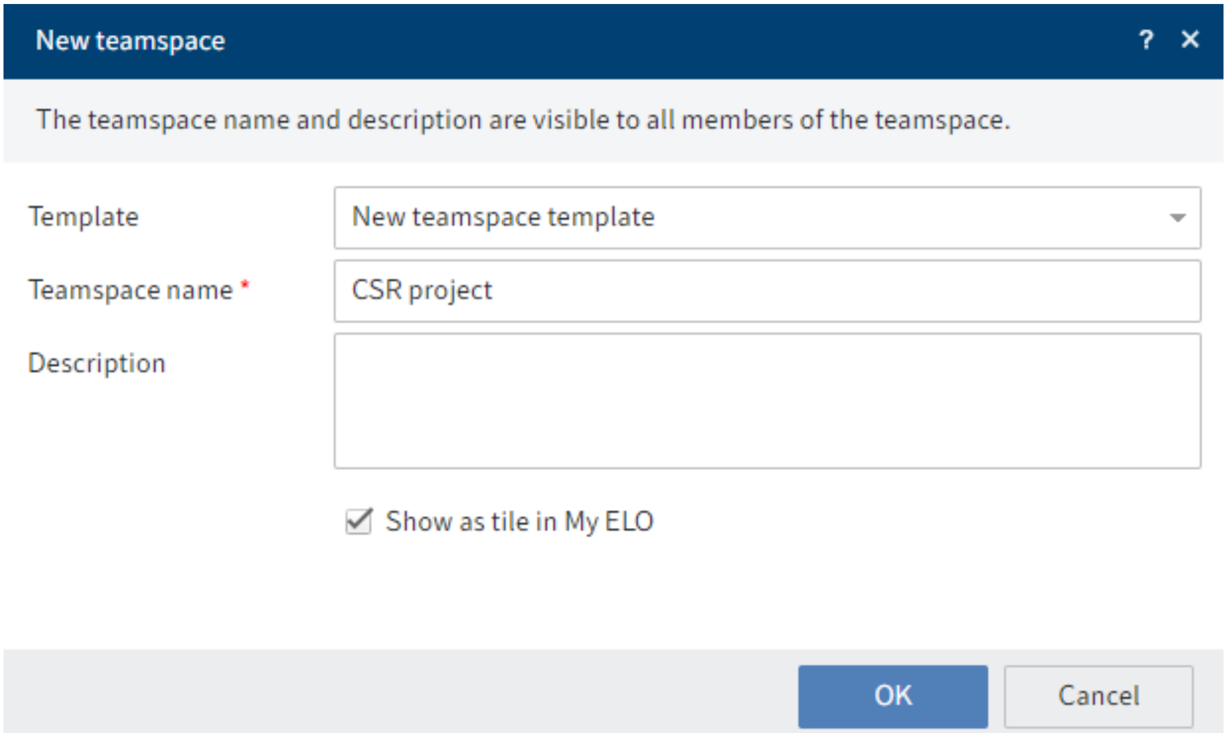
Requirements

The administrator will already have created teamspace templates.

Method

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

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



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

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

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

5. Select *OK*.

Result

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

Outlook

You can now edit the teamspace and add other members.

You will learn how to proceed in the next sections:

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

'Favorites' tab

This tab contains several important functions by default.

You can customize this tab by adding functions or removing ones you don't need from the tab.

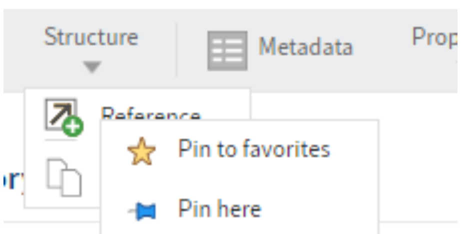
The *Most recently used* drop-down menu lists the 20 functions you most recently used. If you cannot run a function from your current position, it will be listed but grayed out.

Pin function to the 'Favorites' tab

You can pin any function from other tabs to the *Favorites* tab. The function also remains on the original tab.

Method

1. Right-click the function that you want to pin.



2. Select *Pin to favorites*.

Result

The function will now appear on your *Favorites* tab.

Outlook

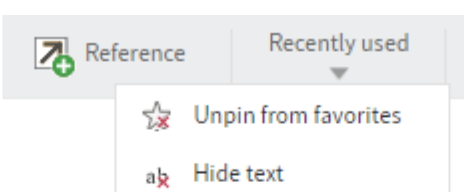
If you no longer need a function in your favorites, you can unpin it again.

Unpin function from the 'Favorites' tab

You can unpin functions that were originally on the *Favorites* tab as well as ones you added yourself.

Method

1. Right-click the function that you want to unpin.



2.

Select *Unpin from favorites*.

Result

The function is removed from your *Favorites* tab. You can still access it from its usual position on the ribbon.

'New' tab

The functions on the *New* tab allow you to create folders or documents in ELO and start tasks.

New folder

For information on how to use this function, refer to the chapter Create new folder.

Related functions

- Copy: If a folder with the basic structure you need already exists, you can copy this basic structure without content.
- Dynamic folder: This function allows you to create a folder whose content changes dynamically. The content of a dynamic folder is based on the result of a search. All search results appear in the folder.

Insert file

For information on how to use this function, refer to the chapter File document.

Related functions

- Drag-and-drop: You can drag documents straight from your file system to a folder in ELO.
- Document from template: If you want to create a document from a template, use this function.
- Copy: If you want to file a document that already exists in identical form in the repository, use this function.

Document from template

This function allows you to generate documents from a template, for example reports. Generally, you can use any document that you have access to as a template.

Method

1. Select the folder that you want to file the document to.
2. On the ribbon, select *New > Document from template*.
3. Select the document you want to use as a template.

   To make sure you select the right document, you can view it using the *Open in read-only mode* function.
4. Enter metadata.

   For more information, refer to the chapter Metadata.
5. Select *OK*.

Result

The document is stored in the folder you selected.

At the same time, the *Check out* dialog box appears automatically so that you can edit the document right away.

Outlook

You can learn how to check out and edit the document in the chapter Check out and edit document.

If you do not want to edit the document, select *Close* in the *Check out* dialog box. On the ribbon, select *Document > Versions > Cancel editing*.

Start workflow

For information on how to use this function, refer to the chapter Start workflow.

Related function

Ad hoc workflow: The function *Ad hoc workflow* is used to start short default workflows (approval and notification).

Ad hoc workflow

This function starts a new ad hoc workflow. Ad hoc workflows are simple, predefined workflows available in ELO. You can use an ad hoc workflow to route an item to users for approval or to notify users.

Related function

Start workflow: Use this function to start more complex workflows that were created specifically for your company.

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 *Finish* on the right side of the dialog box and configure additional settings for the ad hoc workflow here:

   Recipient: From the drop-down menu, select who to notify after the ad hoc workflow is completed.

   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.

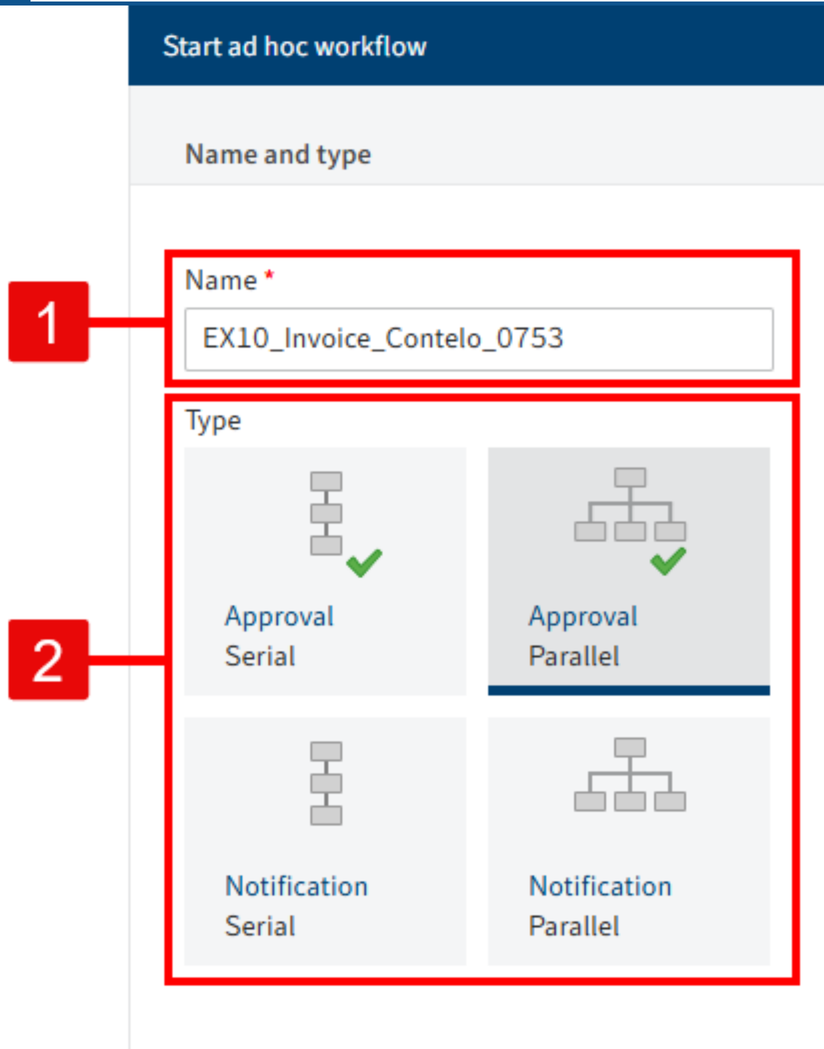
5. Select OK.

Result

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

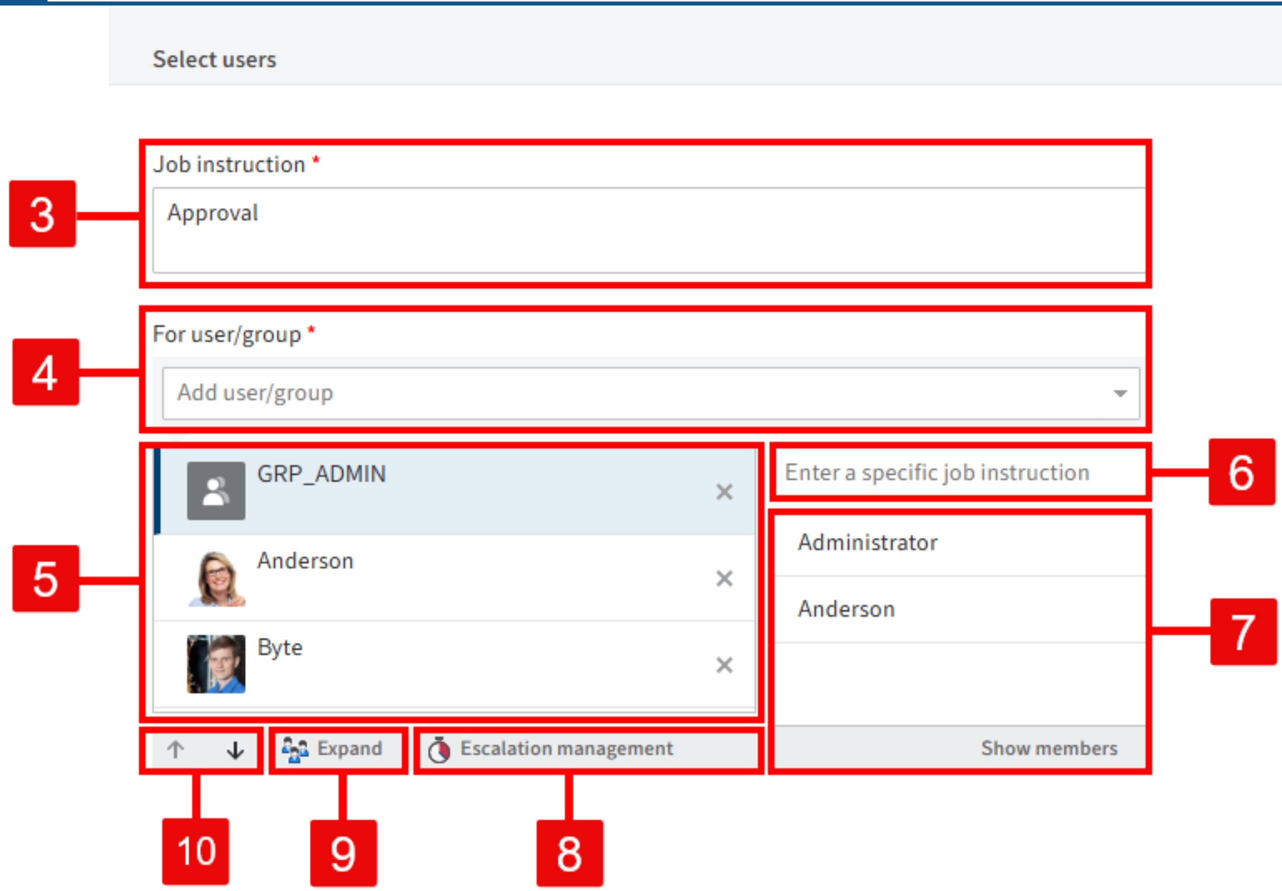
Settings for the ad hoc workflow

The following options are available:



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 Enter job instruction: The job instruction can have a maximum of 128 characters.

4 Add user/group

5 Users and groups that were added to the workflow

6 Enter individual 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 received the workflow. The job instruction can have a maximum of 128 characters.

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

8 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.

9 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 a 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.

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).

Reminder

You can use reminders to remind yourself of entries that you want to deal with at a later time.

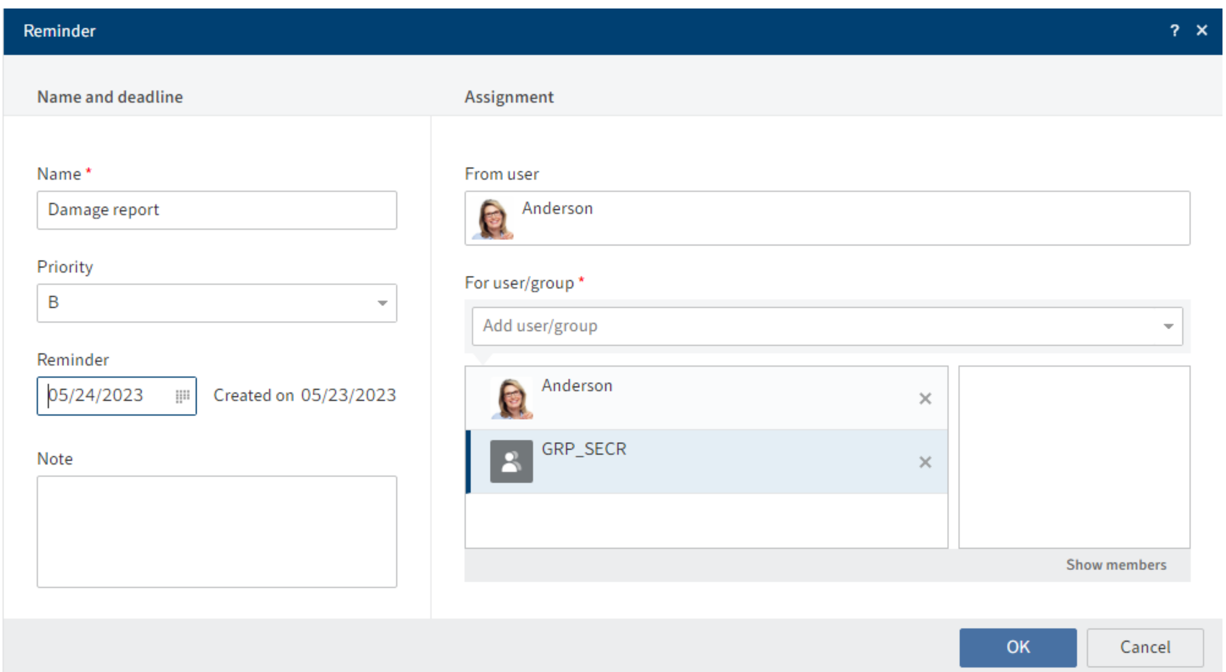
You can create reminders for folders and for documents. You can create a reminder for multiple entries within a folder at the same time.

Method

1. Select the entry you want to create a reminder for.

   You can also create reminders for multiple entries at the same time. You can learn how to do this in the chapter How do I select multiple entries?

2. On the ribbon, select *New* > *Create task* > *Reminder*.



3. Configure the settings for your reminder in the *Reminder* dialog box.

   Information

If you selected multiple entries, only the dialog box for the topmost selected entry appears at first. As soon as you have edited the settings and clicked *OK*, a new dialog box opens for the next selected entry.

Priority: The priority level is shown in the tasks overview when a reminder is received.

Date: Select the date the task should be completed on. The date appears in the tasks overview as the *Task date*. Depending on the settings for how tasks are displayed, the reminder may also show up in the Tasks work area of the selected users a few days beforehand.

Information

The time at which the reminder appears in the Tasks work area depends on the setting under *User menu [your name] > Configuration > Display > Task list display options > Show tasks due in the following number of days*.

For user/group: Select the recipient(s) of the reminder from the drop-down menu.

In the field below *For user/group*, you can see which recipients have already been selected. Click the X icon to delete the users again.

Show members: If you selected a group, you can view the group's members.

4. Select *OK*.

Result

The reminder appears in the *Tasks* work area of the selected users at the configured time. You will recognize it by the calendar icon.

Outlook

To remove the reminder from your task view, select the notification, then, on the ribbon, select *Organize > Delete*.

Monitor changes

You can monitor individual entries. If changes have been made to monitored entries, you will be notified in your *Tasks* work area.

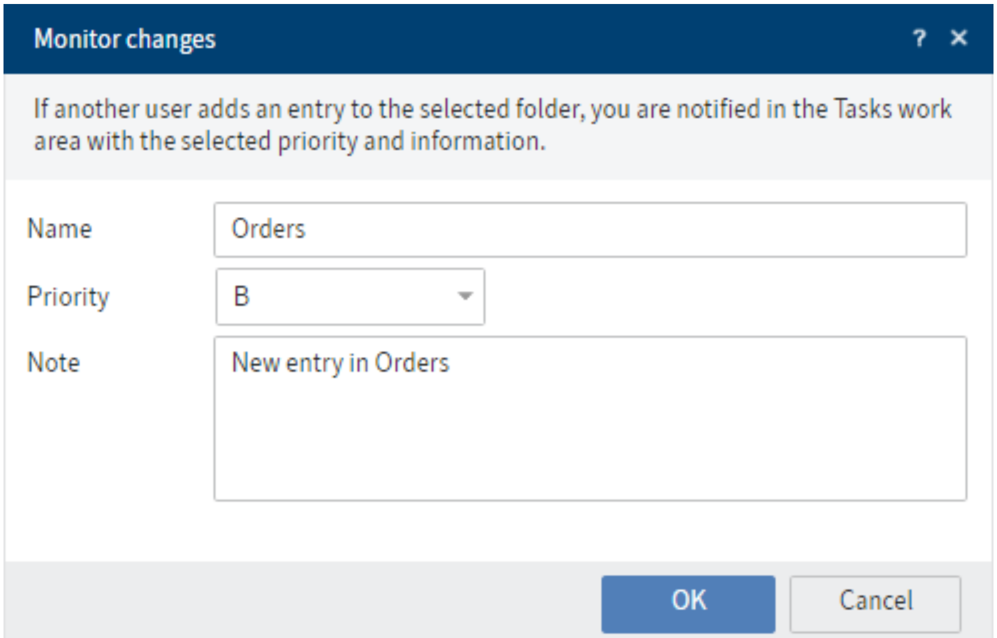
- Folder: If you monitor a folder, you receive a notification as soon as other users add entries to this folder.
- Document: If you monitor a document, you receive a notification as soon as other users file new versions of the document.

Method

1. Select the entry you want to monitor.

2.

On the ribbon, select *New > Create task > Monitor changes*.



3. Make the settings in the *Monitor changes* dialog box.

4. Select *OK*.

Result

As soon as other users modify the entry, you will receive a notification in your *Tasks* work area.

You can recognize notifications by the camera icon.

Under the entry name, you will see the text you entered when you started monitoring the entry.

You will also see the name of the user who edited the entry.

Outlook

- To remove the notification from your task view, select the notification, then, on the ribbon, select *Organize > Delete*.
- You can edit or end monitoring actions at a later point. For more information, refer to the Monitoring overview chapter.

'View' tab

The *View* tab contains functions for changing how entries are displayed in ELO.

Go to

This function takes you to the filing location of the selected entry in the *Repository* work area.

> **Information**
>
> Links also have a *Go to* button. For more information, refer to the chapter Link.

If you are in one of the work areas *Search*, *Tasks*, *Clipboard*, or *In use*, *Go to* takes you to the corresponding entry in the *Repository* work area.

Used in the *Repository* work area, this function takes you from a reference to the original entry.

Method

1. Select the entry whose filing location you want to go to.

2. On the ribbon, select *View > Go to*.

Result

You are now at the filing location of the selected entry in the *Repository* work area.

Link

Available in: *Repository* work area

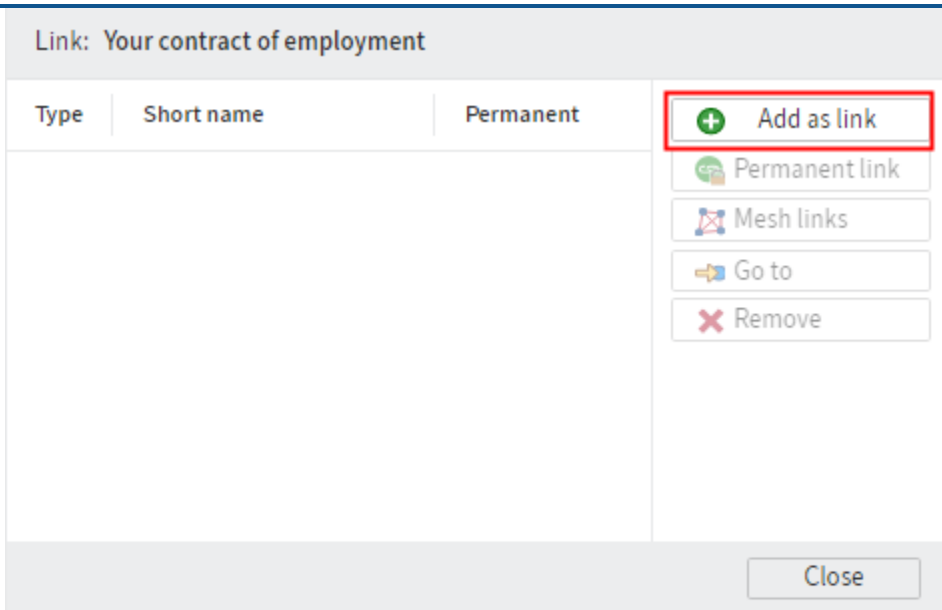
You can link folders or documents that are related. This enables you to access an entry from another entry using the link.

Method

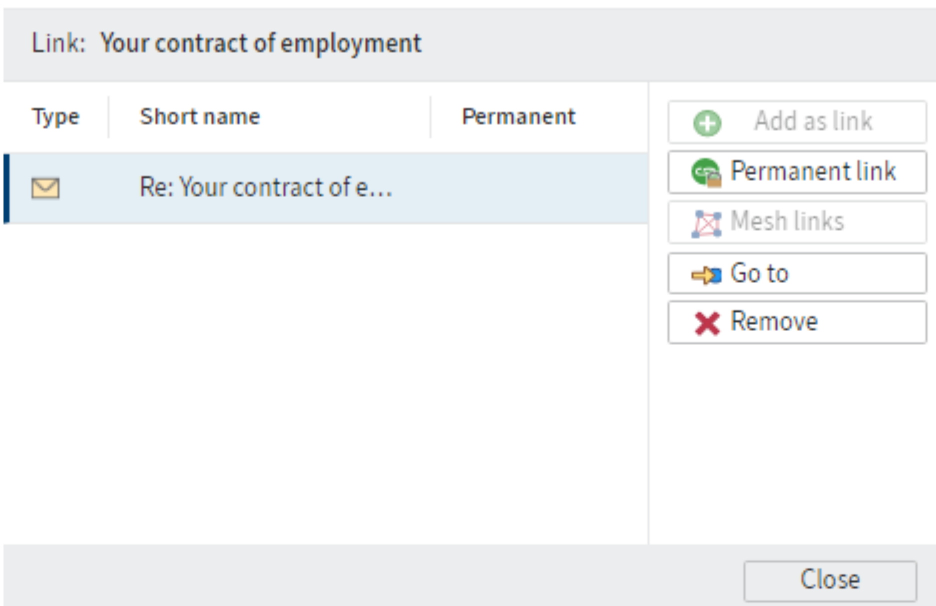
1. Select an entry you want to link with another entry. The order in which you select the entries is irrelevant. Both entries are linked.

2. On the ribbon, select *View > Navigation > Link*.

3. Select the second entry you want to link.



4. Select *Add as link*.



The entry you selected in step 4 appears in the list of links.

To link multiple entries with the entry you selected first, repeat this process with the other entries. This way, each entry is linked with the first one but not with each other.

5. If you do not want to link any more entries, select *Close*.

Result

The documents are linked.

You will recognize documents with links by the chain button that appears.

Outlook

The chain button takes you to the overview of links for the entry.

Additional functions

Once you have created a link, the other buttons become active as soon as you select one or more entries in the list of links. You can learn how to select multiple entries in the chapter How do I select multiple entries?

- Permanent link: You can link two or more entries permanently if you select them at the same time and select *Permanent link*. If you do this, you can no longer remove the links from the list of links with the *Remove* button.
- Mesh links: If you create mesh links for multiple entries, the entries are no longer only linked to the original entry but also with each other. Select all entries that you want to link and select *Mesh links*.
- Go to: If a link exists, select the entry and select the *Go to* button to go straight to the linked entry.
- Remove: To remove one or more entries from the list of links, select the corresponding entries and click *Remove*. If the *Remove* button does not become active after selecting an entry, the link you are trying to remove is permanent.

Go to top level

Available in: *'Organize' tab > Go to top level*

This function takes you to the top level of the *Repository* work area from any position in any of the work areas.

If you are in a folder view, the function takes you to the top folder level. If you select the *Go to top level* function from here, this takes you to the top level of the *Repository* work area.

Copy to clipboard

You can place entries that you require frequently on the Clipboard. For more information, refer to the chapter Clipboard.

Method

1. Select the entry or entries that you want to place on the Clipboard.

   You can learn how to select multiple entries in the chapter How do I select multiple entries?

2. On the ribbon, select *View > Navigation > Copy to Clipboard*.

Result

You will now find the entry in your *Clipboard* work area.

Outlook

To remove the entry from the Clipboard, use the Remove from Clipboard function.

Remove from Clipboard

You can remove an entry from the Clipboard if you no longer need it. For more information, refer to the chapter Clipboard.

Method

1. Select the entry or entries that you want to remove from the Clipboard.

   You can learn how to select multiple entries in the chapter How do I select multiple entries?

2. On the ribbon, select *View > Navigation > Remove from Clipboard*.

Result

You can no longer access the entry from the Clipboard.

Refresh

If you select *View > Refresh* on the ribbon, changes recently made by other users are immediately applied.

Create view

A view provides you with quick access to a specific area of the repository.

When you create a view, it is displayed as a tile in the tile navigation on your *My ELO* home screen.

You can create views for folders or tasks. This chapter describes how to create a task view. You can learn how to create a folder view in the chapter Create tile.

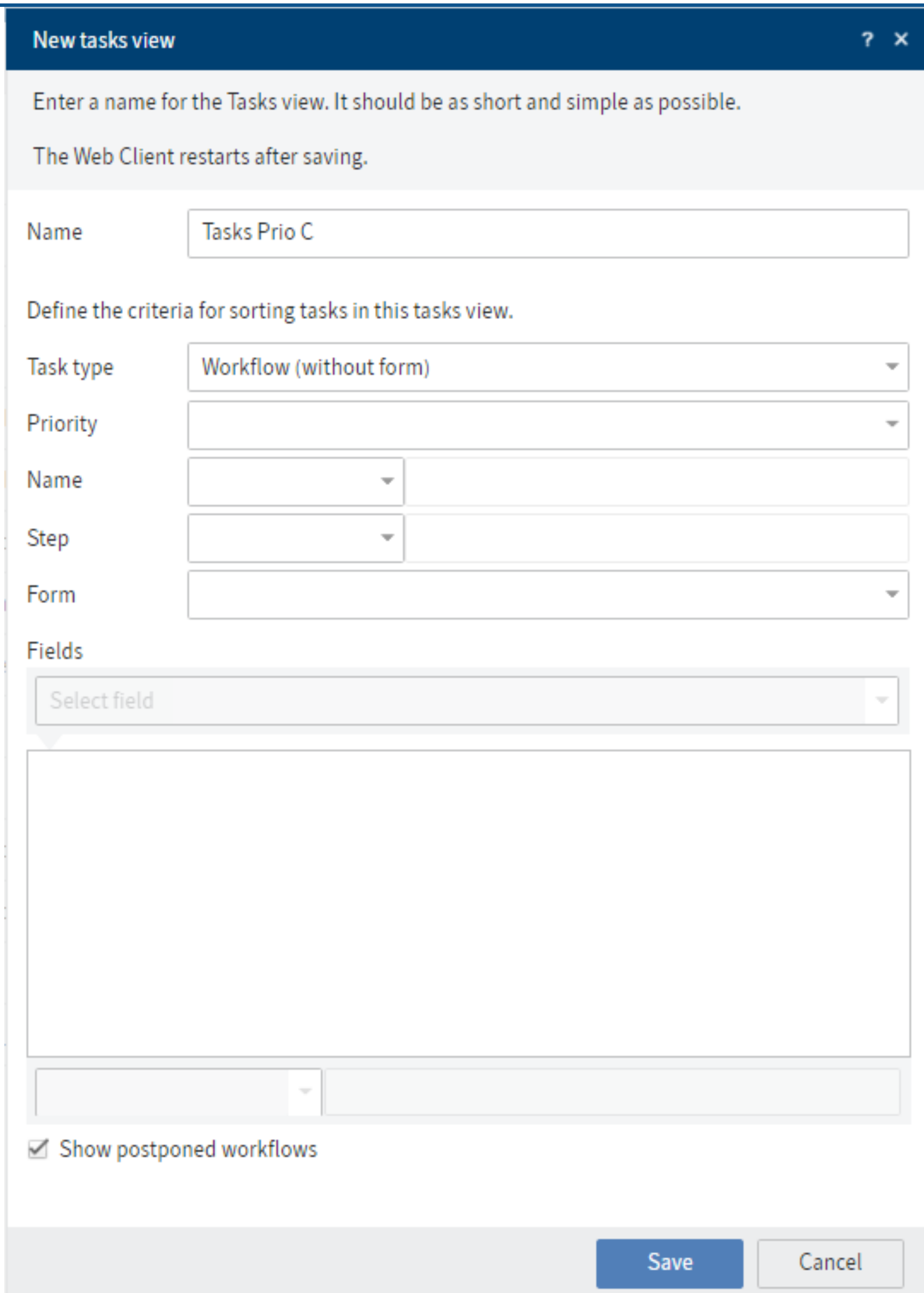
You can create task views with your own custom criteria, for example with a high priority.

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

Method

1. Navigate to the *Tasks* work area.

2. On the ribbon, select *View > Create view*.



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*.

   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 in the *Form* field, you can select a field from the metadata form from the *Field* drop-down menu.

4. Select *Save*.

Result

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

Outlook

- You can drag and drop a tile to another position.
- 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.

Show postponed workflows

To view postponed workflows, you need a corresponding task view.

Available in: *Tasks* work area

Method

1. On the ribbon, select *View > Create view*.

2. Enable the *Show postponed workflows* option.

3. Make additional settings if needed.

Result

A new tile is created on your *My ELO* home screen. This tile takes you to your postponed workflows in the *Tasks* work area.

Rename view

You can change the name of a folder view or task view after you create it.

You can learn how to create a folder view in the chapter Create view.

You can learn how to create a task view in the chapter Create view.

Method

1. On your *My ELO* home screen, select the view tile you want to rename.

   This opens your view.

2. On the ribbon, select *View > Views > Rename view*.

3. In the *Rename view* dialog box, enter the new name of the view.

4.

Select *Save*.

Result

The view tile now has the new name you entered.

Delete view

If you no longer need a folder view or task view, you can delete it.

You can learn how to create a folder view in the chapter Create view.

You can learn how to create a task view in the chapter Create view.

Method

1. On your *My ELO* home screen, select the view tile you want to delete.

   This opens your view.

2. On the ribbon, select *View > Views > Delete view*.

3. Click *Yes* to confirm the *Delete view* dialog box.

Result

The view tile disappears from your tile navigation.

Table

The table view shows you more information about the child entries. You can use it in all work areas when you select a folder.

Method

1. Select a folder or task in the *Tasks* work area.

2. On the ribbon, select *View > Table*.

Result

You see the metadata of the child entries in table form. More information about the task is displayed in the *Tasks* work area.

Outlook

You can close the table view by selecting *View > Table* on the ribbon again.

Image preview

You can use the *Image preview* function to display documents if there is no viewer available for the original format.

This button is only enabled if a preview image is available for the document.

> **Information**
>
> An image preview is available for all PDF and TIFF documents. For other formats, you will have to create one, for example using the *Create document preview* function in the ELO Java Client. You do not have the option to create a image preview in the ELO Web Client.

Method

1. Select the document that you want to display as an image preview.

2. On the ribbon, select *View > Image preview*.

Result

You can now see the document in the image preview.

The image preview has a menu bar with the following functions:

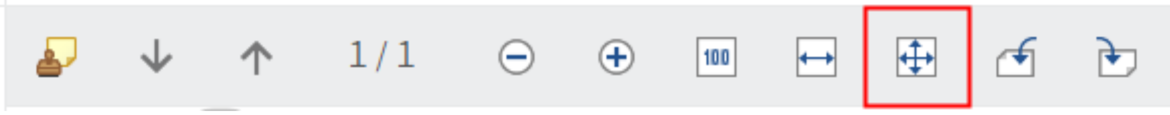
Show annotations: You see the annotations applied to the document. Sticky notes can only be created with the ELO Java Client.

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

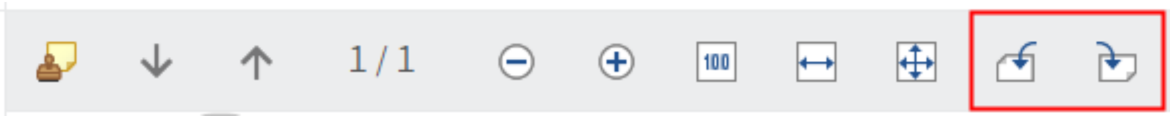
Zoom in or zoom out: Increases or decreases the size of the image shown.

Zoom to 100%: The image is displayed in the original size.

Fit image width to the frame: The image size fits the width of the viewer pane.



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



Rotate all pages 90 degrees: Rotates the preview 90 degrees.

Outlook

To close the image preview, select *View > Image preview* on the ribbon again.

Full text

The text view is used to display the full text information of documents that have been added to the full text database. You can also configure this view for documents with specific file extensions.

If there is no full text information for the document, the button is grayed out.

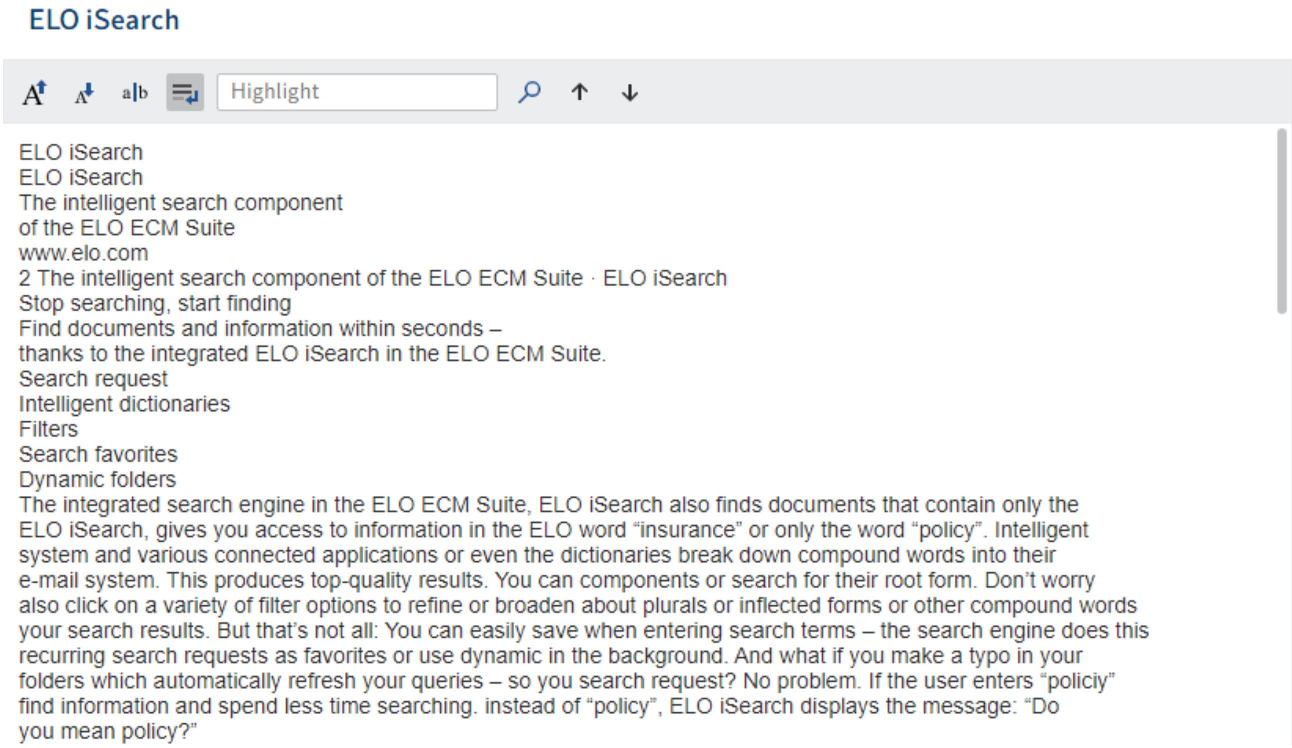
> **Please note**
>
> Binary files may result in display errors.

Method

1. Select the document whose full text content you want to display.

2. On the ribbon, select *View > Full text*.

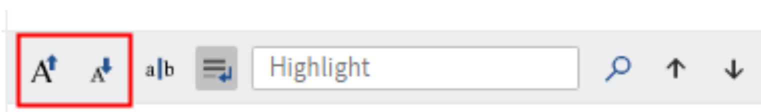
Result



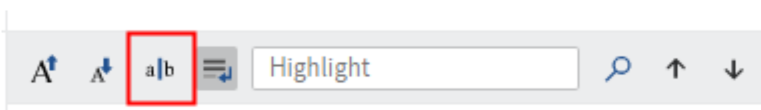
ELO iSearch
ELO iSearch
The intelligent search component
of the ELO ECM Suite
www.elo.com
2 The intelligent search component of the ELO ECM Suite · ELO iSearch
Stop searching, start finding
Find documents and information within seconds –
thanks to the integrated ELO iSearch in the ELO ECM Suite.
Search request
Intelligent dictionaries
Filters
Search favorites
Dynamic folders
The integrated search engine in the ELO ECM Suite, ELO iSearch also finds documents that contain only the
ELO iSearch, gives you access to information in the ELO word “insurance” or only the word “policy”. Intelligent
system and various connected applications or even the dictionaries break down compound words into their
e-mail system. This produces top-quality results. You can components or search for their root form. Don’t worry
also click on a variety of filter options to refine or broaden about plurals or inflected forms or other compound words
your search results. But that’s not all: You can easily save when entering search terms – the search engine does this
recurring search requests as favorites or use dynamic in the background. And what if you make a typo in your
folders which automatically refresh your queries – so you search request? No problem. If the user enters “policiy”
find information and spend less time searching. instead of “policy”, ELO iSearch displays the message: “Do
you mean policy?”

The full text is displayed.

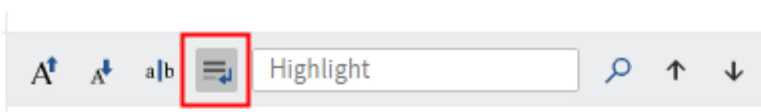
Documents in the full text view have a menu bar with the following functions:



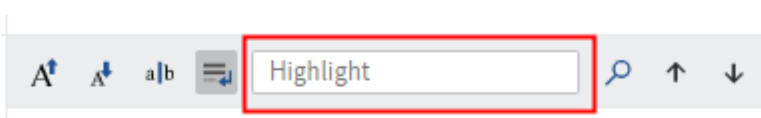
Increase or decrease font size: Increases or decreases the size of the displayed text.



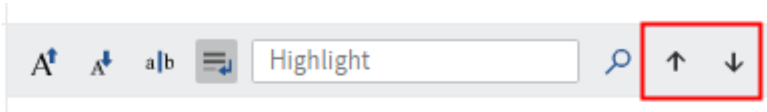
Fixed font width: Switches the display to a non-proportional font so that all characters are displayed with the same spacing. This improves readability, e.g. of code.



Automatic word wrap: Lines are wrapped automatically.



Highlight: To search for a term in the full text database, select the term in the *Highlight* field and select *Search*. Any matches are highlighted.



Show previous or next hit: Jumps to the last or next highlighted entry in the text.

Outlook

To close the full text view, select *View > Full text* on the ribbon again.

'Output' tab

This tab contains functions that allow you to save or send entries in ELO.

Send as ELO link

You can send a folder or document from ELO via e-mail. The recipient requires an ELO account and access to your repository to open the ELO link. The user also requires permission to read the selected entry. When opening the generated link, it is not necessary to log on the ELO Web Client if your administrator has enabled single sign-on (SSO).

> **Information**
>
> This function behaves differently if you have installed the ELO Web Add-ons. However, the method is identical.

Related functions

- Create external link: If you want to send a document to someone without access to ELO, use this function.
- Send document: If you have installed the ELO Web Add-ons, you can also use this function to send a document to someone without access to ELO.

Method

1. Select the entry or entries you want to send.

   You can learn how to select multiple entries in the chapter How do I select multiple entries?

2. On the ribbon, select *Output > Send as ELO link*.

Result

A new e-mail opens in your e-mail program. The short name of the entry is automatically used as the subject.

The recipient can open the filing location of the entry in ELO from the ELO link.

ELO Web Add-ons: In addition to the link to the ELO Web Client, the attachment also includes a link to the ELO Java Client.

Send document (ELO Web Add-ons)

You can send a document from ELO via e-mail. The recipient does not need an ELO account to open the document.

> **Information**

This function is only available if you have installed the ELO Web Add-ons.

Related functions

- Create external link: If you want to send a document to someone without access to ELO, you can also use this function.
- Send as ELO link: If you want to send a document to someone with access to ELO, use this function.

Method

1. Select the document or documents you want to send.

   You can learn how to select multiple entries in the chapter How do I select multiple entries?

2. On the ribbon, select *Output > Send document*.

Result

A new email with the documents attached opens in your e-mail program. The short name is automatically used as the subject.

Save as

You can save local copies of all documents that are stored in the *Repository* work area.

Information

It is not advisable to use this function in combination with the *Document > Load new version* function to edit a document because this would mean that document is not locked for other users.

Method

1. Select the document you want to save.
2. On the ribbon, select *Output > Save as*.

Result

The document is saved in your usual folder.

Export table

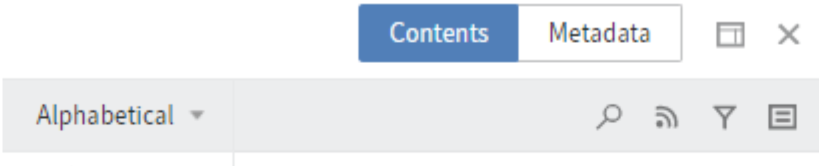
You can export metadata for entries in a folder. The metadata is exported as a CSV file.

The entries themselves are not exported.

This function is only enabled in the table view. If you are not in the table view, select *View > Table* on the ribbon.

Method

1. Select the folder whose table you want to export.

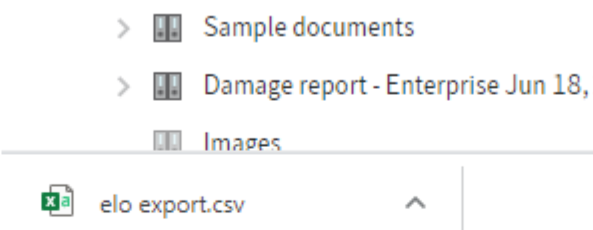


2. In the viewer pane, select the entry or entries whose metadata you want to export.

   You can learn how to select multiple entries in the chapter How do I select multiple entries?

3. On the ribbon, select *Output > Save > Export table*.

Result



The CSV file appears at the bottom of your browser.

Outlook

You can import the CSV file into popular spreadsheet programs and database systems, or into Excel spreadsheets.

Print document (ELO Web Add-ons)

You can print a document directly from ELO. You can also print even if the document cannot be shown.

> **Information**
>
> This function is only available if you have installed the ELO Web Add-ons.

Method

1. Select the document you want to print.
2. On the ribbon, select *Output > Print document*.

Create external link

You can send a folder or document from ELO via e-mail. The recipient does not need an ELO account to open the link.

Related functions

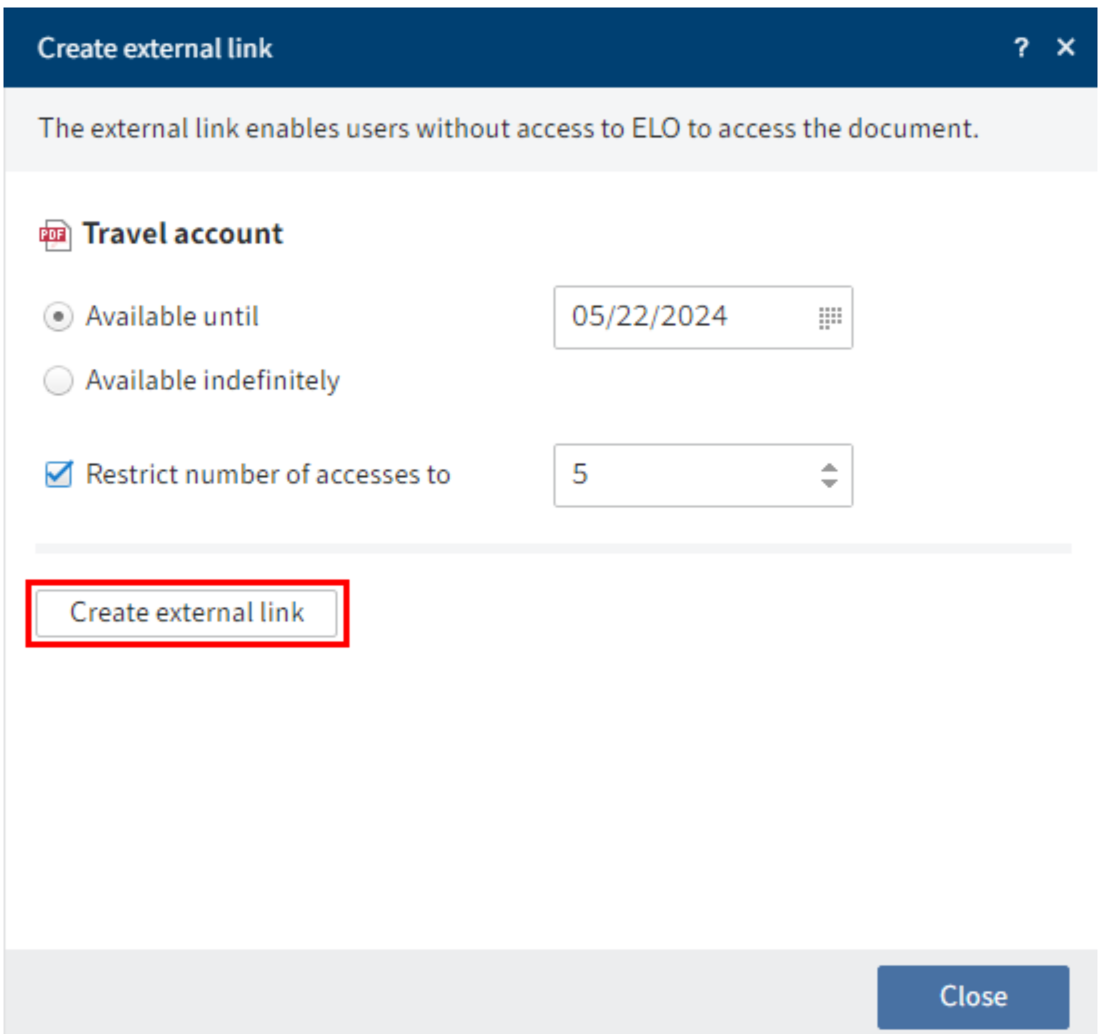
- Send as ELO link: If you want to send a document to someone with access to ELO, use this function.
- Send document: If you have installed the ELO Web Add-ons, you can also use this function to send a document to someone without access to ELO.

Method

1. Select the entry you want to send.

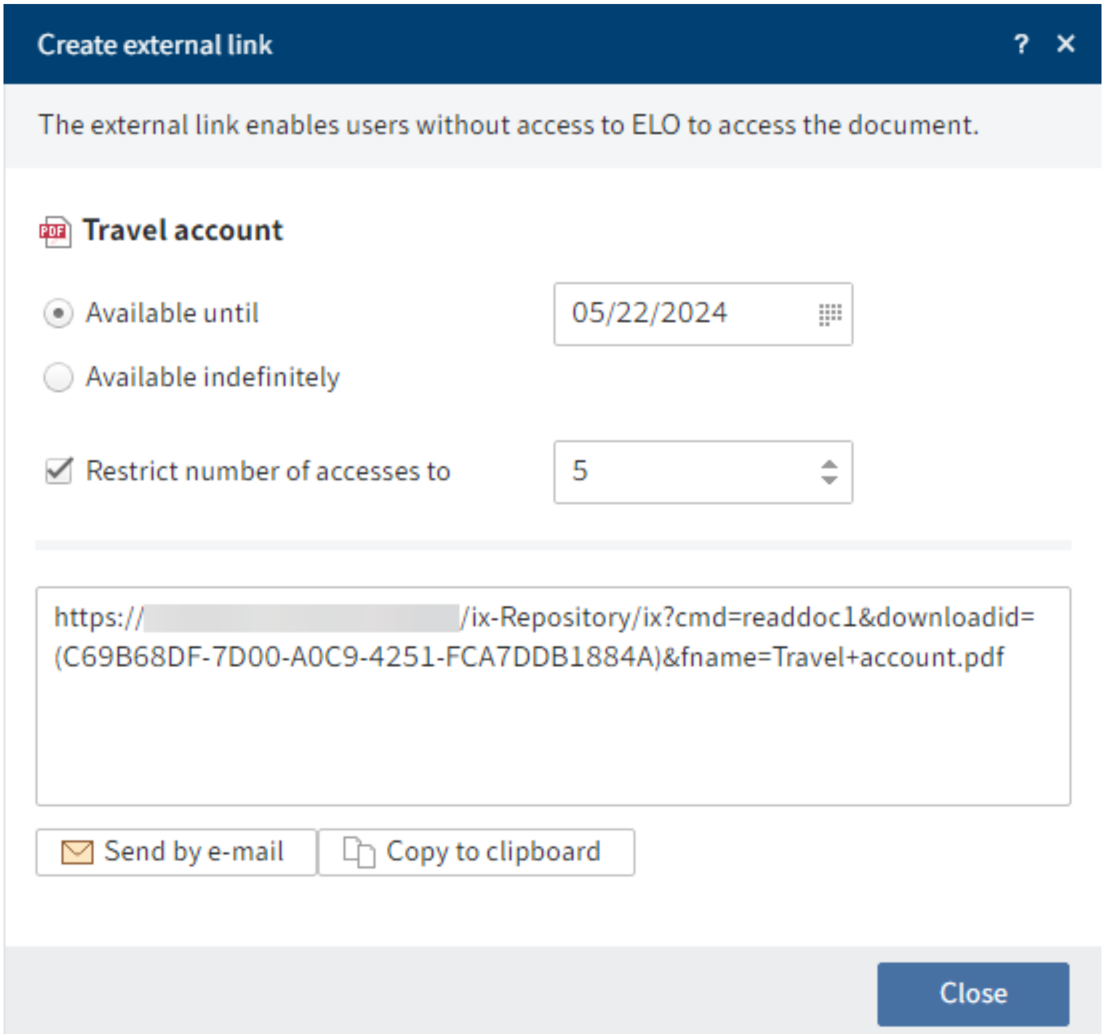
2. On the ribbon, select *Output > External link > Create external link*.

   Restrict availability: You can restrict availability to a specific period or the number of times the link can be opened.

3.

Select *Create external link*.



4. Send the link by e-mail. Alternatively, you can save it to the clipboard.

Result

The link is sent.

An external link also works when the entry it refers to has been moved.

Outlook

You can use the function External links overview to see a list of all external links. You can also use this function to edit or delete the external links.

External links overview

This function provides you with a list of all external links. You can edit or delete all the links in the list.

Method

On the ribbon, select *Output > External link > External links overview*.

Result

In the *External links overview* dialog box, you can see the links that have been created.

Outlook

If you select a link in the list, the following buttons become active.

- Go to: This function takes you to the entry in the *Repository* work area that the link was created for.
- Open in read-only mode
- Edit external link: This function allows you to change how long the link is available or the number of times it can be accessed.
- Delete external link: As soon as the external link is deleted, you can no longer access the entry using the link.

'Organize' tab

This tab contains functions that will help you organize your repository.

Move

Available in: *Repository* work area

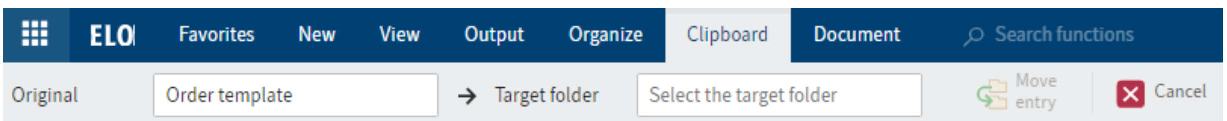
Use this function to move folders or documents within the repository.

Related function

Drag-and-drop

Method

1. Select the entry you want to move.
2. On the ribbon, select *Organize > Move*.



   The *Clipboard* tab appears.

3. To select a target folder, select the corresponding folder in the repository.

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

4. Select *Move entry*.

When moving a folder or document, if the permissions settings for the entry differ from the permission settings for the target folder, the *Move entries* dialog box appears. In this dialog box, you are provided with different options for the permissions settings.

Save selection and don't show this dialog box again: In the ELO Web Client configuration (*Configuration > Dialog boxes > Inherit permissions when moving entries*), you can define the settings for moving entries and also disable the dialog box.

Result

You will now find the entry at the selected new position in the *Repository* work area.

Reference

Available in: *Repository* work area

This function allows you to create a reference for folders or documents that you need at multiple positions in the repository.

Unlike when moving an entry, the entry remains at its original position. A reference is also created.

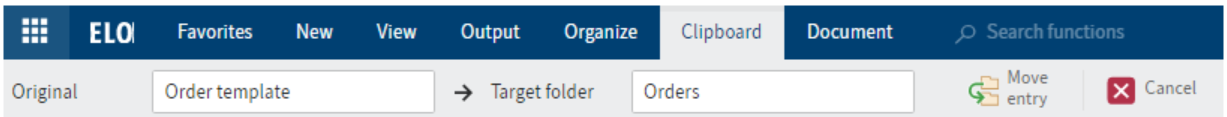
Unlike a copy, references and their original documents are always identical. They cannot be edited individually.

Related function

Drag-and-drop

Method

1. Select the entry you want to reference.
2. On the ribbon, select *Organize* > *Structure* > *Reference*.



The *Clipboard* tab appears.

3. To specify a target folder for the reference, select the corresponding folder in the repository.

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

4. Select *Create reference*.

Result

You will now find the reference at the selected position in the *Repository* work area.

Outlook

If you want to delete a document that has been referenced, ELO will notify you that this reference exists.

Copy

Available in: *Repository* work area

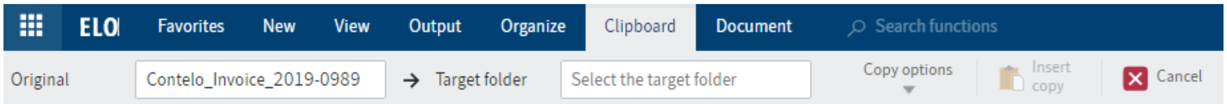
This function allows you to copy folders or documents that you need at multiple positions in the repository.

Unlike with referencing, the two entries are not linked after copying. They can be edited separately from one another.

Method

1. Select the entry you want to copy.
2.

On the ribbon, select *Organize > Structure > Copy*.



The *Clipboard* tab appears.

3. To select a target folder for the reference, select the corresponding folder in the repository.

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

   You can modify the copy via the *Copy options* menu:

   - Documents and folders: If you did not enable the *Retain user in 'Filed by' and 'Editor' field* option, your name will appear in these fields in the metadata of the copy.
   - Folder: You can select which elements of the folder your copy should include.

4. Select *Insert copy*.

Metadata

This function allows you to view the metadata for the entry.

If you have permission, you can edit the metadata. Metadata is data about a folder or a document. It includes information on the entry itself, for example when it was filed, or its name in the *Repository* work area. It also includes the permissions structure for the entry, meaning who has what access to the entry. The quality of a repository depends to a great extent on the quality of the metadata. Metadata allows you to organize documents in a standardized way and file them quickly to ELO. In addition, using metadata makes it easier to find documents.

A new metadata model was introduced with version ELO 21 in addition to the previous metadata model. Both models are used in parallel. In the following, these metadata models are referred to as generation 1 (gen. 1) and generation 2 (gen. 2).

In gen. 2, forms and metadata forms are shown differently in the *Metadata* dialog box. The metadata concept will remain the same.

There are three ways to open the *Metadata* dialog box manually. Select an entry and

- select *Organize > Metadata* on the ribbon.
- right-click to open the context menu, then select *Metadata*.
- press the keyboard shortcut F4.

This section provides information about entering metadata. Select one of the following links to go straight to a topic:

- Metadata forms
- Fields
- 'Metadata' or 'Basic' tab
-

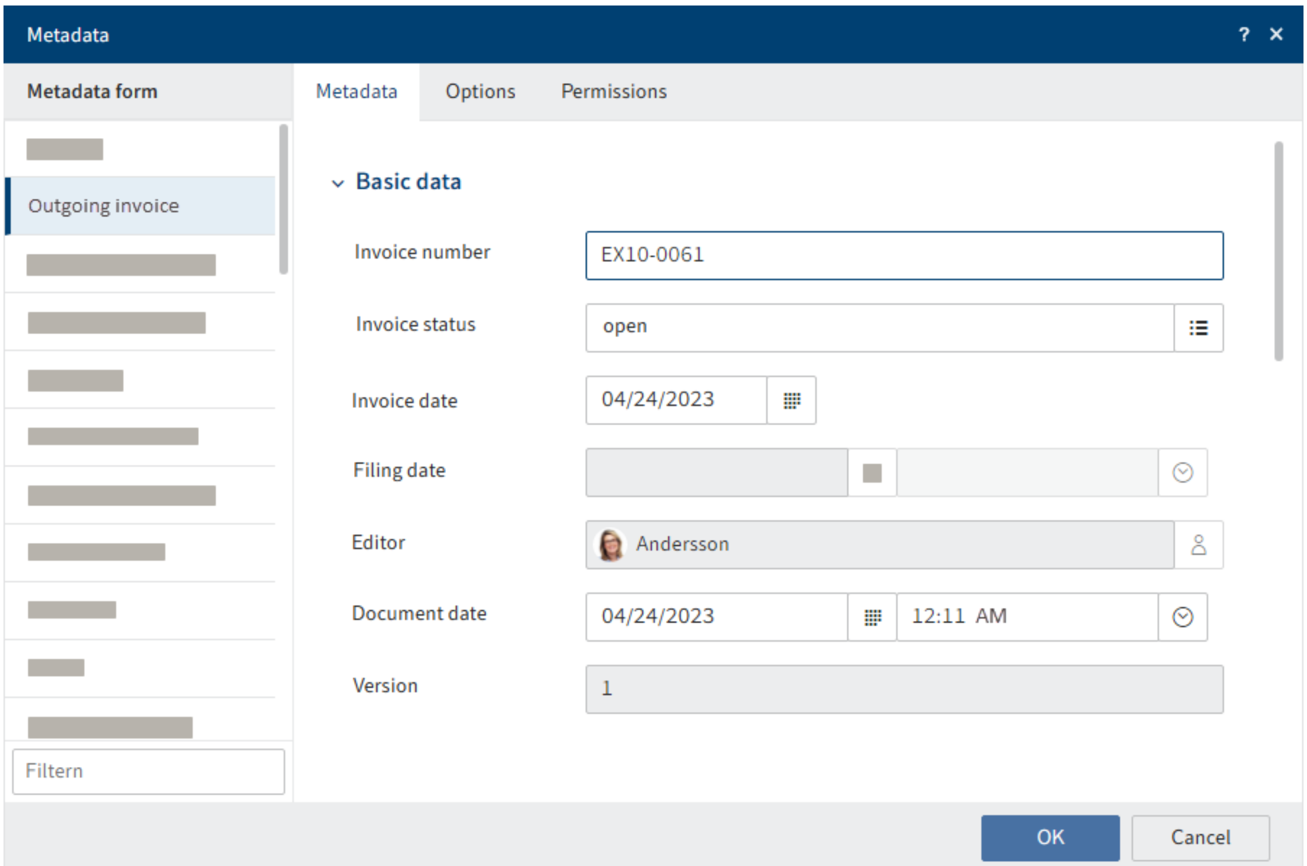
'Extra text' tab
- 'Options' tab
- 'Permissions' tab
- Enter metadata with ELO Click OCR
- Identify personal data

Metadata forms

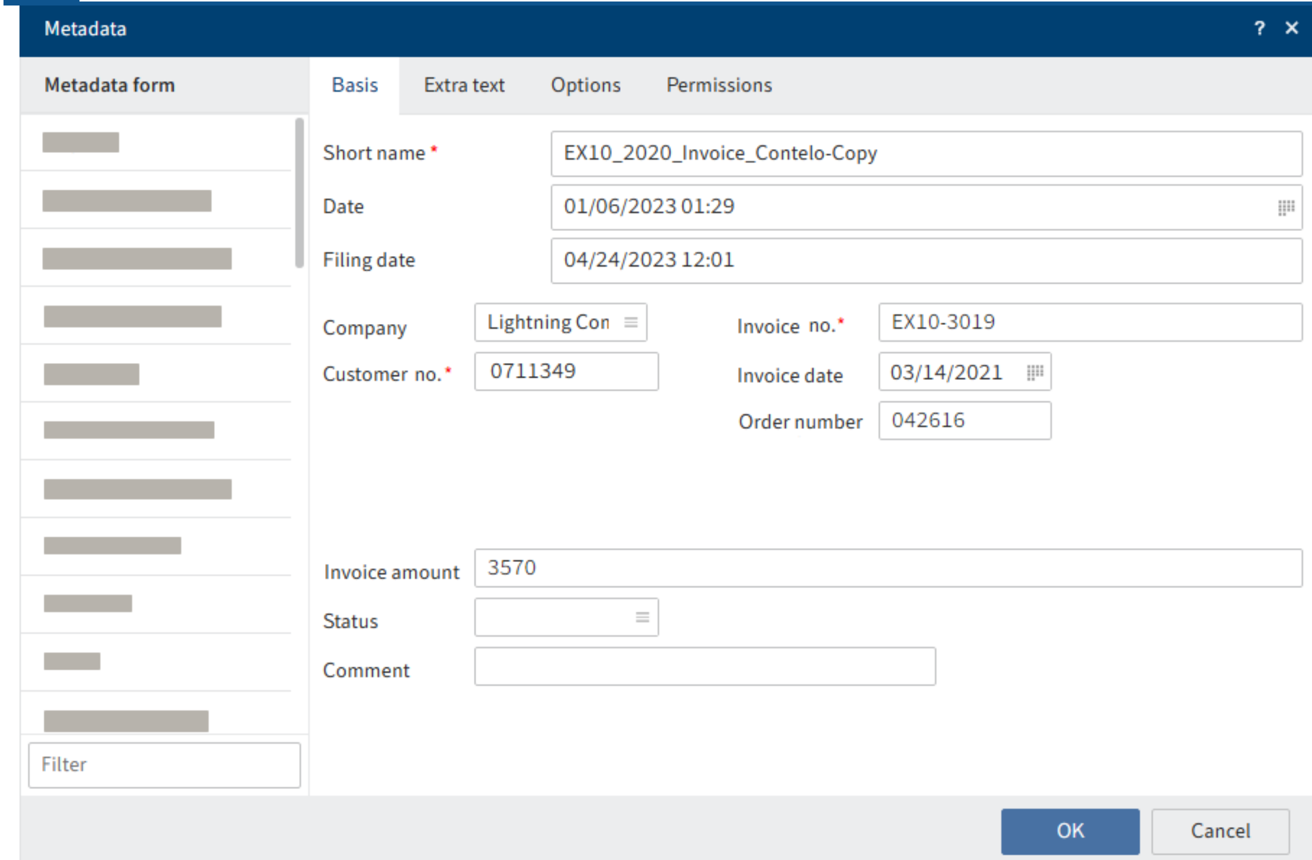
You enter metadata into metadata forms. Metadata forms contain templates that are specifically created for this document type. All documents of the same type receive the same permission settings and are filed to ELO based on a fixed pattern.

The view and functions in the metadata forms depend on the metadata model.

Gen. 2 metadata form



Gen. 1 metadata form



The *Available forms* area lists all the available metadata forms. The list contains either metadata forms for folders or for documents, depending on the type of entry selected in ELO.

> **Please note**
>
> When you change the metadata form, metadata may be lost or incorrectly assigned.

Fields

The metadata for a document is entered into fields.

The type of field determines the data you need to enter and what you need to consider when doing so. There are different types of fields, which can be configured differently from metadata form to metadata form.

> **Please note**
>
> Do not enter any words that can act as search operators (`NOT`, `OR`, `AND`) in fields. Otherwise, you may encounter issues when searching for these words.

Icons

If a field contains an icon, this means that ELO helps you to enter content in the field.

The following tools are available:

- Keyword list
- Drop-down menu
- Calendar
- Clock
- Relation

Keyword lists

Fields with keyword lists are used to standardize entries as they only allow you to enter predefined values.

To open the keyword list, click the keyword list icon. Navigate the list and select a keyword using the mouse or the up and down keys. Alternatively, you can type a keyword in the field. You will be offered possible keywords in the drop-down menu.

Keyword lists (gen. 1)

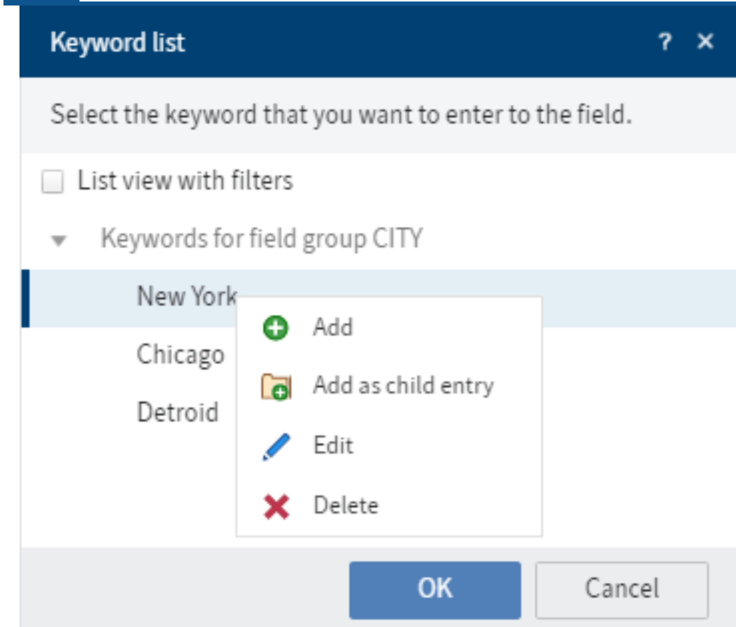
There are two types of fields with keyword lists in gen. 1 metadata forms:

- You have to select an entry from the keyword list.
- You can select an entry from the keyword list or you can type in your own entry.

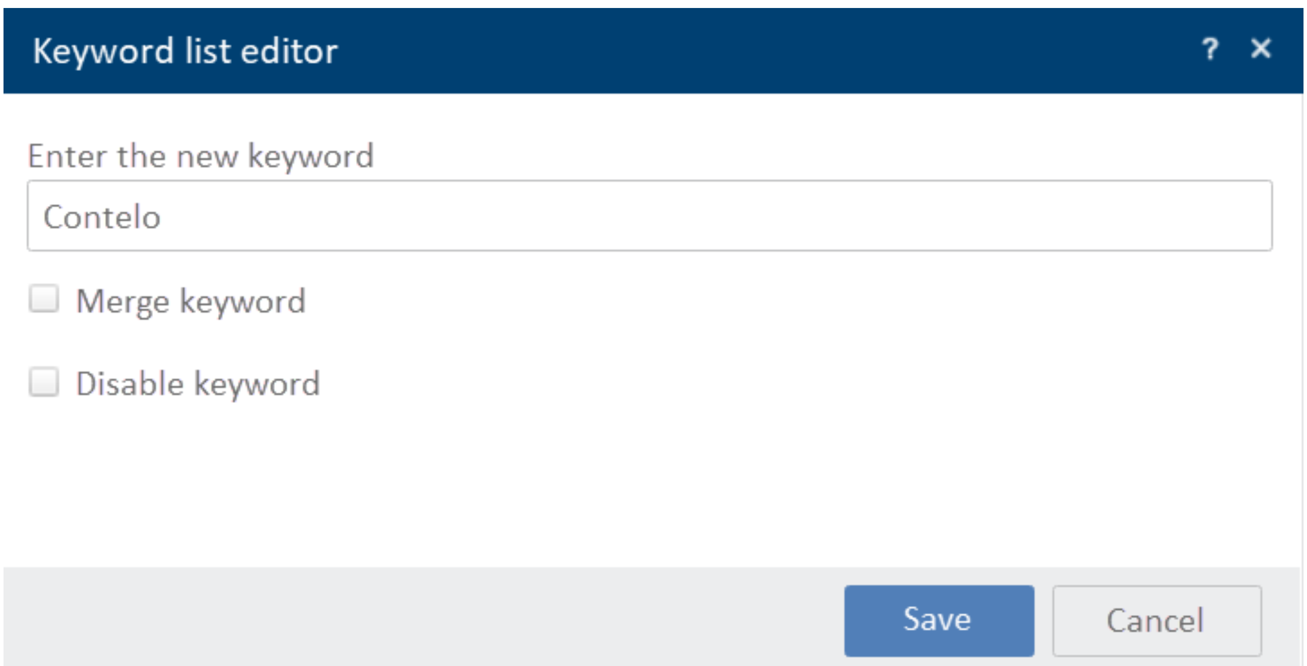
If you click a field and a keyword list appears, you cannot make entries.

To open the keyword list, click the keyword list icon. Navigate the list using the mouse or the up and down keys.

To edit the keyword list, right-click a keyword list entry.



You can add new keyword list entries or child entries via the context menu and edit or delete existing ones.



The following options are also available:

Merge keyword: If a keyword has child entries, you can use this option so that the child entries are always inserted into the field together with the parent keyword. The parent keyword option must be enabled for this to work.

For example, if your keyword list contains the keyword *Invoice* with the child entries *Miller* and *Smith*, either the expression *Invoice Miller* or *Invoice Smith* will be used. You can only choose between the child entries of the keyword.

Disable keyword: Use this option to deactivate a keyword. The keyword can no longer be selected and will be grayed out.

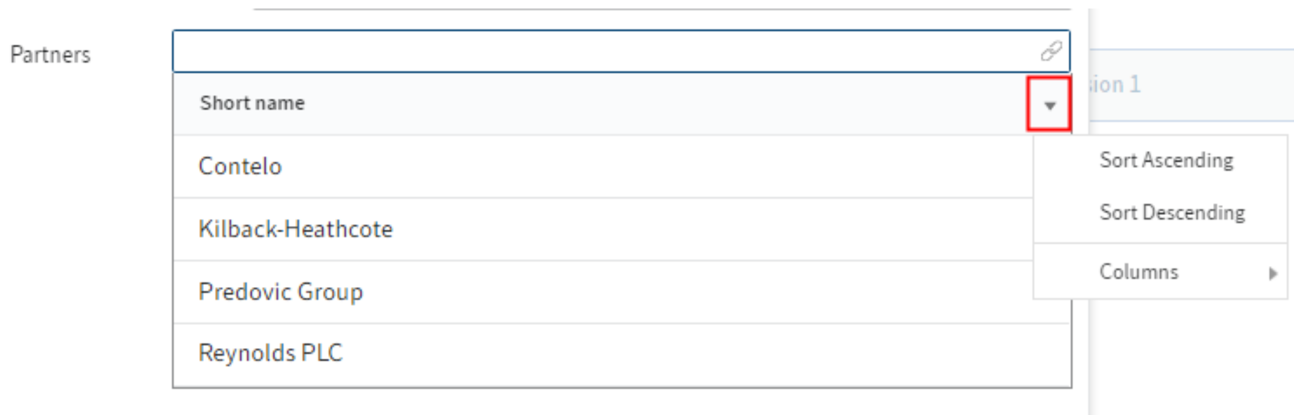
For fields without a keyword list, press F7 to open a list of previous entries to the selected fields.

Navigate the list using the mouse or the up and down keys.

Relations

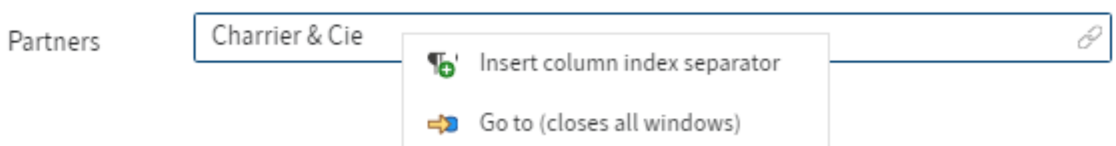
Relation type fields are used to link a field with the metadata of another entry.

The flyout (button with chain icon) opens a list of entries. Navigate the list using the mouse or arrow keys.



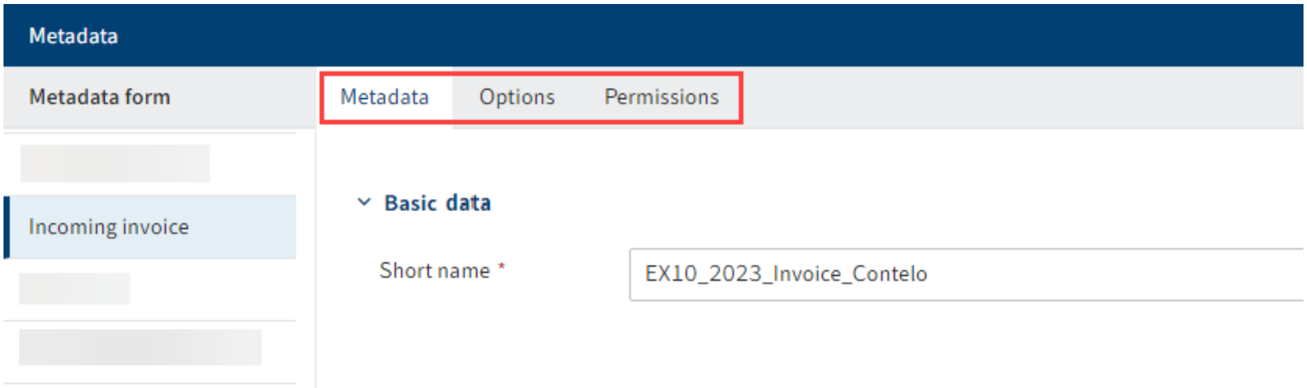
Sort the list using the drop-down menu next to the column headers.

Select the entry you want to link. The chain icon takes you straight from the metadata of the entry to the metadata of the linked entry.



If you right-click the field in the metadata for the entry, you can open the filing location of the linked entry with the *Go to* (closes all windows) button. Using this function closes the *Metadata* dialog box. For this reason, you should only use this function after saving the entry.

Tabs



Metadata forms are divided into tabs. There are several default tabs:

- Metadata (called *Basic* in gen. 1 metadata forms)
- Extra text (only in gen. 1 metadata forms)
- Options
- Permissions

The default tabs are briefly described in the following section. Additional tabs appear depending on the settings in the metadata form.

'Metadata' or 'Basic' tab

In gen. 1 metadata forms, the *Basic* tab contains the following default fields:

Short name: The short name is the name of the entry that is shown in the tree structure in the *Repository* work area.

Date:

- For documents: In this field, the date on which a document was created or most recently edited appears automatically. If you want to change the date to the day you file the document, enable the *Adjust document date (set to today)* option. If you do not enable this option, you will see the date on which the document was created under *Date*, and the date the document was filed to ELO is shown under *Filing date*. Another term for the date is *Document date*.
- For folders: You can select a date of your choice for this field.

For folders only:

ELOINDEX: This field is for the filing definition. When filing documents automatically, ELO identifies where to file the document through the ELOINDEX.

'Extra text' tab

Information

This tab only appears in gen. 1 metadata forms.

In this text field, you can enter information that is not covered by the other fields, for example a more exact description or a comment. The field can also be used for script settings.

'Options' tab

The *Options* tab is where you specify the characteristics and behavior of an entry. Depending on whether you are entering metadata for a document or a folder, different settings will be displayed.

You will find more information on the *Personal identifier*, *End of deletion period*, and *End of retention period* fields in the chapter Identify personal data.

Entry type: This option defines the type of entry. The icon of the entry is displayed in the list view in ELO according to the settings made here.

Font color: Select a color for the entry to highlight it in your repository structure.

Starting point for replication: If this option is enabled, you only replicate the selected entry and not the parent folders. This option allows you to replicate parts of repositories that are not stored in identical repository structures. First, you have to enable this option and then assign the folder to a replication set (*Ribbon > Organize > Properties > Assign replication sets*). You will find more information in the chapter Assign replication sets.

Information

If you configure this option for documents, the parent folder is still replicated.

For folders only:

Sort order: Define the sort order of the contents of the corresponding folder in the *Sort order* field. If you select *Manual*, you can move entries within the folder manually. To sort the contents of a folder manually, select the folder in the tree view. In the viewer pane, select the entry you want to move and drag it to the position where you want it.

Enable quick preview for documents in the folder: Use this option to view the first document in a folder in the viewer pane as soon as you select the folder.

For documents only:

Document status: In the *Document status* field, you can configure how the document behaves in the event of changes.

- Version control disabled: Only one version of the document is stored. A new version replaces the previous version. The previous version is deleted and is no longer available.

Important

> If you select this option, the previous version is overwritten each time you save. The *View > Document > Versions > Load new version* function overwrites the current version without creating a new one. Therefore, we do not recommend using this option.

- Version control enabled: If the document is changed, the previous versions are saved. The versions of a document can be restored.
- Non-modifiable: Neither the document nor the associated metadata can be edited.

> **Important**
>
> The status *Non-modifiable* cannot be reversed.

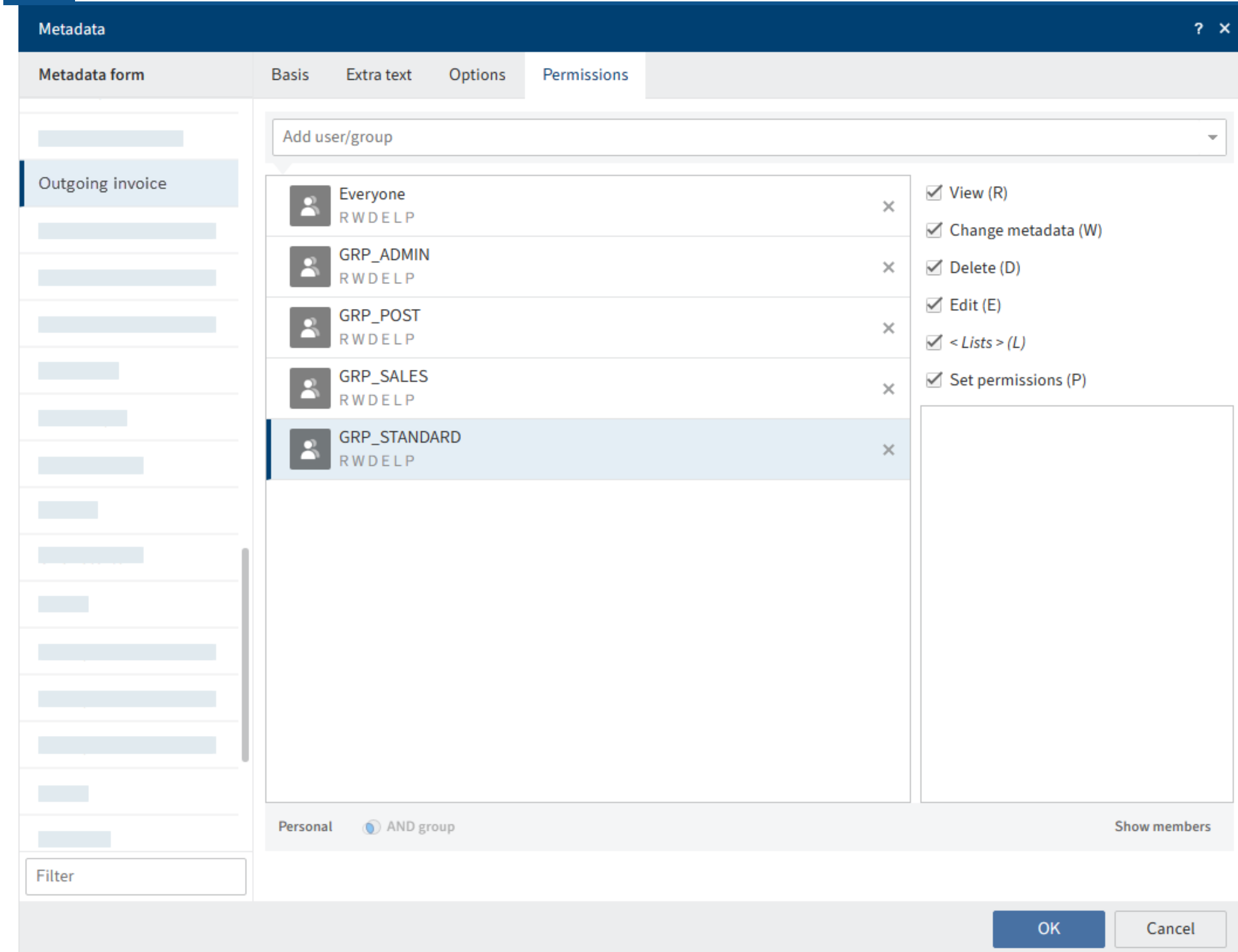
Encryption key: This field is completed automatically depending on the selected metadata form and cannot be changed.

Add to full text database: Enable this option to add the document to the full text database. This function indexes words so that they are available in the search.

File name: The previous name of the document is entered into this field automatically. The name you entered as the *Short name* on the *Metadata* or *Basic* tab is the one shown in the repository, and not this name.

'Permissions' tab

The users that have access rights to the selected entry are listed on the *Permissions* tab. You can change the settings, provided you have the corresponding permission.



Search for the desired user or group in the User/group field. Suggestions will appear as you type.

Select the corresponding suggestion to select a user or a group.

Alternative: Select the triangle next to the field to open a drop-down menu and select a user or group.

You can also select the options *Owner permissions* and *Parent permissions* from the drop-down menu. If you select *Owner permissions*, you assign yourself all the rights to the folder or document. Owner permissions can be transferred, such as when you leave the company. Select the *Parent permissions* option to assign the new folder or document the same rights as its parent entry.

In the middle column, you can see which users or groups have already been assigned permissions for the selected entry and which permission settings apply.

To edit the permissions settings, select an entry in the middle column and select or clear individual permissions.

The following options are available:

Access right	Description
View (R)	View entries and metadata, add annotations
Change metadata (W)	
Delete (D)	Mark entries as deleted. Only users with administrative rights can delete entries permanently.
Edit (E)	• Documents: Edit documents, e.g. check in, check out, load new version, change working version. • Folders: No effect. If this access right is granted to folders, entries stored in them can automatically inherit this access right.
Edit list (L)	Folders: Change folder contents, e.g. create, move, copy, or remove documents in the folder, insert or delete reference.
Set permissions (P)	Change permissions

> **Information**
>
> Options that are not applicable are shown in italics and enclosed in pointy brackets.

Personal: Use this button to assign yourself sole access to the respective entry. If other users or groups had permissions, they are removed.

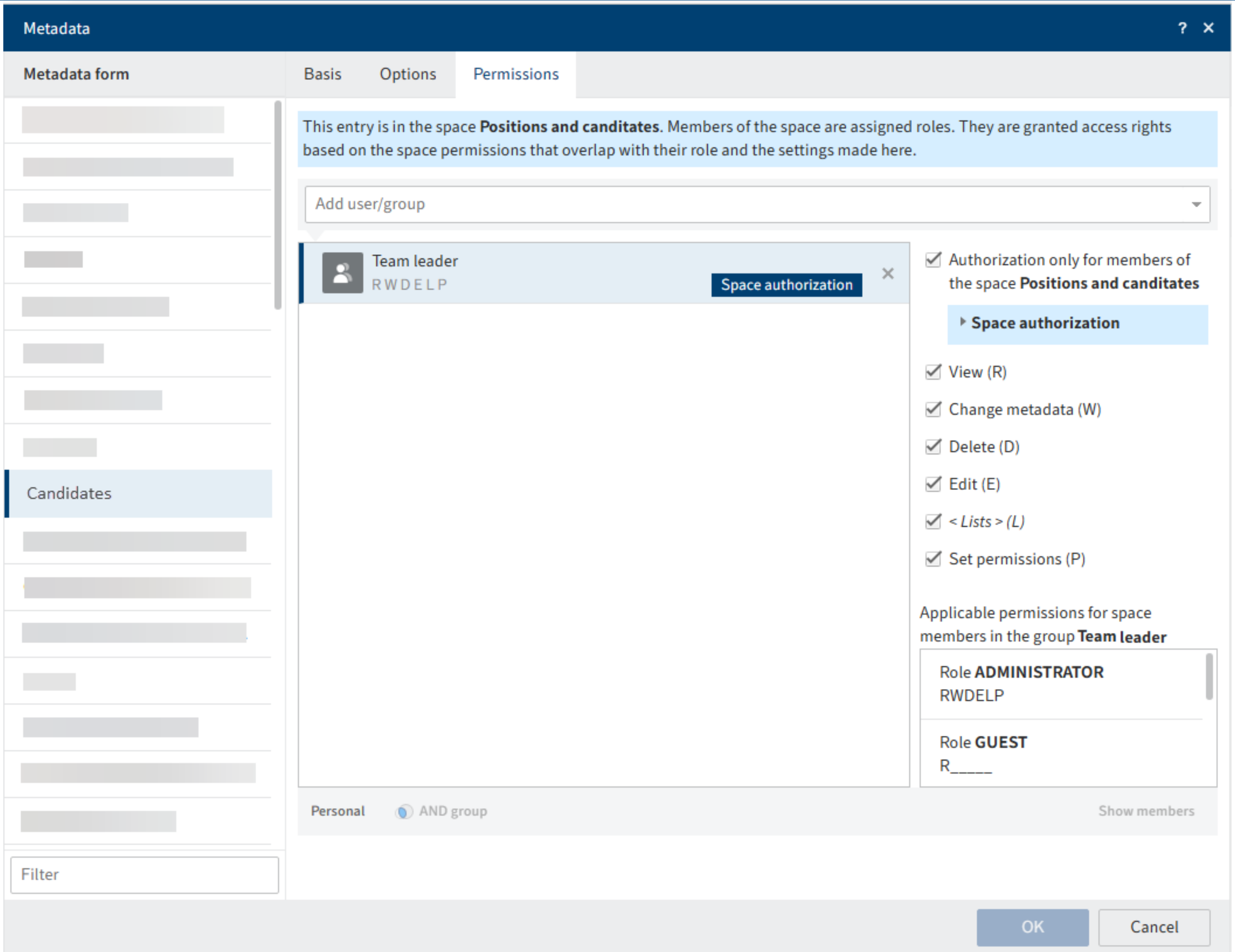
AND group: To create an AND group, select two groups in the middle column and select *AND group*. AND groups only give permissions to the users who are members of both groups.

Show members: To show the members of a group, select the group, then select *Show members*.

Permissions for entries in spaces

There are additional authorization options for entries that were created in a space.

You can find more information on spaces in the Spaces section.



Authorization only for members of the space<space name>: Users and group members granted this permission can only access the entry if they are members of the corresponding space.

Information

This option only appears for entries created in a space. For entries created elsewhere but displayed in a space, the permissions of the entry in the repository apply.

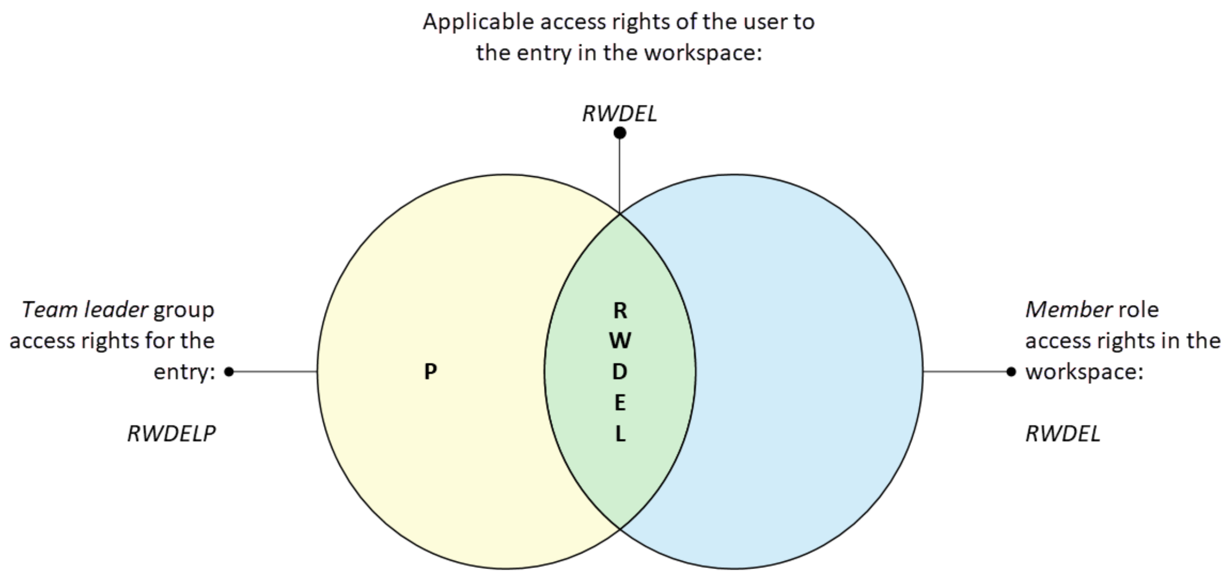
If you enable this option, the permissions granted to group members according to their role in the space overlap with the access rights granted in the *Metadata* dialog box.

The permissions to the entry at the individual user level also overlap in accordance with this.

You can see the permissions in effect when you select a user or group in the *Metadata* dialog box.

Example

A user has the *Member* role in the *Positions and candidates* workspace. Members have *RWDEL* access rights for entries. The user is also a member of the *Team leader* group. In the *Metadata* dialog box, this group has all access rights for the entry.

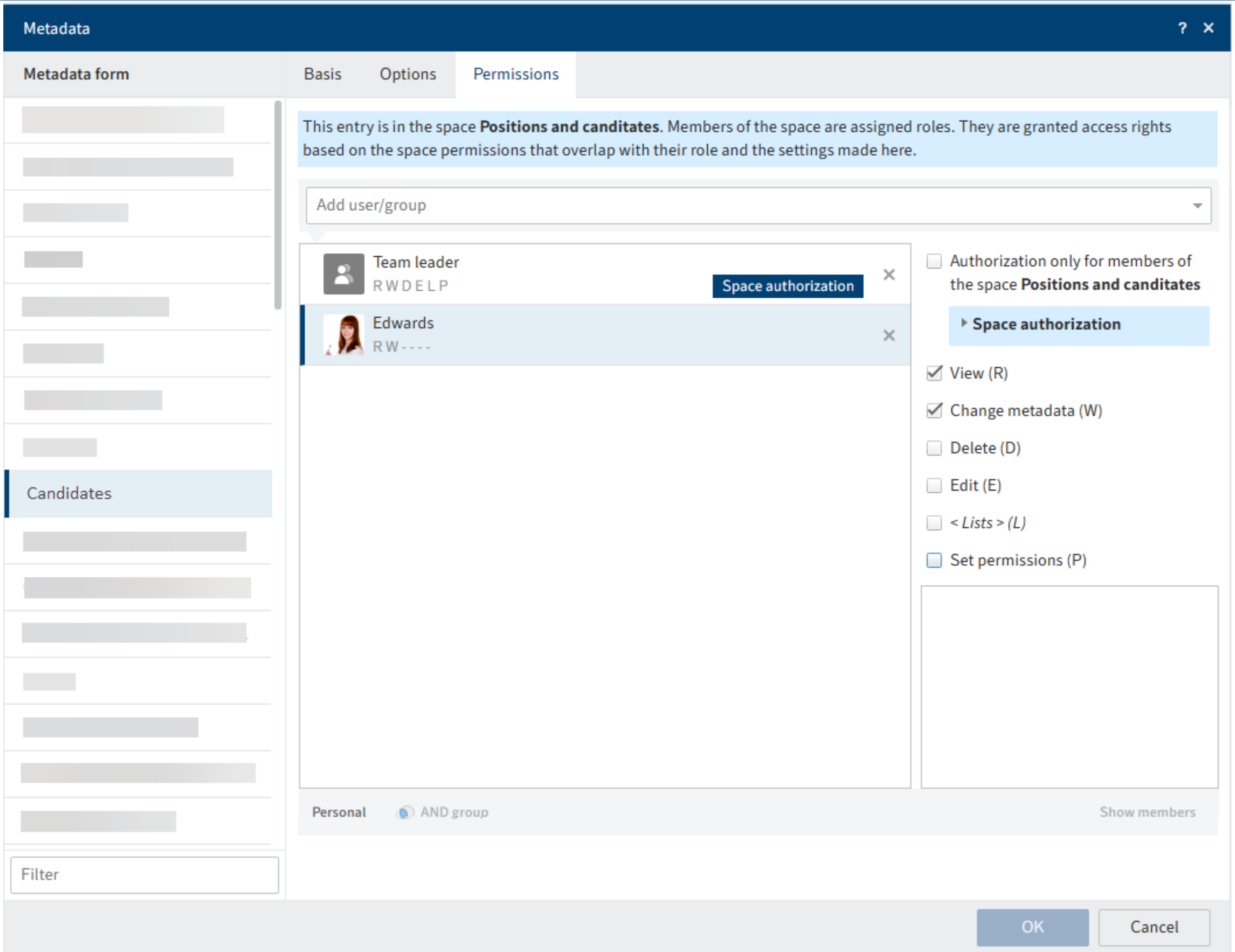


The user only has *RWDEL* access rights for this entry because only these access rights overlap.

Other members of the *Team leader* group will not have access to the entry unless they are also members of the workspace.

Grant a non-member access to an entry

You can grant users who are not members of a space access to entries in the space. Users can open these entries from the search or with ELO links, for example.

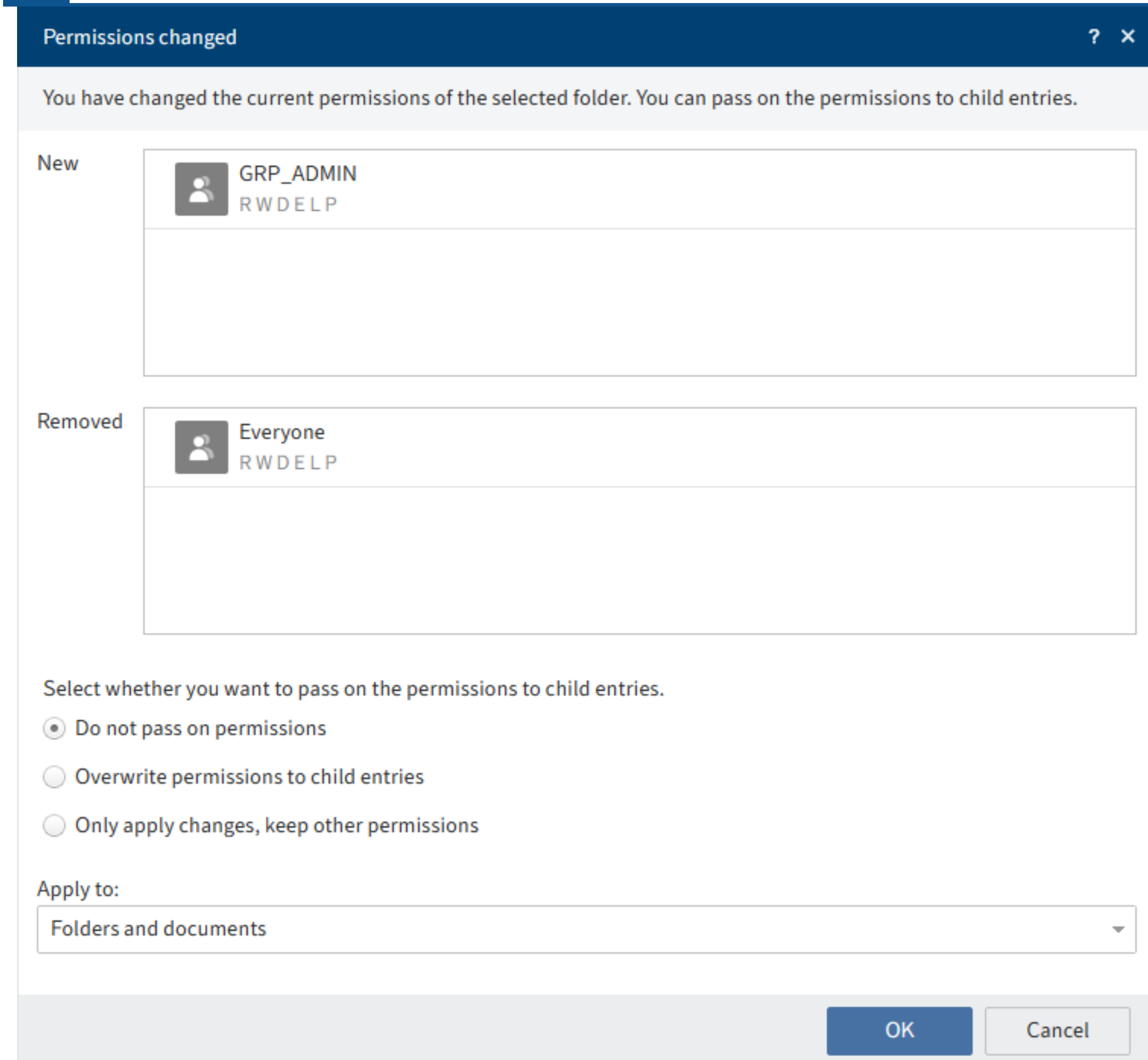


Example

The head of HR wants to grant a head of department access to an application created in the HR workspace. The head of department needs to be able to read the application and edit the metadata. The head of HR can add the head of department on the *Permissions* tab and assign him the *R* and *W* access rights.

Outlook

If you change the permissions of a folder in the *Metadata* dialog box, the new permissions can be passed on to the child entries (child folders and documents). After you have changed the permissions, the *Permissions changed* dialog box opens. Specify what effects this change should have.



Please note

The changes do not affect references, since they retain the permission settings of the original entry.

Choose from the following options:

Do not pass on permissions: The changes are not applied to the documents and child folders in the folders.

Pass on permissions to child entries: All permissions are passed on to the entries in the folder.

Only apply changes, keep other permissions: Only permissions are passed on that result in changes to permissions for the documents and child folders in the folder.

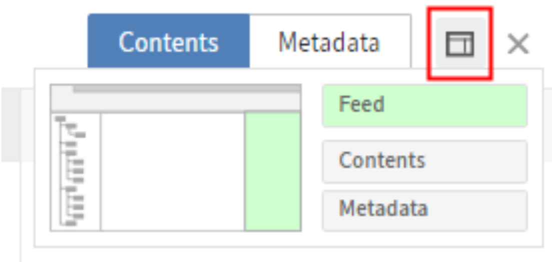
Apply to: Using the drop-down menu, select whether to apply the changes to all child entries or only folders/documents.

Enter metadata with ELO Click OCR

The integrated text recognition feature can be used as a tool for entering metadata. ELO Click OCR transfers text from a document into the metadata form. To use this method, you will have to save the document first. OCR works on TIF documents and in the image preview (*Ribbon > View > Image preview*).

Method

1. Select the document whose metadata you want to edit.



2. Configure the viewer pane so that you see both the metadata and the document.

   To learn how to do this, refer to the Viewer pane chapter.

3. Select *Edit* at the bottom of the metadata dialog box.
4. Select the field you want to copy the value from the document into.
5. Holding the CTRL key and left mouse button, draw a frame around the information in the document that you want to use for the metadata.

   > **Information**
   >
   > If you want to transfer multiple terms after another, select each individual term while holding CTRL + SHIFT + left mouse button. Release the mouse button after each term. Repeat the process until you have transferred all desired terms.

6. Release.

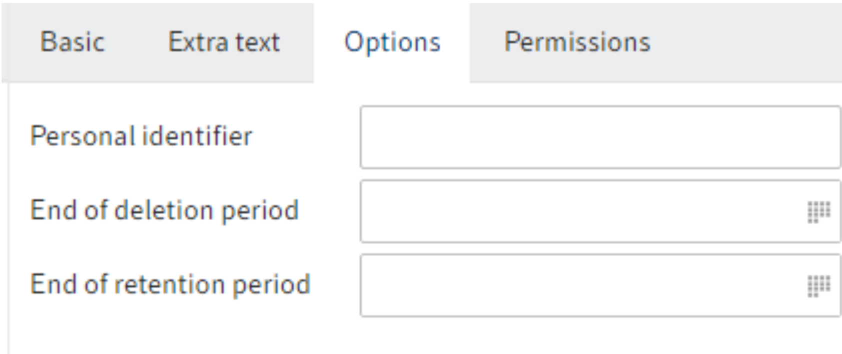
   ELO Click OCR reads the text contents of the selected area. The recognized text information is transferred to the selected field.

   > **Information**
   >
   > If you did not select a field, the recognized text is displayed in the *OCR* dialog box. You can copy the text you need and paste it to the Clipboard.

7.

Select *Save* to end editing mode and accept the changes.

Identify personal data



The *Options* tab in the *Metadata* dialog box contains three fields that allow you to find entries with personal data and delete them in due time.

Personal identifier: If the entry contains a personal identifier, enter information that enables you to identify the relevant person in this field. This term is intended to help you find the entry using the metadata search. For this reason, you need a company-wide system for assigning these terms. This will help you find entries containing a user's personal data. You can also search all entries containing personal data – regardless of the individual.

End of deletion period: Enter the date on which the entry must be deleted at the latest. This date must come after the date you have entered under *End of retention period*. You can select a date by clicking the calendar icon in the field.

End of retention period: Enter the date up to which the entry has to be retained. The entry cannot be deleted before the entered date.

Outlook

- For information on how to search for entries with personal data, see the chapter Search entries with personal data.
- For information on how to delete entries with personal data, see the chapter Delete entries with personal data.

Assign replication sets

The function *Assign replication sets* enables you to assign replication sets to entries in ELO. Replication sets allow you to synchronize data between multiple locations. The replication sets must have already been mapped to the entries with the *ELO Replication* module.

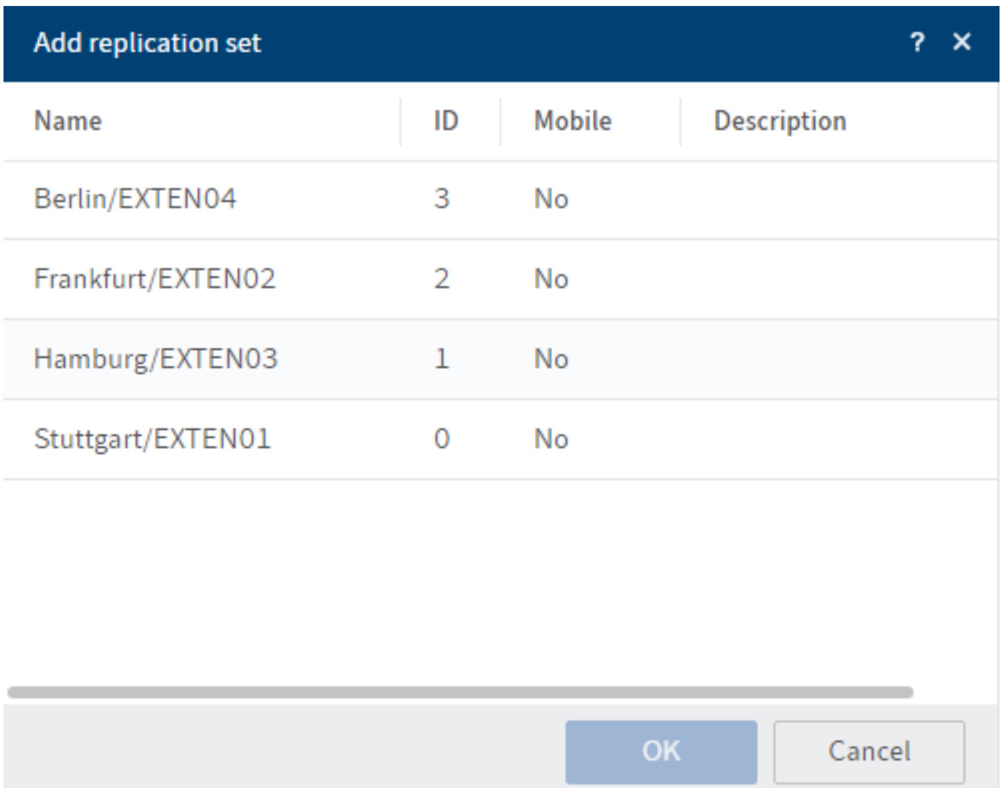
> **Information**
>
> You only have to assign replication sets at one site. The assigned replication sets are configured at the other locations through replication.

Method

Please note

Replication sets are inherited upward to parent folders in the repository structure. To prevent inheritance, select the Start point for replication option for the entry you want to replicate (*Organize > Metadata > Options*).

1. Select the entry you want to assign a replication set.
2. On the ribbon, select *Organize > Properties > Assign replication sets*.
3. Select *Add*.

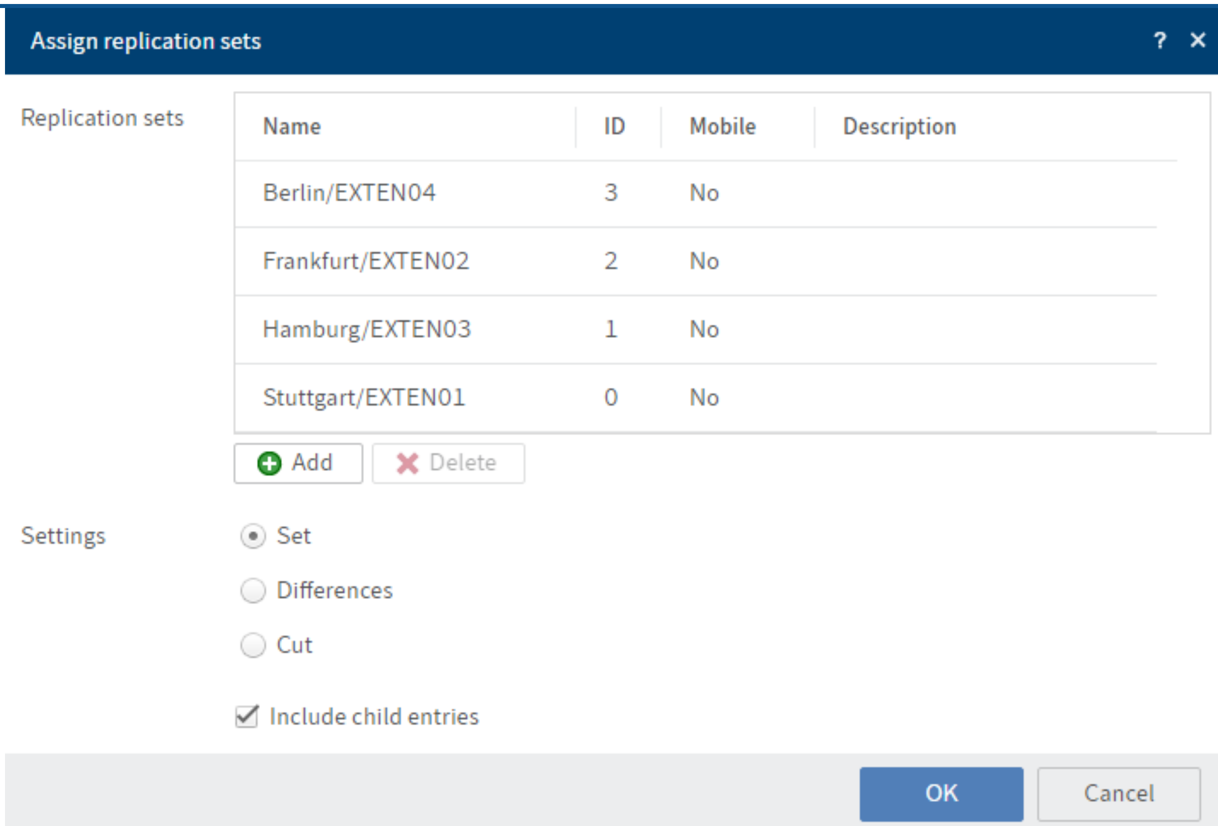


In the dialog box *Add replication sets*, you will see the replication sets defined in the configuration. The name of the replication set is made up of the location name and the name of the repository.

Information

The local replication set, that is the replication set where the entries are located, is assigned automatically. You do not have to add it manually.

4. Select one or more replication sets.
5. Select *OK*.



The selected replication sets appear in the *Assign replication sets* dialog box.

The following options are available:

- Set: All the listed replication sets are assigned to the entry.
- Differences: If you removed a replication set from the list and/or added a replication set to the list, this change is passed on to the entry. Replication sets from the list that were not changed are not passed on. The replication sets of the entry that were not changed are retained.
- Cut: The replication set is assigned to the entry selected. The replication sets that do not overlap are removed.
- Including child entries: If this option is enabled, the replication set is also assigned to the child entries of the selected entry.

6. Select *OK*.

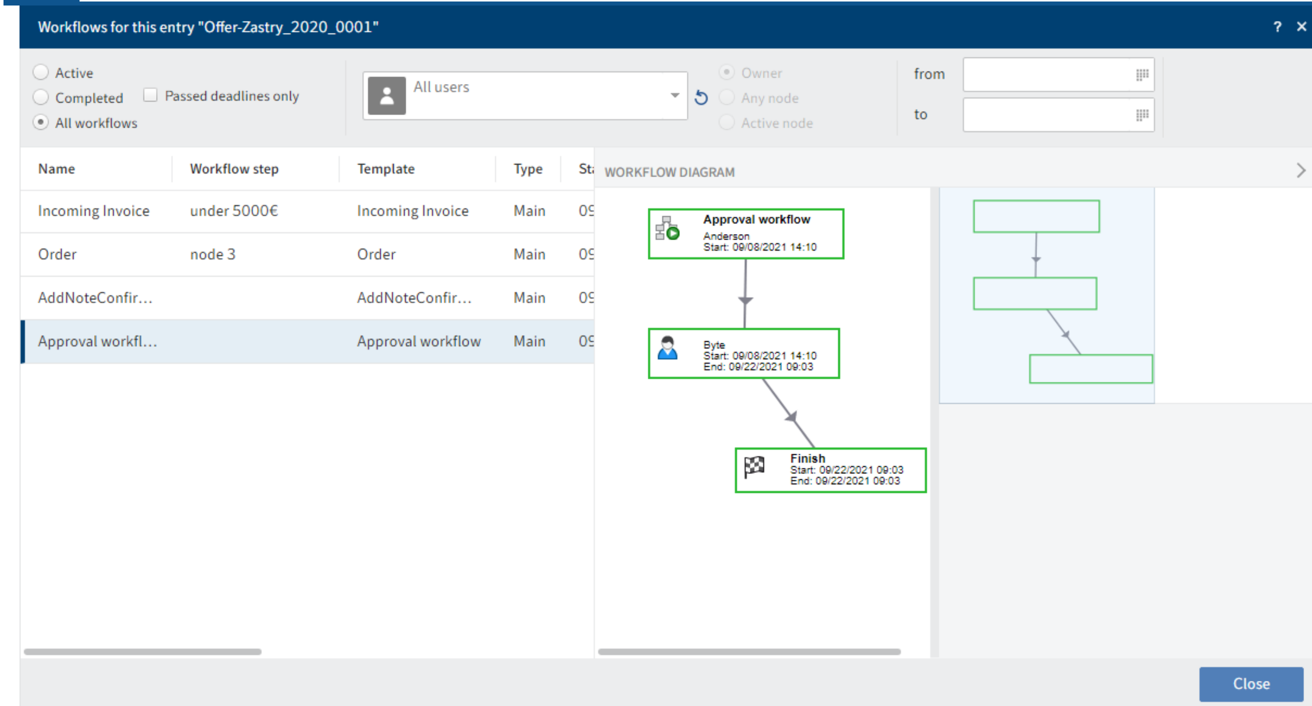
Workflows for this entry

With this function, you can display all workflows that have been started on a folder or document.

Method

1. Select the entry whose workflows you want to view.

2. On the ribbon, select *Organize > Workflows for this entry*.



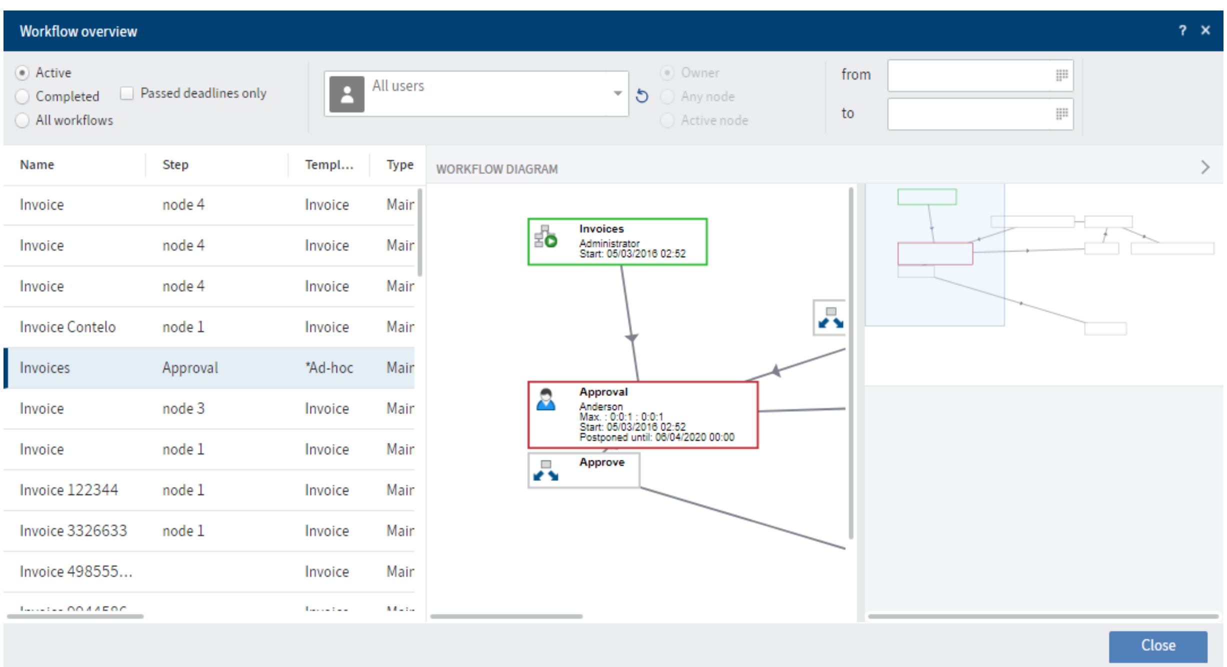
These settings are the same as the settings for the Workflow overview function.

Workflow overview

With this function, you can view all workflows that have been started and that you have permissions for.

Method

1. On the ribbon, select *Organize > Overviews > Workflow overview*.



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

2. Configure the settings to specify how you want the workflows to 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*.

User: You can select a user/group from the drop-down menu.

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.
- Any node: If this option is enabled, you only see workflows in which the selected user/group is 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: With the *From* and *To* fields, you can specify how long you want the workflow to be shown. The start date of the workflow must be within this period.

If you click the blue square in the minimized view of the workflow and move it while keeping the mouse button pressed down, you can change the section shown in the large view.

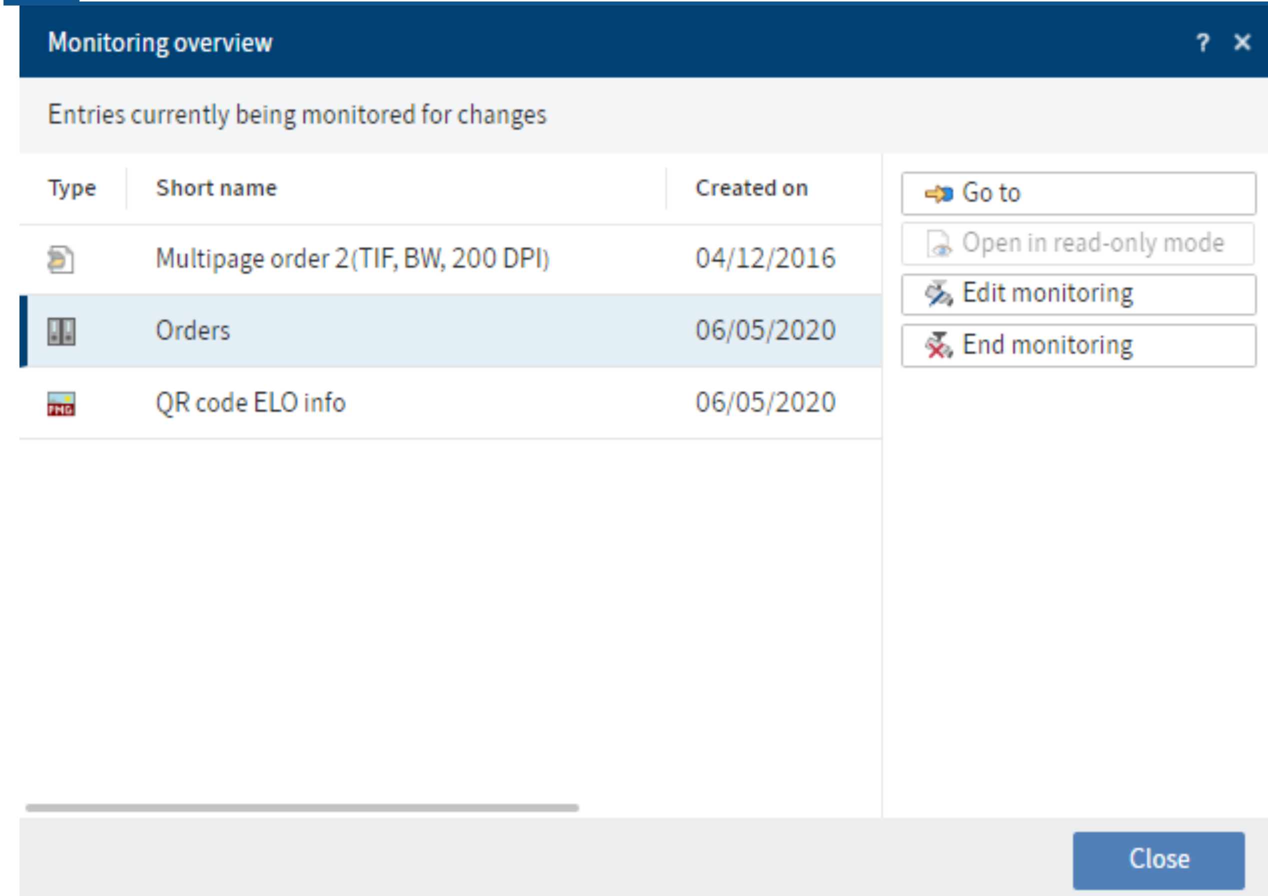
Select a workflow node in the workflow diagram to get more information on the node settings.

Monitoring overview

This function gives you an overview of all entries you are monitoring.

Method

On the ribbon, select *Organize > Overviews > Monitoring overview*.



The functions in the dialog box become active as soon as you select a monitored object.

- Go to: This takes you to the monitored folder or document in the *Repository* work area.
- Open in read-only mode: If you select a document that is being monitored, you can open it in read-only mode. If the entry you select is a dialog box that is being monitored, this button is grayed out.
- Edit monitoring: The same dialog box as for creating a monitored object appears for editing.
- End monitoring: Monitoring is ended without any further confirmation.

Delete

The *Delete* function allows you to delete folders or documents as well as tasks.

> **Information**
>
> Workflows cannot be deleted from the Tasks work area. Workflows have to be forwarded.

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

> **Important**
>
> This only assigns entries a deletion marker and does not delete them permanently. It is not possible to delete an entry permanently in the ELO Web Client. 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.

Alternative

Depending on the settings, the folders or documents are automatically removed from ELO as soon as they have reached the end of their retention period.

You can enter the retention period in the metadata when filing a document.

Method

1. Select the entry or task you want to delete.
2. Select *Organize > Delete* on the ribbon.

Result

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

If you delete a task, it is deleted permanently.

Delete entries with personal data

The purpose of marking entries with personal data is to be able to delete the corresponding entries in accordance with legal requirements.

Method

1. To delete entries with personal data, first perform a search. You can narrow down your search based on the *End of deletion period* or *End of retention period* fields.
2. In the search results, select the entries that have to be deleted. To select multiple entries, press the CTRL key and select the corresponding entries. If you want to select all entries or all entries you want to select are in a row, press the SHIFT key then select the top-most and bottom-most entry you want to select.
3. Once you have marked the entry or entries in the search results, select *Organize > Delete* on the ribbon.

Result

The entries can no longer be seen in the repository.

Important

The entries are not deleted permanently, just marked as deleted. This tells the administrator that the documents need to be removed from ELO permanently.

'Task' tab

This tab appears when you are in the *Tasks* work area.

You can use the functions here to edit your tasks.

Refresh

If you select *Task > Refresh* on the ribbon, changes recently made by other users are immediately applied.

This means that tasks can disappear from the task list in your *Tasks* work area if they have been accepted by other users in the meantime.

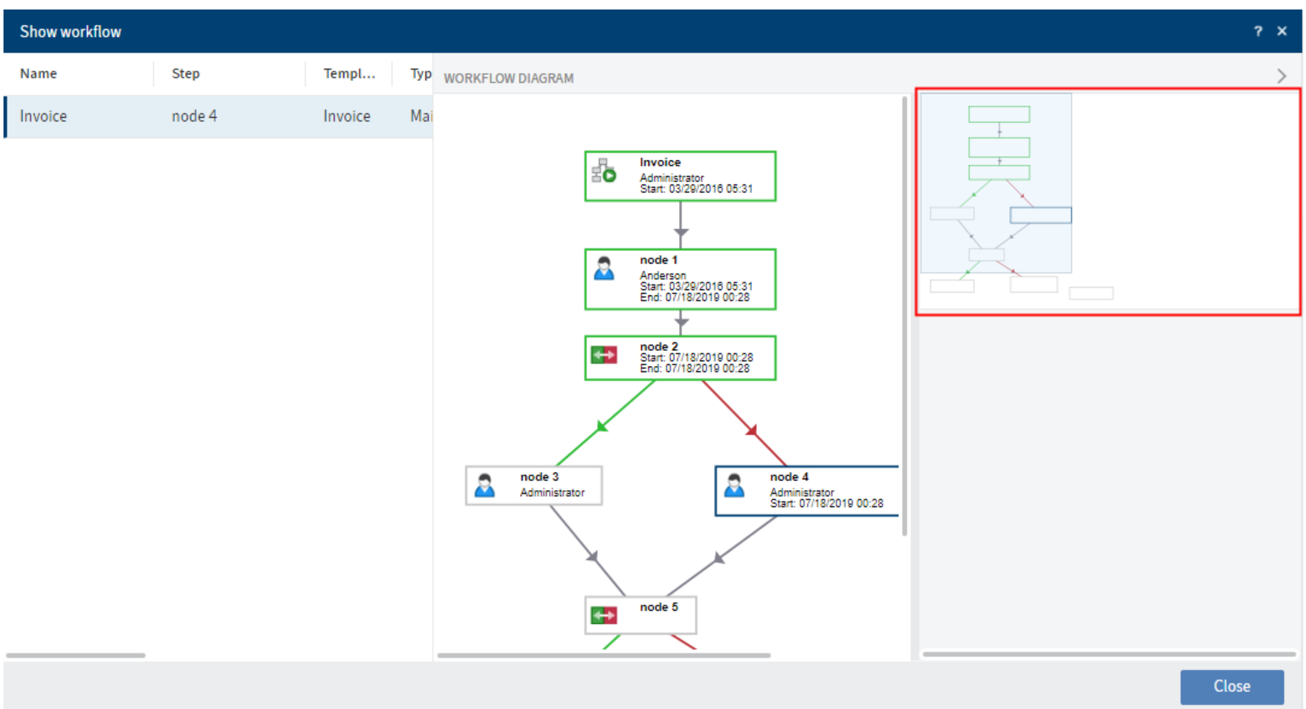
Show workflow

This function allows you to view details of the selected workflow.

Method

1. Select the workflow you want to view.

2. On the ribbon, select *Task > Show workflow*.



Result

You can see all steps of the workflow in the *Show workflow* dialog box.

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

If you click the blue square in the minimized view of the workflow and move it while keeping the mouse button pressed down, you can change the section shown in the large view.

Select a workflow node in the workflow diagram to get more information on the node settings.

Forward workflow

To learn how to forward a workflow, refer to the chapter Forward workflow.

Accept workflow

If you have received a workflow as part of a group, you have to accept it before you can process and forward it. This prevents the workflow from being processed by multiple users at once.

Method

1. Select the workflow that you want to accept.

2. On the ribbon, select *Task > Accept workflow*.

Result

Once the workflow is accepted, it is removed from the *Tasks* work area of the other group members.

Outlook

- Use the Return workflow function to undo this action.
- To forward the workflow, use the function Forward workflow or the form.

> **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.

Return workflow

You can return a workflow you received as a group member and accepted with the *Accept workflow* function.

Related functions

- Delegate workflow
- Hand off workflow
- Postpone workflow

Method

1. Select the workflow you want to return.

2. On the ribbon, select *Task > Return workflow*.

Result

The workflow now appears in the Tasks work area of all group members the workflow was sent to.

Delegate workflow

You can delegate your workflow step to other users or groups.

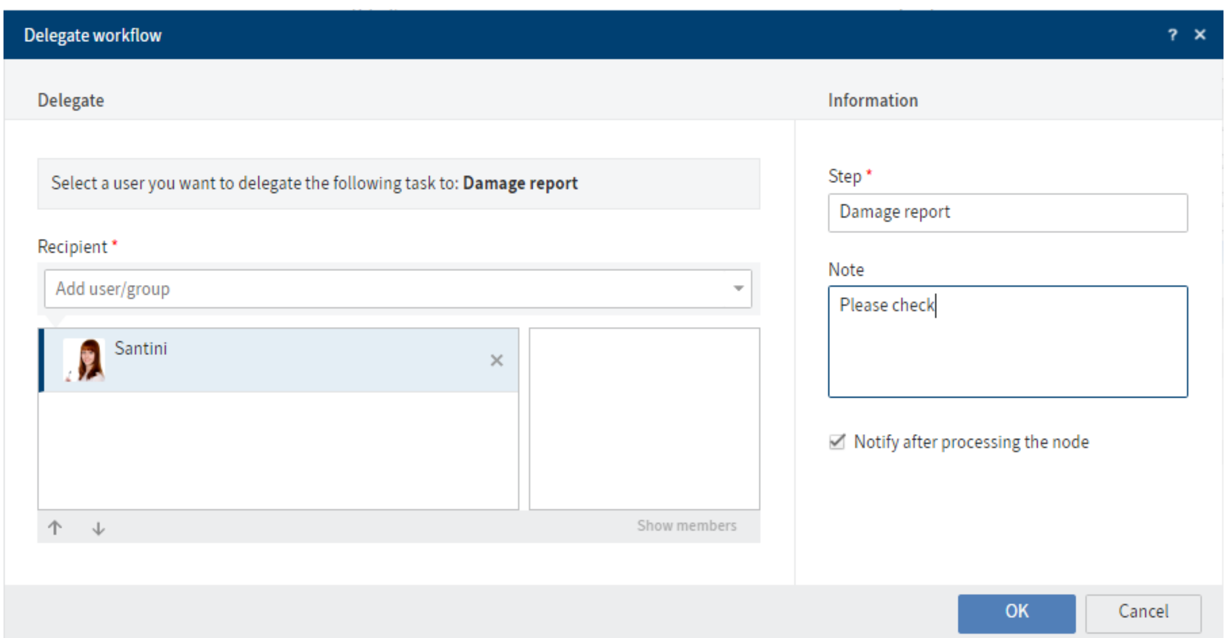
Related functions

- Return workflow
- Hand off workflow
- Postpone workflow

Method

1. Select the workflow that you want to delegate.

2. On the ribbon, select *Task > Delegate workflow*.



3. Make the required settings.

   As recipient, you can select one user or group, or multiple users or groups. If you select multiple users or groups, they will receive the workflow in the order in which they appear in the list. To change the order of recipients, select a recipient and change their position using the up and down arrows.

Show members: If you select a group, a list of members appears.

Notify after processing the node: You will receive a notification after the workflow is processed. This gives you the opportunity to check the workflow status before you forward it to the next recipient.

4. Select *OK*.

Result

The workflow is handed off according to your settings.

In the workflow overview under *Show workflow*, you will still be shown as the owner of your step. The users you have delegated the workflow to represent an additional step.

Hand off workflow

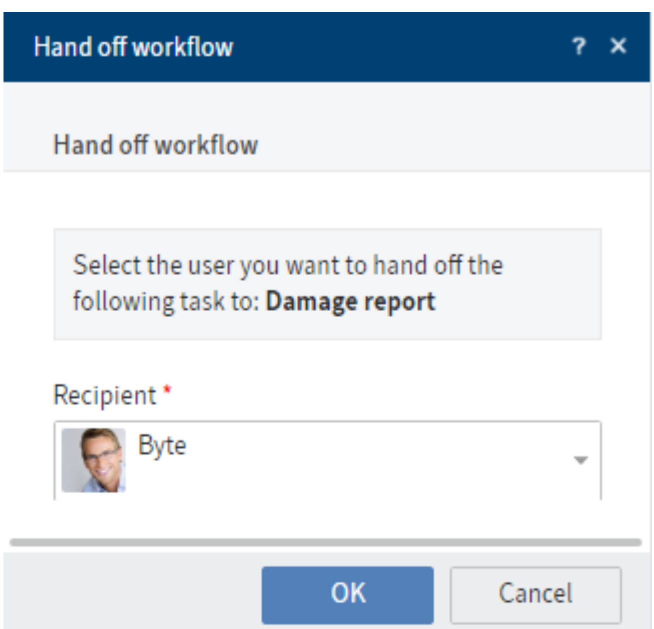
You can hand off your workflow step to another user or group. Unlike the *Delegate workflow* function, you hand off your processing step entirely and are no longer notified regarding the progress of the workflow.

Related functions

- Return workflow
- Delegate workflow
- Postpone workflow

Method

1. Select the workflow that you want to hand off.
2. On the ribbon, select *Task > Hand off workflow*.



3.

Select *OK*.

Result

In the workflow overview under *Show workflow*, you are no longer shown as the owner of your step. You will be replaced by the user you have handed off the workflow to.

Postpone workflow

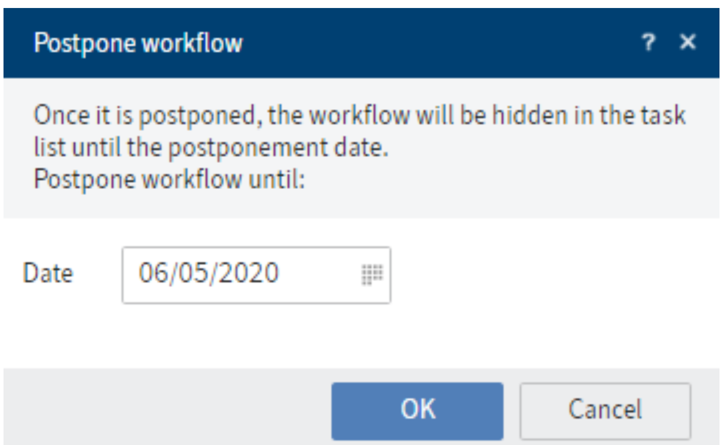
You can postpone the workflow to process it at a later time.

Related functions

- Return workflow
- Delegate workflow
- Hand off workflow

Method

1. Select the workflow that you want to postpone.
2. On the ribbon, select *Task > Postpone workflow*.



3. In the *Postpone workflow* dialog box, specify the date you want to postpone the task up to.
4. Select *OK*.

Result

The workflow disappears from your task overview.

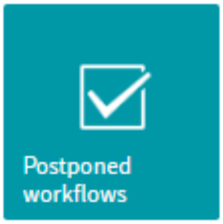
Outlook

- When this date is reached, the workflow reappears in your *Tasks* work area.
- You can show or delete postponements.

Cancel postponement

To cancel a postponement, you need a task view that shows your postponed workflows. Learn how to create this type of task view in the chapter Show postponed workflows.

Method



1. Select the tile on your *My ELO* home screen that takes you to your postponed workflows.

2. Select the workflow you want to cancel the postponement for.

3. On the ribbon, select *Task > Edit > Cancel postponement*.

Result

The postponement is canceled. The workflow reappears in the *Tasks* work area.

Edit reminder

You can change existing reminders once they are in your *Tasks* work area.

You can learn how to create reminders in the chapter Reminder.

Method

1. Select the reminder you want to change.

2. On the ribbon, select *Task > Edit > Edit reminder*.

3. Make the changes as required.

4. Select *OK*.

Result

If you change a reminder, the changed reminder will appear in your Tasks work area and overwrite the previous entries made to the reminder.

Reminders you have created for other users can no longer be changed. If you have created a reminder for yourself and other users and add the other users via *For user/group*, their reminder is not changed. Instead, the other users receive a new reminder.

Mark as unread

New unread tasks are denoted with a green dot. Once you have selected the task, the green dot disappears. If you want to remind yourself that you haven't worked on a task yet, you can mark it as unread again.

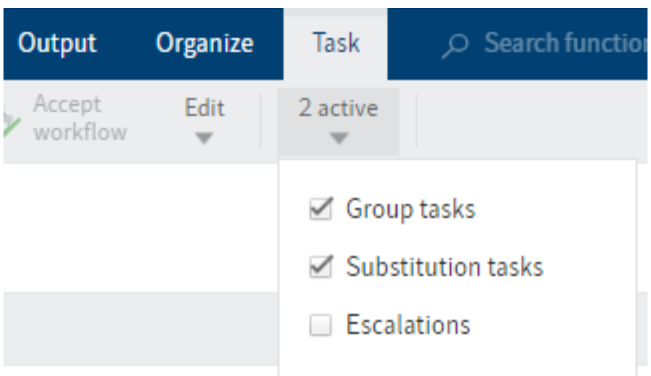
Method

1. Select the task you want to mark as unread.
2. On the ribbon, select *Task > Edit > Mark as unread*.

Result

The task is denoted with a green dot again until you select it.

x active



You can show tasks based on different criteria. On the ribbon, select *Task > x active*. Here, select whether you want to view group tasks, substitution tasks, or escalations.

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

Escalations: If you check this option, escalated tasks for which you have been entered as a user to be notified are shown. Using the Show workflow function, you can see what step resulted in the escalation.

'Document' tab

Open in read-only mode

This function allows you to view a document without having to save it locally.

> **Information**
>
> If this button is permanently grayed out, it is due to the administrative settings made for you.

Method

1. Select the document you want to open in read-only mode.
2. On the ribbon, select *Document > Open in read-only mode*.

Result

The document opens in a new tab in the browser or in an external program, depending on the administrative settings.

Edit in Microsoft Office

This function allows you to edit Microsoft Office documents.

Related functions

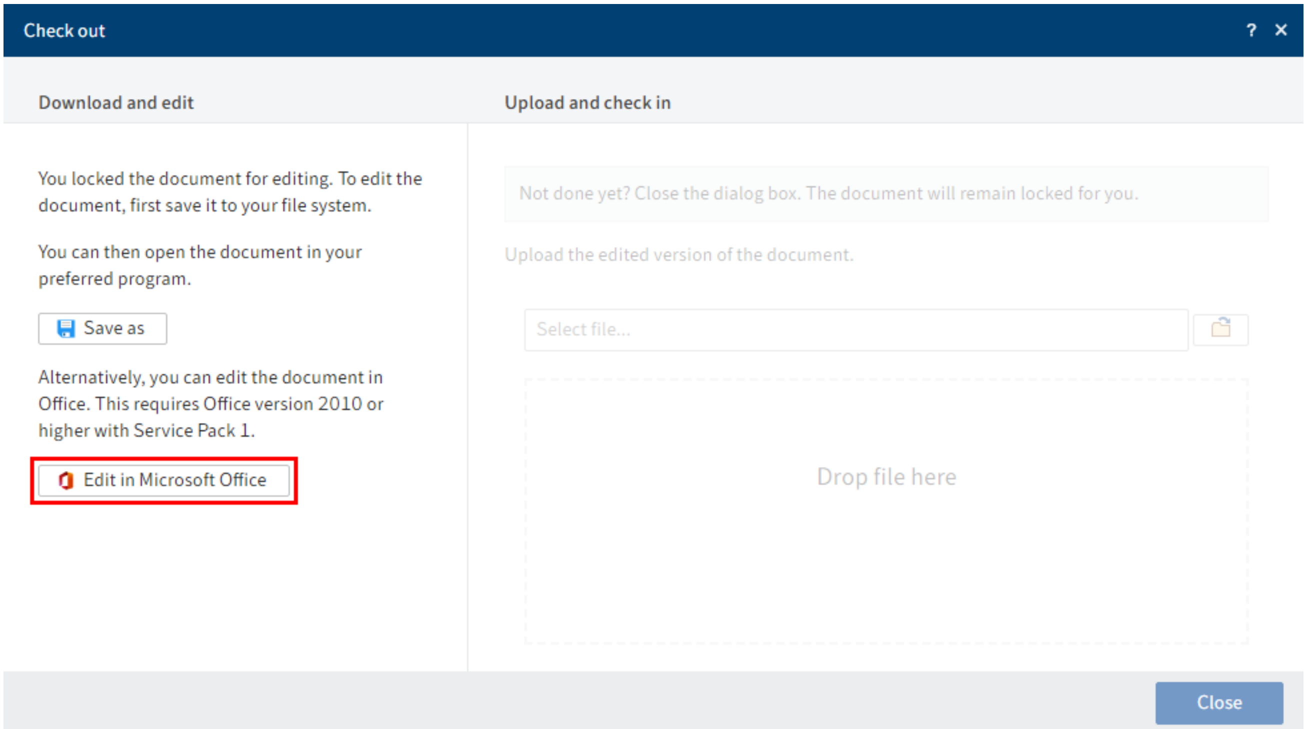
- Check out: This function allows you to edit Microsoft Office documents and all other document types.
- Check out to OneDrive: This function allows you to check out Microsoft Office documents to OneDrive and edit them alone or collaboratively.
- Edit online: This function allows you to edit Microsoft Office documents in your browser. This function is only available if you have installed the ELO Interface for Microsoft Office Online.
- Collaborate: This function allows multiple users to simultaneously edit a Microsoft Office document. This function is only available if you have installed the ELO Interface for Microsoft Office Online.

Method

1. Select the document you want to edit.
2. On the ribbon, select *Document > Edit in Microsoft Office*.

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

Alternative: Select *Document > Check out* and then *Edit in Microsoft Office*.



1. Confirm that the website is allowed to open the link.
2. Select *Open link*.

Result

The Microsoft Office document opens.

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

Outlook

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

Check out to OneDrive

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

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

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

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

Related functions

- Check out: This function allows you to edit Microsoft Office documents and all other document types.
- Edit in Microsoft Office: This function allows you to open and edit Microsoft Office documents. The document is not opened in the browser but in an external program.
- Edit online: This function allows you to edit Microsoft Office documents in your browser. This function is only available if you have installed the ELO Interface for Microsoft Office Online.
- Collaborate: This function allows multiple users to simultaneously edit a Microsoft Office document. This function is only available if you have installed the ELO Interface for Microsoft Office Online.

Method

1. Select the document you want to edit.

2. On the ribbon, select *Document > Check out to OneDrive*.

Result

The document is opened in a new browser tab.

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

Changes are automatically saved in Microsoft OneDrive.

Other options:

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

Outlook

- To save a new document version, close the document and select the *Upload and check in* button. The document is directly selected in the dialog box.
- If you want to continue editing the document at some point without checking it in, you can always open it from the following folder: *OneDrive > Apps > <Name of target folder>*.

Please note

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

Edit online

This function allows you to open and edit Microsoft Office documents in your browser.

This function is only available if you have installed the ELO Interface for Microsoft Office Online.

Related functions

- Check out: This function allows you to edit Microsoft Office documents and all other document types.
- Edit in Microsoft Office: This function allows you to open and edit Microsoft Office documents. The document is not opened in the browser but in an external program.
- Check out to OneDrive: This function allows you to check out Microsoft Office documents to OneDrive and edit them alone or collaboratively.
- Collaborate: This function allows multiple users to simultaneously edit a Microsoft Office document. This function is only available if you have installed the ELO Interface for Microsoft Office Online.

Method

1. Select the document you want to edit.
2. On the ribbon, select *Document > Edit online*.
3. Select the program you want to open the document in.
4. Confirm that you trust the source of the file.

Result

The document is opened in a new browser tab.

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

Outlook

You do not have to check the document back in. Once you close the tab containing the document, the changes are saved in ELO.

Collaborate

This function allows you to open Microsoft Office documents in your browser and work on them with other users.

This function is only available if you have installed the ELO Interface for Microsoft Office Online.

Related functions

This function is the only one that allows you to edit a document at the same time as other users.

If you want to work on a document on your own, you have the following alternatives:

-

Check out: This function allows you to edit Microsoft Office documents and all other document types.
- Edit in Microsoft Office: This function allows you to open and edit Microsoft Office documents. The document is not opened in the browser but in an external program.
- Check out to OneDrive: This function allows you to check out Microsoft Office documents to OneDrive and edit them alone or collaboratively.
- Edit online: This function allows you to edit Microsoft Office documents in your browser. This function is only available if you have installed the ELO Interface for Microsoft Office Online.

Method

1. Select the document you want to edit.
2. On the ribbon, select *Document > Collaborate*.

Result

The document is opened in a new browser tab. The *ELO Service* user is shown as the editor.

Outlook

You do not have to check the document back in. Once you close the tab containing the document, the changes are saved in ELO.

Check out

You can learn how to check out documents in the chapter Check out and edit document.

Related functions

- Edit in Microsoft Office: This function allows you to open and edit Microsoft Office documents. The document is not opened in the browser but in an external program.
- Check out to OneDrive: This function allows you to check out Microsoft Office documents to OneDrive and edit them alone or collaboratively.
- Edit online: This function allows you to edit Microsoft Office documents in your browser. This function is only available if you have installed the ELO Interface for Microsoft Office Online.
- Collaborate: This function allows multiple users to simultaneously edit a Microsoft Office document. This function is only available if you have installed the ELO Interface for Microsoft Office Online.

Upload and check in

You can learn how to check a document back in after editing in the chapter Upload and check in document.

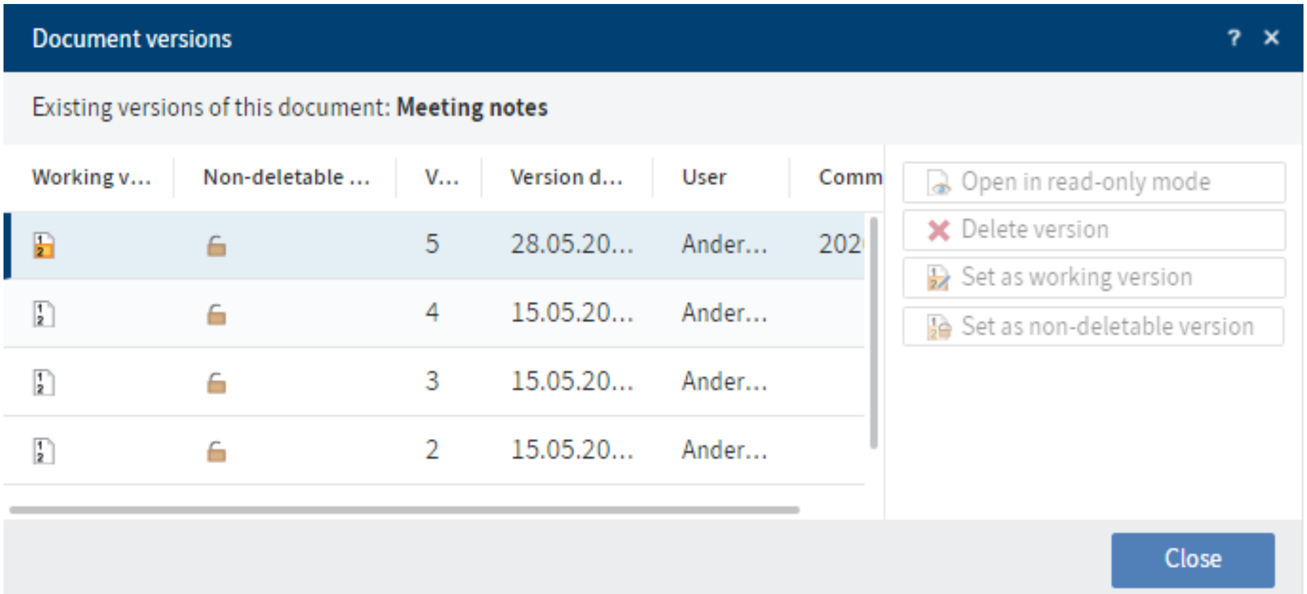
Document versions

Only one version of a document is shown in the repository. Unless it has been explicitly changed, the version you see in the repository is always the last version that was filed. You can use the

Document versions function to view the old versions or to set an older version as the current working version again.

Method

1. Select the document whose versions you want to view.
2. On the ribbon, select *Document > Versions > Document versions*.



You see all versions of the document in the *Document versions* dialog box.

You can recognize the current working version by the pen icon in the overview.

As soon as you select a version, the following buttons become active:

- Open in read-only mode: This function opens the selected version. You can open multiple versions to compare them with each other.
- Edit comment: When filing a version, you can enter a comment. You can edit it afterwards with this function.
- Set as working version: First, select the version you want to set as the new working version, then select the *Set as working version* button. The newly selected version is now shown in the *Repository* work area.
- Set as non-deletable: First, select the version you want to set as non-deletable, then select the *Set as non-deletable version* button. The version can no longer be deleted.
- Delete version

Load new version

Use this function to upload a new version of a document to your repository.

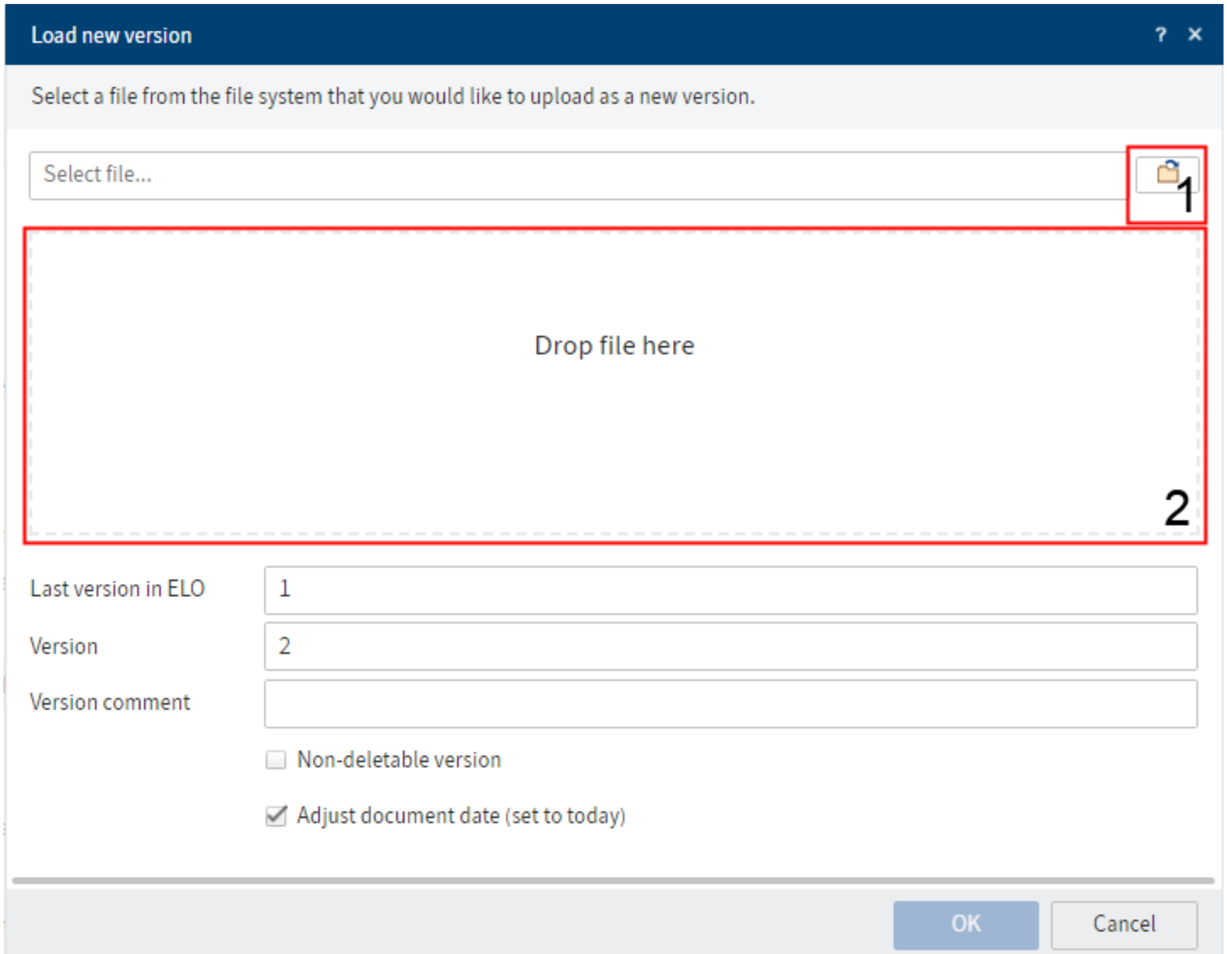
Related function

Drag-and-drop

Method

1. In ELO, select the document you want to upload a new version of.

2. On the ribbon, select *Document > Versions > Load new version*.



3. Select the file. You have the following options:

   1 Select the button to the right of the *Select file* field and select the file.

   2 Drag the file to the *Drop file here* area.

   Non-deletable version: If you enable this option, this version cannot be deleted. This does not mean that you cannot file a new version. You simply cannot delete it from the overview of document versions.

4. Select *OK*.

Result

The version you filed is the new working version.

Outlook

You can use the Document versions function to view the old versions or to set an older version as the current working version again.

Cancel editing

If you have checked out a document and do not want to make any changes to it after all, you can cancel editing with this function.

Method

1. In ELO, select the document you want to cancel editing for.

   The quickest way to find the document is through the In use work area.

2. On the ribbon, select *Document > Versions > Cancel editing*.

Result

The current version is retained. The document is unlocked.

General margin note

You can add margin notes to entries.

General margin notes can be created, seen, and edited by all users.

Related functions

- Personal margin note: You can learn how to create a margin note in this chapter.
- Permanent margin note

Personal margin note

You can add margin notes to entries.

Personal margin notes can only been seen and edited by the user who created them.

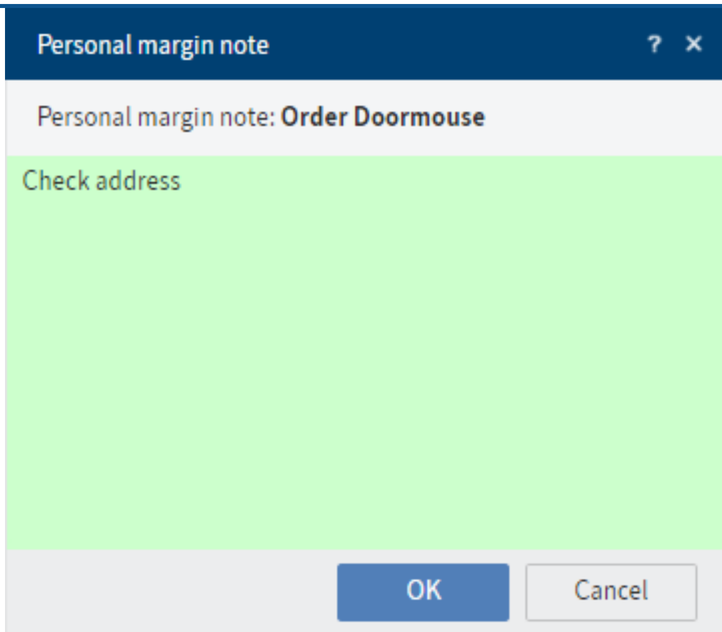
Related functions

- General margin note
- Permanent margin note

Method

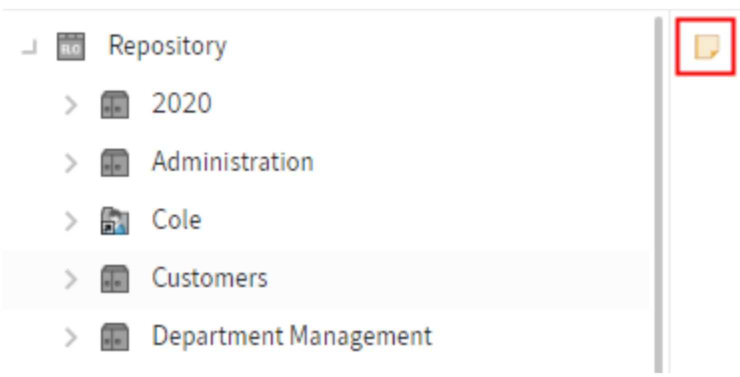
All types of margin notes are applied in the same way.

1. Select the document you want to apply a margin note to.



2. On the ribbon, select *Document > Margin notes > General/Personal/Permanent margin note*.

3. Enter the text for your margin note and confirm with *OK*.



Result

The margin note is displayed on the split bar. If you run the mouse over the margin note icon, the content of the margin note is displayed.

Open the margin note from the margin note icon to edit it, or to view it if it is a permanent margin note.

A margin note applies to the entire document and not just the current version.

Permanent margin note

Permanent margin notes cannot be edited or removed from the document once they are created. They are visible to all users. You can only delete a permanent margin note by deleting the document.

Related functions

-

Personal margin note: You can learn how to create a margin note in this chapter.

- General margin note

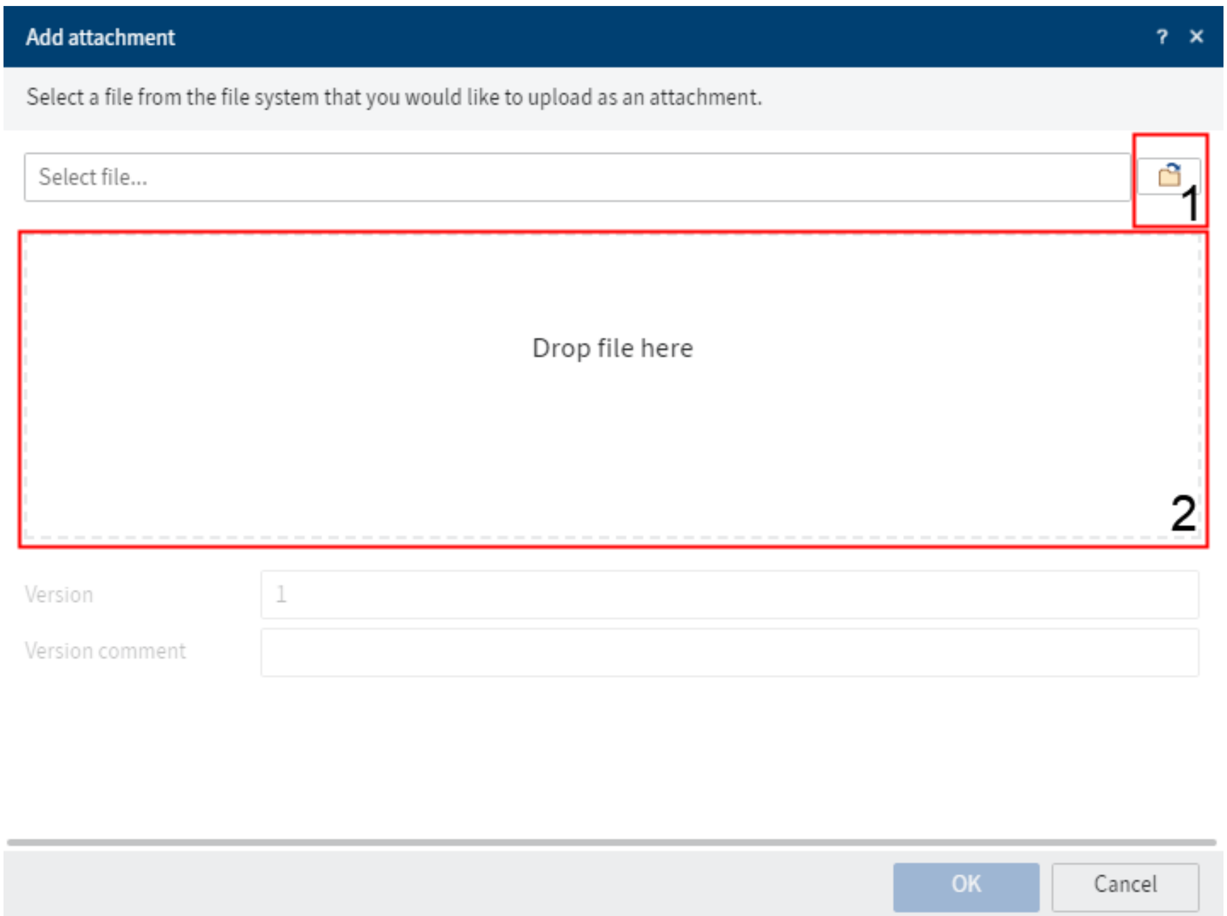
Attachment

You can add attachments to documents in ELO.

If the document already has an attachment, your attachment is not stored as the second attachment but as a new version of the existing attachment.

Method

1. Select the document you want to add an attachment to.
2. On the ribbon, select *Document > Attachment > Add attachment*.



3. Select the file in the *Add attachment* dialog box. You have the following options:

   1 Select the button to the right of the *Select file* field and select the file.

   2 Drag the file to the *Drop file here* area.

4. Select *OK*.

Result

The attachment is added to the document.

You will recognize an attachment by the button with the paper clip icon.

Outlook

To open the attachment, select the button with the paper clip icon.

Attachments open in the browser or in an external program, depending on the administrative settings. If attachments are set to open in your browser, you may not be able to open some documents in read-only mode.

With the Attachments function, you can view all versions of the attachment or delete versions.

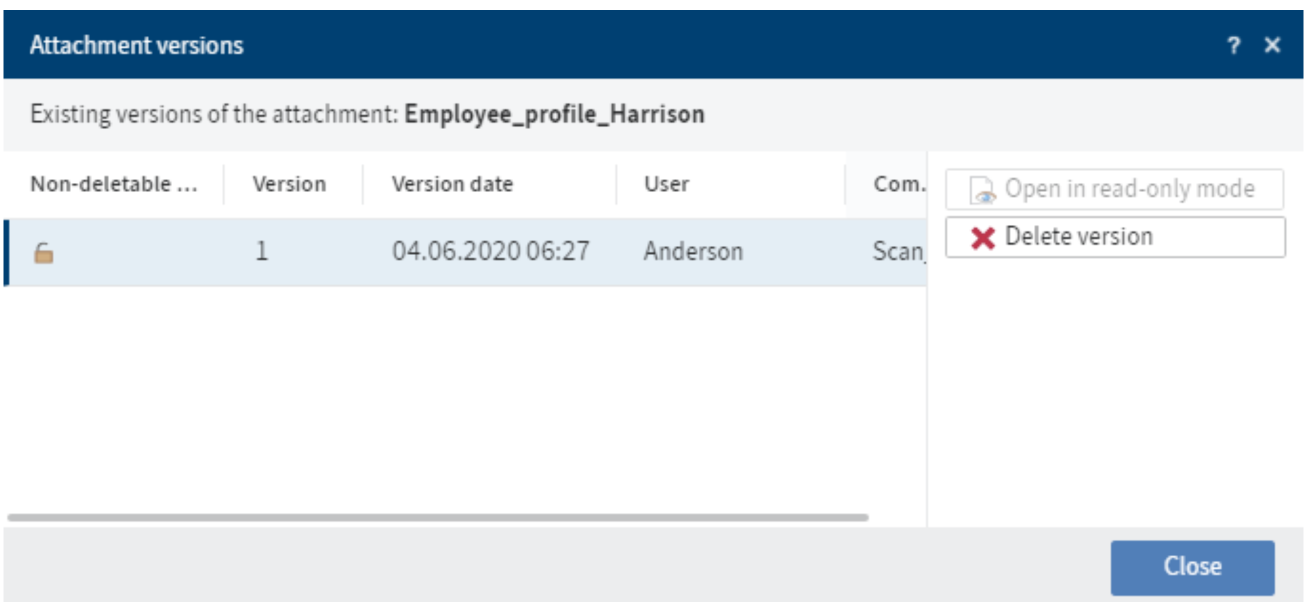
Attachments

If you select the paper clip icon, only one version of an attachment is shown. With the *Attachments* function, you can also view or delete old versions.

Method

1. Select the document whose attachments you want to open.

2. On the ribbon, select *Document > Attachment > Attachments*.



The *Attachment versions* dialog box provides an overview of the versions of the attachment.

When you select a version, the following buttons become active:

-

Open in read-only mode: This function opens the selected version in an external program. You can open multiple versions to compare them with each other. If this button is permanently grayed out, it is due to the administrative settings made for you.

- Delete version: If a version is not marked as non-deletable, you can delete it. Select the version and then confirm with *Delete version*.

Information

The ELO Java Client offers additional options. For example, attachments can only be marked as non-deletable in the ELO Java Client.

'Search' tab

This tab only appears when you are in the *Search* work area.

It contains functions that help you run a search or use a finished search.

For a description of the *Search* work area, refer to the chapter 'Search' work area.

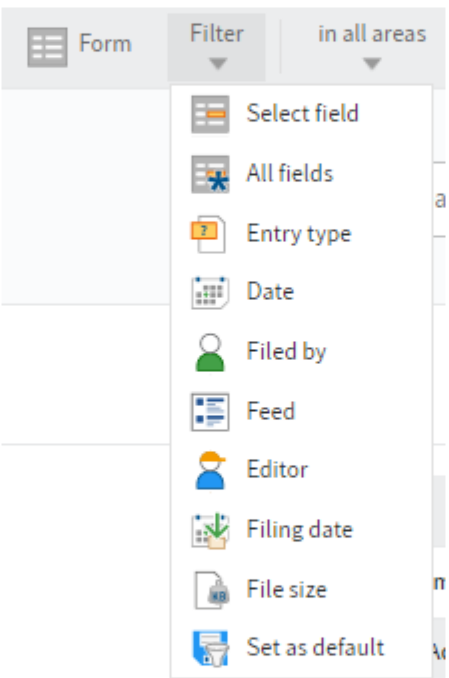
You can see an example of a search in the chapter Search entries.

Filters

Filters and facets allow you to narrow down your search using metadata, such as the filing date.

Filters and facets work in the same way. The only difference is how they are selected.

To learn how to select a facet, refer to the Narrow down search chapter.



Select the filter you want on the ribbon under *Search* > *Filter*. After you have selected it, specify the filter via the drop-down menu. To select a filter that has already been selected again, select the name of the filter.

> **Please note**
>
> If you search for `NOT`, `OR`, or `AND` via the search field or filters, you may encounter issues during your search.

'Date' and 'Filing date' filters

You can select a specific date or period of time using the drop-down menu.

Alternatively, you can enter a date (DD.MM.YYYY) or period of time in the field.

Enter period of time:

- Time: Enter a minus to search in the past. Enter a plus to search in the future. Additionally, enter a number that determines the length of the period of time.
- Unit: If you only enter a number in addition to the minus or plus sign, the unit searched for is `days`. If you put an `m` after the number, the unit searched for is `months`.
- Examples: `-14` searches for all entries in the last 14 days. `-6m` searches for all entries in the last six months.

Negate filters

You can apply reverse filters. For example, if you select a user and set the filter to *is not*, only entries that were not processed by this editor are shown. It is not possible to only negate individual filters or facets.

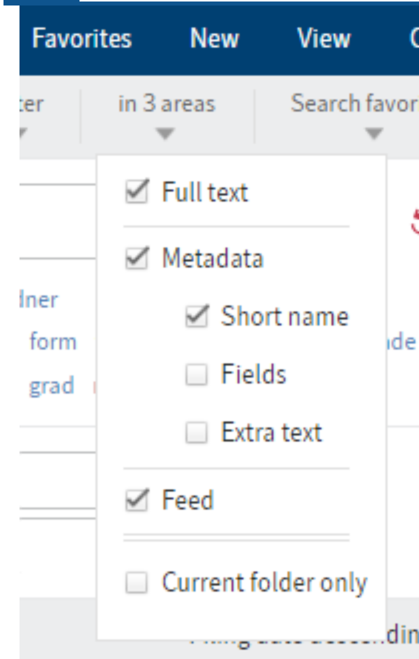
To negate a selected filter, right-click the filter and then click *is not*.

Set as default

This function saves your current search settings as the default. The default is restored when you reset the search.

Search in areas

You can limit your search to specific areas.



Configure this setting in the *In x areas* menu.

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

One search term:

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

Multiple search terms:

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

Current folder only

You can narrow down the search to a single folder.

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

Method

1. In the *Repository* work area, select the folder you want to search.
2. Switch to the *Search* work area.
3. On the ribbon, select *Search > In x areas > Current folder only*.
4. Configure the additional search settings.

Add favorite

You can create search favorites for searches you need frequently.

A search favorite creates a tile on your *My ELO* home screen that allows you to immediately launch a previously defined search.

Method

1. In the *Search* work area, configure the desired search settings.
2. On the ribbon, select *Search > Search favorites > Add favorite*.
3. Enter a meaningful name for the search favorite and save it.
4. Select *My ELO*.

   Result

   You will find your new tile in the *Hidden tiles* area.
5. Drag the tiles to the desired group.

   You will also find your search favorites in the *Search* work area on the ribbon under *Search > Search favorites*.

Outlook

You can overwrite or delete a search favorite.

- Overwrite: To overwrite a search favorite, enter the changed search settings in the *Search* work area. If the search favorite includes many settings and you only want to change a few, you can click the tile and perform the search. This way, you only need to make the changes and don't have to enter all settings. On the ribbon, select *Search > Search favorites > [Name of the search favorite] > Overwrite*.
- Delete: To delete a search favorite, on the ribbon, select *Search > Search favorites > [Search favorite name] > Delete*.

Search metadata

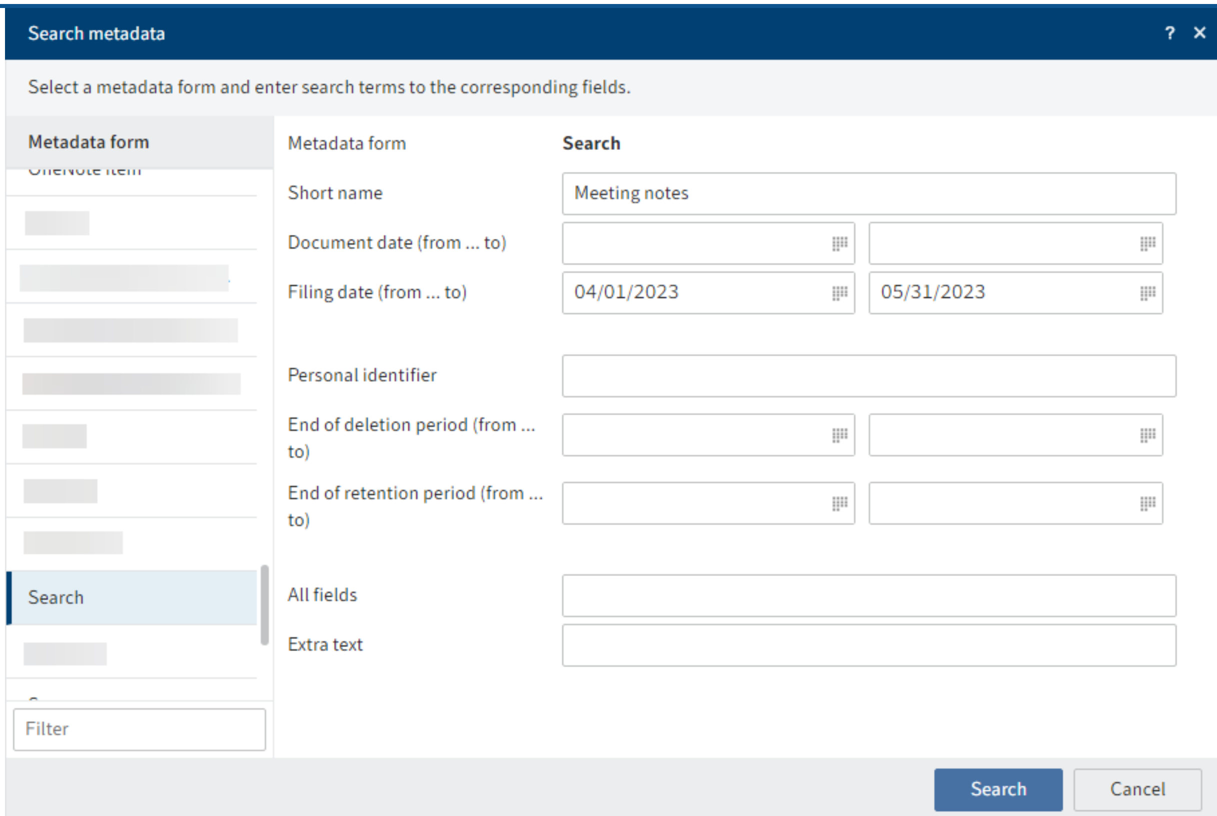
You can search the metadata of folders or documents.

This search is not as precise as the ELO iSearch but can provide faster results.

The metadata search allows you to specifically search for entries containing personal data.

Method

1. On the ribbon, select *Search > Search logic > Search metadata*.



2. Select which metadata you want to search. You have the following options:
    - All metadata forms: If you don't know which metadata form was used to file the entry, use the *Search* form. All metadata forms are searched.
    - One metadata form: If you know which metadata form was used to file the entry, use this form. Only the selected metadata form is searched.
3. Select *Search*.

Result

The results of your search are shown in the *Search* work area.

Outlook

- To return to ELO iSearch, select *Reset search* (red arrow button).
- To create a dynamic folder with your search, use the Dynamic folder function.
- To remove individual entries from your search result, use the Remove from search result function.

Search entries with personal data

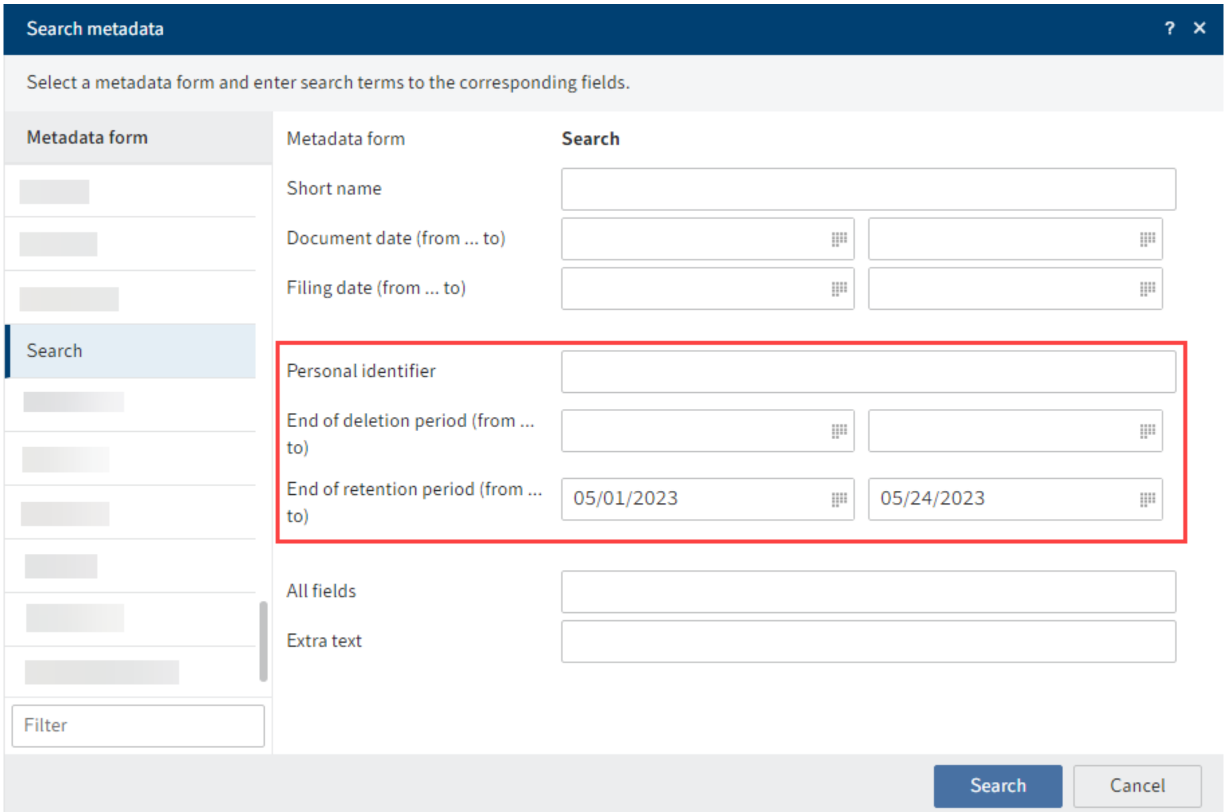
To find entries with personal data and delete them in due time, use the metadata search.

To learn how to identify personal data in an entry, refer to the chapter Identify personal data.

Method

1.

On the ribbon, select *Search > Search logic > Search metadata*.



2. In the *Personal identifier* field, enter the term you entered for the metadata. If you want to search all entries with a personal identifier, enter * in the search field.

3. Select *Search*.

Result

The results of your search are shown in the *Search* work area.

Outlook

For information on how to delete entries with personal data, see the chapter Delete entries with personal data.

Dynamic folder

Dynamic folders are folders whose contents change automatically. The contents of a dynamic folder are based on the results of a search. References to the search results are stored in dynamic folders.

Method

1. Perform a search.

2. On the ribbon, select *Result > Dynamic folder*.

3.

In the *Create dynamic folder* folder, select to select a target folder for your dynamic folder.

4. Select *OK*.

5. Enter metadata for the dynamic folder.

6. Select *OK*.

Result

The dynamic folder is created at the selected filing location. The current results of the search are immediately created as a reference.

Outlook

- The references automatically appear in or disappear from the dynamic folder if the search returns other results.
- You can also delete folders that you no longer need.

Remove from search results

You can remove individual entries from your search results.

Method

1. Perform a search.

2. Select the entry or entries you want to remove from the search results.

   You can learn how to select multiple entries in the chapter How do I select multiple entries?

3. On the ribbon, select *Result > Remove from search results*.

Result

The entries are removed from the list.

AI assistant (preview feature)

Please note

The AI assistant is not currently intended for use in production environments.

The AI assistant lets you analyze and edit recognized document content or use it in ELO using artificial intelligence.

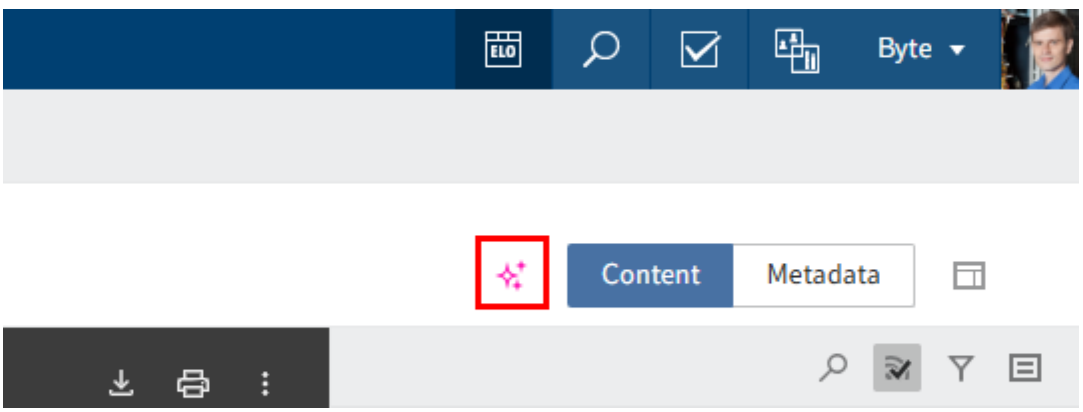
You can select predefined functions or enter your own questions and actions.

Information

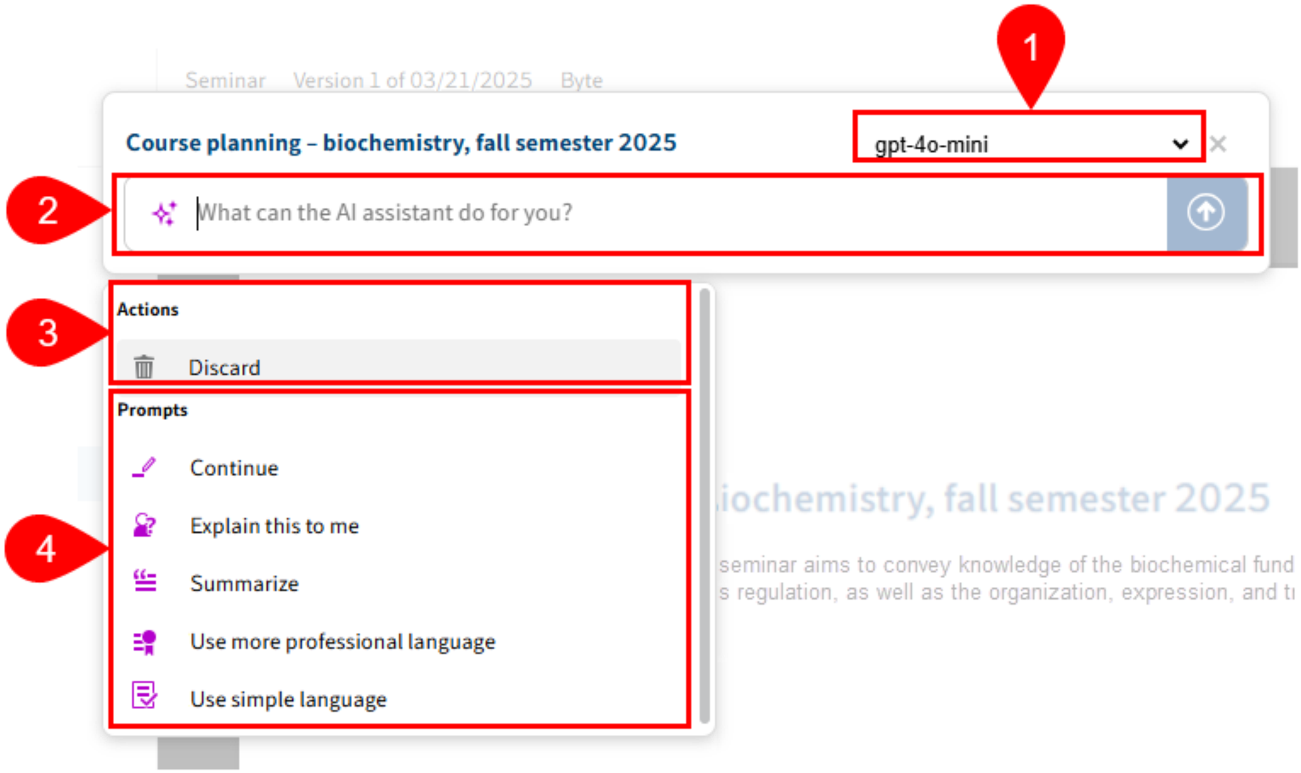
This preview feature has to be enabled and configured by an administrator before it can be used. Separate documentation is available for administrators.

Call

With the document open, select the AI assistant via the button with the sparkle icon or keyboard shortcut CTRL + spacebar.



Interface



1 Language model: Select a language model. Your administrator can configure multiple language models. Once a prompt has been submitted, the model is set for the chat. Open the AI assistant again to switch the model via the drop-down menu. If only one model is configured, no drop-down menu or model name are shown.

2 Input field: Submit a custom prompt for the document. If you have submitted multiple prompts for the document, you can navigate through the message history using the arrow keys.

3 Actions: Only *Discard* is available when you open the AI assistant. More actions appear once you have started a chat.

4 Prompts: The prompts are sent to the configured language model. Five preconfigured prompts are available as standard. Administrators can add more prompts.

Actions

The following actions are possible:

- Save data: This action is only offered during metadata extraction. It saves the values in the document's metadata.
- Start search: Triggers a search in the ELO repository using the response text. This action only makes sense with short responses. It can be used to search for customers in the repository, for example.
-

Create feed post: This can be used to document who has done what for tracking purposes. The feed post is visible after the repository has been refreshed.

- Try again: If the answer is not satisfactory, you can send the prompt to the language model again with the same context.
- Discard: All actions and prompts are discarded. The AI assistant closes.

Prompts

Preconfigured prompts

- Use simple language: The content of the document is written in a clear, easy-to-understand, and accessible way. This is done by using short sentences and simple words, and avoiding technical terms or complex sentence structures.
- Explain this to me: This prompt generates a concise and structured explanation of the contents of the document.
- Use more professional language: A more formal, objective, precise writing style is used. A neutral tone is used, as is common in business and academic communication. This instruction helps tailor content for professional audiences, such as for reports, official documents, or presentations.
- Continue: Prompts the AI assistant to continue a text it has started. The language model uses the style, tone, and content of the existing text to generate a consistent and thematically appropriate continuation.
- Summarize: Instructs the system to reduce the document to its key content. Main points, arguments, and events are presented in a condensed form.

> **Please note**
>
> If the AI assistant is unable to return document-specific responses, this may be because it is unable to access the document's full text. Go to *Metadata > Options* and check whether *Add to full text* is enabled.

Prompts created by administrators

Administrators can add more prompts (called custom prompts). You will recognize this type of prompt by the sparkle icon.

Example: List course participants

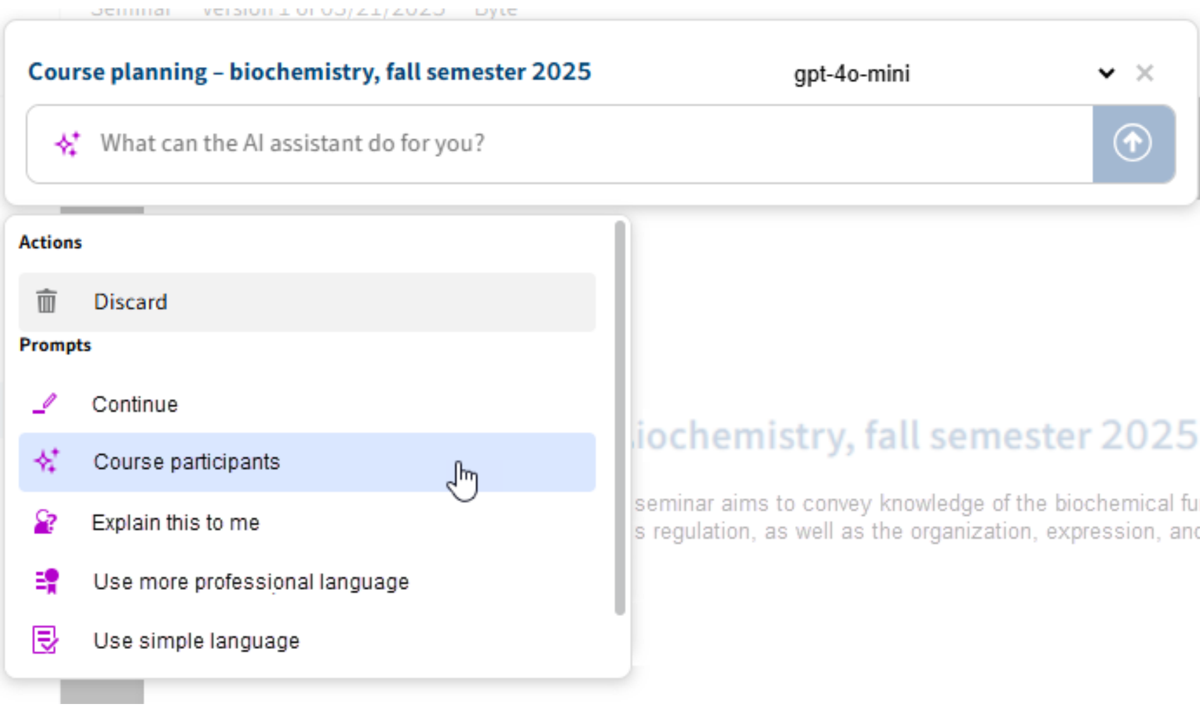
In our scenario, we are working in student administration and want to identify and list the participants in a course planning document. The custom prompt *Course participants* has been created with the following user prompt:

```
Which students are enrolled in this course? List them in a table.
```

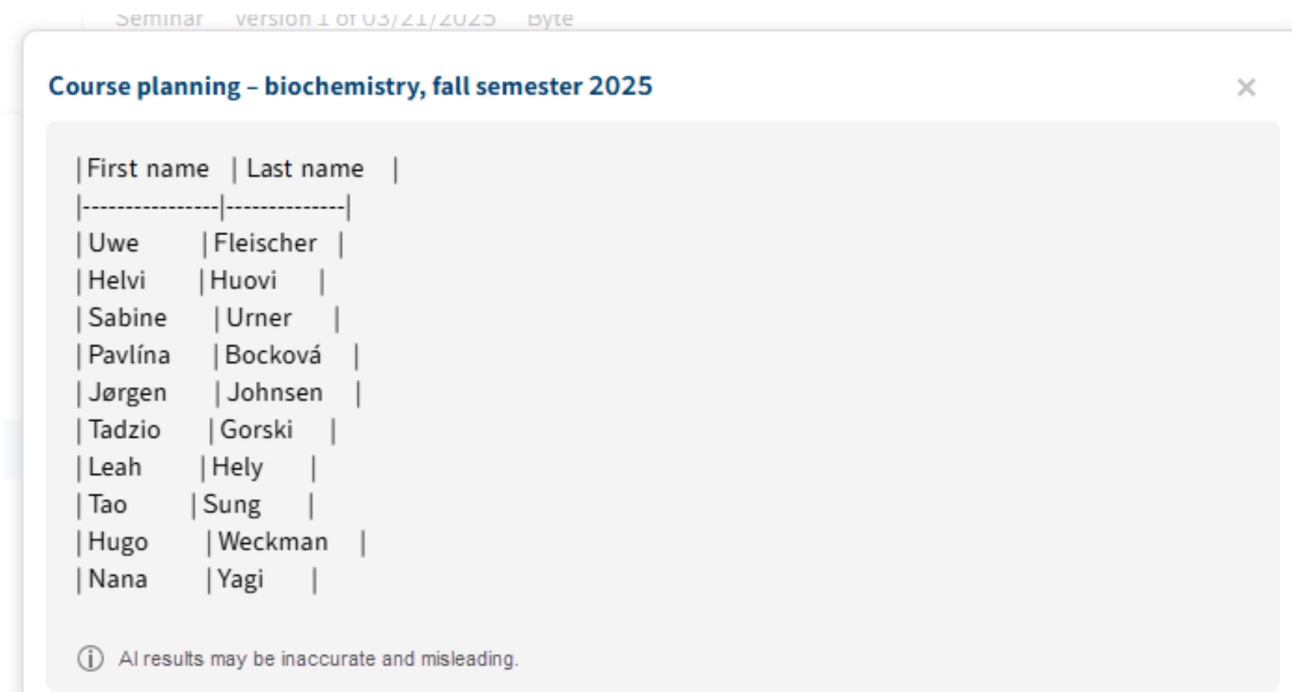
1. Open the document you want to analyze. In our example, we select a course planning document that contains course participants.

2.

Select the prompt (here: *Course participants*) in the AI assistant.



The AI assistant provides a response in the format requested.



Extract text from document

It is possible to extract specific text passages from a document and have them analyzed by the language model.

This function is recommended in two cases:

- The provided language model can only process a limited amount of context.
- Your document is very extensive and you only want to chat about a specific section (example: multi-page contract where only a specific clause is relevant to you).

Method

1. On the ribbon, select *View > Image preview*.
2. Hold down the CTRL key. Left-click and box in the section of the document you want to analyze.
3. Release.

The extracted text appears in the AI assistant.

You can now chat with the language model about this text.

> **Information**
>
> Full text is not available when using this function.

Metadata extraction

The AI assistant can help you enter metadata. Metadata can be extracted from the document and stored in the corresponding fields of a target metadata form in ELO. Metadata extraction only works with gen. 2 metadata forms.

Metadata extraction must have been configured by the administrator.

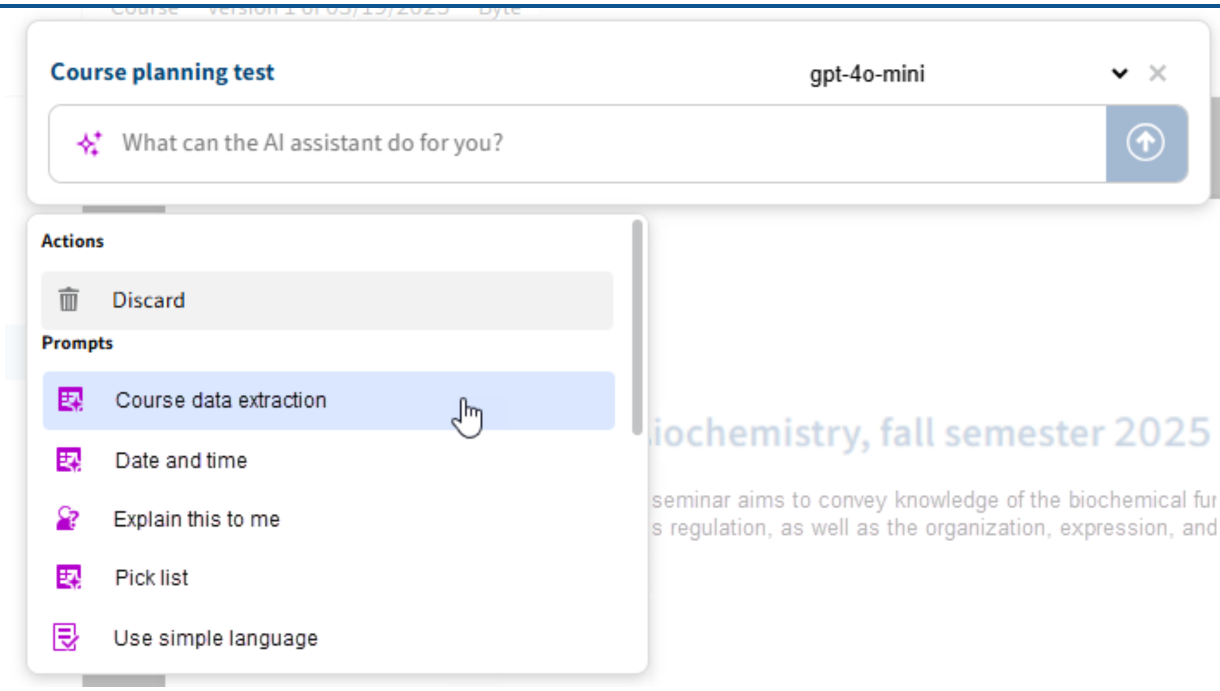
You will recognize this prompt type by the combined sparkle icon with a table in the background.

Example: Course data extraction

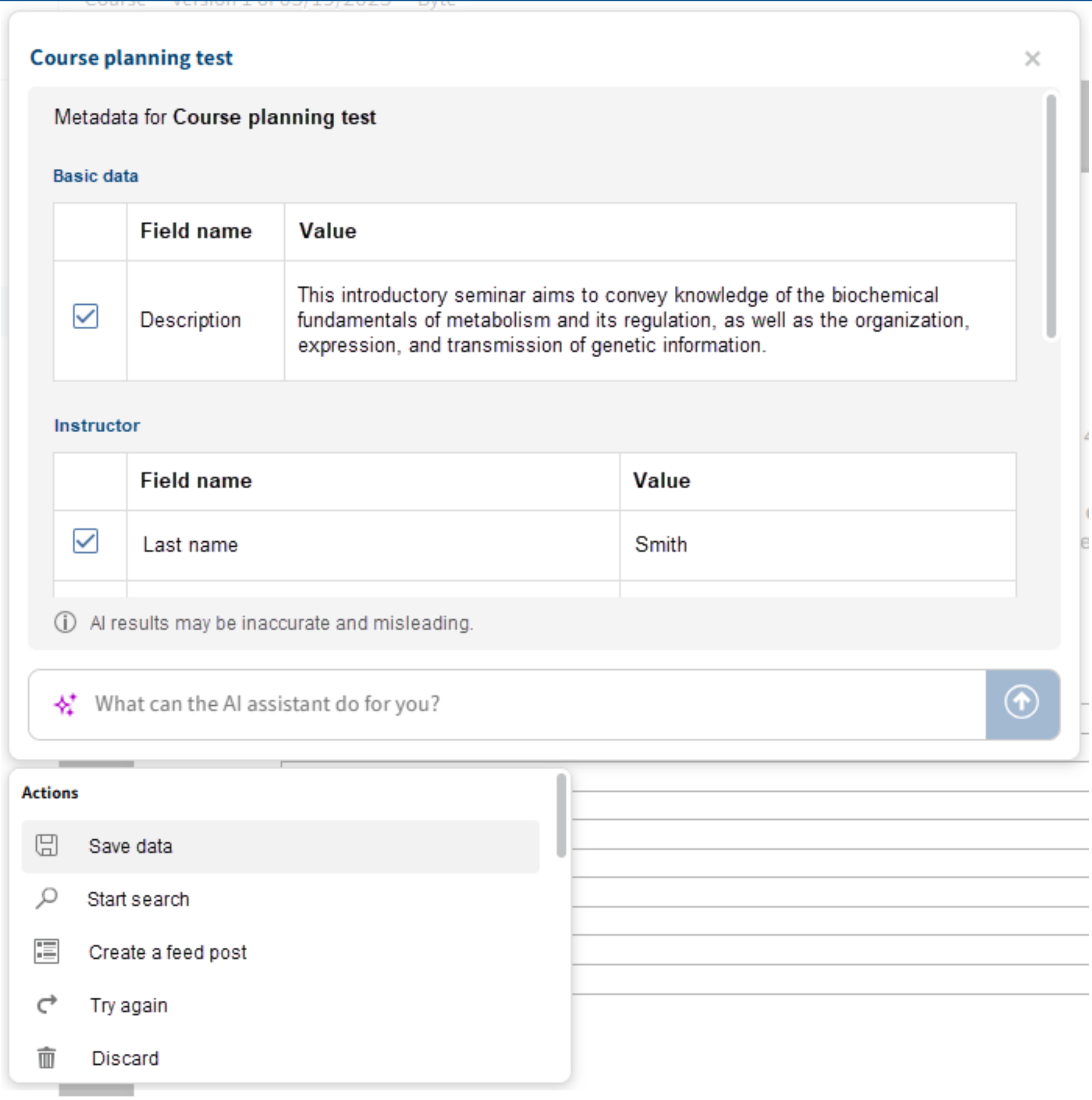
In the following example, the AI assistant will extract course data from a course planning document. Data should be assigned to fields of different aspects. Configuring this is described in the administrator documentation.

1. Open the document you want to extract data from. In our example, we select a course planning document that contains course participants.

2. Select the metadata extraction prompt (here: *Course data extraction*).



The AI assistant shows a table with all configured aspects and assigns the values to the corresponding field names.



3. Check whether the values have been assigned correctly. If you do not want to keep certain values, uncheck the corresponding box.

4. Select the *Save data* action.

The values are saved in the document's metadata.

After saving, it is possible to create a feed post. The aspects and field names are listed with the extracted values in the feed post.

Information

Refresh ELO to display the stored metadata and feed posts.