ELO Workflow Client

ELO Workflow Client

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Introduction

Structure

The goal of this user manual is to explain the functions of the ELO Workflow Client.

Introduction

The first chapter contains the copyright notices, as well as general information about using the manual and an overview of the chapter content.

Basics

This chapter explains the basics of the ELO Workflow Client. Read this chapter to acquire basic knowledge of the program.

Functions

This chapter contains examples to quickly familiarize you with the most important user-controlled actions. Read this chapter to acquire basic knowledge of the program.

Tips and tricks

This chapter contains useful tips for using the ELO Workflow Client. Use this chapter for reference.

Basics

The ELO Workflow Client is an ELO client for approving workflows.

Tasks appear in your task list. You can see which tasks have been escalated, the priority level, and other important data. You can edit tasks for different entry types. For example, if a task is part of a folder entry, you can navigate the folder hierarchy. The ELO Workflow Client allows you to process form-based tasks.

This chapter covers the following topics:

- Installation
- Program interface

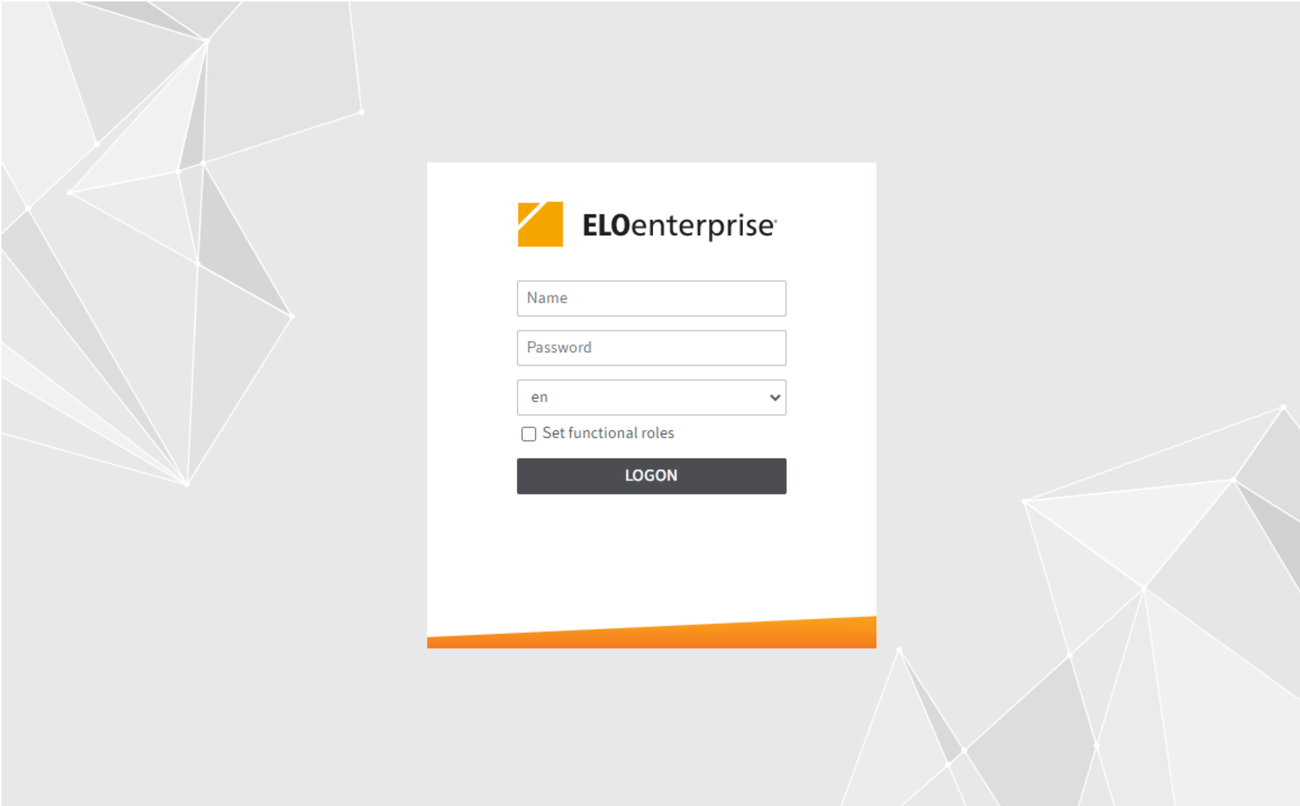
Installation

The ELO Workflow Client installs automatically with your license. The ELO Workflow Client does not have to be installed separately.

Access to the ELO Workflow Client works through a URL. You can create a desktop shortcut to the URL or bookmark it in your browser. The URL is provided by your administrator.

Start ELO Workflow Client

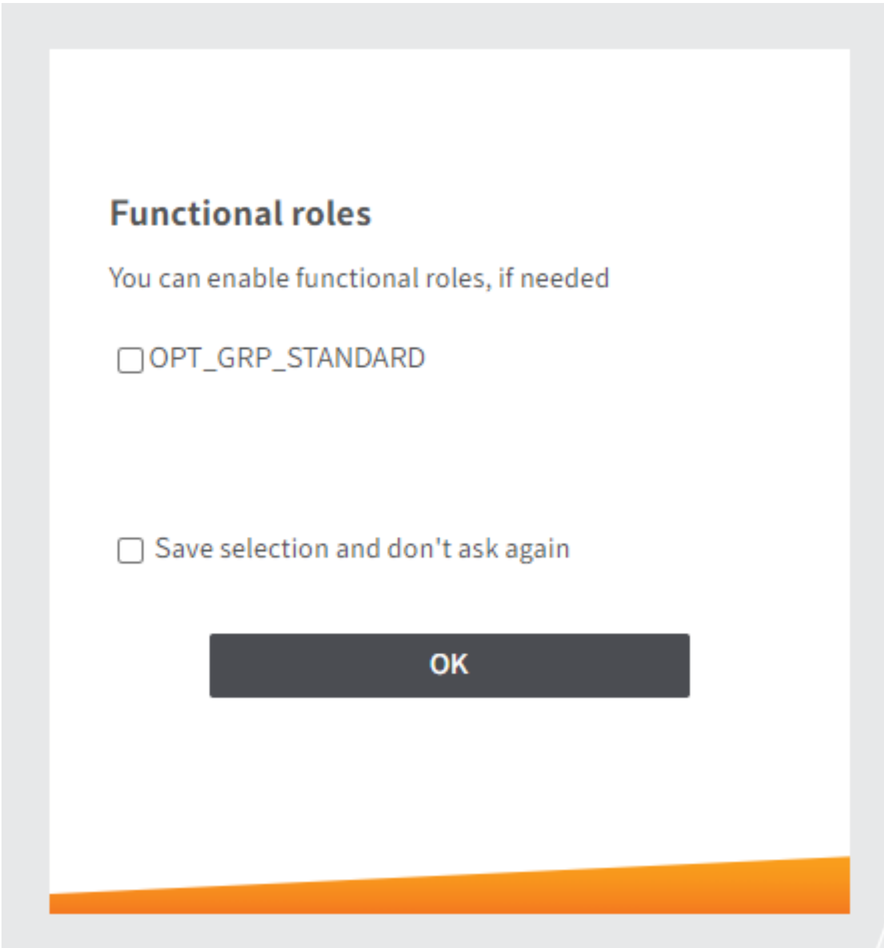
To start the ELO Workflow Client, enter the URL in your browser.



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

Information

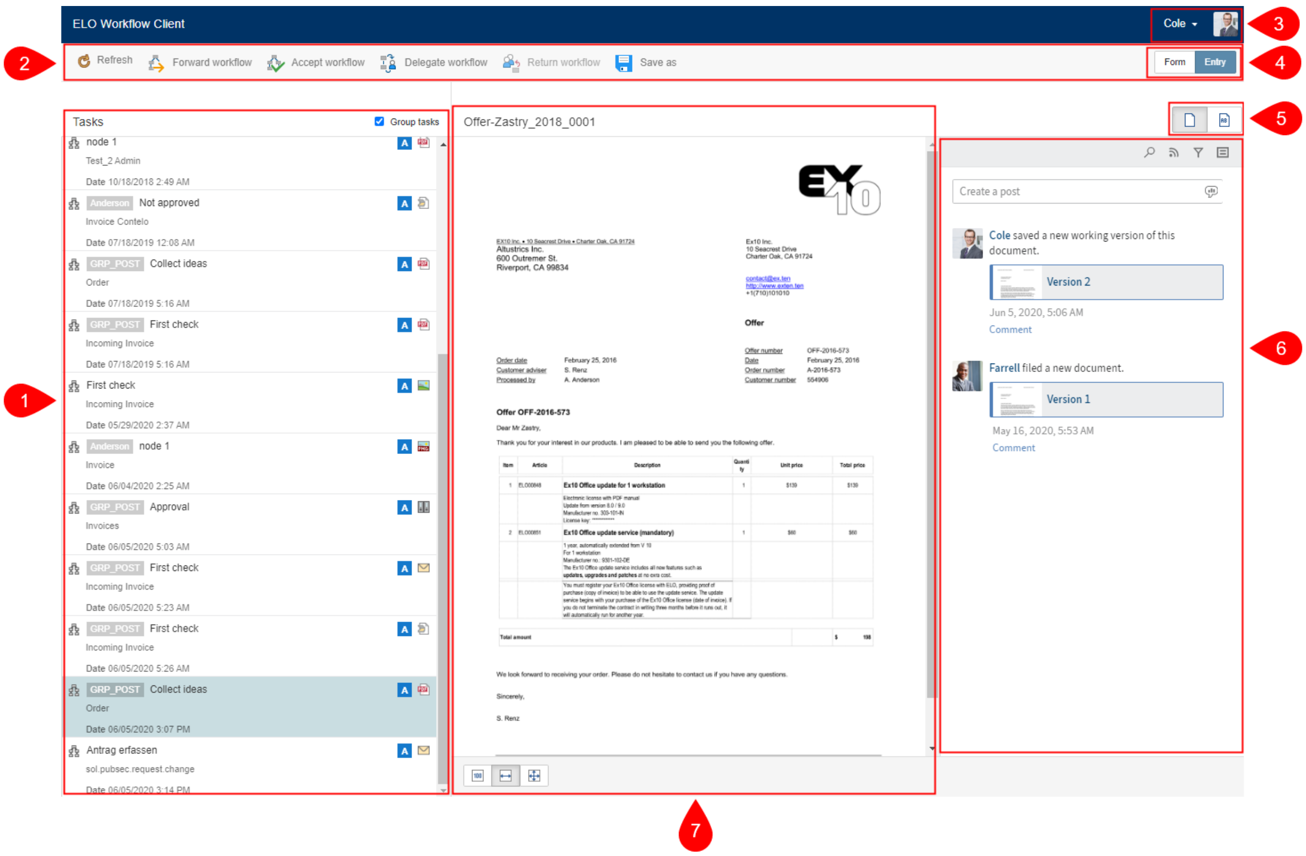
If you have forgotten your password, contact your system administrator.



If functional roles have been defined for you, you can enable or disable them here.

If you disable your functional roles, all access and user rights associated with the role cannot be used during the session. This makes it easier to navigate the program and allows you to focus on tasks beyond the scope of the role.

Program interface



The program interface of the ELO Workflow Client comprises the following areas:

1 Task list

2 Ribbon

3 User menu

4 Views (Form/Entry)

5 Views (Document/Full text)

6 Feed

7 Viewer pane

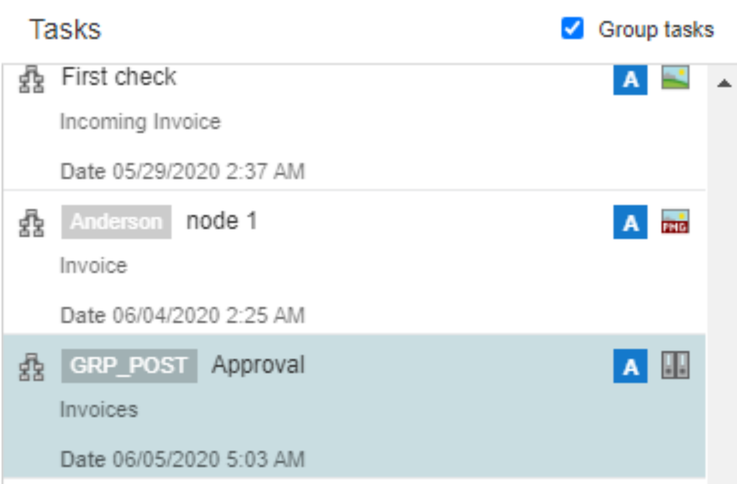
Program interface in detail

This chapter explains the different areas of the program interface. When the documentation refers to an entry, it is referring to either a document or a folder.

Task list

The task list contains all workflows. You will see all workflows you are involved in. If you set a check mark in *Group tasks*, you also see the workflows assigned to a group that you are a member of.

You can recognize a group task by the gray box containing the name of the group to the left of the workflow name.



You can recognize a new task by the blue vertical bar to the left of the task and the bold title.

A task contains the following information:

- Workflow title
- Entry title
- Workflow creation date

In addition, icons underline the following aspects:

- Entry type, e.g. Word or PDF document, an e-mail, or a scanned document
- Workflow priority, e.g. A, B, or C
- An escalated workflow is denoted with a red icon with a white exclamation mark and a due date

Ribbon

You can access all the functions you need to process your workflows on the ribbon.

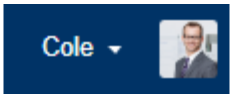
These functions are:

- Refresh
- Forward workflow
- Accept workflow
-

  Delegate workflow
- Return workflow
- Save as

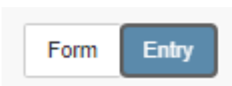
User menu

You can log off or change your password in the user menu.



Views (Form/Entry)

You can switch between the views with the *Form* and *Entry* buttons. If you select a form task, the form is displayed in the viewer pane. To switch to the entry, select the *Entry* button.



Views (Document/Full text)

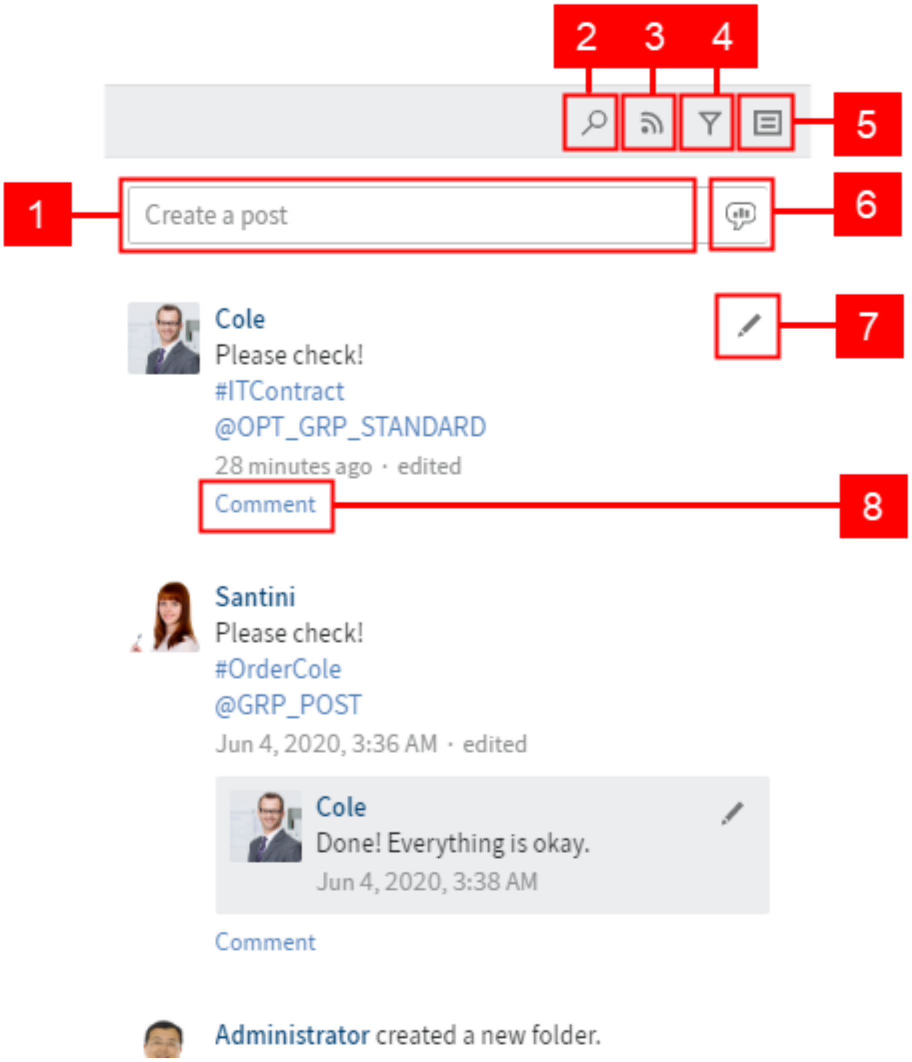
You can switch between the views with the *Document* and *Full text* buttons. If you select an entry, the document is displayed in the viewer pane. To switch to the full text view, select the *Full text* button.

Feed

The feed allows you to communicate with your colleagues about the task and the corresponding entry in the ELO Workflow Client.

This is where you get all important information relating to your workflow entry. The feed contains the following message types:

- Posts written by you or another 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



Information

With form-based tasks, the feed is only displayed if you selected the *Entry* button in the top right corner. If you selected the *Form* view, the form and other actions are displayed in the viewer pane.

1 Create post: Use the *Create a post* field to write one or more posts related to an entry in your task list. To submit a post, use the *Create* button or the keyboard shortcut CTRL+ENTER.

Information

> You cannot delete posts you have submitted.

New posts are marked with a green dot in front of the author's name.

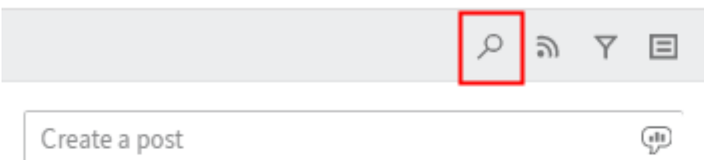
Format the text in posts and comments with the following syntax:

Bold: Place an asterisk (*) at the beginning and end of the text section you want to highlight.

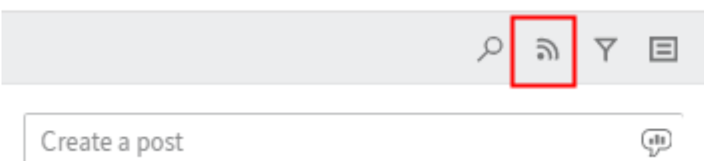
- Enter: I would like to stress this *again*.
- Result in the feed: I would like to stress this again.

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

2 Search feed: Use the *Search feed* button to search the feed for posts, users, or hashtags related to the respective entry.

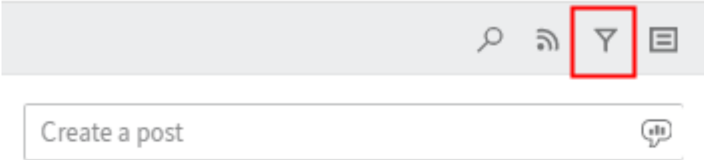


3 Subscribe to feed: Click the *Subscribe* button to subscribe to a feed for an entry.



> **Please note**
>
> Your subscription to a feed related to a specific workflow is limited to the period in which the workflow is assigned to you. Once you have forwarded the workflow, you will no longer see the feed you subscribed to.

4 Show filter options: Click the *Show filter* button to view filter options. You can filter the feed posts of the respective entry by users or post types. You can also see which filters are active when the filter options are hidden. Hide or show the filter options by clicking the button again.



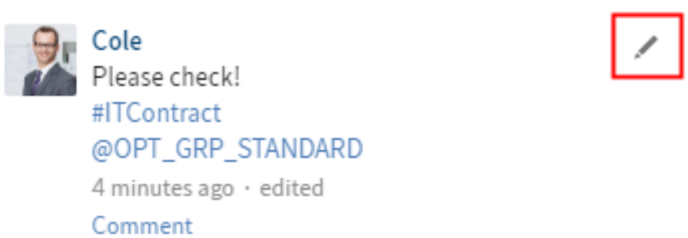
You can negate the filters. All filters are applied in *is* mode. Click the word *is* to the right of the filter category to switch to *is not* mode.

5 Show metadata: Click the *Show metadata* button to view the metadata of the respective entry. The type of entry is not relevant.

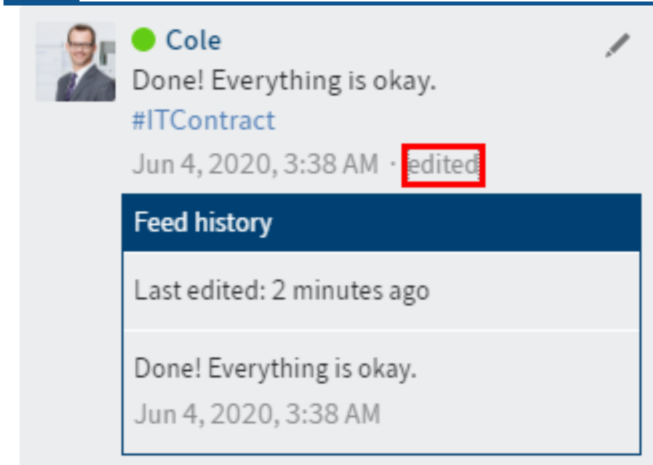
In addition to the form, you see other information, such as the invoice number, customer number, and order date of invoices.

6 Create poll: Use the speech bubble icon to create polls. Enter the question and any number of possible answers in the input fields. You can also specify how long the poll should stay open and make additional configurations by ticking the appropriate check boxes under *Show additional options*.

7 Edit post: Use the pencil icon to edit a post you have already created.

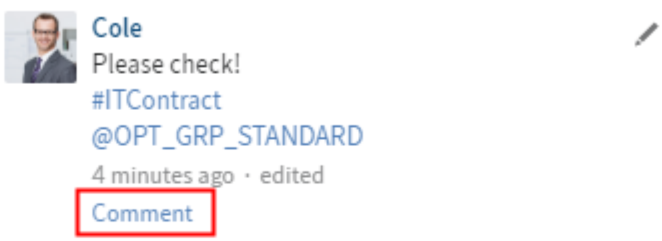


After you have edited a post or comment, you can view the feed history. Click the *edited* button that appears below your post.

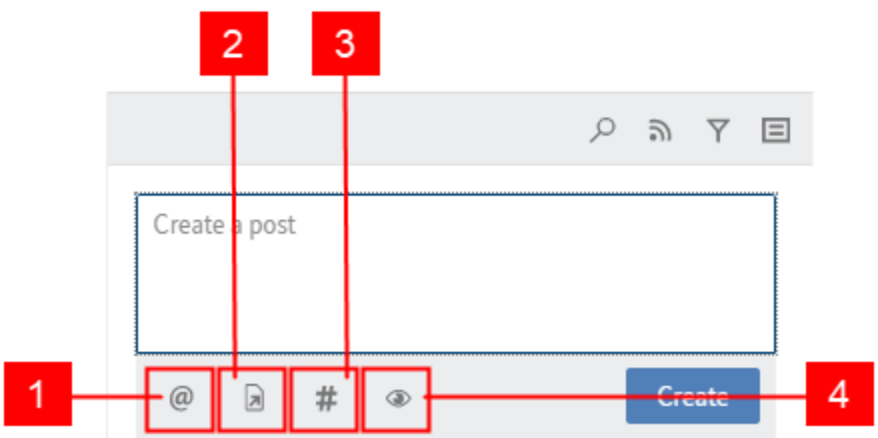


Changes to the post are indicated by a green dot in front of the name of the user who created or modified the post.

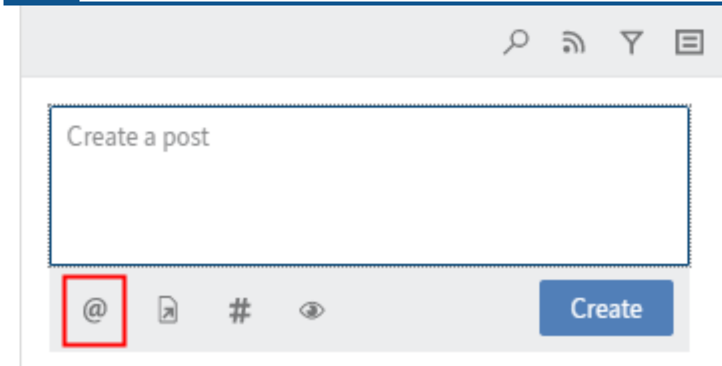
8 Enter comment: Click the *Comment* button to comment on your own posts or other users' posts.



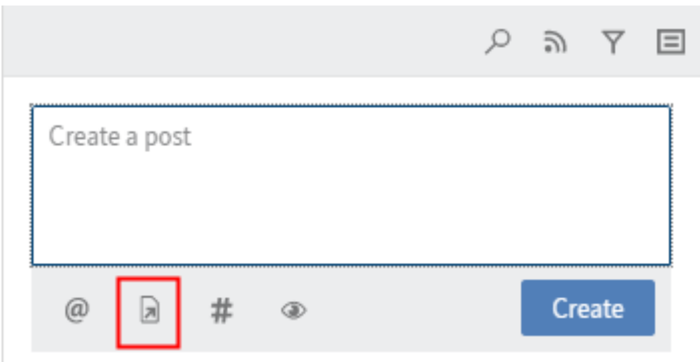
The comment function has additional functions:



1 Mention user: Click the *Mention user* button to tag other users in your post. Alternatively, you can enter the @ symbol using the keyboard.

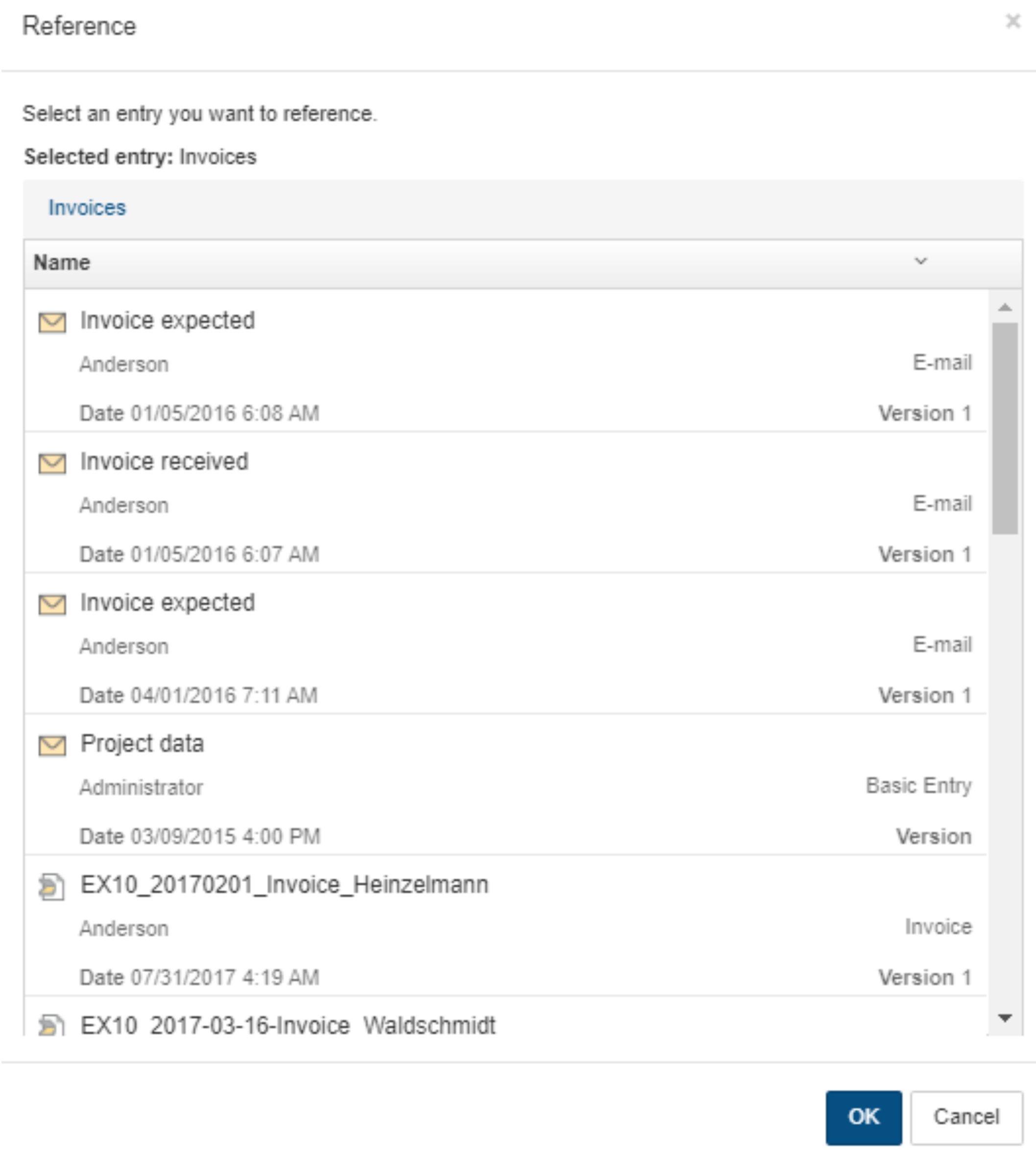


2 Reference entry: With the *Reference entry* button, you can link to other posts in your post. Alternatively, you can enter the > symbol using the keyboard.



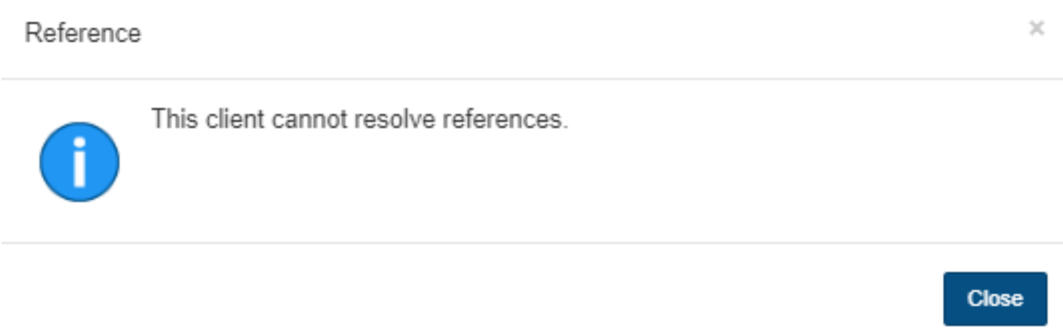
Information

You can only reference an entry if the task contains a folder.

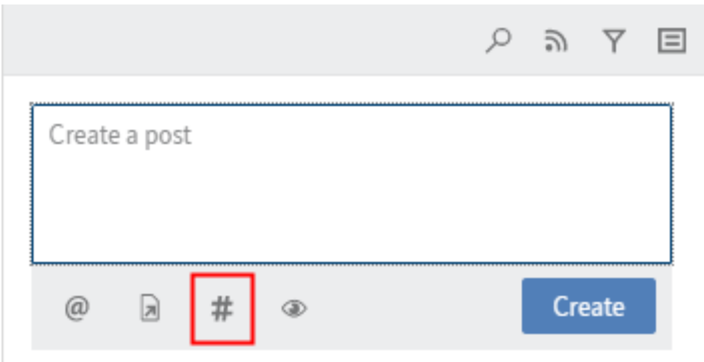


Please note

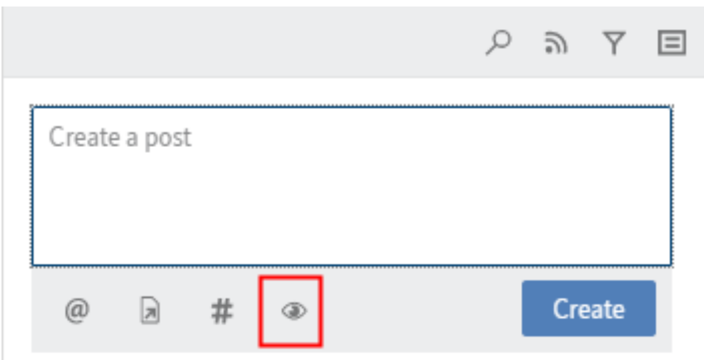
You can create a reference and see references created by other users but you are not able to access them. If you click on a reference, the following error message appears.



3 Insert hashtag: Use the *Insert hashtag* button to add one or more hashtags to your post. Alternatively, you can enter the # symbol using the keyboard.

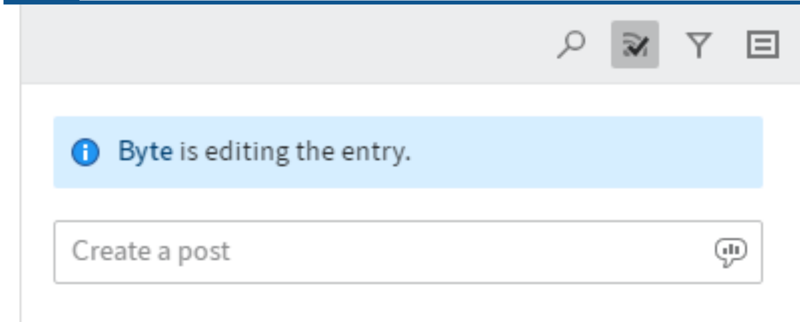


4 Restrict visibility: Use the *Restrict visibility* button to restrict the post to specific groups. The visibility settings for a comment are bound to the visibility settings for the commented post, which is why you are unable to change the visibility settings for comments.



Additional information is displayed in the area above the input field.

XY is editing the entry: This tells you that another user with access to the repository is editing the entry.

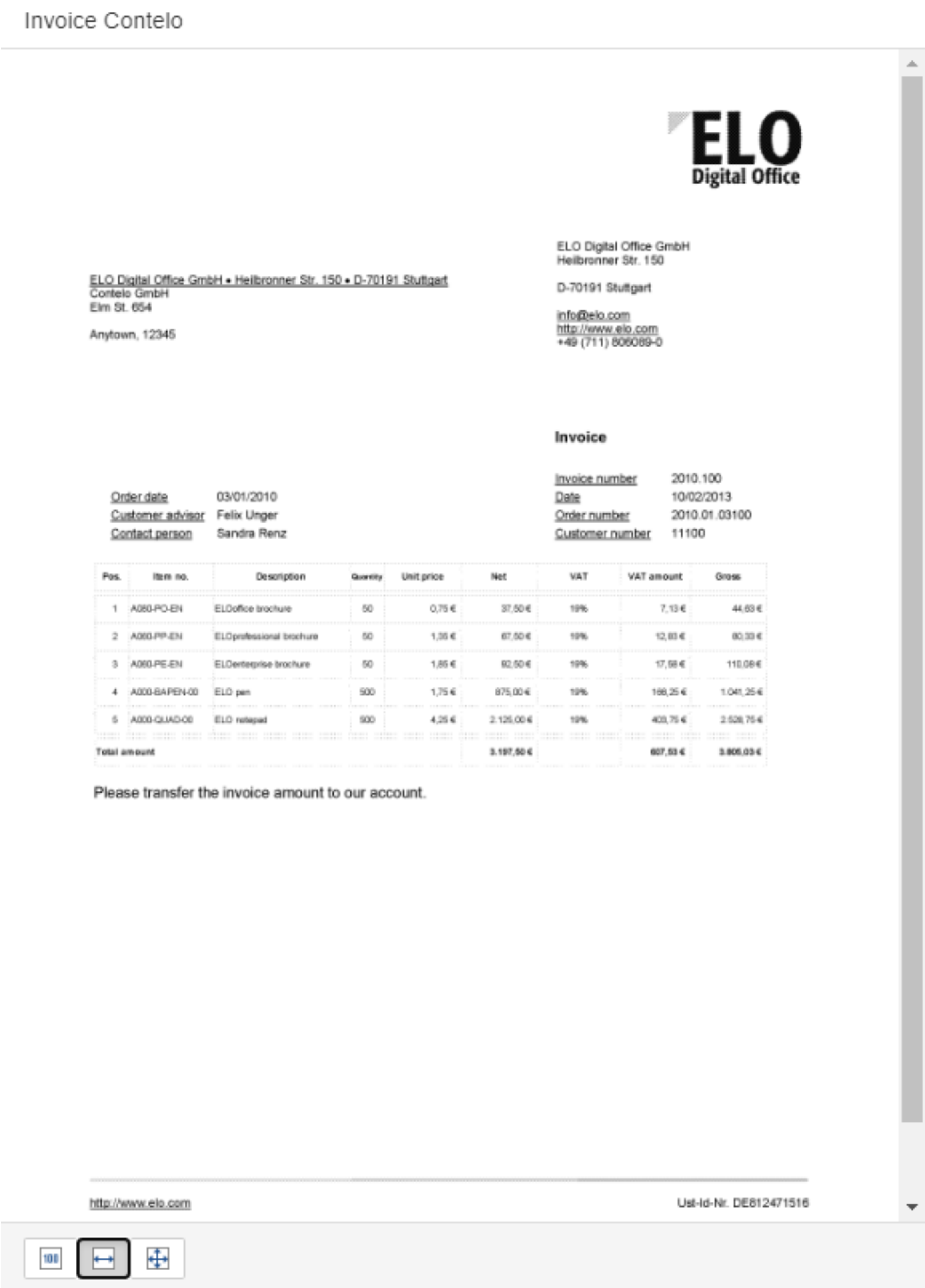


Information

You will not get any notifications in the ELO Workflow Client if entries that are part of a workflow in your task list are being edited. This information is only displayed if another user with access to the repository is currently editing the entry.

Viewer pane

In the viewer pane, you will see the entry associated with the selected workflow.



Invoice Contelo

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Contelo GmbH
Elm St. 654

Anytown, 12345

Invoice

Invoice number	2010.100
Date	10/02/2013
Order number	2010.01.03100
Customer number	11100

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

Pos.	Item no.	Description	Quantity	Unit price	Net	VAT	VAT amount	Gross
1	A060-PO-EN	ELOoffice brochure	50	0,75 €	37,50 €	19%	7,13 €	44,63 €
2	A060-PP-EN	ELOprofessional brochure	50	1,35 €	67,50 €	19%	12,83 €	80,33 €
3	A060-PE-EN	ELOenterprise brochure	50	1,85 €	92,50 €	19%	17,58 €	110,08 €
4	A000-BAPEN-00	ELO pen	500	1,75 €	875,00 €	19%	166,25 €	1.041,25 €
5	A000-QUAD-00	ELO notepad	500	4,25 €	2.125,00 €	19%	403,75 €	2.528,75 €
Total amount					3.197,50 €		607,53 €	3.805,03 €

Please transfer the invoice amount to our account.

http://www.elo.com Ust-Id-Nr. DE812471516

Image section

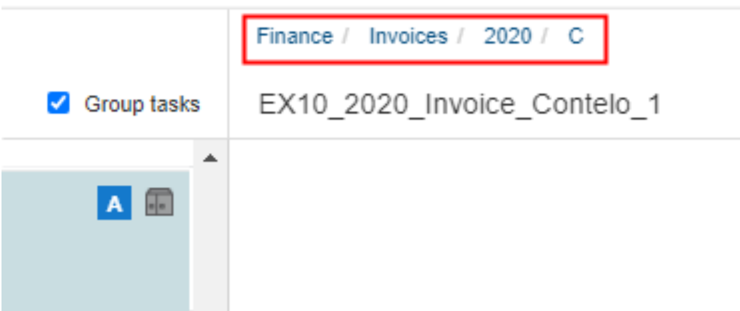
You can adjust the image section in the viewer pane with the three buttons at the bottom.

The following options are available for adjusting the image in the viewer pane:

- Zoom to 100%
- Fit image width to the frame
- Fit image size to the frame

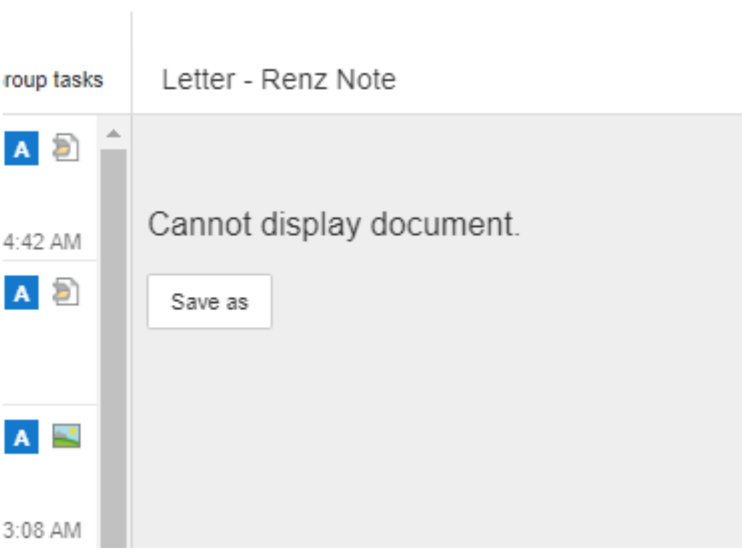
Folder navigation

If a workflow in your task list is part of a folder entry, you can navigate the folder hierarchy. In this case, you see the folder structure instead of the viewer pane. Click the respective entry to navigate through the folder structure. To return to a previous level, use the list of individual levels above the title of the document in the viewer pane. Click to go to the respective level.



Save as

If you select a task with a Word or Excel document from your task list, the following message appears in the viewer pane:



The program suggests *Save as* here. Click the button. The document is downloaded and can be opened in read-only mode.

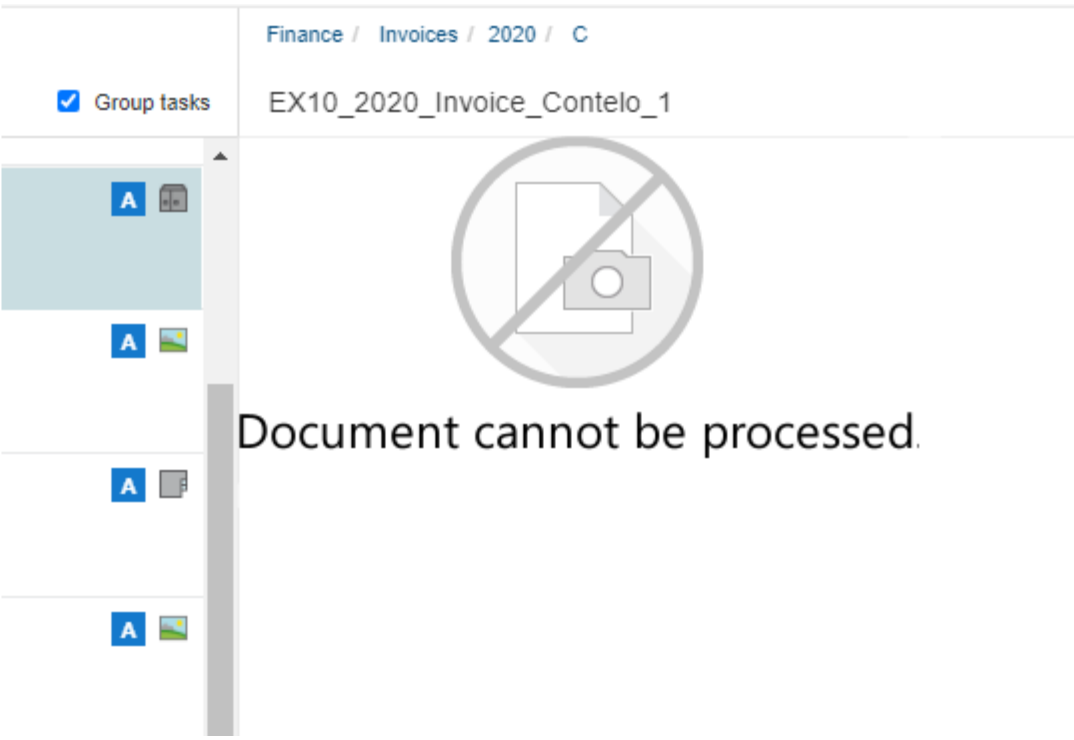
Information

If the task is part of a folder entry and you navigated to the document in this folder, the saved document may differ from the selected task.

Please note

If you download and edit a document, the changes in the workflow document are NOT visible in the ELO Workflow Client or to your colleagues. You CANNOT upload the modified document back into the ELO Workflow Client.

The following error message may appear when you select a workflow from your task list:



Select the *Save as* button on the ribbon. The document is downloaded and you can open it in read-only mode.

Text view

If you have workflows with entries with the file extension .txt, there are additional buttons in the viewer pane. These buttons are in the bottom part of the viewer pane instead of the buttons for the image section.

You can choose between two options:

-

- Large text
- Small text

Functions

This chapter explains the different functions of the ELO Workflow Client in detail. You are guided through the most important steps.

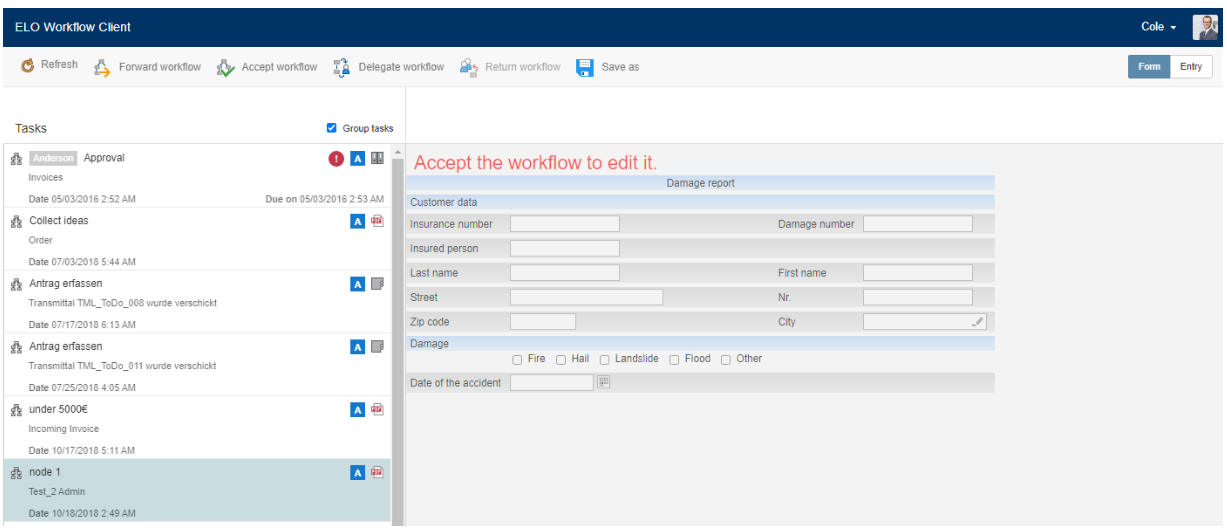
Accept workflow

To edit a workflow in the ELO Workflow Client, you must first accept the task. This prevents multiple users from being able to work on the same workflow at the same time.

> **Information**
>
> The task has to be a group task.

1. Click on the workflow in your task list.

2. On the ribbon, select *Accept workflow*.



The lock is removed and you can edit the task.

Once you have accepted the task, it is removed from the task list of the other members of the group. You can use the *Return workflow* function to undo this action.

If the *Accept workflow* button is grayed out, this can be for one of the following reasons:

- The workflow is not a group task.
- You have already accepted the workflow.

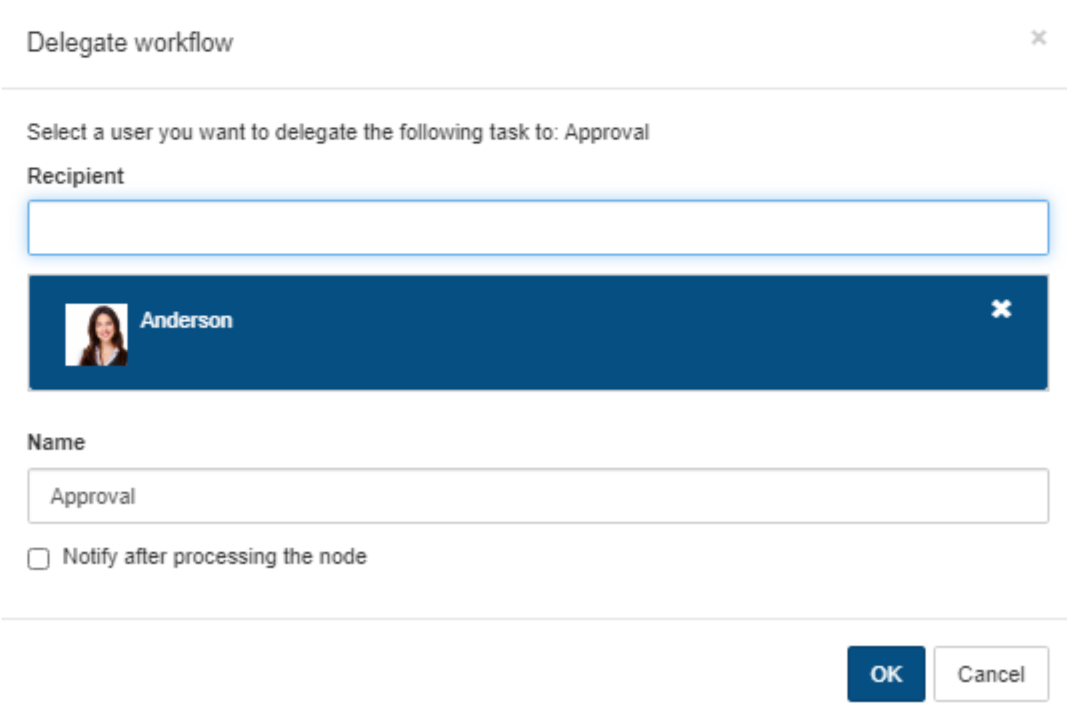
Delegate workflow

This function enables you to delegate the workflow to another user/group.

1. Click on the workflow in your task list.

2.

On the ribbon, select *Delegate workflow*.



3. In the dialog box, enter a recipient for the workflow.

The selected person/group is displayed in the dialog box. You can cancel your selection with *X* and select a new person/group.

> **Information**
>
> You can only select one user/group.

Optional: You can change the default name according to your requirements.

You can optionally check the box next to *Notify after processing the node*. In this case, you will be notified as soon as the person whom the workflow was delegated to has processed the workflow.

Once you have delegated the workflow, the task is removed from your task list.

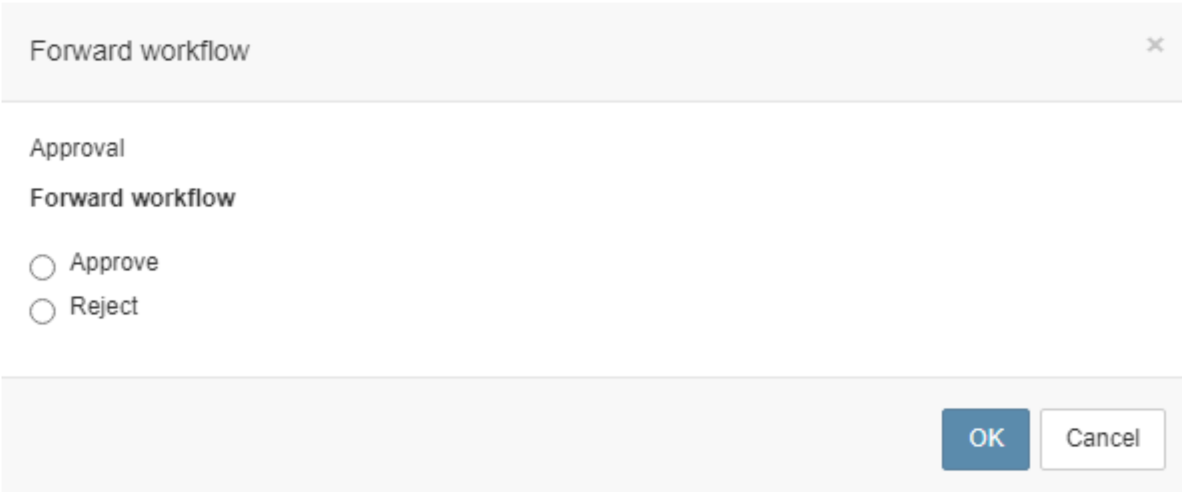
> **Information**
>
> In the case of a group task, you do NOT have to accept the workflow first.

Forward workflow

When you have completed the workflow step, you can pass it on to the next user.

1. Click on the workflow in your task list.
2.

On the ribbon, select *Forward workflow*.



3. Select one of the radio buttons *Approve* or *Reject*.

Alternative: You can forward the workflow via a standard form in the viewer pane if the corresponding administrative settings have been made.

Once you have forwarded the workflow, the task is removed from your task list.

> **Information**
>
> In the case of a group task, you have to accept the workflow first.

If the *Forward workflow* button is grayed out, this can be for one of the following reasons:

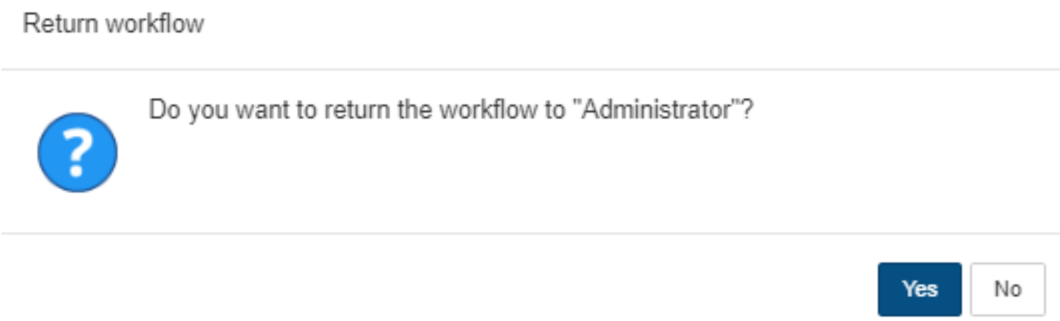
- The workflow is a group task. In this case, you must accept the workflow first.
- The workflow is a form task. In this case, forward the workflow by clicking one of the buttons on the form in the viewer pane.

Return workflow

This function enables you to return a group task that you have already accepted to the group.

1. Click on the workflow in your task list.

2. On the ribbon, select *Return workflow*.



Information

After you return the workflow, it shows up as a new task in your list because you are a member of the group that you returned the workflow to.

If the *Return workflow* button is grayed out, this can be for one of the following reasons:

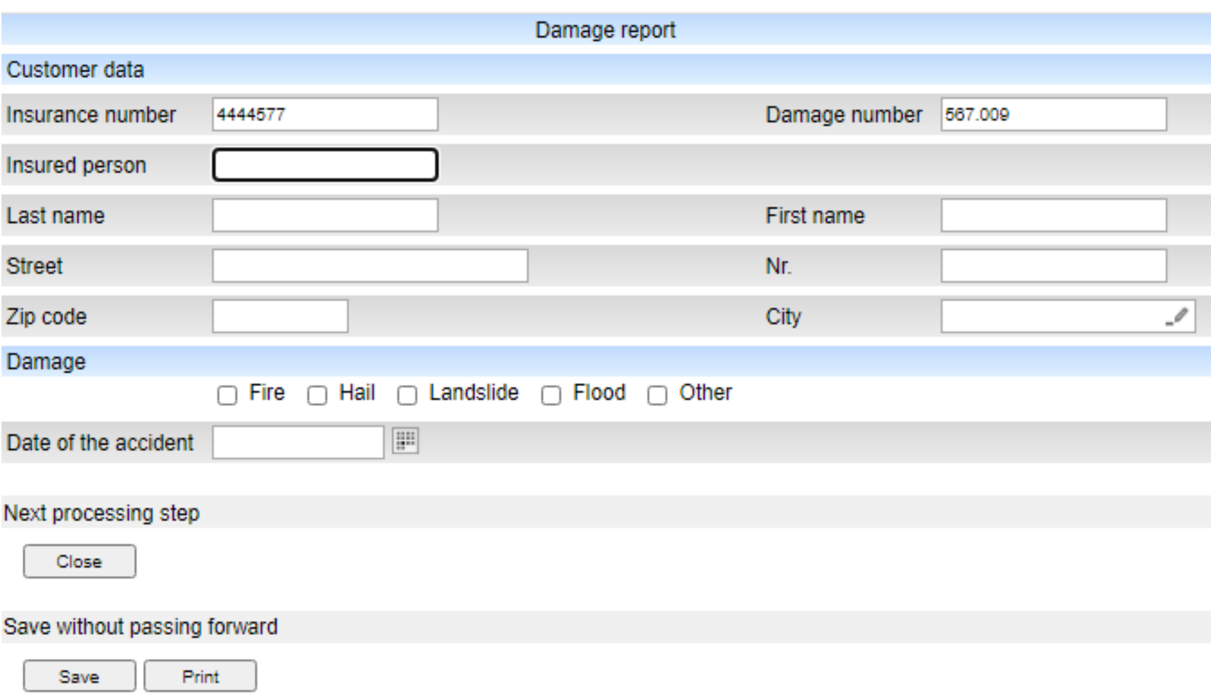
- The workflow is not a group task.
- You have not accepted the group task.

Form task

You want to edit a form-based task and forward the workflow using the form.

1. Select the task from your task list.

   The form is shown in the viewer pane.



2.

Edit the form.

3. To forward the workflow, use the buttons below *Next processing step*.

> **Information**
>
> A form-based task can contain a completed form.

The workflow is forwarded to the next user and is removed from the task list.

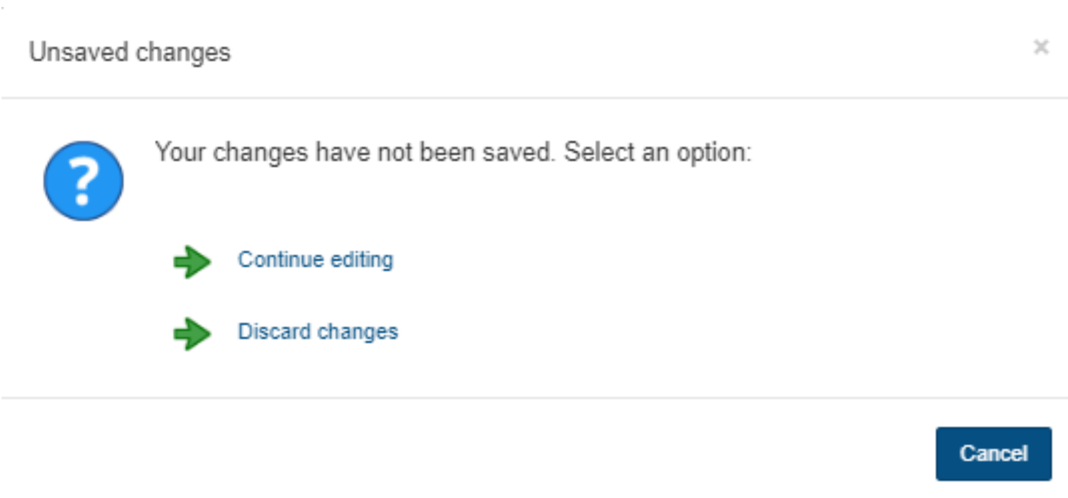
If you cannot edit the form, this can be for the following reason:

- You received the workflow as part of a group so you have to accept it before you can forward it.

Optional: You can save the task and form to the cache and edit it later on. You can also print the form.

Unsaved changes

If you close the form without saving it, the following dialog box appears:



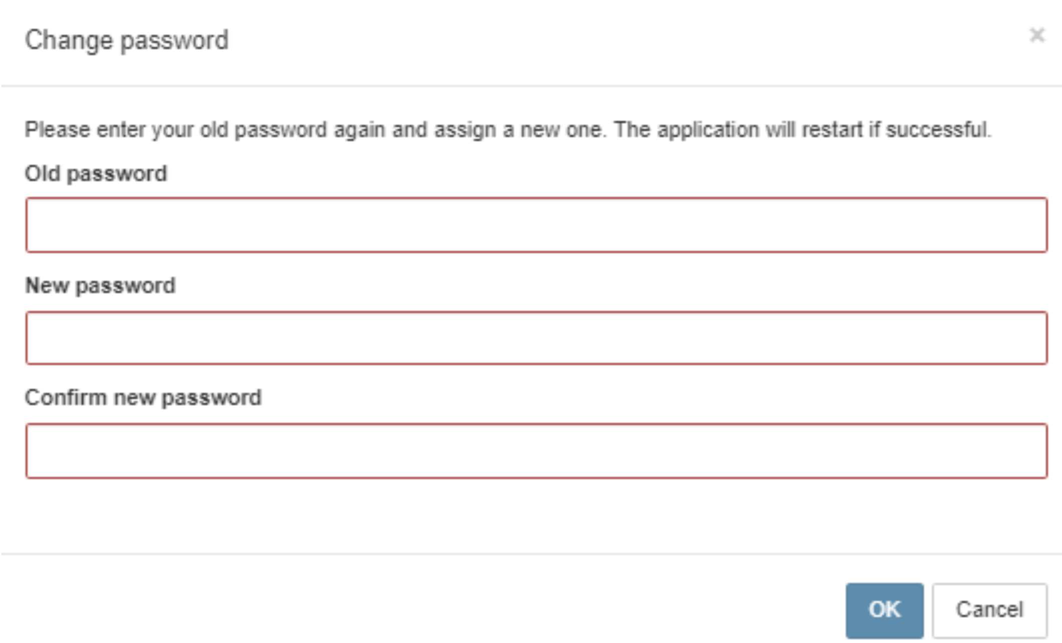
Select one of the radio buttons *Continue editing* or *Discard changes*.

Change password

You want to change your password.

1. Click the *user menu [your name]*.

2. Select *Change password*.



3. Complete the fields of the dialog box.

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

Tips and tricks

This chapter covers tips and tricks for using the ELO Workflow Client.

Refresh

New tasks will show up in your list of tasks if you refresh the list. Do this regularly to make sure you don't miss any new tasks.

> **Information**
>
> When you do a refresh, ELO jumps to the top entry in the task list.

Views (Form/Entry)

You can switch between the views with the *Form* and *Entry* buttons.

Views (Document/Full text)

You can switch between the views with the *Document* and *Full text* buttons.

Viewer pane

If a document cannot be displayed in the viewer pane, you can save the document on your computer and open it there.

> **Please note**
>
> If you download and edit a document, the changes in the workflow document are NOT visible in the ELO Workflow Client or to your colleagues. You CANNOT upload the modified document back into the ELO Workflow Client.

Escalated workflow

It is possible to set a time limit for tasks. If this time limit is reached before you complete the workflow step, the task is escalated. You can see what time limit was set by the due date in the task list. An overdue workflow features a red icon with a white exclamation mark in your task list.

> **Information**
>
> If the escalated workflow is a group task, you can hide it by removing the check mark.

Feed

With form-based tasks, the feed is only displayed if you selected the *Entry* button in the top right corner. If you selected the *Form* view button, the form and other actions are displayed in the viewer pane.

You can recognize a new post by a green dot in front of the name of the author.

The feed is an important communication tool. You can see in the feed whether changes have been made to the entry or if another user with access to the repository is editing the entry.

> **Please note**
>
> You do not receive any notifications. To see this information, you need to check the feed of the respective workflow from your task list.

You can create a reference and see references created by other users in a post or comment.

> **Information**
>
> You cannot access the references in posts or comments.

You can subscribe to the feed for an entry in a workflow.

> **Please note**
>
> Your subscription to a feed related to a specific entry is limited to the period in which the workflow is assigned to you. Once you have forwarded the workflow, you will no longer see the feed you subscribed to.

Form task

A form task can contain a form that you can edit yourself or one that is already completed.

Be sure to save the changes in the form associated with a form-based task. You will get a reminder when you close the form.

You need to forward form tasks with the buttons in the viewer pane, not with the *Forward workflow* button on the ribbon.

Group tasks

Make sure that you enable the check mark for group tasks so that you see all workflows in your task list.

Inactive buttons

Not all buttons are active at the same time. Make sure that the following requirements are met:

Accept workflow: The workflow must be a group task.

Forward workflow: In the case of a group task, you have to accept the workflow first. With a form task, forward the workflow by clicking one of the buttons on the form in the viewer pane.

Return workflow: The workflow must be a group task that you have already accepted.

Folder as part of a workflow

If a folder is part of a workflow in your task list, you can navigate between the individual levels in this folder as normal.

To return to a previous level, use the list of individual levels above the viewer pane. The levels are separated by slashes. Click to select a level.